Port of Rotterdam
Global Hub & Industrial Cluster in Europe
Expertgroup Euro-Asian Transport Linkages

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Port of Rotterdam: Global Hub & Industrial Cluster

- Total port area 12,500 hectares = 17,500 UEFA soccer pitches (land & water);
- Throughput approx. 442 million tons in 2013 of which 12 mio containers (TEU);
- PoR is larger than numbers 2, 3 and 4 in Europe together;
- Direct gross added value €13 billion (2.1% NL GDP)
- 33,000 Sea-going vessels and 100,000 inland vessels
- Total employment 140,000 people (90,000 direct and 50,000 indirect)
European Market

- EU: 500+ mio consumers
- 65% hinterland, 35% transhipment
- 35% inland waterway transport
- 11% rail
- 54% road
Trends and developments

- Growth in volume and terminal capacity (Port Compass 2030 – 475 to 750 mio tons in 2030)
- Increased cooperation/alliances and integration of services
- Incentives for sustainable transport and more strict emission standards
Modal Shift Maasvlakte Rotterdam (GE scenario)

2012
Total 4.8 m TEU
- Road: 13%
- Inland shipping: 44%
- Rail: 43%

2035
Total 17 m TEU
- Road: 20%
- Inland shipping: 35%
- Rail: 45%
Changes in modal split containers Maasvlakte

- Road transport’s share decreasing
- Inland shipping’s share increasing
- Share of rail is decreasing

Source: terminals survey
### TEU’s grouped by continent in 2012 (transhipment & hinterland)

<table>
<thead>
<tr>
<th>Rotterdam</th>
<th>Inbound</th>
<th>Outbound</th>
<th>Total</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Europe</td>
<td>1,974,000</td>
<td>2,006,000</td>
<td>3,980,000</td>
<td>33.5%</td>
</tr>
<tr>
<td>Africa</td>
<td>197,000</td>
<td>146,000</td>
<td>343,000</td>
<td>3%</td>
</tr>
<tr>
<td>America</td>
<td>1,028,000</td>
<td>777,000</td>
<td>1,805,000</td>
<td>15%</td>
</tr>
<tr>
<td>Asia</td>
<td>2,854,000</td>
<td>2,830,000</td>
<td>5,684,000</td>
<td>48%</td>
</tr>
<tr>
<td>Oceania</td>
<td>22,000</td>
<td>28,000</td>
<td>50,000</td>
<td>0.5%</td>
</tr>
<tr>
<td>Total</td>
<td>6,075,000</td>
<td>5,787,000</td>
<td>11,862,000</td>
<td>100%</td>
</tr>
</tbody>
</table>
Hinterland Rotterdam

- 5% of road transport is cross-border
- Inland shipping: NL & DE
- Rail: Italy & East Europa
# Frequency rail connections

<table>
<thead>
<tr>
<th>COUNTRY</th>
<th>WEEKLY FREQUENCY</th>
</tr>
</thead>
<tbody>
<tr>
<td>BENELUX</td>
<td>62</td>
</tr>
<tr>
<td>ITALY &amp; FRANCE</td>
<td>159</td>
</tr>
<tr>
<td>GERMANY, SWITZERLAND &amp; AUSTRIA</td>
<td>180</td>
</tr>
<tr>
<td>EASTERN EUROPE</td>
<td>92</td>
</tr>
<tr>
<td>TOTAL</td>
<td>493</td>
</tr>
</tbody>
</table>
Betuweroute: Key to Europe

- **Dutch connection: “from sea up to Zevenaar”**
  - A15 track (bundled with the A15 highway)
  - ‘Harbour line’ (rail tracks in the Port of Rotterdam)
  - Including shunting yards and connections to port industries (e.g. container terminals)
- **Amsterdam joins at Geldermalsen**
Marketshares hinterland Port of Rotterdam 2011 (in & out, all modes of transport)
## Inbound volumes/ top 5 Rotterdam (tons, 2012)

