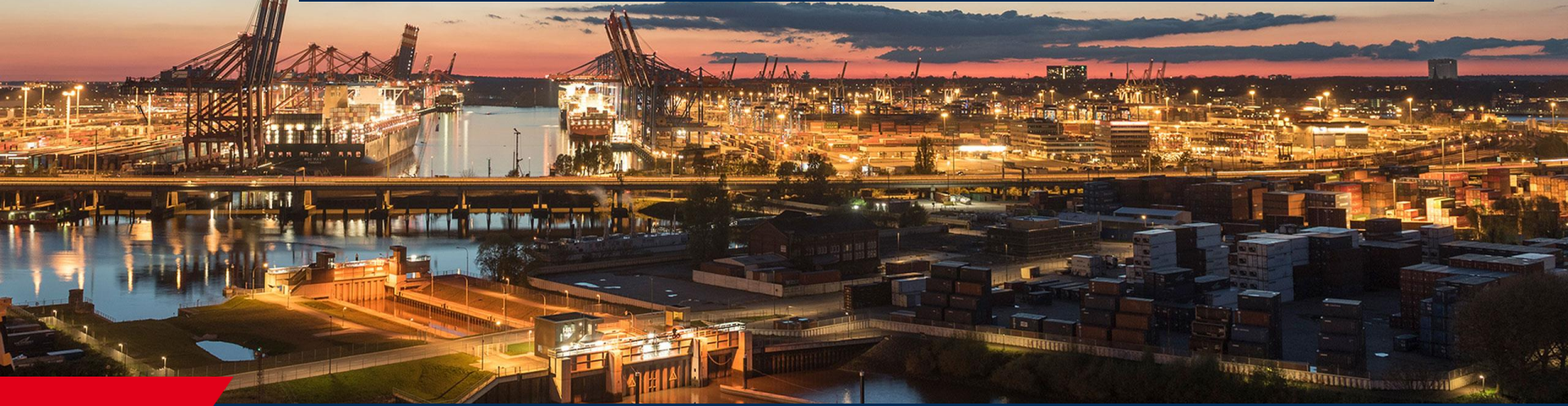


# Port Authority Roundtable Discussion

## Global Trends from a Port Management Perspective



**Dialogue of Continents Conference | Paris, France | September, 4th 2018**

Iris Scheel, Member of Management Board, Hamburg Port Authority

# The Port of Hamburg



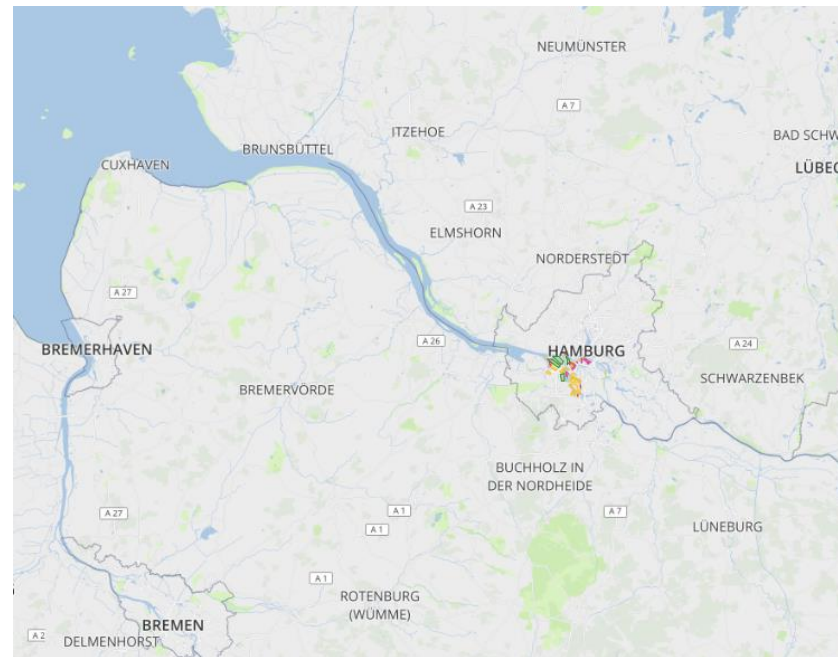
City port with access to 5.3 Mio. people and a distance to the North Sea of about 120 km



