

Focus on coastal regions

13





The following chapter depicts two key issues for coastal regions in the [European Union \(EU\)](#), maritime transport and tourism: note that Chapter 7 presents regional statistics on tourism in a more general context, while Chapter 10 presents regional statistics for other transport modes. This chapter emphasises the characteristics of coastal regions, taking into account the Member State to which they belong and the maritime basins they border.

## Main statistical findings

### EU coastal regions and their maritime basins

Coastal regions are statistical regions defined at NUTS level 3 with a coastline or with more than half of their population living less than 50 km from the sea (for more information see the definitions in data sources and availability below). As Map 13.1 shows, EU coastal regions border several main maritime basins: the Baltic Sea, the North Sea, the North-East Atlantic Ocean, the Mediterranean Sea, the Black Sea and outermost regions. Naturally, these regions are generally distributed along oceans and seas bordering the EU coastline: an important characteristic of the outermost coastal regions, which include the island regions of Canarias (Spain), Madeira and the Açores (both Portugal) in the Atlantic Ocean as well as the French overseas territories of Guadeloupe, Martinique, Guyane and Réunion, is their distance from the European mainland.

EU coastal regions are located in 22 of the Member States that have a coastline; the Czech Republic, Luxembourg, Hungary, Austria and Slovakia are landlocked countries and are not presented in this analysis. There is currently no agreed typology for non-member countries, so the analysis does not include any statistics on EFTA or candidate countries either.

All NUTS level 3 regions within the island Member States of Cyprus (one region) and Malta (two regions) are coastal regions, as are all the regions in Denmark (11 regions); in Estonia and Ireland all regions except one are coastal regions.

Seven of the 22 Member States with a coastline have coastal regions in more than one maritime basin. These include not only France, Spain and Portugal with outermost coastal regions, but also: Spain and France, which have regions on the coasts of the North-East Atlantic Ocean and the Mediterranean Sea; Denmark, Germany and Sweden, which have regions on the coasts of the North Sea and the Baltic Sea; and the United Kingdom, which has regions on the coasts of the North-East Atlantic Ocean and the North Sea.

### Maritime freight transport

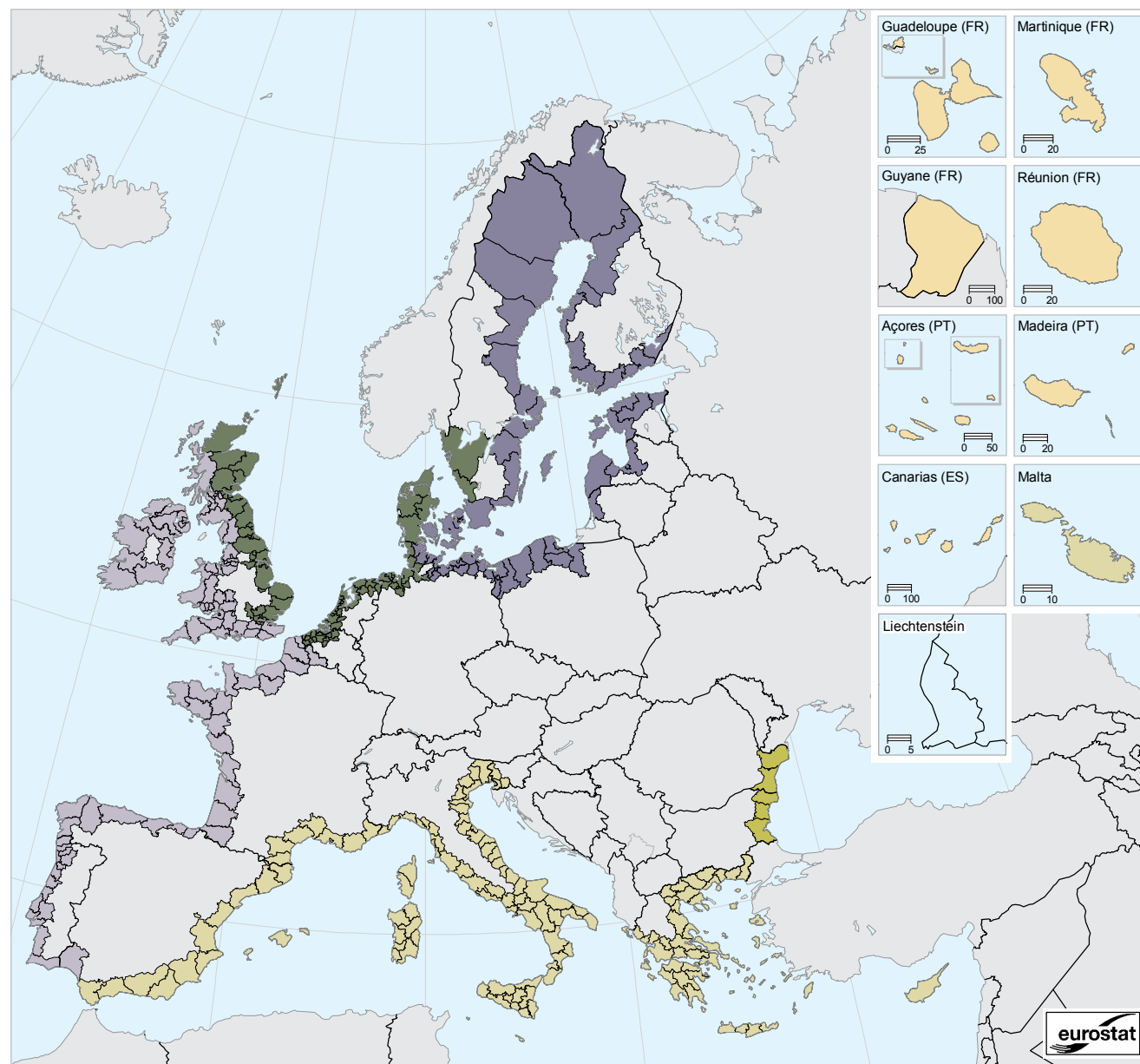
The total quantity of freight handled in EU ports in 2010 was 3 641 million tonnes, indicating the important role maritime freight transport plays, particularly in extra-EU trade. The geographical spread of the main seaports within the EU (see Map 13.2) illustrates the spread of maritime freight transport, allowing large volumes of goods to be loaded and unloaded close to their main recipients and producers. Figure 13.1 provides a summary of the distribution of maritime freight by basin, clearly showing the dominance of ports in North Sea regions, and the relatively low share of freight handled in ports in regions along the Black Sea or in the outermost regions.

The region of Groot-Rijnmond in the Netherlands, with the port of Rotterdam, handled by far the largest quantity of maritime freight: 405 million tonnes in 2010, more than two and a half times the quantity of the second-ranked region, Antwerpen in Belgium (160 million tonnes), and nearly four times the quantity of freight that was handled in the German region of Hamburg (105 million tonnes); all three of these regions were on the North Sea. Six other coastal regions recorded maritime freight in excess of 50 million tonnes, including the French regions of Seine-Maritime (including the ports of Le Havre and Rouen), which handled the largest quantity of maritime freight on the North-East Atlantic coast, and Bouches-du-Rhône (Marseille), which handled the largest quantity of maritime freight on the Mediterranean coast. For the other basins the largest quantities of maritime freight handled in EU coastal regions were: 39 million tonnes in Trojmiejski (Poland, including Gdansk and Gdynia) on the Baltic coast, 35 million tonnes in Constanta (Romania) on the Black Sea and 16 million tonnes in Gran Canaria (Spain) among the outermost regions.

