

Barcelona, your partner in the WestMed

4th BLACK SEA PORTS AND SHIPPING
CONFERENCE
ISTANBUL



Port de Barcelona

Lluís París, Commercial Manager
May 2015

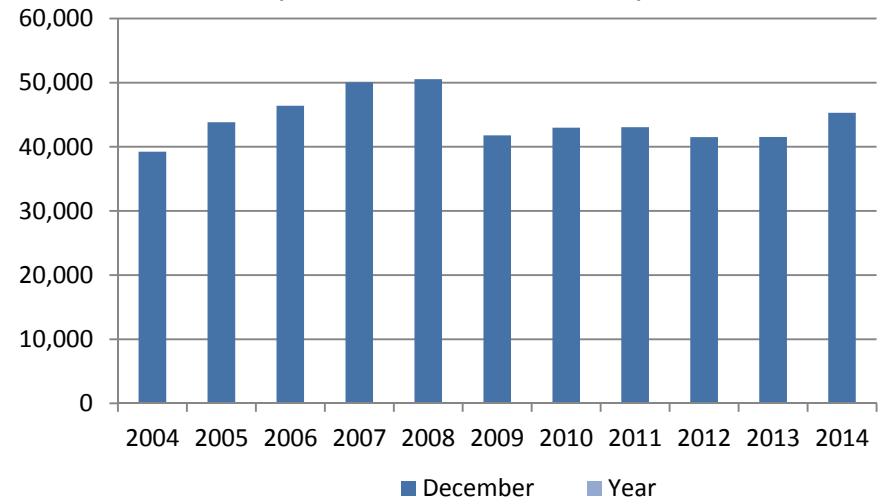


A unique port due to its specialisation in different traffics

Traffic 2014

Total traffic	45.3 M MT
Container	1.9 M TEU
Vehicles	748,394 Units
Ro-Ro traffic	327,065 ITUs
Passengers	3.5 M Pax

Total traffic in the Port of Barcelona 2004-2014
(Thousands of tons)



