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PORTS AND TERMINALS

ESPO PUTS FORWARD COMPROMISE PROPOSAL IN VIEW OF THE TRIALOGUE ON CLEAN FUEL STRATEGY

On 17 December, the Council, European Parliament and Commission are coming together for a first trialogue meeting in view of reaching a first reading agreement on the proposed directive for the deployment of alternative fuels infrastructure.

Two of the issues under discussion are of direct interest for European seaports: the provision of LNG refuelling facilities in core ports and the shore side electricity infrastructure.

Concerning the deployment of LNG refuelling points in ports of the European core TEN-T network, ESPO:

- Is in favour of the pragmatic approach that is currently taken by both European institutions: the aim should be the deployment of a sufficient network of LNG refuelling points taking market realities and distances between ports into account;
- Believes that such an LNG refuelling network needs to be deployed by 2020 in selected core TEN-T ports in order to be in consistency with the entering into force of the sulphur directive;
- Believes, it is of outmost importance that the relevant co-funding possibilities for LNG projects are ensured also after the 2014-2020.

"LNG is to be the most promising medium term solution in view of tackling holistically the environmental performance of shipping.

We cannot deny the coming into force of the sulphur directive.

The 2020 deadline can be supported if it is applied in a pragmatic way and if 2020 does not mean that the radical end of EU co-funding of LNG deployment projects", says ESPO's Secretary General Isabelle Ryckbost.

On shore side electricity ESPO is clearly against any introduction of legal obligations to ports for the provision of this technology.

Port feasibility studies clearly demonstrate that shore side electricity is not a "one-size-fits-all" type of solution and should therefore not be imposed horizontally.

It should be promoted where and insofar it is beneficial for the environment and cost effective.

As a result, ESPO cannot support the result of the TRAN committee vote which introduces a strict obligation for core TEN-T ports to provide shore side electricity to vessels requiring more than 1 MWA in berths located within 3 km of residential areas.

"We cannot support the Parliament's proposals on shore side electricity," says Isabelle Ryckbost, ESPO's Secretary General.

"European ports have been actively supporting this technology and exploring the possibility of providing shore side electricity in their berths.

This has in cases lead to successful implementation projects.

However, in other cases port feasibility studies show a lack of significant environmental benefits and disproportionate high investment costs.

We are therefore convinced that any investment on shore side electricity needs to be justified through local feasibility studies and not imposed through a strict obligation".

(from: allaboutshipping.co.uk, December 17th 2013)

ROTTERDAM BLAZES OUT OF 2013

The Port of Rotterdam's annual results conference is rarely a dull affair and the 2013 event last Thursday (19th December) was no exception, not least because Hans Smits retires as the port's CEO at the end of this year - Allard Castelein was announced as his successor in July.

A few weeks ago Smits received a sarcastic "farewell" letter from the ECT Works Council, which accused him of putting their jobs at risk by giving the go-ahead to the new container terminals on Maasvlakte II.

"We hope your successor understands the port industry better [than you]," Smits quoted from the letter, which in effect wished him "good riddance."

Both the new terminals come on stream next year and will eventually add 6M TEU of new capacity, which can be increased to 10M TEU, but Rotterdam has seen no real growth in the container sector since 1H/2011 and the figure for 2013 is expected to be down by around 200,000 TEU (- 1.7%) compared to 2012.

The dispute between ECT and the port authority could come to a head next year.

All legal preambles have been completed and Smits expects the first court hearings on ECT's €900M claim for loss of future business to begin in mid-2014.

From Smits' perspective, Rotterdam's selling points, great as they are, are not enough to ensure it can stay ahead of the competition in the Le Havre-Hamburg range, taking into account the concentration in the liner sector (G6 and P3) and it has to deal with capacity and efficiency issues.

"During the summer we saw feeder vessels being delayed a few days during peaks."

Rotterdam's share of container traffic in the range fell slightly to 28.4%, while Hamburg staged a strong recovery to 23.6%, due in part to winning back Baltic feeder traffic, which Smits reckoned cost Rotterdam 150,000 TEU in 2013.

A key challenge is to optimise inter-terminal traffic between the container terminals and empty depots on the Maasvlaktes.

The port authority is prepared to invest millions of euros in an internal "bonded" road system with complete grade separation to prevent barge and train "hopping."