Table 13.1 shows which coastal region at NUTS level 3 and which port handled the largest amount of maritime freight in 2010 for the coastal Member States. In most Member States the coastal region with the most maritime freight contained the largest freight port, but this was not the case in Greece, France or Italy: Agii Theodori was the largest freight port in Greece and is located in the region of Korinthia; Marseille was the largest freight port in France (in the region of the Bouches-du-Rhône); and Genova was the largest freight port in Italy (in the region of the same name). Table 13.1 also provides an overview of the quantity of freight handled and recent developments for each of the EU's coastal Member States. The three Member States with the largest quantity of maritime freight in 2010 were the Netherlands, the United Kingdom and Italy, followed at some distance by Spain and France. Between 2007 and 2010 the quantity of maritime freight handled within the EU-27 fell by 7.5%, illustrating

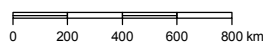


Map 13.1: Coastal regions in the EU, by sea basin and by NUTS 3 regions



- North Sea
- Black Sea
- Mediterranean Sea
- Baltic Sea
- North-East Atlantic Ocean
- Outermost regions
- Data not available

Administrative boundaries: © EuroGeographics © UN-FAO © Turkstat  
 Cartography: Eurostat — GISCO, 04/2012

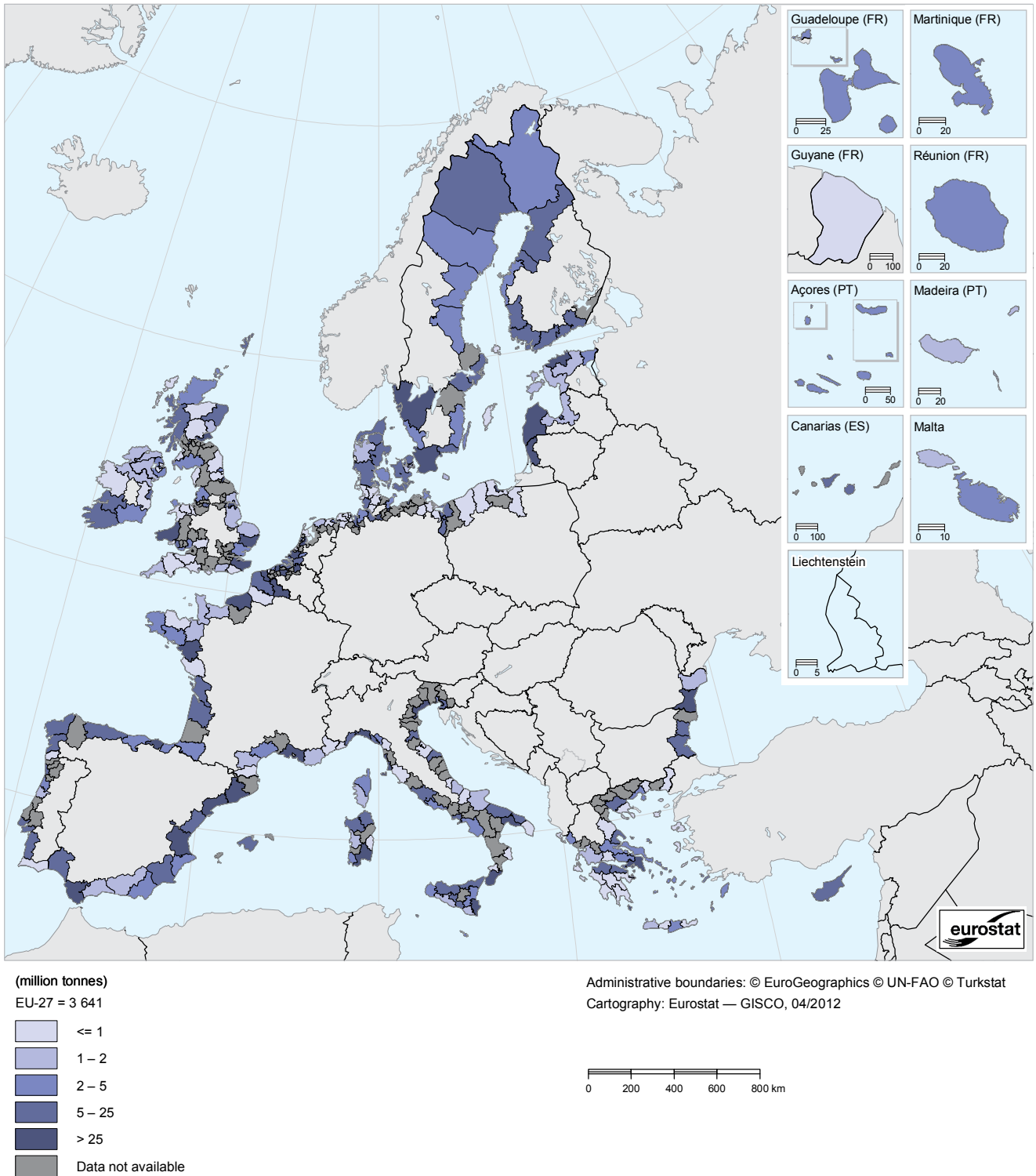


Source: Eurostat





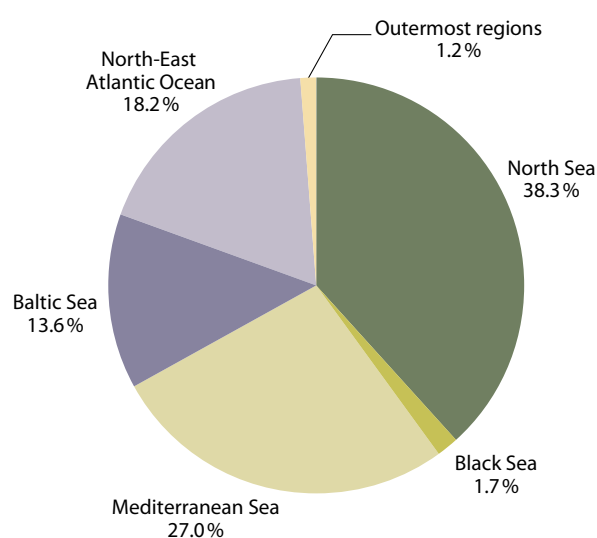
**Map 13.2:** Total gross weight of maritime goods handled in EU coastal regions, by NUTS 3 regions, 2010 <sup>(1)</sup> (million tonnes)



<sup>(1)</sup> Ireland, Spain, France and the United Kingdom, 2009.

Source: Eurostat (online data code: [mar\\_go\\_aa](#))

**Figure 13.1:** Maritime goods handled in EU coastal regions, by basin, 2010 <sup>(1)</sup>  
(% share of total, in terms of gross weight)



<sup>(1)</sup> Ireland, Spain, France and the United Kingdom, 2009.  
Source: Eurostat (online data code: [mar\\_go\\_aa](#))

the impact of the financial and economic crisis. For most of the Member States shown in Table 13.1 the rate of change is shown between 2007 and 2010, and therefore reflects the beginnings of the recovery after the crisis. Nevertheless, Lithuania, Malta, Poland, the Netherlands and Estonia were the only Member States to record higher levels of maritime freight in 2010 than in 2007, while Greece, Romania and Denmark reported maritime freight transport was at least 20% lower in 2010 than 3 years earlier (a similar decline was recorded in Ireland from 2007 to 2009).

Figures 13.2 and 13.3 provide an analysis of maritime trade in each Member State's coastal regions, separating inward and outward freight transport. The important role of the Netherlands as a point of entry into the EU for maritime trade can be seen clearly, as it ranked first in terms of inward maritime freight transport, but third in terms of outward transport; the reverse situation was observed for the United Kingdom. Among the smaller Member States, the position of Latvia was remarkable, having the ninth largest outward maritime transport of freight, whereas it ranked in position 21 for inward transport. There were also relatively large differences in the rankings between inward and outward maritime freight transport for Ireland and Estonia. In the vast majority of Member States, the quantity of inward maritime freight transport handled in its coastal regions exceeded the quantity of freight moving in the opposite direction: only in the Baltic Member States, Poland and Romania were the quantities of outward maritime freight transport greater than inward maritime freight.

