

Container Port Efficiency

The key to success

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17. January 2019

- ➡➡ **Trends in the new normal**
- ➡➡ **Creating business value**
- ➡➡ **What can we do in Gothenburg?**



OUR TERMINALS

Optimizing our footprint to be where our customers need us most.

22,000 employees

5 new facilities in development

39.7million containers handled in 2017*

100+ Inland Services Operations

1000s of customers served

5.4% global market share of container throughput in 2017

69 countries

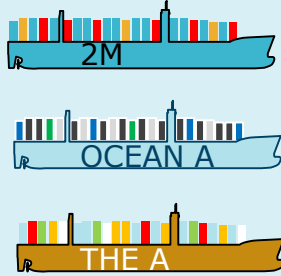
74 operating port facilities

● Ports ● Inland services

APM TERMINALS  **Lifting Global Trade.**

Market trends drive transports and logistics

Consolidation of
global shipping
lines



Larger vessels
means less
port calls



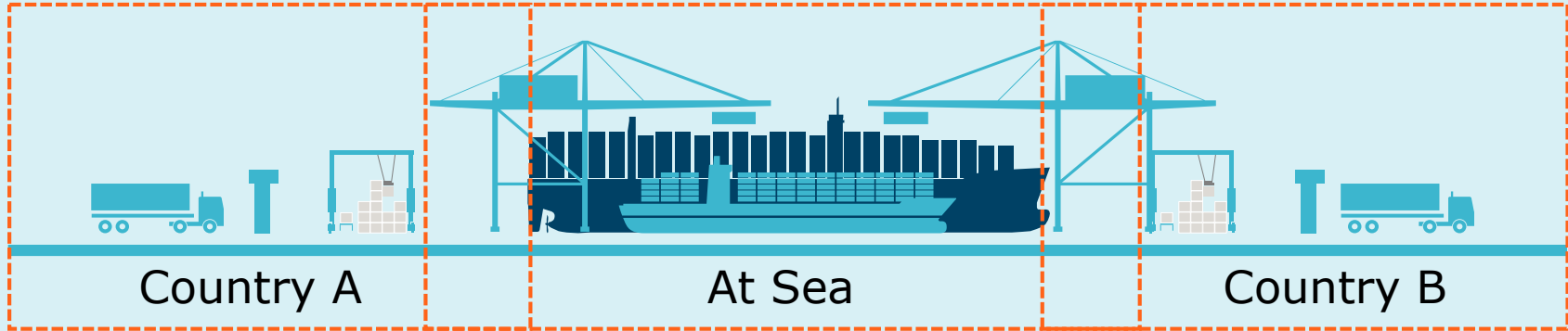
Global
requirements
increasing



Digitalisation and
automation will
transform ports



The new normal ... with new demands



- Customers demands: **Predictability**, **Flexibility** and **Connectivity** at Lowest costs
- Improved **Administration** and **Landside** in ports
- **Digitize** the business, the whole Logistics industry will **be connected**



OUR EMPLOYEES ARE INVOLVED IN THE FUTURE: "The port dockworker is transforming into a logistics operator"



APM Terminals, Gothenburg

The future logistics operator:

- Positive to new technology
- Multi skilled competences
- Increased logistics knowledge
- Flexible working hours

Benefits:

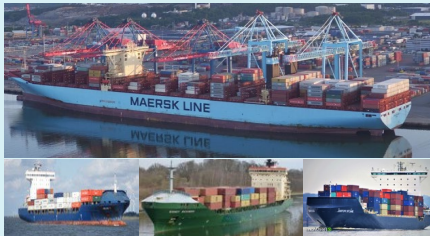
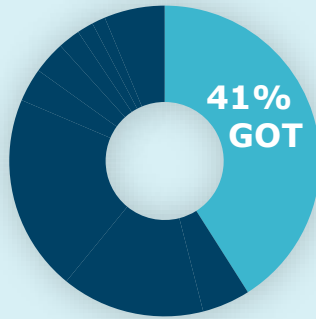
- Improved work environment
- Increased social activity
- Part of shaping the future



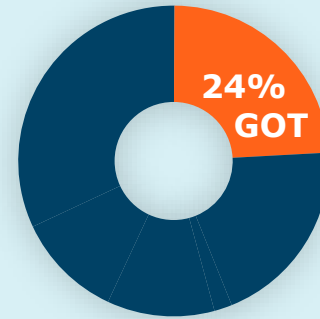
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90% Sweden's trade connects via ports: 180 Mill. tons/year

