

7th Mediterranean Ports & Shipping 2019



Autoridad Portuaria de Valencia

**Facilitating economic growth through port
reliability and performance**

Casablanca, 27th of June 2019

The Port Authority of Valencia and the Spanish Port System



The Port Authority of Valencia and the Spanish Port System



The Port Authority of Valencia manages three ports

SAGUNTO: 5.70 million Tons
52,401 TEUs
271,155 Vehicles

VALENCIA: 67.19 million Tons
4.77 million TEUs
1,029,263 Passengers
616,960 Regular Lines Passengers
412,328 Cruise Passengers
523,797 Vehicles

GANDÍA: 0.34 million Tons
52,890 Regular Lines Passengers

VALENCIAPORT: 73.25 million Tons
4.83 million TEUs



Valenciaport in the Ranking of World Container Port

Top **WORLD** Container Port
2017

1	Shanghai	40.23
2	Singapore	33.67
3	Shenzhen	25.21
4	Ningbo	24.61
5	Hong Kong	20.76
6	Busan	20.47
7	Guangzhou	20.37
8	Qingdao	18.30
9	Los Angeles/Long Beach	16.89
10	Dubai	15.37
29	Valencia	4.83

Top **EUROPEAN** Container Port
2017

1	Rotterdam	13.73
2	Antwerp	10.45
3	Hamburg	8.86
4	Bremerhaven	5.51
5	Valencia	4.83
6	Algeciras	4.39
7	Piraeus	4.15
8	Felixtowe	4.05
9	Marsaxlokk	3.15
10	Barcelona	3.01

Top **SPANISH** Container Port
2018 *

1	Valencia	5.18
2	Algeciras	4.77
3	Barcelona	3.38
4	Las Palmas	1.13
5	Bilbao	0.65
6	Sta.Cruz Tenerife	0.52
7	Castellón	0.23
8	Vigo	0.21
9	Alicante	0.16
10	Sevilla	0.13

