

SAMPLE SURVEY ON INTERNATIONAL TRANSPORT COSTS

CLIENT: *Bank of Italy*

YEARS: 2008 – 2010

DESCRIPTION OF ACTIVITIES

TRT Trasporti e Territorio was committed by Bank of Italy to conduct a survey on the international freight transport in order to:

- i) identify the unit costs of different transport modes for imports and exports;
- ii) identify the components of ancillary costs;
- iii) show in a matrix the goods exchange abroad;
- iv) define the market share held by Italian actors in the maritime, air and rail transport sectors;
- v) estimate the turnover made by Italian shipowners abroad.

The job follows similar surveys conducted by TRT since 1998, whose results were used by the Italian Bureau of Exchange to estimate the Balance of Payments for the corresponding years.

The *unit costs of transport* were estimated on the basis of a benchmark, conducted in 2008, and two updates in 2009 and 2010.

The benchmark survey on transport costs has been led on a big sample of operators (road, rail, air and maritime services) quantifying information about: transport mode; direction; geographical area of origin and destination; load size. Questionnaires were designed after an accurate reconstruction of available information from both domestic and international statistics and output from the Strategic Transport Model developed and implemented by the consultant.

The model was used to make available information on Origin-Destination matrices and time and distances of

shipments using road, rail, air or maritime services between different regions/countries.

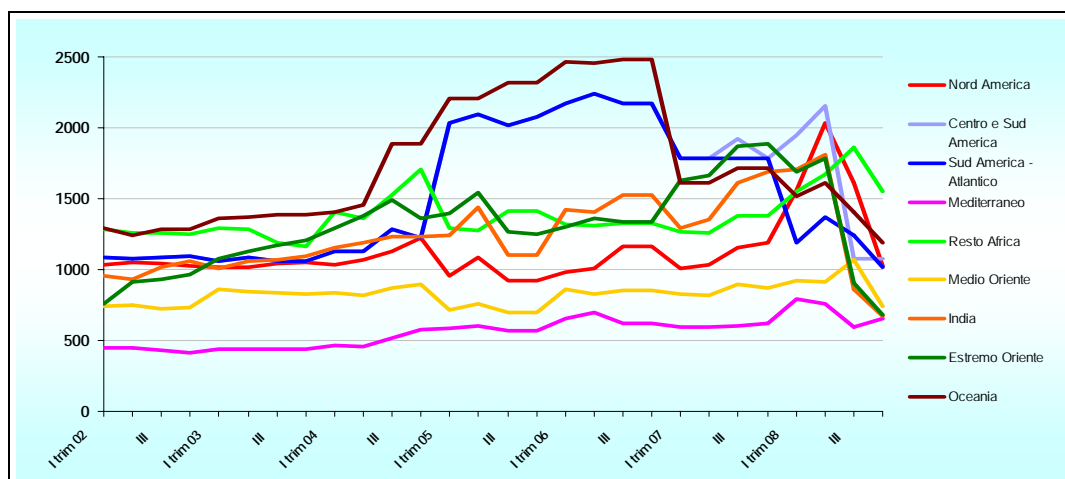
Model output was also used to validate the results obtained from the interviews in terms of cost and time of different shipments.

The outcome from the interviews was used to derive cost functions for each transport mode and for goods also for commodity group on the basis of an accurate identification of relevant variables such as distance, duration of the trip and its origin destination.

In addition to the estimate of the value of transport rates and services, the survey was also supporting the estimate of auxiliary costs.

Further activities regard market macro analysis. The matrix is reconstructed in volume and value of goods starting from the data of foreign trade, and from the available statistical data concerning the flows of goods by mode of transport. The market shares held by Italian operators are quantified on the basis of detailed sector analysis, interviews and data collected in specialized publications.

The most difficult elaboration is the *estimation of market shares* held by Italian operators in the maritime sector. It is carried out basing on the registration of ships employed in international services passed by the Italian ports in a time sample. The attribution of nationality and the quantity of goods loaded / unloaded on each ship allows to quantify the Italian presence on the total import-export trade.



Container ship: trend of import freight (2002-2008)