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PORTS AND TERMINALS

HAMBURG COPES WITH MORE CONTAINERS, BUT STRUGGLES WITH FLOOD OF BIGGER SHIPS

Despite a near record container throughput last year, the port of Hamburg's growth is likely to be hobbled by further delays in the courts to the urgently needed widening and deepening of the River Elbe.

"We have already waited far too long for the start of dredging," complained Ingo Egloff, chief executive of the port's marketing executive board.

Mr Egloff said that, with 507 calls in 2014, there had been a 24% year-on-year increase in ULCVs with slot capacities in excess of 10,000 teu at Hamburg, and cautioned that the patience and loyalty of ocean carriers was being tested to the limit given the hub's current loading and sailing draught restrictions.

Referring to the years of legal procrastination that has stymied the dredging of the Lower and Outer Elbe, Mr Egloff vented his frustration, suggesting that the need for the work must now be recognised by "even the most obstinate opponents of modification of the channel".

Mr Egloff hopes approval for the dredging will come from the Federal Administrative Court in Leipzig in the spring, and that the two-year project to deepen the Elbe's navigation channel by a metre and construct a 385-metre-wide passing channel will be able to start this year.

With the Berlin government developing a new infrastructure plan for the country, Mr Egloff is lobbying for German seaports to be given "top priority", and specifically for money for the upgrading of inland waterways.

Hamburg's container terminals processed 9.7m teu in 2014, a 5.1% increase on the previous year and just shy of its record pre-financial crisis performance in 2008.

Elsewhere, Europe's largest container port, Rotterdam, reached 12.3m teu last year, up 5.8% on 2013 while third-ranked Antwerp's throughput increased by 4.7% to 9m teu.

Hamburg's trade with China accounted for almost one third of its entire container throughput and was up 9.8% on the previous year at 3m teu.

But there were other significant growth areas, such as Poland – up 22.6% at 395,000 teu – and trade with India increasing by 14.9% to 232,000 teu.

Offsetting that were problems with its trade with Russia, where sanctions, the declining rouble value and the collapse of oil prices impacted the second half of the year, when Russian throughput was down 7.8% on 2013 at 662,000 teu.

Hamburg's biggest terminal operator, HHLA, increased its throughput by a modest 1.2% on 2013, to reach 7.2m teu handled at its three facilities, citing a reduction in feeder traffic with Russia as the reason for the disappointing growth.

Its operation in the Ukrainian port of Odessa was hit by the ongoing conflict in the country, with throughput down some 30% year-on-year to around 300,000 teu.

Germany's largest terminal operator, Eurogate, processed 2.3m teu across its Hamburg quays, up an impressive 16.7% on the year before, and chairman Emanuel Schiffer reinforced the comments of Mr Egloff.

Eurogate hosted the once biggest containership in the world, the 19,100 teu CSCL Globe, at Hamburg on 16 January and is expecting the call of its successor to the title, the 19,224 teu MSC Oscar, at Wilhelmshaven in early March.

Mr Schiffer said: "The forecasts have proved correct.

Our customers are calling at our container ports with ever larger container vessels.

It presents considerable challenges for the infrastructure of seaports as well as the superstructure of container terminal operators."

(from: theloadstar.co.uk, February 11th 2015)

MARITIME TRANSPORT

ANOTHER CONTAINER SHIPPING LINE OCEAN FREIGHT TIE UP AGREED

Confirmation of another container shipping line alliance announced as the United Arab Shipping Company (UASC) has formally agreed a new partnership with CMA CGM and Hamburg Süd to enter the North Atlantic trade.

UASC already allies with CMA CGM as part of the Ocean Three tie up and, as we mentioned earlier this month, had this agreement on the blocks awaiting ratification from regulatory authorities for this service whilst simultaneously entering into a general cooperation agreement with Hamburg Süd to secure entry to the South American freight trades for the first time, with services due to start in mid-April.

Through this new vessel sharing agreement, the three partner companies will operate a service on the Transatlantic North trade, linking Northern Europe with the United States East Coast.

The service will call at the ports of Antwerp, Rotterdam, Bremerhaven, Le Havre, Southampton, New York, Norfolk, Charleston and Savannah and vice-versa, offering competitive transit times and a weekly capacity allocation of around 3,300 TEU.

