



IAPHAMBURG2015
29th WORLD PORTS CONFERENCE

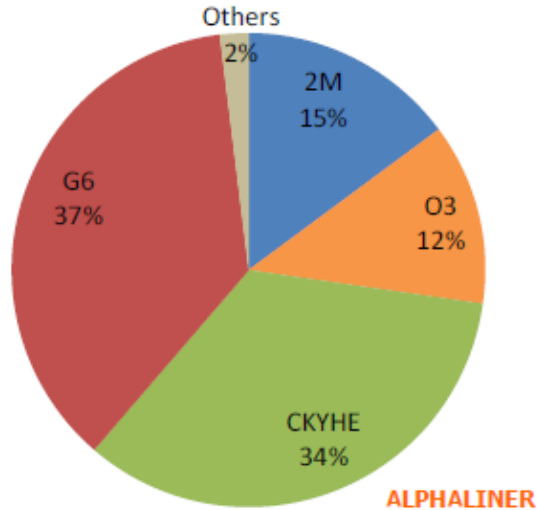
IAPH World Ports Conference 2015



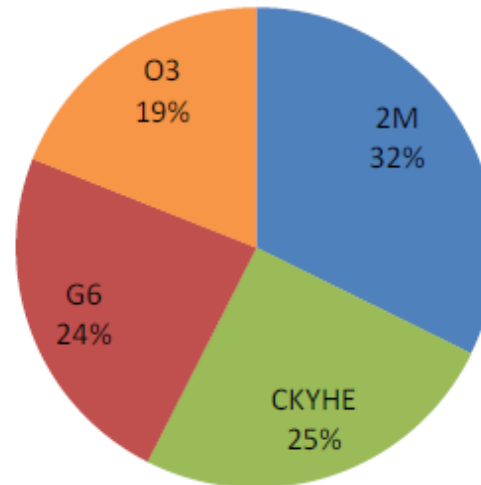
02.06.2015



Estimated capacity share by Alliance
FE-North America
(end 2014)



Estimated capacity share by alliance
FE-North Europe
(end 2014)



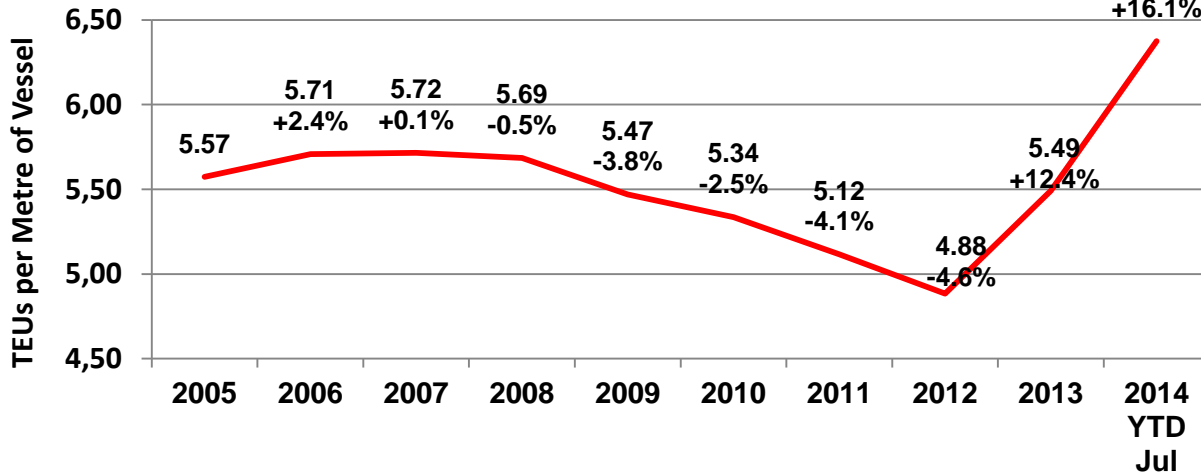
- The deployment of mega vessels requires increasing use of vessel sharing agreements (VSAs) to improve utilisation and realise cost savings
- By 2015, the East-West trades will be dominated by four alliances including nearly all of the Top 20 global carriers
- Slot sharing adds complexity for terminal operators through multiple customer arrangements and inter-terminal trucking
- Full operational integration for shipping lines, that would aid terminals, has been blocked by Chinese regulators and will not be pursued

