

BALANCE FOR GROWTH: TOWARDS A GLOBAL SHIPPING & LOGISTICS NETWORK

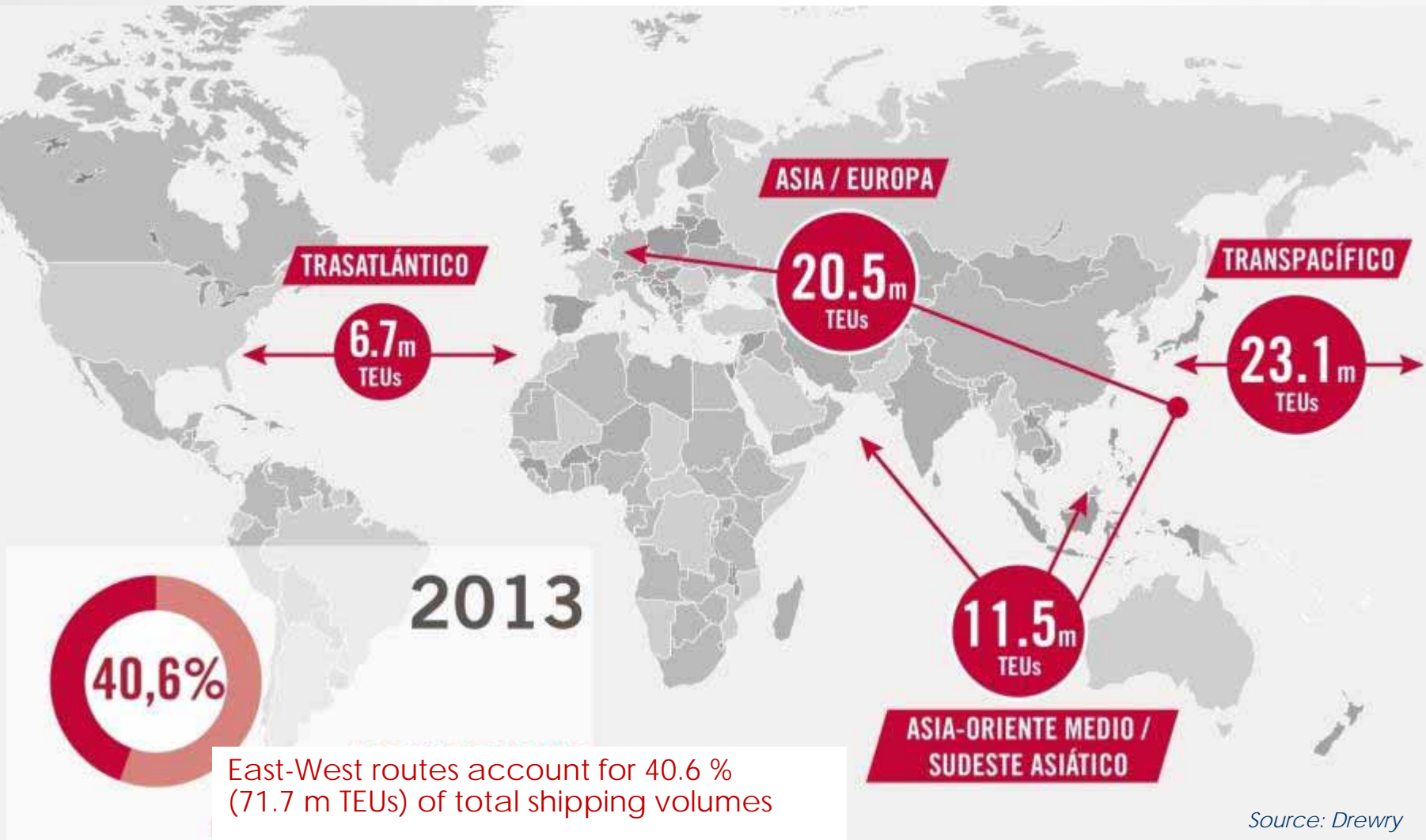
3rd Med Ports Conference, Casablanca, March 26th 2015