"Terminal operators and other parties will have to cooperate despite being competitors if we want to handle calls of 6000 boxes efficiently," said Smits.

"As yet there is no agreement on the type of trailers to be used on the planned internal road." (A multi-trailer train system is the obvious candidate).

Departing after almost 10 years in the "hot seat," Smits again reiterated that a second multi-user rail terminal is needed on the Maasvlakte estate, on Maasvlakte II, along with a new joint control centre to streamline train dispatch from both the Maasvlaktes and optimise their payload.

It is vital that trains are loaded to [near] capacity, said Smits.

Although Germany will finally tackle the rail bottleneck at Oberhausen (investing €1.6B in a grade-separated third track), the construction works are bound to lead to disruption and limit the capacity of the Betuwe Line for container and mineral bulk trains.

The reality is that although the barge share of inland distribution has increased, rail's share has declined and the port is thus approaching a crisis, since the road network in and around Rotterdam simply cannot cope with the anticipated increase in container traffic (4-5% in 2015).

Rotterdam's container train products need to be much more potent, said Smits, to win a bigger slice of the market in Eastern Europe and Southern Germany.

"Hamburg and Bremerhaven have 12 times more rail container shuttles to and from Bavaria than us and in the Czech market the have eight trains for every one on the Rotterdam axis.

"Our unmatched access with the Le Havre-Hamburg range for ULCCs is a great asset, but on its own it is not sufficient."

For the record, containerised tonnage was down 3.1% last year to 121.6 Mt.

In unit terms it was down by 2.1% in containers (to 7.034M containers) and by 1.7% in TEU (to 11.664M TEU).

Other general cargo (breakbulk and ro-ro) was off by 1.8% to 23.34 Mt.

Overall dry bulk traffic increased by 12.7% to 88 Mt, with growth in all sectors (particularly agribulks and coal) and liquid bulks totalled 208.5 Mt (-2.6%).

Overall throughput was thus unchanged at 441.5 Mt.

For 2014, the port is forecasting an overall traffic increase in the 1-1.5% range.

(from: worldcargonews.com, December 21st 2013)

MARITIME TRANSPORT

HAPAG-LLOYD AIMS FOR FURTHER INDUSTRY CONSOLIDATION

Hapag-Lloyd's proposed merger with Chilean shipping line CSAV could be the first of several as the German shipping line tries to close the gap on the world's top three carriers.

According to *Lloyd's List Intelligence*, Hapag-Lloyd has the world's sixth-largest containership fleet with 723,804 teu of capacity.

This lags behind the fleets of Maersk Line, Mediterranean Shipping Co and CMA CGM, which stand at 2.5m teu, 2.2m teu and 1.5m teu.

If Hapag-Lloyd and CSAV merge, the combined entity's fleet would reach just over 1m teu and would be the fourth-largest in the world.

Its fleet would exceed that of Cosco Container Lines and Evergreen Marine, now ranked fourth and fifth.

Hapag-Lloyd chief executive Michael Behrendt said a deal could mark the start of further consolidation as the German shipping line attempts to close in on the top three carriers.

Mr Behrendt is known to support industry consolidation, but he has also outlined the difficulty of achieving this as owners strive to maintain a controlling interest.

Mr Behrendt told Reuters: "The aim should be to create something bigger by merging several companies.

"It is my goal that we can catch up with the top three.

I may not be able to achieve this during my time, but perhaps make a step in that direction."

News of talks between Hapag-Lloyd and CSAV emerged last week.

The discussions are known to be at a very early stage.

However, the talks are not limited to the possibility of a merger; other types of partnership are up for discussion.

“Hapag-Lloyd and CSAV are currently maintaining discussions [to see whether] a possible business combination or any other form of association would be of mutual interest,” the carriers said.

Mr Behrendt also said that Hapag-Lloyd was ready to launch an initial public offering when market conditions improved.

In October, a senior executive of a key minority shareholder said an IPO would not happen before autumn of next year at the earliest.