Figures in million TEU

Source: ALPHALINER 21.03.2018 to 27.03.2018

* Spanish State-owned Ports Body 2018 preliminary figures

Top WORLD Container Port 2018

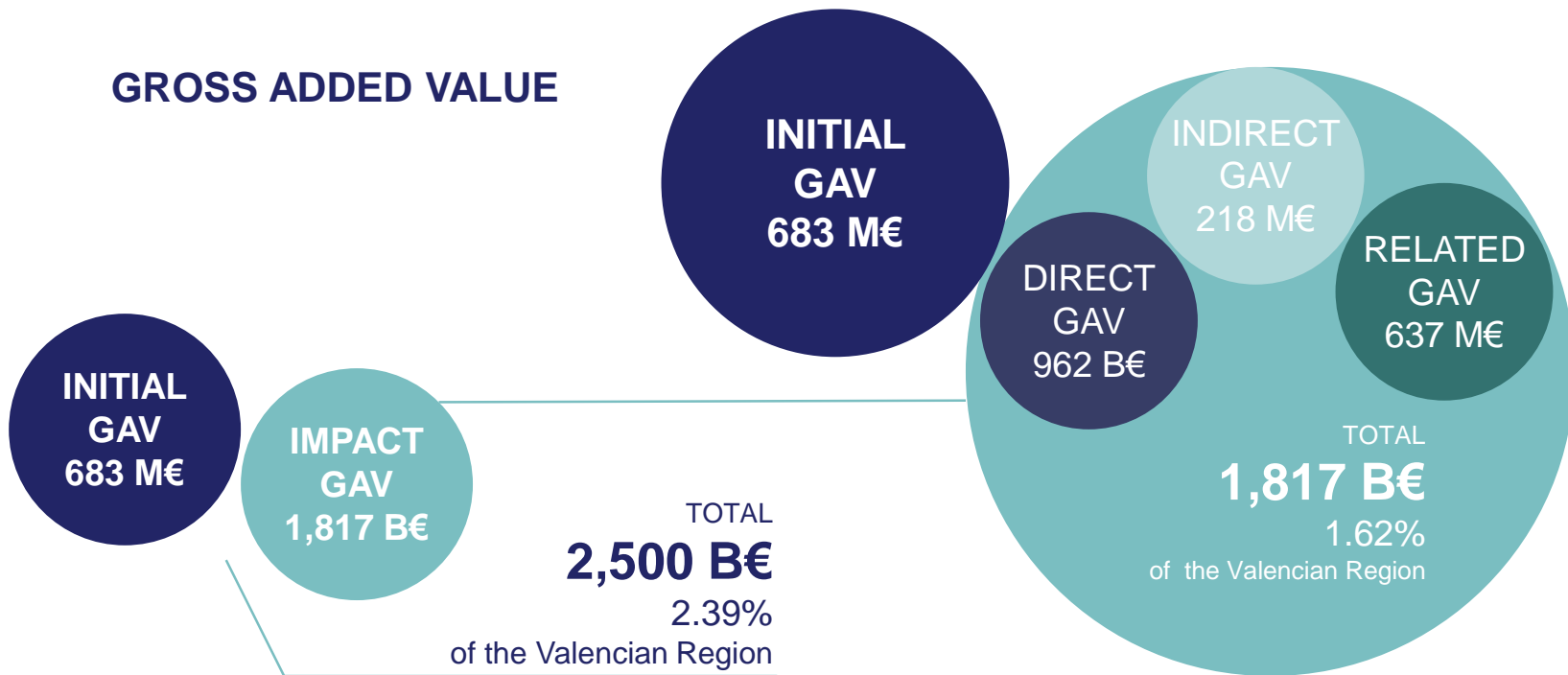
Top 30 Ports									
Rank	Port	FY 2018 TEU	Growth % 18/17	3Q 2018 TEU	Growth % 3Q 18 vs 17	1H 2018 TEU	Growth % 1H 18 vs 17	1Q 2018 TEU	Growth % 1Q18 vs 17
1 (1)	Shanghai	42,009,800	4.4%	31,355,800	4.9%	20,506,800	4.6%	9,739,800	4.1%
2 (2)	Singapore	36,599,277	8.7%	27,300,159	10.2%	18,021,268	11.6%	8,864,624	16.5%
3 (4)	Ningbo-Zhoushan			20,135,400	7.3%	13,311,800	7.5%	6,493,500	10.4%
4 (3)	Shenzhen	25,735,000	2.1%	19,116,100	0.9%	12,075,500	1.9%	5,971,100	6.4%
5 (6)	Busan	21,591,915	5.4%	16,080,444	4.7%	10,633,043	4.3%	5,120,360	4.6%
6 (7)	Guangzhou			15,955,700	7.5%	10,543,400	8.4%	4,933,500	9.7%
7 (5)	Hong Kong	19,641,000	-5.4%	14,663,000	-5.7%	9,868,000	-3.7%	4,888,000	0.2%
8 (8)	Qingdao			14,346,000	4.5%	9,381,200	3.2%	4,545,600	0.7%
9 (9)	LA/LB			12,792,740	2.7%	8,262,066	4.1%	4,006,532	4.7%
10 (11)	Tianjin			12,115,300	5.7%	7,807,600	5.2%	3,601,400	7.5%
11 (10)	Dubai			11,339,000	-2.1%	7,738,000	0.2%	3,826,000	3.0%
12 (12)	Rotterdam			10,780,204	5.7%	7,077,406	6.2%	3,470,596	6.1%
