Port of Rotterdam
How we benefit from the EU and our view on ASEAN

Mrs. Sofie Tolk – Commercial Representative S-E Asia
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Talking ASEAN : The Business Series
Contents

• Introduction Port of Rotterdam
• Connectivity to EU market
• Port of Rotterdam International: ASEAN potential
• Q&A
The port today: a diversified port-industrial complex stretching more than 40km (12,600 ha)
Several port areas

Maasvlakte 1

Botlek

Europoort

Maasvlakte 2
Key performance indicators Rotterdam - 2016

**Total Throughput**
461 Million tons
(Tg. Priok 50 mio tons)

**Container Throughput**
12 Million TEU
(Tg. Priok 5.4 mio TEU)

**Market Share**
38%
In the Hamburg-Le Havre Range

**# Vessels**
30,000 Per year
(+ 100,000 Barges)

**EBIDTA**
€ 448 Million

**Investments**
€ 2 billion
During 2010-2016
Throughput by cargo type
Port of Rotterdam, 2016

Breakdown
Percent of total throughput

Volume
Million tons

<table>
<thead>
<tr>
<th>Cargo Type</th>
<th>Percent of Total</th>
<th>Volume (Million tons)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Liquid Bulk</td>
<td>48%</td>
<td>224</td>
</tr>
<tr>
<td>Containers</td>
<td>28%</td>
<td>127</td>
</tr>
<tr>
<td>Dry Bulk</td>
<td>18%</td>
<td>82</td>
</tr>
<tr>
<td>Other</td>
<td>6%</td>
<td>28</td>
</tr>
<tr>
<td>Total</td>
<td></td>
<td>461</td>
</tr>
</tbody>
</table>

Source: Port of Rotterdam
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500 million consumers within 24 hours reach
Maritime connectivity: Shortsea and RoRo connections

All shortsea destinations from Rotterdam
Inland waterways
With ambitions to grow from 35% to 45%

Weekly barge frequency from Rotterdam into EU
Overland connectivity: Rail connections
With ambitions to grow from 11% to 20%

Weekly rail frequency from Rotterdam into EU
Main benefits from a Single EU Market

• **Economic benefits**
  - Free trade and removal of non-tariff barriers
  - Removal of customs barriers
  - Consumer benefits
  - Attract foreign investment

• **Free movement of Labour and Capital**
  - Creates a more flexible economy
  - Mutual recognition of safety standards and protection for workers

• **Political and legal benefits**
  - Legal and human rights
  - European Arrest Warrant

• **Environmental benefits**
  - Joined efforts through environmental treaties
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WORLD PORT NETWORK

PORT OF ROTTERDAM NETWORK
CURRENT PROJECTS

LEGENDA
- World Port Network
- Projects

Port of Rotterdam
Kuala Tanjung
Jakarta Port

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Our primary focus is to connect markets around the world

**Primary focus: port development**

**Port Development JVs**
- Develop greenfield ports or expand brownfields with local partners

**Port Management Service Agreements**
- Trusted partner on all aspects of port management

**Partnerships with global maritime players**
- Strengthen ties with global maritime players through international activities
- Work with global maritime players to develop opportunities overseas

SOHAR Port
We have a proven track record

Sohar, Oman

1. Sohar 2002

2. Sohar Today

Sources: PoR, SOHAR Port & Free Zone, Yahoo Maps
Sohar has been a great success!

- Sohar, Oman, is arguably the fastest growing sea port in the world at a rate of 37% per year
- The port has grown rapidly on the back of a captive industrial cargo base inside the port
- Combination of logistics and industry works in making ports a success!

1 Includes containers and breakbulk cargo (i.e. project cargo)
We are working to replicate this success in Porto Central – Brazil
…and in Kuala Tanjung - Indonesia
ASEAN potential: the importance of maritime connectivity

• The market is there!
  - 600 million consumers
  - Young labour force
  - Global hub for manufacturing and trade

• But maritime connectivity needs to be improved:
  - Connecting “world class” ports
  - Improve infrastructure throughout the region
  - Reduce logistical costs

▪ Create single market benefits
  - Reduce protectionism and trade barriers

▪ Staying ahead of the game
  - Capacity building
  - Sustainability
  - Digitalization
  - Political harmony
We counsel ports globally on their development

Our Proprietary Port Analysis Model (PAM)

1. Market Positioning
2. Port Site
3. Port Governance
4. Port Finance
5. Port Operations

We provide:
- Cargo volume reviews or forecasting
- Master planning, port development strategies
- Health, safety and environmental best practices
- Stakeholder management expertise
- PoR commercial network
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