Mapping out the future of the container shipping

Intermed : a European challenge

The right tools to prepare a European gateway destiny

Global Liner Shipping Asia
10-11 September 2015

Port de Barcelona

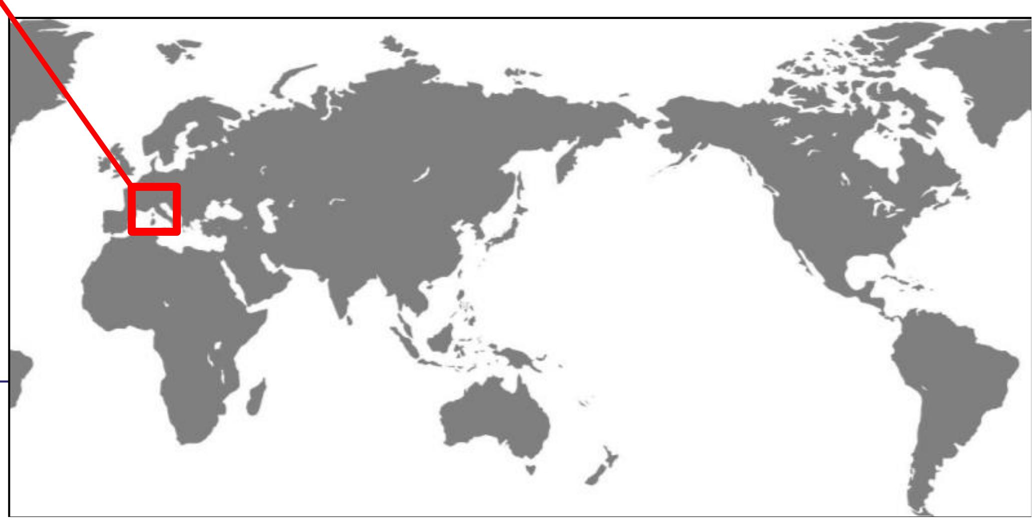
Marseille Fos
Le port euroméditerranéen

Autorità Portuale di Genova

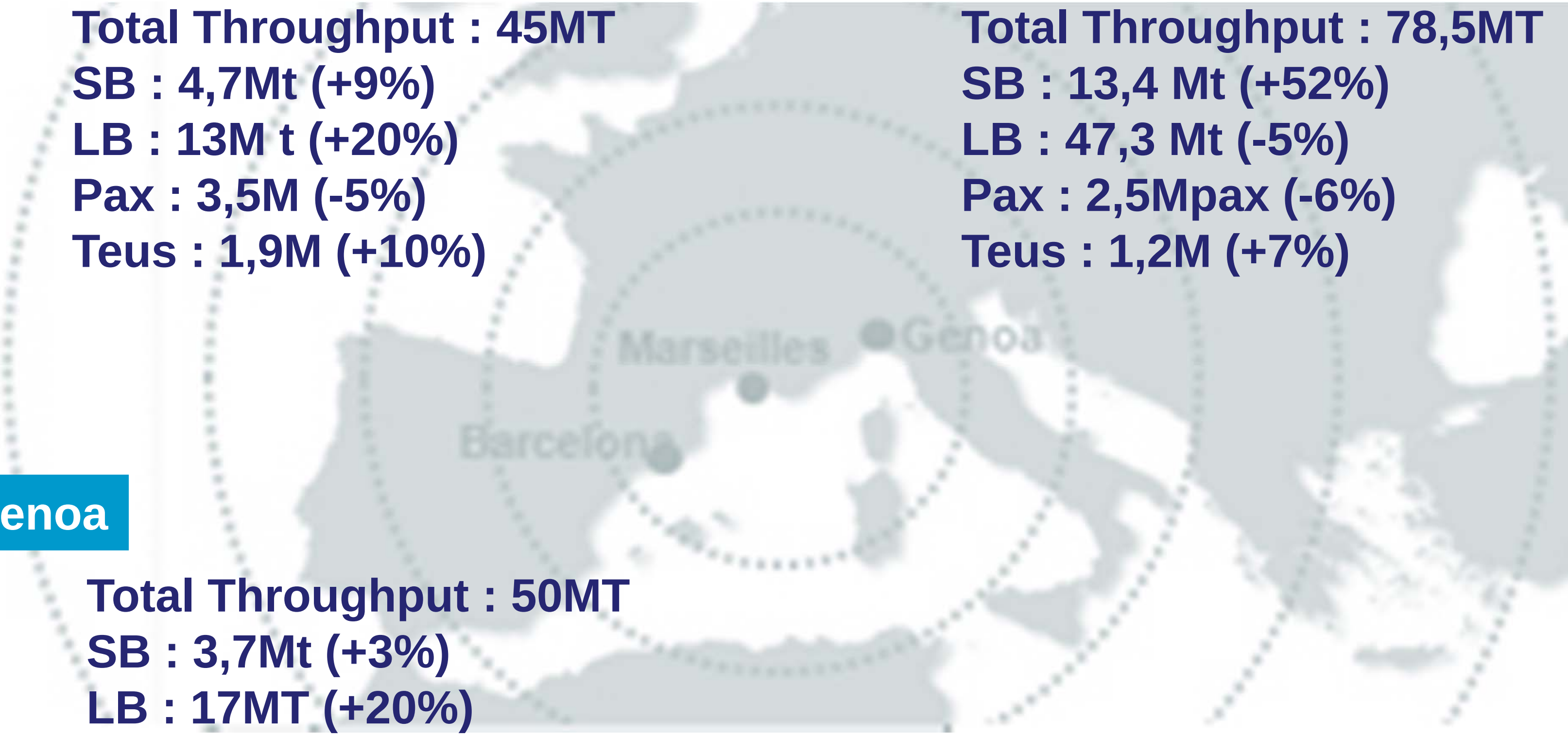
Quick Intermed History

Intermed was founded in 1998 by the ports of Barcelona, Marseille-Fos and Genoa

