



HK

Handelskammer
Hamburg

PORT OF HAMBURG AT A GLANCE

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I. OVERVIEW OF THE PORT OF HAMBURG



I. OVERVIEW OF THE PORT OF HAMBURG

1. Universal port of Hamburg - Figures

- Total turnover 2016 138,2 million tonnes (+ 0,3 % vs. 2015)
- Container turnover 2016 8,9 million TEU* (+ 1,0 % vs. 2015)
- Ranking (container) 2016 3rd in Europe (after Rotterdam and Antwerp)
- Jobs dependent on the port 2014
 - in Hamburg 129.761
 - In the metropolitan region of Hamburg 155.562
 - the rest of Germany 113.127 } 268.689 total

- Vessel arrivals 2016 in total 8.719
 - Container vessels 4.163
thereof large containers (> 10.000 TEU) 686
 - Bulk, general and special cargo 2.224
 - Tankships 1.559
 - Ro-Ro, vehicle carriers 407
 - Passenger liners and cruisers 365

- Total port area 7.200 acres (ca. 10 % of Hamburg's total land area)

I. OVERVIEW OF THE PORT OF HAMBURG

2. The world's top 20 container ports

Country	Rank		Port	in millions of TEU		Change	in %
	2016	2015		2015	2016		
China	1	1	Shanghai	36,54	37,13	596	1,6%
Singapore	2	2	Singapur	30,92	30,90	-19	-0,1%
China	3	3	Shenzhen	24,32	24,22	-97	-0,4%
China	4	4	Ningbo-Zhoushan	20,62	21,57	949	4,6%
China	5	5	Hongkong	20,07	19,81	-260	-1,3%
South Korea	6	6	Busan	19,47	19,46	-12	-0,1%
China	7	8	Guangzhou	17,40	18,58	1183	6,8%
China	8	7	Qingdao	17,43	18,01	575	3,3%
UAE	9	9	Dubai	15,59	14,77	-826	-5,3%
China	10	10	Tianjin	14,11	14,50	395	2,8%
Malaysia	11	12	Port Kelang	11,89	13,21	1323	11,1%
Netherlands	12	11	Rotterdam	12,23	12,39	151	1,2%
Taiwan	13	13	Kaohsiung	10,26	10,47	201	2,0%
Belgium	14	14	Antwerpen	9,65	10,04	384	4,0%
China	15	16	Xiamen	9,18	9,60	422	4,6%
China	16	15	Dalian	9,45	9,59	142	1,5%
Germany	17	18	Hamburg	8,82	8,91	85	1,0%
USA	18	19	Los Angeles	8,16	8,86	696	8,5%
Malaysia	19		Tanjung Pelepas	9,12	8,28	-836	-9,2%
Thailand	20		Laem Chabang	6,82	7,23	406	6,0%

