



# Session 1: The Waves of Container Terminal Concessions in the Mediterranean Region

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# Logistics evolution



**80-'90s**

Globalization and delocalization towards the East and South



**'90s-'00s**

Large distributors and retailers (Ikea, Inditex, Mango, Carrefour, Lidl, H&M...)



**2015-2025**

e-commerce

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# What container customers request from Port & Terminals. Best practice 1: shipper



**Saturday 08:00**  
 Container ship arrives at the Port of Barcelona. Containers are unloaded and transferred to the train (Sunday 01:00)

**Sunday 06:00**  
 Cargo train leaves the Port destination Madrid

**Sunday 16:00**  
 Cargo train arrives to Azuqueca intermodal terminal (Guadalajara, Madrid)

**18:00**  
 Trucks pick up containers and transport them from the terminal to the nearby distribution centre in Madrid

**Monday 10:00**  
 From the distribution center the pieces of clothing are shipped throughout the world



Updated March 2019

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# What container customers request from Port & Terminals. Best practice 2: shipping line

## Container terminal productivity

- **Barcelona, 3rd European port in productivity** behind the Port of Bremerhaven (Germany) & Rotterdam (Netherlands). Awards "Top Ports & Top Terminals in Europe" by "Journal of Commerce" (nov. 2014)
- **TCB & BEST are among the Top 10 in Europe for productivity index.**
  - **TCB: 80 movements / boat / hour**
  - **BEST: 76 movements / boat / hour**
- "Catch up" Recovery delays in ships
- Berthing windows vs. flexibility

MARÍTIMO • TCB y BEST se sitúan entre las diez primeras terminales de Europa en índice de productividad

### Barcelona recibe un reconocimiento por ser el tercer puerto más productivo de Europa

Barcelona recibió la semana pasada un reconocimiento por haberse convertido en el tercer puerto europeo más productivo. El galardón, que el puerto catalán compartió con Algeciras, fue recogido por el subdirector general de Estrategia y Comercial del enclave, Santiago García Billa, en el marco de la JOC Europe Port Performance Conference.

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Se trata de la primera vez que un puerto del sur de Europa se sitúa entre los tres primeros de Europa en productividad. Destaca la APB, situada en el delta de Bremerhaven (Alemania) y Rotterdam (Países Bajos), que se sitúa en primer lugar en el índice de productividad.

Este premio "es un reconocimiento explícito al esfuerzo realizado por todos los implicados -navieras, terminales, autoridades, autoridad portuaria- para mejorar la capacidad de respuesta y la rapidez con la que se atiende la buques portuarios europeos" y destaca especialmente las mejoras realizadas por BEST y TCB en materia y en términos de los procesos terminales para mejorar su productividad, concluye la APB.

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## What container customers request. Best practice 3: logistics operator

# BCN Port Booking System



**BCN Port Booking System es el sistema de reserva previa o asignación de ventanas de tiempo específicas para la entrega o recogida de contenedores en las Terminales APM TERMINALS y BEST**

↓ CÓMO FUNCIONA

📄 PROCEDIMIENTO PORT DE BARCELONA

🌐 ACCESO APLICACIÓN



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## Future trends in Container traffic demand

### ↓ Limits of globalization?

*2016 World trade of merchandises: +1.3%. 1st time since 2001 lower increase than World GDP (WTO)*

### ↓ New protectionism (in the West only?) and limits of further liberalization?

### ↑ More intra-regional trade / less international trade?

### ↑ Africa growth (and India). Towards a 3 billion population continent?

### ↑ Re-shoring (less than expected, labor costs are not so important any more) ?

### ↑ Automotive industry increase worldwide / decline in Europe ?

*Production by region: 1970 →2018 / Europe 45M →25 M / Asia Pacific 20 M→55 M*

### ↓ Relocation, 3D printing, miniaturization, dematerialization ?

### ↓ The future axes of world maritime transport: Intra Asia and Far East – Africa ?

### ↓ Further containerization? 2016 stabilization of the containerization ratio: 13% ?

### ↓ New transport routes. BRI (rail), Arctic and Good Hope Cape Route (maritime) ?



## The container shipping industry

- Ship gigantism, until when?

