



GLOBAL PORT INVESTMENT DRIVERS

A Middle East – Far East Perspective

Partnering progress

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Port Management



Contract Logistics



Freight Forwarding



Logistics Cities



Container Repair



Inland Transportation

Gulftainer Operational Performance Top Honors by Leading Trade Pundits



MONDAY JANUARY 20, 2014



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PORT PRODUCTIVITY

SPECIAL COVERAGE

About the JOC Port Productivity Rankings

The JOC Port Productivity rankings included in this section are based on seven rigidly defined elements provided by 17 participating carriers. Other data points such as operating time, crane density, total time a ship is in port and crane productivity will be added later.

The data points for this report are vessel name, terminal name, port city, port country, berth arrival, berth departure and number of moves (including lifts on, lifts off and re-stows). Berth arrival and departure refer to "lines down" and "lines up" — that is, the actual arrival and departure of the ship at the berth.



JOC Data Shows Improvement in Port Productivity

The latest vessel productivity numbers derived and analyzed from the JOC Port Productivity database should be welcome news for marine terminal operators and port authorities. Productivity at many terminals improved in the first six months of 2013 compared to the previous numbers covering all

TOP PORTS: EUROPE, MIDDLE EAST, AFRICA

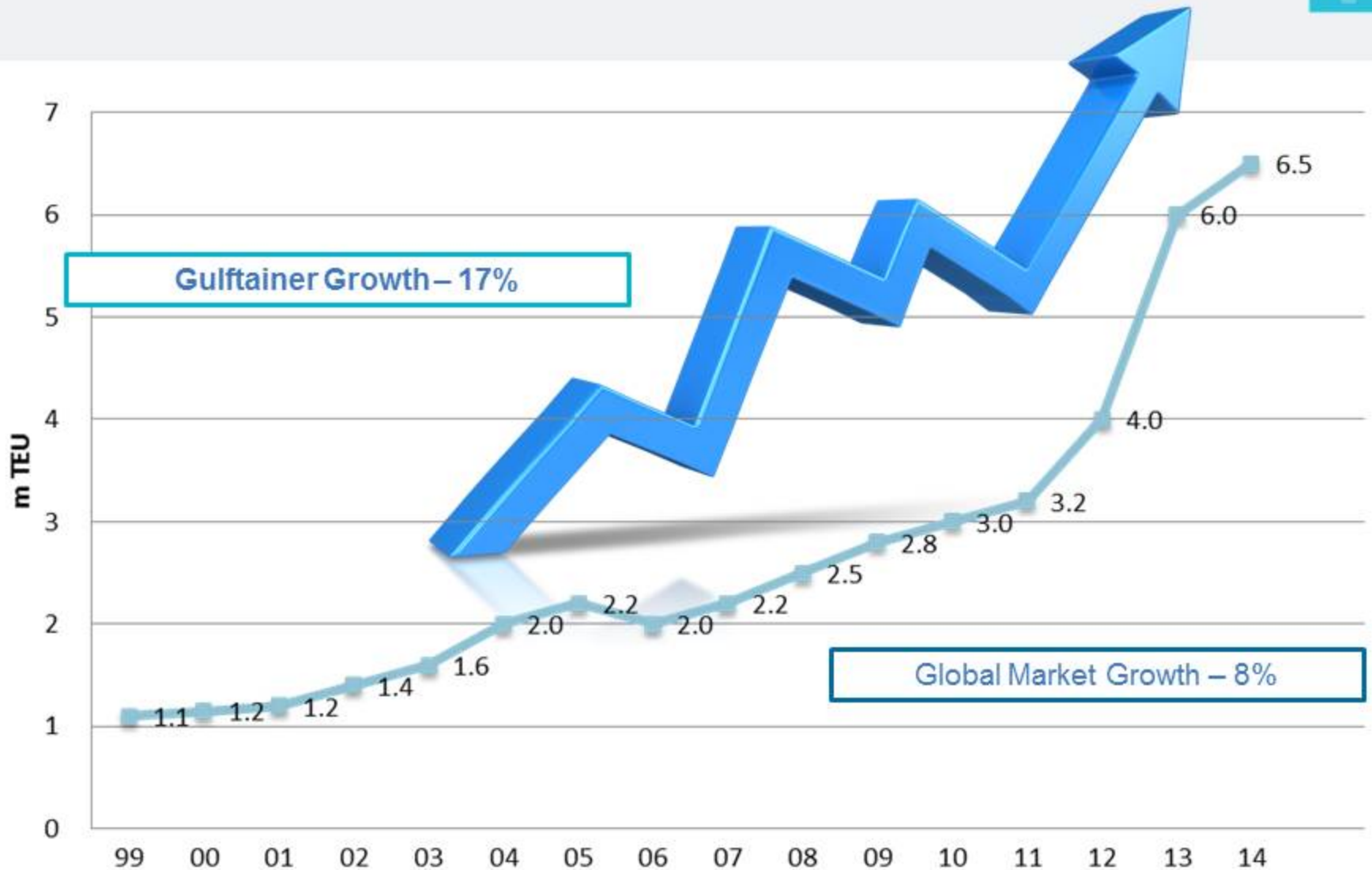
PORT	COUNTRY	BERTH PRODUCTIVITY
Khor Fakkan	United Arab Emirates	91.6
Jebel Ali	United Arab Emirates	87.2
Salalah	Oman	77.7
Southampton	U.K.	71.1
Bremerhaven	Germany	64.5
Rotterdam	Netherlands	61.3
Algeciras	Spain	59.0
Jeddah	Saudi Arabia	56.3
Antwerp	Belgium	55.4
Zeebrugge	Belgium	52.9

