



**Croatia's Blue Economy.**

**Ports and Shipping as**

**key drivers of growth**

**Massimo Deandreis**, General Manager of SRM

Opatija, 20th May, 2026

# Agenda

 The geopolitical role of the Mediterranean and the Adriatic Sea

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 Blue economy in Croatia

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 Croatia's international maritime trade and ports as energy hubs

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 Conclusions

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 **FOCUS:** The strategic role of ports and field analysis

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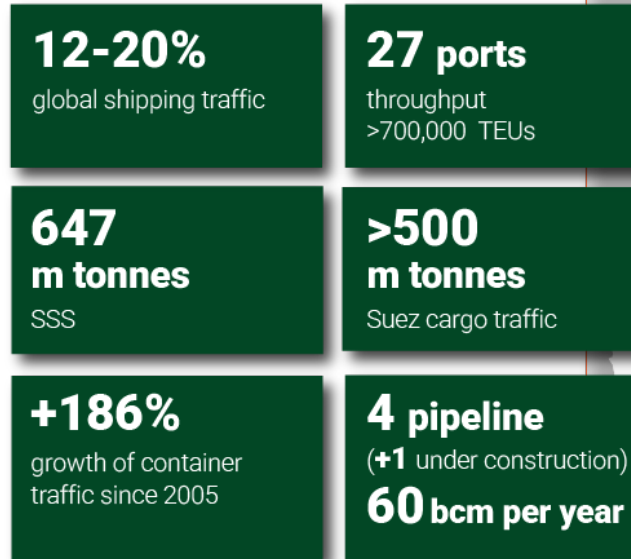
# The Mediterranean is the cornerstone of the world economy

The Mediterranean is at the centre of an area worth **\$ 29.8 tn** of total GDP, more than China and almost as much as the US.