(from: lloydsloadinglist.com, December 12th 2013)

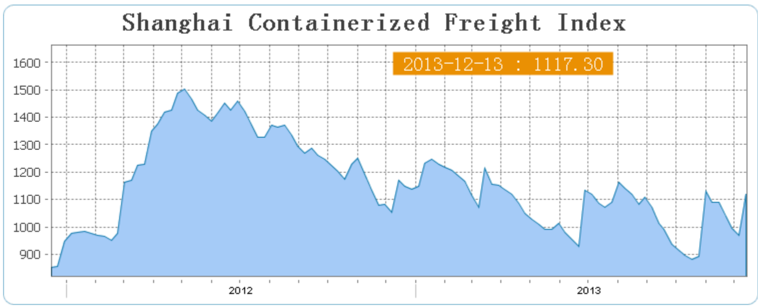
CONTAINER SHIPPING IN 2013 – A GAME OF SNAKES & LADDERS

A quick glance at the Shanghai Containerized Freight Index all-in spot rate graph for Asia-North Europe over the past year confirms one thing: the patient is unstable and in a critical condition.

The year has ended with a final surge of 61% on SCFI spot rates from Asia to North Europe, taking the pre-holidays rate to $1,586 per teu – around $180 higher than the same period a year earlier.

On the face of it – and drawing a graph between the two points – that may not seem too bad, given the sluggish recovery in Europe.

However, closer examination of the SCFI tells a different story – one of extreme volatility, that bears no comparison to any other industry, particularly one in which so many billions of dollars are invested.



It has been a year scarred by extreme volatility in freight rates – there are no better words to describe rate restorations which have totaled more than $6,000 per teu but ultimately only succeeded in maintaining the status quo.

The first quarter of 2013 was characterised by a market share-induced mini rate war to follow the post-Chinese New Year traditional sluggishness, which plunged rates back down below the watershed $1,000 per teu level by the end of February.

They then leapt back up after carriers reacted with a raft of general rate increases pushing the SCFI back over $1,400 by mid-March, only to see those increases eroded and more during the rest of the quarter, culminating in the index touching the bottom of the barrel in June at around $500 per teu.

At this level the carriers were staring into the abyss of bankruptcy by effectively subsidising shippers by as much as $500 per box.

Experience tells us that it is only when carriers are drinking in the Last Chance Saloon do they react sagely; and in further déjà vu GRIs of $1,000 or more were announced and mostly maintained, shooting rates back up to the healthier $1,400 level.

A brief period of discipline ensued until pre-booking information ahead of a weak peak season drove spot rates back down to the danger zone of just over $600 per teu.

The pattern was repeated, with November GRIs at first holding but then week-on-week giving up much of their value, while a recent mid-December GRI has now restored order in the crucial weeks before the next Chinese New Year, due to commences on 31 January.

2013 is rather appropriately the Chinese Year of the Snake.

For carriers and their customers alike it has more been like a game of Snakes and Ladders.

Will the Year of the Horse be a better 12 months for ocean carriers?

Time will tell.

But on a positive note, those EU antitrust commissioners delving into the alleged rate signalling by 14 leading carriers could be somewhat perplexed when studying the SCFI graph – it tracks a perfect example of a market forces-influenced industry at its worst and most vulnerable.

(from: theloadstar.co.uk, December 18th 2013)

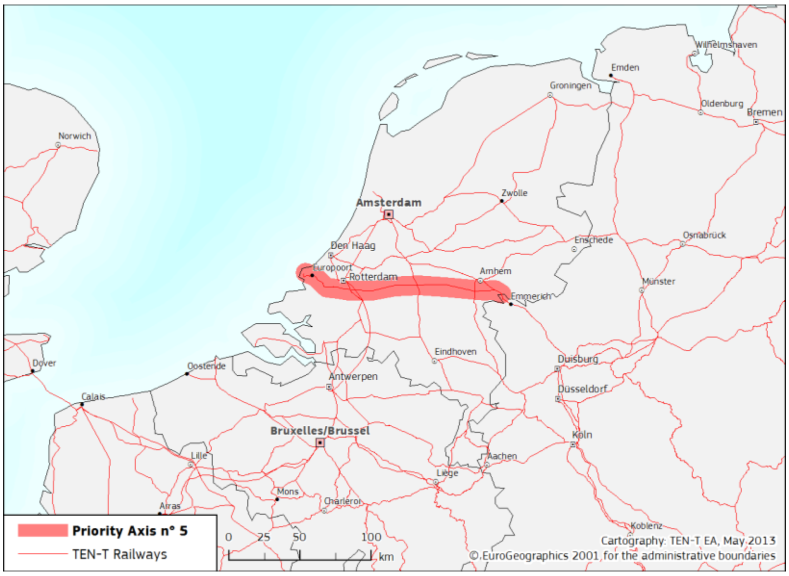
RAIL TRANSPORT

DEUTSCHE BAHN AND PORT OF ROTTERDAM WORK CLOSELY TOGETHER

Deutsche Bahn and the Port of Rotterdam Authority want to coordinate closely on the expansion of the Emmerich-Oberhausen rail line.