Over 30% of cargo is to/from Mediterranean

→ A highly specialised port

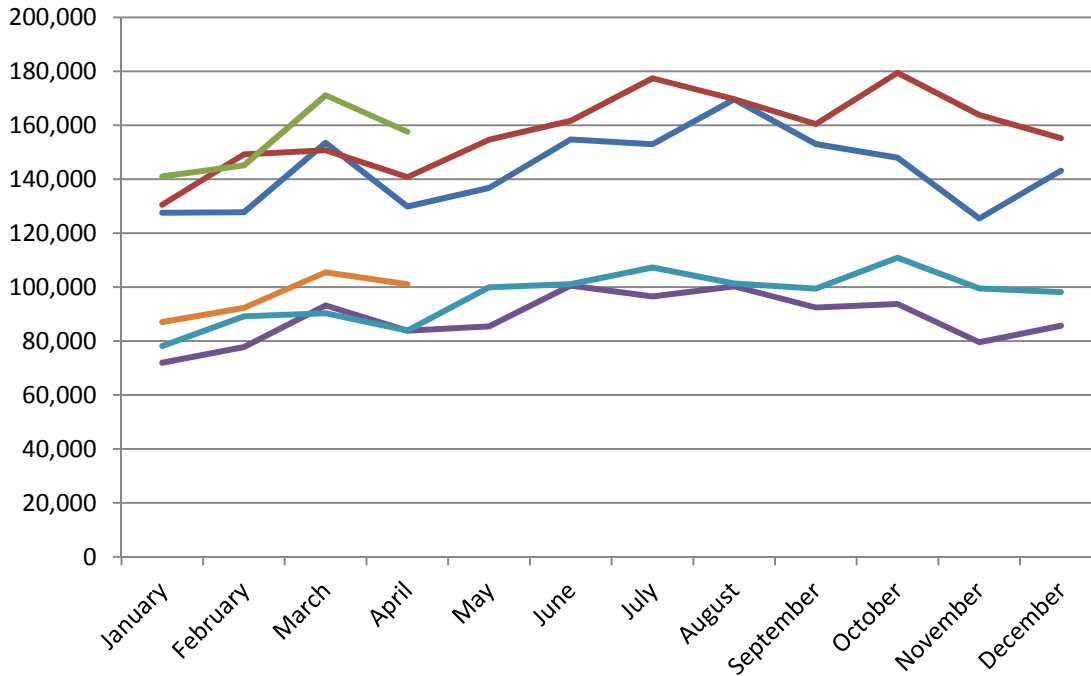




Port of Barcelona statistics. TEU traffic

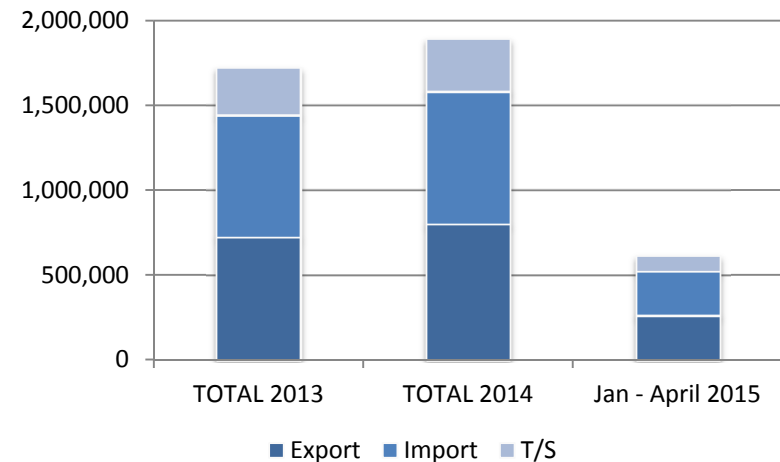
Total traffic 2014: 1,9 M Teu
9.9 % increase vs. 2013

First third 2015
7.4 % increase vs. 2014



- Total 2013
- Total 2014
- Total 2015 Jan.-April
- Full Import Export 2013
- Full Import Export 2014
- Full Import Export Jan- April 2015

	2013	2014	Jan - April 2015
Export	723.415	800.957	261.660
Import	718.668	780.114	261.972
T/S	280.325	312.536	91.294
TOTAL	1.722.407	1.893.607	614.925