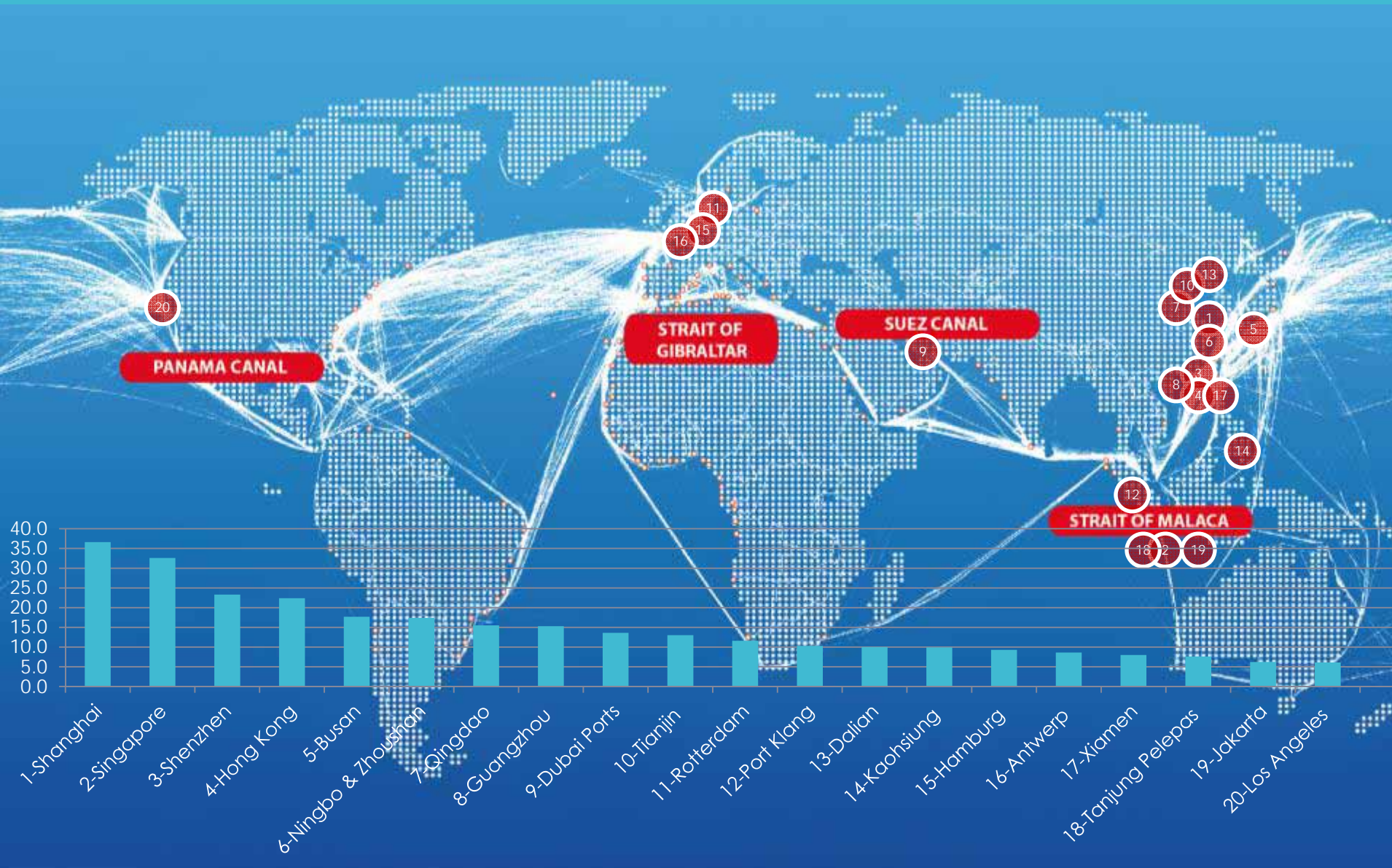
Gerardo Landaluce
Development & Commercial Director
Port Authority of Algeciras Bay



