

PORT OF ROTTERDAM

Challenges and opportunities In Port Development



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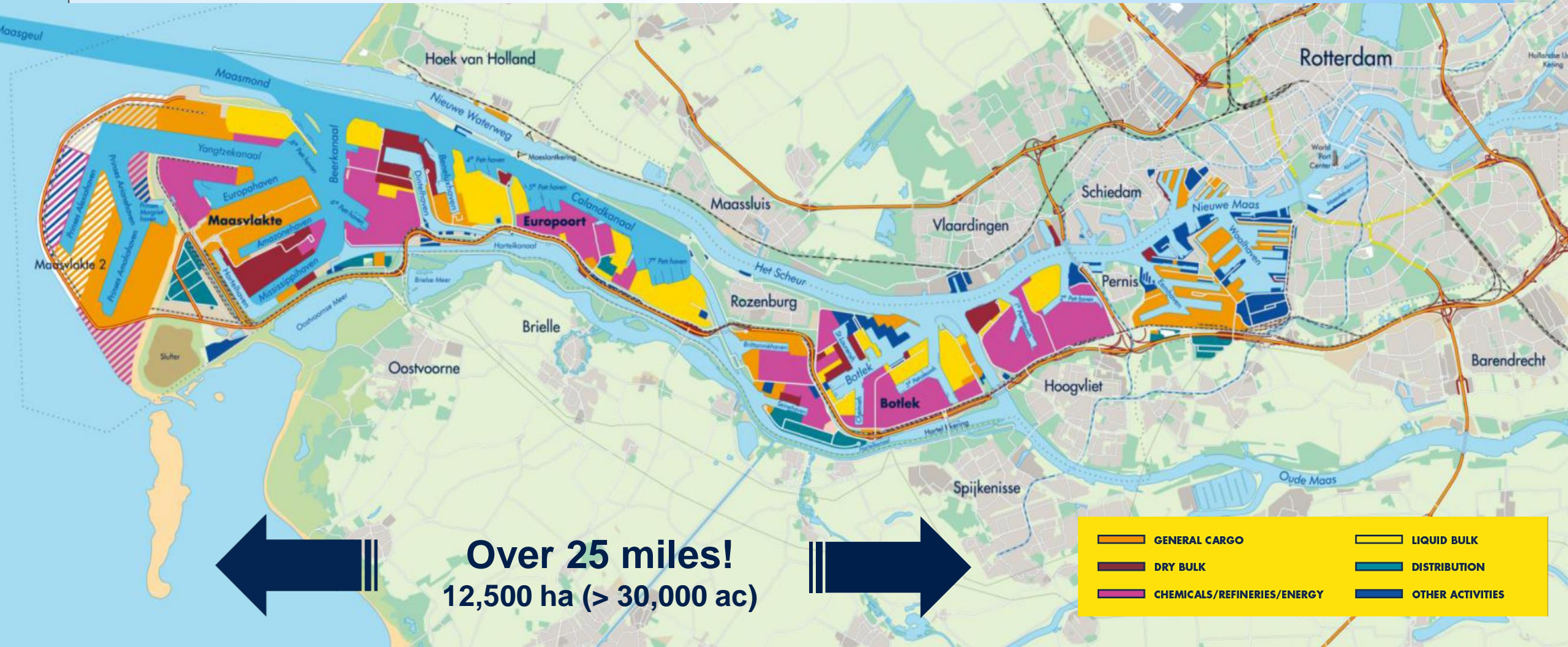


