

# Port Authority Roundtable Discussion

## Global Trends from a Port Management Perspective



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# The Port of Hamburg



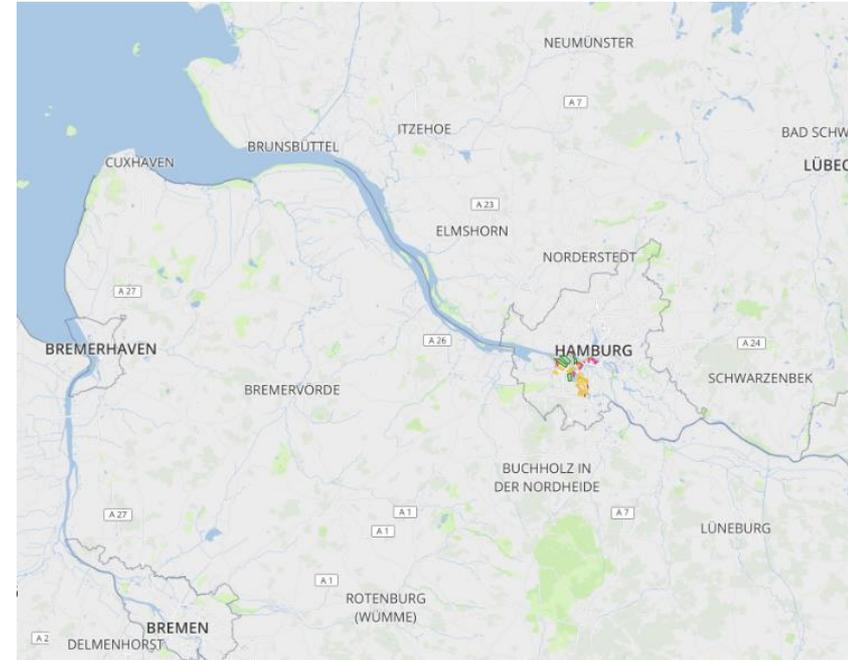
City port with access to 5.3 Mio. people and a distance to the North Sea of about 120 km



TOP20 container port worldwide and a leading European port for trade with China



State-of-the-art infrastructure and intelligent traffic control thanks to smartPORT apps



Source: Hamburg Hafen Marketing (2017)

Global trends that affect Port Authorities are manifold.

What are their implications?



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What are their implications?

Disruptive Business Models

Artificial Intelligence

Digitalization

Sustainability

Investment

EU China Relations

climate change

Infrastructure

Expanding Cities

**Increasing Vessel Sizes**

Increasing Vessel Sizes

One Belt One Road

Cyber Security

Urbanisation

3D Printing

Greenports

New Work

Brexit

Startups

Alliances

Automation

**New Silk Road**

New Silk Road

Decarbonisation



Global trends that affect Port Authorities are manifold.

1



## 21<sup>ST</sup> CENTURY SILK ROAD

China's One Belt, One Road Policy  
and its implications for the Port of  
Hamburg.