MAIN SEA TRADE FLOWS

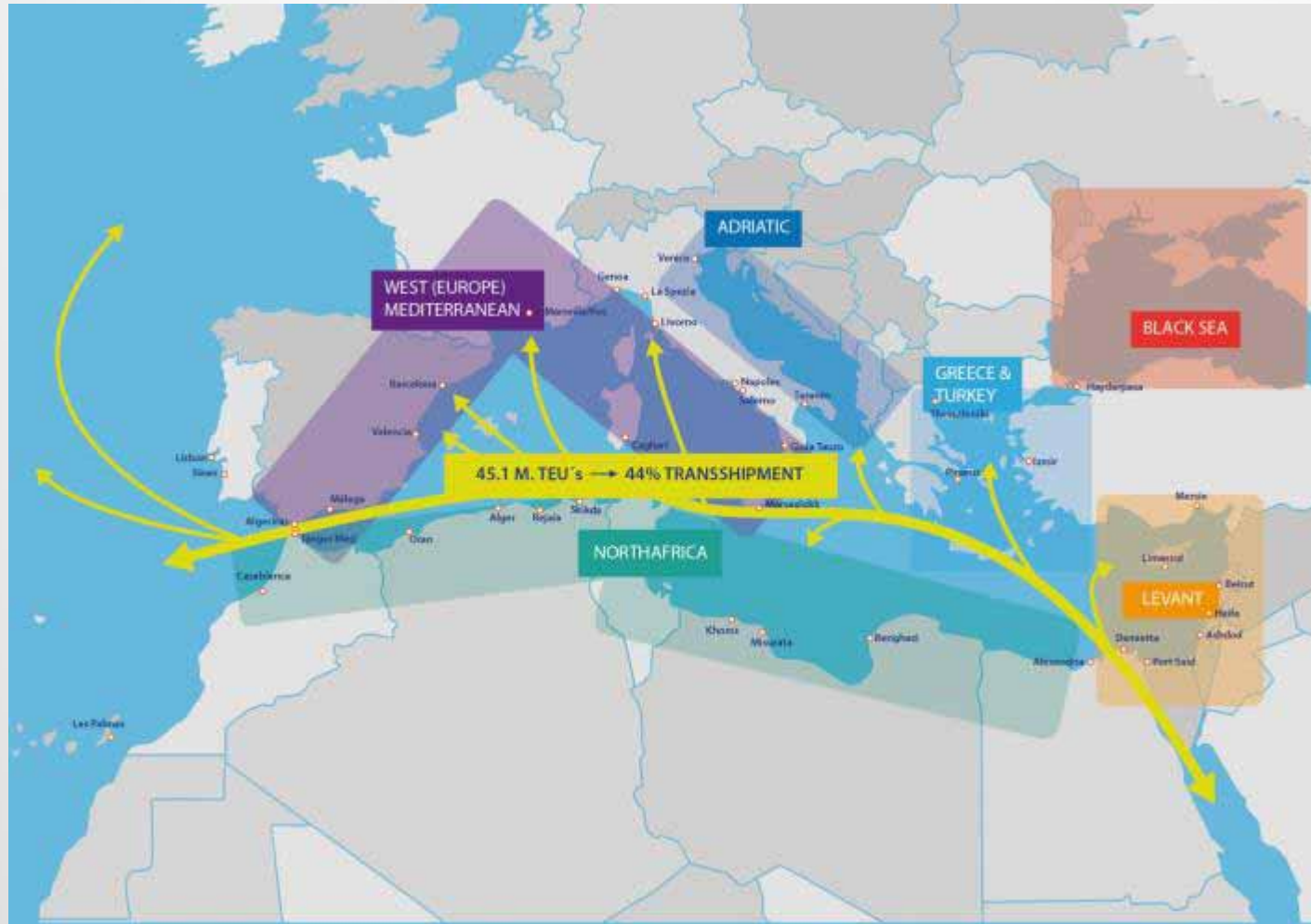


MAIN SEA HUBS WITHIN EAST-WEST TRAFFIC FLOWS



PORT CAPACITY IN THE MEDITERRANEAN CONTAINERPORT MARKET

KEY TRENDS OF THE CONTAINER INDUSTRY



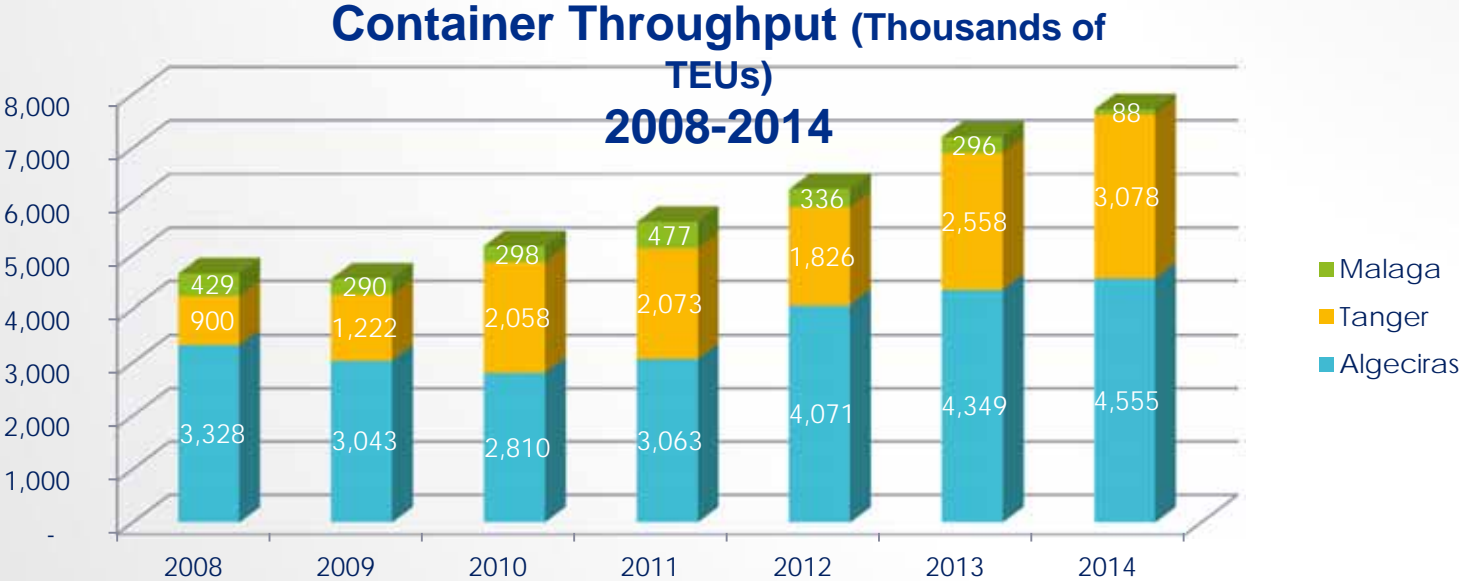
THE STRAIT OF GIBRALTAR: A PORT & LOGISTICS GLOBAL HUB



- ▶ 60 % of the sea container trade is concentrated on 20 main routes
- ▶ 9 of these routes pass through the Strait of Gibraltar

