

Coastlink

7th Annual Conference 2010

Port of Antwerp, Havenhuis, Entrepotkaai

Tuesday 14th and Wednesday 15th September 2010

Greater intermodality the key to success

Cargo moves from door to door, not quay to quay, a fact that the road transport industry has always appreciated. Shippers care little about transport modes: they want punctual, flexible, safe transport at the cheapest price – oh, and for many, does it come in green too?

It could be argued that shortsea shipping lines, ports and railfreight operators have for too long operated in isolation, not really talking to each other more than was necessary. Fortunately this has changed dramatically in recent years, driven by greater private involvement in terminal and rail operations and the introduction of young marketing talent. But there is still a long way to go if shortsea shipping is serious about building market share.

The European Commission now recognises this and is actively encouraging intermodality. Marco Polo funding may soon be available to speed the process. But there is still a lot that can be done on a purely commercial basis.

Coastlink sees as its main function the provision of opportunities for the shortsea industry to meet, talk and learn, to make new friends and to renew old acquaintances. The goal is greater collaboration between the various service providers and the development of new and improved services. Success is when participants in our conferences identify traffics that lead to new or expanded business. New services that relieve the pressure on Europe's road systems may be a politician's or bureaucrat's dream but for Coastlink members, those services that can be made to work are extra cash in the bank.

In this conference, kindly hosted by the Port of Antwerp, we will hear how ports are helping themselves. It's no longer sufficient to build new

berths and wait for the customers to come. Captive customers are highly sought after and logistics centres located on-dock or nearby mean more containers handled on the quays.

We will also hear about ports taking an active role in expanding their respective hinterlands. Instead of serving just the Benelux and Germany, the Port of Antwerp is now an intermodal gateway to many countries extending from the Baltic Sea to the Mediterranean and Eastern Europe. Investment continues in improving rail and barge connections to satisfy shippers' demands. Are there lessons to be learned?

But to return to the heart of Coastlink: shortsea shipping and feeder operations. The roller-coaster ride continues. The global recession meant falling cargo volumes and much belt-tightening but it also meant falling charter rates and that was really good news for all but the hapless shipowners and shipbuilders in Germany and elsewhere.

The recession has been a body blow for the European road haulage industry too and once down, further kicking came from Brussels with the European Working Time Directive being applied to driver hours and national governments in some cases introducing weekend restrictions and road charging. Shortsea shipping lines have benefited, as we will hear, and now carry much more cargo, a great deal of it perishable, from North Africa, the Mediterranean and Iberia to Northern Europe. 45ft pallet-wide containers are proving popular but equipment imbalances still plague these trades.

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14th September

Registration and coffee commences at 08.15

09.00 **Chairman's opening remarks**
Speaker: David Cheslin, Chairman, Coastlink Network

09.10 **Welcome from the Port of Antwerp**
Speaker: Marc Van Peel, Chairman, Port of Antwerp

Session One

No port can be an island

At Coastlink's 2009 Annual Conference some surprise was shown by French ports when intermodal operators criticised the French rail system in general and SNCF in particular. It was very evident that this poor performance was hurting French ports. The Port of Dunkerque, for example, has deep water, under-utilised facilities and plenty of land but attracting deepsea and shortsea shipping lines is proving very difficult when Zeebrugge and Antwerp are just around the corner. Meanwhile Calais seems worried that its traditional trailer business will switch to multimodal as supply chains adapt to transport UK import cargoes from points of origin much further from the Channel ports. Many argue that if this happens, shortsea container services and Benelux ports will be the main beneficiaries.

Chairman: David Cheslin, Chairman, Coastlink Network

09.30 **Creating a bigger hinterland**
With so much competition on its doorstep, the Port of Antwerp has to work hard to maintain its status as one of the largest ports in Northern Europe. For many years, much of its import and export traffic has been generated locally but the port authority is also investing heavily in expanding its hinterland deep into Europe through the provision of intermodal rail terminals. Greater encouragement is also being given to barge operators.
Speakers: Ira Dierckx, Consultant Strategy & Development, and Helen De Wachter, Senior Consultant, Strategy & Development, Port of Antwerp

10.00 **Inland waterways still an under-utilised asset**
Inland waterways are able to transport containers to and from Central Europe in an environmentally-friendly and cost-efficient manner but they are still perceived by many to be slow and inefficient. A leading barge operator explains how when properly integrated into the supply chain, the use of barges can offer enormous benefits.
Speaker: Hans Buytendijk, Managing Director, Alcotrans Container Line, Zwijndrecht

10.20 **Antwerp expands its intermodal capabilities**
Inter Ferry Boats (IFB) provides integrated transport solutions by rail, barge and truck, supported by terminal operations, Customs handling, ICT services, 24 hours monitoring and other value added services. It has played a key role in expanding the Port of Antwerp's hinterland to include destinations in France, Spain, Italy, Hungary and Romania.
Speaker: Johan Gemels, General Manager Terminals, IFB Terminals, Antwerp

10.40 **Q&A**

11.00 *Coffee Break*

Session Two

The changing face of feeder networks

Chairman: David Cheslin, Chairman, Coastlink Network

11.20 **How optimistic are shortsea and feeder operators?**

Feeder and shortsea container operators see green shoots but is new growth going to be sustained longer term? Belgium's Delphis Group is involved in the ownership of shortsea container vessels and through subsidiaries, maintains feeder and European door-to-door container services. It also operates a shortsea container terminal in Oslo. It would be hard to think of any company better placed to have a view on the overall shortsea market.