Welcome to the Port of Rotterdam

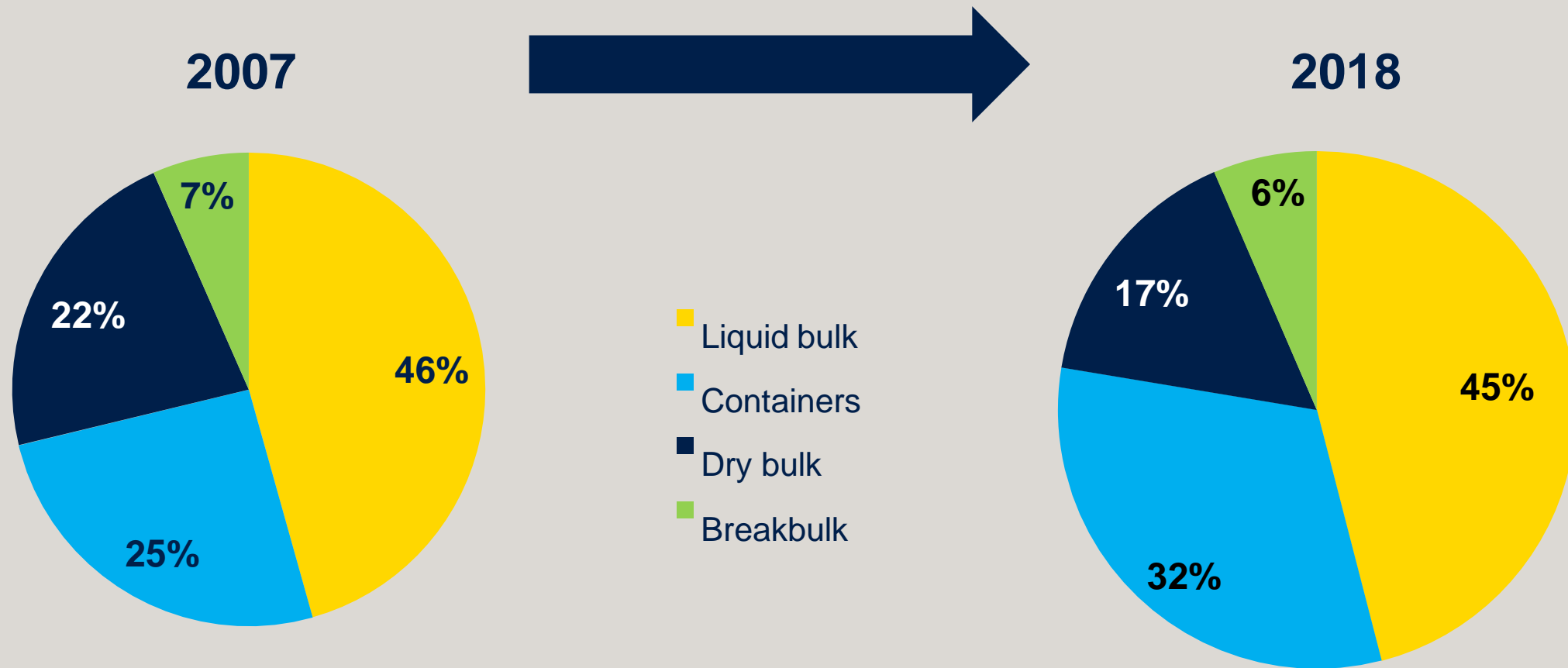
- Non-listed public ltd company
- Municipality (70%), State (30%)
- € 707 million revenues
- € 408 million investments
- 1,100 staff
- 29.476 vessel calls
- Main responsibilities:
 - Development, construction and management of the port and industrial cluster
 - Efficient & safe vessel traffic management
 - Business development



PORT AND INDUSTRIAL AREA



Increase of container volume and decrease of dry bulk goods in last decade



Source: HbR

DEDICATED DEEPSEA CLUSTER

Euromax

Shareholders:

- ECT: 65%
- COSCO: 35% **(Ocean Alliance)**

APMT-R

Shareholders:

- APM Terminals

ECTDelta Terminal

Shareholders:

- Hutchison Port Holdings
- NYK line (4,5%)
- Employees (2%)

Operational JV with MSC at DDN

Rotterdam World Gateway

Shareholders:

- DP World 30%
- MOL: 20% **(The Alliance)**
- HMM: 20% **(slot charter with 2M)**
- CMA-CGM*: 30% **(Ocean Alliance)**

APMT-MVII

Shareholders:

- APM Terminals
- Maersk Line **(2M)**


IMPACT OF LARGER CALL SIZES CHALLENGING

Quayside handling and hinterland traffic


DEVELOPMENT SEASIDE

- 21,000 TEU vessel (load/discharge in Europe: 40,000 TEU)
- Call size Rotterdam: 10,000 TEU → 6.000 MOVES
- Modal split: rail = 14% / barge = 31% / road = 25% / feeder = 30 %


HINTERLAND TRAFFIC




RAIL
1,400 TEU equals
19 trains



BARGE
3,100 TEU
equals 32
barges calls



ROAD
2,500 TEU equals
1560 trucks



FEEDER
3,000 TEU
equals 10
feeders calls

Challenge for terminals and barges, trains and trucks to cope with these peaks

Creation of one virtual terminal

Facilitating fast and cost efficient exchange of containers.



Role and focus of Port of Rotterdam is shifting

- More focus on serving end-to-end supply chains



- Understand verticals and shippers and forwarders
- Front runner: smartest port in digitalisation

BUSINESSES

HARDWARE, BUILDINGS, PERSONNEL ETC.