Swedish container market
Annual growth 3-3,5%

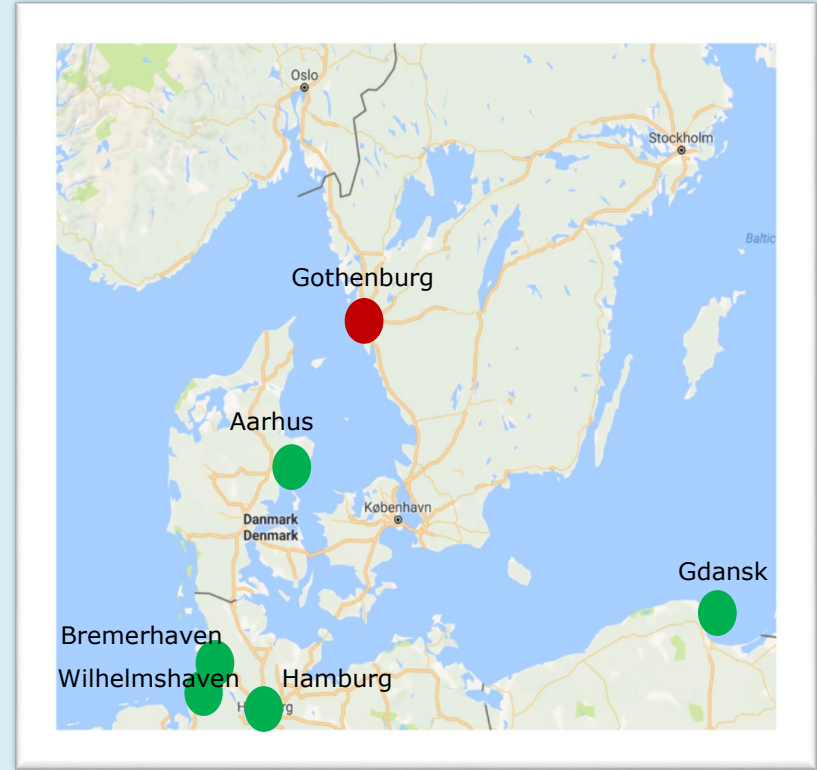


RoRo, rail / trailer market
annual growth 5-6%



Swedish trade is under pressure

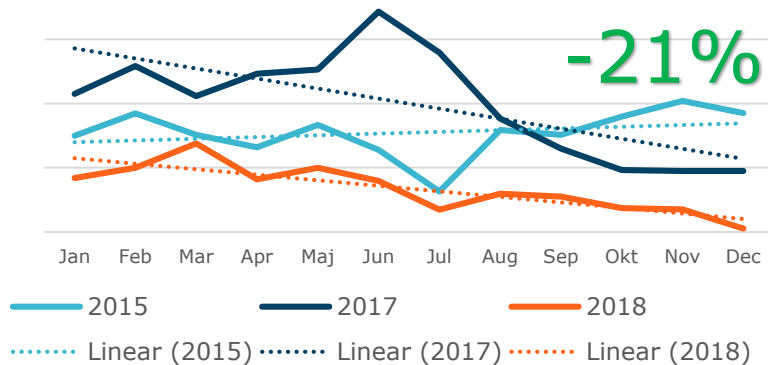
- Sweden is at the END of world's largest trade corridor; Asia – Europe
- Swedish container market is “small”: 1 Million 40' containers/year
- Gothenburg at risk of losing mainliner calls opportunities
- Risk of extra costs and time for transshipment and feeder vessel



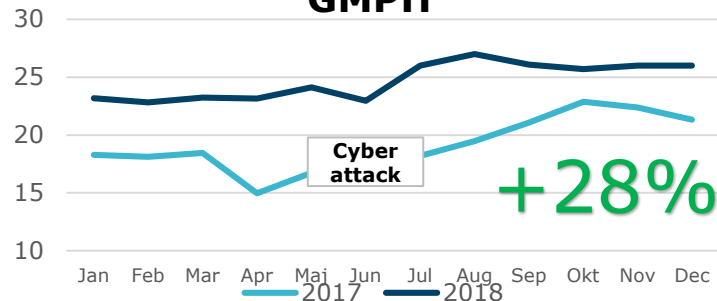
Improved customer service and higher efficiency

- Strong development in customer service and productivity
- Cost/move down vs last year.
- Man h/move significantly lower than 2015 prior to the transformation start.

