

BREKBUK PORTS HEAD-TO-HEAD

How Are Breakbulk Ports Reacting to Changes Across the Sector?



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Port of Halifax & Port of Sheet Harbour Terminals

- Multi-purpose Marine Terminals handling a variety of vessel operations – import and export, RoRo, Heavy Lift, Rail to Inland on CN, “breakbulk+”



Hall 4 Q30 - your BreakBulk Supply Chain Partners from Canada



“Environmental” Considerations the “P.E.S.T.L.E.” Big Picture

- Political
- Economic
- Social
- Technological
- Legal
- Environmental Sensitivities
- “Social License to Operate”



A commitment to physical and technological Infrastructure that supports the Customer



Changing with the times

- Improved Supply Chain Visibility through Port Operations Centre at: www.portofhalifax.ca
- Investment in technological infrastructure to complement upgrades and modernizations to multi-purpose terminals
- Flexibility to respond to changing commodities and modal transfer combinations
- Take advantage of domestic backhaul opportunities and other unused capacity in a very full North American system

How is Valenciaport preparing for the future?



The Port Authority of Valencia manages three ports

SAGUNTO: 5.70 million Tons
52,401 TEUs
271,155 Vehicles

VALENCIA: 67.19 million Tons
4.77 million TEUs
1,029,263 Passengers
616,960 Regular Lines Passengers
412,328 Cruise Passengers
523,797 Vehicles

GANDÍA: 0.34 million Tons
52,890 Regular Lines Passengers

VALENCIAPORT: 73.25 million Tons
4.83 million TEUs



Direct area of influence

Within a **350 Km** radius from Valencia:
55% of Spain's GDP
51% of the country's working population
42% of the territory

The Port Authority of Valencia competitive offer: Gate Port at the service of import/export trade

BILBAO

ZARAGOZA

MADRID

VALENCIA

MURCIA

Extended area of influence

A **2000 Km** radius from Valencia
comprises Spain, Portugal, France,
Italy, Morocco, Algeria, and Tunisia

As a hub for the Western Mediterranean,
Valenciaport efficiently distributes goods
over a radius of 2,000 km, both in Southern EU
countries and in North Africa

Intermodality and Railway Corridors

Railway Corridors

Madrid – Center – Portugal
Mediterranean – Atlantic
Mediterranean



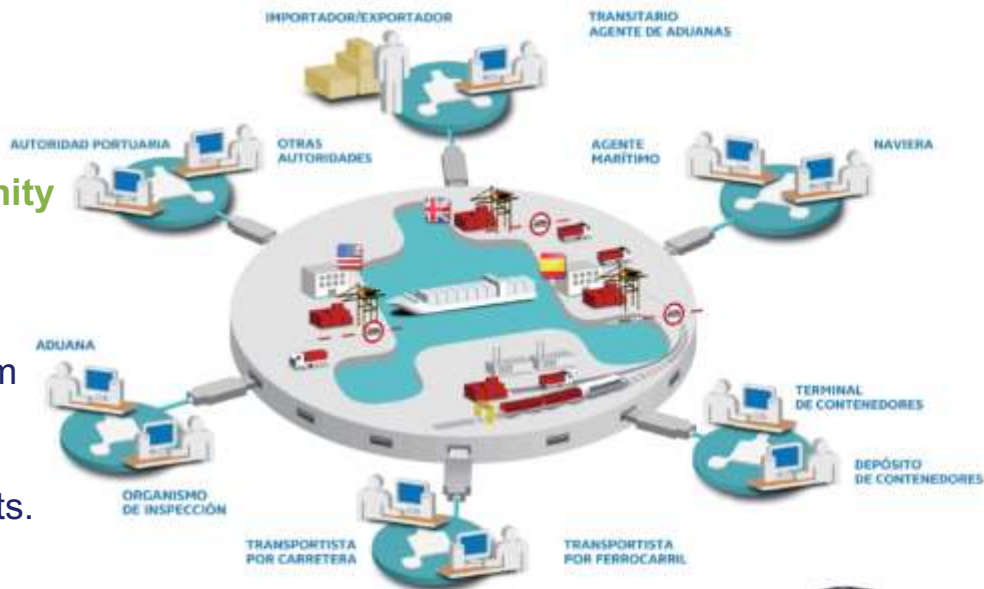
Technological Innovation to improve the services of our clients

valenciaport PCS PORT COMMUNITY SYSTEM

ValenciaportPCS is the **Port Community System of Valenciaport**.