The main objective of the association is to promote the **role of the three prominent West Med** ports on a **sustainable and more efficient European logistics.**



The three Ports at a glance (2014)



Barcelona

Total Throughput : 45MT
SB : 4,7Mt (+9%)
LB : 13M t (+20%)
Pax : 3,5M (-5%)
Teus : 1,9M (+10%)

Marseille FOS

Total Throughput : 78,5MT
SB : 13,4 Mt (+52%)
LB : 47,3 Mt (-5%)
Pax : 2,5Mpax (-6%)
Teus : 1,2M (+7%)

Genoa

Total Throughput : 50MT
SB : 3,7Mt (+3%)
LB : 17MT (+20%)
Pax : 2,7Mpax
Teus : 2,1M (+7%)

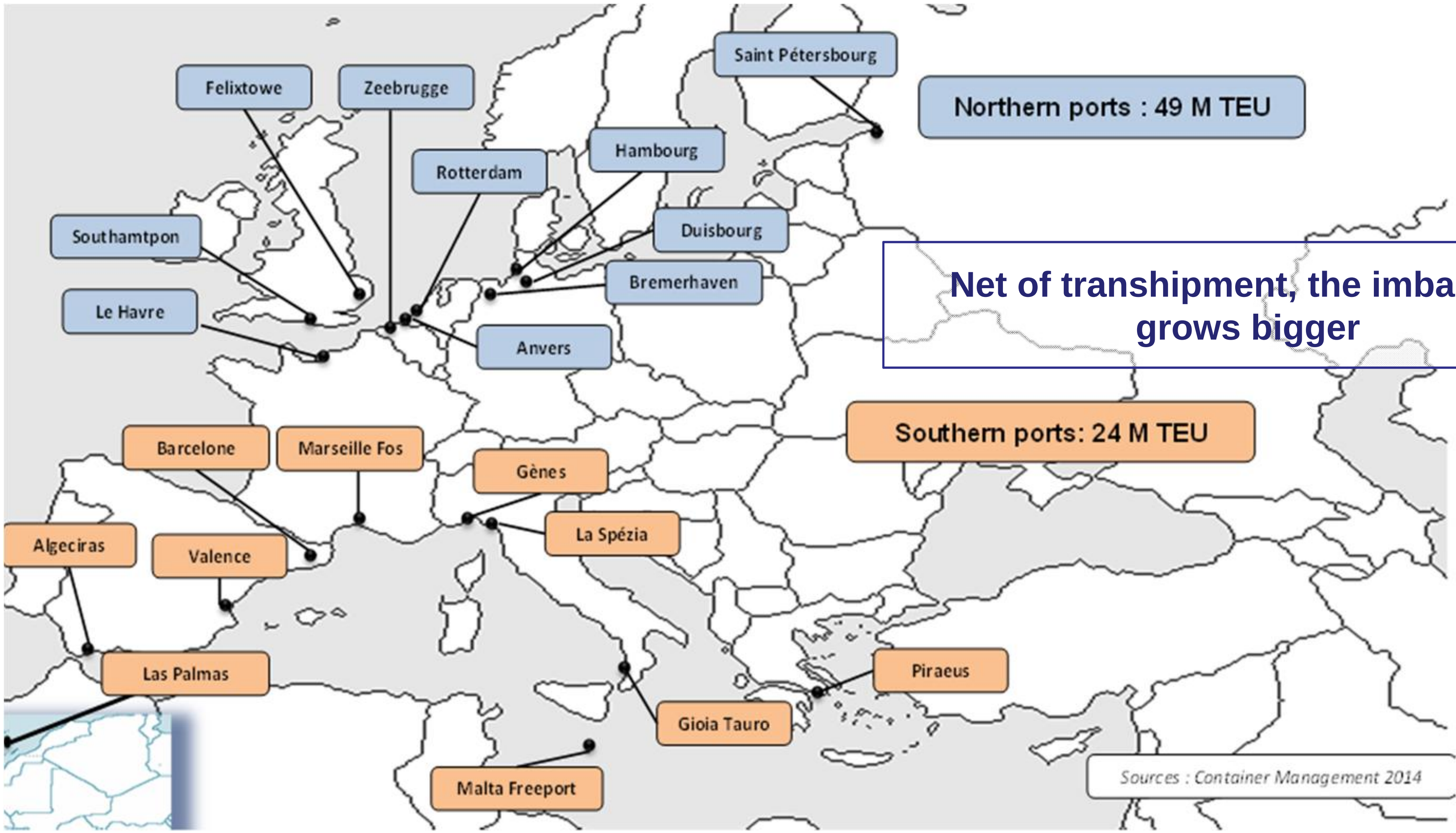
On the international scene, the only way is up

