Geneva, 14 June 2017

Inland ports core nodes in the hinterland

Alexander van den Bosch, EFIP Director
European Federation of Inland Ports

- Was created in 1994
- Represents over 200 inland ports in 16 countries of the European Union, Switzerland, Serbia and Ukraine
- Types of membership: full member, observers and supporting member
- The unique voice of inland ports in Europe
- An important information network for and about inland ports
- A “promoter” of inland ports
Inland ports in a storm?
## Changing markets

<table>
<thead>
<tr>
<th>Main driver(s)</th>
<th>Trends in demand for transport in 2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agricultural products</td>
<td>Harvest results</td>
</tr>
<tr>
<td></td>
<td>Decrease (1st semester) &amp; Increase (2nd semester)</td>
</tr>
<tr>
<td>Iron ores</td>
<td>Steel production</td>
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<tr>
<td></td>
<td>Stagnation</td>
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<tr>
<td>Metals</td>
<td>Steel production</td>
</tr>
<tr>
<td></td>
<td>Stagnation</td>
</tr>
<tr>
<td>Coal</td>
<td>Weather &amp; energy policy, partly steel production</td>
</tr>
<tr>
<td></td>
<td>Decrease</td>
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<tr>
<td>Sand, soil &amp; building materials</td>
<td>Construction activity</td>
</tr>
<tr>
<td></td>
<td>Increase</td>
</tr>
<tr>
<td>Containers</td>
<td>World trade</td>
</tr>
<tr>
<td></td>
<td>Increase</td>
</tr>
<tr>
<td>Mineral oil products</td>
<td>Oil prices &amp; refinery output</td>
</tr>
<tr>
<td></td>
<td>Decrease</td>
</tr>
<tr>
<td>Chemicals</td>
<td>Chemical production</td>
</tr>
<tr>
<td></td>
<td>Increase</td>
</tr>
</tbody>
</table>
Waste = material
The future?
Adapting is surviving
Intermodality: a win-win situation

Bundle cargo
- Need to consolidate cargo and to match freight flows (revision of CTD – new opportunities)
- Linear economic perspective (TEN-T corridor approach)

Digitalisation of logistics
- Interconnectivity of inland port operating systems for data services and cargo bundling in sea and land transport modes and nodes
- Specialise and linking port community systems
  - Between inland ports: Upper Rhine Ports, Saechsische Haefen
  - With sea ports: HaRoPa, Ghent-Terneuzen, Venlo, Trilogiport...

Costs
- Transhipment costs: additional transhipment and pre-/end haulage operations result in higher door-to-door costs compared to direct road haulage, in particular on short distances.
- Intermodal transport is in most cases more environmentally friendly than unimodal transport
- The TEN-T policy realising Europe’s multi modal potential
Key-role role for Ports?

- Multimodal hubs on the European Transport Corridors:
  - Interface between the maritime and land modes of transport
  - Located in the heart of urban nodes
  - Extended gates of the major seaports
- Platform for the regional economy
- Key in bringing the actors together along the transport value chain
- Interface between long distance transport and local logistics:
  - Sustainable city logistics and use of small waterways
  - Cargo bundling, innovation and smart solutions

“Inland ports play a crucial role in the multimodal logistical chain, as drivers of economic growth”, Inland Ports Platform
What’s next?
Crucial nodes in the hinterland
Maritime hinterland transport

- 60% of IWT = maritime related

**Inland waterways transport share in ports**

- Rotterdam: 45.50%
- Antwerp: 39.00%
- Hamburg: 7.80%
- Marseille: 3%
- Le Havre: 7%
- Bremerhaven: 8.10%
- Constanta: 22%

Source: CCNR & Ports

**Freight traffic in seaports**

- Rotterdam: 414.8 million tonnes
- Antwerp: 122 million tonnes
- Hamburg: 120.6 million tonnes
- Marseille: 76.2 million tonnes
- Le Havre: 64.4 million tonnes
- Bremerhaven: 54.5 million tonnes

Source: Eurostat, 2014

Modal share

- Ghent: 50%
- Amsterdam: 44%
Hinterland container transport

**Rotterdam and Antwerp: seaborne**

235 MT in 2013

400 MT expected in 2030 in Benelux scenario, 325MT in OECD scenario

**Modal shift: 2013 - 2030**

<table>
<thead>
<tr>
<th>Mode</th>
<th>Antwerp</th>
<th>Rotterdam</th>
</tr>
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<tbody>
<tr>
<td>Road</td>
<td>56% → 43%</td>
<td>55% → 35%</td>
</tr>
<tr>
<td>Rail</td>
<td>9% → 15%</td>
<td>11% → 20%</td>
</tr>
<tr>
<td>IWT</td>
<td>35% → 42%</td>
<td>35% → 45%</td>
</tr>
</tbody>
</table>

**Rotterdam and Antwerp: IWT**

82.25 MT in 2013

180 MT expected in 2030 in Benelux scenario, 142MT (OECD scenario)

*Source: Benelux and OECD, ECA*
Inland Port = Multi-modal Hub
Port Autonome Strasbourg
Inland Port = Multi-modal Hub
Port of Basel
What is needed?

From the sector:
• Innovative ideas (barges, logistics concepts, tools for cooperation)
• Companies that are willing to implement innovative ideas and shift towards new economy
• Land-use planning that leaves room for intermodal logistics and takes into account the needs of inland ports
• Availability of high quality infrastructure (rail, road, waterway, terminals)
• Good infrastructure, in particular good intermodal connections
• Active engagement with potential customers
• Strategic approach helping relevant industries settle in the port

From the EU:
• Appropriate financial framework to support the role of ports in TEN-T – Financing & funding
• Burdenless regulatory framework for the sector (e.g. NRMM, uniform Manning skills, qualifications, single window)
• Policies supporting combined transport (rail connections, Single wagon load services, IWW-friendly access of seaports, etc.)
• Reliable framework conditions for investments/state aid (e.g. GBER)
Thank you