13 (13)	Port Kelang			9,026,072	-0.2%	5,874,912	-5.7%	2,933,038	-9.1%
14 (14)	Antwerp			8,333,523	6.9%	5,567,905	8.3%	2,744,226	10.7%
15 (15)	Xiamen			8,008,400	5.2%	5,165,600	7.6%	2,491,700	11.6%
16 (16)	Kaohsiung			7,777,959	1.3%	5,183,803	0.1%	2,561,424	-2.1%
17 (17)	Dalian			7,639,900	0.3%	4,815,400	0.4%	2,214,300	0.6%
18 (18)	Hamburg			6,620,000	-2.4%	4,355,000	-2.7%	2,160,137	-2.8%
19 (19)	Tanjung Pelepas			6,590,804	5.4%	4,382,002	5.8%	2,183,927	7.4%
20 (20)	Laem Chabang			5,992,107	4.0%	3,946,211	4.9%	1,948,119	5.1%
21 (21)	NY/Ni			5,327,814	6.3%	3,450,469	6.8%	1,680,361	9.6%
22 (23)	Colombo	7,047,486	13.5%	5,223,292	14.9%	3,415,298	15.6%	1,706,359	16.2%
23 (24)	Jakarta			4,933,850	12.7%	3,201,136	10.6%	1,633,683	6.9%
24 (22)	Yingkou			4,775,800	2.8%	3,120,100	1.6%	1,556,700	1.1%
25 (25)	Ho Chi Minh City			4,683,819	6.3%	3,110,070	7.1%	1,473,575	7.5%
26 (26)	Bremerhaven			4,112,158	1.9%	2,721,111	0.7%	1,345,482	-3.2%
27 (28)	Valencia	5,103,761	5.6%	3,795,960	4.5%	2,498,384	6.4%	1,183,187	8.1%
28 (27)	Tokyo			3,757,000 ^{***}	0.7%	2,502,781	2.0%	1,234,216	4.7%
29 (30)	Nhava Sheva	5,051,805	7.2%	3,759,573	6.8%	2,482,050	6.9%	1,241,023	11.0%
30 (29)	Manila			3,748,149	6.0%	2,460,164	13.1%	1,197,367	7.0%

