



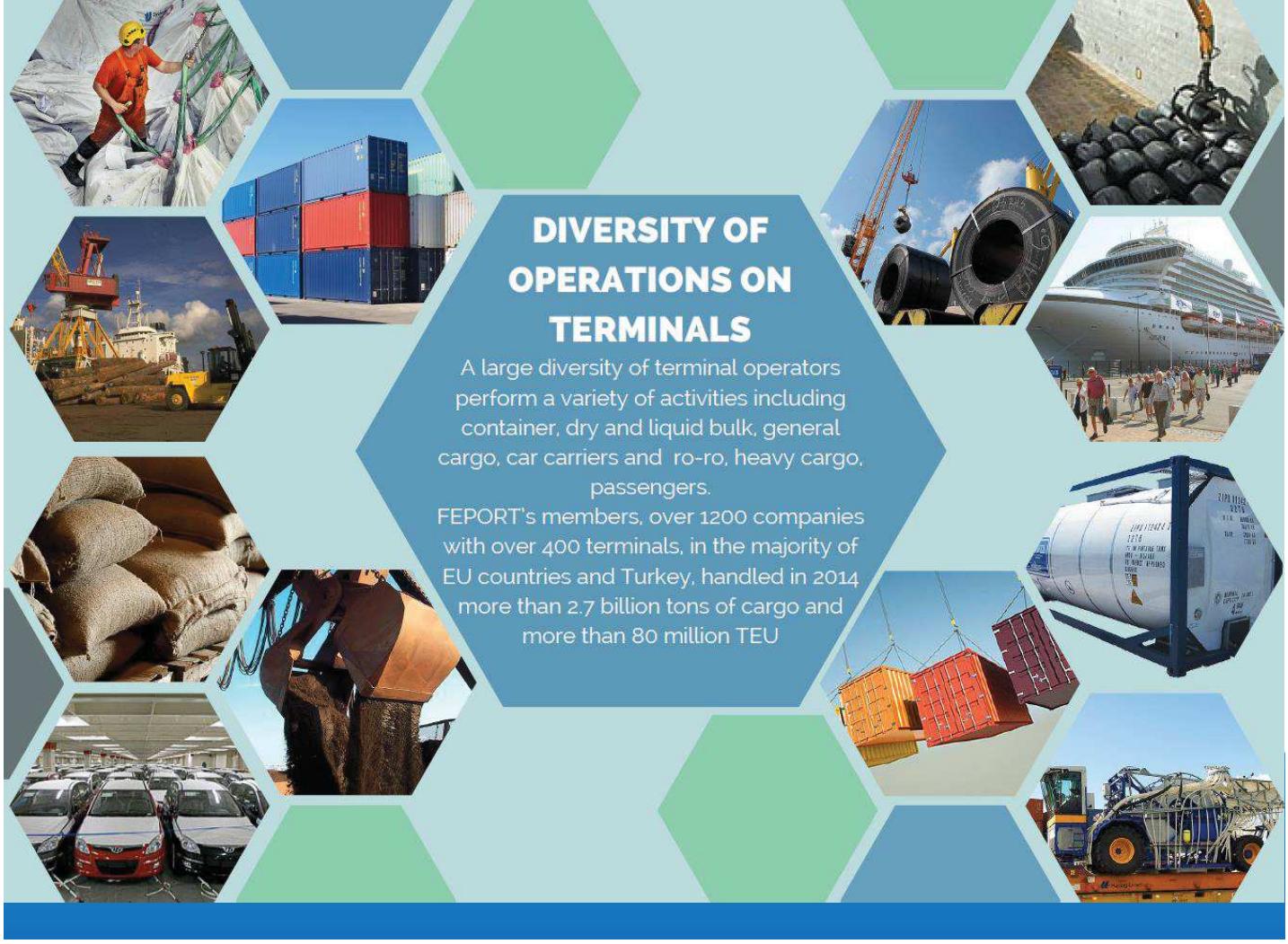
FREIGHT FORWARDERS FORUM 2015

Antwerp, November 19th, 2015

Speaker : Lamia Kerdjoudj-Belkaid, Secretary General of FEPOR

FEPOR membership consists of large multinational terminal operating companies and national associations from the individual European Union member states.