It belongs to the Port Authority of Valencia. It is the e-commerce platform that is used by the Port Community to exchange data and administrative, commercial and operational documents.

On-stop-point for more than 700 companies



The most important Terminals in the Port of Valencia

- 1 Container Noatum-CTV
- 2 Container MSCTV
- 3 Container APM Terminals
- 4 Ro-Ro / Vehicles
- 5 Ford Terminal
- 6 Liquid bulk (Petrol products)
- 7 Liquid bulk (Asphalt, Oils, Molasses)
- 8 Solid bulk (Cereals)
- 9 Solid bulk (Cement)
- 10 Passengers and Cruises Terminal (Trasmediterránea)
- 11 Passengers Terminal (Balearia)
- 12 North Extension



The most important Terminals in the Port of Sagunto

- 1 Vehicle Terminal
- 1b TOYOTA Vehicle Logistics Centre
- 1c Other spaces for vehicles
- 2 Regasification Plant
- 3 Multipurpose Terminal
- 4 Multipurpose Terminal
- 5 Multipurpose Terminal
- 6 Multipurpose Terminal
- 7 Fertilizers





Port of Sagunto: reliable breakbulk option in Med



Port of Antwerp

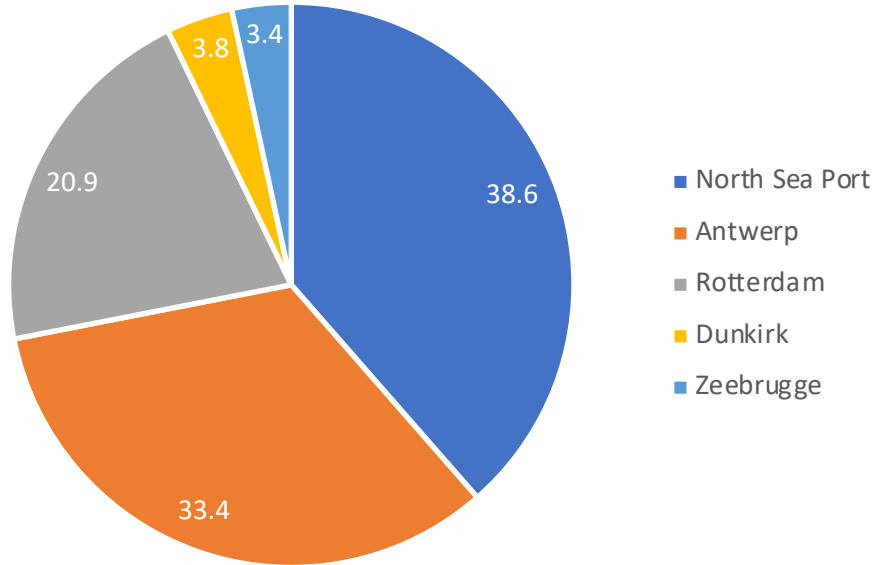
Morgane Hanssens
Key Account Manager
Shippers & forwarders