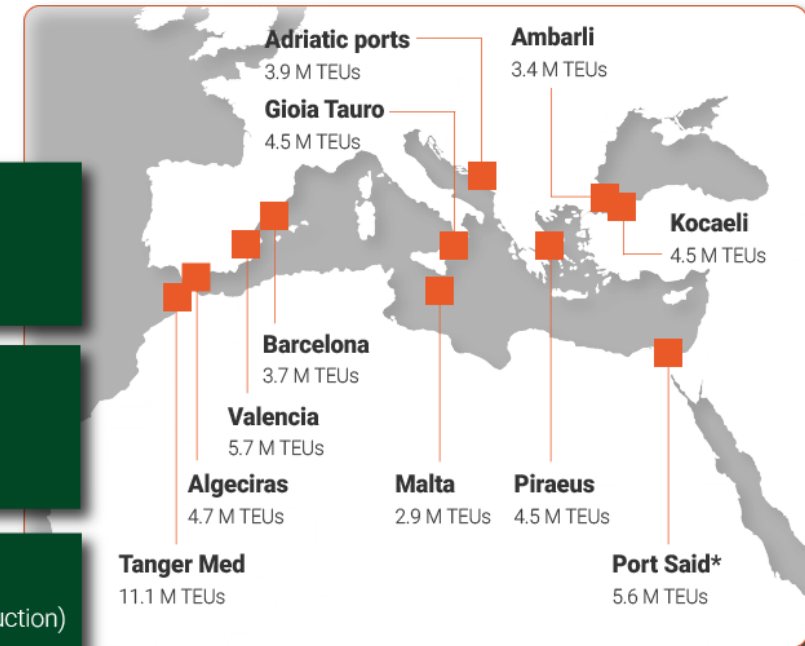
## GDP



## The key figures of the Mediterranean



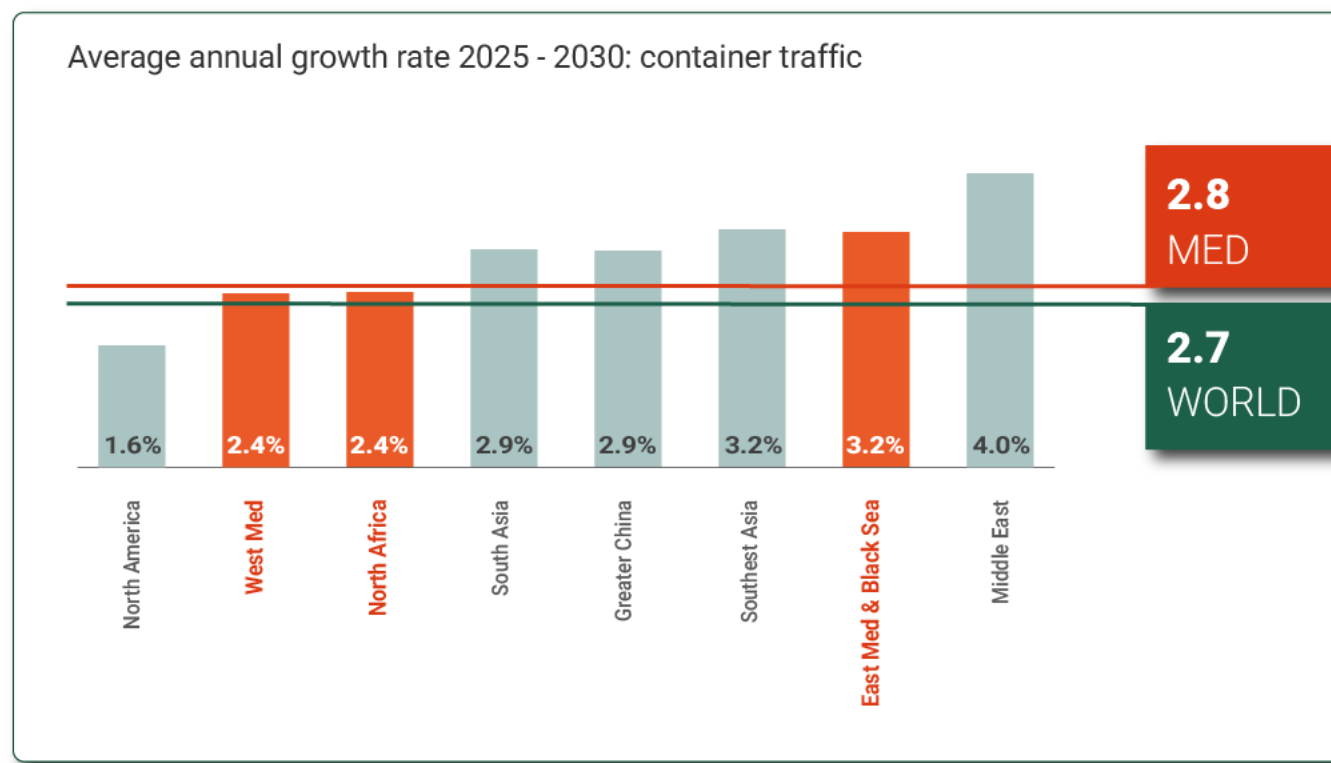
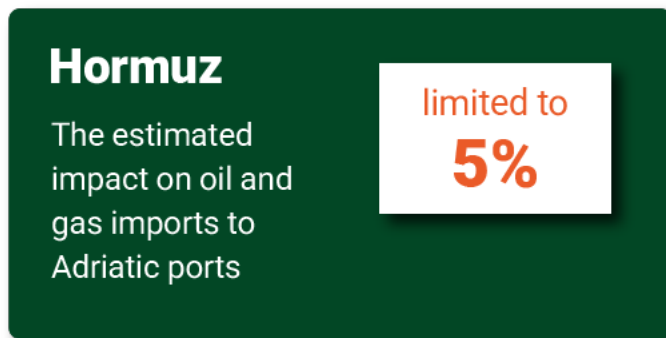
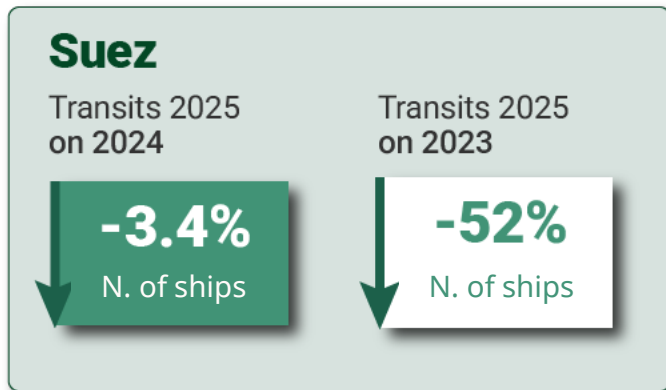
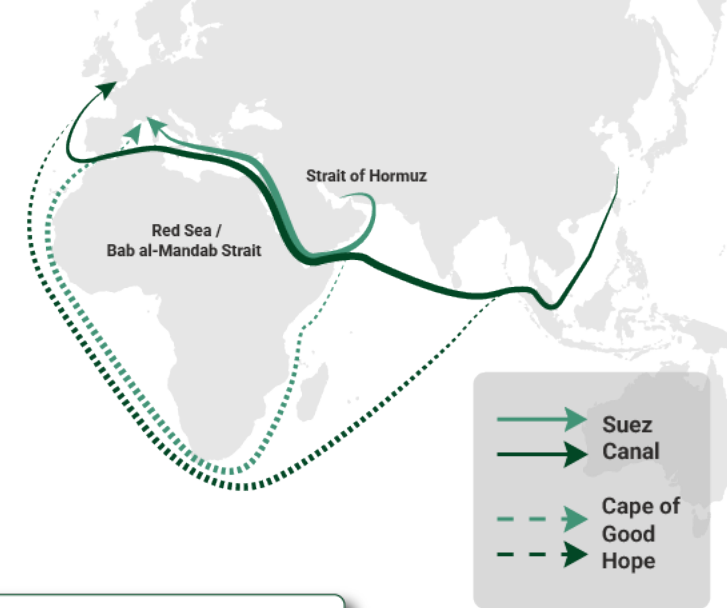
## TOP 10 container ports of the Mediterranean + Adriatic ports



\*As for Port Said, data from COSCO's terminals was considered.

Source: SRM on various data

# Hormuz and Red Sea: despite the impact on the shipping routes, the forecast of the