Container Terminal Management

The credit crisis created turmoil in the global container transportation industry. In all sectors – shipping lines, ports, terminals, hinterland transportation and related sectors – companies have suffered substantial volume and revenue losses, resulting in profitability coming under pressure. Unconventional measures had to be taken to survive the turmoil.

This study presents new forecasts, trends and scenarios from a post-crisis perspective. In addition, the lessons learnt from the crisis are evaluated and analysed in order to allow better preparation for future uncertainties. Key future changes in container terminal management are assessed.

The study covers the following specific issues:

- Detailed forecasts of container port demand;
- Assessment of the future health of the container shipping industry;
- Current and future vessel sizes by trade and region;
- The implications of the New Panamax vessel dimensions;
- The impact of the forecasts on container terminals;
- Overview of the most compelling post-crisis trends;
- Assessment of the long-term impact of the crisis;
- Ways to be better prepared for the future;
- Measures to build more robustness in revenue streams;
- Ways of making the costs of container terminals more flexible;
- How to develop effective marketing strategies to improve competitive positions;
- Assessing the real risk of losing customers;
- Insight into the real costs and commercial considerations of shipping lines when selecting a port/terminal;
- Strategies to compete in transshipment markets;
- Future changes in port and container terminal management in the post-crisis era.

OSC and their associates have unrivalled expertise in the container terminal and port sector and can bring together objective appraisals of demand growth with specific experience in the field of terminal marketing and management, operations and development. This new study condenses this experience and provides an essential guide to all those currently running, expanding or planning to develop new container terminals.

Key specialists in these fields have prepared the study and it is designed as a tool for those involved in developing and managing existing and greenfield ports and container terminals in an increasingly competitive environment.

CONTENTS

Part One - Driving Forces Shaping the Market after the Downturn

The outlook for the container market is highly uncertain. Projecting the pace of future demand growth and projected volumes has become highly problematic. The shipping market remains in deep crisis and it is likely that there will be considerable changes in ownership in this sector. At the same time a size-based technical revolution is underway in the container shipping business. All of these factors will combine to make terminal development and planning a much more complex undertaking.

The major issues and driving forces facing the market – and the impact of the recent demand contraction – are considered in detail.

Part Two - Container Terminal Management

The crisis revealed new issues for the management of container terminals and ports to address. Future container terminal management will need adjustments of current commercial, financial and operational strategies. The study provides a detailed assessment of these issues and provides tools for those involved in the sector.

Part II of the study is structured as follows:

ABOUT THE AUTHORS

This is the third collaboration between Remco Stenvert and Andrew Penfold and follows from the publication of the studies 'Marketing of Container Terminals' and 'Container Port Strategy'.

Remco Stenvert is Manager Corporate Development for Europe Container Terminals (part of the Hutchison group - the world's largest container stevedore) in the port of Rotterdam. Prior to this he has held various marketing posts at ECT since 1993. He has been responsible for establishing pricing structures, dedicated terminal concepts, joint ventures, e-business initiatives and new activities and ventures. He is co-founder of a number of companies, amongst which are Maasvlakte Transport BV, Delta Reefer Care, Home Reefer Care and TCT, a tri-modal hinterland terminal in Belgium. He has held positions as chairman of the Supervisory Board of Delta Reefer Care and as board member of PortofRotterdam.com. Prior to ECT, he was senior management consultant at Ernst & Young, based in the Netherlands.

Remco holds a Master of Business Economics degree from the Erasmus University of Rotterdam with concentrations in marketing. He was a lecturer in marketing and sales management at the Institute for Social Sciences (ISW) in the Netherlands.

Andrew Penfold has over 25 years experience as a shipping economist and is a Director of Ocean Shipping Consultants Ltd. the leading independent firm of market analysts with extensive experience in shipping, port economics and development projects.

Since founding the firm in 1985 he has been responsible for dry cargo shipping and port development with specific reference to containerisation. Andrew has been responsible for cargo market forecasting and port investment projects in numerous worldwide locations. At the global level, his clients include the PSA Corporation, Hutchison Ports, DP World, the World Bank and the Ports of Rotterdam, Antwerp and Felixstowe. Considerable expertise has also been developed with regard to container shipping operations and clients have included Lloyd's Register of Shipping and major liner operators. Andrew has been directly involved in the establishment and expansion of container terminals all around the world and has acted as advisor to project promoters and been responsible for financial 'due diligence' investigations.

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is one of a series of highly detailed studies published by Ocean Shipping Consultants Ltd about container shipping, ports and associated markets. Among other recent titles are:

'North European Containerport Markets to 2020'

'Container Port Strategy'

'Containerport Markets in the Middle East and South Asia to 2020'

'East Asian Containerport Markets to 2020'

'Containerport Markets in the Americas to 2020'

'Marketing of Container Terminals'

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- a post crisis perspective

By Remco Stenvert & Andrew Penfold

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