



About the box;

International developments, local consequences

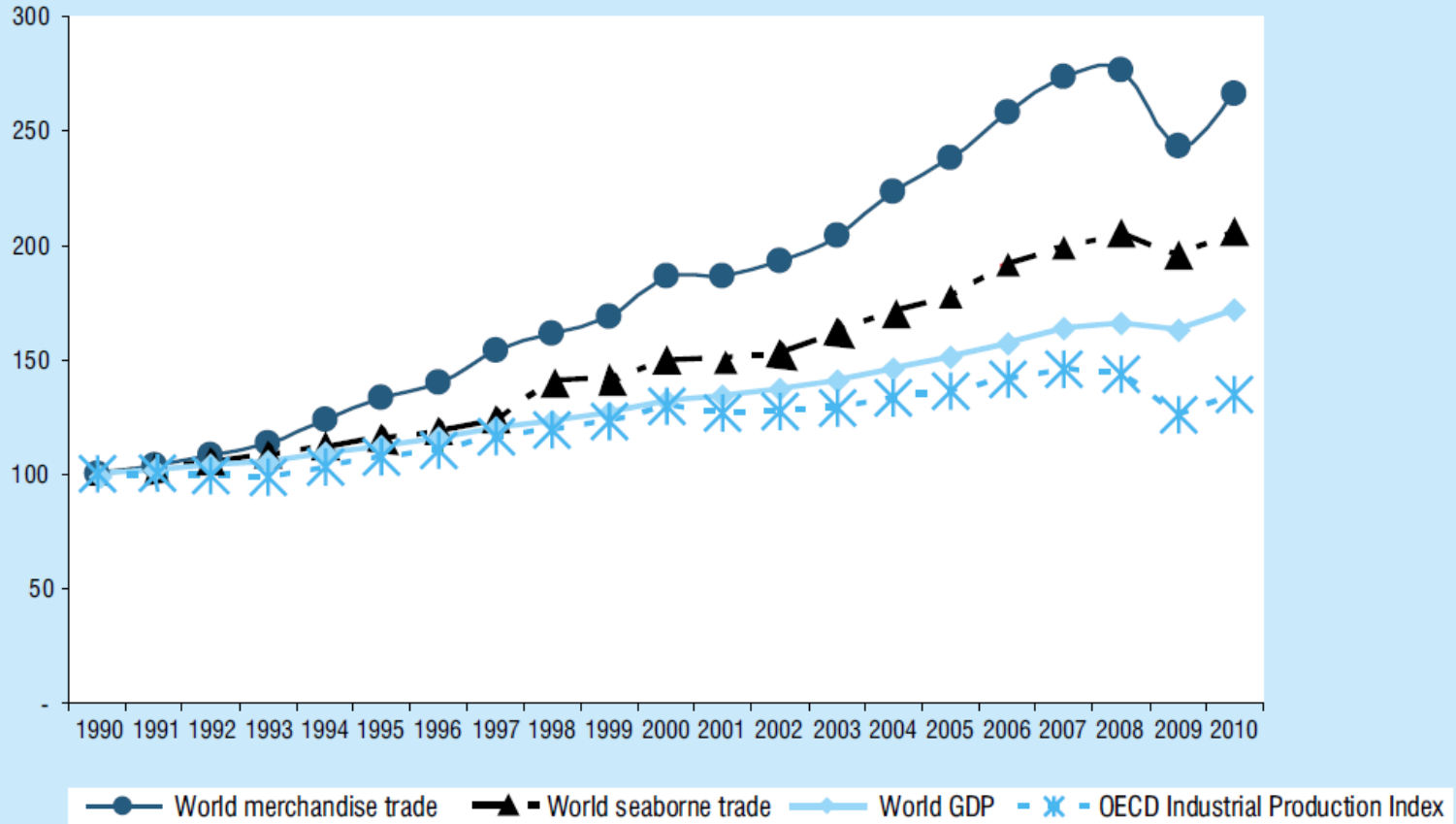
Dr. Michiel Nijdam



The good news when you're in container logistics