Med container traffic is positive



# The Adriatic Sea as a gateway. It supports Central East Europe and Balkans with its maritime and energy infrastructures

The Adriatic Sea includes  
6 countries: Albania,  
Bosnia and Herzegovina,  
Croatia, Italy, Montenegro  
and Slovenia.

**GDP: \$2,799 bn**

**13% on EU GDP**

Source: SRM on IMF

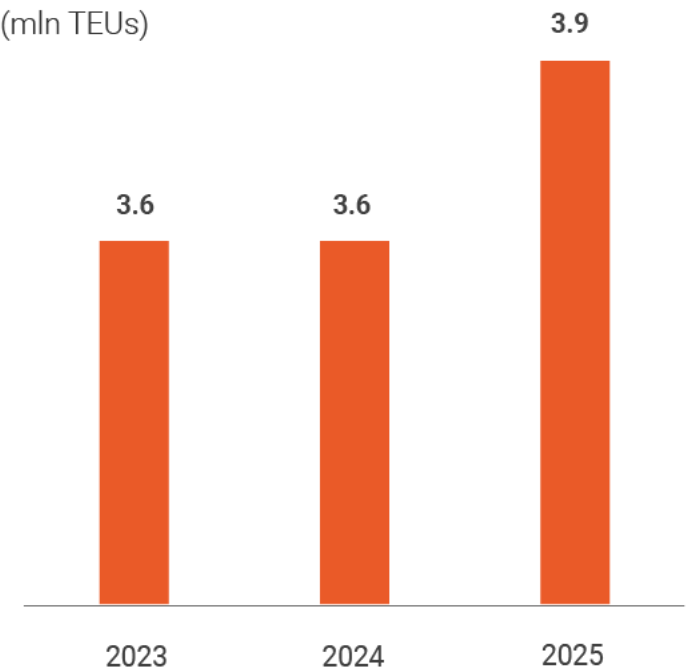


## PORTS

In the Adriatic Sea there are many important ports handling cargo that is crucial for the countries' economy.