## Maritime passenger transport

The total number of maritime passengers in or out of EU-27 ports in 2010 was 395.6 million. The number of passengers embarking or disembarking in EU ports fell relatively strongly in 2009 (-2.2%) and 2010 (-2.0%) following on from a smaller fall (-0.3%) in 2008.

Figure 13.4 summarises the distribution of maritime passengers, based on sea basins, and can be contrasted with Figure 13.1 which provided a similar analysis for maritime freight transport. The Mediterranean Sea basin dominated maritime passenger transport, accounting for more than half (52.2%) of all passengers along the EU's coast. The next largest share was for the Baltic Sea, followed by the North-East Atlantic Ocean and then the North Sea — the latter therefore had a substantially lower share of maritime passenger transport than maritime freight transport. There is practically no maritime passenger transport in the EU coastal regions of the Black Sea: neither of the NUTS level 3 regions in Romania reported any passenger transport, while only one of the Bulgarian regions (Varna) reported a minimum number of passengers (1 000).

By far the largest number of passengers transported by sea in 2010 was recorded by the Attiki region of Greece (43.8 million), where the port of Piraeus is the main gateway for passengers to the Greek islands. The second highest number of passengers was recorded in Napoli with 23.4 million. Six more regions recorded more than 10 million maritime

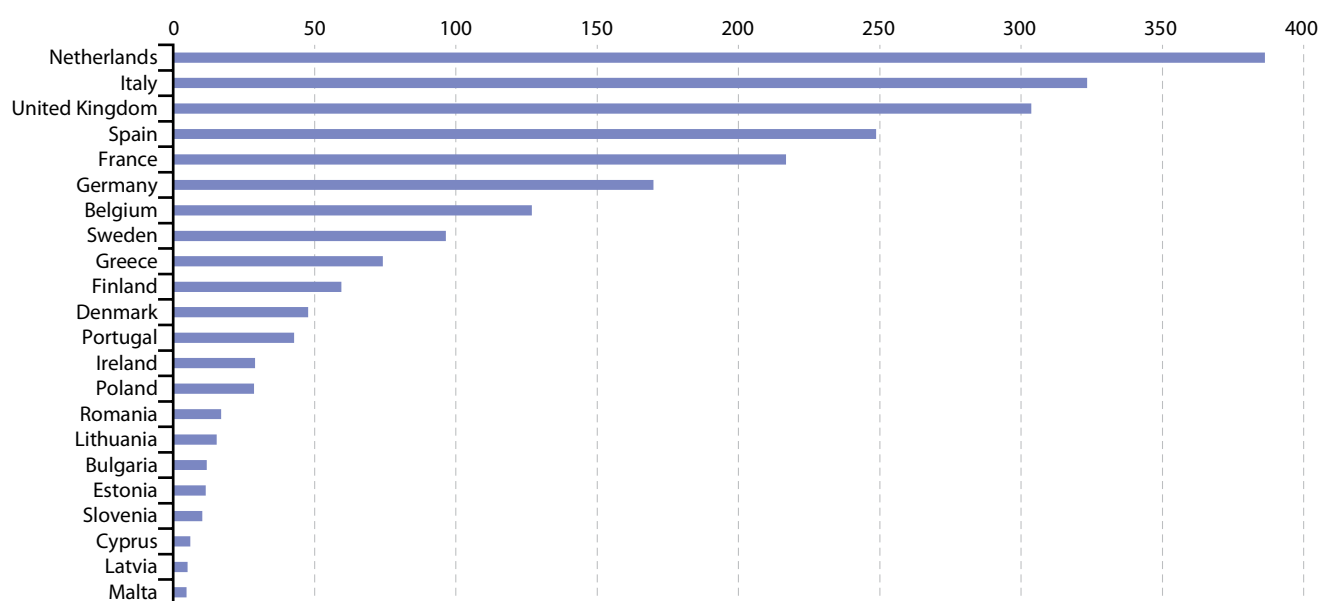
Table 13.1: Maritime goods handled in EU coastal regions <sup>(1)</sup>

	Gross weight of goods handled, 2010 (million tonnes)	Change in gross weight of goods handled, 2007–10 (%)	Coastal region (NUTS 3 regions) with the highest gross weight of goods handled, 2010	Port with the highest gross weight of goods handled, 2010
<b>EU-27</b>	3 641.0	–7.5	Groot-Rijnmond (NL335)	Rotterdam
<b>Coastal regions:</b>				
<b>EU-27 coastal regions</b>	3 544.8	–9.4	Groot-Rijnmond (NL335)	Rotterdam
Belgium	226.6	–3.2	Arr. Antwerpen (BE211)	Antwerpen
Bulgaria	22.9	–7.8	Burgas (BG341)	Burgas
Denmark	87.1	–20.6	Syddjylland (DK032)	Fredericia (og Shell-Havnen)
Germany	272.0	–12.5	Hamburg (DE600)	Hamburg
Estonia	44.1	5.9	Põhja-Eesti (EE001)	Tallinn
Ireland	41.8	–22.7	Dublin (IE021)	Dublin
Greece	122.9	–24.5	Attiki (GR300)	Agii Theodori
Spain	359.4	–14.9	Cádiz (ES612)	Algeciras
France	315.5	–8.9	Seine-Maritime (FR232)	Marseille
Italy	487.1	–9.1	Reggio di Calabria (ITF65)	Genova
Cyprus	7.0	–7.5	Kýpros (CY000)	Limassol
Latvia	58.7	–1.7	Riga (LV006)	Riga
Lithuania	37.9	29.4	Klaipėdos apskritis (LT003)	Klaipėda
Malta	6.0	14.3	Malta (MT001)	Marsaxlokk
Netherlands	538.7	6.2	Groot-Rijnmond (NL335)	Rotterdam
Poland	59.5	13.5	Trójmiejski (PL633)	Gdańsk
Portugal	65.9	–3.4	Alentejo Litoral (PT181)	Sines
Romania	37.3	–23.4	Constanța (RO223)	Constanța
Slovenia	14.6	–8.0	Obalno-kraška (SI024)	Koper
Finland	105.9	–5.9	Itä-Uusimaa (FI182)	Skoeldvik
Sweden	133.3	–26.2	Västra Götalands län (SE232)	Göteborg
United Kingdom	500.8	–13.9	North and North East Lincolnshire (UKE13)	Grimsby and Immingham

<sup>(1)</sup> Ireland, Spain, France and the United Kingdom, data for 2009 and growth rates for 2007–09; EU-27 coastal regions, latest period calculated using the information available for each Member State (either 2009 or 2010), with the growth rate (2007–10) also based on this aggregate.

Source: Eurostat (online data code: [mar\\_go\\_aa](#))