Port of
Antwerp

Major breakbulk port

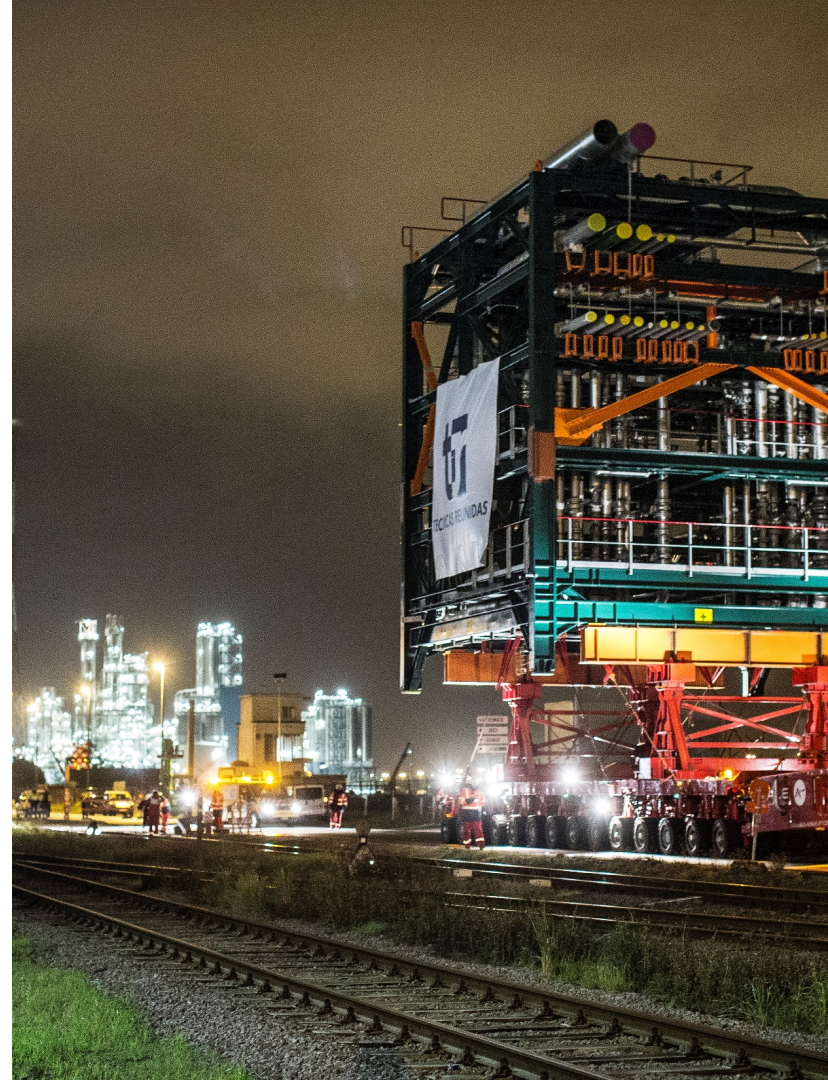




Together we get things done

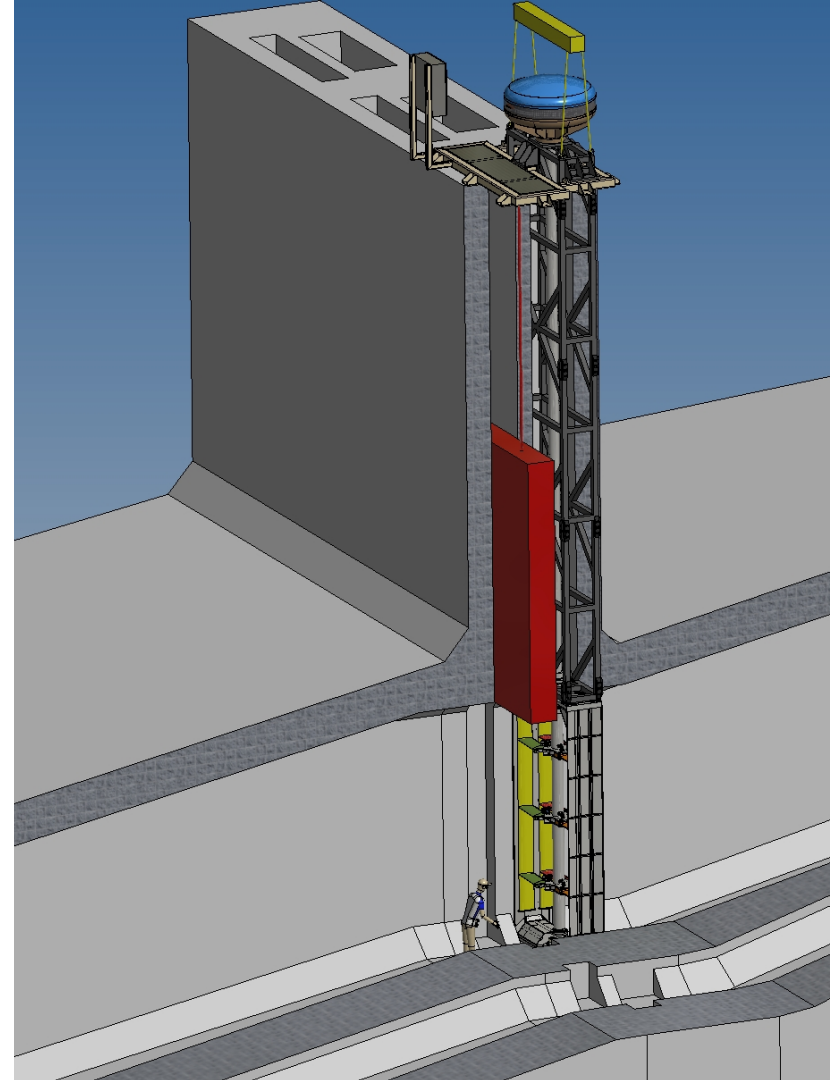
The port of the future

- Project cargo & heavy lift



Port of the Future

- Innovation



The port of the future

- Digitalisation



A P I C A



Port of Antwerp

Your breakbulk home port



**Port of
Antwerp**

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EUROPE'S

1

NO.

STEEL PORT

IRON ORE

SCRAP

COILS

SLABS

PLATES

2018

6.4

MILLION TONS

GENERAL
CARGO

EXPERT IN

4

TYPES OF

BREKBUK
CARGOES

13

STEVEDORING
COMPANIES

21

TERMINALS

500

MILLION
CONSUMERS
WITHIN
24 HOURS
REACH

BY ALL
MODALITIES