### The Adriatic Sea. Container throughput

(mln TEUs)

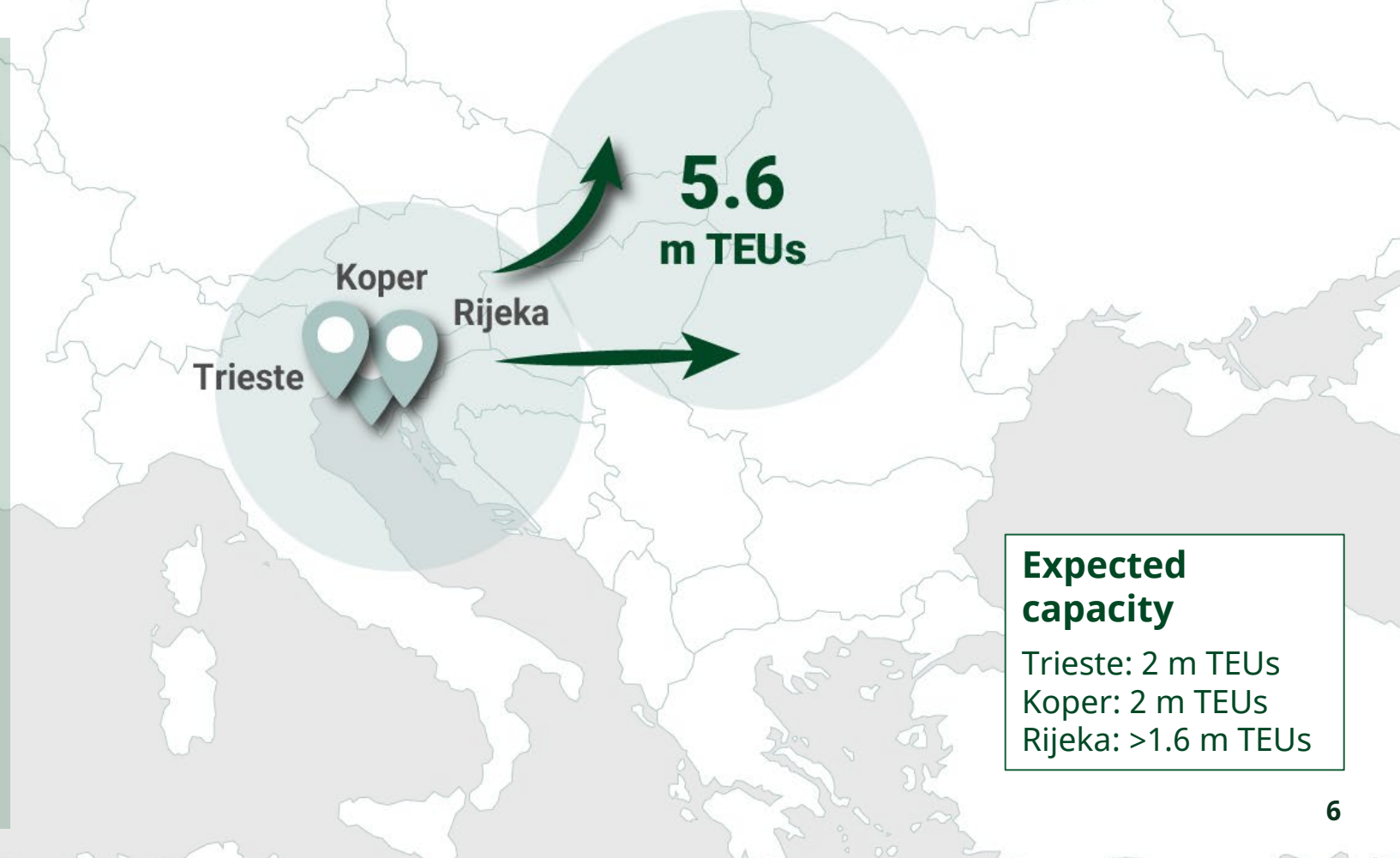


Source: SRM on Port Authorities

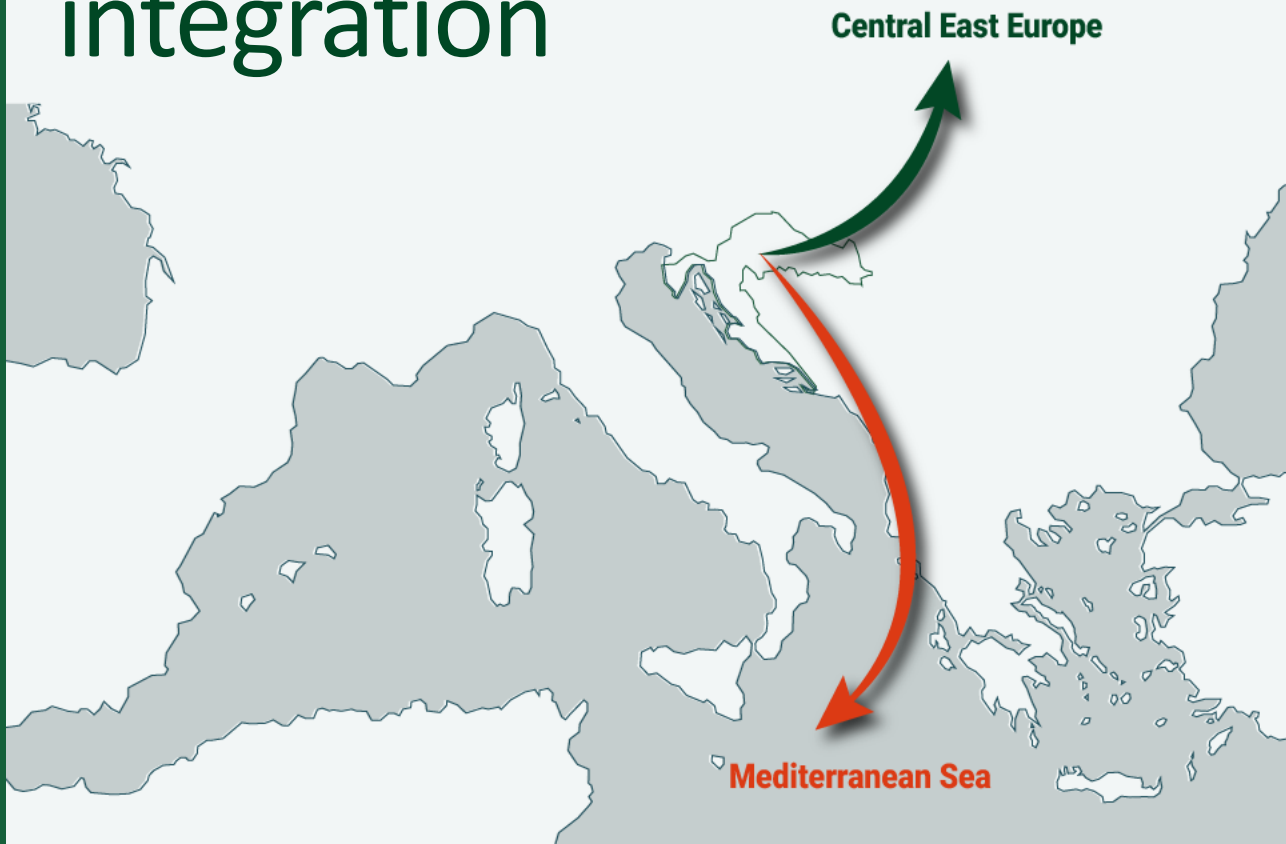
# Rijeka as part of an increasingly strong triad

The Port of **Rijeka** Authority is part of a maritime triad that also includes the ports of **Trieste** and **Koper**, which will soon have a combined capacity of over **5.6 million TEUs**.

- **Trieste** is investing in the expansion of two piers (Pier VII and Pier VIII). Total capacity at full operation: 2 million TEUs.
- In **Koper**, Pier I Terminal is being expanded. Total capacity: from 1.5 million to 2 million TEUs at full operation.
- **Rijeka**: the new Rijeka Gateway terminal (Maersk/Enna Logistik). Total capacity: from 600,000 to 1 million TEUs at full operation. The first container terminal, Brajdica, has a capacity of 650,000 TEUs per year.



# The Adriatic Sea is a strategic geopolitical crossroads and plays a key role in regional integration



## Industry Supply Chains Reorganization



Reshaping relations in the Area, following the regionalization of the globalization.

## Ports, Logistics, Tourism and Maritime Economy



A strategic sector for all these countries.

## Energy Sector crucial for all Mediterranean Strategies



The Adriatic Sea is a strategic energy corridor to Central Europe.

## Italy and Croatia could play a crucial role.

The Adriatic space could:

**Provide Italy with a gateway to major continental European regions, such as the Danube and the Baltic.**

**Be a front door to the Mediterranean.**

# Croatia's investment within the European TEN-T corridors

2 core network corridors based on railway and rivers infrastructure.

1

## The Mediterranean Corridor

- Ljubljana/Rijeka – Zagreb – Budapest – UA border
- Connecting Croatia with the major Mediterranean countries

2

## The Rhine-Danube Corridor

- The Croatian part: more than 500 km along the rivers Danube and Sava

### BENEFITS FOR CROATIA

- Strong **connectivity** with the EU
- **Ports and Logistics** development
- Growth of rail and **intermodal transport**
- Further boost for **Blue Economy**