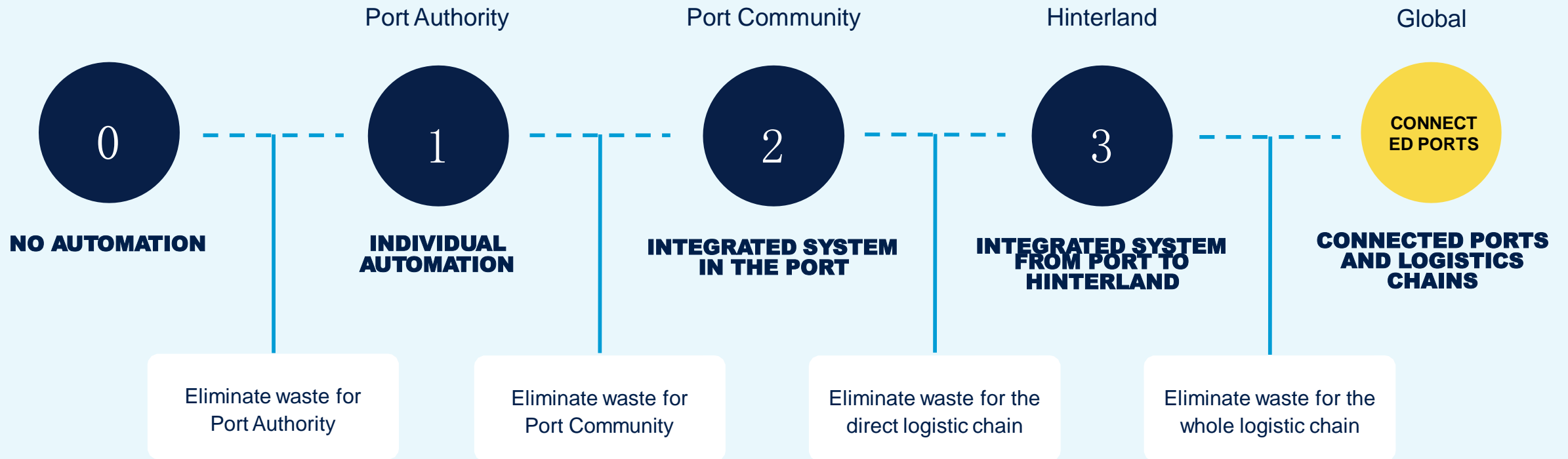
DIGITAL INFRASTRUCTURE



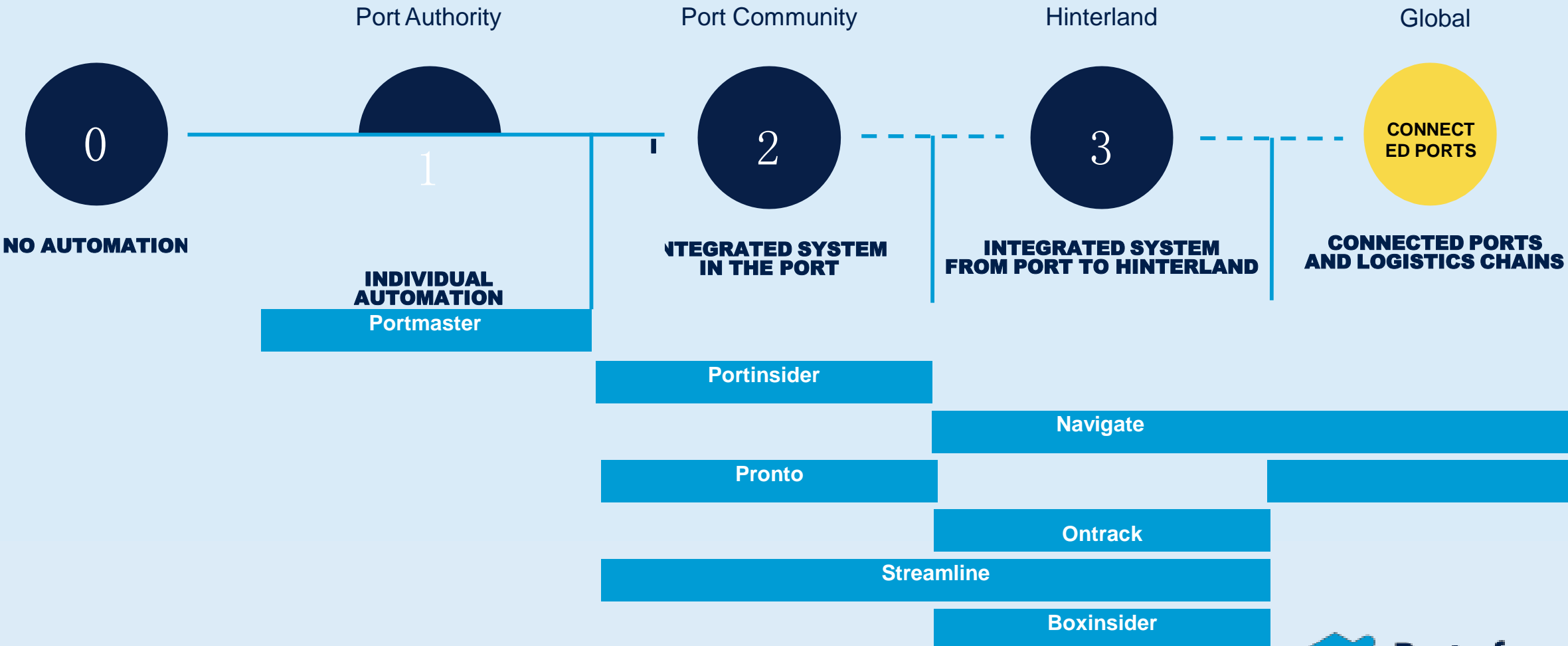
PORT OF ROTTERDAM

WATERWAYS, TERRAIN, (HARD AND DIGITAL) INFRASTRUCTURE

Step by step towards a digital port



Step by step towards a digital port



The gateway to continental Europe

Serving 500 million consumers

 Rotterdam hinterland



Well connected through Belt & Road



Logistics between companies are exceptionally safe and low-cost because a complete supply chain is concentrated in one location.