Speaker: Alexander Saverys, Managing Director, The Delphis Group

11.40 **Ports fight for shortsea and feeder traffic**

Competition between North European ports for feeder traffic is fierce. For example, when global container volumes fell, Rotterdam took significant container volumes away from Hamburg but the North German port has since won much of it back. What are the dynamics that drive such changes?

Feeder operators would like to be treated better by the larger ports but are generally regarded as subcontractors to the deepsea carriers, not customers in their own right. What can be done to improve this situation?

Maersk is now sending post-Panamax ships into the Baltic Sea. Is this likely to become a trend or is it just a temporary phenomenon?
Speaker: Volker Werner, Director Sales & Marketing, HHLA Container Terminals GmbH

12.00 **Ports in the New Normal – from terminal handling only to focusing on the entire supply chain**

APMT Zeebrugge is the leading deepsea container terminal in Zeebrugge, with a proven track-record of high productivity, high reliability and flexibility!

The company will talk about how it is dealing with the New Normal – the current reality that we think is here to stay: overcapacity in handling capacity and increased competition between ports across North West Europe. Firstly, it will make the case for a much-strengthened cooperation across ports in the Flanders area. Then it will stress the need for differentiation and how APMT puts this in practice. Lastly, we ask ourselves: do we think "supply chain" or terminal handling costs only?

Speaker: Paul Jacob Bins, Managing Director, APM Terminals Zeebrugge NV

12.20 **Q&A**

13.00 *Lunch*

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Session Three

Collaboration

Collaboration is an important subject for Coastlink. For intermodal systems to compete with road transport solutions, you need much greater volumes to come together to justify regular train or barge services and even more volume again to justify new coastal shipping services where ship sizes are now typically 500-1,000TEU. Bringing shippers, ports and carriers together to form working partnerships is essential.

Chairman: David Cheslin, Chairman, Coastlink Network

14.30 Shortsea as part of the transport chain: a practical collaboration

Shortsea shipping is a key element within the co-modal chain. Collaboration between modes clearly requires planning and expertise but most of all, it requires a firm commitment towards working together. Old habits die hard and reluctance to cross demarcation lines is a prime example.

So much is changing. Nodal points are increasing, maritime ports are cooperating with and even investing in inland terminals while trucking companies are nowadays seen as intermodal providers and not the enemy.

Future collaboration will focus on bundling cargo flows and better occupation of available transport space - 30% of modes' capacity is empty - is being encouraged, driven in part by environmental concerns. Shippers must accept that attitudes like "my cargo cannot be in same container/truck as my competitor" are no longer sustainable.

Speaker: Willy De Decker, Shortsea Promotion Centre, Belgium

14.50 Trailers and containers in the intermodal mix

The Colruyt Group is a leading company in the Belgian retail market. It is comprised of several supermarket chains: Colruyt (discounter), Okay (smaller convenience stores), Dreamland (toys and leisure), Bioplanet (organic and fair trade products), Spar Retail (franchises). In addition, it has its own gas stations: Dats 24, and E-shop: www.Collishop.be

The company is also active in France as a retailer and in foodservices (B2B) and has its own offshore IT company in Hyderabad, India. It operates its own home delivery services and an export service that delivers by road, container and airfreight. Colruyt has approximately 22, 600 employees and revenue in 2009/10 was in excess of 6,750 million euros.

Colruyt is taking a strong environmental line with its transport activities and to this effect is now using shortsea services from Portugal (45ft pw containers) and from Bilbao (trailers). From Italy, it is moving trailers on rail. The company will discuss progress so far.

Speaker: Yoeri De Frenne, Project Manager, intermodal transport, Colruyt NV, Belgium

15.10 Q & A

15.30 Coffee Break

16.00

New tools for the multimodalist

In the shortsea trades, there is a wide range of container types available to shippers and multimodal operators. There are 45ft dry boxes, electric and diesel-electric reefers, curtain sides and flatracks. There are 30ft bulk containers and tanks. Recent innovations include 45ft reefer units for plants and flowers that are 3.08m high and prototypes under test include a 'gull-wing' 45 footer that offers solid sides and full length access on both sides. What else is in the pipeline and what would the market like to see?

Speaker: Jan Koolen, Managing Director, UNIT45

16.20

Q & A

16.30

*End of Day One of the conference
Evening Dinner (incorporating Port Tour)*

17.00

Guests leave Port of Antwerp Building to walk to mv Festina Lente, moored in Willem Dock

17.15

Departure from Willem Dock berth

17.30

*London bridge opens
Port tour to include Delwaide dock (MSC terminal)*

20.15

London bridge opens

20.30

Willem Dock arrival – end of the tour

15th September

8.30

Coffee

Session Four

Multimodal fights back

The movement of goods by sea between Iberia and Northern Europe survived the transition from breakbulk to containers but was less successful fighting off competition from road transport operators. Now though, shortsea shipping is experiencing something of a revival.