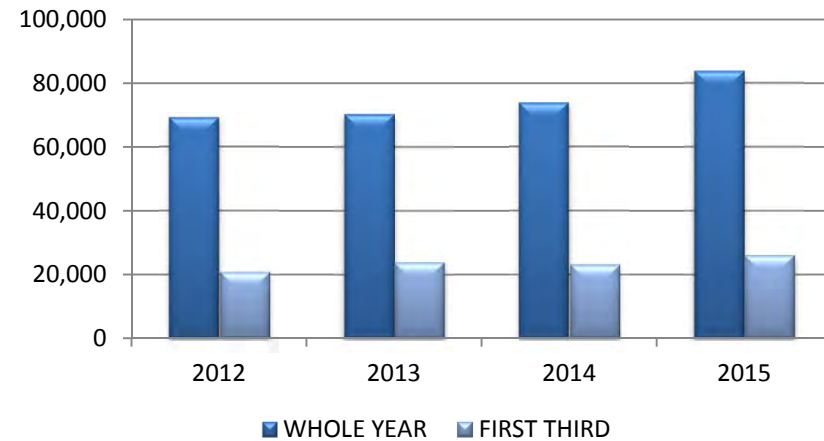




Port of Barcelona statistics. Car traffic volumes: EAST MED

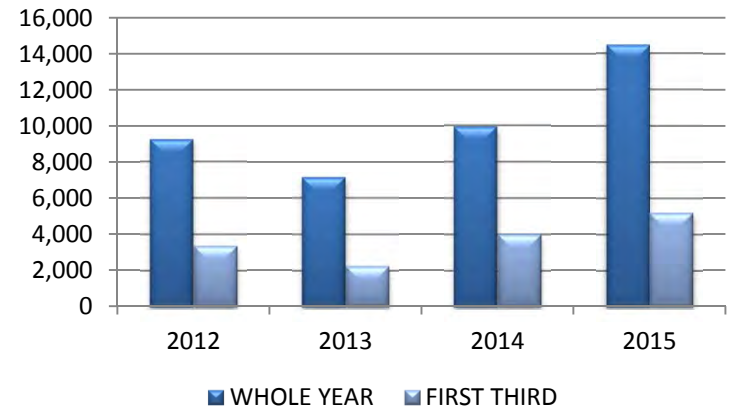
EXPORT Barcelona – East Med

	2012	2013	2014	2015
WHOLE YEAR	69.365	70.467	73.922	84.000
FIRST THIRD	20.960	24.016	23.340	26.285



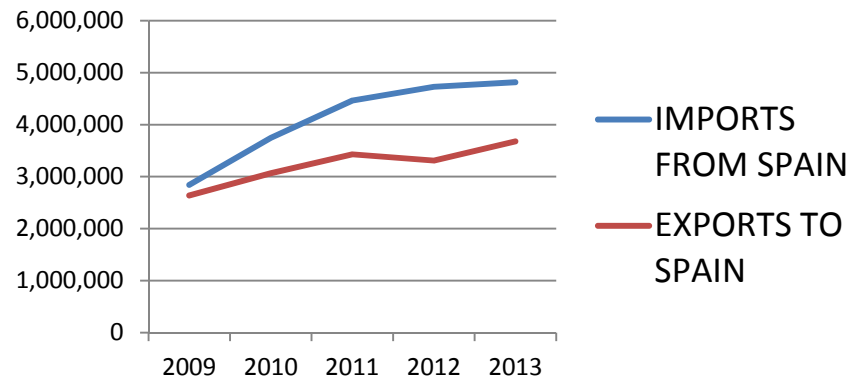
IMPORT East Med - Barcelona

	2012	2013	2014	2015
WHOLE YEAR	9.245	7.162	9.957	14.500
FIRST THIRD	3.385	2.276	4.024	5.226





Market. Main products Turkey / Spain



MAIN IMPORTS FM SPAIN

- Automotive (cars and parts): 27%.
- Chemical products: 14%.
- Textile materials and apparel: 26%.

MAIN EXPORTS TO SPAIN

- Textile materials and apparel: 39 %.
- Automotive (cars and parts): 13%.
- Appliances, chemical products, frozen fish: 25%

Growing number of products on the trade



Port de Barcelona: strategy

Main logistics hub in the Southern Europe and the Mediterranean



**Enlargement
of the Port and
Logistics areas**



**Improved
connectivity with
hinterland and
foreland**



**Client-oriented:
competitiveness, quality,
proactivity, efficiency**



Port de Barcelona positioning. A South European hub.

- ✓ Only Spanish port **linked to EU rail network TODAY. UIC connections right in the terminals.**
- ✓ **Reduces direct transit time by 3/4 days** and saves fuel and CO2 on routes from/to the East.
- ✓ A port **OUTSIDE the ECA** zone in N. Europe. We keep using conventional fuel on 2015.
- ✓ Volume forecasts to Middle and Far East are increasing.
- ✓ Substantial reduction of port taxes for car manufacturers and car carrier operators.
- ✓ Direct rail services already operating between most national factories.
- ✓ Currently concentrating cargo from Spain, 2nd passenger cars builder within EU.
- ✓ Chosen as a **West Med hub** by shipping lines. Great availability of transport options.