2020	2040
23,000 TEU	?

- Industry structure: concentration on large players?  
Few and big players
- Will technology companies replace traditional operators?
- Automation and robotics, massive jobs destruction?
- Transshipment vs direct services by flexible operators
- Alternatives means of transportation

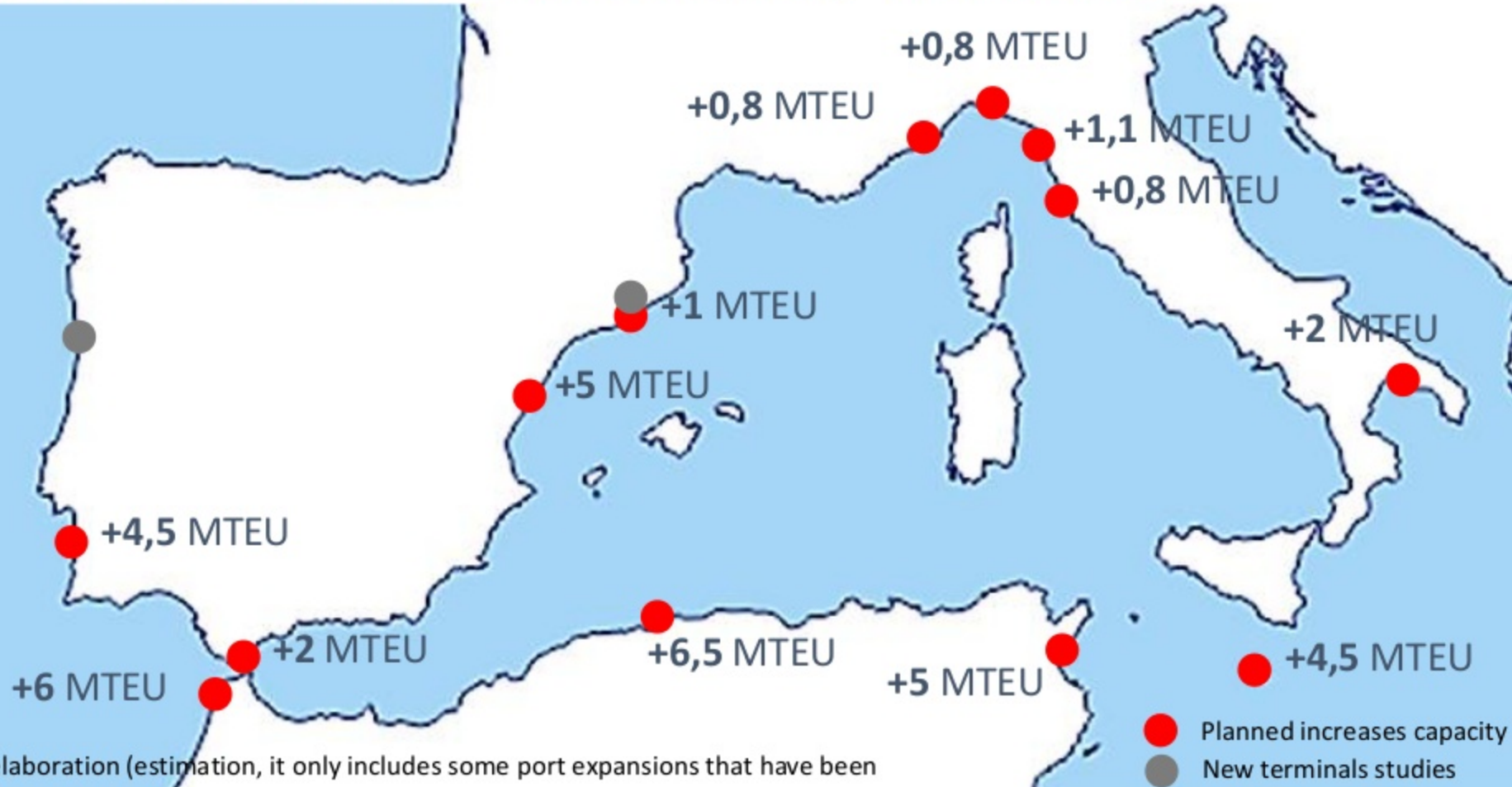
*"Doubling the maximum container ship over the last decade has reduced total vessel costs per transported container by roughly a third. However, these cost savings are decreasing with size; the cost savings of the newest generation of containerships are 4 to 6 times smaller than the savings from the previous round of upsizing. Approximately 60% of the cost savings of the most recent container ships are related to more efficient engines and not to scale".*