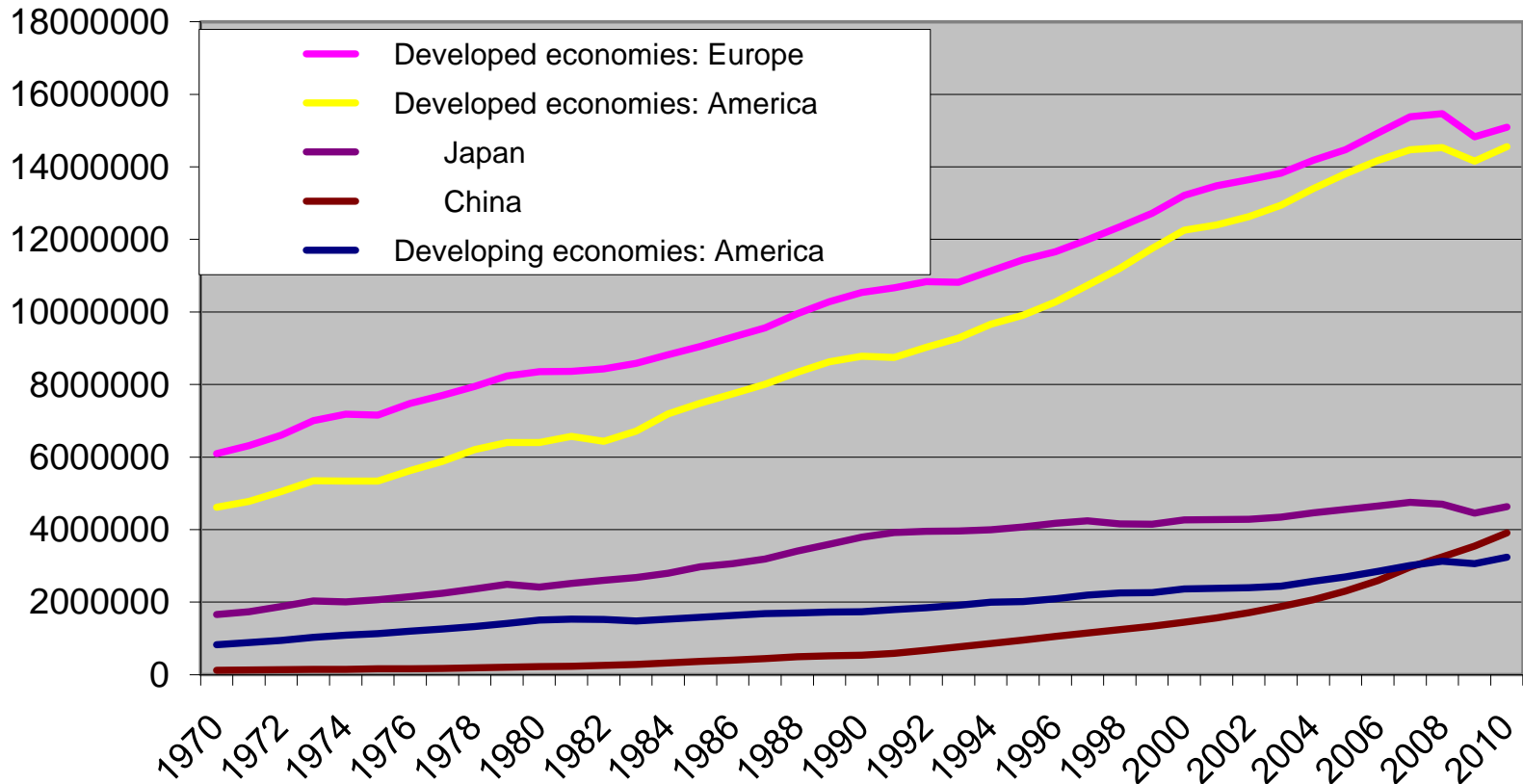
- This era is exciting
 - Large boom; now at tipping point, platform or at new launch level?
 - New players, new technology, new business
- Rotterdam is 'the place to be'