Barcelona – Guangzhou	22.5 days
Bremerhaven - Guangzhou	28 days





A diversified port: traffic distribution areas



Port de Barcelona: Offering solutions for all



Enlargement of the Port and Logistics areas

Developments and international private investments



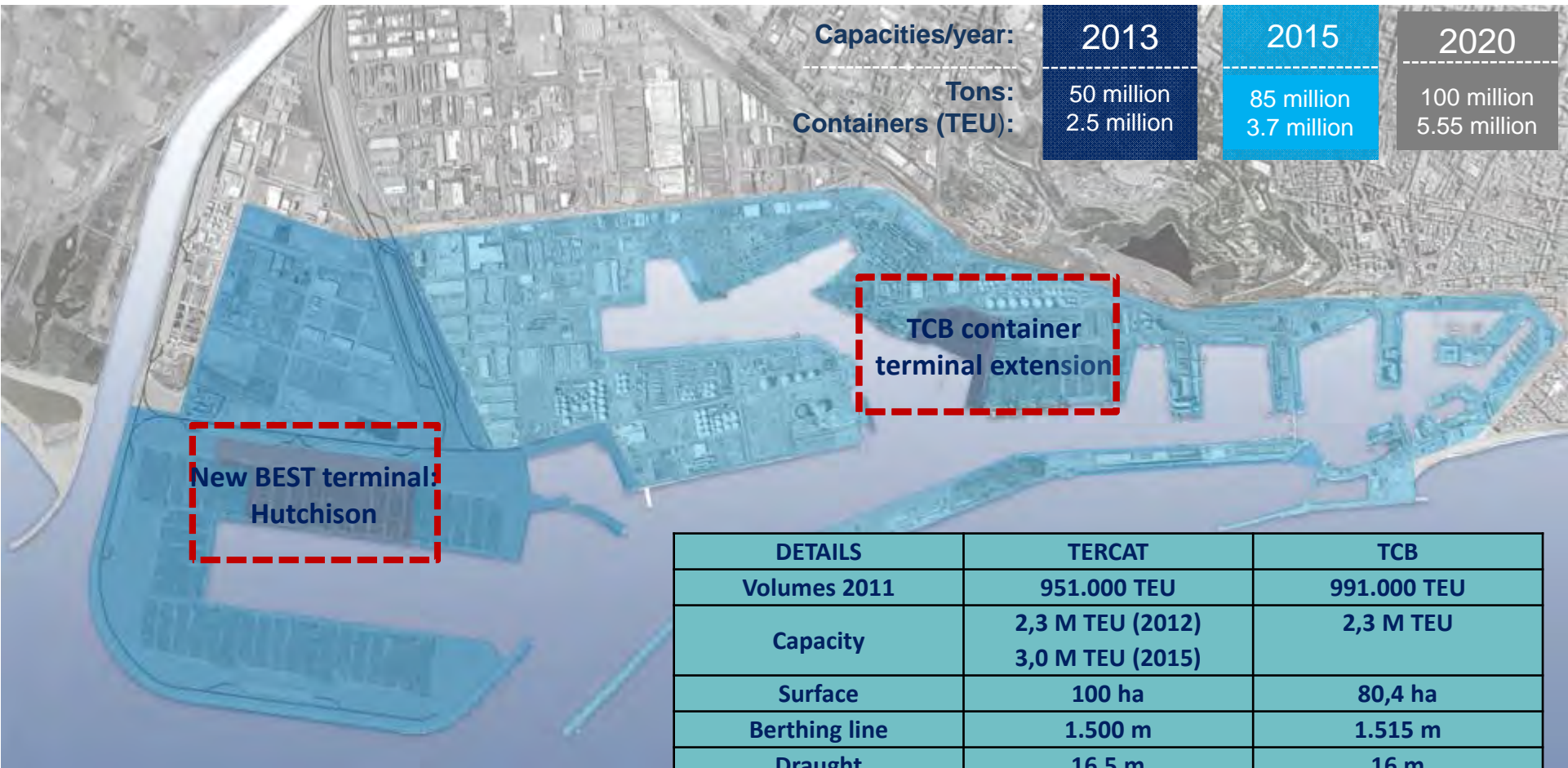
Ongoing projects	Investment (million €)	Finished projects	Investment (million €)
1 New BEST terminal (Hutchison)	500	11 Terquimsa: capacity expansion	10,4
2 Marina Port Vell	35	12 Grimaldi Terminal Barcelona	22
3 Marina Nova Bocana	30	13 Total Petrochemicals Iberica (styrene pipe)	1,1
4 Tepsa: facility remodeling	14,45	14 Marina Barcelona 92	13
5 Expansion of container terminal (TCB)	27,3	15 Tradebe	60
6 Improved processing plant (Bunge)	13,2		
7 Iberpotash	20-30		
8 Expansion cruises terminal D	5,25		
9 New cruise terminal E	42		
10 Manipuladora de mercancías SL (SAMER)	9,2		

More than 2.000 million € of private investment engaged 2000-2014



Enlargement of container terminals

More surface, more capacity: more opportunities



Capacities/year:	2013	2015	2020
Tons:	50 million	85 million	100 million
Containers (TEU):	2.5 million	3.7 million	5.55 million

DETAILS	TERCAT	TCB
Volumes 2011	951.000 TEU	991.000 TEU
Capacity	2,3 M TEU (2012) 3,0 M TEU (2015)	2,3 M TEU
Surface	100 ha	80,4 ha
Berthing line	1.500 m	1.515 m
Draught	16,5 m	16 m



Enlargement of container terminals: BEST

DATA 2015

BEST 2015	
Capacity	1.5 M TEU
Area	79 ha
Berthing line	1.500 ml
Draught	16 m
Quay cranes	11
Blocks	24
ASC	48
Shuttle carriers	26
RMG	2
Reefer plugs	1700

Railway terminal	
8	Rail tracks (750mts each)
Total rail tracks of 21Km (Mixed gauge UIC-Iberian)	
2 RMG	

