

## FORECASTED DEVELOPMENT IN TERMINAL CAPACITY (MILLION TEU)



Source: Drewry Global Container Terminal Operators Annual Review and Forecast: Annual Report 2016

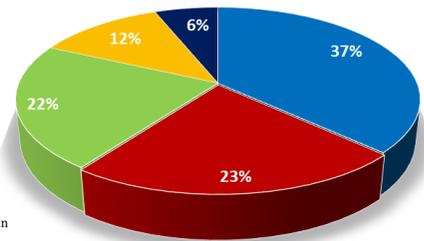
## Top 20 Global Terminal Operators based on throughput represented by FEPORT:

Ranking	Operator	Million TEU	% Growth/Decline
2	Hutchinson Ports	82.3	4.0%
4	PSA International	73.9	9.8%
5	DP World	68.7	10.2%
7	TiL	44.0	16.8%
9	CMA CGM	24.8	49.4%
10	Eurogate	13.8	-1.6%
16	ICTSI	9.2	5.3%
19	HHLA	7.3	7.6%

Source: Drewry Annual Review of Global Container Terminal Operators 2018

## SHARE IN % OF TOTAL CARGO HANDLED IN MAIN PORTS OF EU28

- Liquid bulk goods
- Dry bulk goods
- Containers
- Ro-Ro mobile units
- Other cargo



Source: Eurostat 2018

Total cargo handled in main ports: 3883 million tons

Within the European Union, roughly 91.4% of all above cargo is handled by private companies, FEPORT members handled 3.8 billion tons in 2017.

## FEPORT MEMBERS

### Associations



### Companies



The Federation of European Private Port Operators and Terminals



## Terminals, value creators between land and sea

Founded in 1993, FEPORT represents since 25 years the interests of the majority of private port operators and stevedoring companies in the European Union and Turkey.

Operations are carried out in 425 terminals. FEPORT members handle the main share of the total throughput in the EU. For container handling, the share is 91.4%.

FEPORT membership includes a variety of companies and national associations of private port operators. The aim of the organisation is to promote members' interests and to maintain continuous dialogue with all institutional and non-institutional stakeholders.

## PRIVATE INVESTMENTS IN PORTS

As private port operators commit themselves in capital intensive and long-term binding port investments, they expect from policy makers to create a business-friendly framework with stable rules and foreseeable effects.

Harmonized implementation is also crucial and constitutes the backbone of the certainty that private investors need to commit over the long term.

When planning future investments in the transport sector, Public Authorities should focus on cross-border projects, missing links, and bottlenecks, thus ensuring enhanced connection between ports and the hinterland.

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## ENVIRONMENT & CLIMATE CRISIS

European institutions and national governments have recognised carbon emissions reduction as one of the key challenges that the world needs to tackle. All sectors of society have to engage this challenge and the transport sector is no exception.

The EU has set a target for the reduction of greenhouse gas emission by 20% compared to 1990 figures by 2020, 40% by 2030, and 80-95% by 2050.



Since 2012, container terminal operators which account for over 75% of all containers handled in the EU, have embraced this responsibility by developing a common methodology (EEEG/FEPORT Guidance for Greenhouse Gas Emission Footprint), which elaborates how terminals can calculate their emissions over a set period of time.

The EEGE/FEPORT Guidelines constitute a good basis for the work that has been recently launched within FEPORT to expand the methodology to other types of cargo and decrease the carbon footprint of operations which currently account for less than 10% of the total emissions in ports.

## DIGITALISATION & CYBER SECURITY

One of the main barriers to further cooperation on digital innovation is a lack of a clear framework on data ownership.

Due to this legal void, companies are hesitant to share non-personal information as they are unsure of their rights regarding how their data is used or their obligations regarding data. Electronic exchange of B2G information has the potential to increase the efficiency of supply chains.

Cybersecurity is becoming an important issue faced by all sectors of society. EU and national regulators support industry solutions and cooperation to ensure security of European transport systems.

## STANDARDISATION & SAFETY

Global container operators and their equipment and solutions suppliers have established TIC 4.0 (Terminal Industry Committee 4.0) to work on industry standards that could improve the port ship interface communication.

This dialogue will allow a closer technical interaction between terminals and manufacturers, and facilitate the uptake of new technologies and innovations such as Internet of Things, Artificial Intelligence etc... and the development of smart and sustainable operations in ports.

Furthermore, employers and employees in ports are working to contribute to the "safety first" mantra by developing a guidance on a number of specific issues to assist and support local health and safety practices in European terminals.

## FEPORT FIGURES



Source: FEPORT Members (figures 2018)

## INTERMODALITY

For the EU transport policy, the reduction of transport's negative impact remains one of the main goals. With the Paris Agreement, the transition to a modern and low-carbon economy will need to accelerate.

Terminal operators are investing in intermodal solutions and reiterate their call to regulators to further develop combined transport, directly incentivising the shift from road freight to lower emission transport modes such as inland waterways, maritime and rail.



FEPORT and its members see a great potential in intermodal transport and in its means to optimize the performance of multimodal logistic chains by promoting the use of the most efficient transport mode.

By unleashing its potential, combined transport could really become a viable alternative to road transport, thus avoiding many problems such as environment, road safety and congestion.

## NEW JOBS

The nature of port work, like other sectors, is currently evolving due to market forces and technological development.

The members (trade unions and employers) of the Sectoral Social Dialogue for Ports Committee are currently discussing these changes in the sector and should continue to receive support, as the appropriate European body for discussions on training related topics.

Continuous upgrading of equipment as well as the introduction of environmentally friendly measures imply the provision of adequate training to achieve successful results.