The Number Of Boxes On The Larger Vessels Is Increasing But Port Productivity Is Being Compromised

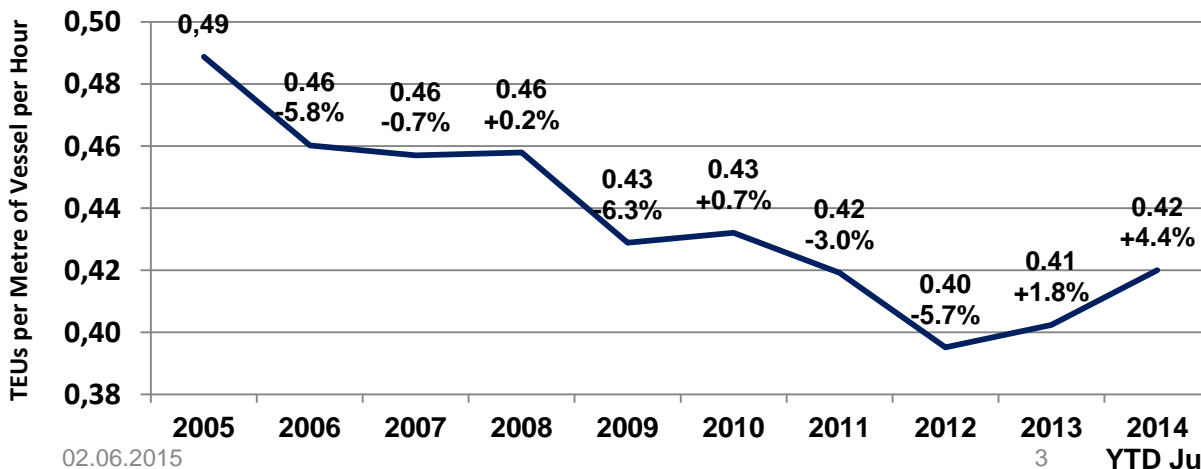


IAPH HAMBURG 2015
29th WORLD PORTS CONFERENCE

MTL T1259 Vessel TEU per LOA (M)



MTL T1259 Vessel TEU per LOA (M) per Port Hour



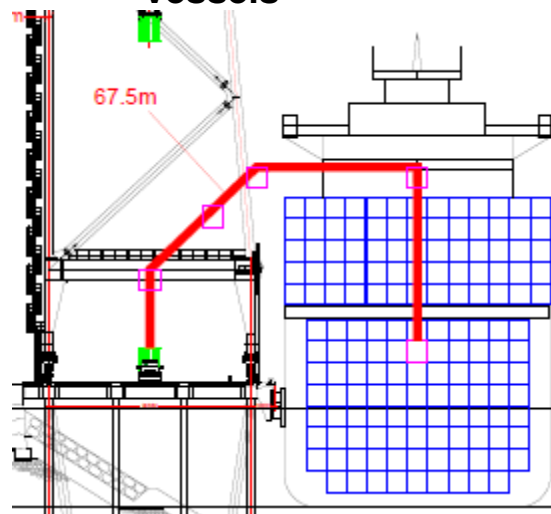
- Vessel sharing agreements have helped to improve vessel utilisation
- For each metre of vessel the average number of containers moved at MTL has increased dramatically in the last 2 years
- However, the required co-ordination of transshipment and inter-terminal moves by shipping lines has not kept pace and hour-by-hour port productivity has suffered
- The ability of terminal operators to maximise equipment use and reduce port stays is being compromised through poor planning by shipping lines