# Blue economy is a strategic economic source

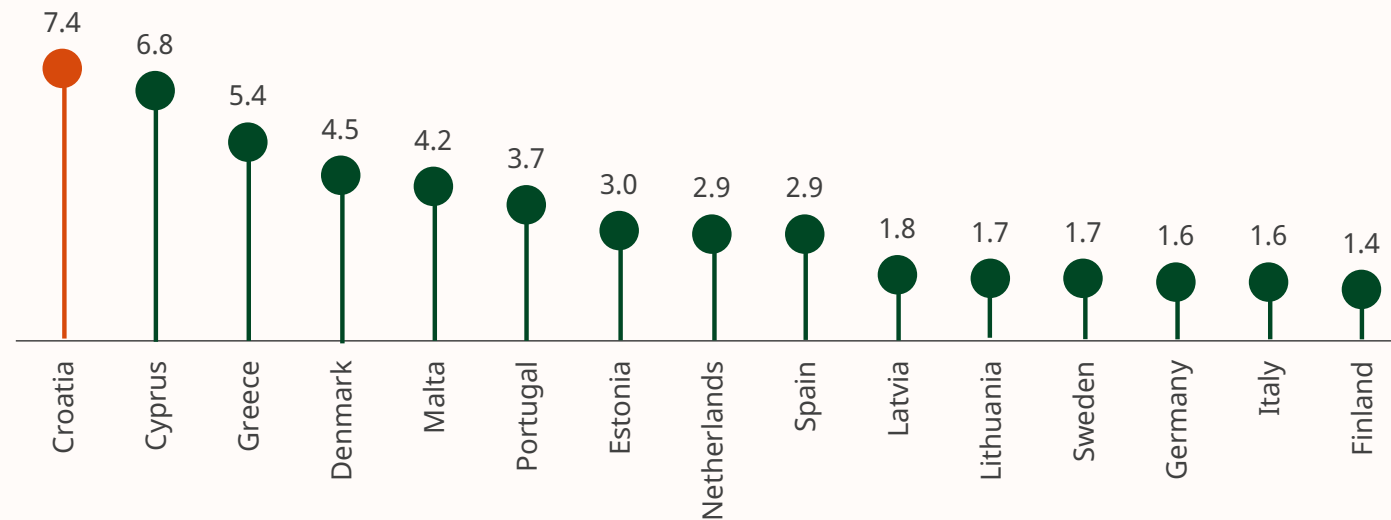
**€16 bn**  
EU investment

about **€440 m**  
Croatia investment

Blue economy **GVA** in Croatia amounts to **€4.1 billion**, more than **7%** of the country's GVA

Croatia ranks **1<sup>st</sup>** in the EU in terms of the Blue economy's share of national Gross Value Added (GVA).

Blue economy GVA weight: top 15 EU countries (% share of national GVA)



With **151,000** people employed, Blue economy sectors represent almost **10%** of Croatia's employees

Blue economy employees in Croatia (sectoral % share)

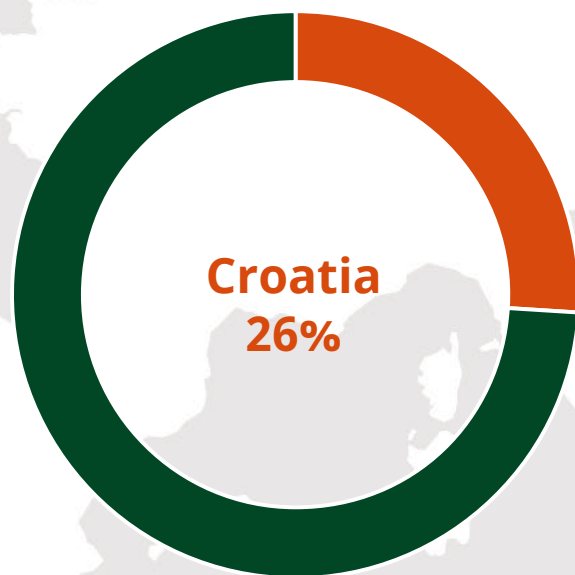


Coastal tourism **75%**  
 Living resources **11%**  
 Maritime transport **6%**  
 Port activities **5%**  
 Shipbuilding and repair **3%**

# Croatia as an international player

## Total Trade

With **€66 billion**, Croatia is the **second country** in the Eastern Adriatic Area in terms of imports-exports, **26%** of the region

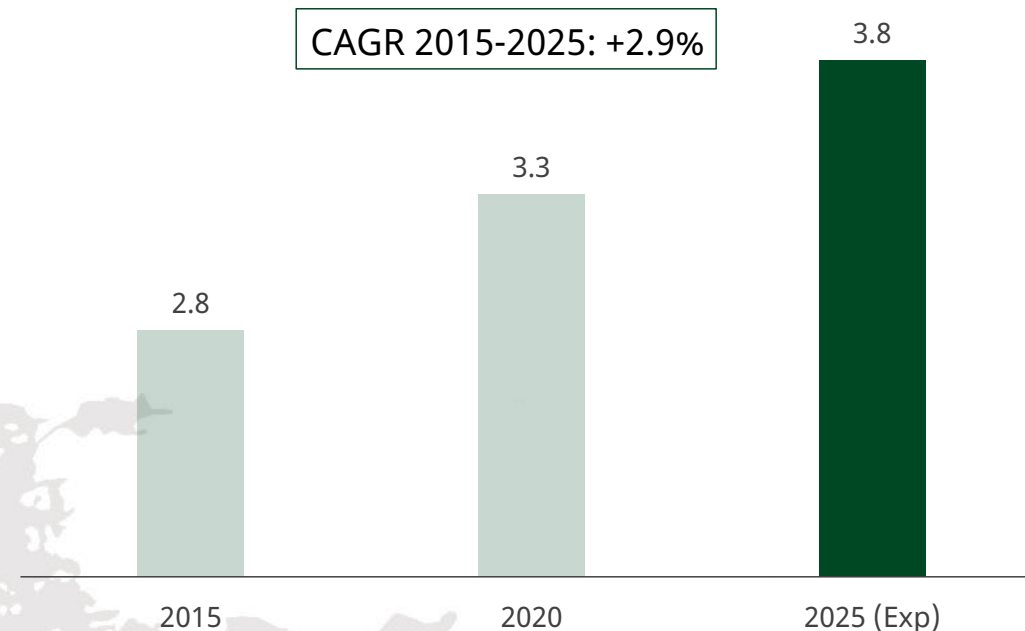


Source: SRM on Unctad

Croatia's Extra-EU trade by sea was **€3.8 bn** in 2025 (**19%** of its total Extra EU trade).