UASC says the company's entry into the North Europe - North America trade marks an important step in the expansion of its global network allowing UASC's customer to benefit from a significantly expanded geographical reach and an enhanced range of services.

Jørn Hinge, President and CEO at UASC, commented: "This announcement marks an exciting new chapter for UASC as we enter the North Atlantic service and further cement our position as an emerging global carrier.

Broadening our network coverage through partnership agreements an integral part of UASC's ambitious expansion plans.

Collaboration with other leading carriers ensures that we can provide our customers with the widest scope of global services and the lowest possible unit costs, whilst growing in a responsible fashion and without adding unnecessary capacity.

We are excited about the opportunities that this new transatlantic service will create for UASC customers.

By partnering with two of our key partners CMA CGM and Hamburg Süd, with whom UASC has important long-term agreements on other trades, we are confident that we will deliver fast transit times, high standards of reliability and service excellence on this route."

The new service will start in the third week of May 2015.

More details on transit times and allocation will be published soon whilst UASC continues its major newbuilding program for 17 new ships; eleven 15,000 TEU vessels (A15) and six 18,800 TEU vessels (A18), which it plans to be among the most cost-efficient and environmentally friendly vessels in the world.

The first three A15 vessels have been delivered to the UASC fleet, achieving the distinction of being the world's first LNG-ready ultra-large container vessels.

In total, 11 vessels from UASC's newbuild program will be delivered by the end of 2015.

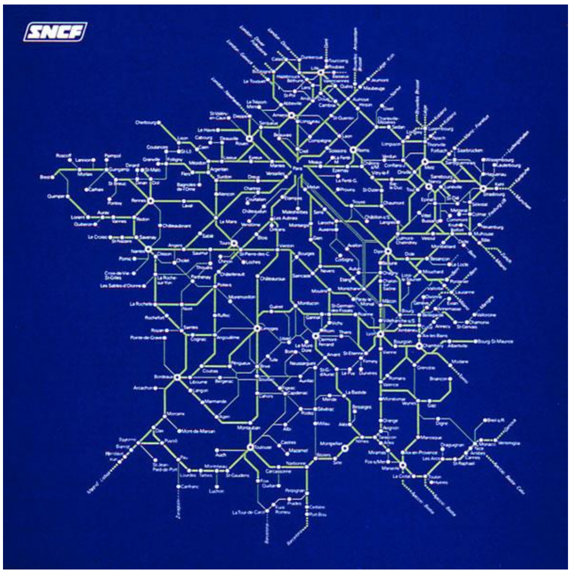
(from: handyshippingguide.com, February 16th 2015)

RAIL TRANSPORT

RECORD INVESTMENT IN FRENCH RAIL INFRASTRUCTURE

France's new combined infrastructure manager, SNCF Réseau, is to invest a record €4.9 billion in enhancing and maintaining the national rail network in 2015.

Announcing its annual results, SNCF Réseau said it planned to recruit 2,000 new employees to meet the demand for maintenance work.



In January, SNCF Infra, which was responsible for maintenance and traffic control, was combined with infrastructure manager RFF to create SNCF Réseau.

In 2014, RFF's revenue grew by 4 per cent to €5.9 billion.

The organisation's operating margin also increased, rising 8 per cent to €2.1 billion.

RFF's operating income fell to €1.2 billion resulting in a net loss of – €213 million.

RFF's debt subsequently rose to €36.8 billion by the end of 2014.

The SNCF group as a whole has recorded an increase in turnover in 2014 despite a challenging year, which included a two-week strike in June.

Turnover increased by 1.5 per cent to €27.2 billion in 2014 thanks in part to SNCF's international activities, which grew by 7 per cent in the past year.

Net profit improved to €605 million compared to – €180 in 2013 caused by the €1.4 billion depreciation in TGV rolling stock.

SNCF said it had stabilised its €7.4 billion debt and recorded investments of €2.2 billion.

Announcing its outlook for 2015, SNCF said it had 'ambitious' goals to increase revenue by 3 per cent and international revenue by 27 per cent.