TOP PORTS: WORLDWIDE

PORT	COUNTRY	BERTH PRODUCTIVITY
Qingdao	China	99.6
Ningbo	China	92.5
Khor Fakkan	United Arab Emirates	91.6
Tianjin	China	90.8
Busan	South Korea	89.4
Shanghai	China	88.5
Jebel Ali	United Arab Emirates	87.2
Nhava Shiva (Jawaharlal Nehru)	India	84.9
Dalian	China	82.8
Long Beach	U.S.	82.6

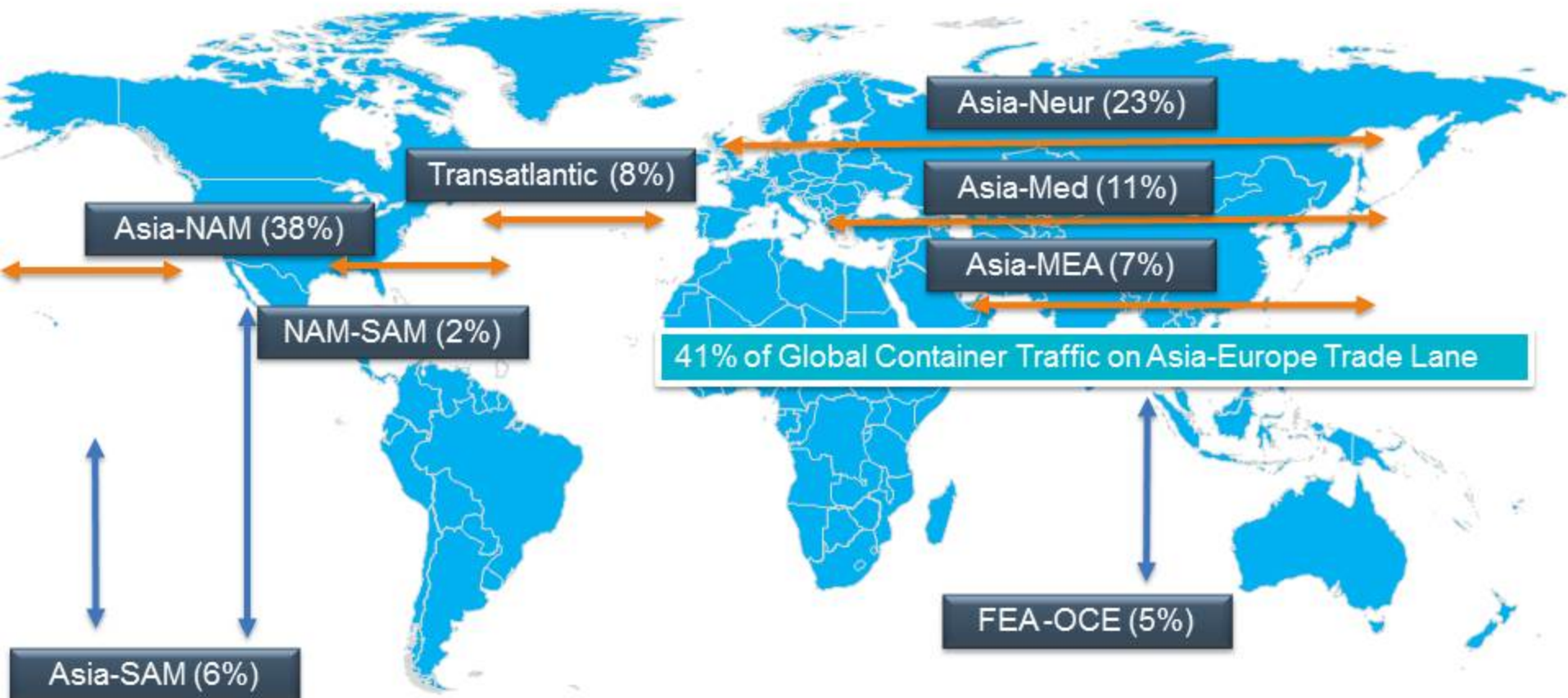
Gulftainer Container Business