2008-2014 THROUGHPUT EVOLUTION IN THE STRAIT

KEY TRENDS OF THE CONTAINER INDUSTRY

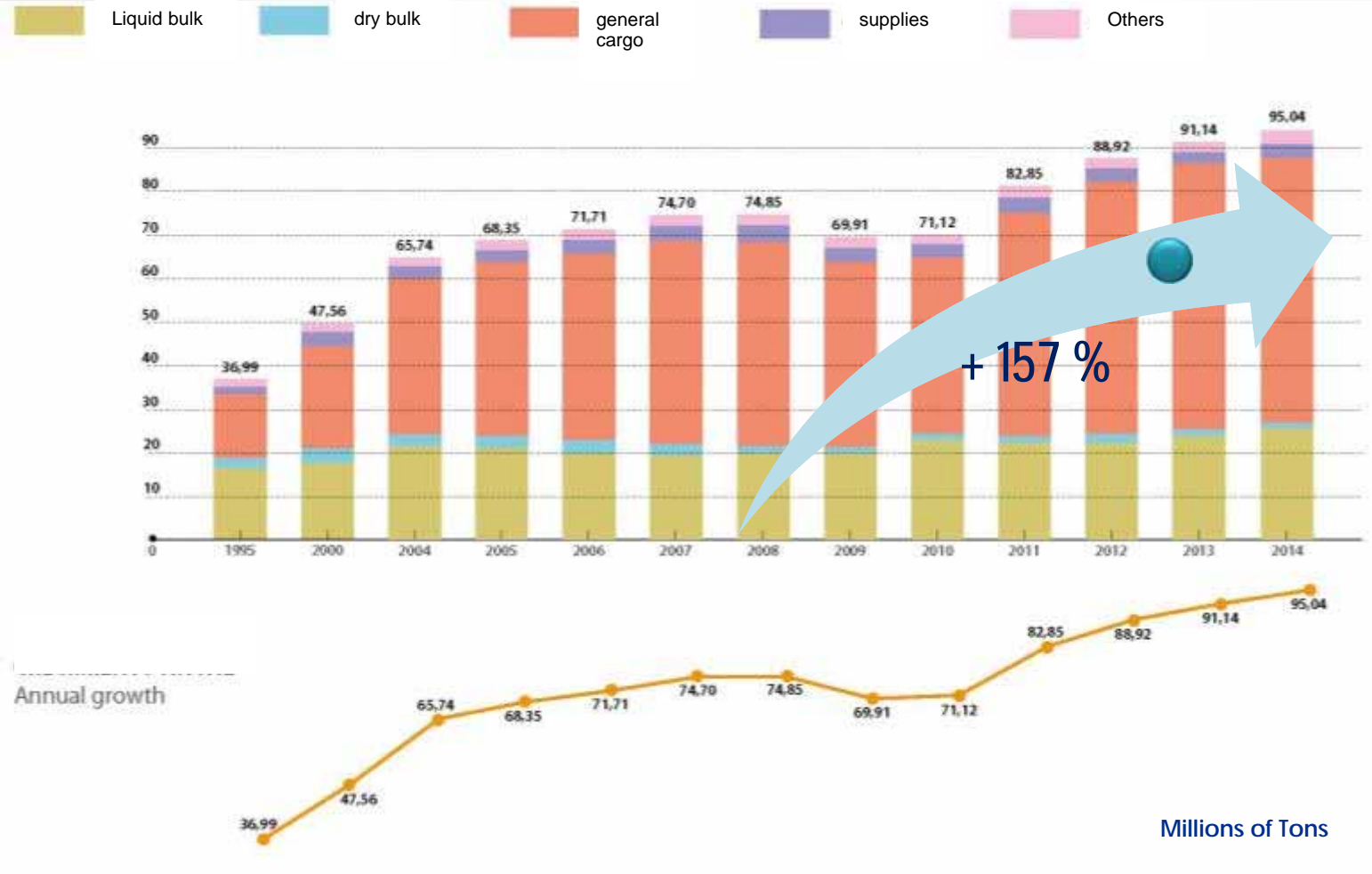


Container activity annual growth rate 2008-2014							
	2008	2009	2010	2011	2012	2013	2014
World	5.40%	-8.88%	14.8%	7.3%	4.53%	3.56%	5.17%
Strait	17.72%	-2.19%	13.44%	8.63%	11.06%	15.56%	7.18%

► Container activity in the Strait has grown by an average of 10.2 % during the 7 last years, compared to an annual growth rate of 4.55 %.