(from: globalrailnews.com, February 20th 2015)

ROAD TRANSPORT

FRANCE IMPOSES MINIMUM WAGE ON FOREIGN TRUCK DRIVERS

A new French law, passed in the National Assembly yesterday and to take effect at the end of this year, will impose statutory minimum wage regulations on foreign truck drivers plying international routes to and from France and undertaking cabotage in the country.

The main trade federations representing French haulage firms said the new law was "a partial response" to their demands for action to combat the distortion of competition in the sector - notably as a result of 'low-cost' operators from Eastern Europe ‘dumping’ on wages.

But they argue that ultimately, the issue can only resolved at EU level and by re-defining cabotage rules.

Earlier this month, the German government suspended a measure that had extended the country’s minimum wage regulations to international hauliers operating in transit through Germany following criticism from other European countries, notably Poland and also trade bodies such as the IRU.

The Commission is now examining whether the move is legal under EU law.

Under current cabotage regulations, truck drivers from EU member states are at present allowed to carry out a maximum of three domestic transport operations in fellow member states over a seven-day period, immediately following an international operation.

Not being considered as 'posted' workers (transferred from one EU state to work temporarily in another), their employers are not obliged to respect wage regulations in the host country.

(from: lloydsloadinglist.com, February 18th 2015)

INTERMODAL TRANSPORT

MELZO BACK TO FULL SERVICE

Contship Italia Group's intermodal rail hub is back in full operation following completion of flood damage remediation works by RFI.

Rail Hub Milano Spa, the Sogemar (Contship Italia arm) affiliate that now manages the Melzo rail hub near Milan can now operate at full service, with train access and exit to/from the national railway network around-the clock without constraints.

Time slot limits were introduced by RFI (Rete Ferroviaria Italiana) due to force majeure - flooding in mid-November had irreparably damaged the control station located in Melzo, as reported by RFI itself in its official communications to railway operators dated November 18, 2014.

The restoration of rail operations was enabled by a new computerized centralised system designed and deployed in just three months by RFI.

The terminal development programme is also proceeding as planned, with the inauguration of a new 100,000 m^2 yard during April.

Four internal 750m long rail tracks are already being used, while fencing and asphalt are being completed.

The new area of the terminal will be equipped with new technologies for the use of energy from renewable sources.

Sebastiano Grasso, Vice President Contship Italia Group for Intermodal and Logistics and President of Rail Hub Milano commented: "I am grateful to the technicians of RFI for this result.

Rail Hub Milano can now return to fully compete in the market...It was a team-work task that involved many people, from the operations and commercial departments of RHM, Hannibal and Oceanogate Italia.

"Thanks also to Regione Lombardia, Comune di Melzo and Vignate and all institutions that have been in close contact in recent months, putting in place all the possible effort to protect the investments and employment generated by our infrastructure."

(from: worldcargonews.com, February 18th 2015)

LOGISTICS

FRENCH 3PLS IMPROVE FINANCIAL PERFORMANCE

France's leading freight transport and logistics groups, units of French state railways SNCF and conglomerate Bolloré, turned in a stronger financial performance last year than in 2013, new figures show.

SNCF Logistics, whose major element is Geodis, recorded an operating profit in 2014 of €431 million, up 30% compared to €331 million a year earlier on a turnover that was stable at just over €8.8 billion.

SNCF said the improved results reflected the recovery in its rail freight and multimodal activities - in particular, Fret SNCF, which has reduced its losses three-fold over the past five years - and also at Geodis.

In the first half of last year, Geodis had managed to post an increase in revenue, albeit modest (+0.9%), thanks largely to growth in its freight forwarding business Geodis Wilson and international logistics, which had more than compensated for the decline in activity in France.

SNCF Logistics' turnover from business outside of Europe grew by 5.8% on 2013.

As for Bolloré's transport and logistics division, it posted a 5% increase in turnover last year on 2013, with revenues up 9% in the final quarter alone.

The group said this had been largely due to an increase in volumes of freight handled by its forwarding subsidiaries – which include SDV – in Europe and Asia and also on intra-Asia trade lanes.

Another factor in turnover growth had been an increase in traffic handled at the container terminals it runs and which are mainly located in West Africa.