West Med major ports are located at the crossroad of two of the three biggest world container trades Asia / Europe and Europe / Americas

In 2013 the 120 biggest ports in the world manipulated 530 millions TEUS
2014 figures are showing a growth of 5,6% hence a total of 559 M teus
And at more than 1,300 million for 2030 with the same trend (900 million on a trend of 3 %).

→ TEN-T Challenge for European ports
Europe north and south ports reach 78 million teus (15 % of the world total) of which North / South repartition is very unbalanced The three biggest North European ports (Rotterdam / Hamburg and Antwerp) have operated close 40% of the total European TEUs in and out **and 60 % of the so-called North Europe range.**

Container trades: the European imbalance



Net of transhipment, the imbalance grows bigger

The limits of the concentration

Focusing on Asia / Europe container trade :
Bigger and bigger ships (from 10.000 to 18 000 teu-size)
26 loops on Asia Europe / 26 weekly calls in Rotterdam.

The concentration of operations has grown very high in the last few years.
Yet Southern ports are in capacity to operate the biggest ships with high standard of productivity.

The port of the future will have no problem on the sea shore vertical container handling

The port of the future will have to bring solutions to take containers in and out of the gate

The limits of concentration are already experienced on roads / railways / inland platforms in the Northern range
Clients want alternative network solutions

The European Southern Alternative

European supply chain flows have to define a new network mapping including the Southern gateway alternatives.