Shipping



Tank terminal



Refinery



Chemicals

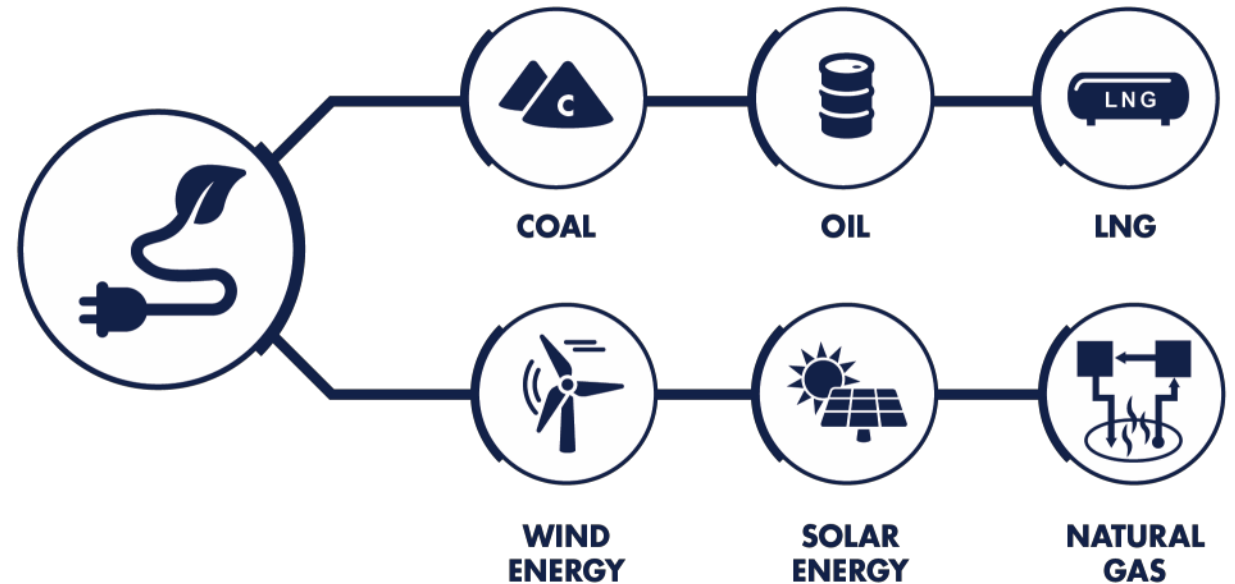


Distribution

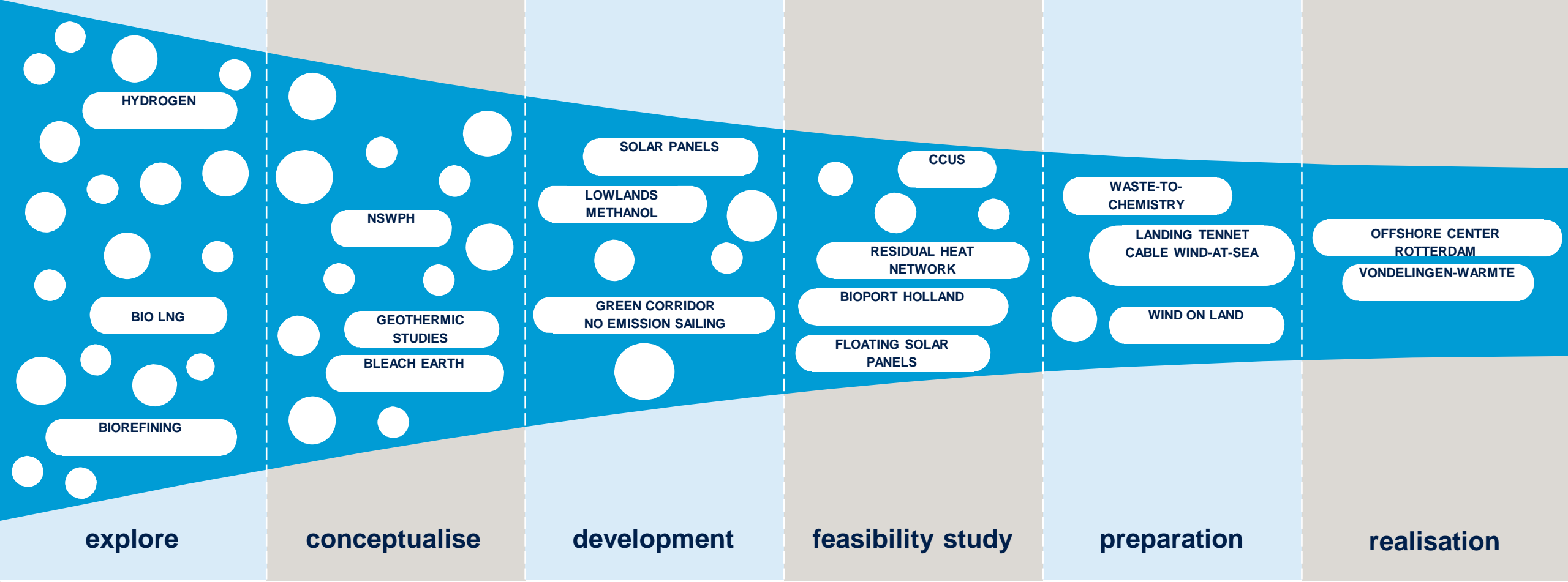
We believe very strongly in clustering activities

ENERGY TRANSITION

The Port of Rotterdam Authority is committed to combating climate change and wants to play a leading role in the global energy transition. The reduction of CO₂ emissions and efficient use of raw and residual materials are important tasks for the Port Authority