**The impact of Megaships -  
OECD**

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## Expected growth in container capacity in West Med



● Planned increases capacity  
● New terminals studies

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Source: own elaboration (estimation, it only includes some port expansions that have been announced)





## The Port's mission

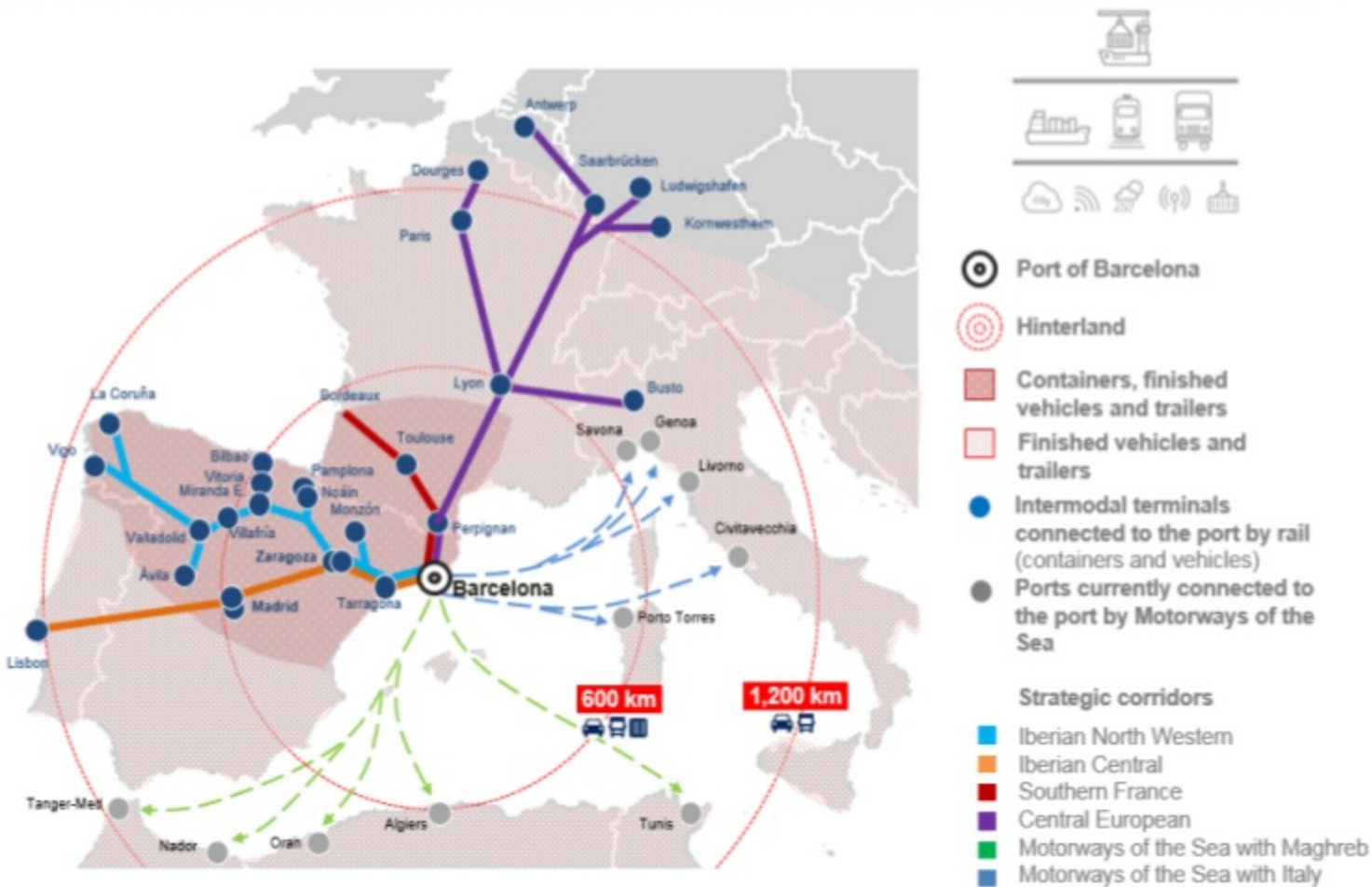
**“ To contribute to the competitiveness of the customers of the Port by providing efficient services responding to their needs for maritime transport, land transport and logistics services ”**