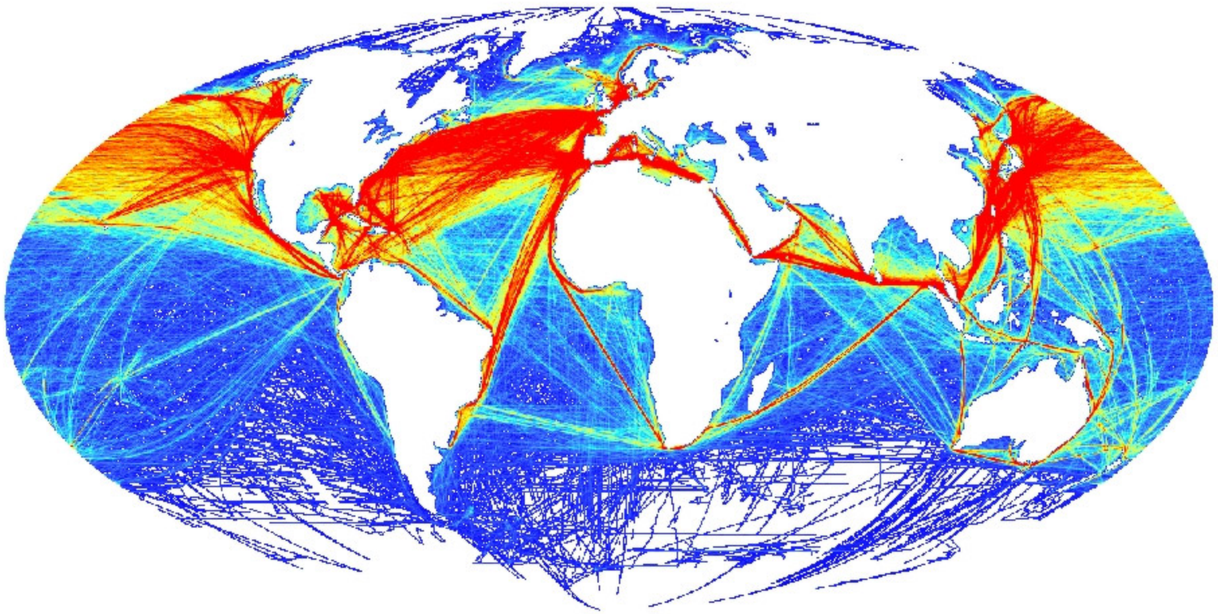
Fluidity and efficiency in our consolidated network, competitiveness of our flows can only increase if we consider the **European market as a platform with DOUBLE ENTRY.**

At the center of this strategy : **proactivity and productivity**

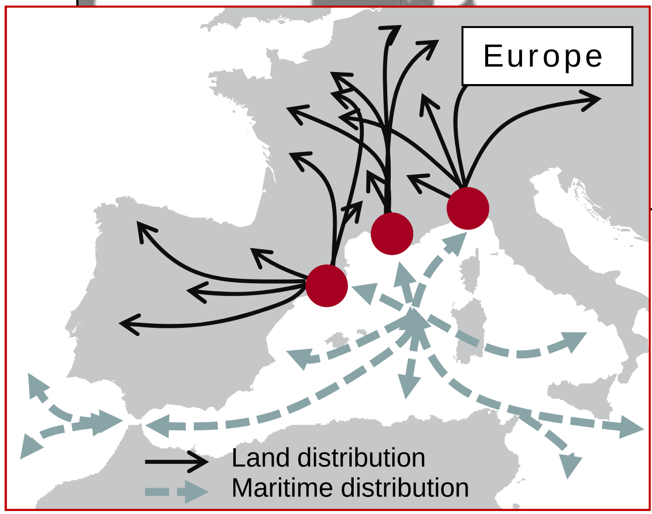
The right infrastructure for each core traffic
Multimodal diversified routes on short and long distance with a strong incentive to massification
Dedicated and efficient logistic solutions
Facilitation and dematerialization of administrative formalities

Structural changes in Logistics (Asia-Europe)

- **Logistics "mega-operators"**
- **Lead time structural change**
- **Inland distribution costs vs. Overseas freight**
- **New Suez Canal**
- **Environmental restrictions (sulphur limitations in North Sea, taxes on road transportation, etc.)**
- **Congestion in North Europe (3-4 days to on the inland connection relay)**
- **Cascading effect bringing new capacity on Med routes**
- **Giving the shippers the choice of options for optimal supply chain solutions**