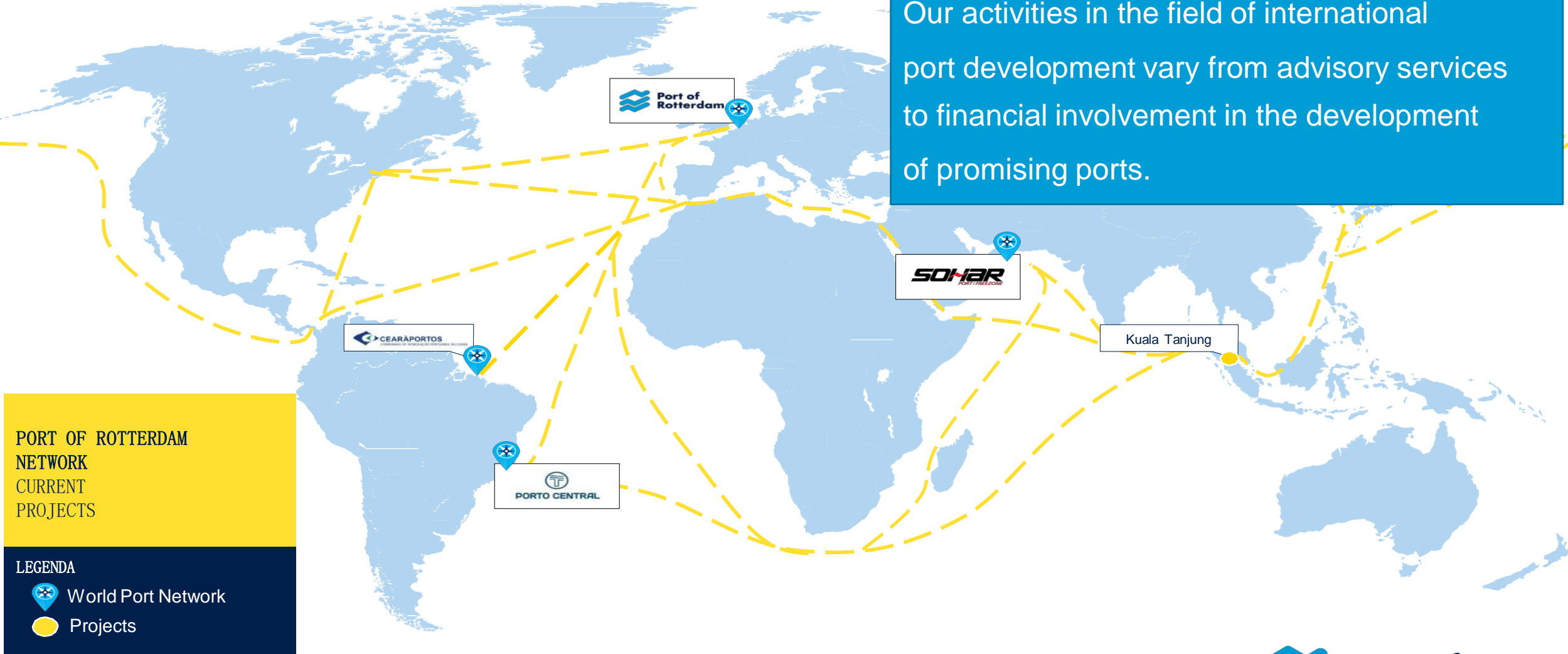


Funnel energy transition together with partners



INTERNATIONAL PORT DEVELOPMENT

Our activities in the field of international port development vary from advisory services to financial involvement in the development of promising ports.



PORT OF ROTTERDAM
NETWORK
CURRENT
PROJECTS

LEGENDA

- World Port Network
- Projects

Track record: Sohar, Oman

1 Sohar 2002



2 Sohar Today



Petrochemicals

- A petrochemical cluster developed around a 116.000 bbl/d ORPIC refinery