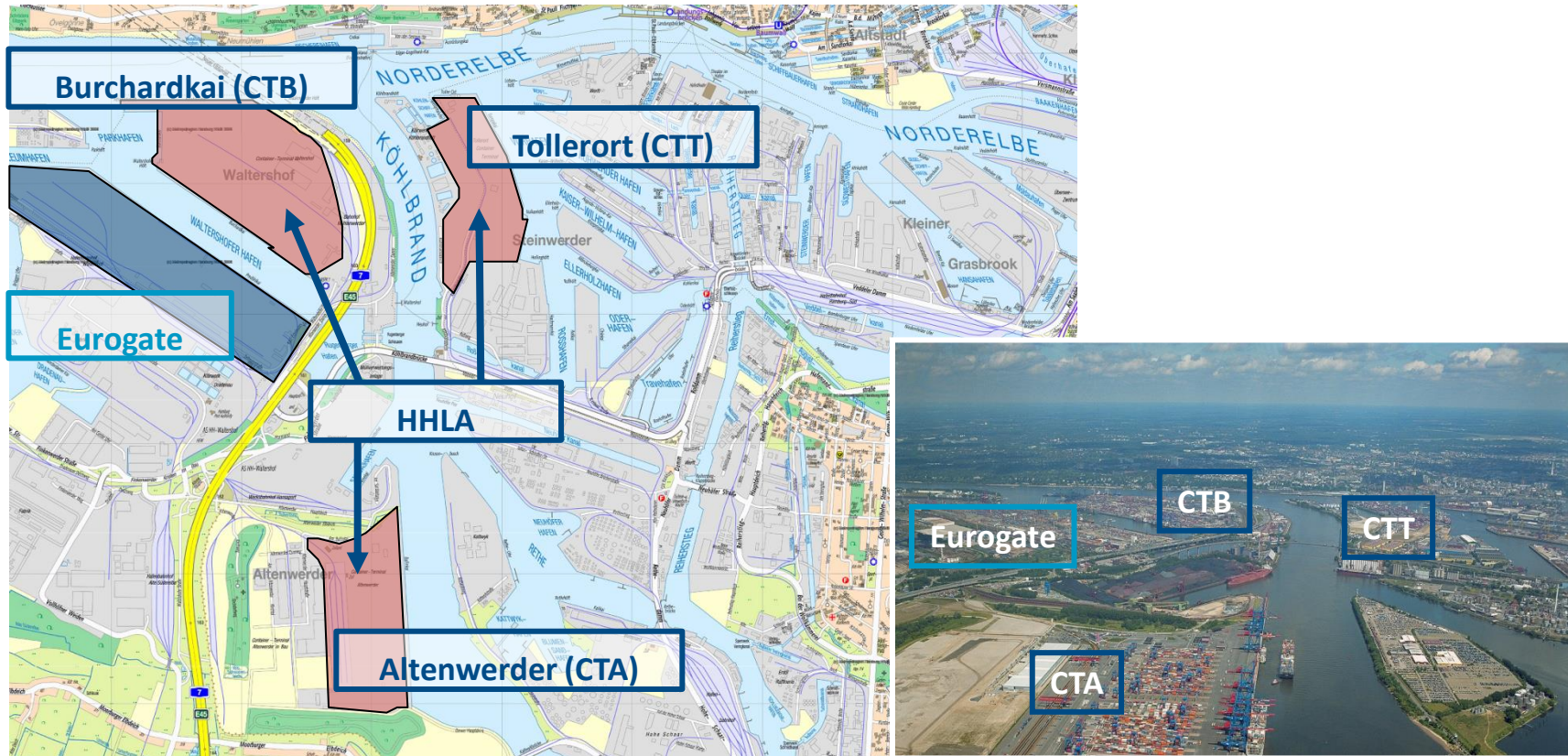
Source: Hafen Hamburg Marketing e.V.