The potential of Mediterranean ports on the world main trade routes

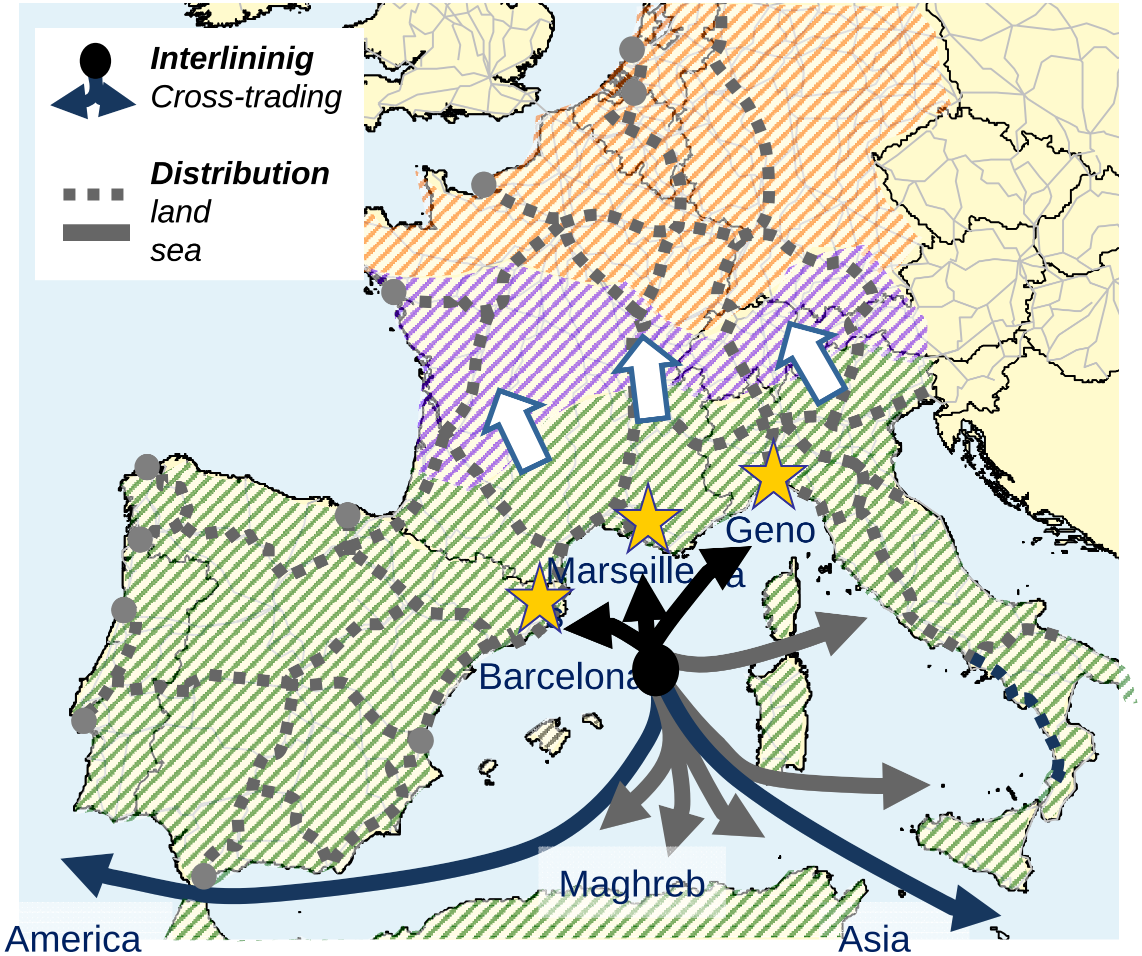


- Med ports are efficient European gateways on the southern alternative.
- Shortsea volumes are on a fast growing trend on intermed sector.
- Reduction of navigation days, Sox and Noc emissions are reduced by 15 %vs North European routes.
- Slowsteaming: transit time gains on door to door through Med entry
- Less congestion than in Northern European infrastructures and flexible windows
- Good combination of voljumes withNorth and West African potential
- Reduction of logistics turnover costs

The Intermed perspective

Today Mediterranean Ports are ready:

Intermed Ports have done their job and have today equivalent levels of service than their competitors



Increased port capacity

+

Efficient services

+

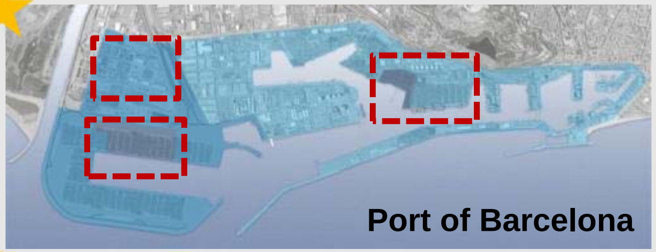
Connectivity services

Sea & Land

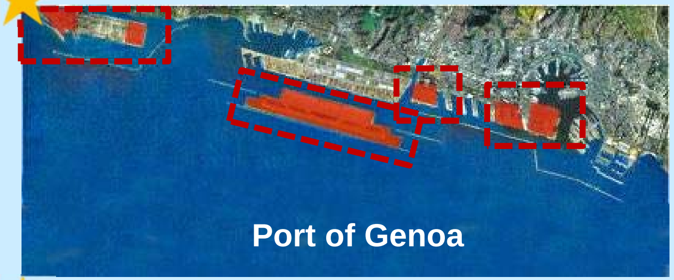
Increased port capacity

Today Mediterranean Ports are ready:

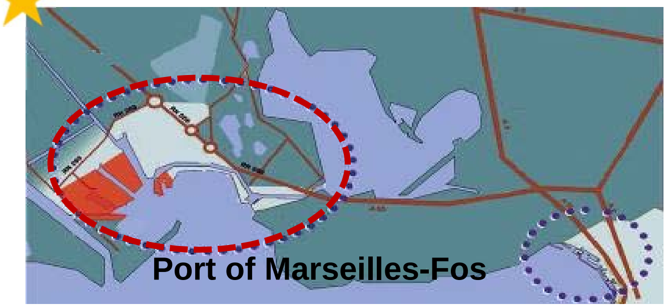
Enlargement processes to increase port & logistics areas and loading capacities



- Seawalls enlargement completed
- New land areas. Port area doubled
- Expansion of the two container terminals 2012 & 2013.
- Increase of capacity: from 2.6 MTEU to 4.5 MTEU. 10 MTEU in 2020
- Extension of Logistics Area ZAL. From 65 ha to 145 ha
- New road and rail infrastructures



- Reclaiming of Bettolo Pier: 18 ha. Capacity 550,000 TEU
- Reclaiming of Ronco Pier: 6.4 ha
- Construction of new breakwaters
- New road and Rail infrastructure



- 2012 Fos capacity 2 to 2.5 MTEU
- Fox 3 XL / Fos 4 XL development capacity
- 2012-2015: extension of logistic capacities: +100 ha
- New rail connections and river shuttles. Quick growth of mutimodal

In 2015, Barcelona, Marseille-Fos and Genoa offer a total capacity of more than 17 million TEU

Efficient services

intermed GATEWAYS PORTS barcelona marseille genoa

Today Mediterranean Ports are ready:

Efficient port performance: Intermed ports added value services

Barcelona

EFFICIENCY NETWORK Port de Barcelona	**Quality brand** of the Port of Barcelona.
PORTIC	**Port Community System** of the Port of Barcelona. Technological platform that provides an easier interaction
Logistics Consultancy Port de Barcelona	**Logistics consultancy for customers** that want to improve their logistics, proposing more competitive alternatives.

Marseille-Fos

AP+	**Port community system** "AP+". Access to AP could be done directly or via a network of port, river, inland platforms.
med link ports la solution logistique	**Network of multimodal transport platforms** established . Partnership agreement Port of Marseille Fos & 9 inland Ports
BIP	New **Border Inspection Post** (2012) in the eastern harbor of the port of Marseille-Fos. A better fluidity and a better inspection are guaranteed as it is already the case in the western harbor (Fos).

Genoa

PEAP GENOVA Piano Energetico Ambientale Portuale	The Energetic and Environmental Port Plan (PEAP) is a tool aimed at orienting and **promoting the use of renewable sources at the improvement of energetic efficiency within the port.**
E-port	Genoa Port Authority is in the process of completing a comprehensive **port information system** (using the acronym E-port) developed with the valuable assistance of all the Operators' Associations.
Genoa Fast Corridor TIGER	Genoa Fast Corridor is a **rail transport service operating** between the Voltri Container Terminal and the Rivalta Scrivia freight village located midway between Genoa and Milan.