Crane Productivity On Larger Vessels Is Being Reduced

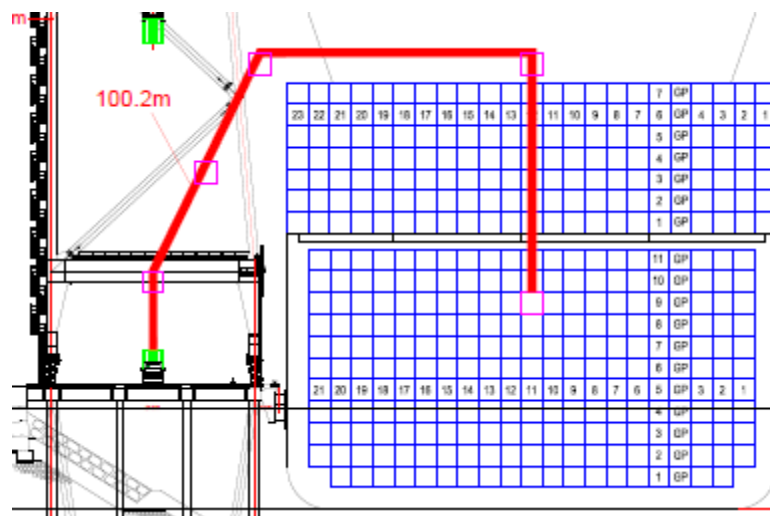


IAPH HAMBURG 2015
29th WORLD PORTS CONFERENCE

Increasing Carry Distances On Mega Vessels



Panamax Vessel
13 across
5 containers above deck



Triple E Vessel
23 across
7 containers above deck
Deck level is 7m higher
than Panamax

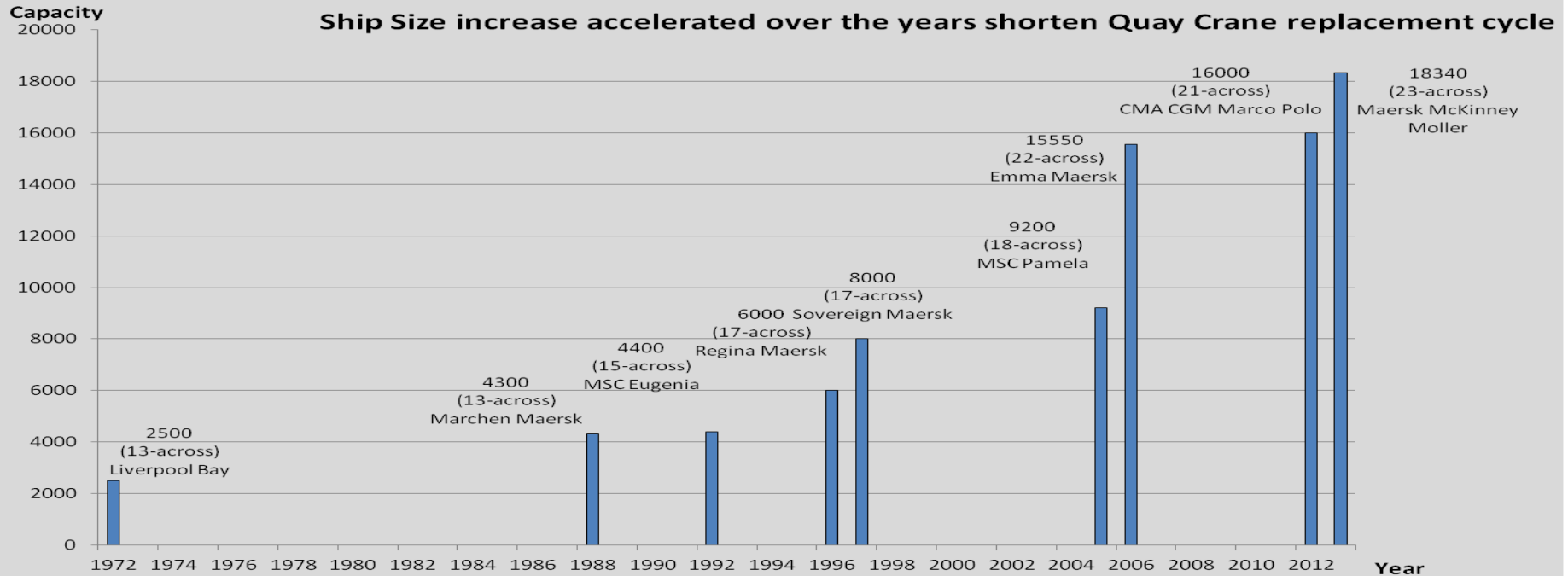
- Vessel sizes are increasing across all major trades
- Travelling distances increase by around 50% for mega vessels (13,000 TEUs+) due to their scale
- The 30mph mega vessel maximum is reduced to 22-24mph in real life unless shipping lines proactively plan their stowage to support port productivity
- Continuing engagement with customers to ensure stowage efficiency and planning transparency is a priority

Other challenges....



IAPH HAMBURG 2015
29th WORLD PORTS CONFERENCE

Ship Size increase accelerated over the years shorten Quay Crane replacement cycle



Thank You