The boards of management of DB AG, DB Netz, and DB Schenker Rail and the board of management of the Port of Rotterdam Authority held talks in Rotterdam.

The smooth running of the construction phase is very important for both companies.



To prevent bottlenecks, the existing capacities on the Betuwe line will initially be used as well as other cross-border rail lines.

This should ensure the supply of goods throughout the entire construction phase.

Hans Smits, CEO of the Port of Rotterdam Authority, commented, "We were very pleased when the finance agreement for the expansion of this important transport axis was signed in July.

However, we still have some hard work ahead of us.

We need to collaborate closely to complete this line as quickly as possible."

"The European rail freight company DB Schenker Rail is ready and able to increase its efforts to serve the Port of Rotterdam.

During the expansion phase of the Betuwe route, we will do everything in our power to ensure that our customers can enjoy smooth rail transport operations," said Dr. Alexander Hedderich, CEO of DB Schenker Rail.

"This expansion almost doubles the capacities for freight transport.

Even during the expansion phase, diversion routes will ensure that sufficient capacities are available.

The expansion will also considerably improve noise control along the railway line, thus improving conditions for residents," said Dr. Jörg Sandvoß, Member of the Management Board for Sales and Scheduling at DB Netz AG.

The route is part of the most important freight transport corridor in Europe linking Rotterdam and Genoa.

The Rhine/Ruhr metropolitan area will be better connected with the Port of Rotterdam thanks to the expansion and modernization.

€1.5 billion will be invested in the expansion of the 73 km route in the coming years.

Leading representatives of Deutsche Bahn and the Port of Rotterdam Authority met yesterday in Rotterdam.

The Port Authority outlined the most significant developments at the port and presented its growth forecasts for the coming decades.

The port aims to double its share of rail freight transport in the entire hinterland transport network by 2030, with DB as a key partner in achieving this.

(from: dbschenker.com, December 4th 2013)

INTERMODAL TRANSPORT

€350 MILLION TO FUND KEY TEN-T PROJECTS

The European Commission launched today Calls for proposals worth €350 million to finance European transport infrastructure (TEN-T), for projects in all EU Member States and for all transport modes: air, rail, road, maritime and inland waterways.

Commission Vice President Siim Kallas, responsible for transport, commented: "With the 2007-2013 budgetary period coming to an end, we will make the best possible use of these TEN-T Calls for Proposals to make sure European transport infrastructure supports a seamless mobility of goods and people throughout the European Union.

I am confident that these calls will elicit great interest throughout the EU, as Member States realise the importance of investing today for tomorrow's growth and jobs."

The TEN-T multi-annual programme traditionally finances the highest priorities of the TEN-T network.

This year's multi-annual calls, the last ones to be held under the 2007-2013 budget, focus on five fields, with €280 million of total indicative budget available:

- The 30 TEN-T Priority Projects (with the exception of MoS): indicative budget €50 million.
- Motorways of the Sea (MoS) providing viable alternatives for congested roads by shifting freight to sea routes: indicative budget €80 million.
- European Rail Traffic Management Systems (ERTMS), enabling interoperability on the European rail network: indicative budget €70 million.
- Air Traffic Management (ATM), implementing the Single European Sky and ATM modernisation objectives: indicative budget €30 million.
- Intelligent Transport Systems (ITS), promoting interoperability and continuity of real time traffic and travel information services across Europe towards a safer and more efficient road network: indicative budget €50 million.

The annual programme complements the multi-annual one and for 2013 directs funding to two distinct priorities with a total indicative budget of €70 million:

- Acceleration/facilitation of the implementation of TEN-T projects (studies and works for mature projects for all modes, as part of the projects of common interest): indicative budget €20 million.
- Measures to promote and develop innovative solutions and new technologies in areas such as: alternative fuels infrastructure, sustainability of urban mobility, traffic efficiency, decarbonisation, noise reduction, and safety (e.g. vehicle-infrastructure communication systems): indicative budget €50 million.