Trade and ocean transport grow



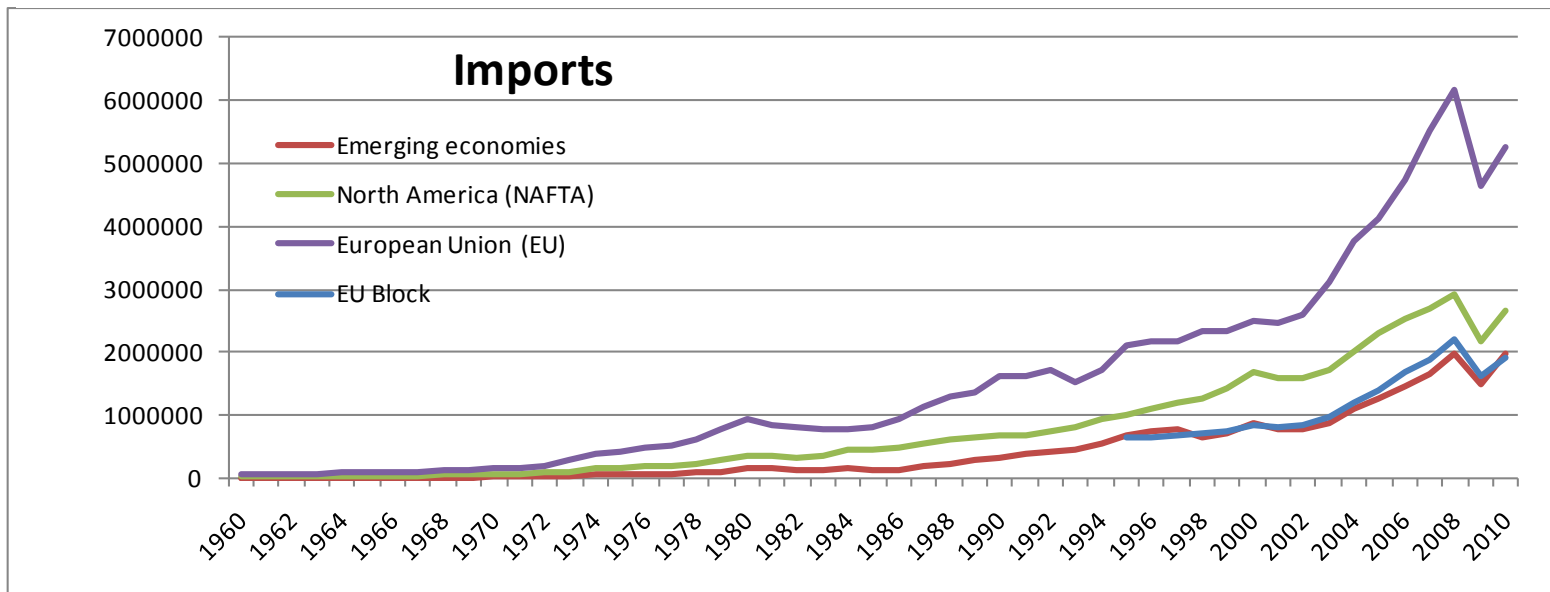
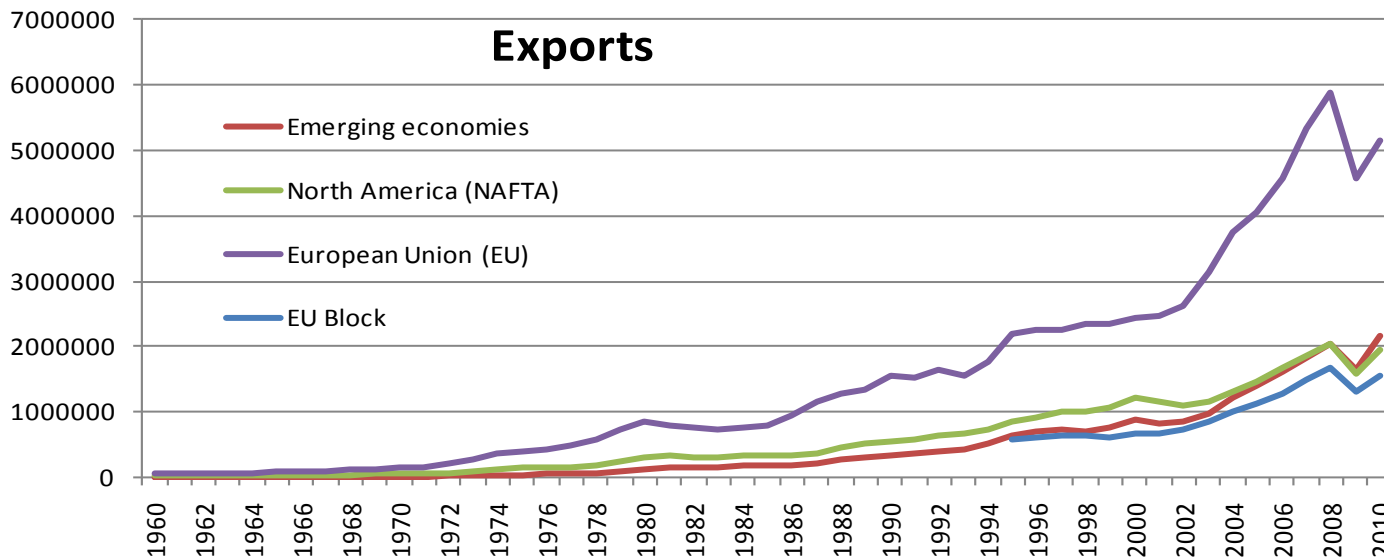
China has a long way to go...