The organization's aim is to promote the interests of our members and to maintain constant dialogue with all EU institutional and non-institutional stakeholders.



DIVERSITY OF OPERATIONS ON TERMINALS

A large diversity of terminal operators perform a variety of activities including container, dry and liquid bulk, general cargo, car carriers and ro-ro, heavy cargo, passengers.

FEPORt's members, over 1200 companies with over 400 terminals, in the majority of EU countries and Turkey, handled in 2014 more than 2.7 billion tons of cargo and more than 80 million TEU



The Private Terminal operators' perspective

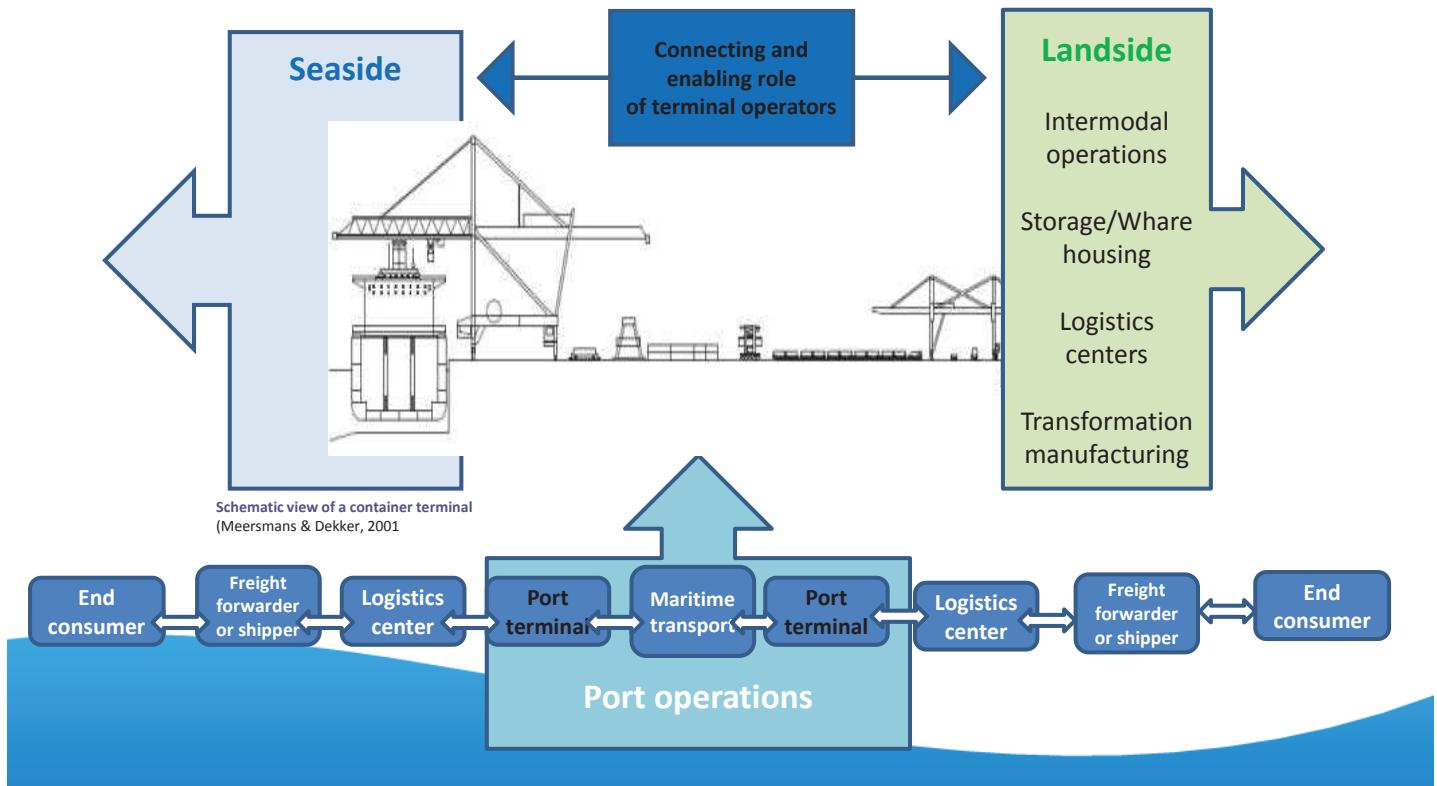
Big Ships = big challenges for the supply chain