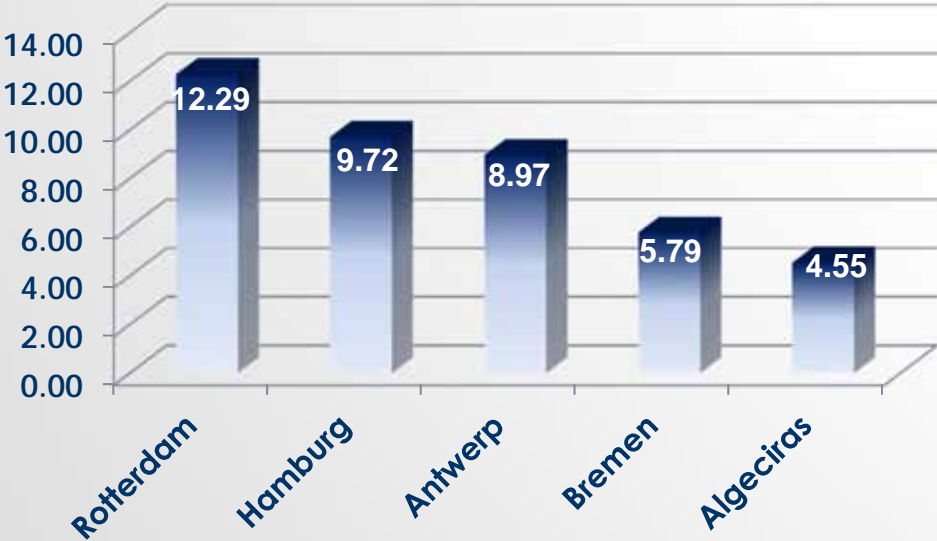
PORT OF ALGECIRAS BAY

1995-2014 HISTORICAL THROUGHPUT DEVELOPMENT



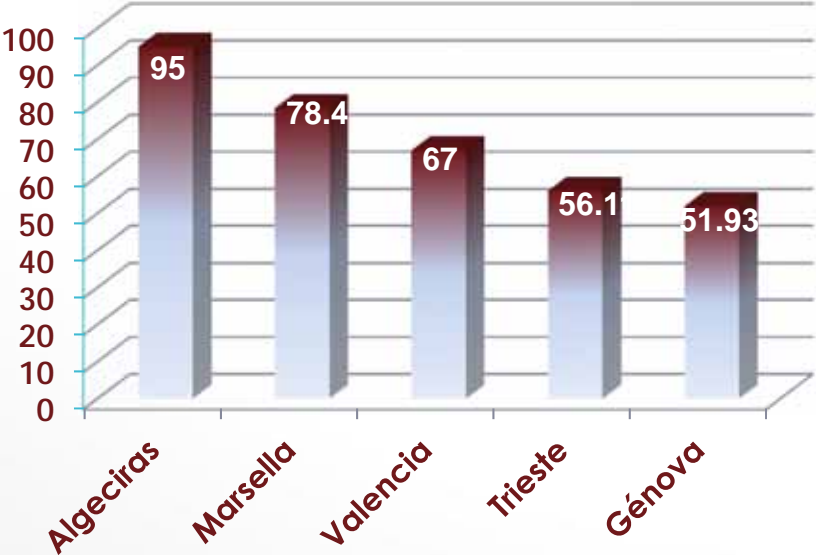
EURO/MED PORT RANKINGS

2014 TOP 5 EUROPEAN CONTAINER PORTS



Millions of TEUs

2014 TOP 5 MEDITERRANEAN PORTS



Millions of Tons

CONTAINERIZED SEA TRAFFIC

KEY TRENDS OF THE CONTAINER INDUSTRY



MSC Oscar (19,224 TEUs) on her maiden call at APM Terminals Algeciras on the 27th February 2015

CONTAINERIZED SEA TRAFFIC

KEY TRENDS OF THE CONTAINER INDUSTRY

ALBATROSS / AE5 SERVICE



GIGANTISM: CONSEQUENCES FOR PORTS & TERMINALS

KEY TRENDS OF THE CONTAINER INDUSTRY



Algeciras 2014 Project

 **APM TERMINALS ALGECIRAS**

"ALGECIRAS 2014 APMT PROJECT" PORT OF ALGECIRAS BAY



"ALGECIRAS 2014 APMT PROJECT"

PORT OF ALGECIRAS BAY

INFRASTRUCTURE ADJUSTMENT TO SERVE THE NEW MEGA-VESSELS

Draught:
Quay up to
17 m.

Adjusted
fairway

Fitted
fenders

Quay capacity
for cranes
up to
+ 1.800 T.

Terminal
adapted for 8
cranes
working
simultaneous
ly

New crane features

Capacity to
operate up to
a 10 on-deck
high cube
containers & 9
below-deck
containers

Boom reach
of + than 72
m., capable of
handling ships
with a beam
of 25
containers.

With the
highest
productivity &
The most
advanced
safety
systems

NEW CAPACITY: ISLA VERDE EXTERIOR PHASE B

PORT OF ALGECIRAS BAY



NEW CAPACITY: ISLA VERDE EXTERIOR PHASE B PORT OF ALGECIRAS BAY



PORT OF ALGECIRAS BAY

NEW CAPACITY (ISLA VERDE EXTERIOR – MASTER PLAN)



2.475 m

425 m (-17.50)

1.840 m (-18.50)