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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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

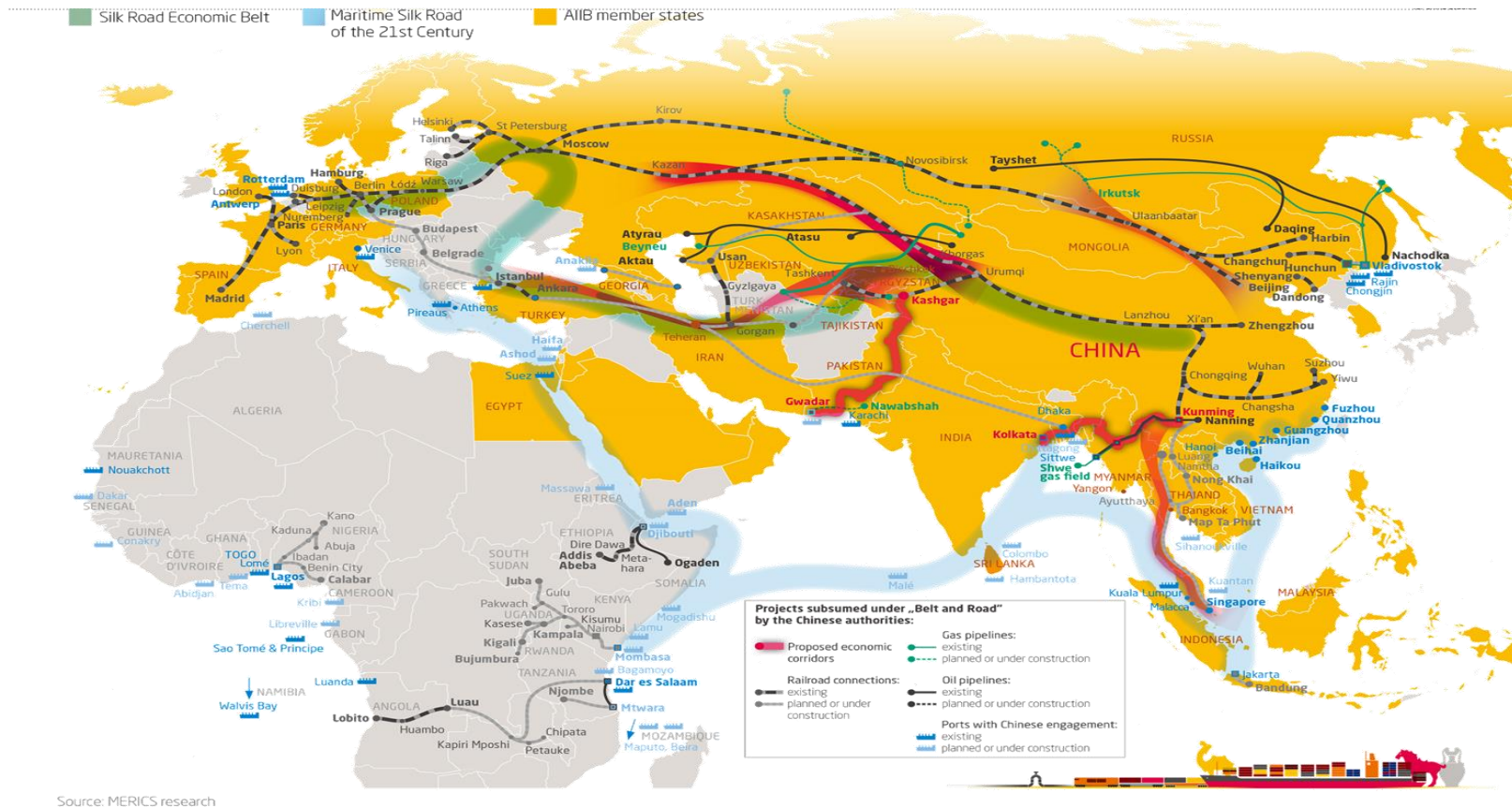
Future oriented infrastructure  
investment in the light of growing  
vessel sizes.