Few questions...

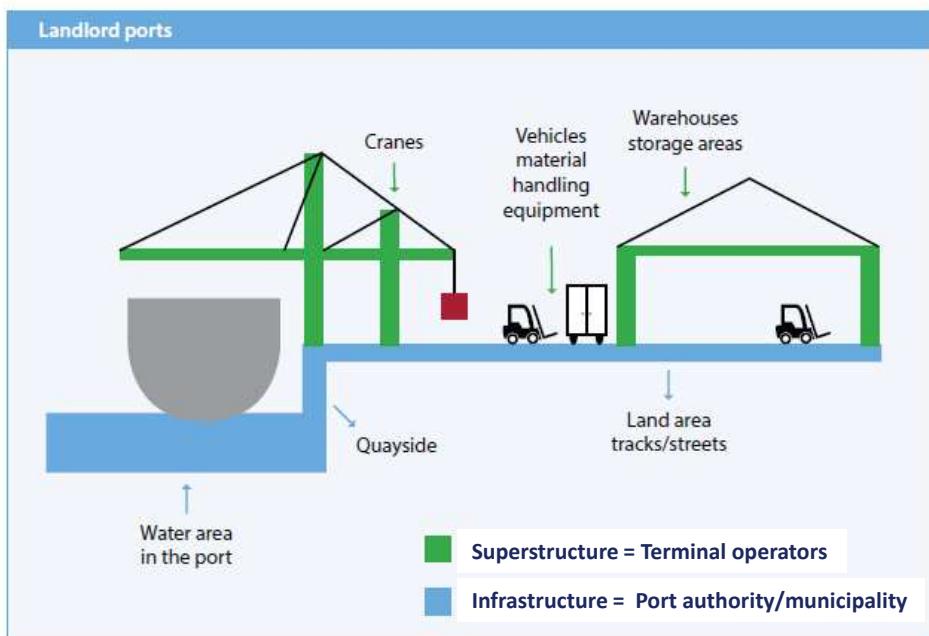
- Are port terminals already acting to respond to the current and future challenges ?
- Are terminals in big ports the only ones concerned by the impact of big ships ?
- Does investment constitute the sole response to the challenges resulting from the increase of big ships ?



Interdependence of the actors of the maritime logistics chain



Terminal Operators are constantly investing



Private or industrial companies rent the infrastructure and invest in own superstructure including buildings (offices, sheds, warehouses, cranes, straddle carriers...etc)



FIGURES

Number of Companies

1200



Contribution to the GDP

68 billion EUR



Investment
(last 10 years)
40 billion EUR
(in equipment and infrastructure)



Indirect jobs
1 050 000*



Number of employees

220 000



Average throughput
80 million TEU
2.7 billion tons**



Figures representing the minimum and are based on information from Members who provided the data
* 1 000 000 tons of throughput creates 300 indirect jobs - OECD Report 2013
** non-containerized cargo

HARBOURS
360



Interdependence of the actors of the maritime logistics chain



“Domino effect”

Port terminal

Innovation, more productivity, Investment, reorganisation (peak and low activity), change management....

Big ships/innovation in maritime transport

Port terminal

Innovation, more productivity, Investment, reorganisation (peak and low activity), change management....