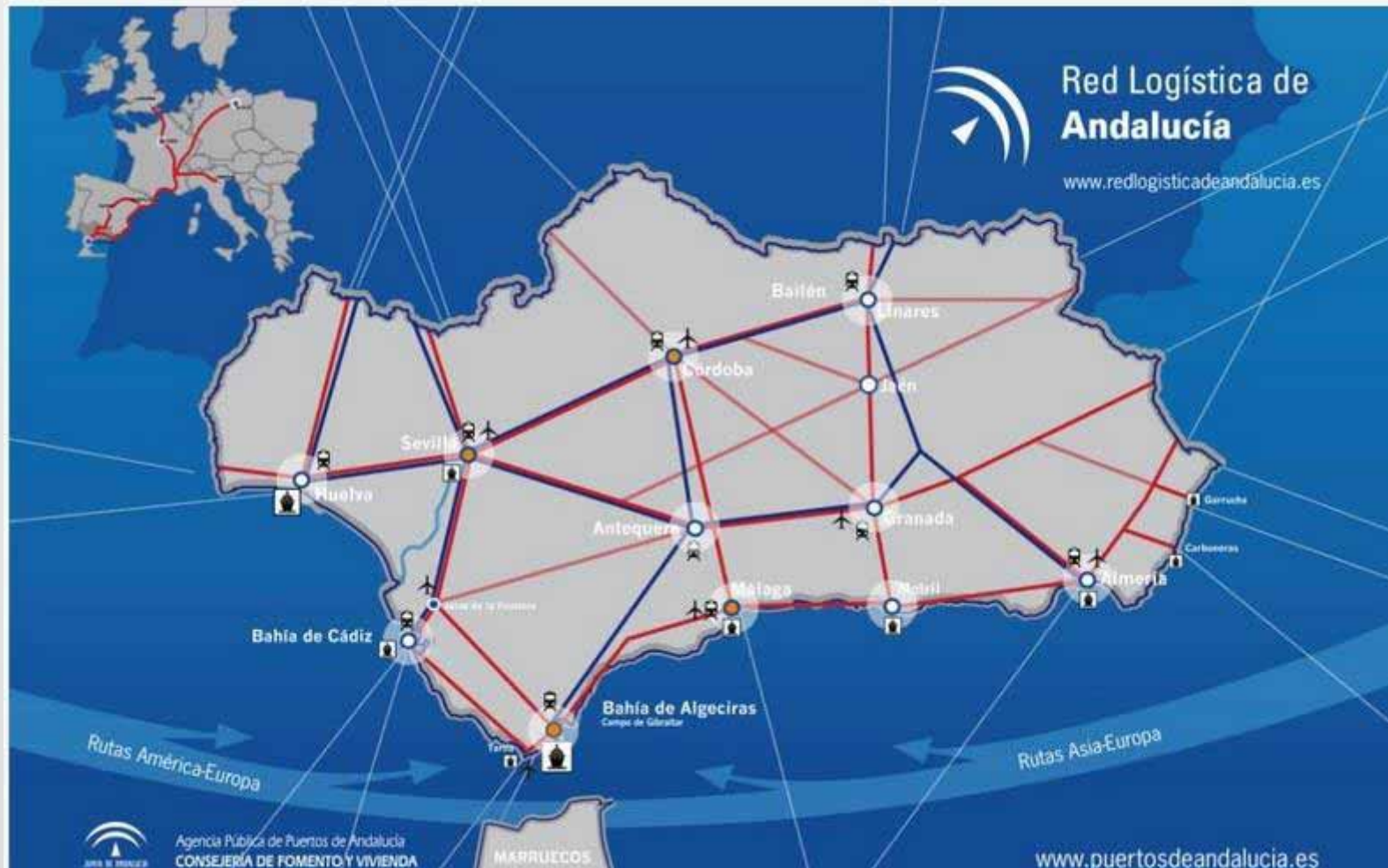
PORT OF ALGECIRAS BAY

NEW CAPACITY (ISLA VERDE EXTERIOR - MASTER PLAN)