Among more detailed figures from SNCF Logistics (formerly SNCF Geodis), the company highlighted commercial successes in 2014, including: on-going international development of the Geodis freight forwarding activity thanks to new contracts (Alstom, ABB, H&M, Lego, etc.) and extension of its international network of operating hubs - particularly the hubs dedicated to the oil and gas industry.

Growth of the Geodis logistics activities in continental Europe included the signature of several major contracts, including: the management of Europe flows for Colgate from Hungary; a dedicated 110,000sqm platform at the Dutch logistics campus for AOC International and MMD Monitors & Displays; and upstream transport, storage, and distribution of Conforama products.

Within automotive logistics unit STVA, it highlighted accelerated development for used vehicle logistics, including the signing of two contracts with Renault Retail Group in France and Volkswagen VO in Germany; and development of a service offering for insurers.

Meanwhile, other noteworthy developments included Geodis' announcement of the sale of its Ciblex and Italian parcel delivery activities – "the result of a strategic decision concerning the positioning of the Parcel Delivery & Express activities in historical regions and in the traditional parcel delivery and industrial express delivery sectors".

(from: lloydsloadinglist.com, February 13th 2015)

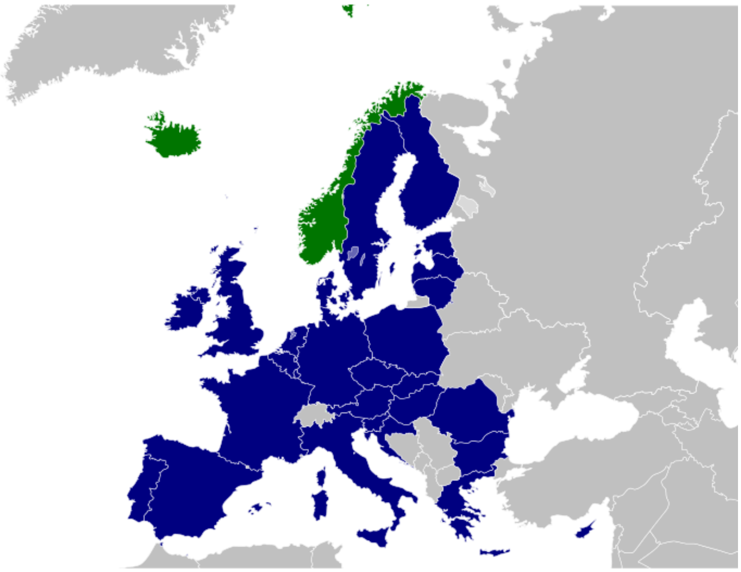
LAW & REGULATION

COMMISSION ACCEPTS COMMITMENTS FROM FRANCE ON FISCAL EXEMPTIONS FOR CERTAIN MARITIME CHARTERING SERVICES IN FRANCE

The European Commission has closed an in-depth investigation opened in 2013 to examine whether changes to French tax rules for maritime companies were in line with EU state aid rules after France offered commitments addressing the Commission's concerns.

The Commission had concerns that also giving favourable fiscal benefits to certain vessels sailing under non-EU flags would run counter the objectives of EU maritime transport policy.

France has now committed to ensure that French tonnage tax payers flag at least 25% of their tonnage in the EEA.



This addresses the Commission's concerns.

In May 2003, the Commission originally approved the French tonnage tax scheme.

This scheme allows shipping companies to be taxed on the basis of the tonnage of the fleet rather than the actual profits of the company.

The scheme limited the eligibility of time chartered ships not flagged in the EU ("time chartered" vessels provide maritime transport services with vessels and crew temporarily rented from other companies).

Such ships could not constitute more than 75% of the fleet of a tonnage tax payer.

This scheme was in line with the then applicable 1997 EU guidelines on state aid to maritime transport, which aimed to enhance the competitiveness of shipping companies facing competition from non-EU businesses and boost jobs in the sector.

After the adoption of the Commission's updated guidelines on State aid to maritime transport in 2004, France removed the specific flagging rules for time-chartered vessels without informing the Commission.