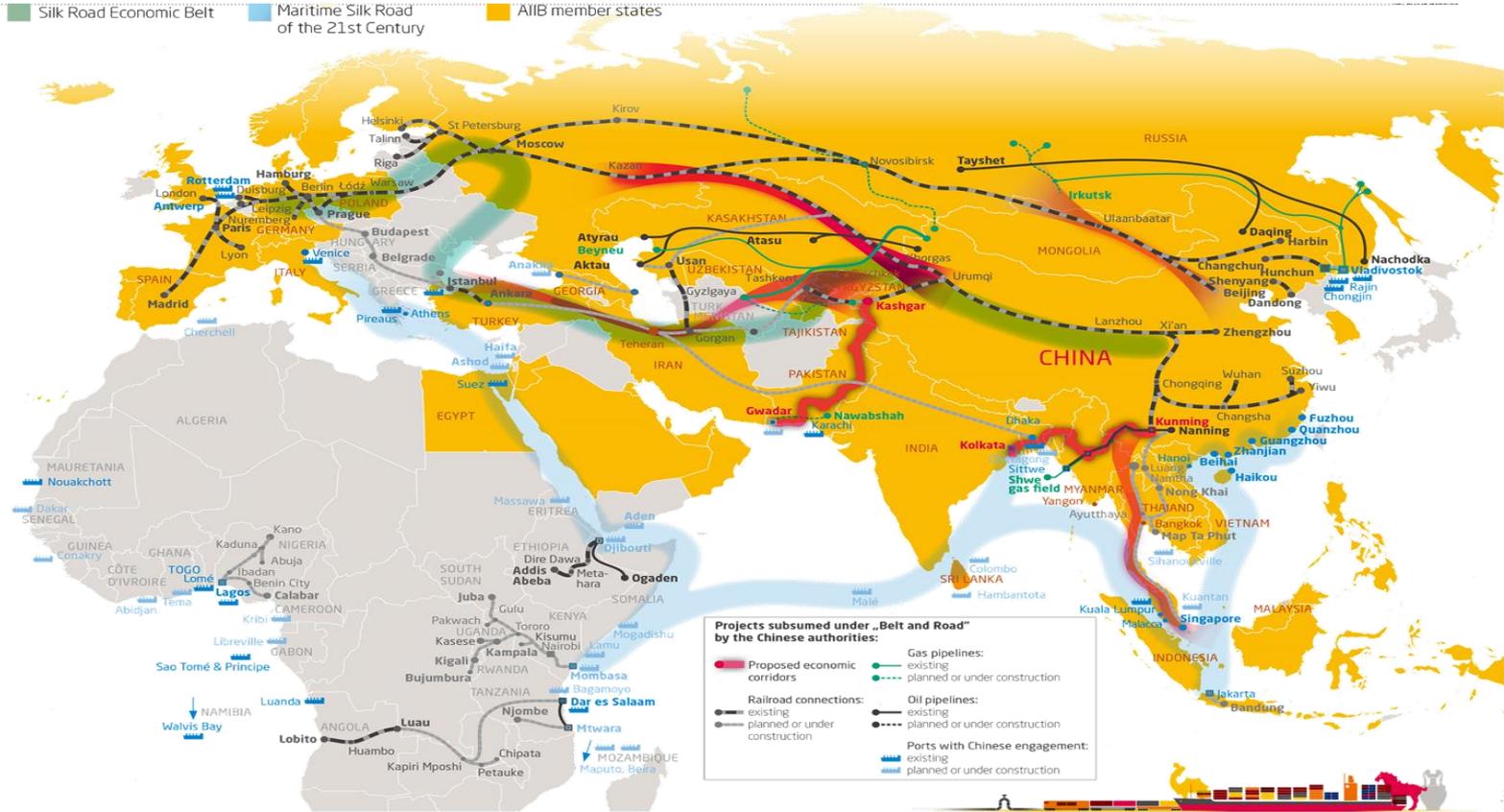
## SUPER SIZE ME

Future oriented infrastructure  
investment in the light of growing  
vessel sizes.



2

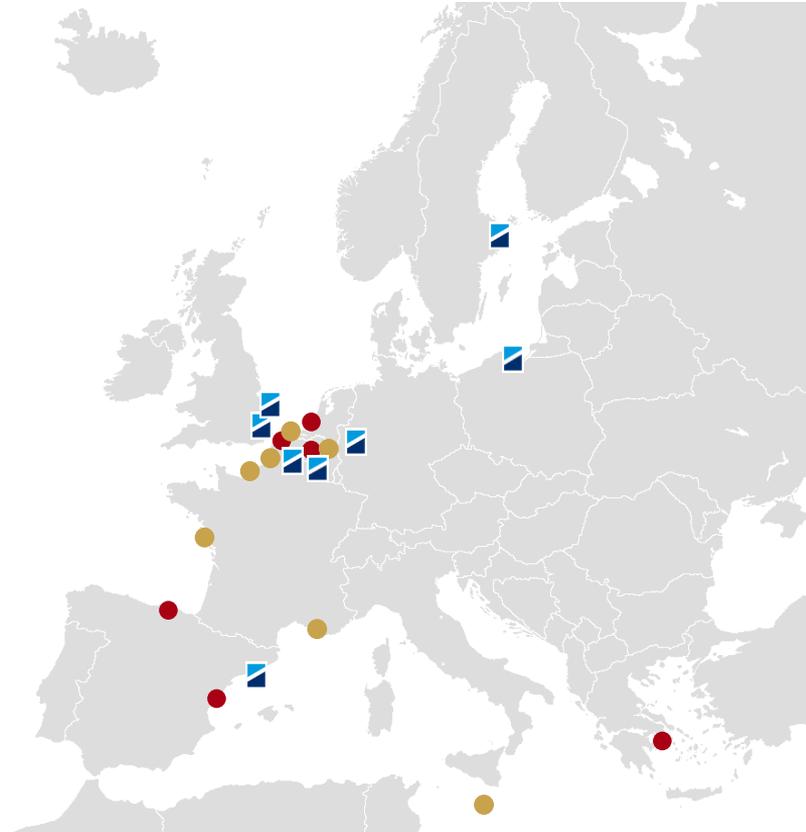
# China's aim to build a global infrastructure network.