GDP in million dollar (2005 prices)

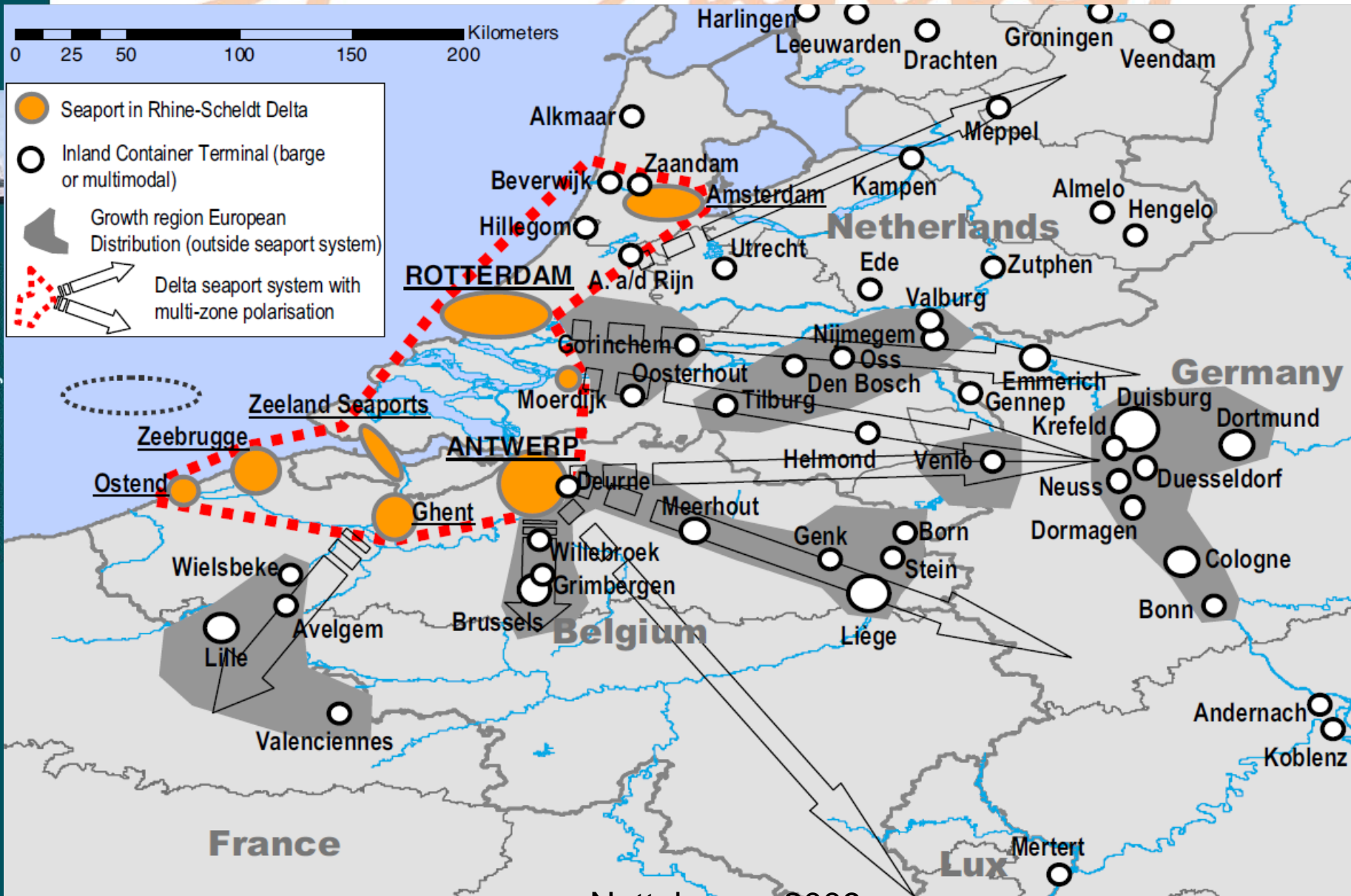


The centre of the world

Source:
based on
Unctad



Rijn-Schelde Delta is the main gateway to Europe