BEST End of Works phase 1	
Capacity	2.6 M TEU
Area	100 ha
Berthing line	1.500 ml
Draught	16 m



First semi-automated terminal in the Mediterranean



BEST terminal: enlargement process





Enlargement of container terminals: TCB

TCB has increased the height of 3 Super Post Panamax up to 47m under spreader

DATA 2015

TCB terminal	
Capacity	2.3 M TEU
Area	80,4 ha
Berthing line	1.515 ml
Draught	16 m
Quay cranes	13
Reach Staker	3
Fork lift	10
Straddle carrier	62
Reefer plugs	486

Railway terminal
6 Rail tracks (750mts each) (Mixed gauge UIC-Iberian) 3 RMG





TCB: Intermodal facilities





Focused in high productivity



- The Port of Barcelona got award at the JOC Europe Port Performance Conference
- 3rd position in terms of productivity among European ports.
- The two container terminals of the Port of Barcelona are among the first 10 terminals in Europe, with a productivity between 76 and 80 movements/ship/hour.





Media are aware


Port de Barcelona

Press Release

21 November 2014

Port of Barcelona ranks third for productivity

The Port's two container terminals, TCB and BEST, feature among the top ten in Europe's productivity index

The commitment by the terminals to improve operations has paid off. The JOC report corresponding to the first half of 2014 ranks **TCB 8th European terminal for productivity**, with 80 movements per hour, with **BEST coming in 9th** with 76 movements per hour.



Cruises: Excellence in operations. Forth World Port i cruise traffic

Two awards by *Cruise Insight Magazine* during the *Cruise Shipping Miami trade Show 2015*

- ❑ “Best turnaround port operations”
- ❑ “Most Efficient Terminal Operations”