Largest Private Independent Terminal Operator



The Current Major Shipping Trade Lanes

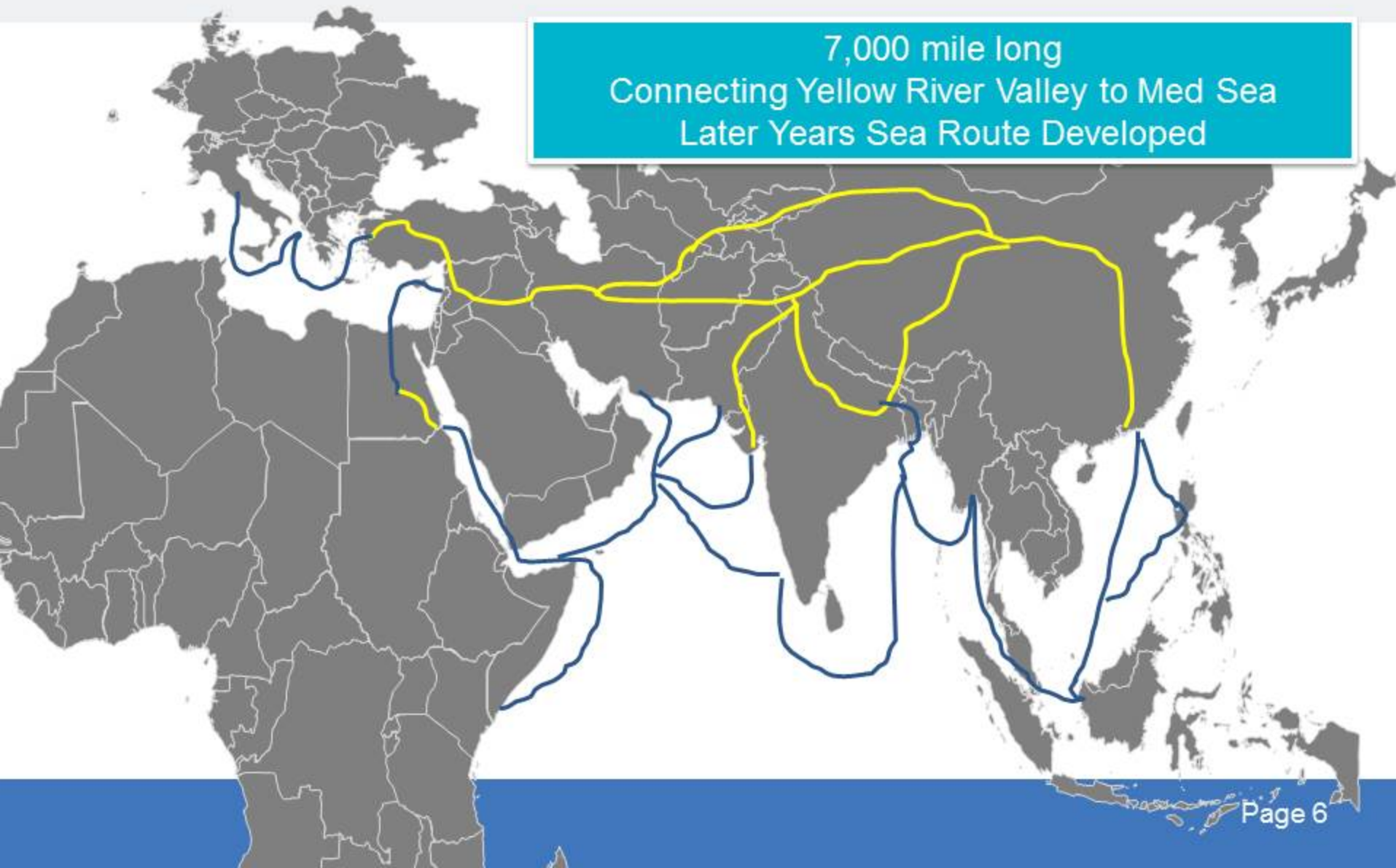
Asia – Europe Trade Dominates Global Shipping



Silk Route

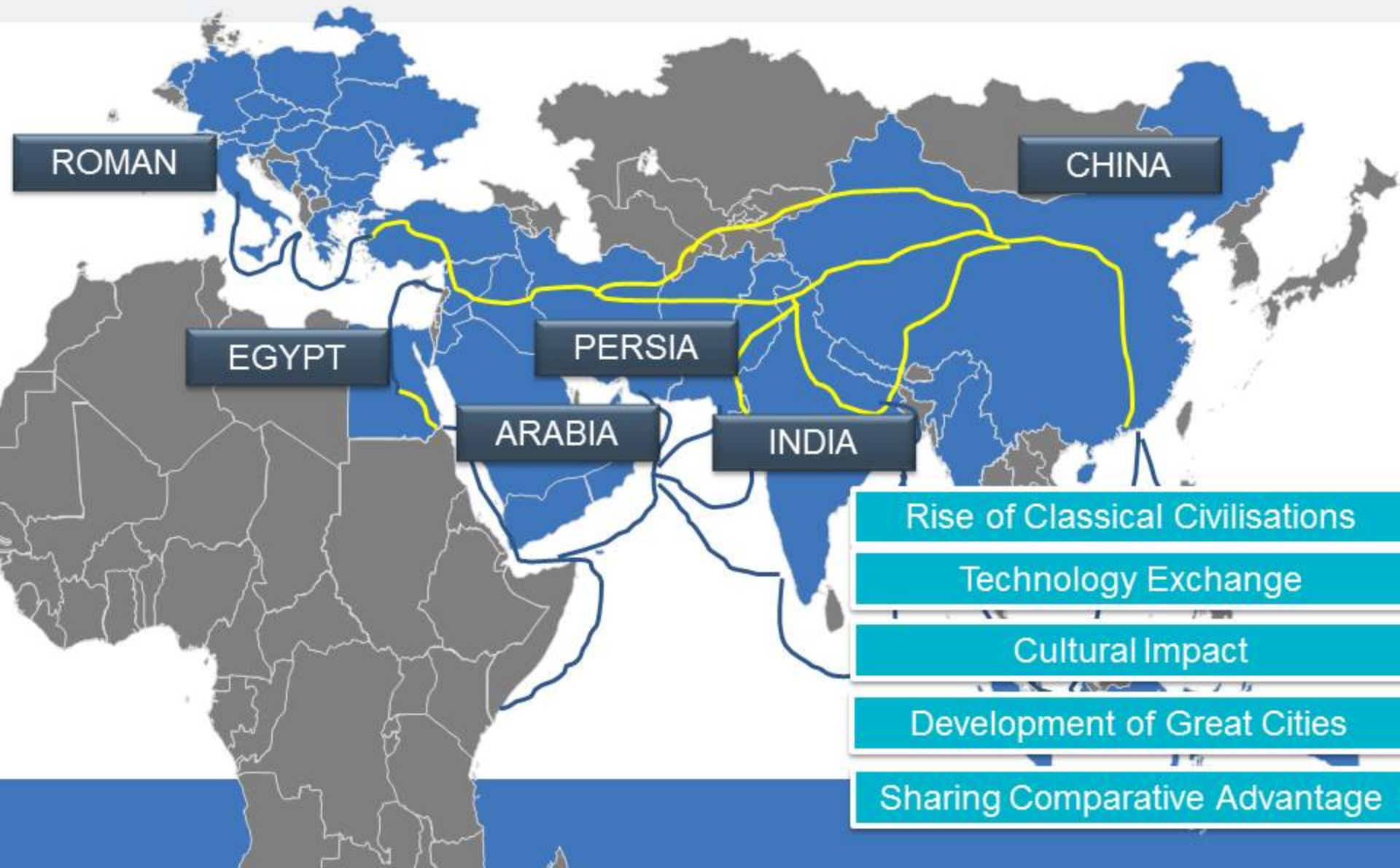
The Ancient Asia – Europe Trade Lane

7,000 mile long
Connecting Yellow River Valley to Med Sea
Later Years Sea Route Developed