In November 2013, the Commission opened an in-depth investigation and invited interested parties to submit comments on the reformed measure, because it considered that specific limits on the eligibility of time chartered ships that do not sail under the flag of a Member State should be maintained.

Having examined the submissions received, the Commission came to the conclusion that so far no tonnage tax beneficiary in France has had more than 75% of its fleet composed of time chartered vessels flagged outside the EU or the EEA.

The removal of the specific flagging rules therefore did not yet have any effect in practice.

At the same time, the Commission also found that there was no guarantee that this would remain the case in future as no minimum EEA flagging requirements were foreseen for new entrants.

As a result, a newcomer company whose fleet was 100% composed of non-EEA time-chartered vessels would be able to benefit from the tonnage taxation.

The Commission considered that this was not in line with the 2004 Maritime Guidelines.

Even if the Guidelines do not impose specific limitations on time charterers (contractually, time-charterers are maritime transport service providers) the Commission has always required in its case practice that time charterers wishing to benefit from tonnage tax contribute to the Guidelines' objectives of preserving a minimum maritime know-how within the EU/EEA or to the objective of promoting EU/EEA flagging of vessels.

To address the Commission's concerns, the French authorities have therefore committed to require from all the French tonnage taxpayers that at least 25% of their tonnage is EEA flagged.

The Commission has accepted this commitment and has therefore closed its investigation.

(from: hellenicshippingnews.com, February 19th 2015)

PROGRESS & TECHNOLOGY

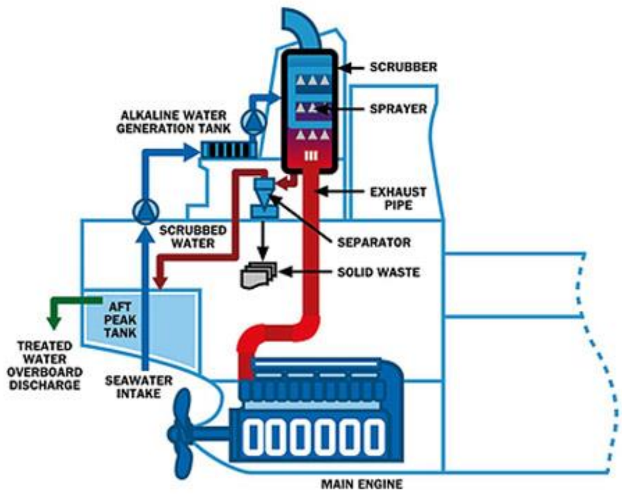
OIL PRICE COLLAPSE HITS SALES OF EXHAUST GAS SCRUBBERS TO MARINE SECTOR

The marine sector's interest in exhaust gas scrubber systems in order to comply with stricter emissions regulations has hit a snag with the global crude oil price collapse and added financial uncertainty.

With effect from January 1, ships operating within 200 nautical miles of shore in North America and Northwest Europe must use fuel with a maximum sulfur content of 0.1% or find an alternative means of compliance, which typically means buying a scrubber system.

Scrubbers allow a shipowner to continue to use high-sulfur bunker fuel, which is less expensive than lower-sulfur fuels, by, in effect, stripping sulfur out of the emissions and allowing the ship to meet the stricter sulfur cap.

For years, scrubber manufacturers have marketed the systems as a way to save money by avoiding the costs of expensive, ultra-low sulfur marine fuels.



But those ultra-low sulfur marine fuels are not so expensive anymore.

Emission Control Area-compliant MGO in Houston has averaged $603/mt in 2015, roughly 40% less than prices over the same period in 2014, Platts data show.

"The short-term scrubber market will be very much affected by the high-sulfur versus low-sulfur fuel differential in price," said Garrett Billemeyer, global technology development manager at scrubber manufacturer DuPont.

As long as bunker fuel prices remain low relative to recent history, shipowners are likely to turn to ultra-low sulfur fuels for ECA compliance rather than alternative measures.

"The global oil price drop seems to be impacting the scrubber adoption negatively," consulting firm MEC Intelligence said in a February report.

"Orders nearly doubled for the six-month period of April-September 2014 while in the last four months growth has been about 19%."

A total of 160 vessels had scrubbers installed by the end of January, compared with 135 by September 2014, MEC Intelligence said.