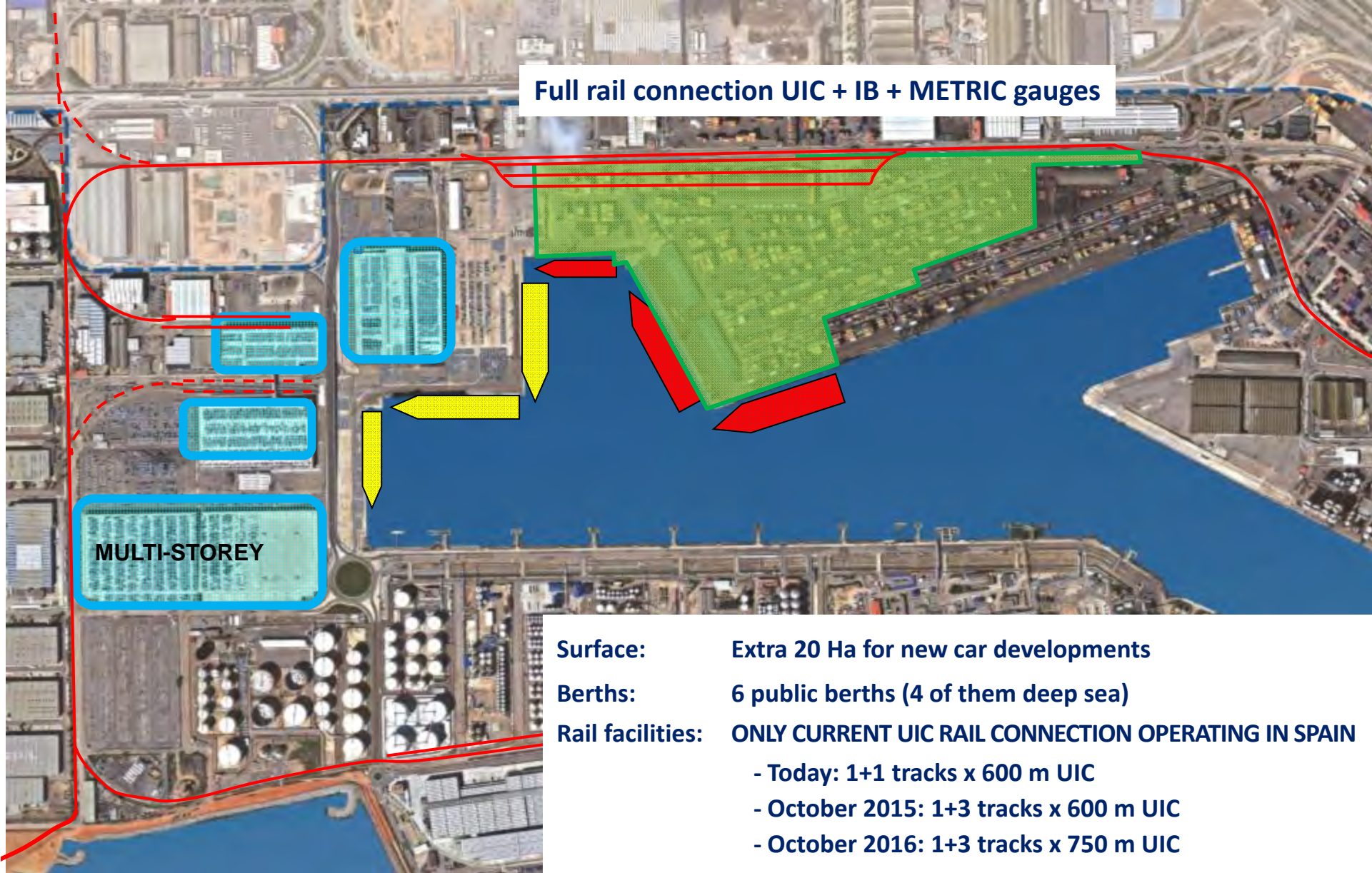


Enlargement of the Port and Logistics areas: PORT NOU Multipurpose terminal





Port infraestructures: Fully developed and connected car terminals



Full rail connection UIC + IB + METRIC gauges

MULTI-STOREY

- Surface:** Extra 20 Ha for new car developments
- Berths:** 6 public berths (4 of them deep sea)
- Rail facilities:** **ONLY CURRENT UIC RAIL CONNECTION OPERATING IN SPAIN**
 - Today: 1+1 tracks x 600 m UIC
 - October 2015: 1+3 tracks x 600 m UIC
 - October 2016: 1+3 tracks x 750 m UIC



Development of rail facilities in the port terminals.

Current and growing standard **UIC** tracks

CAR TERMINALS (DARSENA INT. & CAMPA Z)

TODAY: 4 x 225 m IB + 2 x 280 m IB + UIC

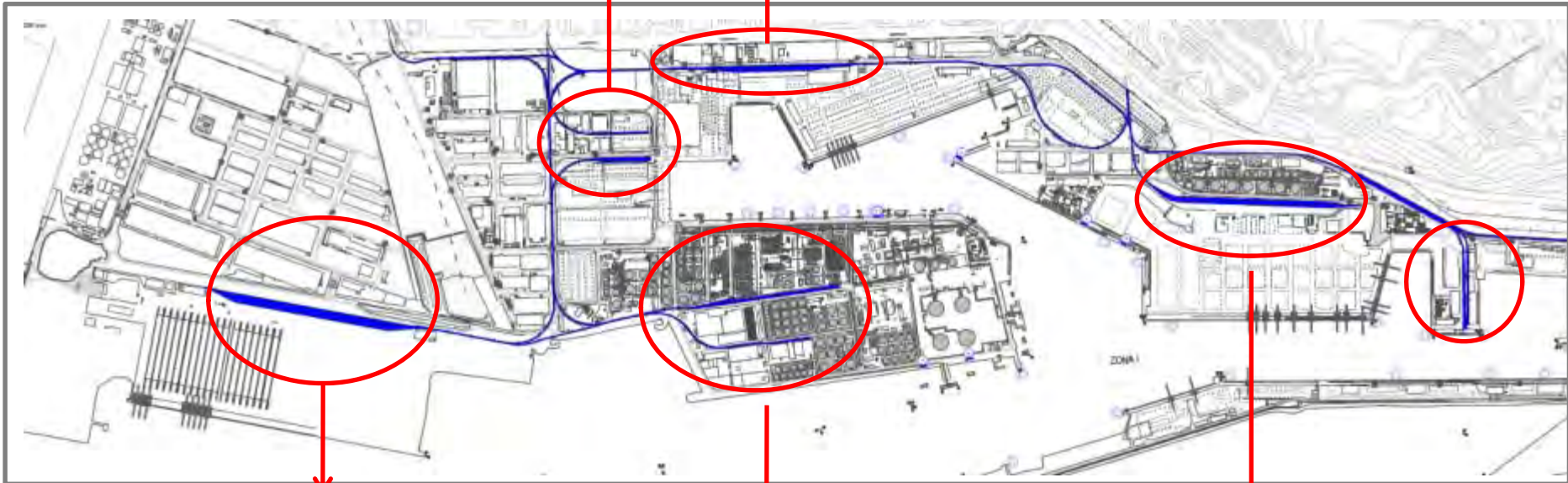
2015: Enlargement of IB tracks at Dársena Interior to bring here all the IB traffic