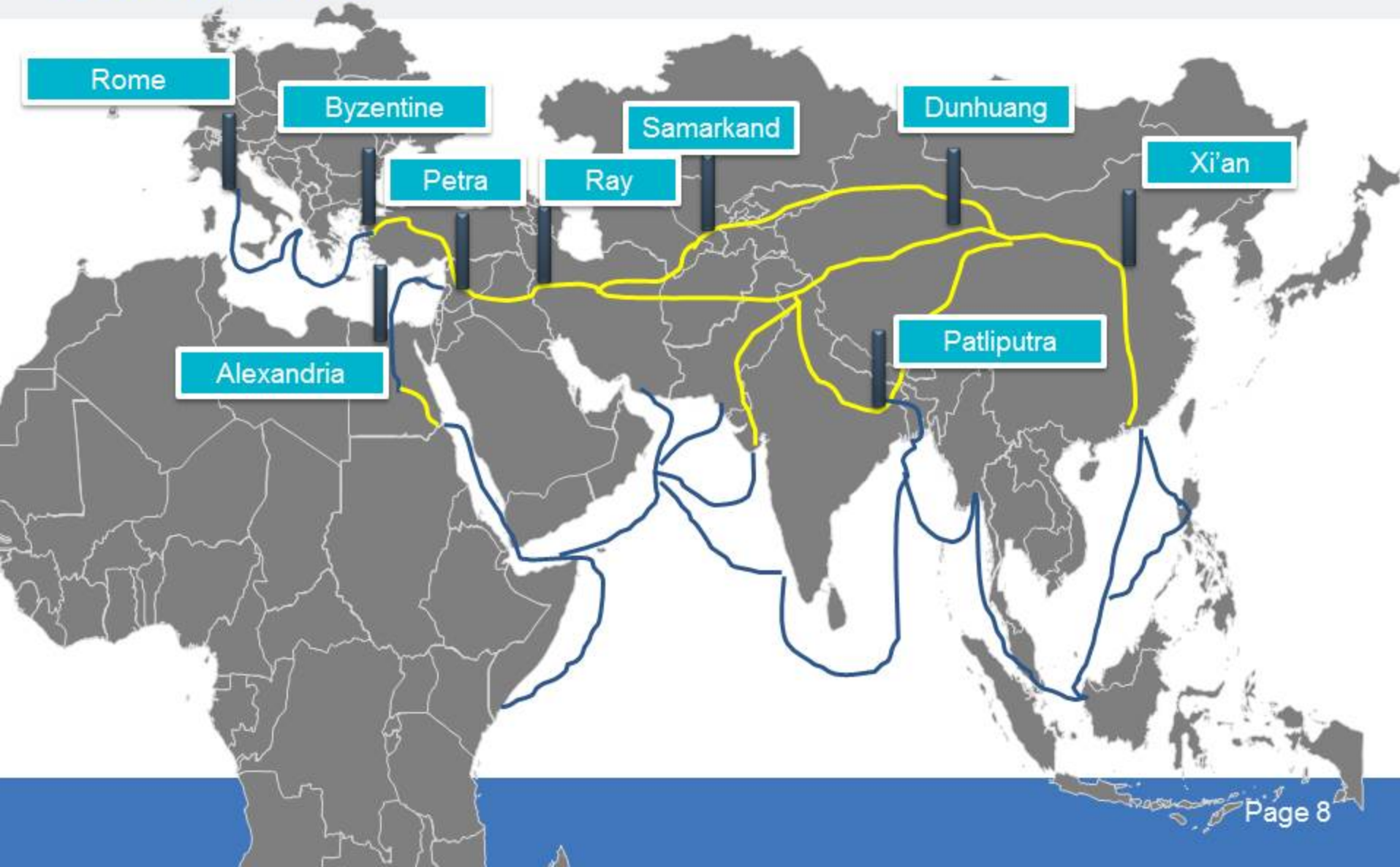
Silk Route

Ancient Trade Lane had Deep Socio Economic Impact



Rise of the Ancient Trading Hubs

Ancient Trade Lane led Rise to Great Cities with Development of Local Economies



Global Top 10 Container Ports

Changing Fortune With Shift In Trade

1980



Global Top 10 Container Ports

Changing Fortune With Shift In Trade

1990



Global Top 10 Container Ports

Changing Fortune With Shift In Trade

2000

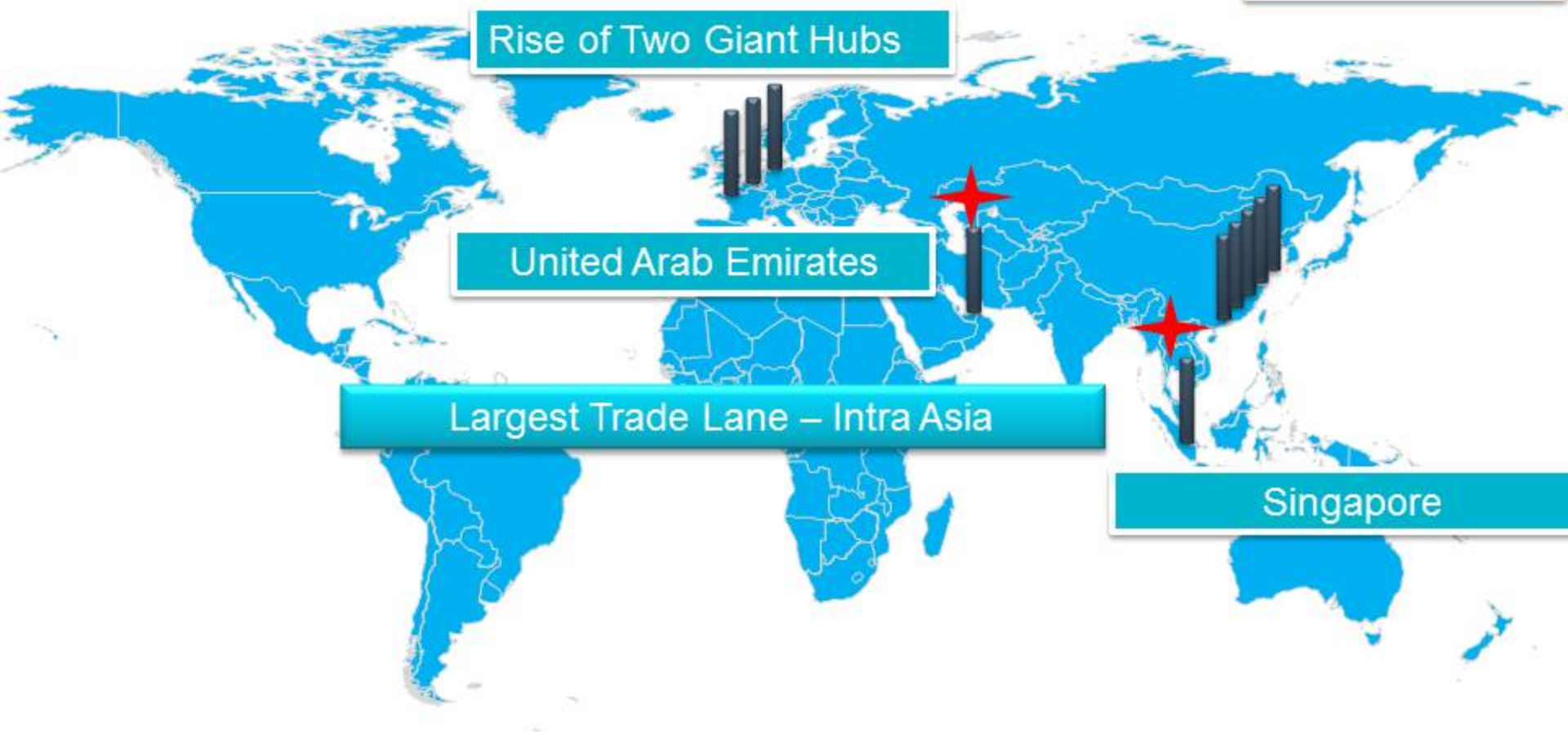


Largest Trade Lane – Asia Europe

Global Top 10 Container Ports

