

FONASBA ANNUAL MEETING VENICE 2012

**“Mega Ships ...state of the art :
are ports able to take the challenge?”**



TEUS MOVED GLOBALLY

1980	11,4 mio
2000	60,5 mio
2012	150,0 mio

UPS/DOWNS CONTAINER TRADE

2009 **-10%**

2010 **+11%**

2011 **+8%**

Forecast 2012 **+7%**

Average **+8%**

2001/2011



REDUCTION OF COSTS



HEALTHY RETURNS



NEW GENERATION OF SHIPS



ULCS

2015



274 SHIPS

ULCS : WHO ?

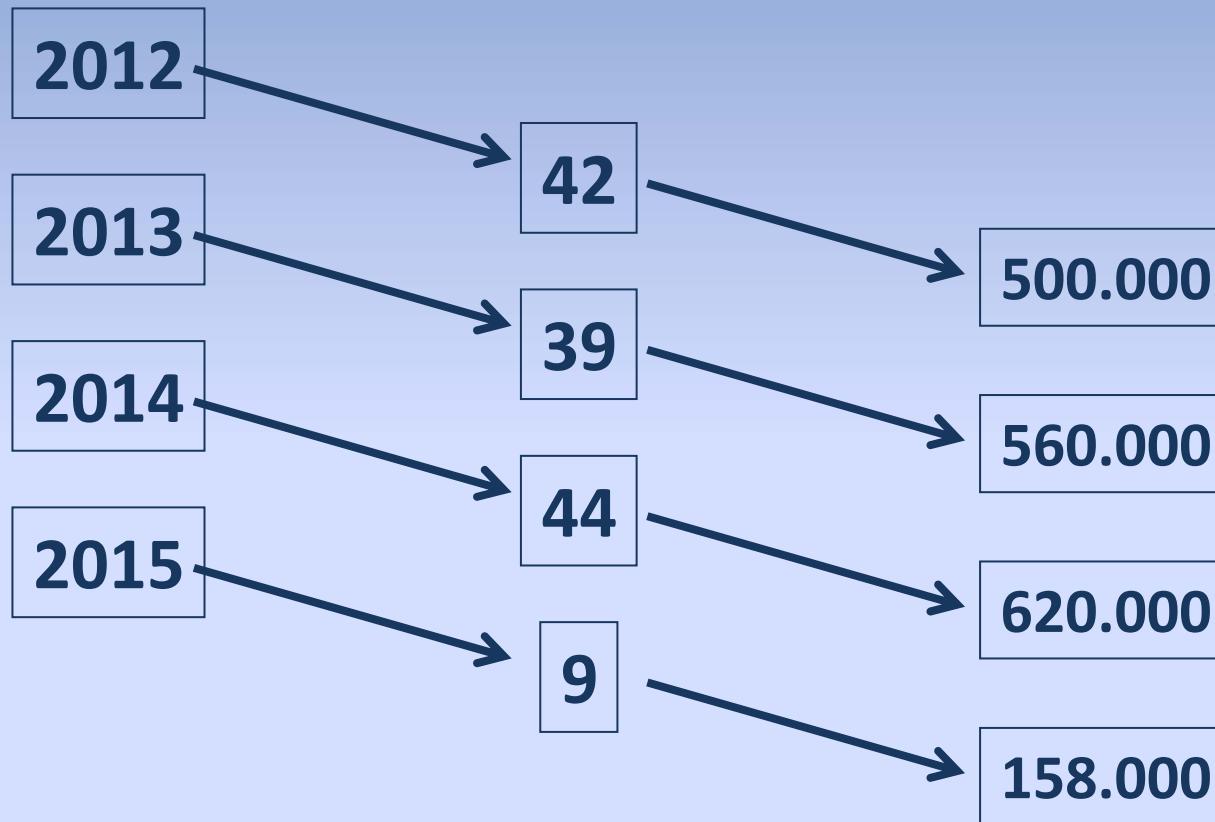
<i>CARRIERS</i>	<i>VESSELS</i>	<i>TEUS</i>
MSC	62	842.000
MAERSK LINE	38	620.700
CMA-CGM	29	361.800
COSCON	24	291.900
HANJIN	19	218.300
CHINA SHIPPING	16	192.600
APL	15	174.500
EVERGREEN	12	158.100
ZIM	11	133.100
HAPAG-LLOYD	10	132.000
HYUNDAI	10	131.000
UASC	9	119.700
OOCL	6	79.200
MOL	5	70.000
NYK	4	52.800
NON OPERATING OWNERS	4	50.000
TOTAL ULCS	274	3.628.100