II. TURNOVER AT THE PORT OF HAMBURG



II. TURNOVER AT THE PORT OF HAMBURG

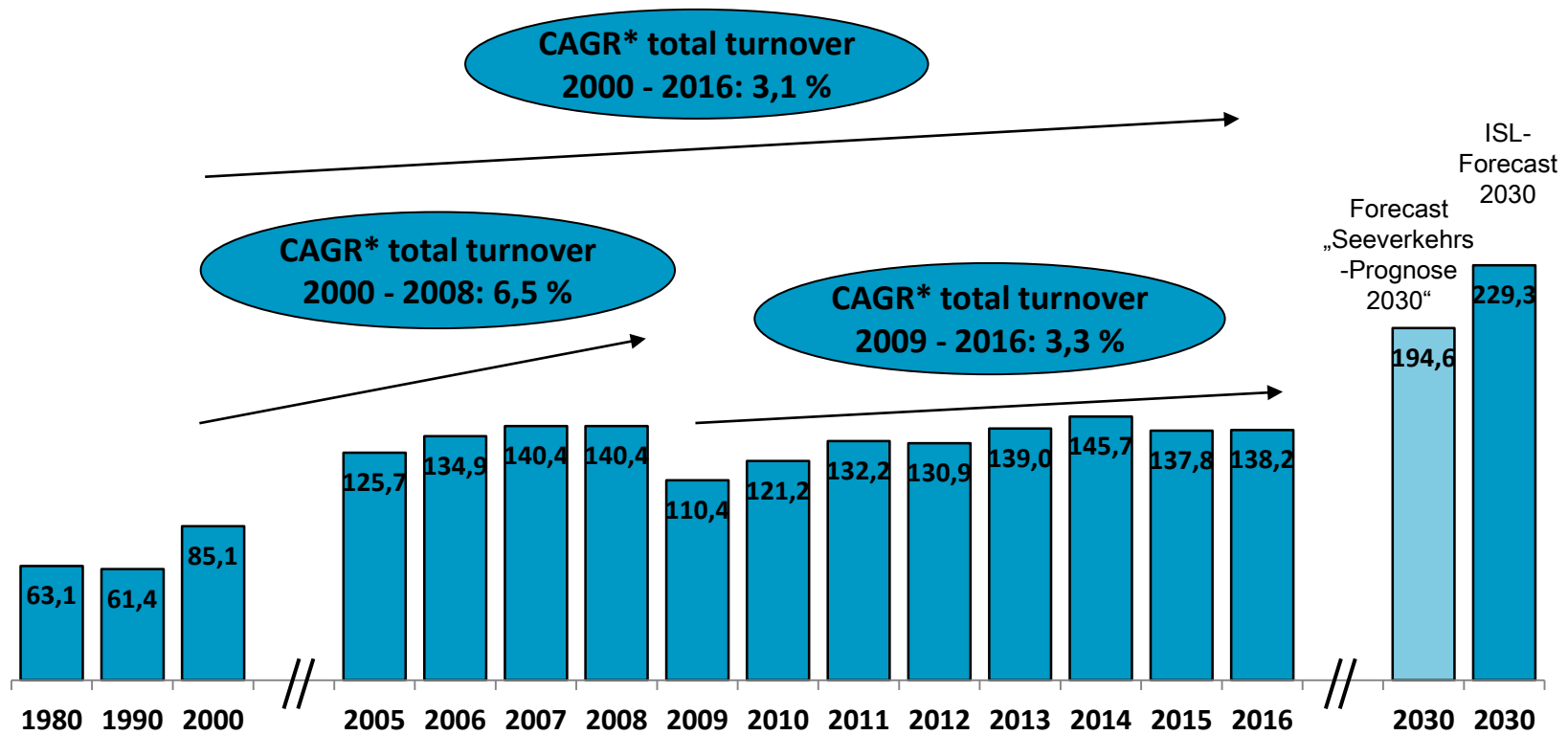
1. Terminals for the container turnover



Source: Hafen Hamburg Marketing e.V., own representation

II. TURNOVER AT THE PORT OF HAMBURG