Changing Fortune With Shift In Trade

2014





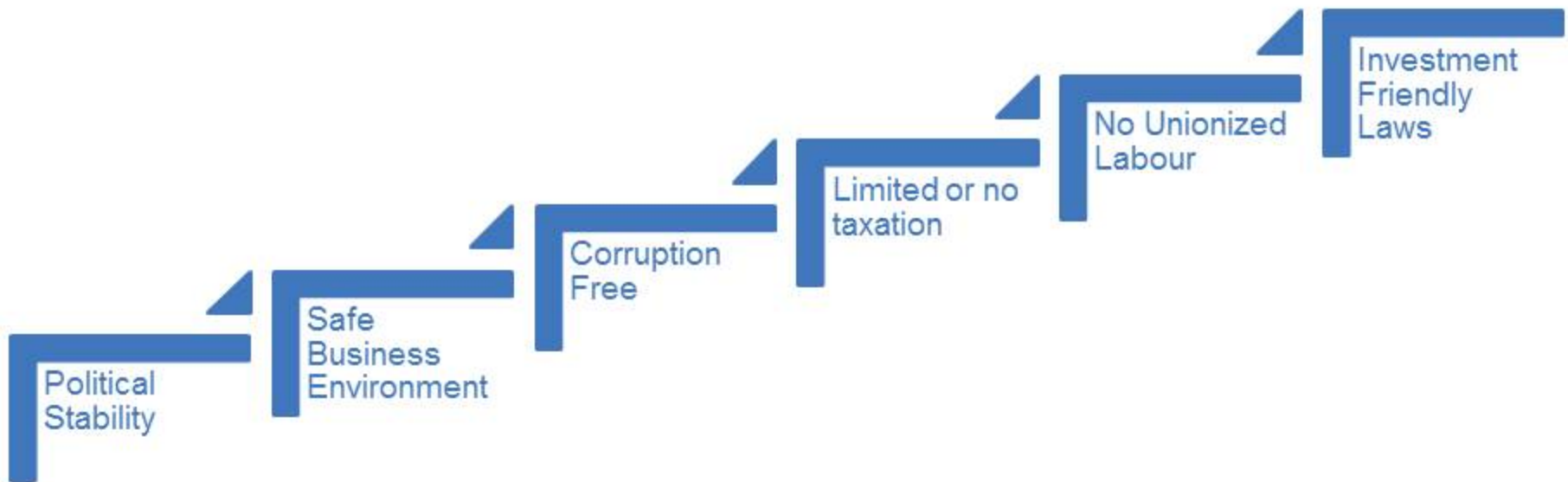
Huge Challenges

Great Responses

- Limited resources
 - Strong government driven investments
- Small local population
 - Multi cultural society with heavy contribution from immigrant population
- Small geographic area
 - Strategic location on Asia-Europe trade lane
- Young countries
 - Rank high on Ease of Doing Business Globally
 - Singapore – 1963
 - UAE – 1971
 - Regional maritime, financial and trading hubs
- Strong regional competition
 - Low financial risk ratings