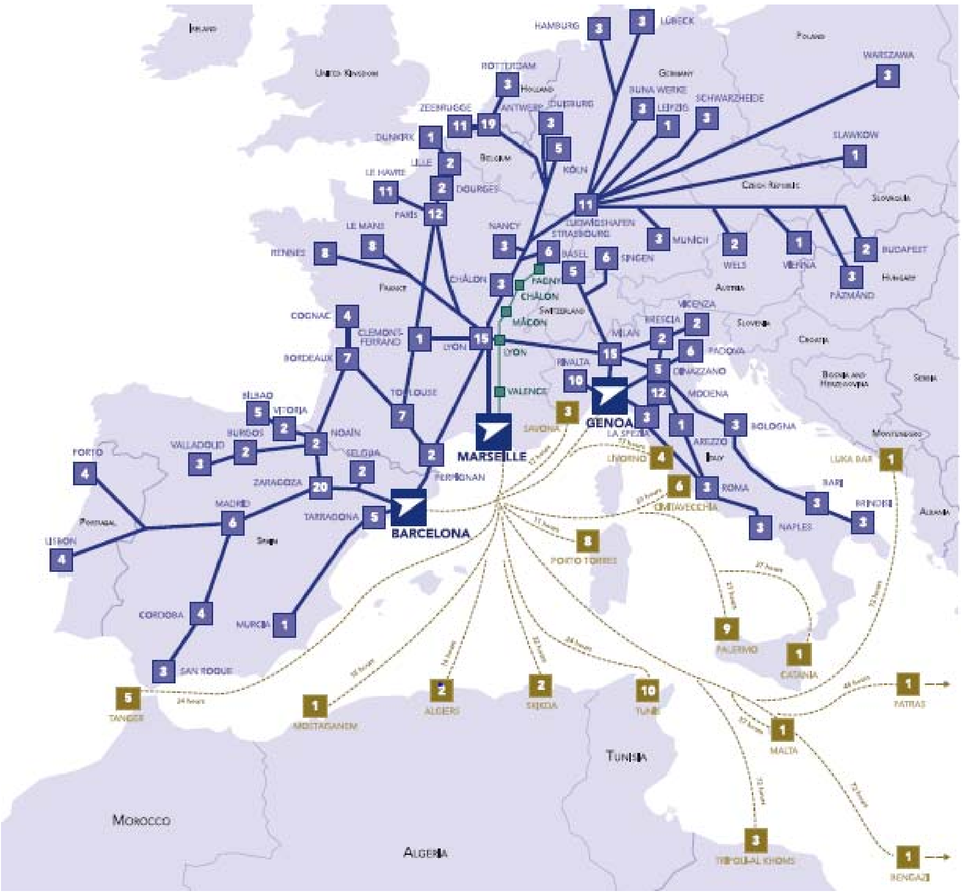
Intermodality & Connectivity Services Sea & land

intermed GATEWAYS
PORTS barcelona marseille genoa

Today Mediterranean Ports are ready:

- New multimodal platforms created in the past and in a near future

- A commitment to railways and long distance potential on non-saturated infrastrures