ULCS : WHERE?



ULCS 12.000 TEUS PLUS





Source: Maersk Line



UPGRADE OF SHIP CAPACITY TO SHIPYARD

CMA-CGM	13.800	TO	16.000
HAPAG-LLOYD	8.750	TO	13.100
NOL	8.400	TO	9.200
NYK	6.350	TO	8.000



THE NEW WORKHORSE

13.000 / 13.800 TEUS SIZE



SHIPS WITH GREAT VERSATILITY



SLOW STEAMING



VARIABLE LOAD FACTOR

OPERATING DRAFT

INFRASTRUCTURES

THE CHALLENGE OF THE PORTS

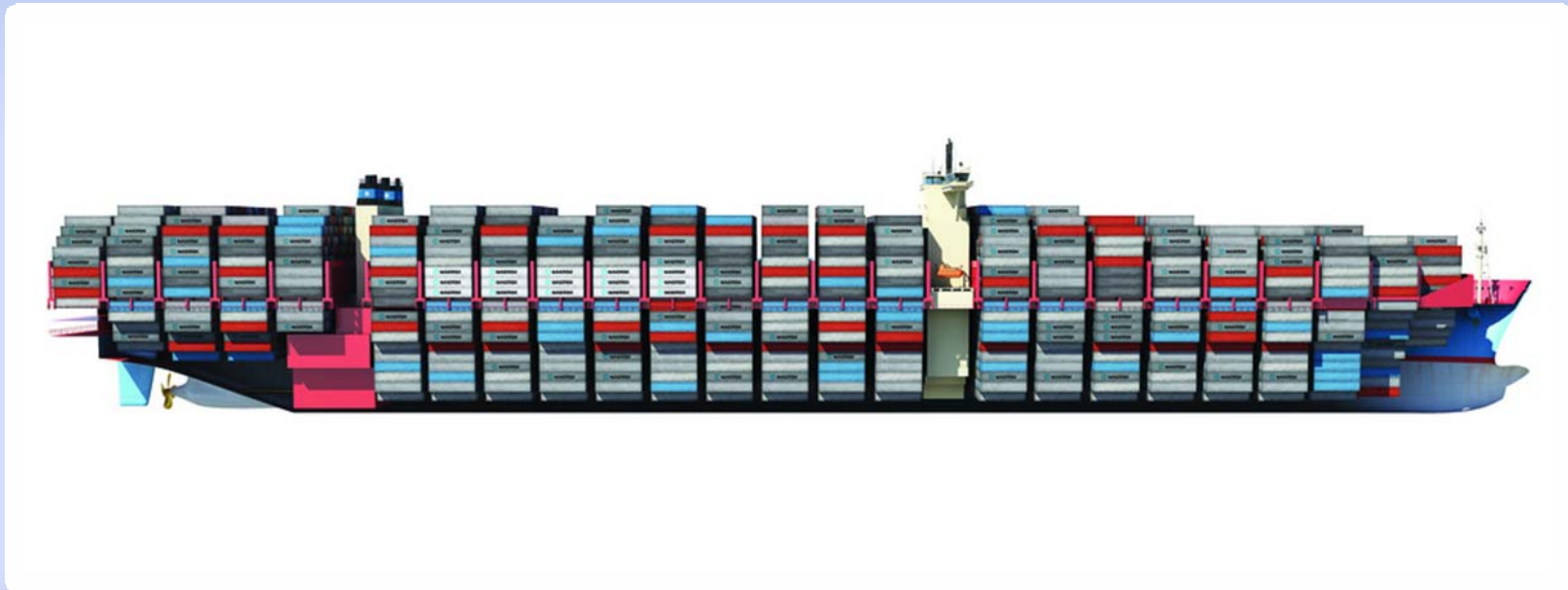


THE CHALLENGE OF THE TERMINALS

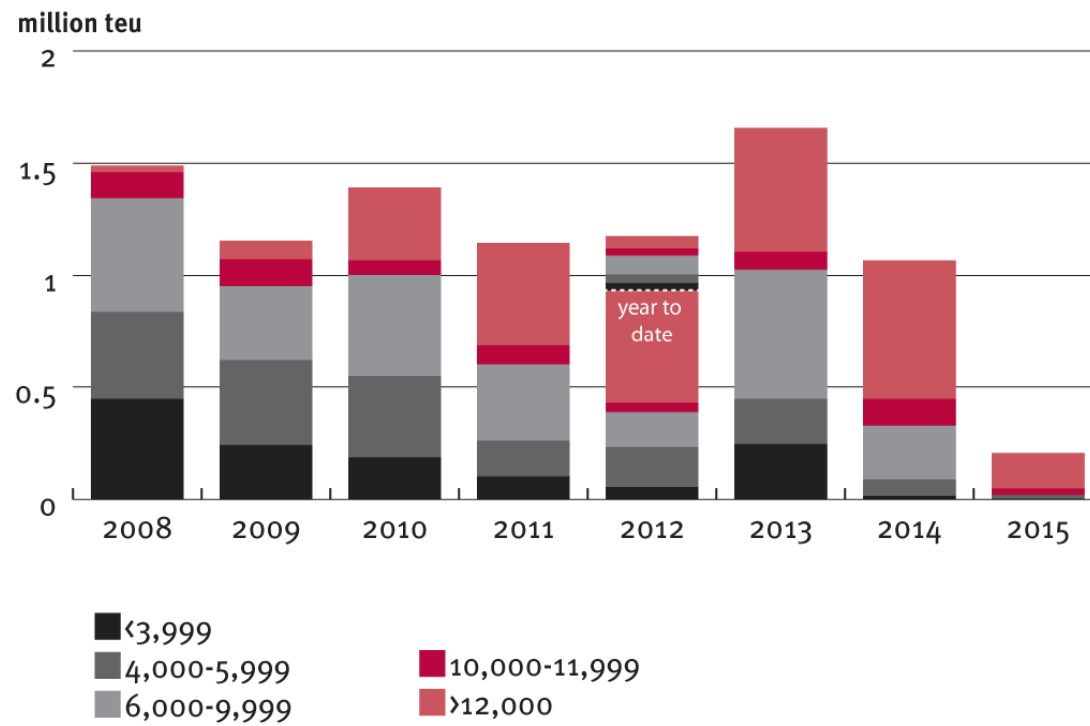
**SLOW STEAMING IS JUST FOR SHIPS
NOT FOR OWNERS,
AGENTS OR BROKERS**



BIG IS BEAUTIFUL?



CONTAINERSHIP NEWBUILDING DELIVERIES



Source: Lloyd's List Intelligence



PORTS AND TERMINALS

ULCS: *YES OR NO ?*

CHINA

YES

NORTH ASIA

YES

SOUTH EAST ASIA

YES

PORTS AND TERMINALS

ULCS: YES OR NO ?

U.S.A.

YES and NO

U.S.W.C.

MAX 13.800 TEUS

U.S.E.C.

MAX 9.500 TEUS

PORTS AND TERMINALS

ULCS: *YES OR NO ?*

NORTH EUROPE

YES

MEDITERRANEAN

YES and NO ...

... WORK IN PROGRESS !!

WHAT'S UP IN ITALY?

DESTINATION PORTS

REGIONAL HUB PORTS

THE CHALLENGE IS THERE !

WILL WE BE ABLE TO WIN IT ?



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Thank you