- 1. Competitiveness of shippers, industries, logistics operators & shipping lines.**
- 2. Attraction of new industries & distribution centers.**





# Port de Barcelona's Customers location & Hinterland



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## Leading international brands have their distribution centers in

National	<b>BCN</b>	<b>IKEA</b>	<b>Carrefour</b>		<b>LIDL</b>	
		Ikea located its Southern European logistics centre in Valls (Tarragona).	In ZAL Barcelona they have 2 logistics warehouses: a dry one of 44.000 m2 and a cold one of 17.000 m2.		Logistics platform for the Iberian Peninsula in Moncada i Reixac (Barcelona) and a warehouse of 36.000 m2 in ZAL Barcelona.	
Regional	<b>AMAZON</b>	<b>Schneider Electric</b>	<b>HONDA Logistics</b>	<b>MAZDA</b>	<b>Decathlon</b>	<b>KIABI</b>
	Amazon has a new logistics center of 63.000 m2 in El Prat de Llobregat (Barcelona). The center is a part of its European network.	Schneider Electric has an integrated logistics centre in Sant Boi del Llobregat (greater area of Barcelona).	Factory & logistics center in Santa Perpetua de la Mogoda (Barcelona) for distributing Spain & Portugal & Morocco	Car imports from Japan through the Port of Barcelona to be distributed to other Mediterranean countries.	In ZAL Barcelona they have their logistics center of 50.000 m2 for stock management & for sport materials delivery to their warehouses and shops in Europe.	New logistics center of 53.000 m2 in La Bisbal del Penedés for distributing their products in Spain, Portugal, Italy and south of France.
Worldwide	<b>INDITEX</b>	<b>SEAT</b>	<b>Nissan</b>	<b>MANGO</b>		
	From its logistics center in Tordera (Barcelona) distributes some of its brands worldwide and from ZAL Barcelona only its shops in Barcelona .	Their factories are in Barcelona from where they distribute their cars by road, rail and sea, all over the world.		New logistics centre in Barcelona with 70.000 m2 of warehouses handling most of the company's international flows. "The proximity to the port was a decisive factor in choosing the location of our new logistics park".		

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# Industrial concentration in the Barcelona Metropolitan Area



- Plastics, polymers
- Robotics, Advanced metal manufacturing, energy systems, nuclear research
- Pharma, surgical and medical device manufacturing
- Automotive manufacturing, EV, self driving cars
- Industrial gas manufacturing, chemical products
- Food & packaging, gastronomy & chemicals

City	Sectors
Castellbisbal	Advanced metal manufacturing, robotics
Cerdanyola	Energy systems, nuclear research, robotics
Cornellà	Industrial gas manufacturing, chemical products
El Prat de Llobregat	Polymers, paint, chemical manufacturing
Esplugues	Food & packaging, gastronomy & chemicals
L'Hospitalet	Pharma, industrial machinery
Martorell	Automobile manufacturing, electric vehicle, self driving cars
Palau Solità	Plastics, polymers
Sant Cugat	Pharma, surgical and medical device manufacturing
Santa Perpetua	Plastics, polymers
Rubí	Pharma, surgical and medical device manufacturing