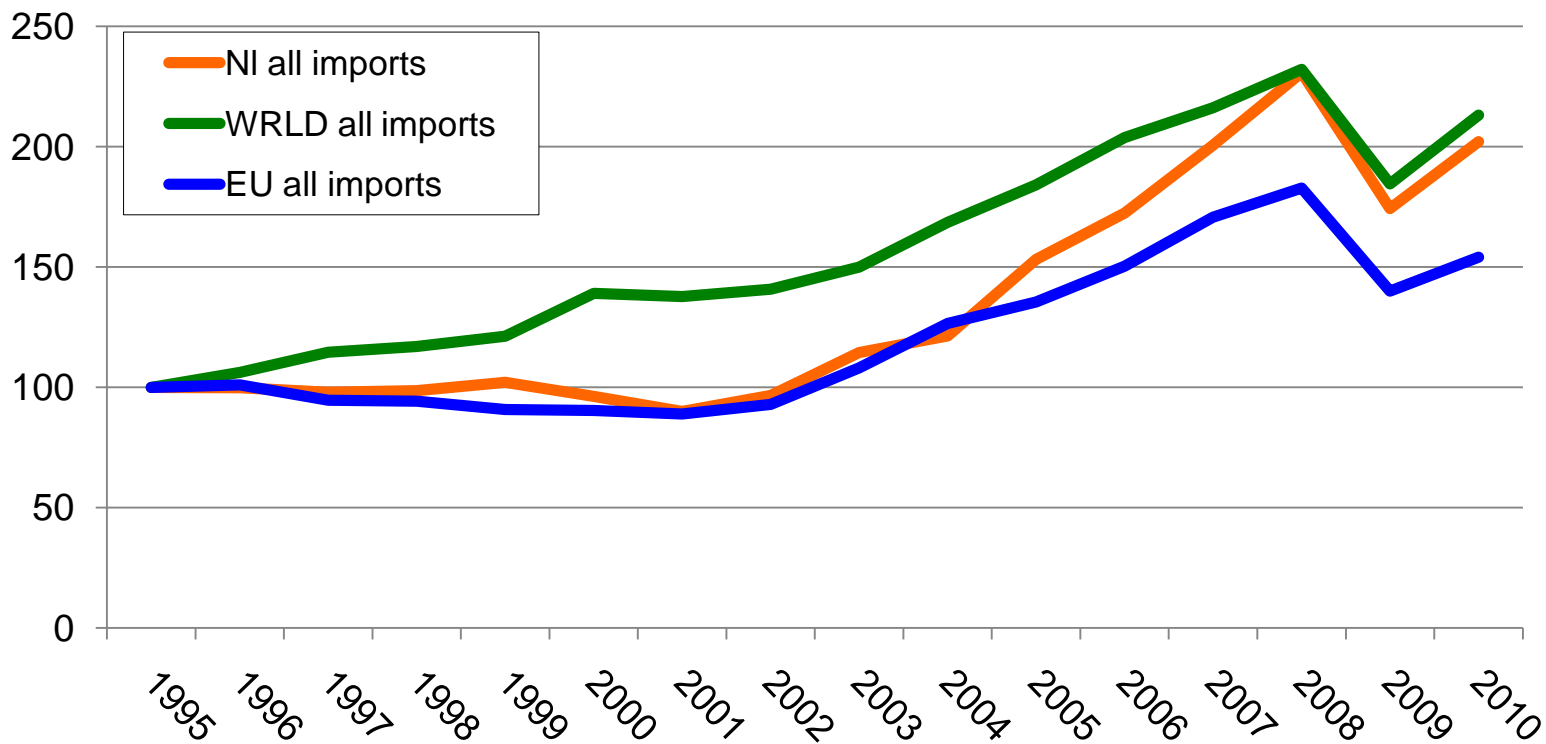


source: Notteboom, 2009



The Netherlands becomes more important for EU

Imports (index, price corrected)