<table>
<thead>
<tr>
<th>Country</th>
<th>Total</th>
<th>Barge</th>
<th>Rail</th>
<th>Road</th>
</tr>
</thead>
<tbody>
<tr>
<td>TOTAL</td>
<td>85,411,000</td>
<td>47,129,000</td>
<td>6,448,000</td>
<td>31,834,000</td>
</tr>
<tr>
<td>1 Netherlands</td>
<td>43,210,000</td>
<td>17,977,000</td>
<td>2,482,000</td>
<td>22,752,000</td>
</tr>
<tr>
<td>2 Germany</td>
<td>18,546,000</td>
<td>12,593,000</td>
<td>1,528,000</td>
<td>4,426,000</td>
</tr>
<tr>
<td>3 Belgium</td>
<td>13,543,000</td>
<td>10,341,000</td>
<td>772,000</td>
<td>2,430,000</td>
</tr>
<tr>
<td>4 France</td>
<td>5,233,000</td>
<td>4,404</td>
<td>162,000</td>
<td>667,000</td>
</tr>
<tr>
<td>5 Italy</td>
<td>1,168,000</td>
<td>0</td>
<td>1,043,000</td>
<td>125,000</td>
</tr>
</tbody>
</table>

Small volumes from Romania (25,000 Barge, 36,000 Road), Serbia (21,000 Barge)
## Outbound volumes/ top 5 Rotterdam (tons, 2012)

<table>
<thead>
<tr>
<th>Country</th>
<th>Total</th>
<th>Barge</th>
<th>Rail</th>
<th>Road</th>
</tr>
</thead>
<tbody>
<tr>
<td>TOTAL</td>
<td>164,803,000</td>
<td>105,171,000</td>
<td>18,485,000</td>
<td>41,147,000</td>
</tr>
<tr>
<td>1 Germany</td>
<td>69,267,000</td>
<td>49,050,000</td>
<td>13,266,000</td>
<td>6,950,000</td>
</tr>
<tr>
<td>2 Netherlands</td>
<td>54,388,000</td>
<td>26,009,000</td>
<td>2,231,000</td>
<td>26,148,000</td>
</tr>
<tr>
<td>3 Belgium</td>
<td>25,626,000</td>
<td>21,615,000</td>
<td>302,000</td>
<td>3,709,000</td>
</tr>
<tr>
<td>4 France</td>
<td>5,658,000</td>
<td>3,799,000</td>
<td>275,000</td>
<td>1,584,000</td>
</tr>
<tr>
<td>5 Italy</td>
<td>1,655,000</td>
<td>0</td>
<td>1,428,000</td>
<td>226,000</td>
</tr>
</tbody>
</table>

Small volumes to **Romania** (2.000 Barge, 3.000 Rail, 61.000 Road), **Serbia** (24.000 Barge) and **Ukraine** (22.000 Barge)
Hamburg le Havre range - market shares
• Marketshares PoR hinterland on Rail, 2012
Marketshare & TEU’s by rail from Port of Rotterdam (within, to, from and via Germany)

Italy: 50% = 188,000 TEU
Nordrhein Westfalen: 40% = 131,000 TEU
South-West Germany (Baden-Württemberg, Saarland, Hessen, Rheinland Pfalz): 16% = 100,000 TEU
Switzerland: 30% = 61,000 TEU
Czech Republic: 16% = 58,000 TEU
Austria: 19% = 41,000 TEU
Poland: 21% = 21,000 TEU
South-East Germany (Bavaria): 0% = 1,000 TEU
InlandLinks: best practice

• Online intermodal platform started in 2011 by PoR and VITO to stimulate and use intermodal transport

• Possibilities of information on the website:
  • Search for inland terminals with connection to Rotterdam;
  • Find an intermodal route between inland location and Rotterdam;
  • Find which shipping lines have empty containers available

• Facts & figures:
  • Members: > 65 terminals in Europe & > 12 shipping lines;
  • > 5.000 monthly visitors on the website.
**ROUTE 1**

Wiencont Container Terminal  
28-5-2014

Train  
1210km

Rail Service Center  
2-6-2014

CO₂ besparing 569kg  
Truckafstandbesparing 1178km  
Transittijd train: 98 uur

**ROUTE 2**

Wiencont Container Terminal  
30-5-2014

Train  
1210km

Rail Service Center  
4-6-2014

CO₂ besparing 569kg  
Truckafstandbesparing 1178km  
Transittijd train: 96 uur

**ROUTE 3**

Wiencont Container Terminal  
3-6-2014

Train  
1210km

Rail Service Center  
5-6-2014

CO₂ besparing 569kg  
Truckafstandbesparing 1178km  
Transittijd train: 46 uur
Euro-Asia transport PoR view

• New Silkroute 11,000 km of rail China-Germany
• Follow developments with great interest (TRWC)
• Mainly competing with air transport (high value, time-sensitive commodities)
• Interesting for a niche market (small volume, goods that are not sensitive to temperature changes)
• How ensure return cargoes?
• Chong Qing office in Rotterdam
Thank you!

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