



Connected Communities • Greece

Ferry transport - A core infrastructure
for an insular country

October 2025



Greece, a country of over 6,000 islands and islets

115 islands are connected to mainland, by ferry operators

89 islands are not connected via aerial routes



A vital connectivity pillar for island accessibility 365 days a year...



...ensuring transport of the majority of freight units' traffic

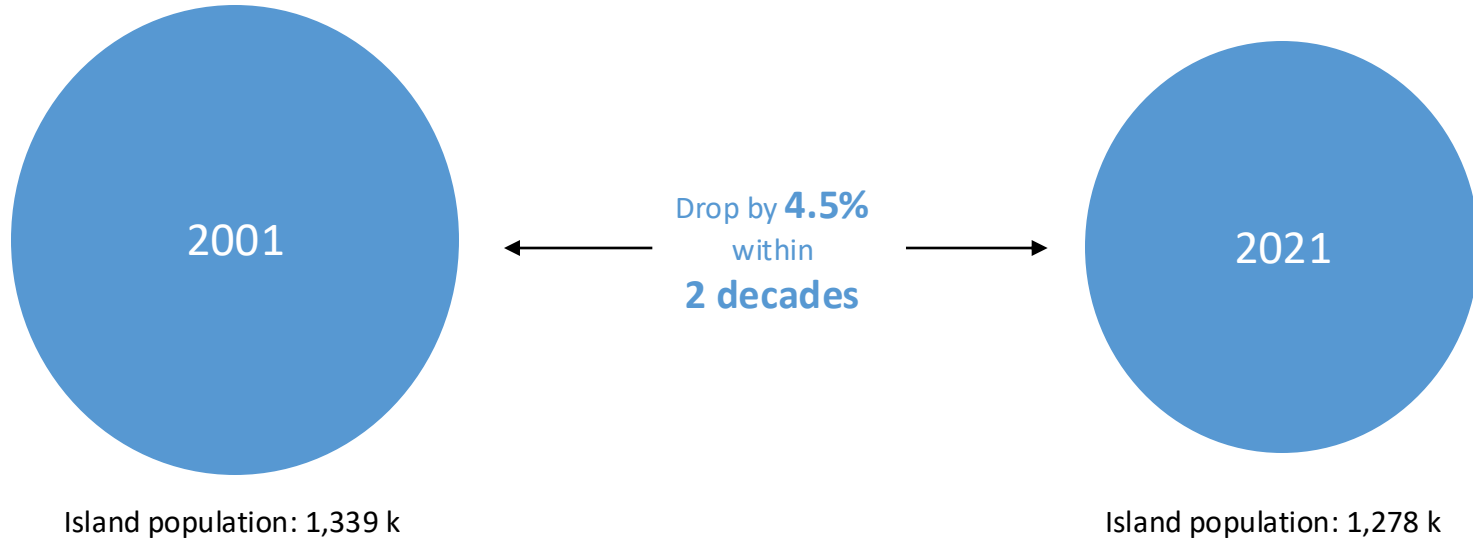


...and transportation of touristic flows to the islands.



Ferry transport is a core infrastructure for economic and social growth.

Greek islands are home to **12.2%** of the country's population



**Connectivity is vital for the islands
Social Cohesion and Economic Growth**

Greek ferry market is the **2nd largest passenger ferry market in the EU**
A country with a unique need for sea transportation



Handling of
17.9%
of European passenger traffic,
compared to **Greece's 2%**
Share of the EU population.



5.4%
Contribution
to **Greek GDP**
(11.8 billion euros)

Transportation of :



20.3 m
passengers

(excluding short coastal routes)



4.5 m
vehicles and
freight units



82%
of Goods
and Supplies
of the islands

Attica Group is a key pillar for the islands' connectivity

DOMESTIC ROUTES			INTERNATIONAL
 ANEK LINES	 HELLENIC SEAWAYS	 Blue Star Ferries	 SUPERFAST FERRIES
6	13	11	7

4 BRANDS:

37 VESSELS:



7.3m passengers / year



1.3m vehicles / year



530,000 freight Units



+ 3,000 employees, largest employer of Greek seafarers of all vessels categories



2.7m nautical miles ~ 123 times around the earth per annum



+50 destinations | **71** ports



Challenges of the Greek Islands' Connectivity

Market **Structural**
Characteristics

Ferry Routes **Network**

Port Infrastructure

Green Transition &
Fleet Renewal

- **33 ferry operators:**

3 large | 4 medium | 26 small sized companies

- **153 vessels** with average age of **30 years**

- **8 key mainland ports** out of which Piraeus Port accounts for 71% of total traffic