2. Development of total turnover (in million tonnes)

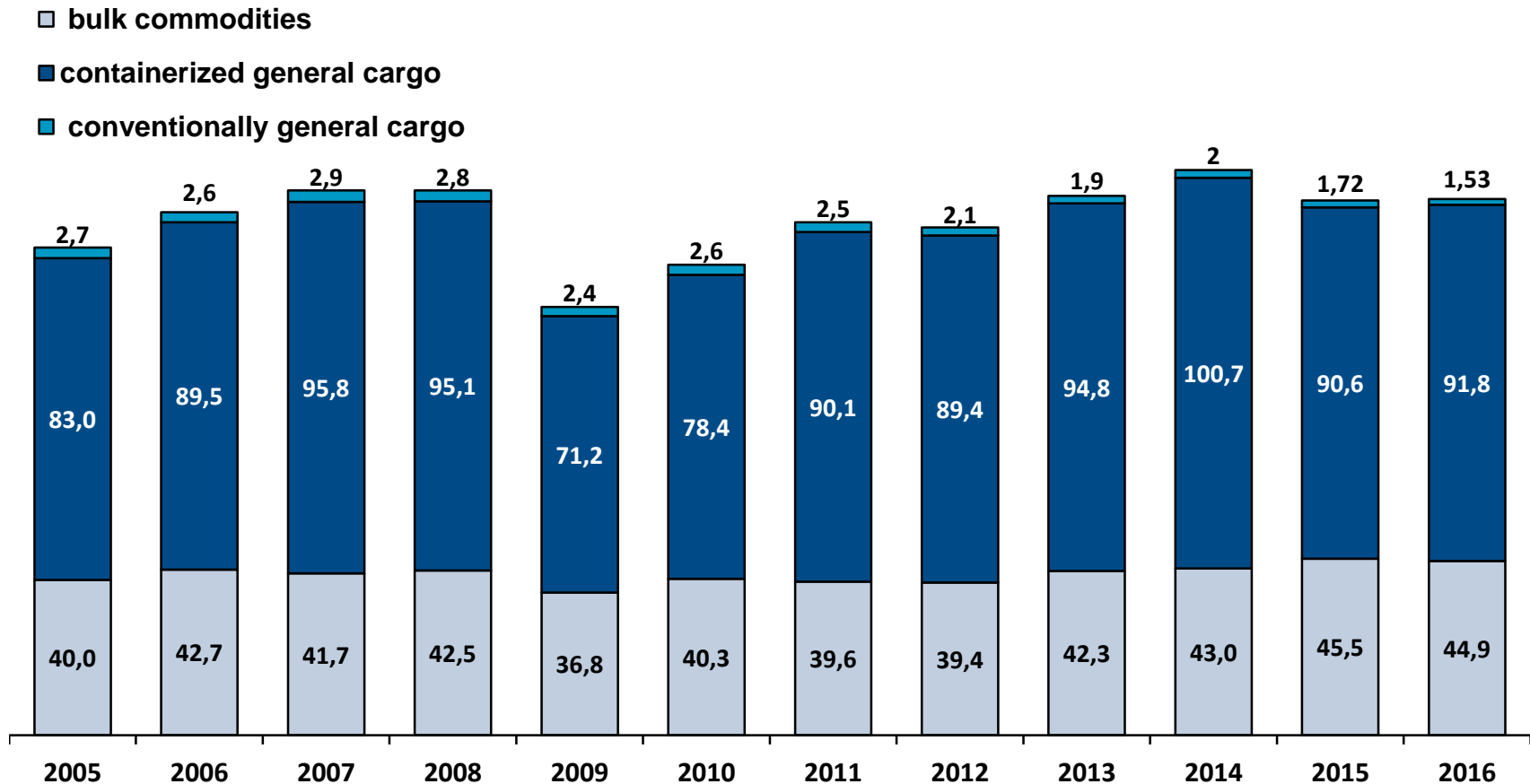


* CAGR (Compound Annual Growth Rate) = durchschnittliches jährliches Wachstum

Source: Hafen Hamburg Marketing e.V., Seeverkehrsprognose 2030, ISL Zwischenbericht 2015