ANDALUSIAN LOGISTIC AREA

PORT OF ALGECIRAS BAY



ALGECIRAS BAY LOGISTIC AREA

PORT OF ALGECIRAS BAY

SECTOR 1: **EL FRESNO**

ADMINISTRATIVE &
TRANSPORT SERVICE
CENTER

41 Has



SECTOR 2: **GUADARRANQUE**

INTEGRATED SERVICES AND
INTERNATIONAL TRANSIT
CENTRE
LOGISTICS AND
TRANSFORMATION AREA

125 Has



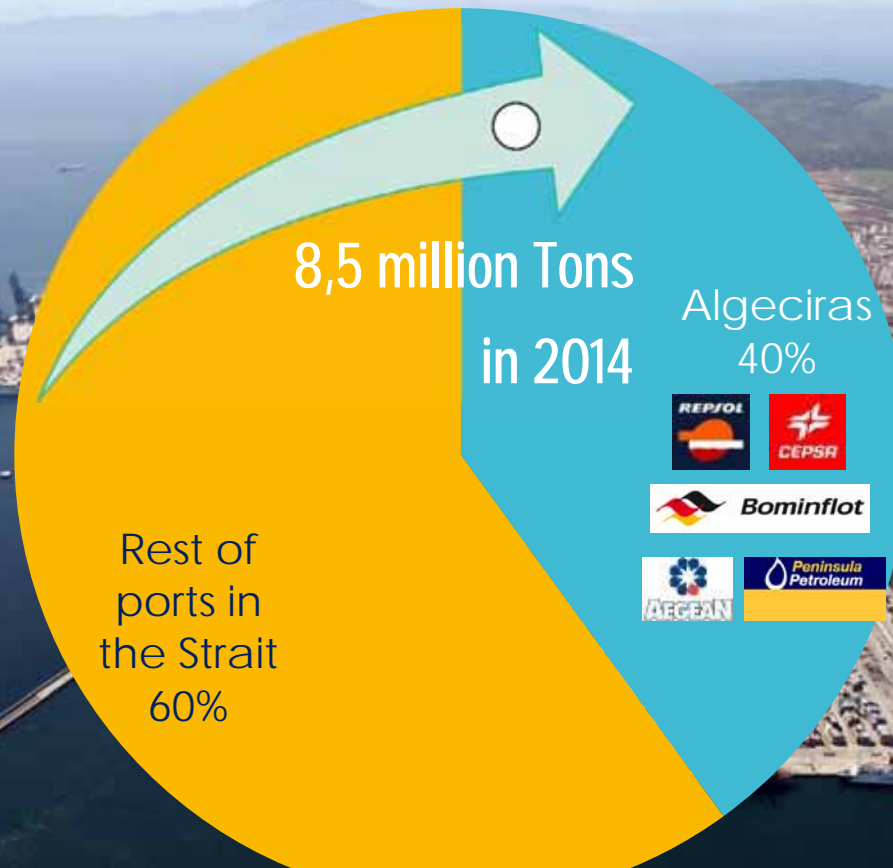
ONE STOP SHOP CONCEPT

PORT OF ALGECIRAS BAY



THE STRAIT: AN 8.5 MM TONS MARKET

Strait Bunkering Market Share





PORT OF ALGECIRAS BAY: DIRECT LINK TO 150 PORTS VIA 25 SHIPPING LINES & 70 SERVICES

www.apba.es



NORTHERN EUROPEAN PORTS vs MED PORTS

KEY TRENDS OF THE CONTAINER INDUSTRY



TEN-T ATLANTIC & MEDITERRANEAN CORRIDORS

TEN-T CORE NETWORK



WE ARE NOT ALONE

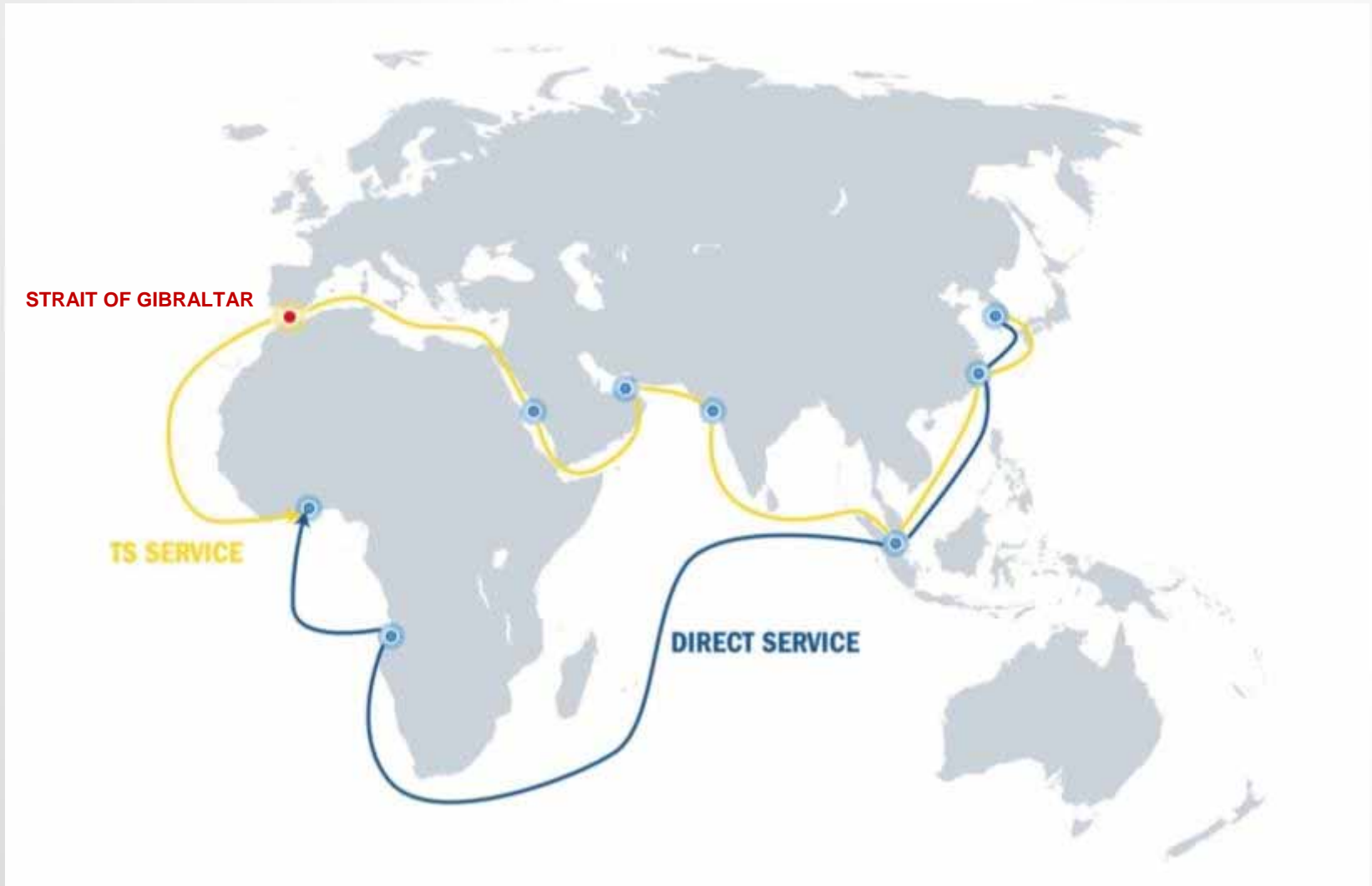
PROSPECTS

Future →

A yellow rectangular sign with a black border, featuring the word "Future" in bold black text and a black arrow pointing to the right. The sign is set against a background of a blue sky with white clouds.