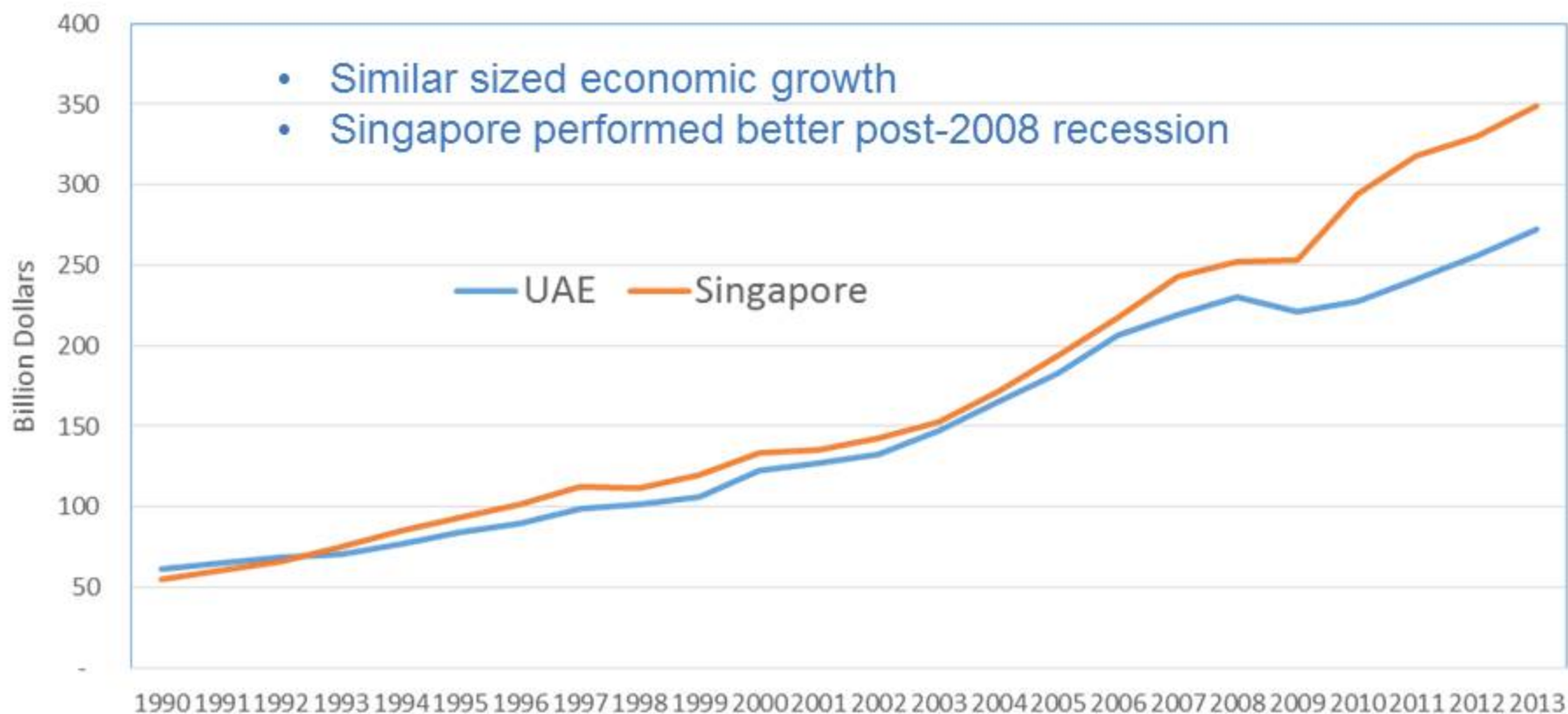
Sing - United

How Was Transformation Acheived



Sing - United

Similar Growth Trends - Economy (International Dollar PPP)