Source: MERICS research

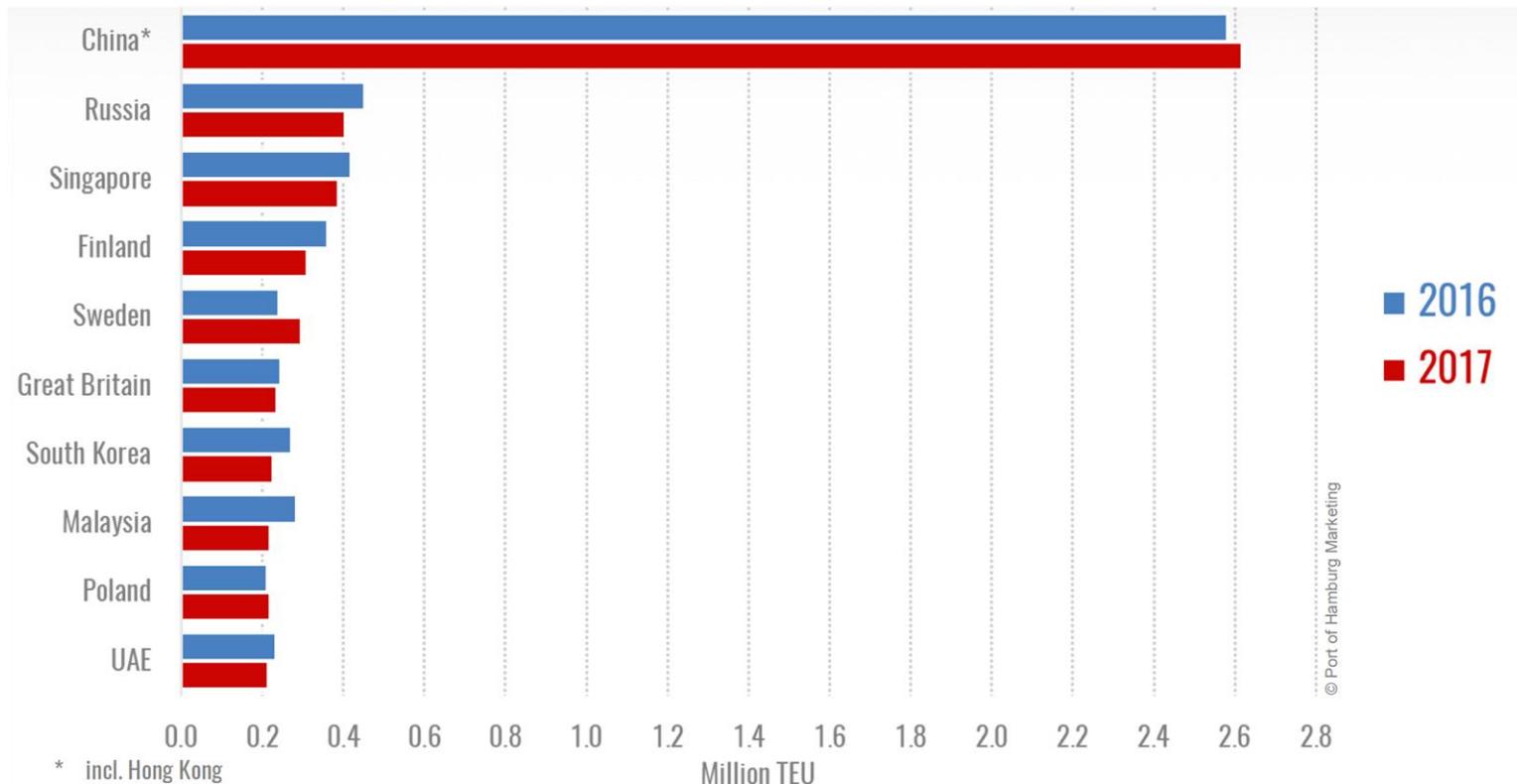
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China's OBOR policy and its implications: 15% to 20% of all European port assets have a Chinese majority.