It has grown at an annual rate of **+2.9%** in the 2015-2025 period

Croatia's Extra-EU trade by sea (€bn)



Source: SRM on Eurostat

# Ports are energy sustainable hubs

The **Adriatic Sea** could become a **strategic renewable energy corridor** thanks to coordinated investments in diversified energy solutions: LNG, pipelines, off shore wind platforms and other renewables.

The Adriatic Sea is also crossed by:

- **the EastMed Pipeline (Poseidon):**  
A project to connect the East Med area with Italy and Europe;
- **TAP (Trans Adriatic Pipeline):**  
From Azerbaijan to Italy, crossing the Adriatic Sea.

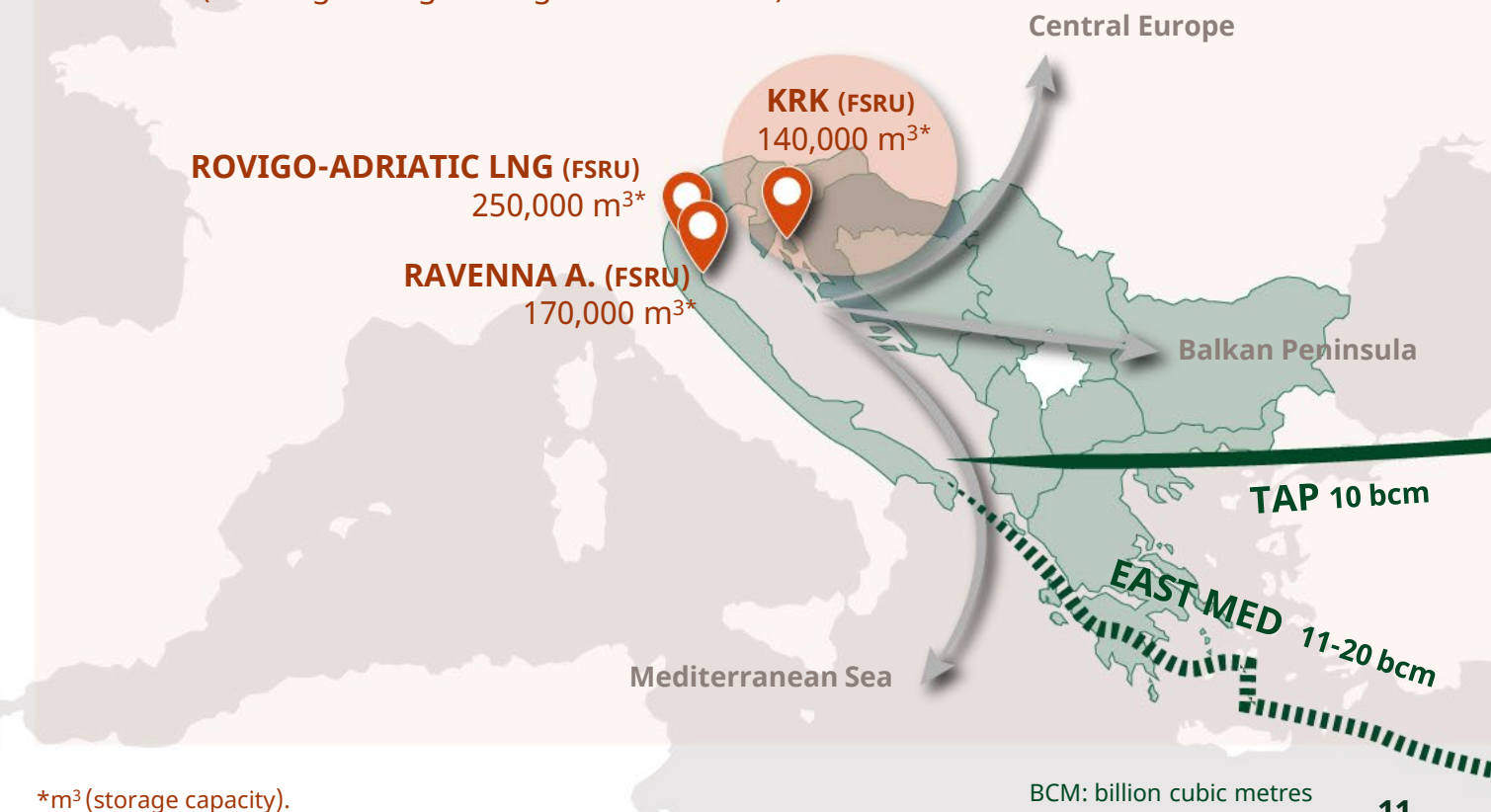
## Offshore wind platform

The Adria Wind project has launched a feasibility study for a potential **300 MW** offshore wind farm between Pula and Ravenna.

**Energy traffic** plays a key role in Croatia's port network:  
**Liquid bulk** makes up **49%** of throughput

## ACTIVE LNG TERMINALS

**3 FSRU** (Floating Storage & Regasification Unit)



# Conclusions

## Towards a new modern model of Blue Economy

### The Adriatic ports as a system

Together the Adriatic ports are a more attractive system for carriers and companies.

### Geostrategic location

Adriatic ports as a gateway between Asia, the Mediterranean and Central Eastern Europe.

### TEN-T and EU integration

2 Ten-T corridors.  
Essential to better connect Croatia with the EU markets.

### Digitalisation and sustainability

Digitalising procedures and SMEs.  
Technology for sustainability.

### Ports and intermodality investments

Increasing ports capacity and inland connection.

### Cargo and passenger integration

Blue economy is an enlarged ecosystem.  
Cargo and passenger development go hand in hand.

### Carriers and Alliances growing presence

Maersk and Enna group already investing.  
CMA-CGM to increase investments.