Rankings based on 1-3Q 2018 throughput (2017 ranking in brackets) including transshipment, empty containers and reflows.

Figures in million TEU

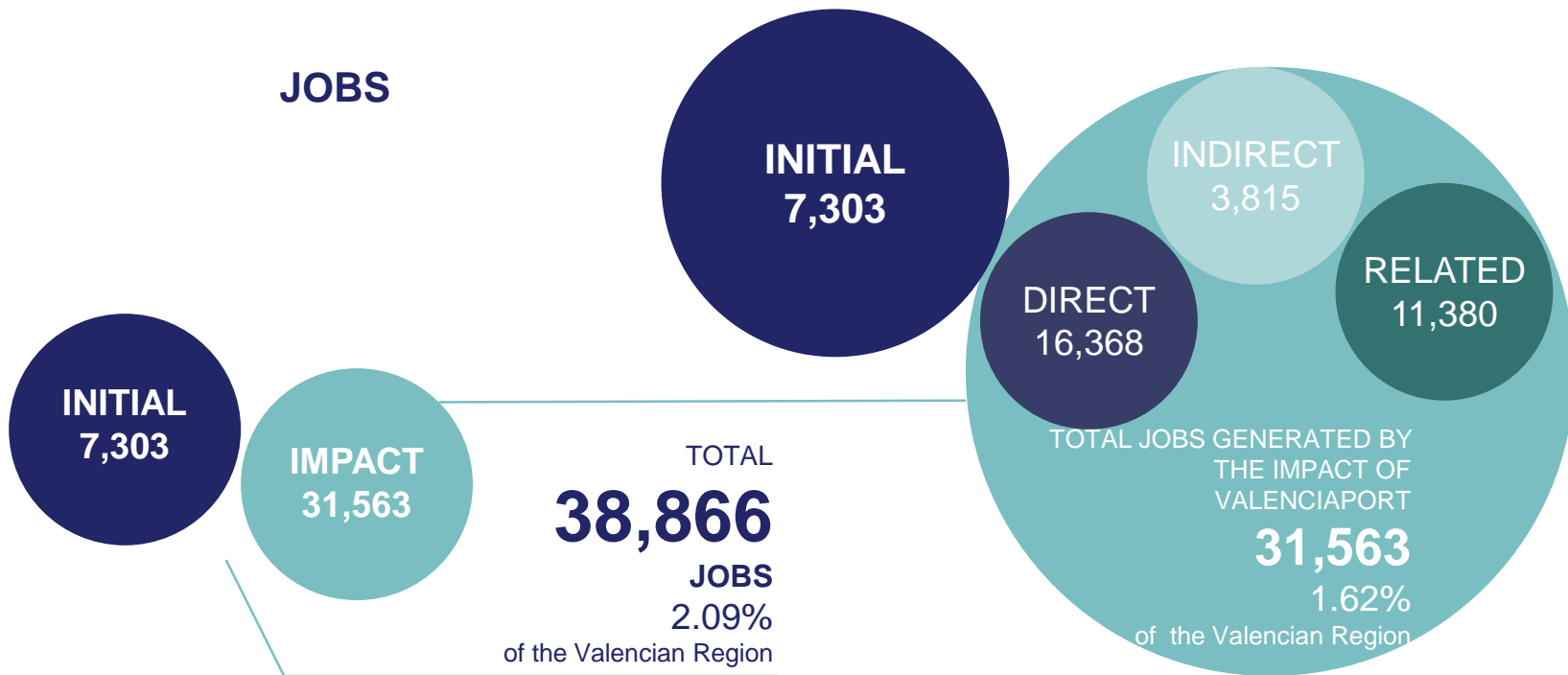
Valenciaport Economic Impact

GROSS ADDED VALUE



Valenciaport Economic Impact

JOBS



The most important Terminals in the Port of Valencia

- 1 Container CSP Valencia Terminal
- 2 Container MSCTV
- 3 Container APM Terminal
- 4 Ro-Ro / Vehicles
- 5 Ford Terminal
- 6 Liquid bulk (Petrol products)
- 7 Liquid bulk (Asphalt, Oils, Molasses)
- 8 Solid bulk (Cereals)
- 9 Solid bulk (Cement)
- 10 Passengers and Cruises Terminal (Trasmediterránea)
- 11 Passengers Terminal (Balearia)
- 12 New container terminal



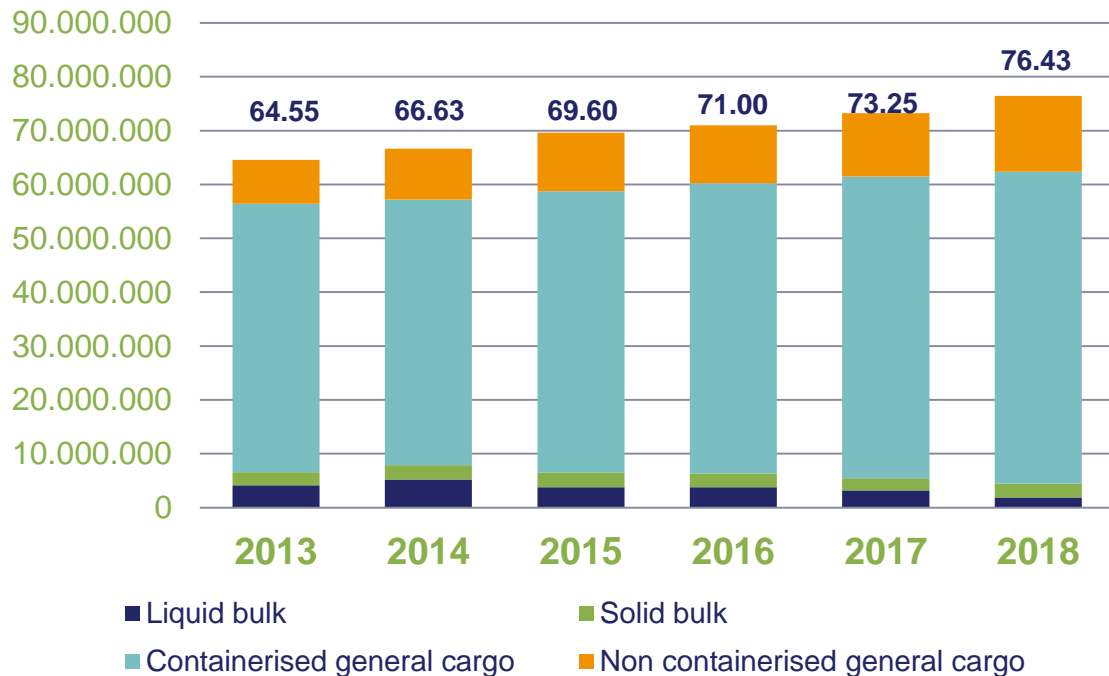
The most important Terminals in the Port of Sagunto

- 1 Vehicle Terminal
- 1b TOYOTA Vehicle Logistics Centre
- 1c Other spaces for vehicles
- 2 Regasification Plant
- 3 Multipurpose Terminal
- 4 Multipurpose Terminal
- 5 Multipurpose Terminal
- 6 Multipurpose Terminal
- 7 Fertilizers