CAR TERMINALS (PRINCIPE DE ESPAÑA)

TODAY: 1 + 1 tracks UIC (600 m)

2015: 1 + 3 tracks UIC (2 x 600 m + 1 x 530 m)

2016: 1 + 3 tracks UIC (750 m)



BEST

8 Tracks UIC (750 m)

ENERGY WARF

TODAY: 3 tracks UIC (680 m)

300 m AWAY FROM CAR TERMINAL

TCB

6 tracks UIC (750m)



Liner container services: the best connectivity



More than 100 regular lines and 163 shipowners.

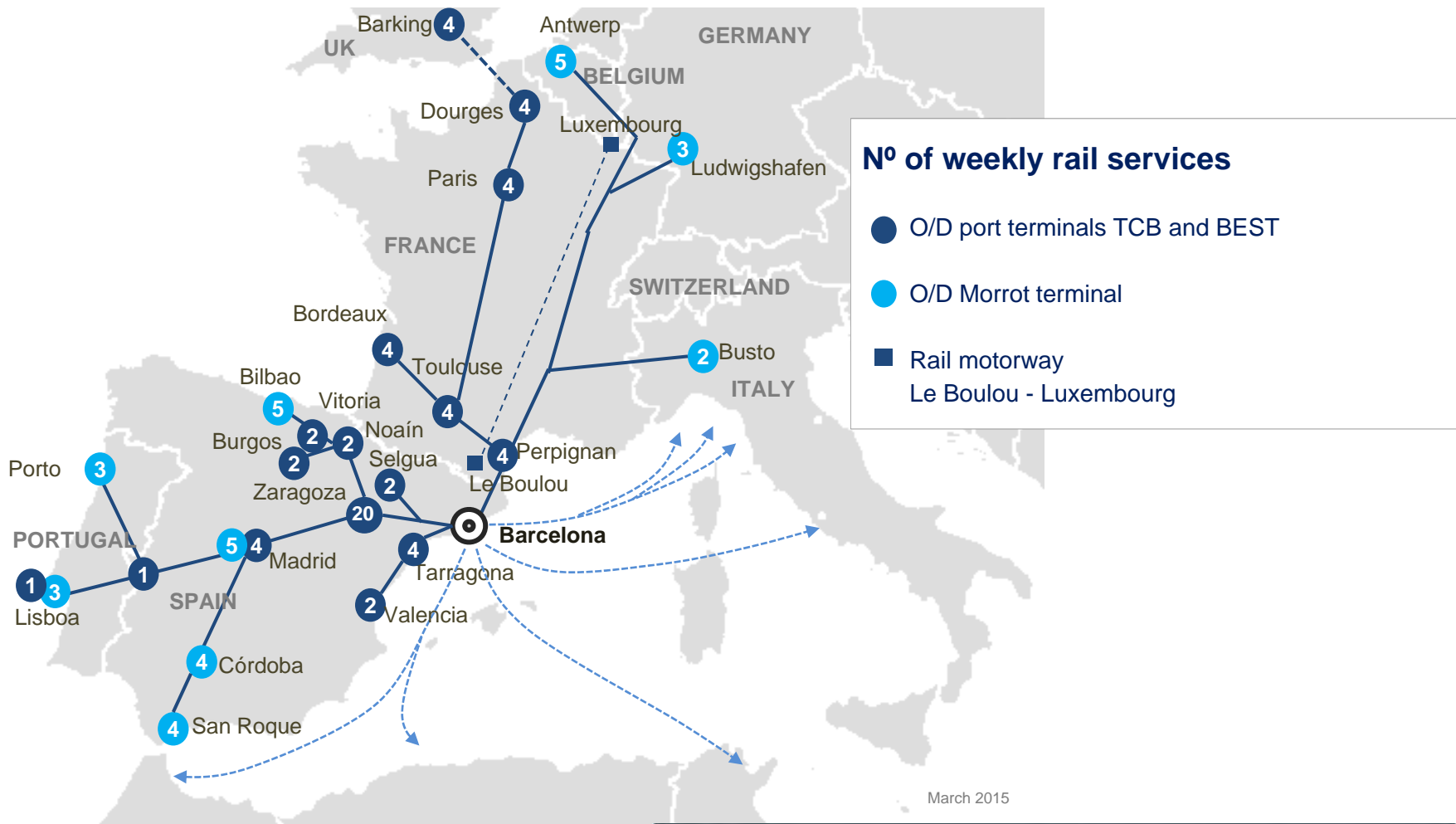
Wide range of feeder and Short Sea Shipping services in the Mediterranean.

