The Port of Antwerp

A general introduction

Location
Development of the port

- River Scheldt
- Road infrastructure
- Border
- Port area
- Before the 19th century: Old river port
- 1811 – 1930: Renovation of old port and expansion to the north as far as the Van Cauwelaert lock
- 1951 – 1965: Marshall Plan, construction of the petroleum port and expansion of docks as far as the Dutch border
- 1970 – 2000: expansions until the turn of the century
- 2000 - ...: Recent developments
The Port of Antwerp today

- Total area: 13,057 ha
- Quay length: 151 km
- Railway: 1,061 km
- Roads: 409 km
- Covered storage space: 553 ha

Organisation in the Port of Antwerp

The Antwerp Port Authority is an autonomous body, managing

☑ Infrastructure:
  - docks
  - bridges
  - locks
  - quays
  - land

☑ Vessel traffic in the port
☑ Marketing & branding activities
Organisation in the Port of Antwerp

The private companies manage superstructure and operate the terminals:
- terminals
- cranes
- equipment
- warehouses

Employment

149,326 jobs (full time equivalents, in 2009)

62,577 direct
86,749 indirect

Economic engine

17.7 billion euros of added value (in 2009)

= 9.1% of Flemish GDP
= 5.2% of Belgian GDP


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Multifunctional port
Maritime cargo transport 2011

2011: 187 million tonnes
Ranking of the world ports

<table>
<thead>
<tr>
<th>Port</th>
<th>International maritime cargo (millions of tonnes 2010)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rotterdam</td>
<td>400</td>
</tr>
<tr>
<td>Singapore</td>
<td>300</td>
</tr>
<tr>
<td>Ningbo Zhoushan</td>
<td>200</td>
</tr>
<tr>
<td>Shanghai</td>
<td>150</td>
</tr>
<tr>
<td>Qingdao</td>
<td>120</td>
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<tr>
<td>Tianjin</td>
<td>110</td>
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<tr>
<td>Rizhao</td>
<td>100</td>
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<tr>
<td>Yingkou</td>
<td>90</td>
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<tr>
<td>Tangshan</td>
<td>80</td>
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<tr>
<td>Yantai</td>
<td>70</td>
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<tr>
<td>Guangzhou</td>
<td>60</td>
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<tr>
<td>Antwerp</td>
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<tr>
<td>Port Hedland</td>
<td>40</td>
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<tr>
<td>Shenzhen</td>
<td>30</td>
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<tr>
<td>Dampier</td>
<td>20</td>
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Full container terminals
Development and organisation
World port
Cargo
Success factors
A port with a future

Maritime cargo transport 2011
Containers 2011

Total volume: 8.7 million TEU

Containers capacity

- Total capacity/year: 14 million TEU
- Accessible for world’s largest container vessels of 15,500 TEU
- State-of-the-art automated installations
- Highest productivity in Europe: up to 40 moves/hour/crane
Ranking of the world container ports
2. european container port

Top 20 world container ports (TEU 2010)

- Shanghai
- Singapore
- Hongkong
- Shenzhen
- Busan
- Nagoya
- Guangzhou
- Qingdao
- Dubai
- Rotterdam
- Tianjin
- Kaohsiung
- Port Klang
- Antwerp
- Hamburg
- Los Angeles
- Tanjung Pelepas
- Long Beach
- Abu Dhabi
- New York/New Jersey

Breakbulk in the Port of Antwerp

- Steel & non-ferrous metals
- Fruit
- Rolling stock
- Forest products
- Project cargo
- Coffee
Breakbulk:
European market shares excl. rolling stock 2010

<table>
<thead>
<tr>
<th>City</th>
<th>Market Share</th>
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</thead>
<tbody>
<tr>
<td>Amsterdam</td>
<td></td>
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<tr>
<td>Antwerp</td>
<td></td>
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<tr>
<td>Bremen</td>
<td></td>
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<tr>
<td>Dunkirk</td>
<td></td>
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<tr>
<td>Ghent</td>
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<tr>
<td>Hamburg</td>
<td></td>
</tr>
<tr>
<td>Rotterdam</td>
<td></td>
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<tr>
<td>Zeebrugge</td>
<td></td>
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<tr>
<td>Zeeland Seaports</td>
<td></td>
</tr>
</tbody>
</table>

Source: Port of Antwerp, 2010

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Breakbulk:
289 sailings per month

Source: Port of Antwerp, 2010
Main chemical hubs per continent

- Houston
- Singapore
- Antwerp

Liquid bulk in the Port of Antwerp

- 46 million tonnes (2011)
- Largest chemical and petrochemical cluster in Europe
- Integrated model:
  - refineries
  - steam crackers
  - independent tank storage
  - waste treatment
  - logistics
- Extensive pipeline network
Largest chemical cluster in Europe