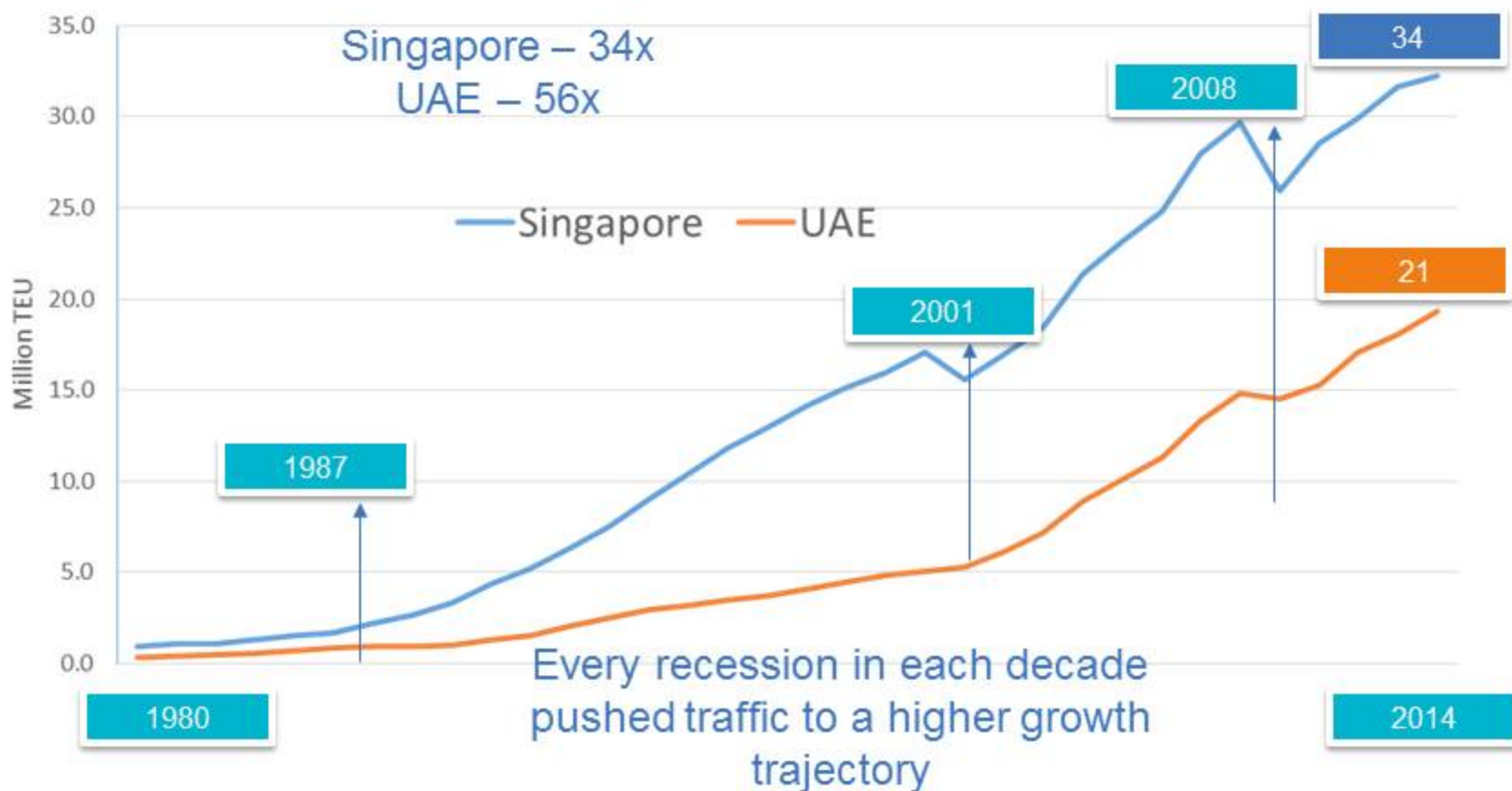


Sing- United

Both countries maximized their strategic location on Asia-Europe trade lane & followed common growth trajectories



Last three decades growth



Sing - United

Large Investments in Container Handling Infrastructure



Handling Capacity (Mn teu)

35

27

Investment (US\$ Billion)

12.0

8.0

Planned Expansion (Mn teu)
Next Decade

30

7

Planned Investment (US\$ Billion)