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## Traffic facts & figures

Port traffic figures 2018

<b>Total traffic</b>	<b>67.7 M tons</b>	<b>+10.2%</b>
<b>Containers</b>	<b>3.42 M TEU</b>	<b>+15.13%</b>
<i>Hinterland</i>	<i>1.97 M TEU</i>	<i>+4.0%</i>
<i>Transshipment</i>	<i>1.44 M TEU</i>	<i>+34.9%</i>
<b>Cars</b>	<b>810,218 cars</b>	<b>-3.3%</b>
<b>Ro-Ro</b>	<b>408,553 UTI</b>	<b>+3.5%</b>
<b>Cruises</b>	<b>3.0 M pax</b>	<b>+12.1%</b>

Gateway port

1st in the MED. 4th in Europe

1st in Spain in medium & long distance

1st in Europe and in the Mediterranean & 4<sup>th</sup> in the World

And relevant hub for hydrocarbon products

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Port rail market share 2018

<b>Containers</b>	<b>13.3 %</b>	<b>262,379 (+7.7%)</b>
<b>Cars</b>	<b>36.2 %</b>	<b>263,953 (+10.7%)</b>

**Spain's leading port:**

- turnover
- goods value
- hinterland traffic



# Container traffic and container terminals at the Port of Barcelona

Port of Barcelona traffic MTEU

2015	2016	2017	2018
<b>1.97 (+4)</b>	<b>2.24 (+14%)</b>	<b>3 (+32%)</b>	<b>3.42 (+15%)</b>

HUTCHISON PORTS BEST	
Capacity	2,25 M TEU
Area	79 ha
Berthing line	1.300 ml
Draight	16 – 16,5 m
Quay cranes	11
Blocks	21
ASC	42
Shuttle Carriers	26
Reach Stackers	6
Reefer plugs	1.350

**BEST Railway terminal**  
 8 Rail tracks (750mts each)  
 Total rail tracks of 21Km  
 (Mixed gauge UIC-Iberian)  
 2 RMG

APM TERMINALS BARCELONA	
Capacity	2,3 M TEU
Area	80,4 ha
Berthing line	1.515 ml
Draight	16 m
Quay cranes	13
Reach Stacker	2
Fork lifts	10
Straddle carrier	72
Reefer plugs	525

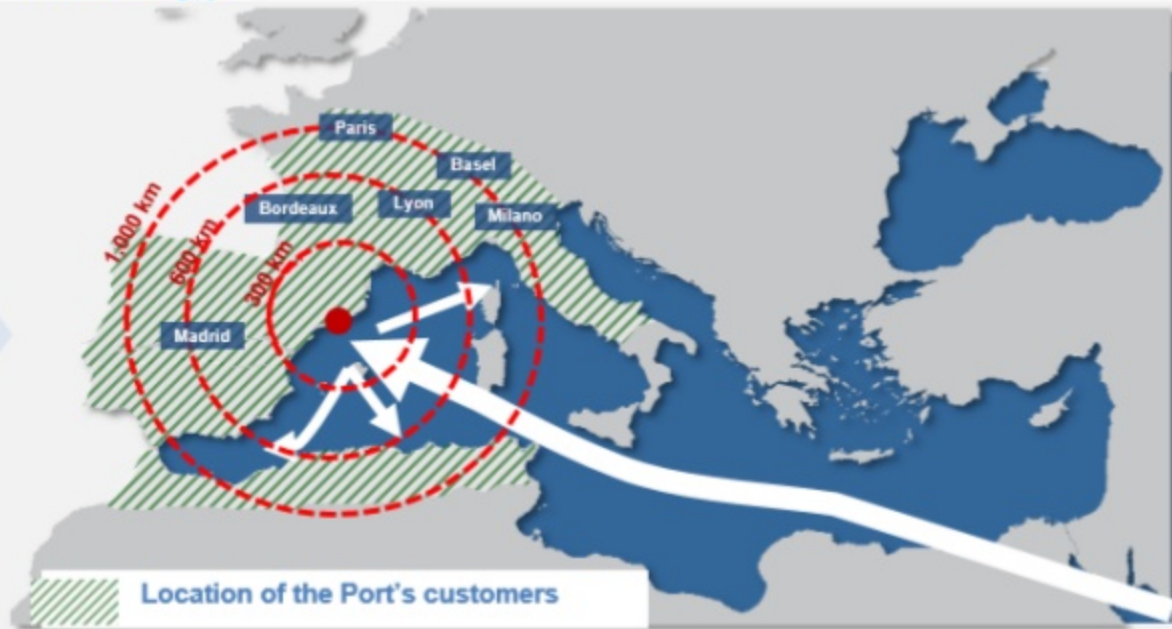
**APM Railway terminal**  
 6 Rail tracks (750mts each)  
 (Mixed gauge UIC-Iberian)  
 2 RMG