PAV Traffic throughput

Tons/ type of presentation

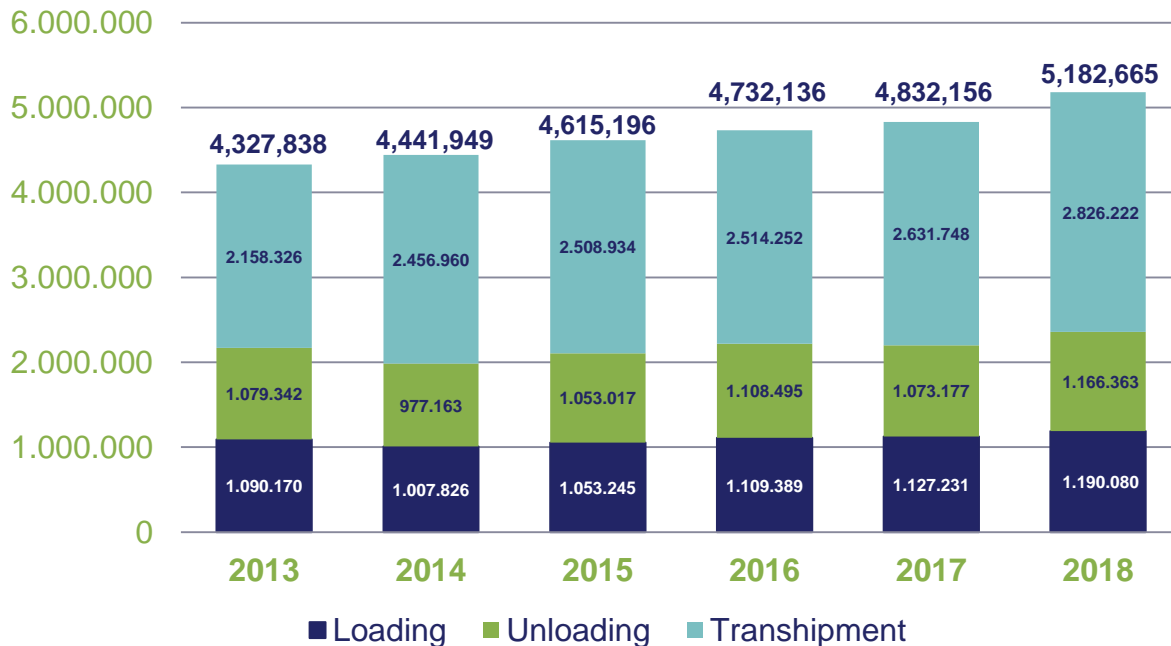


The container
our main traffic
75.74%



PAV Traffic throughput

TEUs loading, unloading and transhipment



Gate/transhipment port
Mixed hub concept



The Port of Valencia: a key factor for Spain competitiveness

40% of the containers that serve the Spanish foreign trade pass through the Port of Valencia.

Port of Valencia-Port of Madrid: a share of more than **60%** of the containers in the Madrid area.

- Helping companies to trade abroad and be more competitive.
- Ensuring connectivity to the world's markets.



Direct area of influence

Within a **350 Km** radius from Valencia:
55% of Spain's GDP
51% of the country's working population
42% of the territory

The Port Authority of Valencia competitive offer: Gate Port at the service of import/export trade