II. TURNOVER AT THE PORT OF HAMBURG

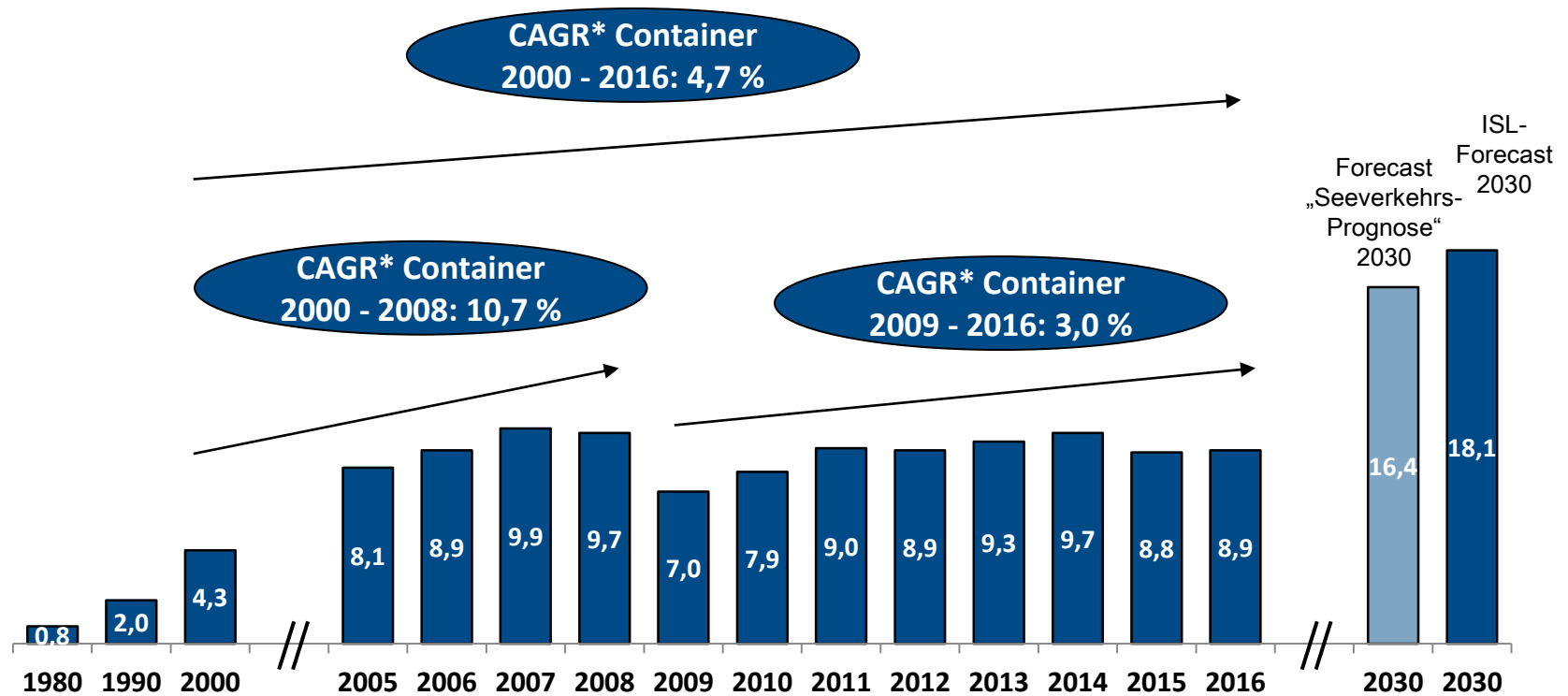
3. Division of total turnover 2005 to 2016 (in million tonnes)



Source: Hafen Hamburg Marketing e.V., Bundesministerium für Verkehr und digitale Infrastruktur (BMVI)