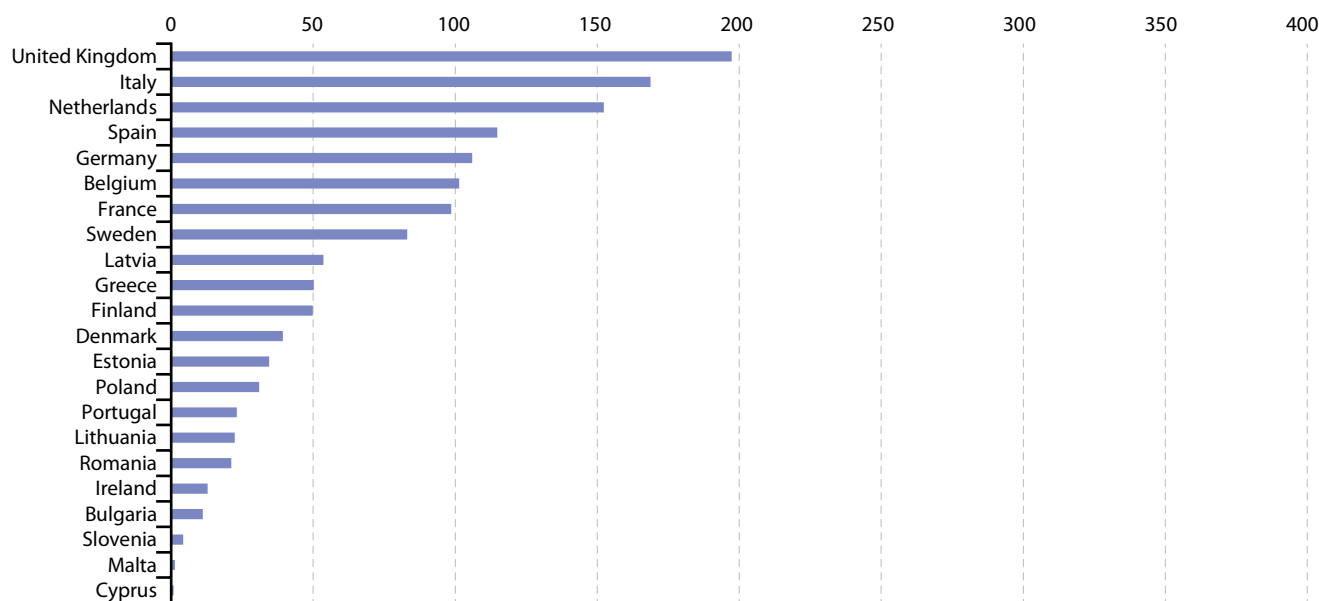
**Figure 13.2:** Gross weight of maritime goods handled in EU coastal regions, inwards, 2010 <sup>(1)</sup>  
(million tonnes)



<sup>(1)</sup> Ireland, Spain, France and the United Kingdom, 2009.

Source: Eurostat (online data code: [mar\\_go\\_aa](#))

**Figure 13.3:** Gross weight of maritime goods handled in EU coastal regions, outwards, 2010 <sup>(1)</sup>  
(million tonnes)

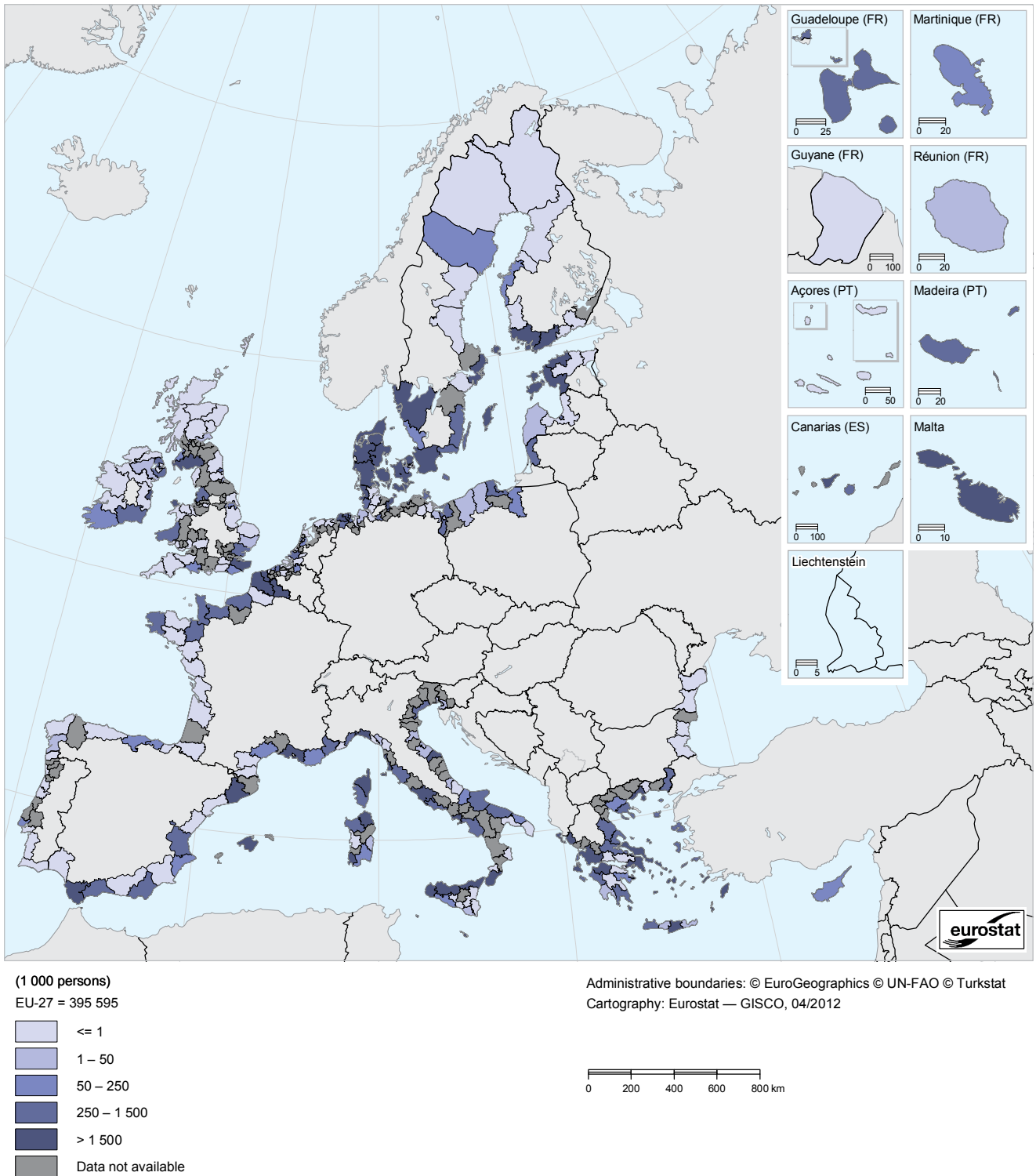


<sup>(1)</sup> Ireland, Spain, France and the United Kingdom, 2009.

Source: Eurostat (online data code: [mar\\_go\\_aa](#))



**Map 13.3:** Maritime passengers in EU coastal regions, by NUTS 3 regions, 2010 <sup>(1)</sup>  
(1 000 persons)

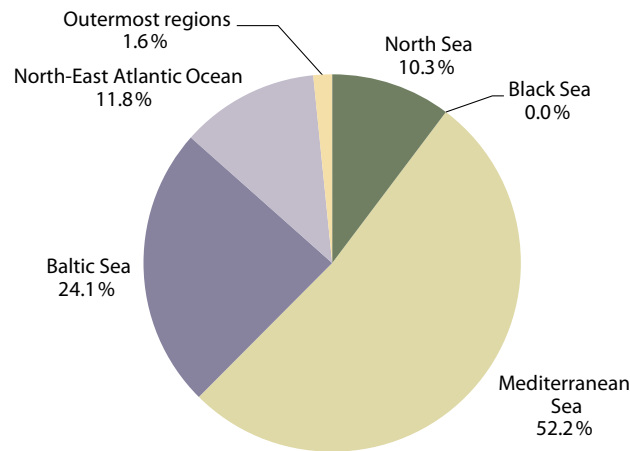


<sup>(1)</sup> Ireland, Spain, France, Malta and the United Kingdom, 2009.

Source: Eurostat (online data code: [mar\\_pa\\_aa](#))



**Figure 13.4:** Maritime passengers in the EU, by basin, 2010 <sup>(1)</sup>  
(% share of total)



<sup>(1)</sup> Ireland, Spain, France, Malta and the United Kingdom, 2009.  
Source: Eurostat (online data code: [mar\\_pa\\_aa](#))

passengers in 2010 including Kent (13.4 million, 2009) and Pas-de-Calais (10.5 million, 2009) reflecting services across the English Channel principally between the ports of Dover on the English side and Calais on the French side. The other regions over 10 million passengers were: Messina (Sicily, Italy) which services several ferry connections to the mainland of Italy as well as ferry routes to Malta and Tunisia; the Swedish regions of Skåne län and Stockholms län, servicing a large number of ferry connections to the other countries around the Baltic Sea; the Danish region of Vestog Sydsjælland, with ferry connections to other parts of Denmark and to neighbouring Germany.