BILBAO

ZARAGOZA

MADRID

VALENCIA

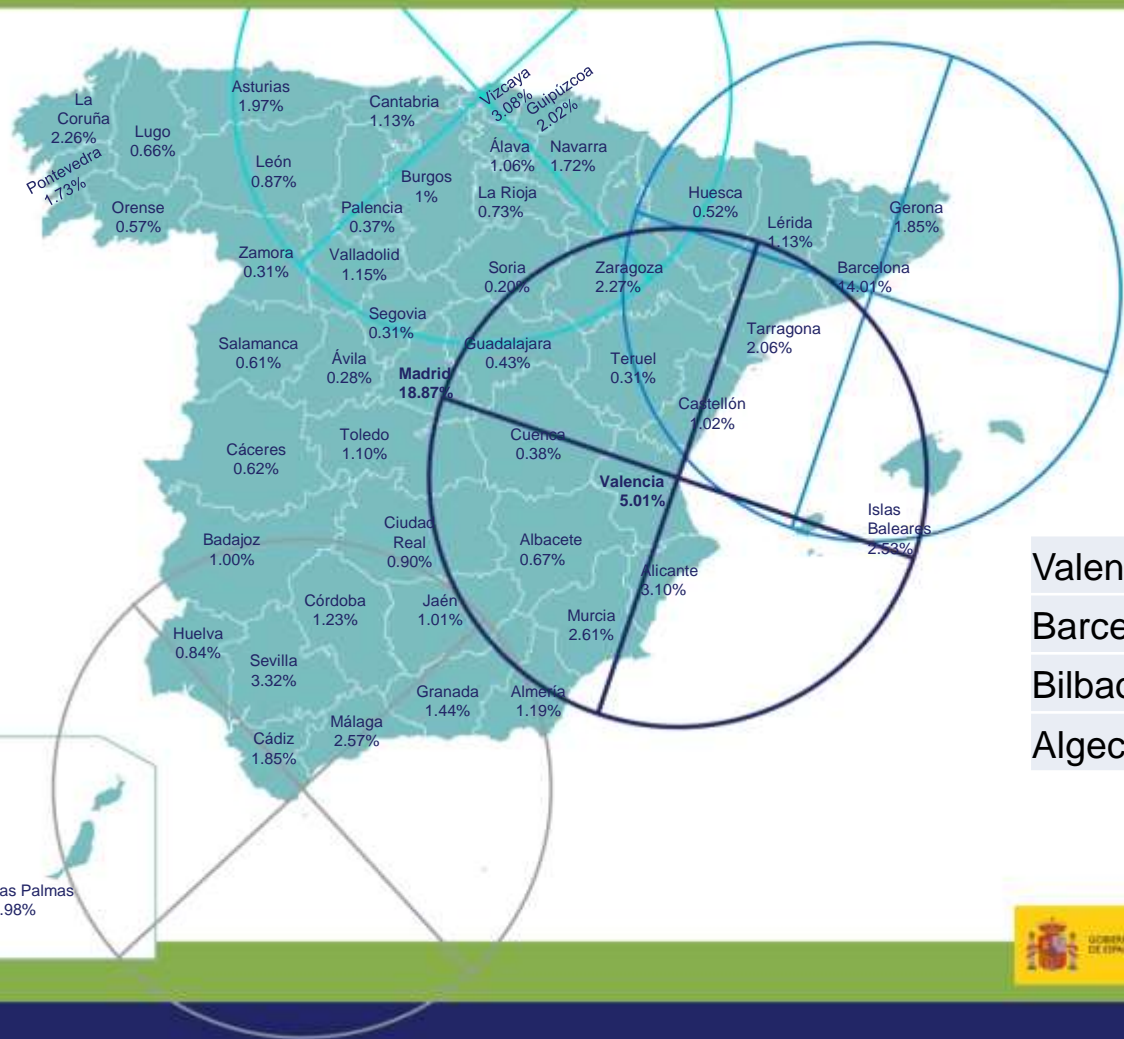
MURCIA

Extended area of influence

A **2000 Km** radius from Valencia comprises Spain, Portugal, France, Italy, Morocco, Algeria, and Tunisia

As a hub for the Western Mediterranean, Valenciaport efficiently distributes goods over a radius of 2,000 km, both in Southern EU countries and in North Africa