**PBZ**

Intesa Sanpaolo Group



**FOCUS**

**The strategic role of ports  
and field analysis**

**Alessandro Panaro**, Head of Maritime and Energy Department of SRM

Opatija, 20th May, 2026

# Agenda



**The strategic role of ports: traffic, investments and innovation**

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**Field analysis: opinion leaders in port and shipping sector**

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**Highlights on Croatian ports**

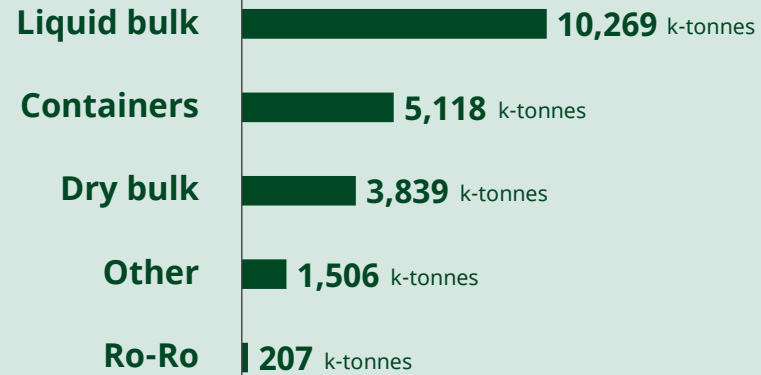
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# Croatia's port network throughput

**21 million tonnes**  
Croatia's maritime throughput  
**+13% vs. 2016**



**Liquid bulk and Container are the main sectors**



Source: SRM on Croatian Bureau of Statistics

**Investments in new container terminals**

**from 600,000 TEUs to about 2 million TEUs**

# A multipurpose port network

## 3 strategic ports:

### Port of Rijeka Authority

Top Croatian port for **container traffic** (450,000 TEUs handled, with a potential capacity of **1.6 million TEUs**)

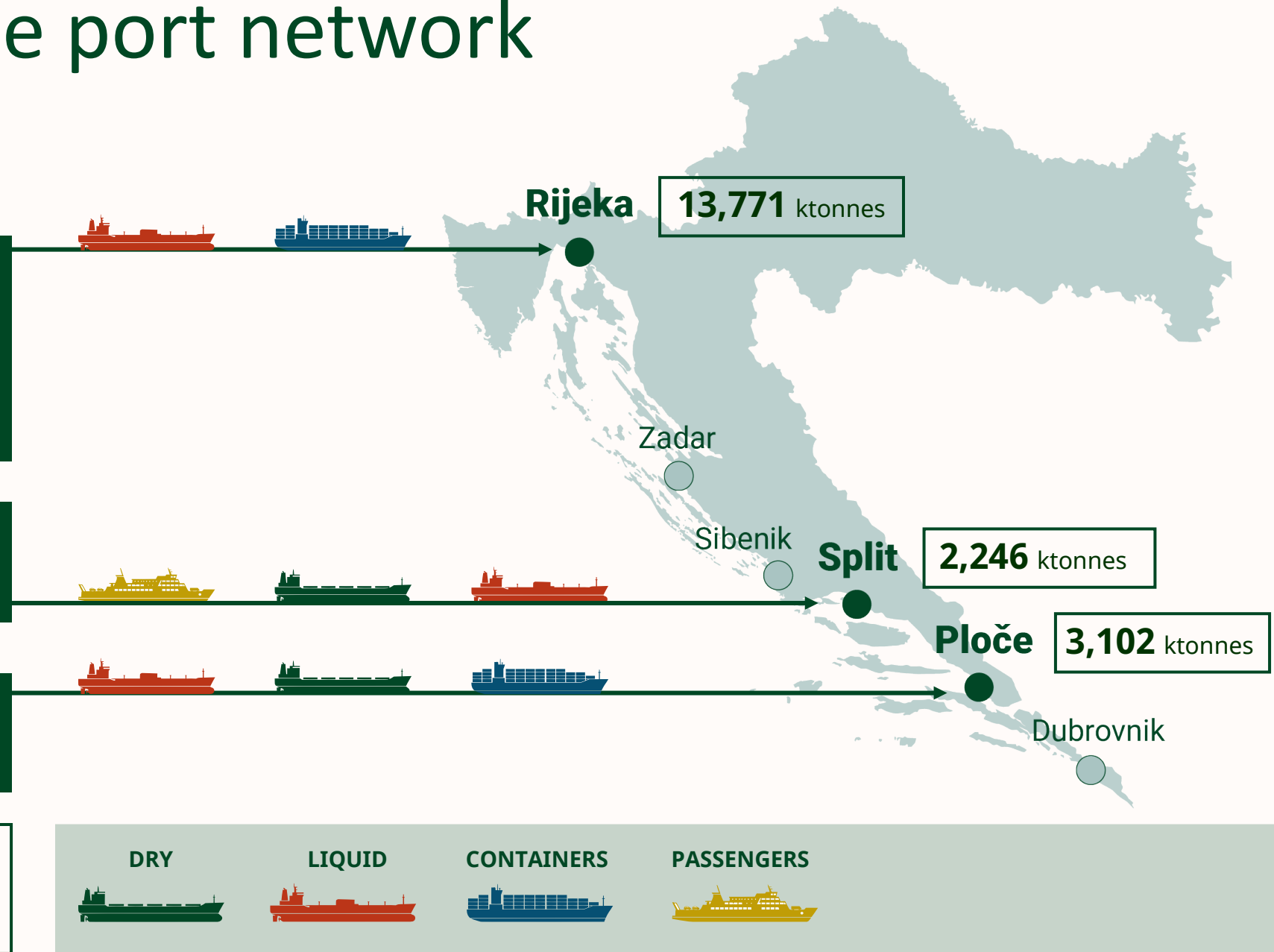
### Port of Split Authority

Specialized in passenger traffic

### Port of Ploče Authority

Specialized in Liquid and Dry bulk

**91%** of total throughput



# The port of Rijeka Authority: figures, potential and challenges

With **73%** of inbound traffic, Rijeka is a gateway between **Asia** and **Central Eastern Europe**