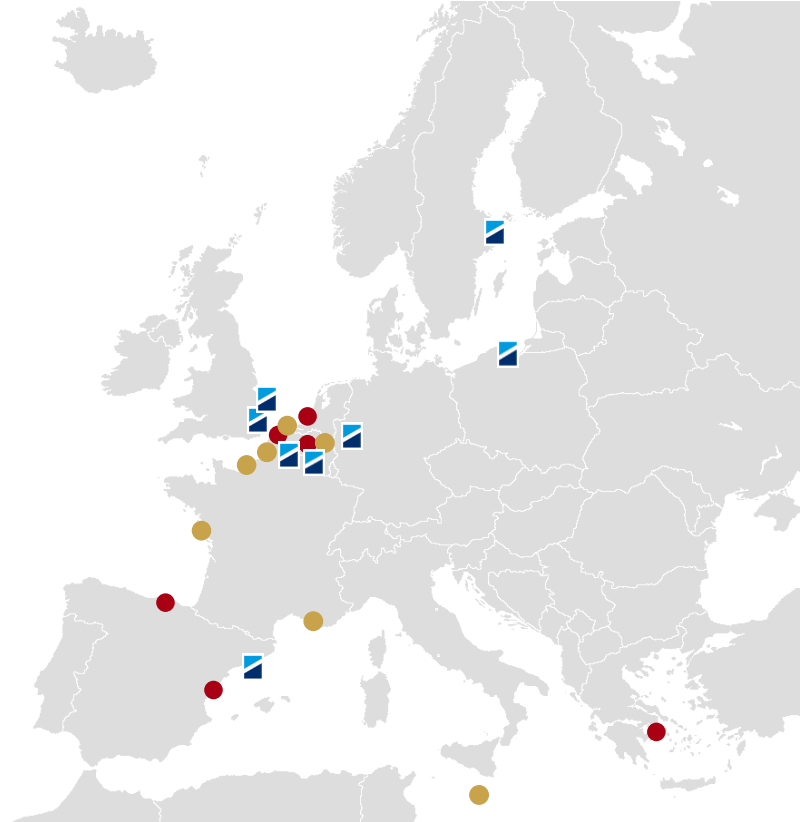
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# China's aim to build a global infrastructure network.