Port de Barcelona  
 Image Suite 01  
 de 08 de novembre del 2017



# Port of Barcelona strategy

European & Mediterranean logistics hub in order to serve our clients located in Spain, France, Italy, Portugal and North Africa



**i) Expansion of the Port and Logistics areas**

**Largest part completed**

New investments: Hutchison & Carnival, Grimaldi, Salamanca group...

+

**ii) Improved connectivity with hinterland and foreland**

**Hinterland strategy**

Direct services with Far East with excellent transit time

+

**iii) Efficiency in the provision of services**

**Port services**

3rd most productive port in Europe JOC's Port Productivity Report 2014

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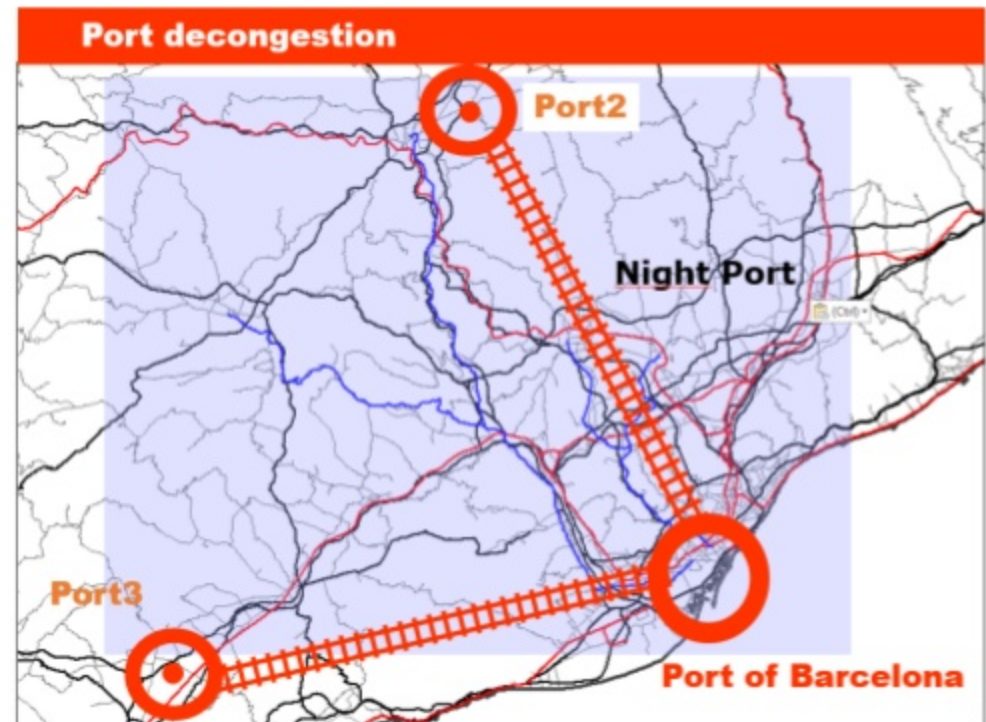
# Port network: decentralisation of the Port

## Intermodal rail services

### Containers



## Port 2 / Night port



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