- Produces plastics and chemicals



Energy & Utilities

- 3 power plants with a total capacity of \pm 1,500 MW for the port and the national grid
- Desalination plant



Metals

- Includes iron ore processing plant and production facilities for iron, steel, and aluminum

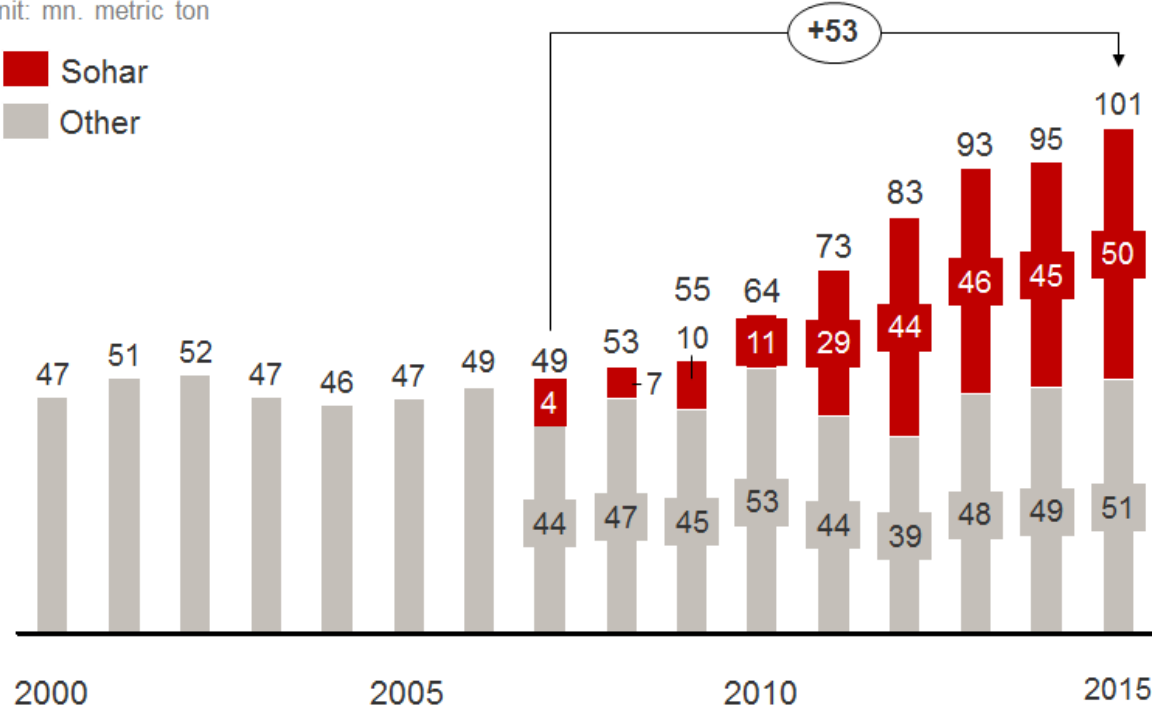
Sohar contributes to Oman's ambitions

1 Strong trade growth

Sohar has helped double Oman's total trade flows

Oman Trade Growth (Exports + Imports)