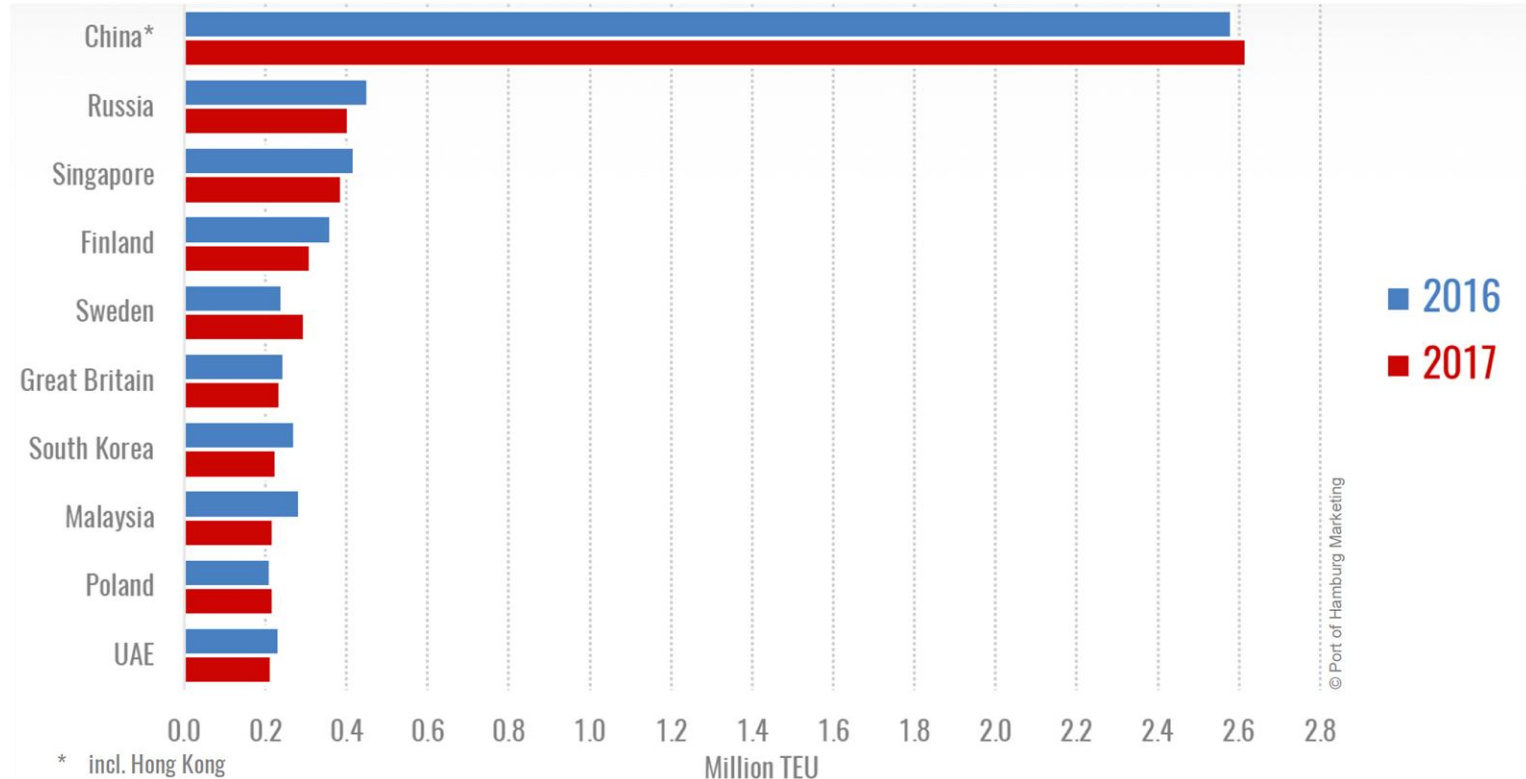


China's OBOR policy and its implications: 15% to 20% of all European port assets have a Chinese majority.



# 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.





# Chinese OBOR-investments in Hamburg? – Ideas contest Steinwerder Sued

## 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**

Global trends that affect Port Authorities are manifold.

1



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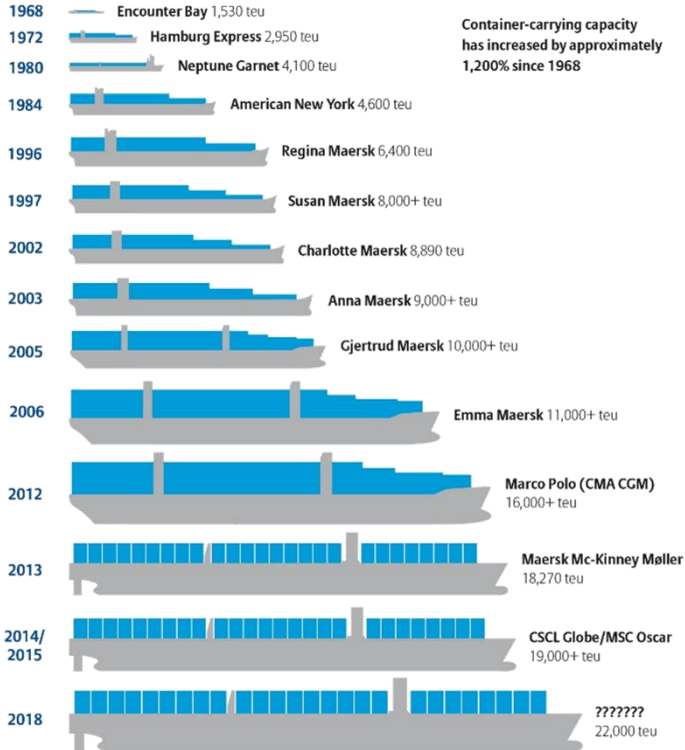
## SUPER SIZE ME