Breakbulk carousel : creating room for growth

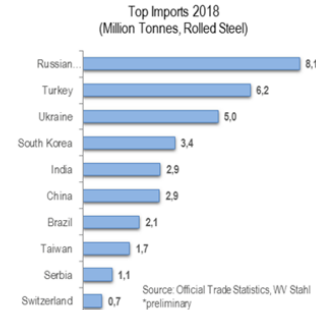
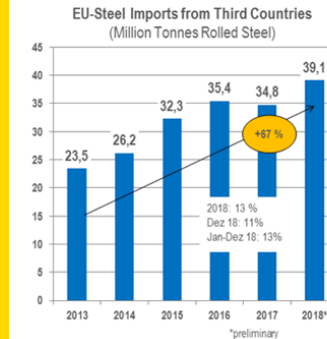


Trade barriers : protectionism on the rise

- US negative trade balance with EU, unfair: import tariffs of 25% on steel and 10% on aluminum from the EU (Section 232 of the Trade Expansion Act). Also trade measures against other countries.
- **Impact on US:** Steel keeps being exported to the US but it has become more expensive for US buyers.
- **Impact on EU:** Steel dumping from Third Countries.
- **Reaction EU:** Safeguard measures to prevent steel dumping. This limits further increase in volume of steel arriving at EU ports.
- Growing protectionism (for example US-China trade war).