ALTERNATIVE ROUTES VIA CAPE OF GOOD HOPE

KEY TRENDS OF THE CONTAINER INDUSTRY




NEW ARTIC SEA LANE


KEY TRENDS OF THE CONTAINER INDUSTRY

MARITIME ROUTES EXTENSION: THE CLIMATE CHANGE OPENS THE ARTIC PASSAGE

- Ports of scale:

- 1. ULSAN
- 2. VLADIVESTEK
- 3. NAVY PORT
- 4. MURMANSK
- 5. ROTTERDAM

- Artic Route: 16.000 km 

- South Route: 23.000 km 



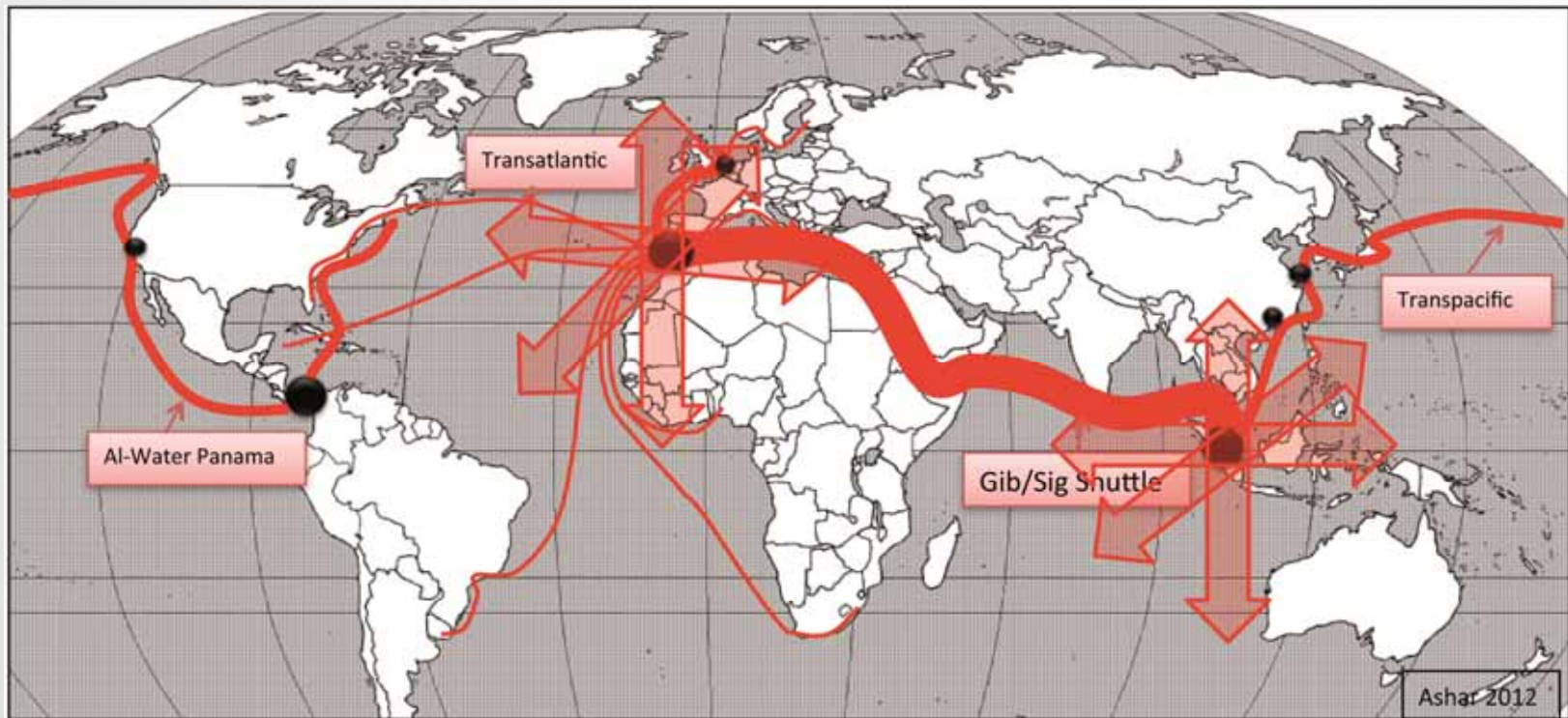
OVERSEA CONNECTIVITY IN 2020

NEW PATTERNS OF CONNECTIVITY



"50% of the World container trade has its origin/destination in Far East ports"

GIB/SIG. SHUTTLE SERVICE NEW PATTERNS OF CONNECTIVITY



Source: Prof. Asaf Ashar

Contact details:

G. Landaluce

Email: glandaluce@apba.es

Merci de votre attention
Thank you for your attention



3rd MED PORTS
2015