Figure 13.5 provides an analysis of the regional dispersion of maritime passenger transport for all of the EU coastal Member States. Maritime passenger transport tends to be concentrated in particular coastal regions within each Member State. Among the Member States with significant maritime passenger transport in multiple coastal regions, at least one coastal region had no significant maritime passenger transport and the coastal region with the highest level of maritime passenger transport normally had a value that was at least double the national average. The most notable levels of concentration in individual regions were in the United Kingdom, Greece, Italy and France, where the number of passengers in the region with the highest level of maritime passenger transport was at least 10 times above the national average for all coastal regions. The one Member State that was an exception to these two general observations was Malta, where maritime passenger transport is dominated by the domestic service between its two regions, the islands of Malta and Gozo, and which therefore have very similar numbers of maritime passengers. Note that Cyprus and Lithuania have only one coastal region, Slovenia has three regions meeting the criteria as a coastal region but only one actually has a coastline,

while Romania and Bulgaria have very low levels of maritime passenger transport and so no regional concentration can be observed.

## Cruise passengers

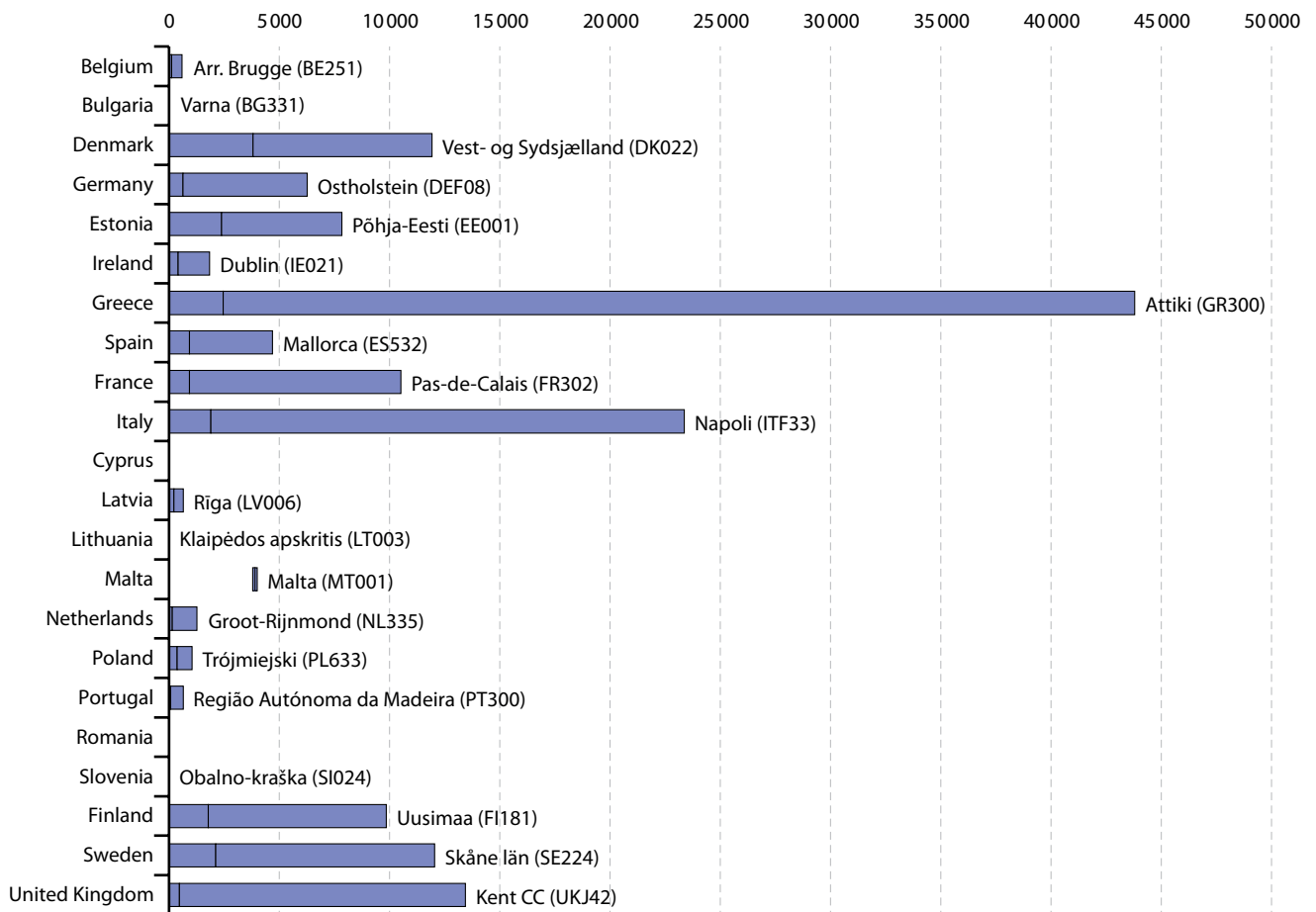
Cruise passengers accounted for around 2% to 3% of all maritime passengers in the EU-27. The total number of passengers starting or ending a cruise in EU-27 ports in 2009 was in excess of 10.5 million, and this figure was nearly 40% above the level in 2007. Early estimates suggest that the number of cruise passengers in the EU-27 fell by around 7% between 2009 and 2010.

Figure 13.6 summarises the distribution of cruise passengers, based on sea basins, and can be contrasted with Figure 13.4, which provided a similar analysis for all maritime passenger transport. The dominance of the Mediterranean Sea basin, which was apparent for all maritime passenger transport, was even greater when restricted to cruise passengers, accounting for approximately two thirds (66.5%) of all cruise passengers in the EU. The North-East Atlantic Ocean also had a larger share of cruise passengers (13.8% compared with 11.8% for all maritime passengers), as did the outermost regions (2.3% compared with 1.6% for all maritime passengers). The share of the Baltic Sea was just 10.2% for cruise passengers, less than half its share of all maritime passengers.

The largest number of cruise passengers was reported for the coastal region of Barcelona, with 1.3 million passengers in 2009. While Barcelona was the only NUTS level 3 coastal region in the EU-27 where the number of cruise passengers exceeded 1 million, there were six other regions with more than half a million passengers, four of them in Italy (Venezia, Savona, Genova and Napoli) and one in Spain (Mallorca),



**Figure 13.5:** Maritime passengers in EU coastal regions, by NUTS 3 regions, 2010 <sup>(1)</sup>  
(1 000 persons)



<sup>(1)</sup> The graph shows the range of the highest to lowest region for each country; the black vertical line is the average (mean); the name of the region with the highest value is also included. Ireland, Spain, France, Malta and the United Kingdom, 2009.

Source: Eurostat (online data code: [mar\\_pa\\_aa](#))

while Southampton (classified to the North-East Atlantic Ocean) in the United Kingdom was the only region with more than half a million cruise passengers that was not on the Mediterranean coast. The next largest cruise passenger numbers were in the Danish capital city region of Byen København and the German region of Kiel, Kreisfreie Stadt, both classified to the Baltic Sea region and having just over 300 000 cruise passengers each in 2010. Hamburg (Germany) completed the top 10 and had the largest number of cruise passengers (216 000) of any coastal region on the North Sea. The largest number of cruise passengers among the outermost coastal regions was 122 000 in Tenerife (Spain). Varna in Bulgaria was the only Black Sea region in the EU to record any cruise passengers (1 000 in 2010).