1. BASF
2. Air Liquide
3. Solvay
4. BRC (part of Petroplus)
5. Ineos
6. Monsanto
7. Evonik Degussa Antwerp
8. Bayer
9. Lanxess
10. Total (Refinery + Petrochemicals)
11. ExxonMobil (Refinery + Petrochemicals)
12. Fina Antwerp Olefins (JV Total and Exxon Mobil)
13. Borealis
14. Dow
15. Praxair

Limited list

7 out of the 10 main international chemical companies have a production site in Antwerp

Dry bulk

- 19 million tonnes (2011)
- Coal, ore, fertilisers, etc.
- Mainly imports from global origin: South Africa, Russia, Algeria, North America, etc.
Success factors

1. Widely connected to the worldwide foreland
2. Location in the heart of Europe
3. Appropriate storage solutions for each product
4. Excellent hinterland connections
5. Collaboration with hinterland hubs
1. Widely connected to the worldwide foreland

- Direct services to over 500 ports
- 300 of which are called at weekly
- The Antwerp arrival and departure list: www.portofantwerp.com

![Shortsea regional container traffic 2011](image)

Port of Antwerp International

Subsidiary of the Antwerp Port Authority

Port of Antwerp wants to create stronger commercial links with maritime regions in growth countries worldwide.

Overseas ports want to improve their management and infrastructure or increase their efficiency and throughput.

Overseas partners can benefit from the know-how and expertise of the Port of Antwerp.

For more information: www.portofantwerp/pai - pai@portofantwerp.com - tel. +32 3 229 73 73
2. Location in the heart of Europe

- Antwerp is located in the heart of Europe
- The "banana" contains the main European centres of production and consumption
- 60% of the European purchasing power is within 500 km from Antwerp

Source: Cushman & Wakefield

3. Appropriate storage & distribution solutions for each product

- 5.53 million m² covered storage space
- Cool and cold storage, hazardous goods warehouses etc.
- Added value services:
  - weighing
  - packing
  - quality control
  - labelling
  - stock management etc.
4. Excellent hinterland connections

Road transport

- The port is surrounded by highways
- Direct connection to surrounding countries
- Merely 40 km from Brussels, the European capital

4. Excellent hinterland connections

Daily barge connections with EU hinterland

- Connected to the European waterway network by Scheldt-Rhine canal and Albert canal
- Over 200 container shuttles per week to 67 destinations in Europe
- 85 barge operators offer regular, even daily, services between Antwerp and the European hinterland
- All container barge sailings can be consulted on Inland Waterways Departure list: www.portofantwerp.com
Inland navigation in the Port of Antwerp: Evolution

=> 1995 – 2011: strong growth of inland navigation
   overall: +59% - containers: +153%

4. Excellent hinterland connections
   Rail transport
   - Antwerp is located on a junction of international lines
   - 1,061 km of railway tracks in the port
   - Each terminal is connected to the railway network
   - 250 loaded cargo trains daily
   - 24 million tons transported per rail in 2009 (net)
4. Excellent hinterland connections
Rail: container shuttle services

- More than 200 regular shuttle services from Antwerp to 70 destinations in 19 countries
- Several new connections in 2010/2011
- Container rail services: www.portofantwerp.com

5. Focus areas Europe

Tier 1: Consolidation of volumes via transferia:
- WCT Meerhout
- Beverdonk Container Terminal
- TCT Willebroek

Tier 2: Tri-modal hinterland hubs
- South West: LAR Kortrijk / Moeskroen
- South East: Athus / Liège

Tier 3: Hinterland corridors (Rail/Barge)
- South Lanes:
  - France/Spain: Lille/Paris, Hendaye, Lyon, Marseille, Perpignan, Irun, Barcelona
  - Italy/Switzerland: Basel, Milan East & West
- Eastern Lanes:
  - Rhine corridor
  - Germany/Austria/Hungary
  - Czech Rep./Poland

Customer’s benefit: rapid transport flows through efficient trimodal connections
Development and organisation
World port
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Ambitious long term investment plan in infrastructure

1.6 billion euro in 15 years (up to 2025)

Projects completed:
Deepening of the river

Shorter term projects include:
• Rail tunnel connecting left and right bank
• Construction of a second lock on the left bank
• Dock renovation and investment
• Purchase of a new suction dredging barge, new tugboats, dumb barges and a pusher barge

Long term project:
Development area “Saeftinghe” of ca. 1000 ha
Recent and future investments

1. Deepening of the river Scheldt
2. Second access to the Left Bank
3. Development zone ‘Saeltinghe’
4. Road infrastructure
5. Rail infrastructure
6. Barge transport

Thank you for your attention!

Questions?

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Zaha Hadid Architects