The TEN-T Executive Agency (TEN-T EA) manages the technical and financial implementation of the TEN-T programme, under the auspices of Directorate-General for Mobility and Transport.

The TEN-T EA will hold an Info Day on Friday 13 December 2013 in Brussels to help potential applicants better understand the call priorities, prepare their proposals and learn about the evaluation process.

The deadline for the submission of proposals is 11 March 2014.

(from: eurift.eu/europa.eu, December 11th 2013)

INLAND RIVER TRANSPORT

DUISPORT INCREASES CONTAINER HANDLING TO 3 MILLION TEU

According to current projections the Duisport Group will handle goods with a total volume of more than 60 million tonnes in 2013 and thus at the previous year's level.

The result in combined transport has risen once again.

Container handling by ship, rail and truck will likely grow by around 16 per cent to over 3 million TEU (2012: 2.6 million TEU), thus reaching a new high.

"This impressive growth in the container sector shows that one can generate growth with integrated transport and logistics concepts, even when there are stagnating handling figures in the sea ports," says Erich Staake, Chief Executive Officer of Duisburger Hafen AG.

With the new record results of 3 million TEU Duisport is among the 50 largest container ports worldwide.

Thus Duisport has asserted its position as the largest container handling point in the hinterland.

"Acquiring new customers in contract logistics and the associated container volumes have been the main drivers of growth.

In addition, by targeted development and new construction of terminal capacities we have created the conditions for further growth," explains Erich Staake.

For example, the new CT Terminal Logport III started daily operations in spring 2013.

Over 50 trains are already processed here per week.

With seven handling tracks, two marshaling yards and two gantry cranes, the handling capacity on Logport III will be increased to approximately 600,000 TEU on overall completion.

By entering automotive logistics, further container volumes have been acquired for the location.

"With the CKD centers of Audi and Volkswagen, which are going into full operations next year, we are confident we will also be able to increase container handling further in 2014," says Erich Staake.

(from: eurift.eu/duisport.de, December 13th 2013)

LAW & REGULATION

EUROPEAN PARLIAMENT APPROVES AMENDED FOURTH RAILWAY PACKAGE

MEPs have voted through amendments to the Fourth Railway Package, drawing concerns from public transport bodies around Europe.

Prior to the Transport and Tourism Committee's meeting yesterday (December 17) UITP, EPTO and EMTA had all expressed concerns about how numerous compromise amendments would affect the legislation's central aim of improving competition across Europe.

UITP | EUROPEAN UNION

International Association of Public Transport
Union Internationale des Transports Publics
Internationaler Verband für öffentliches Verkehrswesen
Unión Internacional de Transporte Público

Position paper

Prise de Position – Stellungnahme

2 MAY 2013

Fourth Railway Package

UITP (Union Internationale des Transports Publics) is the international organisation of public transport, it is based in Brussels and covers all urban, suburban and regional public transport modes (bus, metro, light rail, regional rail and waterborne public transport). It gathers over 3.100 members worldwide, public transport operators, their authorities and suppliers.
In the European Union, the UITP EU Committee (EUC) represents the views of the public transport undertakings of the 27 member countries. It is closely following and participating in the elaboration of the different European policies and initiatives that have an impact on urban, suburban and regional public passenger transport.

Key facts for public transport in the EU 27:

Passenger journeys: 60 billion/year, more or less equally shared between road modes (mainly bus) and rail modes (urban, suburban and regional rail)

Economic value of public transport services: € 130 - 150 billion/year or 1 - 1.2% of GDP

Employment: direct employment 1.2 million and indirect employment 2 - 2.5 indirect jobs for each direct job on average

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UITP has said that some of the amendments could weaken the regulation's "legal security" and its central aim of opening up closed markets to new entrants.

One of the amendments highlighted by the association will allow public service contracts to continue to be directly awarded in certain situations without being required to go through a competitive tendering process.

Speaking after the vote, UITP's Thomas Avanzata said: "First of all, UITP is happy with the fact that the process goes on because obviously UITP is more in favour of progressive opening of railway markets.