Future oriented infrastructure  
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2

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



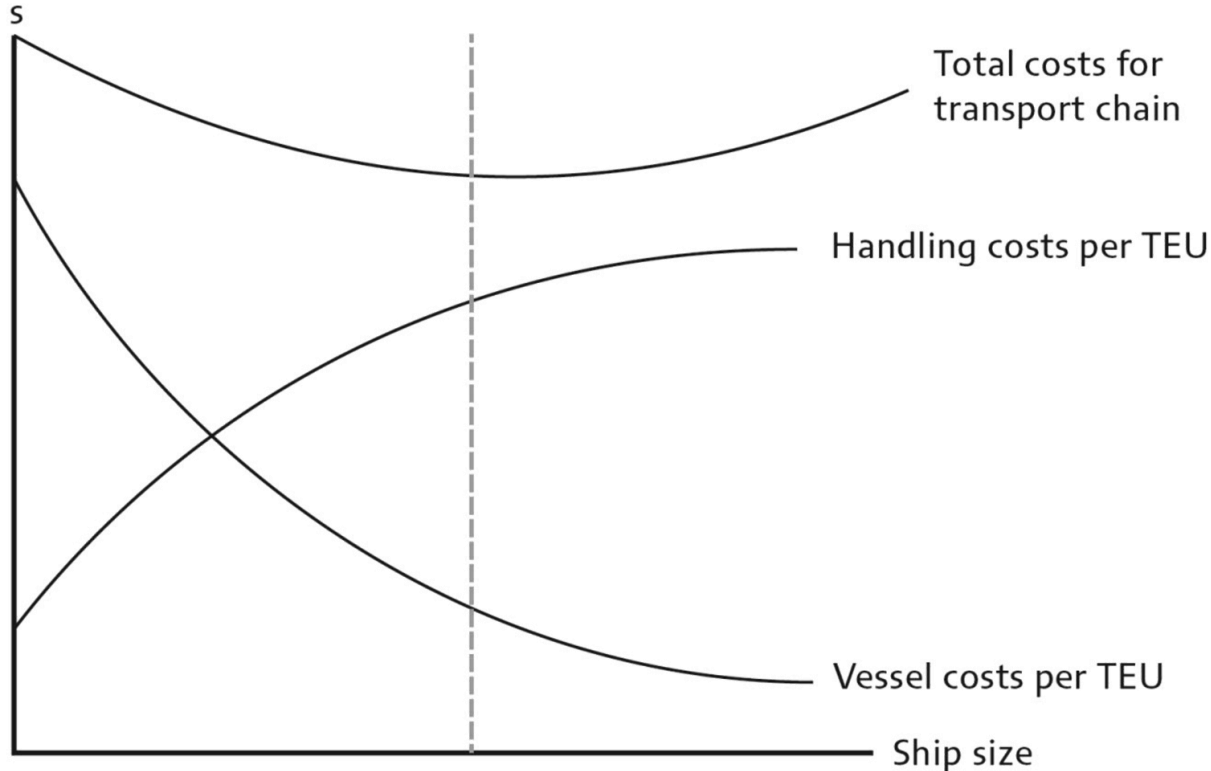
## Ever-growing vessel sizes implies challenges with regard to