## Tourism in coastal regions

In the EU-27 as a whole there were around 28.1 million bed places in hotels, campsites and other collective tourist

accommodation in 2009, of which nearly three fifths were in coastal regions. Table 13.3 shows the availability of tourist accommodation in the coastal regions of each of the Member States, while Figure 13.7 summarises this across the various sea basins. EU coastal regions around the Mediterranean Sea offered 7.1 million bed places in 2010, some 43.2% of the total among all coastal regions in the EU-27. The second largest amount of tourist accommodation available was along the coast of the North-East Atlantic Ocean, with 4.9 million bed places. At a national level, the coastal regions of France, Italy, the United Kingdom and Spain had by far the greatest number of bed places available for tourist accommodation, collectively accounting for 71.9% of the total in EU coastal regions. The type of accommodation offered varied greatly between Member States, with the proportion of bed places in hotels over 80% in Latvia, Ireland, Greece, Bulgaria, Cyprus and Malta, but below 25% in the Netherlands, Poland, Denmark and France (where campsites and other collective tourist accommodation dominated).

The single largest number of bed places available in any coastal region in the EU in 2010 was 364 500 in Venezia (Italy), followed by Mallorca and Girona (Spain), Var and Vendée (France) and Cornwall and the Isles of Scilly (United Kingdom), all with more than 250 000 bed places in tourist accommodation. In total, there were 36 coastal regions in the EU-27 that had more than 100 000 bed places available for tourist accommodation, of which 12 were in France, eight in Spain, six in the United Kingdom, five in Italy and one each in Bulgaria, Greece, Portugal, Romania and Sweden.

The density of tourist accommodation can be measured in terms of the number of bed places per square kilometre (km<sup>2</sup>). As well as climatic conditions attracting tourists, visits to coastal regions may also be on account of the attraction of the coast itself, or for cultural or professional reasons. While a lower density of tourism capacity in a region may reflect a relatively less developed tourism infrastructure, it may also simply result from a region having a vast area relative to the length of its coastline, which consequently reduces the density — this explains in part the relatively low tourism density in some regions along the coast of the Baltic Sea, for example, in several Finnish and Swedish regions. As Map 13.5 shows, the density of tourism capacity was high in several regions around the coast of England, peaking at close to 2000 bed places per km<sup>2</sup> in the region of Blackpool on the coast of the North-East Atlantic Ocean. Several NUTS level 3 regions in or around capital cities were among the coastal regions with highest densities of tourist accommodation, including capital city regions in the United Kingdom, Denmark, Malta and the Netherlands. Around the Mediterranean coast the Italian region of Rimini had the highest density of tourist accommodation, 329 bed places per km<sup>2</sup>, followed by Venezia and Malta.

## Data sources and availability

### Coastal regions

A coastal region of the EU is a statistical region defined at NUTS level 3 of the geographical classification that has a coastline or more than half of its population living less than 50 km from the sea. The EU-27 has 446 such regions, belonging to the 22 Member States which have a coastline. Of these 446 coastal regions, 372 have a coastline, while 73 meet the second criterion. Lastly, given the strong influence of the sea, the German region of Hamburg has been added to the list.

The 22 Member States which have a coastline are: Belgium, Bulgaria, Denmark, Germany, Estonia, Ireland, Greece, Spain, France, Italy, Cyprus, Latvia, Lithuania, Malta, the Netherlands, Poland, Portugal, Romania, Slovenia, Finland, Sweden and the United Kingdom.

### Maritime transport

Eurostat's regional transport statistics show passenger and freight movements measured in terms of passengers and tonnes. Freight statistics are divided into tonnes of freight loaded and unloaded. Passenger data are divided into passengers embarking and disembarking.

Currently, data on maritime transport are collected under Directive 2009/42/EC on statistical returns in respect of carriage of goods and passengers by sea. This directive provides detailed quarterly data for ports handling more than 1 million tonnes of goods or recording more than 200 000 passenger movements a year. The data collected at port level are then aggregated to NUTS regions.

### Tourism

A system of tourism statistics was established in Council Directive 95/57/EC of 23 November 1995 on the collection of statistical information in the field of tourism. This was amended in 2004 and 2006 and again in July 2011 (although these latest changes will only enter into force for data for the 2012 reference year). More information relating to the data collection exercise is provided in Chapter 7 on tourism.

Tourism statistics in the EU consist of two main components: statistics relating to capacity and occupancy in tourist accommodation, and statistics relating to tourism demand: this chapter presents data on tourism supply and focuses on data for coastal regions. In most Member States, tourism supply data are collected via surveys filled in by accommodation establishments.

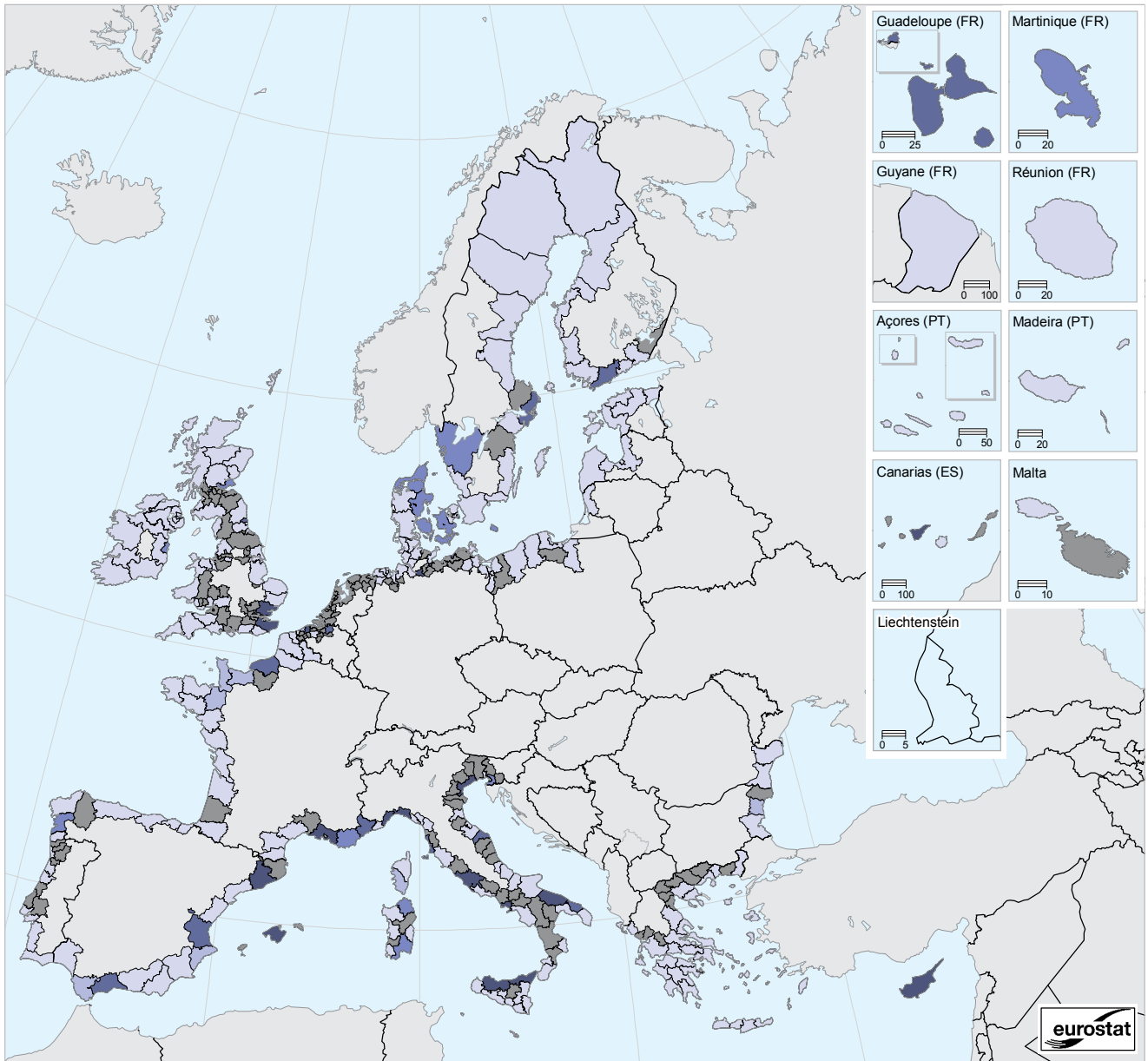
## Context

The EU and EFTA countries have an enormous coastline along the Atlantic and Arctic Oceans and several sea basins: the Baltic Sea, the North Sea, the Mediterranean Sea and the Black Sea. The Atlantic Ocean coastal regions border the Celtic seas on one hand and the Bay of Biscay and the Iberian coast on the other. None of the EU Member States have a coastal region classified to the Arctic Ocean basin. The European Commission's Directorate-General for Maritime Affairs and Fisheries provides more information about each of these sea basins in the [European Atlas of the Seas](#), as well as information about [strategies](#) for each area.