But we have huge concerns with some of the amendments, the compromise amendments, that have been adopted in [the] transport committee this morning.

"First concern is that legal security could be jeopardized by some of these amendments, and second concern is the fact that UITP's position was that the revision of regulation on the public transport services was to be limited to what was strictly necessary to open up railway markets."

The committee also approved the package's 'technical pillar' which over a four-year transition period will take away the responsibility of certification from national safety authorities and create a single safety certificate issued by the European Railway Agency.

As expected, the legislation is also moving away from demanding a complete separation of infrastructure managers and operators, allowing members to opt for an integrated structure with a single holding company governed by stricter requirements for financial transparency.

The European Parliament has said it expects to vote in plenary on the package in February 2014.

(from: globalrailnews.com, December 18th 2013)

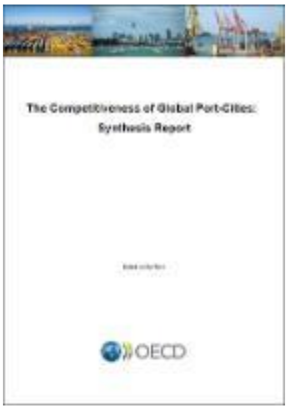
STUDIES & RESEARCH

CLOSING THE GAP ON PORT-CITY POLICIES

A new report suggests that effective public policies are needed to improve port-city development, but the amount of policy-relevant knowledge is limited.

The Organisation for Economic Co-operation and Development's (OECD) report, which is part of its Port-Cities Programme, aims to identify how ports can be assets for urban development and assesses the impact of ports on cities and regions.

Olaf Merk, administrator of the OECD Port-Cities Programme, told Port Strategy: "The main challenge for ports is creating value.



That sounds trivial, but many ports - and their cities - are struggling with this.

Ports will have to think increasingly about a future beyond cargo handling."

"The main challenge for cities is to organise and structure this debate.

How can ports be drivers for development?

It is only in a spirit of cooperation between a ports and the city that synergies can be reaped," he added.

Many port-cities are facing the "local-global mismatch" whereby many of the economic benefits of ports spill over to other regions, while many of the negative impacts are "highly localised".

According to the report, more than 90% of the indirect economic impacts of the ports of Le Havre and Hamburg are taking place in other regions rather than the port region itself.

Containerisation, globalisation and consolidation of the terminal industry, port concentration and the growth of global cities have added to the problem, the report suggests.

OECD says as demand for knowledge and assessments of the effectiveness of port-city policies increases, it's vital the policy gap is filled with more transportation and R&D polices to stimulate development and high port traffic performance.

The full report can be read on the website: http://www.oecd.org/gov/regional-policy/Competitiveness-of-Global-Port-Cities-Synthesis-Report.pdf

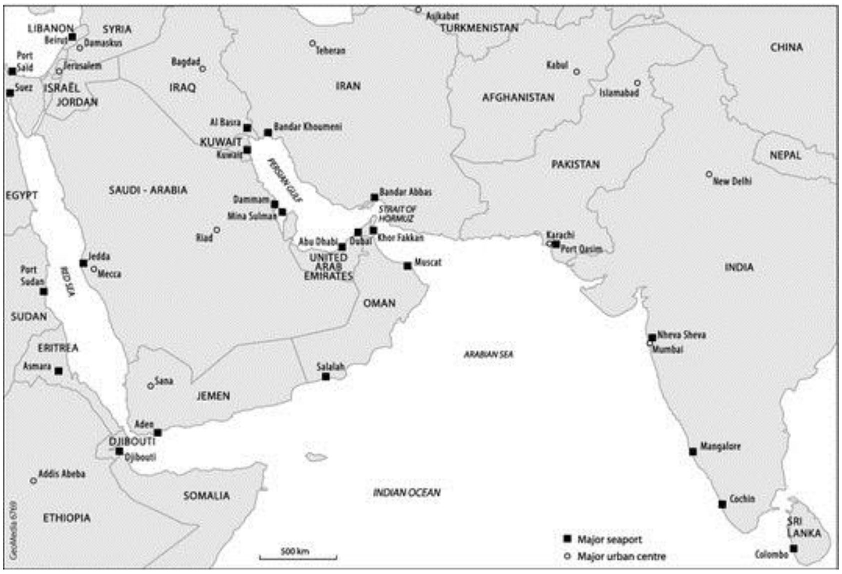
(from: portstrategy.com, December 16th 2013)

CONFERENCES

MIXED SENTIMENTS OVER MIDDLE EAST PORT CAPACITY

While the mood at the TOC Container Supply Chain Middle East show being held in Dubai has been generally positive, some speakers expressed concerns over the massive terminal development projects planned for the region.