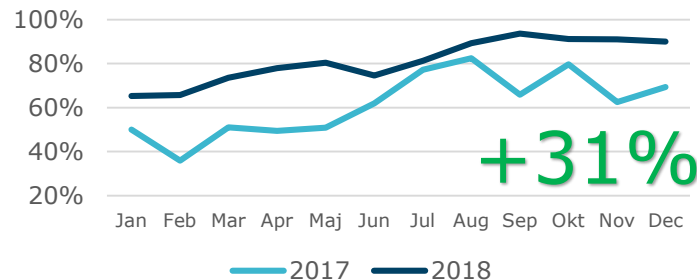
Man Hour per move



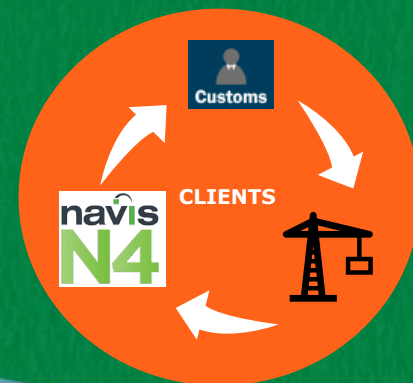
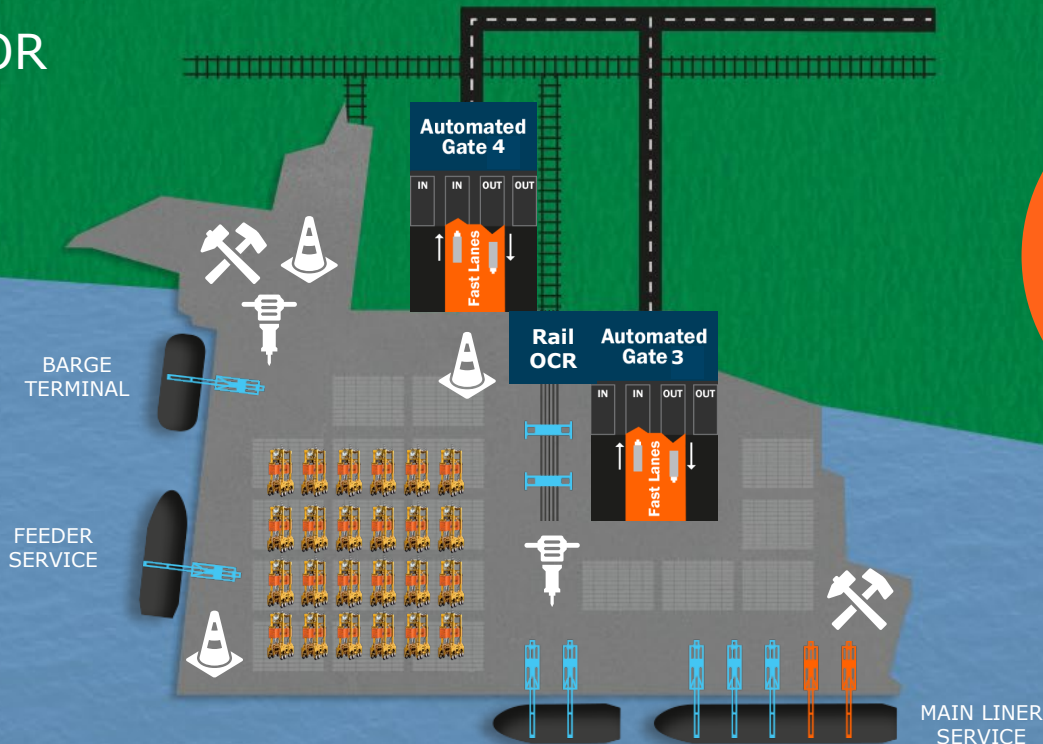
GMPH



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PREPARING FOR TOMORROW....



1

The Basics

- Yard Upgrade
- Safety Design
- Refurbishing

2

Equipment investments

- 24 SC4H, prepared for Automation.
- 2 Rail Cranes
- 2 SuperPost Panamax Cranes

3

Digitalization

- Navis N4 (TOS)
- EDI optimisation

4

Landside Infrastructure

- Automated Gates
- Rail OCR

OUR JOURNEY
CONTINUES

Gothenburg landside can generate new value

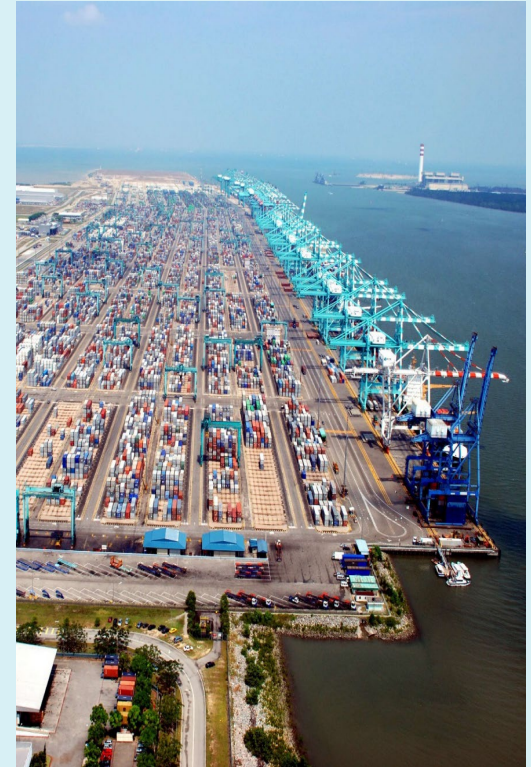


5 URGENT NEEDS:

- **Gothenburg Gateway**, all port and logistics businesses **work together**
- Increase **empty container depots** outside the port area,
- Establish **Land Control** to improve efficiency at "Hamnbanan"
- **Price the logistics park available land** to Int. Retail and Distribution Centres
- Execute **Digital Strategy** for the Port Community users

Summary - creating shared value

- Port efficiency is more than efficiency in the port, improved collaboration key
- Digitalisation can help reduce lead times, correct information at the right time
- Automation necessary to reduce cost long term and shorten port stays, if carried out the right way
- Rail + Direct services a competitive advantage for Sweden and Gothenburg



Movie



Lifting Global Trade™

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