Weekly connections linking to the main world ports.





Railway services from the Port of Barcelona to the Iberian Peninsula and Europe



March 2015





Rail traffic evolution in the Port of Barcelona



	2006	2007	2008	2009	2010	2011	2012	2013	2014
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TEUs

2006	37.070	41.770	52.562	59.544	103.898	146.685	148.926	154.522	189.553
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TOTAL increase

-23,00%	13,00%	26,00%	13.2 %	75,00%	41,00%	1,50%	+3.7%	22,67%
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Railway share over total traffic

2,50%	2,60%	3,00%	5,00%	8,00%	10,70%	11,32%	10,70%	11,99%
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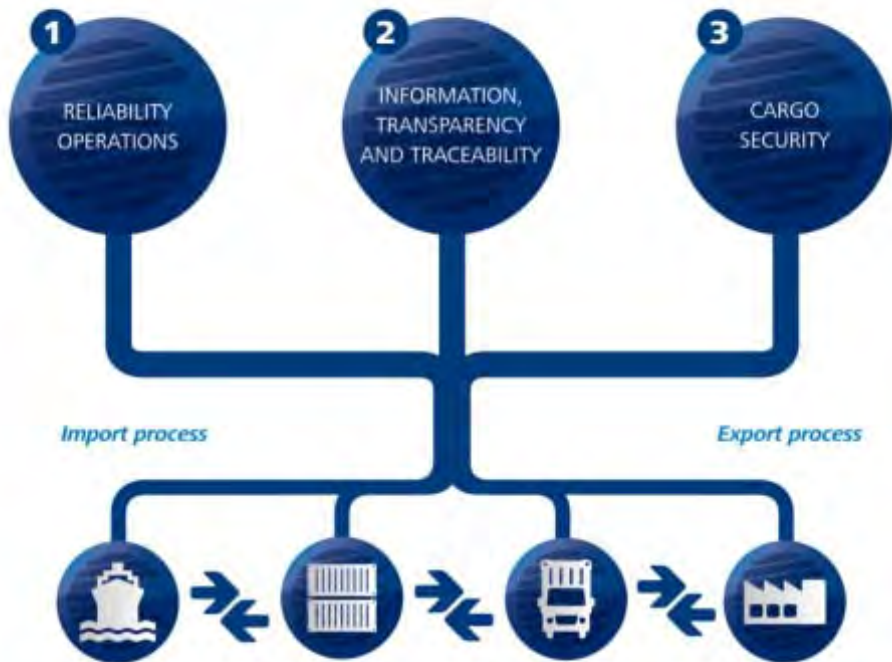


Efficiency Network

Efficiency Network is a commitment to quality and efficiency of service between the companies and institutions involved in maritime transportation at Port de Barcelona.

78 Certified companies: Freight Forwarders, Shipowners, Transport companies, Terminals

Efficiency commitments



- 1 RELIABILITY OPERATIONS**
 - Arrival or departure of container
 - Loading and unloading
 - Bill of lading procedures
- 2 INFORMATION, TRANSPARENCY AND TRACEABILITY**
 - Customs clearance
 - Freight inspections
 - Container handling
- 3 CARGO SECURITY**
 - Border inspection post inspection and scanner
 - Hazardous materials authorization
 - Entering or leaving the port area





Quality commitments

RELIABILITY OF OPERATIONS

- Delivery and collection of goods at committed time
- Customs Clearance within 17 hours.
- When BIP inspection required, Custom Clearance of goods within 25 hours.
- Bill of lading available 10 hours after ship's departure.

INFORMATION AND TRANSPARENCY

- Provide reliable information concerning operations and cargo in the Port.

SECURITY OF GOODS

- No incidents on goods during their stay at Port.
- Import containers will be delivered with the same seal they had at their departure from the terminal.

Breach of these commitments will be compensated with 60€ to 450€



Port de Barcelona