Source: EUR based on Unctad, Eurostat



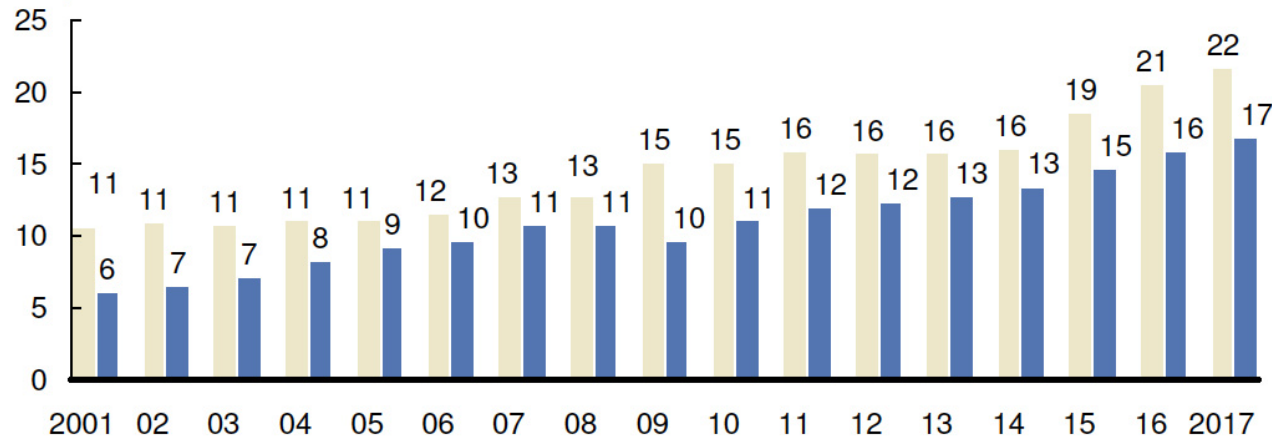
The bad news: we don't know what to expect

- Geo-political developments
 - EU, WTO, China
- Resources
 - Oil prices: will we have cheap transport in the future?
 - Further development of global sourcing?
- A new game; Internationally and locally
 - International: concentration in logistics, shipping and stevedoring
 - Local: Companies have international owners and take decisions about international networks, not about localities

Predictions PoR

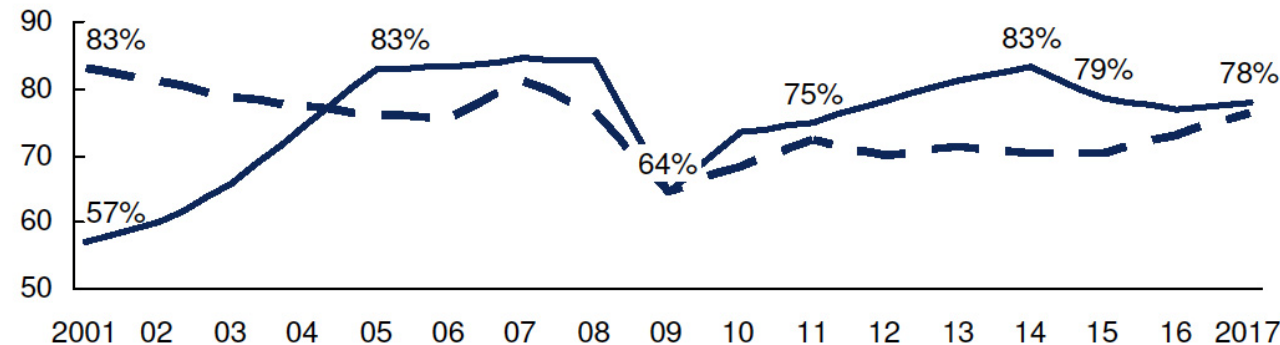
Capacity vs. volume

TEU, million



Utilization PoR

Percent



25% of growth is increased market share (portvision 2030)

DEEPSEA + SHORTSEA
BASE CASE

— PoR utilization ■ Capacity
- - HLH utilization ■ Volume

Utilization in 2017 for ALL terminals: low case 68%, high case 89%

Source: PoR / McKinsey



Predictions ECT/ Policy Research

- 14,5 million TEU in 2017
- Utilization rate 61% of MVI terminals
- Attracting extra volume is (nearly) impossible

The resulting difference seems small but has according to ECT a great impact



Conclusions

- The position of Europe and The Netherlands is very strong
- But the future is uncertain and planning for the future can be problematic
- Capability to adapt to different scenario's is important
- Solutions have to be found in flexibility.
- Both in contracts and infrastructure development.
- In co-operation between stevedores, port authorities and shipping lines.