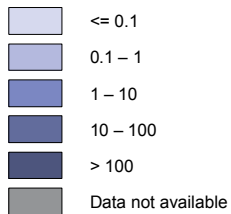
Fishing, shipbuilding, maritime transport, ports and offshore energy-related activities (such as the extraction of fossil fuels and electricity generation) are major coastal and maritime economic activities; furthermore, tourism plays an important role in many coastal economies, while the oceans and seas have important recreational, cultural and ecological functions.



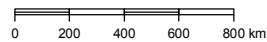
**Map 13.4:** Cruise passengers in EU coastal regions, by NUTS 3 regions, 2010 <sup>(1)</sup>  
(1 000 persons)



(1 000 persons)

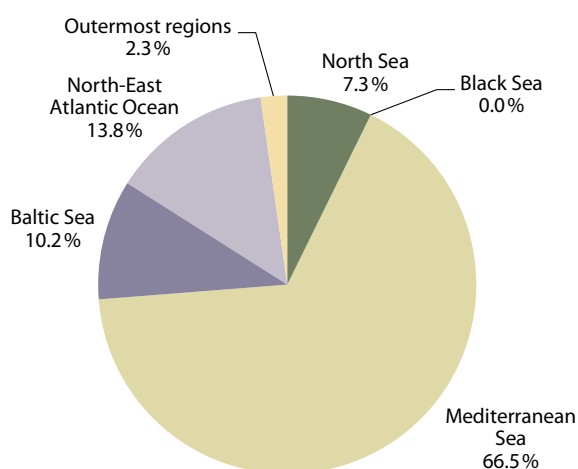


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Cartography: Eurostat — GISCO, 04/2012



<sup>(1)</sup> Ireland, Spain, France, Malta and the United Kingdom, 2009.  
Source: Eurostat (online data code: [mar\\_pa\\_aa](#))

**Figure 13.6:** Cruise passengers in the EU, by basin, 2010 <sup>(1)</sup>  
(% share of total)



<sup>(1)</sup> Ireland, Spain, France, Malta and the United Kingdom, 2009; figures do not sum to 100 % due to rounding.  
Source: Eurostat (online data code: [mar\\_pa\\_aa](#))

**Table 13.2:** Cruise passengers in the EU, by basin <sup>(1)</sup>

	Cruise passengers, 2010 (1 000)	Change in the number of cruise passengers, 2007–10 (%)	Coastal region (NUTS 3 regions) with the highest number of cruise passengers, 2010
<b>EU-27</b>	10 530	39.4	Barcelona (ES511)
<b>Coastal regions:</b>			
<b>EU-27 coastal regions</b>	9 043	20.0	Barcelona (ES511)
North Sea	659	74.3	Hamburg (DE600)
Black Sea	1	-	Varna (BG331)
Mediterranean Sea	6 010	22.9	Barcelona (ES511)
Baltic Sea	924	27.4	Byen København (DK011)
North-East Atlantic Ocean	1 244	11.1	Southampton (UKJ32)
Outermost regions	205	-51.4	Tenerife (ES709)

<sup>(1)</sup> Excluding Estonia, Latvia, Lithuania, the Netherlands and Portugal; EU-27, data for 2009 and growth rates for 2007–09; EU-27 coastal regions, latest period calculated using the information available for each Member State (either 2009 or 2010), with the growth rate (2007–10) also based on this aggregate.

Source: Eurostat (online data code: [mar\\_pa\\_aa](#))





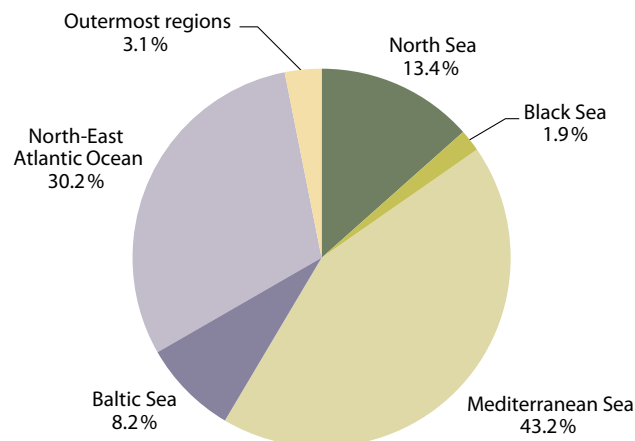
**Table 13.3:** Tourist accommodation in hotels, campsites and other collective tourist accommodation in EU coastal regions <sup>(1)</sup>

	Number of bed places, 2010 (1 000)	Change in the number of bed places, 2007–10 (%)	Share of hotels in the total number of bed places, 2010 (%)	Coastal region (NUTS 3 regions) with the highest number of bed places, 2010
<b>EU-27</b>	28 077.5	2.6	43.8	Venezia (ITD35)
<b>Coastal regions:</b>				
<b>EU-27 coastal regions</b>	16 437.7	3.6	41.3	Venezia (ITD35)
Belgium	117.0	1.9	41.1	Arr. Oostende (BE255)
Bulgaria	180.5	-3.7	89.9	Burgas (BG341)
Denmark	393.4	4.0	20.7	Syddjylland (DK032)
Germany	636.4	10.8	32.4	Ostholstein (DEF08)
Estonia	39.8	11.7	63.6	Põhja-Eesti (EE001)
Ireland	176.7	-16.2	82.6	Dublin (IE021)
Greece	831.2	10.5	89.7	Dodekanisos (GR421)
Spain	2 646.7	4.8	53.4	Mallorca (ES532)
France	3 226.7	1.1	13.4	Var (FR825)
Italy	3 073.9	3.7	45.9	Venezia (ITD35)
Cyprus	88.2	-4.7	95.1	Kýpros (CY000)
Latvia	27.3	32.0	80.5	Rīga (LV006)
Lithuania	10.9	-5.6	50.7	Klaipėdos apskritis (LT003)
Malta	40.2	-1.6	97.4	Malta (MT001)
Netherlands	595.1	0.0	23.1	Overig Zeeland (NL342)
Poland	194.2	-4.2	21.1	Koszaliński (PL422)
Portugal	411.1	2.0	60.3	Algarve (PT150)
Romania	128.9	3.0	72.6	Constanța (RO223)
Slovenia	29.8	25.1	43.6	Obalno-kraška (SI024)
Finland	130.4	-1.0	57.1	Uusimaa (FI181)
Sweden	591.9	6.3	30.2	Västra Götalands län (SE232)
United Kingdom	2 867.2	5.1	41.1	Cornwall and Isles of Scilly (UKK30)

<sup>(1)</sup> EU-27 and France, data for 2009 and growth rates for 2007–09; EU-27 coastal regions, latest period calculated using the information available for each Member State (either 2009 or 2010), with the growth rate (2007–10) also based on this aggregate.