% of GDP



Valencia	55,5
Barcelona	25,9
Bilbao	39,1
Algeciras	15,6



IMPORT / EXPORT



Valencia	60,4
Barcelona	33,4
Bilbao	37,9
Algeciras	11,4



The Port Authority of Valencia competitive offer

Gate Port at the service of import/export trade



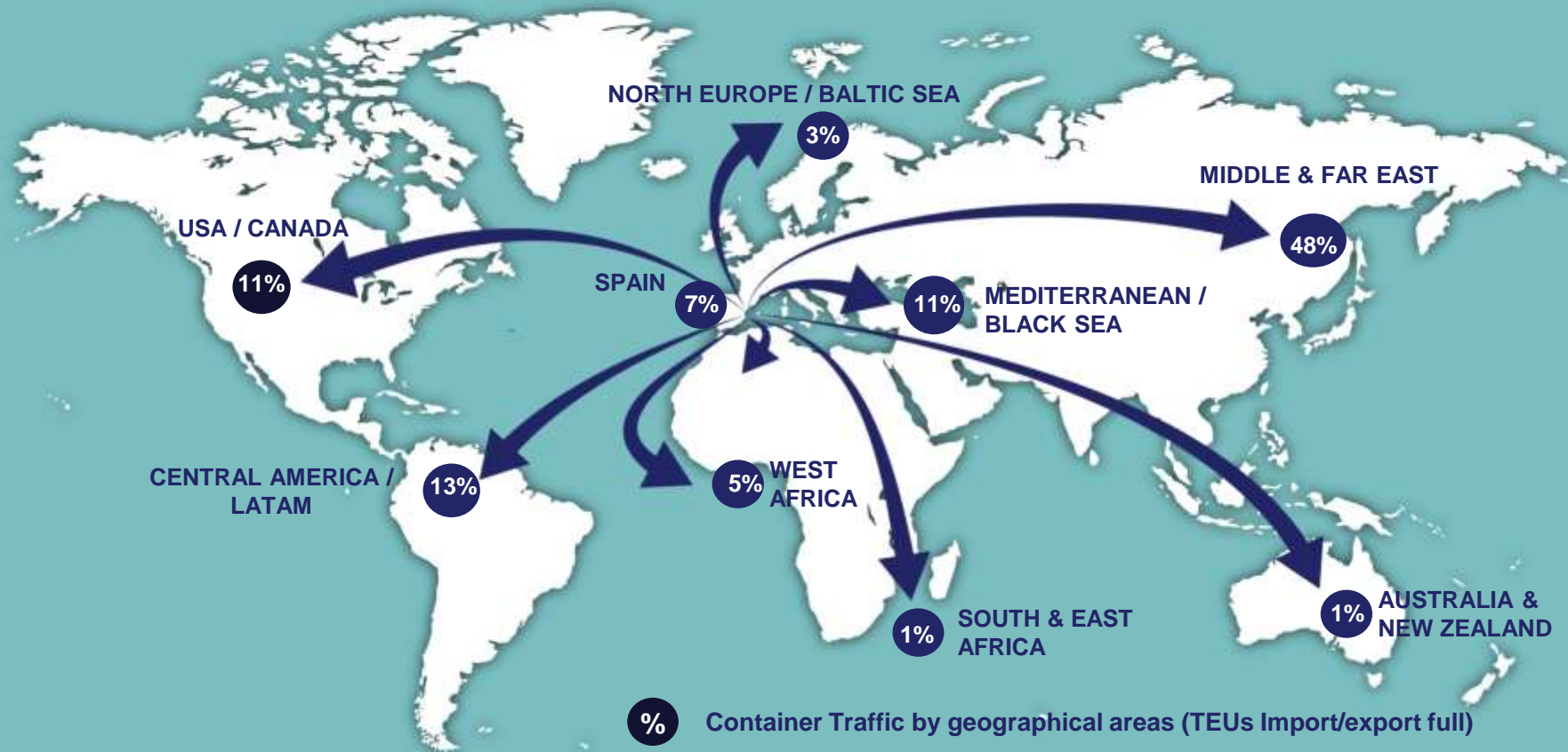
Hinterland: Madrid,
Central Spain,
Aragon, Andalusia,
Extremadura,
Castile La Mancha
y Castile Leon and
Murcia



Distance from main route of interoceanic east-west routes (estimates in hours).
 An estimated speed of twenty knots
 Source: Voyage Planner application.

The best connectivity of the Spanish Port System

The Port of Valencia is connected directly to over 1,000 ports around the world



The Port Authority of Valencia competitive offer: Hub – Gate Port for Transshipment and International Trade



Feeder services to the
rest of Mediterranean,
North and West of Africa

The Project: New Valencia Container Terminal

Main Technical characteristics:

- **Quay length:** 1,970 m.
- **Quay draft:** 19.2 m.
- **Dock draft:** 20.0 m.
- **Entrance Channel draft:** 22.5 m.
- **Width of Terminal:** up to 700 m.
- **Area of Terminal:** up to 140 Ha. aprox.
- **Capacity:** 5 Million Teu aprox.
- **Rail Terminal:** to attend minimum 750 m. long trains
- **Phased development:** as required by Terminal Operator
- **Concession term:**
 - 35 years, option to extend to 50 years, for partial development proposals
 - 50 years, for full development proposals