Unit: mn. metric ton

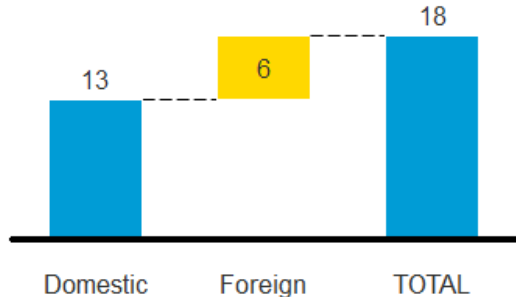


2 Investments & jobs

> 20,000 jobs, USD 20 bn. invested

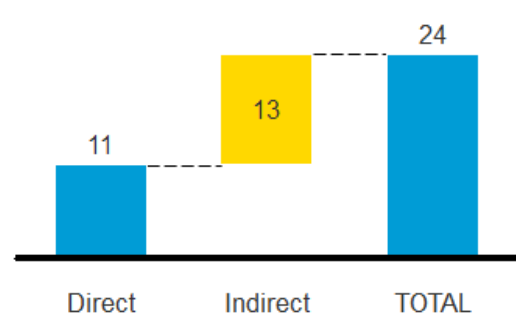
Private investments

USD billions



Employment

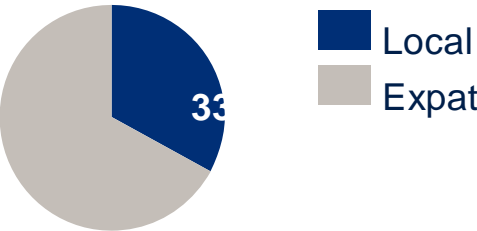
'000 people