Rijeka PA's total throughput breakdown in 2025 (k-tonnes)

	Inwards (k-tonnes)	Outwards (k-tonnes)
<b>13,771</b> Rising at a strong pace: <b>+8.3% on 2024</b> CAGR 2015-2025: <b>2.6%</b>	<b>10,087</b> <b>+5%</b> 2.4%	<b>3,684</b> <b>+18.6%</b> 2.9%
<b>Liquid bulk 8,147 59%</b>	<b>6,611</b>	<b>1,536</b>
<b>Containers 4,689 34%</b>	<b>2,889</b>	<b>1,800</b>
<b>Dry bulk 542 4%</b>	<b>499</b>	<b>43</b>
<b>Ro-Ro 9 0%</b>	<b>4</b>	<b>5</b>
<b>Other cargo 385 3%</b>	<b>84</b>	<b>301</b>



## An attractive port for main carriers

The top three operators in Rijeka are **Hapag-Lloyd, CMA CGM and MSC** making up more than 50% of total Gross Tonnage (GT) approaching the port

## NEW

**CMA CGM: possible acquisition** of a majority stake in the port of Rijeka

This operation could strengthen the **container and Ro-Ro traffic**

# The strategic importance of infrastructural investments

## Rijeka

- **Container: New Rijeka Gateway terminal**

Joint venture between **APM Terminals (Maersk)** and **ENNA Group**. Phase 1 (2025) + 2(2035): **over 1 m TEUs added** and about **€400m** of investment.

- **Intermodality: Lowland Railway Planning (Rijeka-Zagreb)**

170-km double-track line valued at **€2.5 billion** by 2032-2036.

## Ploče

- **Container**

Terminal's capacity: planned from 60,000 to **500,000 TEU** per year.

- **Bulk cargo:**

Terminal's capacity: from 4.6 to more than **6 million tonnes**.

- **Intermodality:**

Wider integration with the **Sarajevo-Ploče rail corridor**.

## Split

- **Ro-Ro and Cruise**

A new **Ro-Ro terminal** in Stinice. **7 new berths** and infrastructure upgrade to accommodate **large cruise ships**.

- **New passenger terminals**

**Two** new passenger terminals and improved connectivity with the **Split airport**.

## Free zones

Each port has a specific **Free Zone**, with fiscal and operative advantages aimed at enhancing foreign investment in Croatia.

# A network open to investment in digitalisation

## Digital Croatia Strategy for the period until 2032

1. Smart maritime transport & ports

2. Maritime robotics & autonomous systems

3. Smart fisheries and aquaculture

4. Smart tourism and "smart marinas"

5. Environmental monitoring & digital twins

### Investments

The interregional Italy-Croatia programme 2021-2027

for Blue Economy, Maritime, and multimodal transport.



about **€25 million** for **7 projects in digitalisation**

Core aspects: **digitalisation, human resources and sustainability.**

1. Pressport	Green and smart Port hubs	€7.5m	2021 2027
2. DIH InnovaMare	Tech for sustainability	€5.6m	2024 2026
3. Mileport	Last-mile digitalisation	€2.6m	2024 2026
4. Cresport	Port cybersecurity	€2.4m	2024 2026
5. Digitports	Port digitalisation	€2.4m	2024 2026
6. BEST 4.0	SME digitalisation	€1.8m	2024 2026
7. IN4BLUE	Digital skills	€1.4m	2024 2026

# Field analysis: key results

We have conducted interviews with **8 opinion leaders** operating in Croatia's main **port authorities, terminal operators, shipbroker agencies, service providers, freight forwarders, and academic institutions**

## Strengths

1. Strong geostrategic location
2. Leader in EU Blue Economy
3. Diversified port and logistics activities
4. Investments in infrastructure, digitalisation and sustainability
5. Integration into European transport corridors (TEN-T)

## Opportunities

1. Blue Economy: a growing and strategic sector
2. Expansion of global trade flows and container traffic
3. EU and Croatia's investments in rail and logistics
4. Regional cooperation within the Adriatic area
5. Green transition and digitalisation

## Weaknesses

1. Spatial constraints (especially Rijeka)
2. Lower cargo volumes than Adriatic competitors
3. Labour shortages and rising costs
4. Administrative and regulatory inefficiencies

## Threats

1. Strong regional and global competition
2. Geopolitical instability
3. Delays in infrastructure development
4. Loss of key clients and traffic volatility
5. Environmental and climate risks

# The 4 strategic numbers of Croatian ports

## €400 million

### Investments transforming Rijeka into a strategic Adriatic logistics hub

The Rijeka Gateway project represents one of the most important maritime investments in the Adriatic, with approximately €400 million aimed at transforming Rijeka into a modern international logistics hub.

## 2.1 million TEUs

### The future container capacity strengthening Croatia's cargo attractiveness

Croatia is significantly expanding its container handling capacity, with Rijeka expected to reach up to 1.6 million TEUs, strengthening its ability to attract global cargo flows and shipping alliances.

## €25 million

### Digitalisation and innovation for smarter and more competitive ports

Croatia is accelerating the digital transformation of its maritime sector through more than €25 million (Italy-Croatia interreg) allocated to digitalisation in Blue Economy, including 7 major initiatives focused on smart ports, cybersecurity and logistics innovation.

## 49%

### Energy traffic as a strategic pillar of Croatian ports

Energy cargo already represents 49% of Croatia's maritime throughput, confirming the Adriatic's growing role as a strategic energy corridor for Europe.