Rail is experiencing something of a revival too.

From Southern and Eastern Europe to Northern Europe, for example, cheap road transport captured much of this fast growing trade but road costs are no longer cheap and cross-border rail transportation is becoming more efficient. This is working to the advantage of shortsea shipping as more and more containers are delivered into Benelux ports for on-carriage to the UK, Ireland, Scandinavia and the Baltic.

Chairman: David Cheslin, Chairman, Coastlink Network

09.20

Overview of the shortsea shipping Industry in Portugal

Shortsea is a strong and valid proposition for shippers wanting to move goods to or from Iberia to other parts of the Continent. However, the sky is not always painted blue and fierce competition from hauliers exists. The speaker will describe the main trades, trends, the principal players and the road competition. The importance of reefer containers and the problems associated with equipment imbalances are also on his agenda.

Speaker: Ricardo Vilares Morgado, General Manager, Navex-Empresa de Navegação SA

09.40

Rail operators push eastward

Established in 1967, Hupac is the leading intermodal transport operator through the Swiss Alps and one of the market leaders in Europe. It operates a network of more than 110 trains each day between Europe's main economic areas and between ports and their hinterlands. The company works to ensure that an increasing volume of goods can be transported by rail and not by road, thus contributing to modal shift and environment protection.

In recent years, while still seeing growth in its traditional markets, Hupac has been pushing eastward to accommodate the need for good intermodal links connecting North Europe's major ports with countries such as Hungary, the Czech Republic, Slovakia and Romania.

Speaker: Alberto Grisone, Business Manager, Project Development and Strategy, Hupac Intermodal SA

10.00

Q&A.

10.20

Break

Session Five

The UK market: Interesting concepts begin to prove themselves

Chairman: David Cheslin, Chairman, Coastlink Network

10.30

Tesco and ASDA on the Tees: The Portcentric dream is realised but PD Ports now moves to Stage Two

The decline in the local chemical and petro-chemical industries, once only second to Rotterdam, had a disastrous effect on Teesport's container throughput, especially the trades with Northern Europe. It also left the port with a great deal of land available. The management's response was to market the port as a distribution centre and a number of big names were suitably impressed. ASDA (Wal-Mart) and Tesco are just two major importers who now tell lines that they must deliver their import containers into Teesport where they have built massive distribution hubs. This in turn has attracted a number of shortsea and feeder services, bringing closer the day that it attracts its first deepsea services.

PD Ports is now moving to Stage Two with a concept that will enable smaller companies to also benefit from the Portcentric concept.

Speaker: Helene Ljall, Sales & Marketing Manager, PD Ports

10.50

The Manchester Ship Canal returns to life

In its heyday, the 60km long Manchester Ship Canal enabled the Port of Manchester to be a thriving deepsea port and cargo liners arrived from all over the world. With the advent of containerisation, the port even built container gantry cranes to enable its biggest customer, Manchester Liners (ML), to use modern cellular ships on its long-established Canadian service. However the writing was on the wall and when ML ordered two 800TEU vessels in the mid 1970s, the end of the Port of Manchester seemed inevitable. Too big for the locks, these ships had to use Liverpool when delivered in 1977.

However the city of Manchester and the surrounding area continues to thrive and demand for greener logistics links has prompted the current owners, Peel Ports, to revive the port and the canal banks, developing trimodal capabilities.

Speaker: Dean Hammond, General Manager Manchester Ship Canal – Peel Ports

11.10

Q&A

11.30

Coffee

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Session Six

The importance of education

Chairman: Gavin W Roser, Deputy Chairman, Coastlink Network

11.50 Sustaining competitiveness in Europe through maritime education and life long learning

Two EU projects KnowME and the Northern Maritime University {NMFU} are critical in this field. NMFU modules organised through universities in Norway, Sweden, Denmark, Germany and the UK dealing with practical industrial issues relevant to executives in the ports and shipping sector.

Speaker: Gordon Wilmsmeier, NMFU project leader & Senior Research Fellow at Transport Research Institute - Edinburgh Napier University

12.10 Taking training seriously: the Beluga approach

Beluga Shipping is the worldwide leader in the project and heavy-lift sector, a highly-specialised branch of the shipping industry where the skills and expertise of the workforce, both on board ship and in the office, are critical factors in the safe transport of highly valuable items of cargo.

To ensure that its standards are maintained, Beluga has established relationships with various centres of excellence in maritime education and training. The company will present an overview of its initiatives and its cooperation with universities, colleges of applied sciences, grammar schools and professional educational institutions. Its intention is to ensure that not only does it have highly skilled personnel now but that there will be a steady supply of well-trained young recruits able to take the company forward in the future.

Speaker: Verena Beckhusen, Director Public Relations & Business Communications, Beluga Shipping, GmbH

12.30 Q&A

13.00 Lunch

Session Seven

14.15 Thoughts on the past two days

Speaker: Gavin W Roser, Deputy Chairman, Coastlink Network

15.30 Conference ends

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