These could see almost 12M TEU of new capacity added by the end of 2015 with the main expansion taking place in Jebel Ali, Khalifa and Doha.



It may be a contributory factor for the closer relationships that appears to be evolving between terminal operators, such as DP World and Abu Dhabi Terminals (ADT), and logistics companies and beneficial cargo owners.

"In the future our competitive edge will be the supply chain," explained Abdulla Bin Damithan, director of account management for container terminals at DP World.

Addressing the petrochemical supply chain session, he stressed that DP World was "developing sustainable logistics solutions for this business sector in order to accommodate its growth potential effectively".

"There will be at least 2M TEU of petrochemical exports coming out of this region," Damithan said.

Martijn Van de Linde, chief executive of ADT, which is adding at least 1M TEU of this new capacity, is not unduly concerned.

He told delegates: "Terminal utilisation levels remain high in this region and this has led to some congestion issues.

I am convinced that even if you add all the current developments planned to be in place by 2020, utilisation will be 80%."

He added: "Regional ports will be highly utilised and if there is a question to be asked, it is that we think more capacity is needed.

We will also need to make greater use of automation as a means of raising our productivity levels.

This year we have seen our gross moves per crane hour (GMPH) improve 44% to 33 GMPH and are in the process of moving this up to 44 GMPH."

In contrast, Michel Deleuran, executive vice president of maritime at Qatar-based Mihala, was more reserved.

In a panel discussion, he said there was a "danger that cargo could be cannibalised and prices cut.

It is important that ports and investors in terminals look to develop specific roles and protect their cargo base".

Deeuran stressed: "If the new competition taking place is not viewed constructively, then the only way an existing port can respond is by dropping rates."

With a large number of ports in the Middle East relying heavily on transhipment cargo and ports, especially in the upper Gulf region, eager to attract direct call services, competition is bound to be intense.

The consensus is that while traffic in the Middle East region will outpace that of Europe, North America and South Asia, the 4-5% annualised growth rates projected up to 2020 will still lag that of supply, which is generally forecast to expand by 7% per annum; nonetheless, capacity utilisation throughout the period is not expected to drop below 70%.
Interesting times lie ahead for ports and terminal management companies in the region.

(from: worldcargonews.com, December 10th 2013)

ON THE CALENDAR

- 8th Indian Ocean Ports and Logistics 2014
  Le Meridien Hotel, Mauritius
  Thursday 23 and Friday 24 January 2014

- 6th Intermodal Asia 2014
  Intercontinental Melbourne The Rialto, Australia
  Thursday 27 and Friday 28 February 2014

- 12th Intermodal Africa North 2014
  Lagos Oriental Hotel, Nigeria
  Thursday 27 and Friday 28 March 2014

- 2nd Med Ports 2014
  Kenzi Farah Hotel, Marrakech, Morocco
  Wednesday 23 and Thursday 24 April 2014

- 10th Trans Middle East 2014
  InterContinental Doha The City, Qatar
  Wednesday 21 and Thursday 22 May 2014

- 12th ASEAN Ports and Shipping 2014
  JW Marriott, Jakarta, Indonesia
  Wednesday 11 and Thursday 12 June 2014

- 3rd Black Sea Ports and Shipping 2014
  The Marmara Taksim Hotel, Istanbul, Turkey
  Wednesday 03 and Thursday 04 September 2014

- 12th Intermodal Africa South 2014
  International Convention Centre Durban, South Africa
  Thursday 23 and Friday 24 October 2014

- 9th Southern Asia Ports, Logistics and Shipping 2014
  ITC Grand Chola Chennai, India
  Thursday 27 and Friday 28 November 2014

- 9th Indian Ocean Ports and Logistics 2015
  Maputo, Mozambique
  Thursday 29 and Friday 30 January 2015

The Secretariat of C.I.S.Co. is able to communicate detailed information on the programs of all the events and how to participate.