- **145 island ports**

- Island **ports' diverse characteristics** dictate **limitations** on vessels suitability

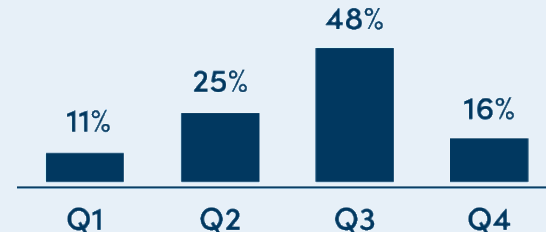
Greek domestic market is characterized by strong **seasonality**:

- **73% of the passengers' traffic** within **6 months** April – September
- Freight traffic presents limited seasonality

Structural limitations in capacity optimization.

Year-round operation of **conventional** vessels
&
Seasonal operation of **highspeed** vessels

Passengers' Traffic Seasonality



An operational challenge emerging from geographical necessity

The large number of scattered islands in the Aegean Sea underpins the necessity for **multi-island route connections** with the mainland.

Unavoidably, a series of challenges emerge as opposed to point-to-point model.

Scheduling

- Prolonged travel time
- Inconvenient arrival/departure times

Complex passenger and cargo management

Continuous embarkation and disembarkation across multiple islands complicates operations and requires precise capacity planning.

Public Service Obligation (PSO) Contracts

for smaller islands that traffic doesn't justify a commercially viable connection.

Only **5%** of the ferry itineraries are compensated by state funds. The total net amount as of 2024 stood at €122 m.

Diverse Route Characteristics

- Traffic volumes
- Travelling time
- Shuttle/Day Ferry/Night Ferry
- Combination of commercial and PSO destinations
- Inter-island traffic

Shuttle Service Piraeus to Aegina

Distance: 17 nautical miles
Time to destination: 40 min
Frequency: ~ 20 itineraries daily
Passenger traffic: 2,333,149
(from/to Aegina)



Medium Range, Highly Touristic Piraeus to Naxos

Distance: 105 nautical miles
Intermediate ports: 1
Time to destination: ~6 hours
Frequency: ~ 9 daily in high season
Passenger traffic: 1,158,668
(from/to Naxos)



Long Haul, Commercial & PSO Port Calls Piraeus to Kastellorizo

Distance: 320 nautical miles
Intermediate ports: 10
Time to destination: ~22 hours
Frequency: Twice per week
Passenger traffic: 25,073
(from/to Kastellorizo)



Aging and Inadequate Ports' infrastructure

- Majority of ports are inadequate to respond to modern vessels' size, traffic volumes and ever-increasing number of port calls (i.e the majority of ports have only one berth).
- Lack of passenger terminals and adequate parking space, creating operational complexities during embarkation/disembarkation, exposing passengers to weather conditions.
- Mooring/Unmooring exposed to weather conditions.
- Outdated infrastructure in need of maintenance and upgrade (berths, depth).

Green Transition

- Investments needed for the alignment with EU regulations calling for effective facilitation of green vessels.

Fragmented Port Management

- The majority of the 145 ports is owned by Municipal Port Authorities.



Santorini Port - Greece



Tallin Port - Estonia

Key challenges:

Alignment with EU regulations and gradual introduction of ETS and Fuel EU are estimated to increase the sector's operating costs by **€320m by 2031**.

By 2031 passengers' traffic will drop by **2m (-10,4%)** vehicles traffic by **483k units (-10,8%)**.

Green transition regulatory costs are estimated to increase the **ticket price by 15% to 33%** depending on the destination.

Rising ticket prices are expected to **increase the cost of living** on the islands **disproportionately** to the mainland.

Required investments for Greek passenger fleet renewal are estimated to exceed **€3bn**.

EU & State **funding tools** have been proven **inadequate** to support Green Transition.

Thus, only **large private companies** are investing in Green Transition and Fleet Renewal.

1. Green Transition

Ensure a fair green transition

It is essential that funds generated by the EU regulations are channeled, through the appropriate mechanisms, to support necessary investments, as well as allocation of economic burden between islands and mainland.

2. Ports Infrastructure

Upgrade of Port Infrastructure

A demanding project that calls for cooperation of various stakeholders, long-term strategic planning and effective prioritization, focusing on safety, improved travelers' experience, as well as readiness to facilitate vessels equipped with state-of-the-art technology.

3. Ferry Routes Network Model

Redesigning the ferry routes network

A call for a comprehensive redesign of itineraries to ensure sustainable and resilient island connectivity, in alignment with green transition targets.

Thank You!