# China's OBOR policy and its importance for the Port of Hamburg

Hamburg is „Han Bao“. And its port is China's gateway to the European Market.



## Fully automated container-terminal and logistics-hub

ZPMC Germany GmbH and  
CCCC (China Communications Construction  
Company Ltd.)



Linked in various ways: Hamburg is already and will continue to stay part of the Silk Road.

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**Geographically well located and a reliable partner for trade**



**Long tradition of close relations with China**



**Lively exchange beyond trade, e.g. science and technology**

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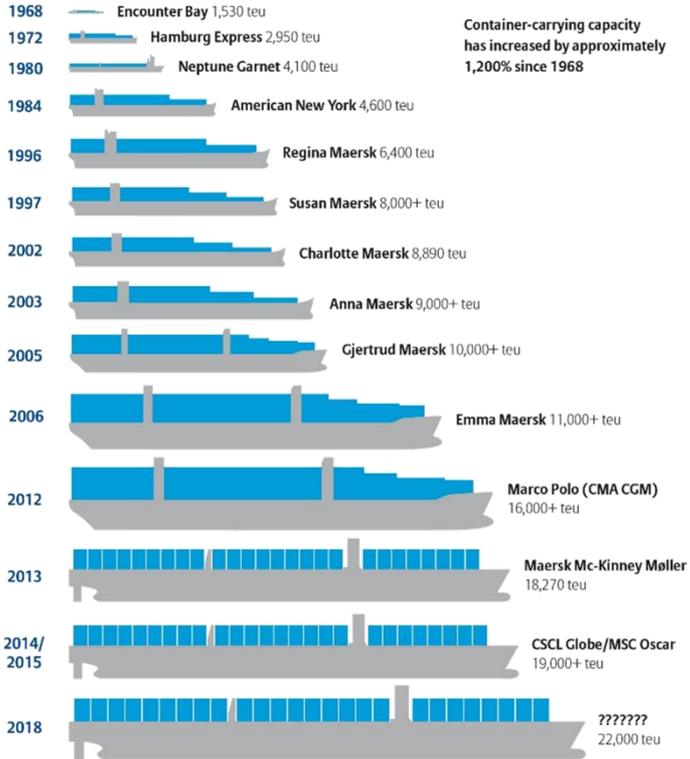
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2

Loading capacity has increased by approx. 1,200% in 50 years.