GREEN & GROWTH

Market - oriented
Services efficiency
Logistic & intermodal integration
Economic, social & environmental sustainability



valenciaport pcs.net
Port Community System



Smart & Reliable Port

Committed with Quality

The **Quality Mark** is an innovative quality seal and one of the pillars on which Valenciaport and the port community companies base their commitment to providing their customers with the best quality. This gives customers an efficient instrument to guarantee the quality of their commercial transactions.



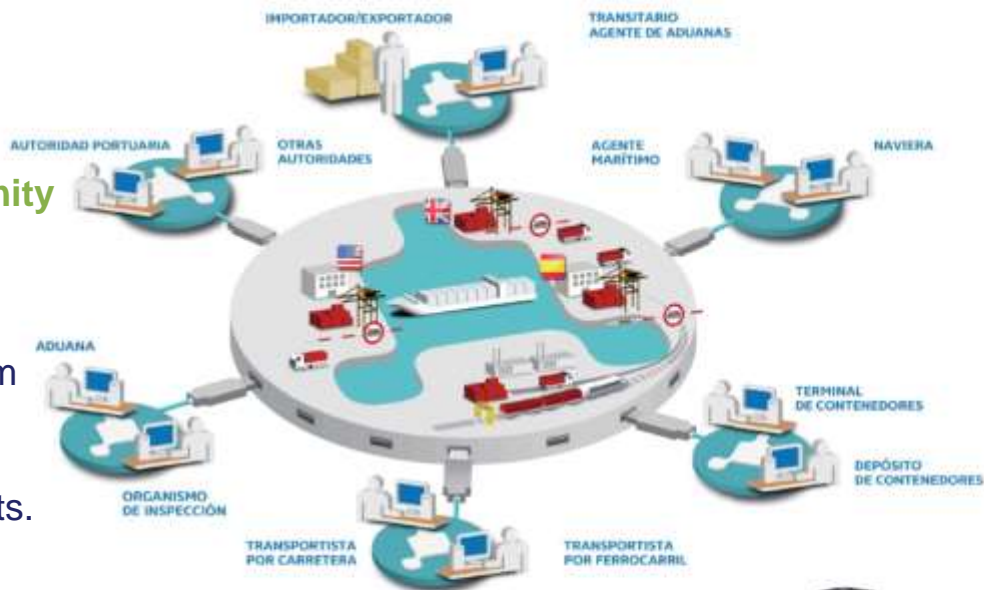
Technological Innovation to improve the services of our clients

valenciaport PCS PORT COMMUNITY SYSTEM

ValenciaportPCS is the **Port Community System of Valenciaport**.

It belongs to the Port Authority of Valencia. It is the e-commerce platform that is used by the Port Community to exchange data and administrative, commercial and operational documents.

On-stop-point for more than 700 companies





Technological Innovation
to improve the services of our clients

valenciaport  **PCS**
PORT COMMUNITY SYSTEM

Client oriented: App for road transport

Intermodality and Railway Corridors



Railway Corridors

Madrid – Center – Portugal
Mediterranean – Atlantic
Mediterranean

PAV Railway investments(2017-21)

53.6 M€ M-AC
31.3 M€ Sagunto P.
67.8 M€ Valencia P.

Traffic (2018)

80 weekly trains
7 Rail Operators

Valenciaport is connected with the National Road Network
and the National Rail Network.

Hinterland development



Source: Adif



NRTZ

- Valenciaport is one of the shareholders in NRTZ (Zaragoza) and Puerto Seco (Madrid).
- We are looking for new locations in order to attract more cargo from the hinterland.



Logistics Activities Area (ZAL) and value added services for goods

The Port of Valencia has Logistics Activities Area a which complements the range of services it offers.

Over 300,000 m² devoted exclusively to logistics, strategically located next to the Port of Valencia and the main transport nodes.



The ZAL is an interesting proposition for companies operating in shipping-related logistics and for those planning on setting up strategic distribution centers with an international outreach



THANKS

We want to grow with you

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