Scrubber manufacturers differ on their willingness to reveal sales figures.

Wartsila's exhaust gas cleaning systems orders in 2014 were flat to orders in the previous year at 41, though the number of ships that bought scrubbers rose by about 50% to 26 ships, the Finnish company said this week.

Wartsila's sales were unaffected by tumbling oil prices in 2014, however, now "many customers are in wait-and-see mode and hesitant to invest, due to challenging times financially," Wartsila spokeswoman Marit Holmlund-Sund said.

Alfa Laval declined to elaborate on its sales numbers beyond what it said in a recent news release: the Swedish company has received 70 orders for 65 vessels over an undisclosed period of time.

DuPont declined to provide annual sales figures while Norway's Yara Marine Technologies — formerly Green Tech Marine — did not respond to a request for comment.

Following this most-recent drop in the marine fuel sulfur content, there is a larger, global cap of 0.5%S coming in 2020 or 2025, pending an International Maritime Organization vote in 2018.

"Recent lower fuel prices are affecting short-term interest," said DuPont's Billemeyer, "but with the International Chamber of Shipping coming out with a statement last week indicating that the global ECA will most likely be adopted in 2020 [it] means shippers with a long-term view will focus on marine scrubbers as an advantageous solution."

A US fuel oil trader agrees the long-term potential remains, saying that in "2020 everyone is going to have them."

(from: seanews.com.tr, February 18th 2015)

STUDIES & RESEARCH

PANAMAX CONTAINERSHIPS ENJOY RATE BOOST FROM WEST COAST CONGESTION CRISIS

Aggressive scrapping, a dearth of newbuilds and port congestion has given the Panamax containership sector a welcome boost and pushed daily charter rates to their highest level in four years.

According to Alphaliner, there is currently only one Panamax vessel above 4,000 teu in lay-up, compared to the 52 idled vessels of a year ago, and although 25 units were scrapped during 2014 a number of other laid-up ships successfully found employment on new routes.

The expanding African trades, where Panamax ships have replaced smaller geared units, and intra-Asia trades have more than taken up the slack in the sector, not least also providing employment for ships that were cascaded out of the transpacific and Middle East trades by the introduction of bigger ships.

Lack of demand for Panamax ships over the past few years and the poor return for owners resulted in a slump in orders for newbuilds in the sector – with only one new ship delivered last year – and so a supply and demand rebalancing has driven charter rates up to around $13,000 per day currently, said the Alphaliner analyst.

While the daily hire rate for a 4,000 teu ship may have doubled over the past year, the market rate is still considerably less than the $27,000 peak rate enjoyed by owners in the early months of 2011.

Meanwhile, the current port congestion crisis afflicting the US west coast is providing a further boost to the sector.

Although Panamax ships have mostly given way to 6,000-10,000 teu units in the transpacific trade, the current delays to mainline vessels has opened up the market for supplementary ad-hoc charters for the transpacific, and for cargo diverted to the US east coast which sails via the Panama Canal.

Spot freight rates from Asia to the US east coast have climbed to over $5,000 per 40ft – more than double the market rate for the US west coast – as shippers seek to overcome the substantial business-threatening delays of containers stuck on ships and congested quays at Los Angeles, Long Beach and Oakland.

The plunge in fuel prices is another factor that has significantly improved the employment prospects for containerships in the smaller sectors over the past six months as lower bunker costs have narrowed the economy of scale gap between ship sizes and made previously uneconomic ships a sustainable option for carriers.

However, Alphaliner noted that there is a dark cloud on the horizon for the Panamax sector in the form of the opening of the expanded Panama Canal scheduled for the latter part of next year.

Currently 211 Panamax ships of 4,000 teu and above, representing 33% of the sector, are deployed on services transiting the waterway, but from 2016 these vessels could be upgraded to ships of up to 13,000 teu as carriers follow the trend of deploying the biggest ships possible on trades.

(from: theloadstar.co.uk, February 17th 2015)

REEFER

REEFER MADNESS: USWC PILE UP MEANS PAYING US$400 A DAY PER BOX

Angry cold chain logistics operator, Steve Alaerts, sales chief at Antwerp-based Foodcareplus, has warned that delays and diversions due to the steadily worsening US west coast port congestion will wipe out shipper profit.