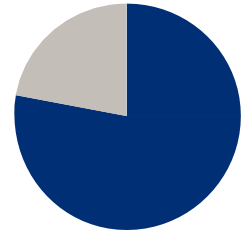
3 Capacity building

More local exec. employed

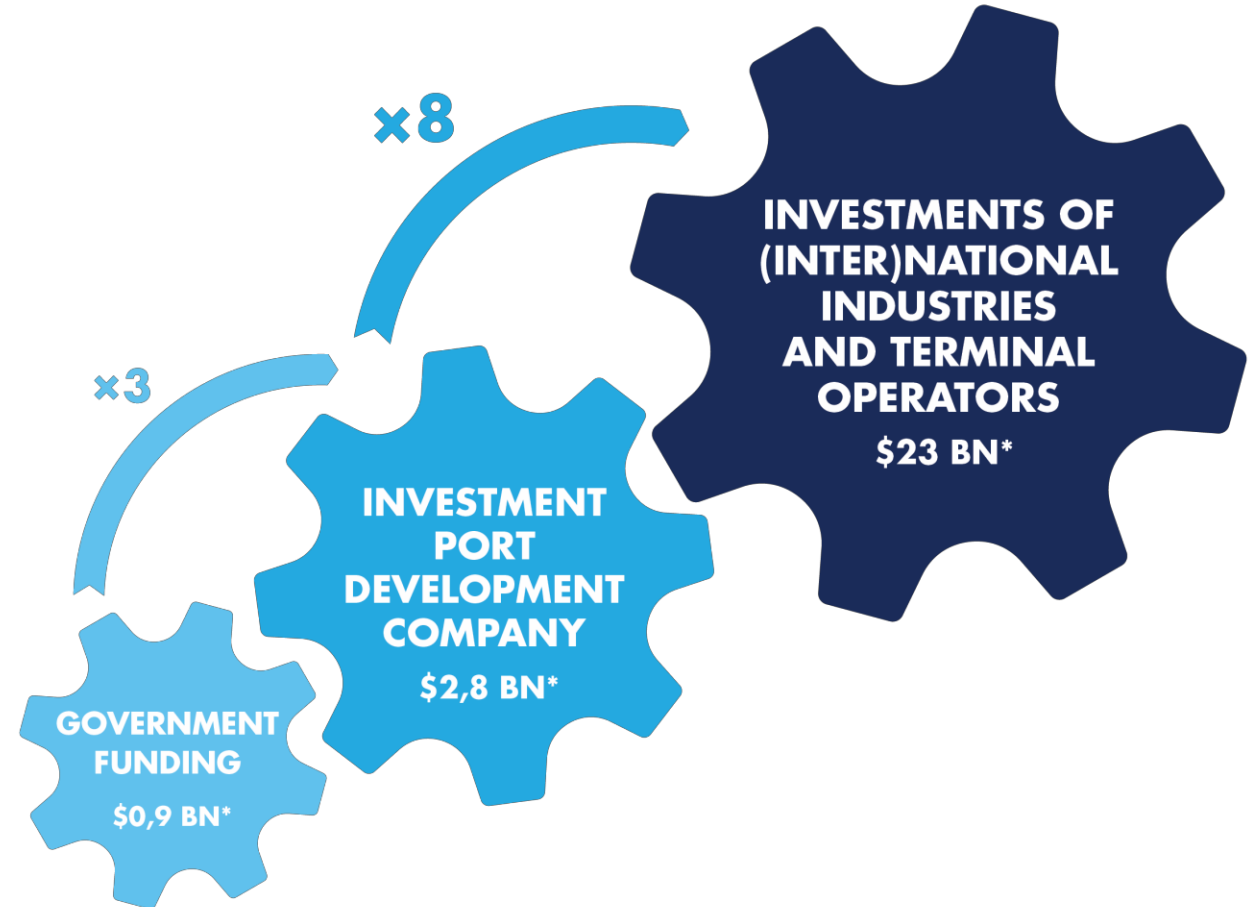
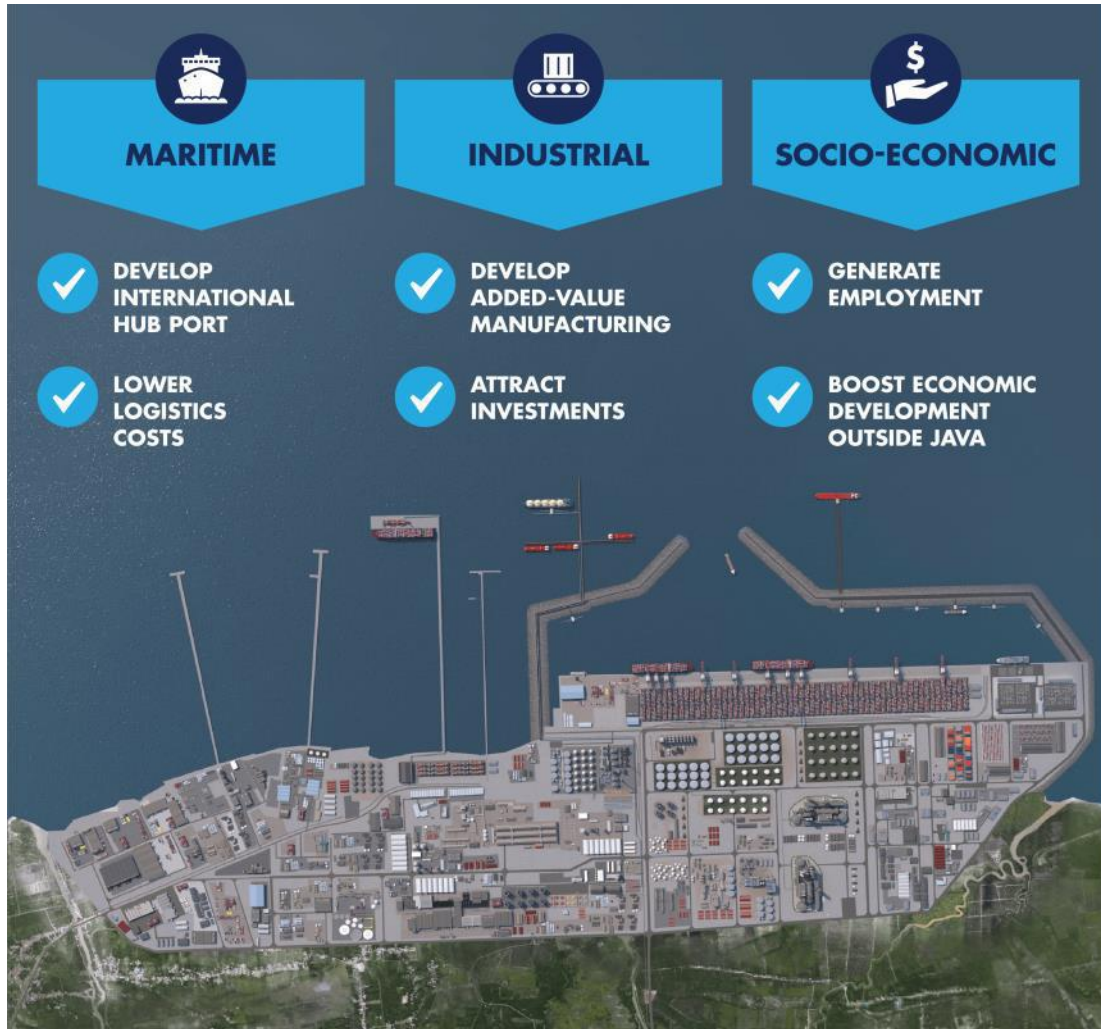
Management Team 2003



Management Team 2019



Kuala Tanjung, Indonesia



*price base 2017

THANK YOU