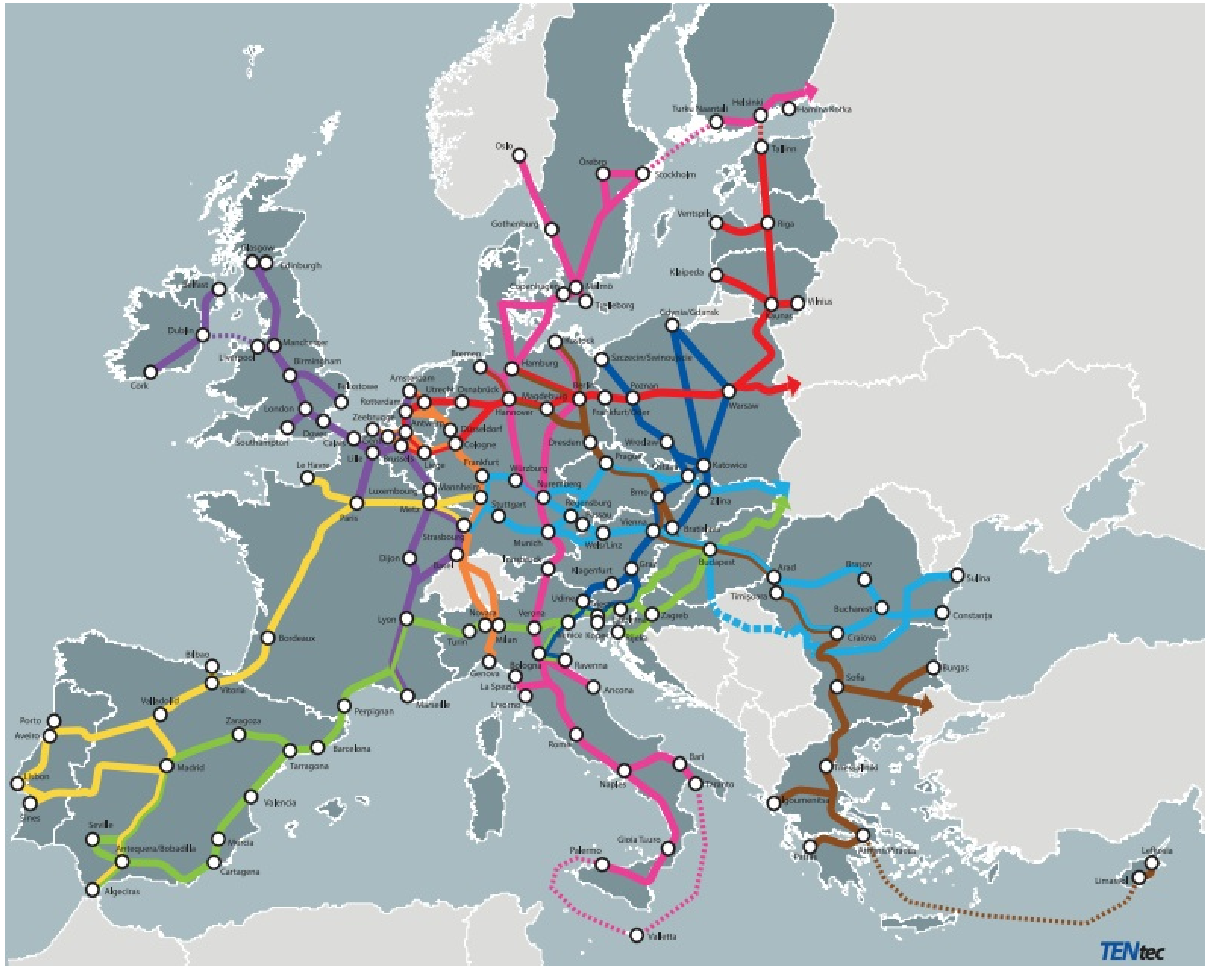


As a result, Rail, multimodal, & combined traffic at Intermed Ports has increased considerably over the last years, due to:

- Investments in multimodal platforms rail infrastructures **made by ports and future envelopes of 150M€**
- Growing supply of services from private sector
- For example, growth of rail volume in teus in Marseilles-Fos has grown 14% in 2014

Supported by European Union

- **Intermed Ports are on the Main European Freight Corridors**



conclusion Message

Thank you
for your attention

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Unstable market in the shipping business

Freight & connectivity volatility

World Container Index's Shanghai-Rotterdam Container Freight Rate (weekly averages, $ per 40ft container)

Note: Excludes terminal handling charges
Source: World Container Index assessed by Drewry, www.worldcontainerindex.com

Container Freight Rate SPOT, all-in, $ 40 ft container

Route	Jan-14	Feb-14	Mar-14	Jan 14-Feb 14	Feb 14 – Mar 14
Asia to Europe	$ 3,411	$ 2,992	$ 2,234	-12%	-25%
Europe to Asia	$ 1,110	$ 1,123	$ 1,152	1%	3%

Source: Drewry Container Freight Rate Insight

Fuel price increase

Environmental considerations

Bigger vessels

Inland transport involvement

Slow steaming

Concentration (carriers and terminals)


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China may pilot carbon tax in shipping industry

Updated: 2012-10-22 17:08
By Wang Wen (chinadaily.com.cn)

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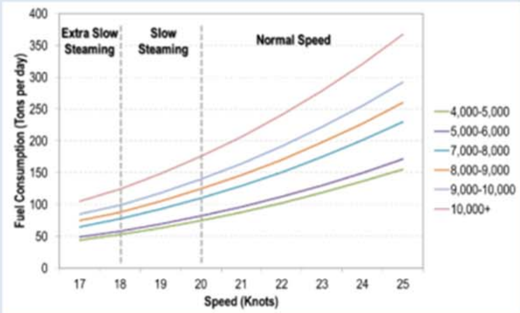
The Ministry of Transport is considering piloting carbon trading or a carbon tax in the domestic shipping business, the Economic Information Daily reported on Monday.

The ministry has researched different market measures to cut carbon emission in China's shipping business, and either carbon trading or a carbon tax may be adopted.

The final plan has yet to be drawn up, but the measures are likely to include slowing down the speed of ships.

According to the newspaper, Zhang Shouguo, deputy president of China Shipowners' Association, warned that if a carbon tax is levied, some weak shipping companies will die as the price of shipping in China had already dropped below the cost.



Notteboom and Carriou 2009

Less bunker costs, less carbon footprint, longer shipping times & more ships on service