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

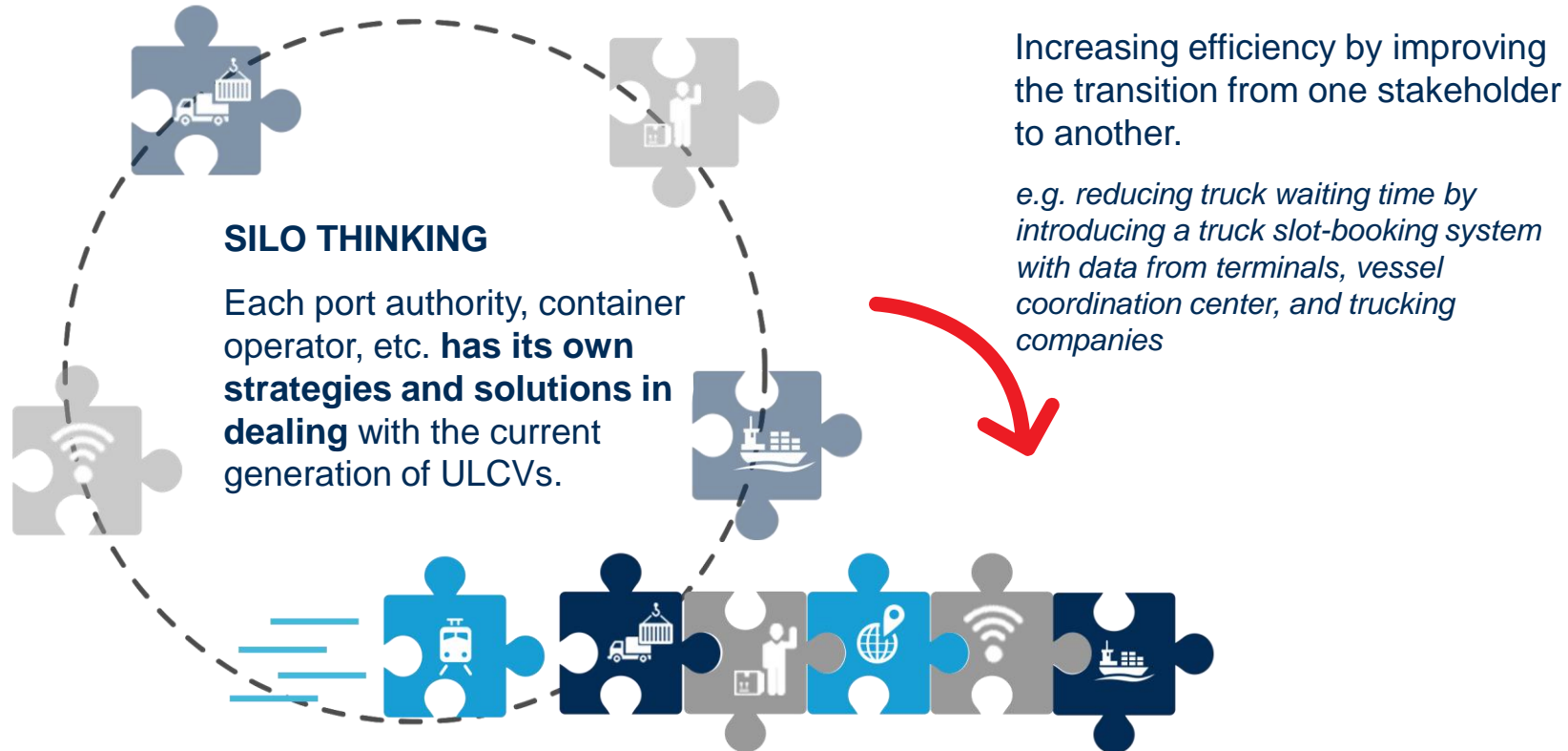
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Barges

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.



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





Thank you for your kind attention!



**Iris Scheel**

Member of Management Board  
Head of Corporate Functions

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