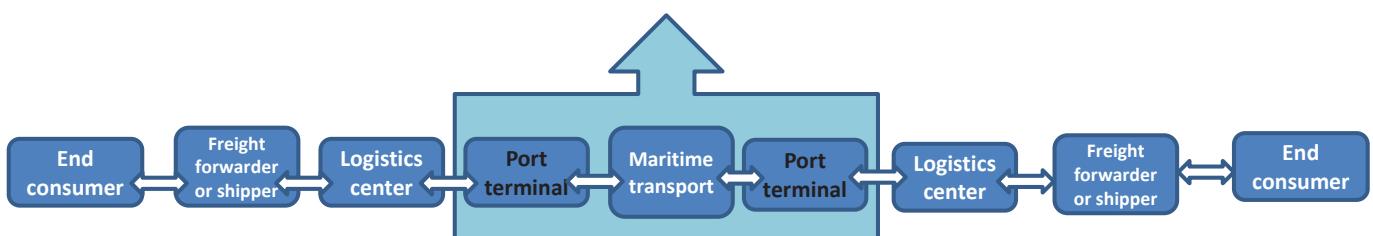


Terminal Operators are investing, adapting and innovating to accommodate big ships



key success factors for an efficient and competitive maritime logistics chain

Time to make of the “Domino effect”, a “win win effect” ?



Time to get rid of the “Prisoner’s dilemma” curse ?



A key success factor for an efficient and competitive maritime logistics chain

"Prisoner's Dilemma"	Cooperate		Defect	
Cooperate	Landside	Seaside	Land side	Seaside
Defect	Landside	Seaside	Landside	Seaside

The solution ?

Time to get rid of the "Prisoner's dilemma" curse ?

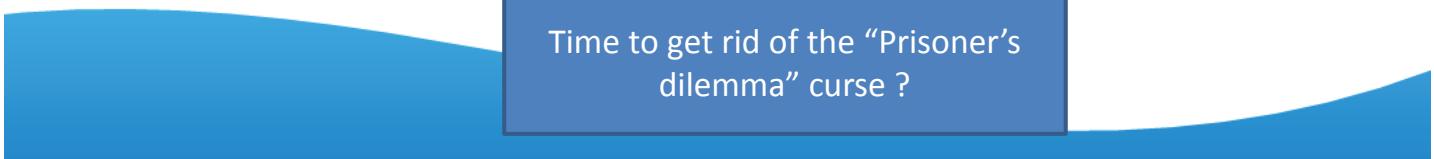


A key success factor for an efficient and competitive maritime logistics chain

"Prisoner's Dilemma"	Cooperate		Defect	
Cooperate	Actors of the maritime logistics and supply chain	Actors of the maritime logistics and supply chain	Actors of the maritime logistics and supply chain	Actors of the maritime logistics and supply chain
Defect	Actors of the maritime logistics and supply chain	Actors of the maritime logistics and supply chain	Actors of the maritime logistics and supply chain	Actors of the maritime logistics and supply chain

The solution ?

Time to get rid of the "Prisoner's dilemma" curse ?





One word regarding the pitfalls to avoid when addressing the issue of Mega ships :

Worst case scenario would be :

- **A reinforcement of the « Prisoner's Dilemma » through fiercer competitive behavior from some actors on the seaside and the landside**
- **Deployment of individual/silo strategies that worsen the situation**
- **Concentration of solutions via few big ports**
- **Investment is not driven by sustainable demand**



Another word regarding cooperation :

And what is going on in the Port of Antwerp....to face the coming challenges ?

Who said that ports are not proactive ?

Good signals to the private sector :

Inclusion of independent members representing industry and the private sector in the governance body of the port of Antwerp as from January 2016

A good practice that should be inspiring more ports....

Next December 3rd, 2015, FEPOR will host in Brussels a stakeholders' conference gathering 16 organizations of the logistics and supply chain.





Thank you for your attention