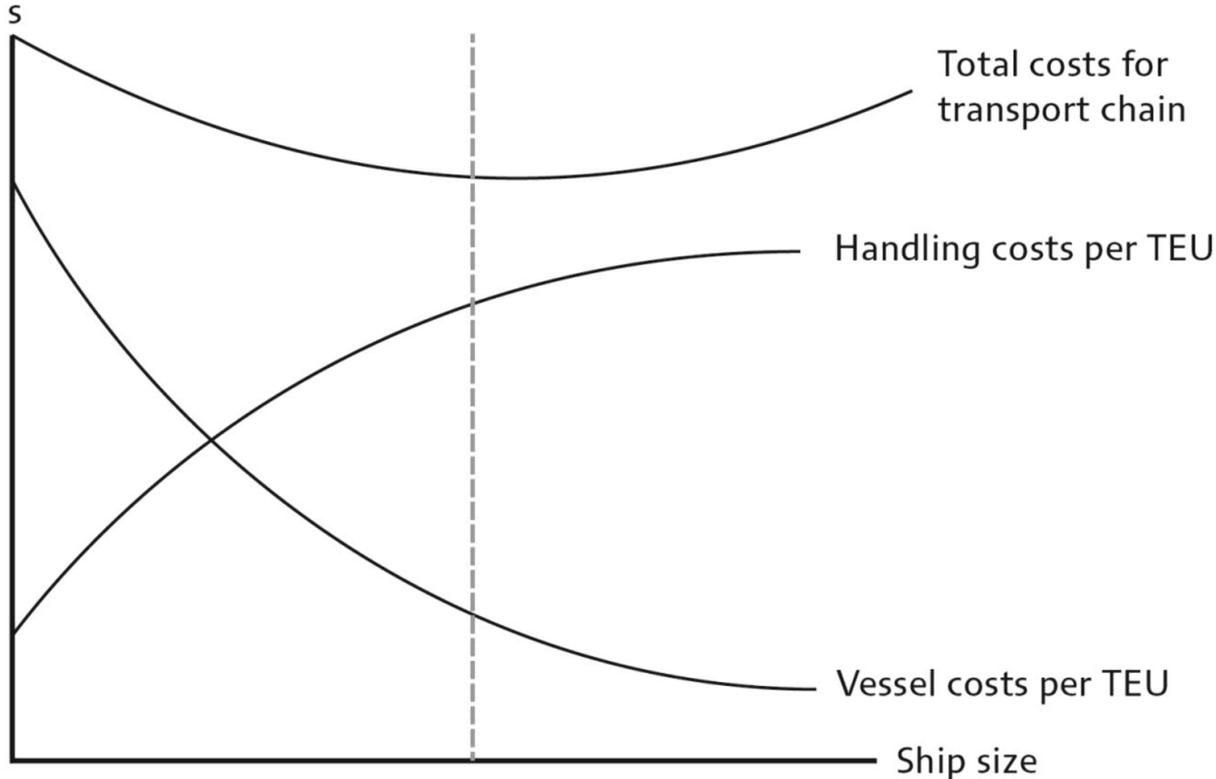
Ever-growing vessel sizes implies challenges with regard to

1. the sustainability of infrastructure investments,
2. operational and hinterland peaks,
3. supply chain risks.

Graphic: Allianz Global Corporate & Specialty.  
Approximate ship capacity data: Container-transportation.com