Source: Eurostat (online data code: [tour\\_cap\\_nuts3](#))

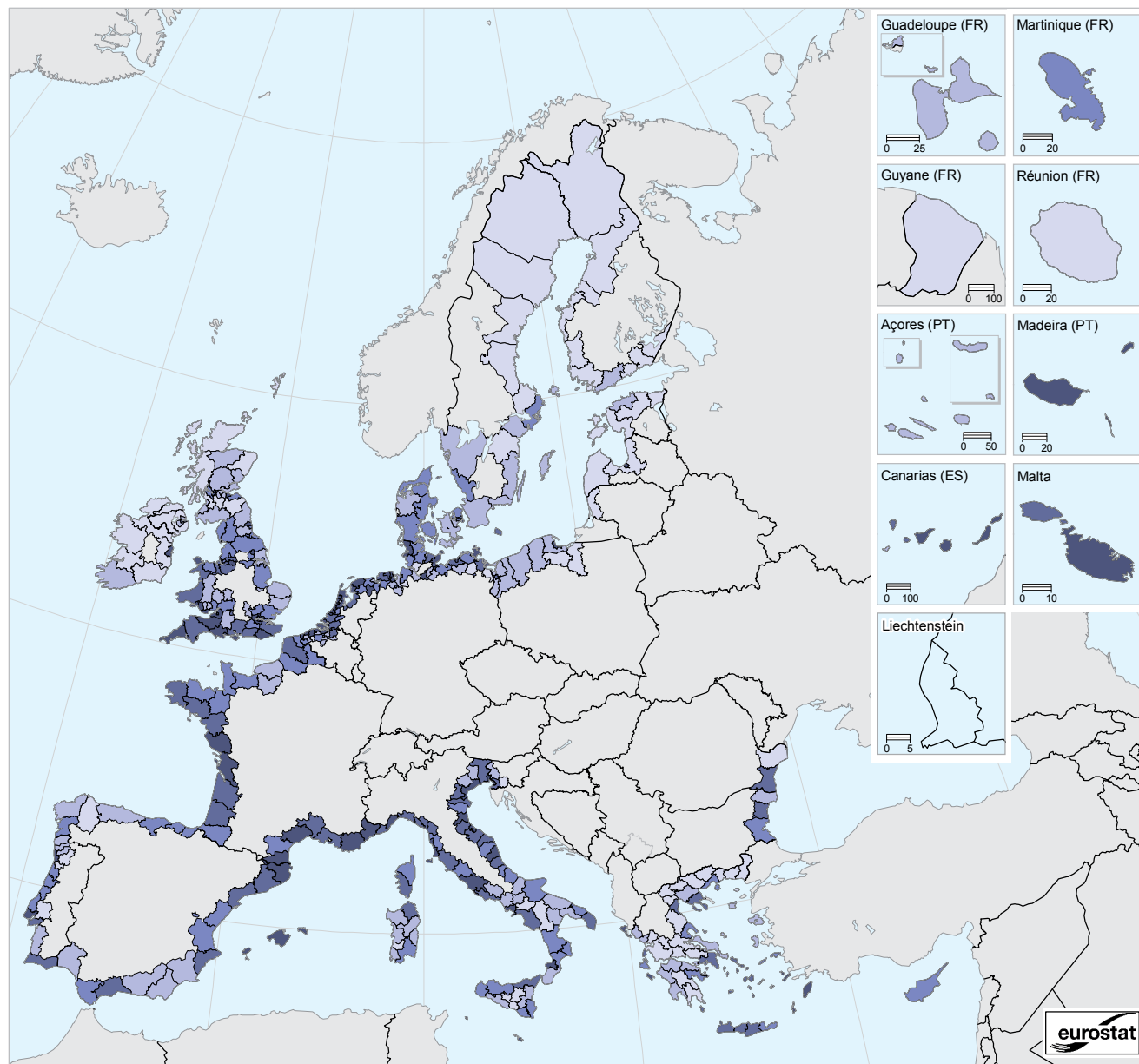
**Figure 13.7:** Bed places in hotels, campsites and other tourist accommodation in EU coastal regions, by basin, 2010 <sup>(1)</sup>  
(% share of total)



<sup>(1)</sup> Includes data for 2009 for France.

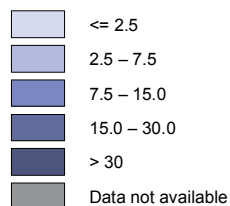
Source: Eurostat (online data code: [tour\\_cap\\_nuts3](#))

**Map 13.5:** Density of tourist accommodation in hotels, campsites and other tourist accommodation in EU coastal regions, by NUTS 3 regions, 2010 <sup>(1)</sup>  
(bed places per km<sup>2</sup>)

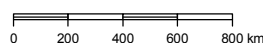


(bed places per km<sup>2</sup>)

EU-27 = 6.53



Administrative boundaries: © EuroGeographics © UN-FAO © Turkstat  
Cartography: Eurostat — GISCO, 04/2012



<sup>(1)</sup> Kiel, Kreisfreie Stadt (DEF02), Stormarn (DEF0F), France and Malta, 2009.

Source: Eurostat (online data codes: [tour\\_cap\\_nuts3](#) and [demo\\_r\\_d3area](#))



## Maritime and coastal policies

Competition for marine space and the cumulative impact of human activities on marine ecosystems require a collaborative and integrated approach to the wide range of policy areas affecting maritime issues. In October 2007, the Commission adopted the Blue Paper launching 'An integrated maritime policy for the European Union' (COM(2007) 574 final). The aims of this policy are to maximise the sustainable use of oceans and seas, enhance Europe's knowledge and innovation potential in maritime affairs, ensure development and sustainable growth in coastal regions, strengthen Europe's maritime leadership and raise the profile of maritime Europe. This policy stresses the importance of coastal regions due to their geographic location and aims to develop sea basin strategies.

The [marine strategy framework directive](#) was adopted in 2008 within the overall context of the integrated maritime policy and aims to protect the marine environment and natural resources and create a framework for the sustainable use of marine waters.

Recommendation 2002/413/EC of the European Parliament and of the Council concerning the [implementation of integrated coastal zone management in Europe](#) defines the principles of sound coastal planning and management and dates from 2002; in other words before the integrated maritime policy. The recommendation was established in response to the perception that coastal planning activities or development decisions were often taken in a sectoral, fragmented way, leading to inefficient use of resources, conflicting claims on space and missed opportunities for more sustainable coastal development. Given the need for coherent planning of coastal and maritime areas, a proposal for a follow-up to the 2002 recommendation is, at the time of writing, being prepared.

## Maritime transport and ports

Maritime transport provides the main mode for EU imports and exports to the rest of the world: around two fifths of the EU's external freight trade is seaborne; short sea shipping

also plays a significant role in intra-EU trade. The quality of life on islands and in peripheral maritime regions depends on maritime transport services.

The EU's maritime transport policies aim to prevent sub-standard shipping, reducing the risk of serious maritime accidents and minimising the environmental impact of maritime transport. EU legislation also concerns working conditions within the maritime transport sector and the protection of consumers' rights.

In 2009, the European Commission updated its '[Strategic goals and recommendations for the EU's maritime transport policy until 2018](#)' (COM(2009) 8). The two main recommendations concerned:

- the ability of the maritime transport sector to provide cost-efficient maritime transport services adapted to the needs of sustainable economic growth of the EU and world economies;
- the long-term competitiveness of the EU shipping sector, enhancing its capacity to generate value and employment in the EU, both directly and indirectly, through the whole cluster of maritime industries.

In October 2007, the European Commission adopted a '[Communication on a European ports policy](#)' (COM(2007) 616), focusing on capacity, freedom of access, competition, flexible employment and the environment. It aims to help concentrate efforts so that the EU's ports can face future challenges, attract new investment and fully contribute to the development of intermodal transport.

## Coastal tourism

Tourism in coastal regions can provide employment opportunities and also contribute to regional development and economic and social integration. In its 2010 communication on tourism (see Chapter 7 for more information) the European Commission recognised the importance of maritime and coastal tourism as a catalyst for economic development and indicated its intention to carry out actions to encourage tourism development as part of an integrated maritime policy.