9.0

2.0

Sing - United

Maritime Growth had Deep Socio Economic Impact



THAT



THIS



Sing - United

Maritime Growth had Deep Socio Economic Impact



and THAT

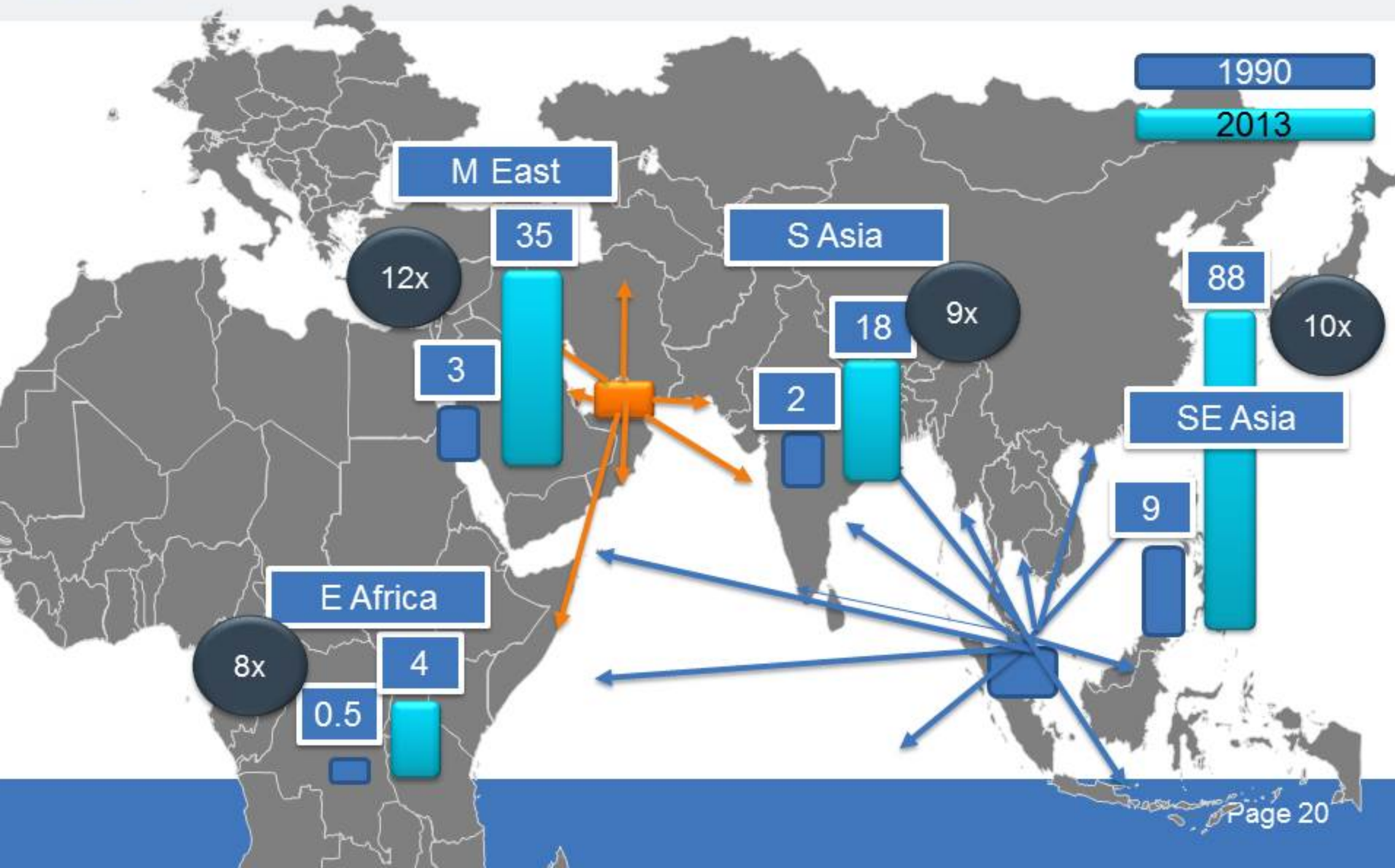


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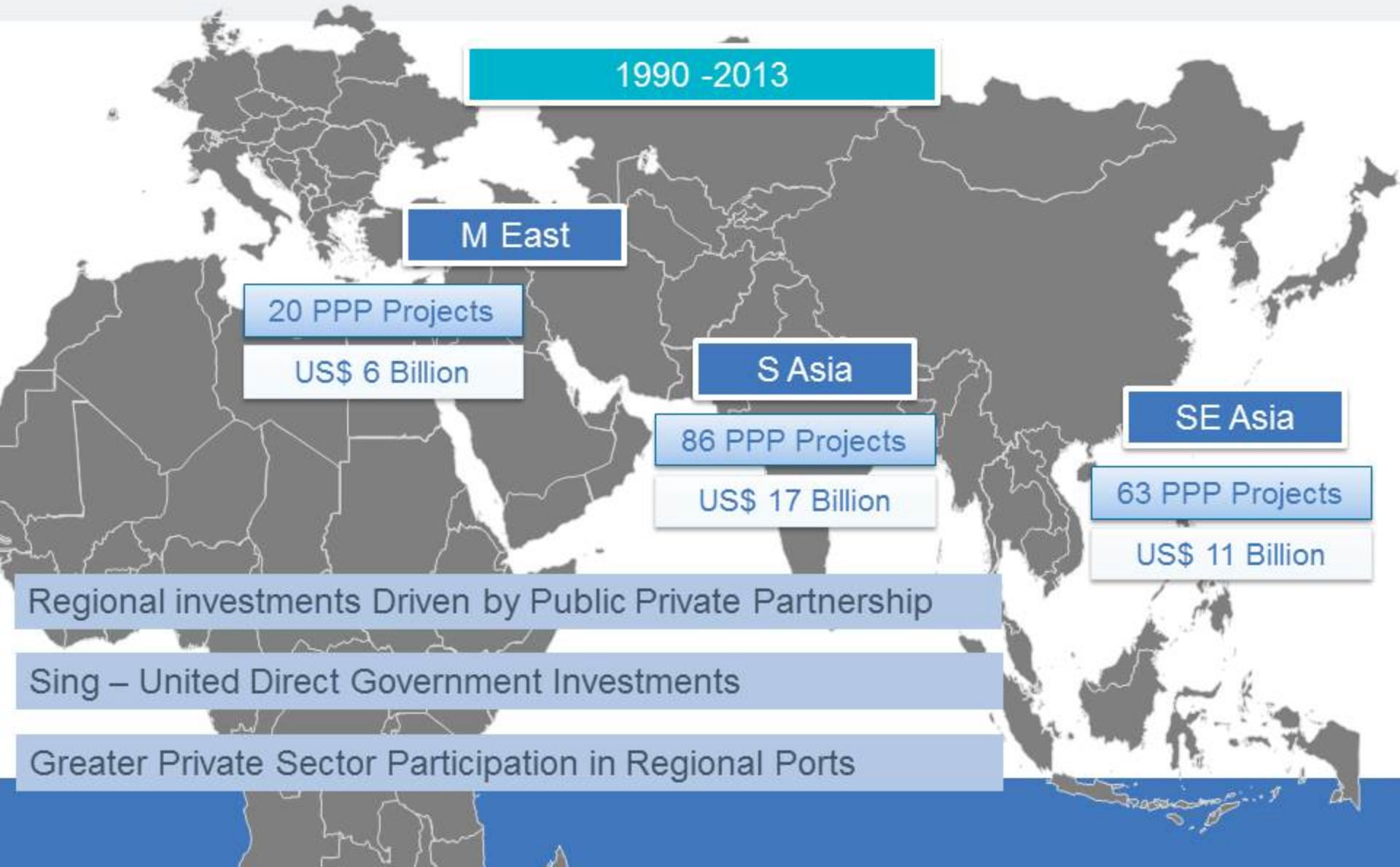
Regional Growth

Rise of Sing-United was driven by regional economic and maritime growth



Port Investment

Regional Port Investment in Stark Contrast of Sing-United



1990 -2013

M East

20 PPP Projects

US\$ 6 Billion

S Asia

86 PPP Projects

US\$ 17 Billion

SE Asia

63 PPP Projects

US\$ 11 Billion

Regional investments Driven by Public Private Partnership

Sing – United Direct Government Investments

Greater Private Sector Participation in Regional Ports

- Regional economic growth
- Growth rate on the East-West trade lane – especially Asia - Europe
- Routing pattern due to emerging shipping alliances
- Handling capacity at the regional hubs
- Development of labour and investment friendly environment
- Technological advancement and infrastructure investments
- Ability to provide value added services in the supply chain

Conclusion

Learn from past to prepare for future



- Sing-United are built on inherent strength on unique socio-political structure
- Regional countries should not copy their strategy as success mantra
- Regional countries have developed through different investment and growth strategy
- Priority should be to remain relevant on the trade lane
- Focus on local industry, services, education, technology and banking



Thank You

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