# Infrastructure investments: The negative externalities of growing vessel sizes.

**Further increase of maximum container ship size would raise total transport costs.**

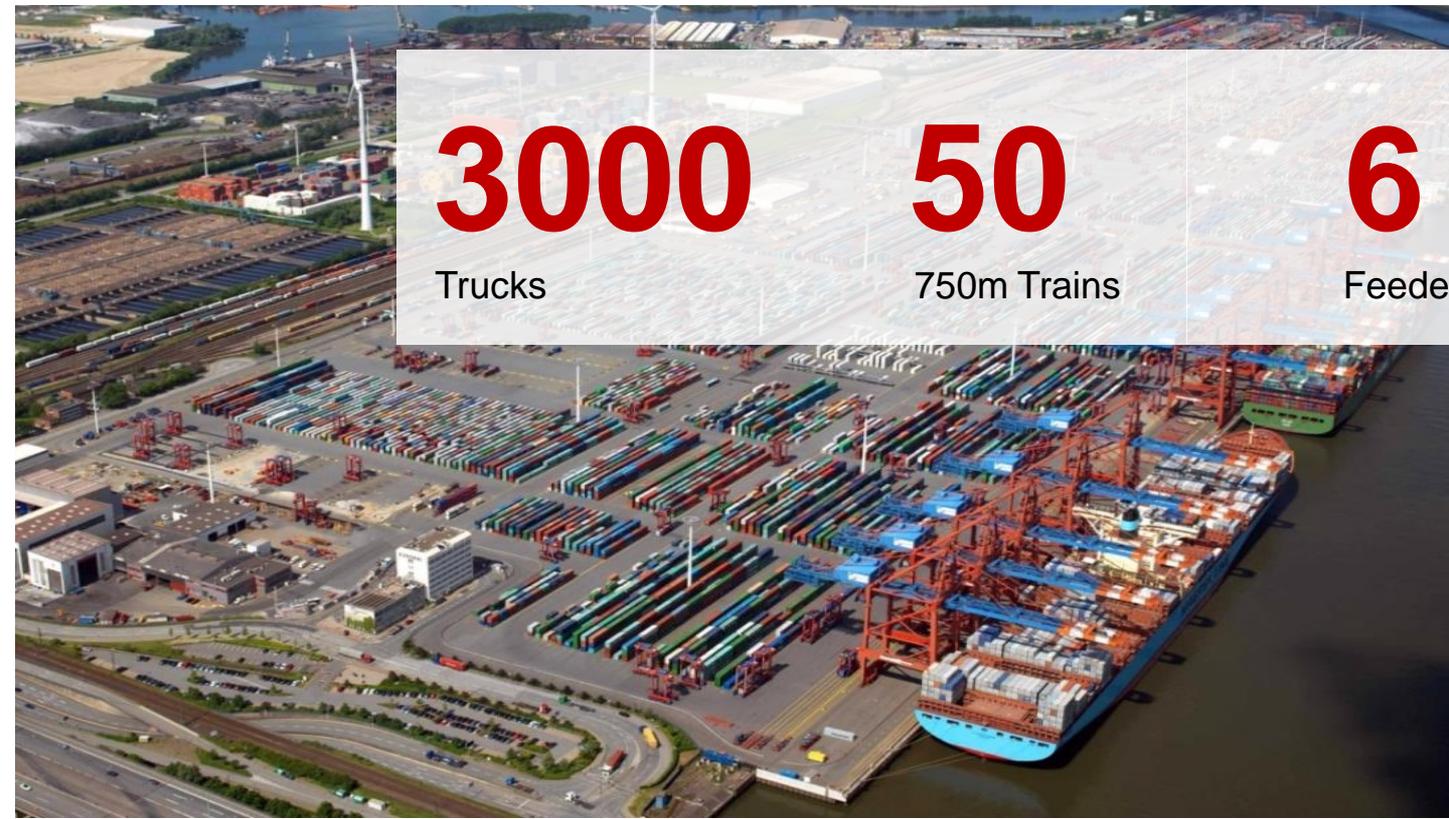


“The potential cost savings to carriers appear to be fairly marginal, but **infrastructure upsizing costs could be phenomenal.**”

Source: The Impact of Mega-ships, OECD/ITF 2015

Operations: Bigger ships lead to bigger peaks in ports.

Ship to shore peak mean ever greater challenges for terminal operators and hinterland connections.