He said some of the company's latest deep-frozen shipments have been stuck in ports for three weeks "at a horrendous port storage and demurrage cost".

"An average daily storage cost of US$400 per reefer box would bring the cost to US$2,800-$3,000 per week.

That is in many food commodity items over 10 per cent of its value.

"Depending on the product value, those additional costs are wiping away margin for the importers and retailers," Mr Alaerts told Newark's Journal of Commerce.

"In some cases, the shipping lines decide last-minute to omit the port calls, especially the Los Angeles-Long Beach port area, and reefer boxes are dropped in Central American transshipment centres, such as Panama, where they wait for days before being moved further to the west coast."

While steamship lines usually bear the costs in the transshipment port, the supply chain delays and added land transportation costs add up, especially if a containership diverts to US east coast ports.

"Shipping reefer products via the east coast is just not an option for many commodity items because of the total cost to move it to a warehouse and truck it to the west coast," Mr Alaerts said.

"The cost to discharge the product from a reefer box in a warehouse on the east coast amounts to $1,000-$2,000 per container depending on the location, the closer to the port the cheaper.

Trucking the product to the west coast afterwards is at least another $3,500-$5,000 a box."

While railing reefer containers from the Gulf port of Houston via the Alameida Corridor to the west coast was another option, it costs $6,000 per container because of the lack of power packs (generators) on rail cars.

With no end in sight to the waterfront chaos, frustration is mounting among shippers.

The National Retail Federation released a statement accusing the International Longshore and Warehouse Union and Pacific Maritime Association of "shooting themselves in the collective bargaining foot."

(from: chineseshipping.com/shippinggazette.com, February 13th 2015)

ON THE CALENDAR

2015

- 18 Mar Port Finance & Investments Amsterdam, the Netherlands
- 19 Mar Ports & the Environment Seminar Amsterdam, Netherlands
- 24-26 Mar Intermodal Asia 2015 Shanghai, China
- 25-26 Mar 2nd Port & Logistics Development Forum Shanghai, China
- 25-26 Mar 3rd MED Ports 2015 Casablanca, Morocco
- 29-31 Mar International Maritime Transport and Logistics Conference – MARLOG 4 Alexandria, Egypt
- 21-22 Apr TOC Asia Singapore
- 21-22 Apr Port & Terminal Technology Conference & Exhibition Miami, USA
- 21-22 Apr 7th International Conference & Exhibition on Port & Terminal Technology Miami, Florida, USA
- 21-23 Apr Sea Asia Singapore
- 21-24Apr 9th International Chemical and Oil Pollution Conference and Exhibition (ICOPCE 2015) Singapore
- 28-29 Apr Inland Waterways & Shipping Conference Rotterdam, the Netherlands
- 6-7 May 11th Trans Middle East 2015 Doha, Qatar
- 21-22 May ESPO Conference 2015 Athens, Greece
- 28-29 May 4th Black Sea Ports & Shipping 2015 Istanbul, Turkey
- 6-9 Jun 3rd International Marine Exhibition of Iran Tehran, Iran
- 7-9 Jun CMI Colloquium Istanbul, Turkey
- 9-11 Jun TOC Europe in Rotterdam Rotterdam, Netherlands
- 24-25 Jun 13th ASEAN Ports and Shipping 2015 Jakarta, Indonesia
- 24-27 Jun ECONSHIP 2015 Chios, Greece

- 7-11 Sep PIANC-SMART RIVERS 2015 Buenos Aires, Argentina
- 17-18 Sep 10th Southern Asia Ports, Logistics & Shipping 2015 Mumbai, India
- 22-25 Sep NEVA 2015 St. Petersburg, Russia
- 26-28 Oct 6th Global Free Trade & Special Economic Zones Summit Dubai, UAE
- 29-30 Oct 13th Intermodal Africa 2015 Lusaka, Zambia
- 25-26 Nov 14th Intermodal Africa 2015 Lagos, Nigeria
- 8-9 Dec TOC Middle East in Dubai Dubai, UAE

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