EU Steel Import: Intensive Surge



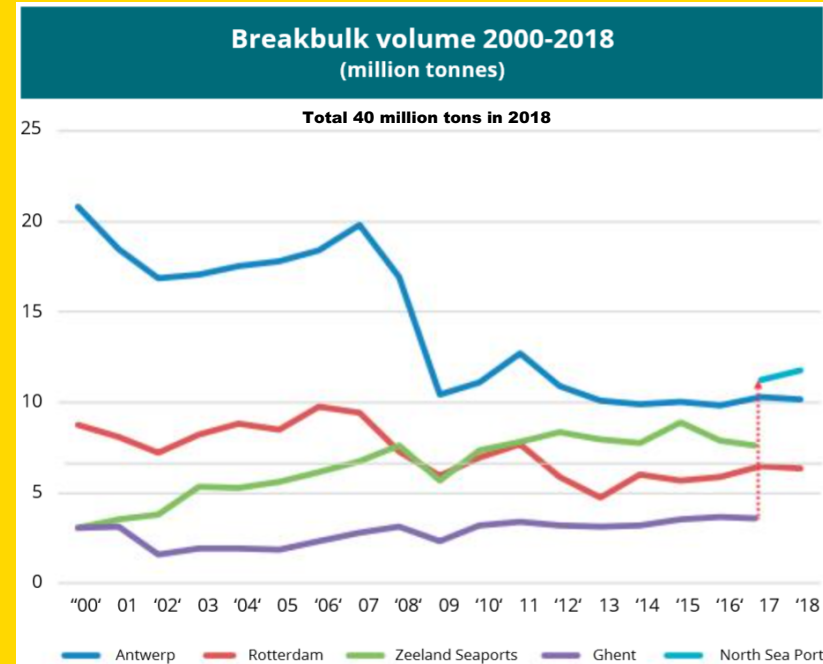
Stahl Wirtschaftsvereinigung Stahl

Source: Official Trade Statistics, WV Stahl

Trade conflicts never had any positive impact on the economy

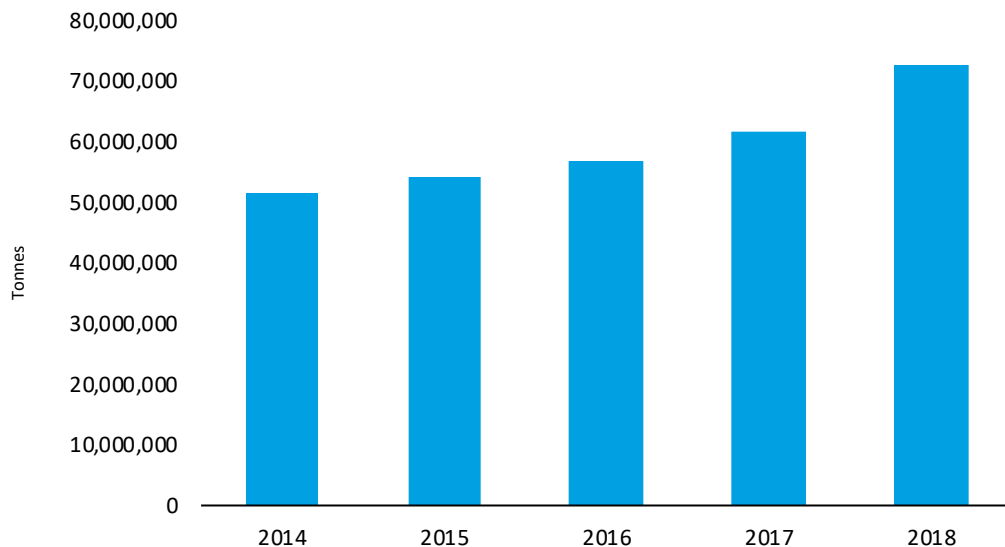
- Large breakbulk ports like NSP, ANR and RTM feel the results of trade conflicts in their (steel) cargo volumes. But despite the recent trade disruptions the Port of Rotterdam continues to see many opportunities in the steel market.
- Because of its broad portfolio, from steel to HLPC, non-ferrous metals, forest products and automotive.
- Rotterdam is more resilient than certain other ports depending solely on one commodity.

Trade conflicts never had any long term positive impact on the economy. Ports benefit from free trade and normalized trade relations.



Source: Flows (2019)

Total cargo handling in the Port of Gdańsk



* Including Port of Gdańsk and Port of Gdynia

Growth rate of cargo handling
in the Port of Gdańsk in 2018:

+20.7%

Total value of ongoing investment
projects:

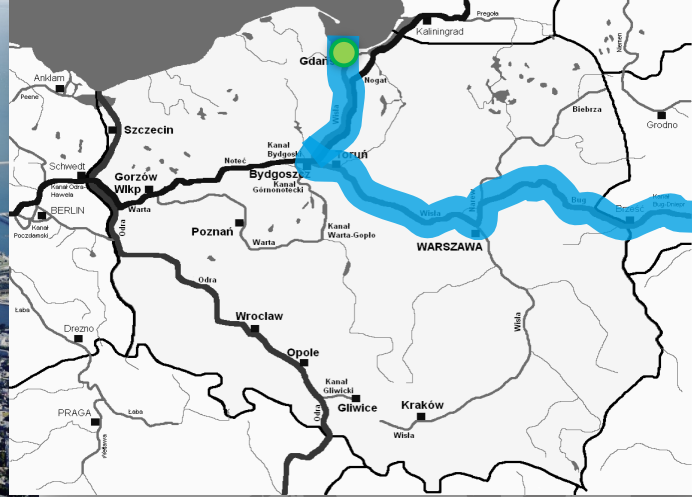
1 bln €

The Central Port



- 9 terminals
- Deepwater Port
- Investment value – ca. 2.5 bln €
- Completed technical concept
- Implementation time – up to 10 years

Ensuring navigability of the **Vistula River**:



Connecting
Baltic Sea (Gdańsk)
and
Black Sea (Odessa)