**3000**

Trucks

**50**

750m Trains

**6**

Feeder Ships

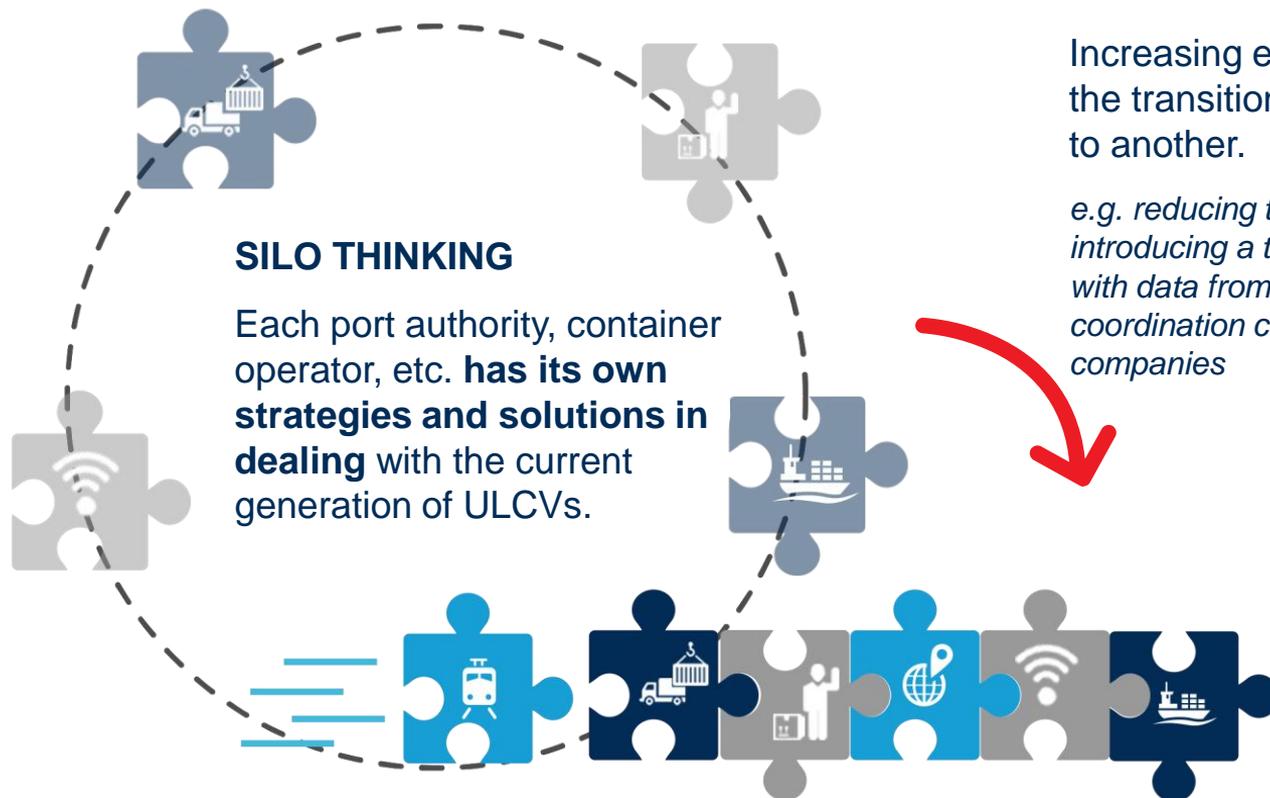
**2**

Barges

Navigating and maneuvering a 20,000+ TEU ship safely poses special nautical challenges.



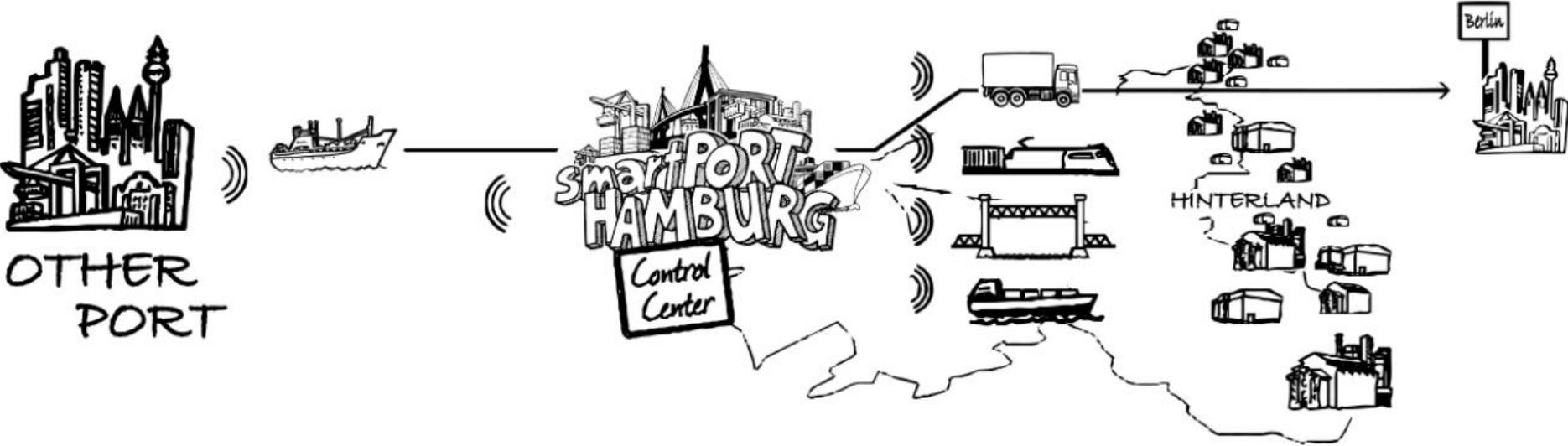
New technologies help each maritime player to significantly improve its own performance over the last decades.



Increasing efficiency by improving the transition from one stakeholder to another.

*e.g. reducing truck waiting time by introducing a truck slot-booking system with data from terminals, vessel coordination center, and trucking companies*

# Our Vision: Ports as honest and trusted brokers of data.



Thank you for your kind attention!



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Member of Management Board  
Head of Corporate Functions

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