II. TURNOVER AT THE PORT OF HAMBURG

4. Development of container turnover (in million TEU)

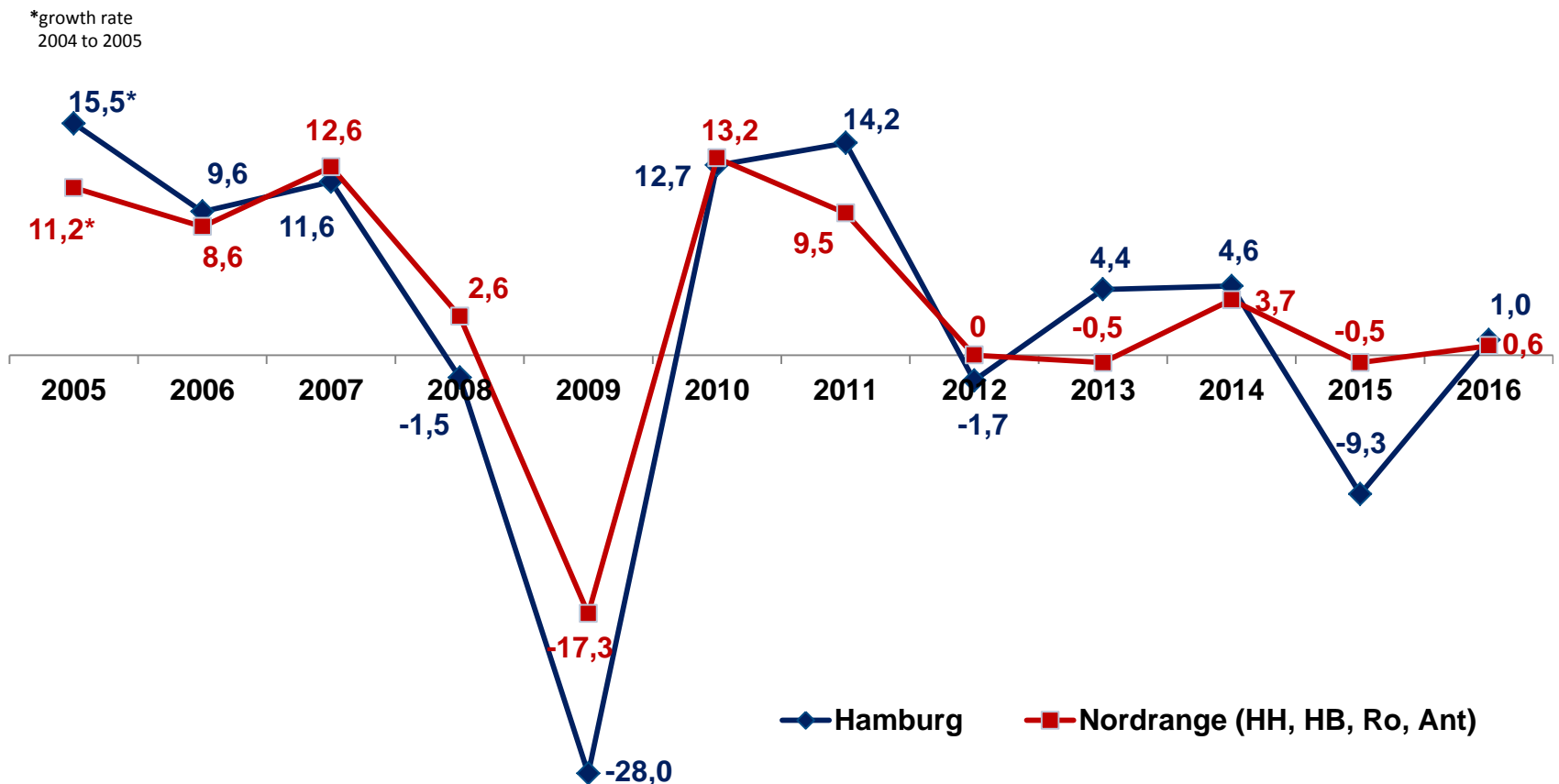


* CAGR (Compound Annual Growth Rate) = durchschnittliches jährliches Wachstum

Source: Hafен Hamburg Marketing e.V., Seeverkehrsprognose 2030, ISL Zwischenbericht 2015

II. TURNOVER AT THE PORT OF HAMBURG

5. Annual growth rate of container turnover 2005 to 2016 (in %)



Source: Hafen Hamburg Marketing e.V.



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UNTERNEHMEN BERATEN
INTERESSEN BÜNDELN
MENSCHEN BILDEN

III. FAIRWAY ADJUSTMENT



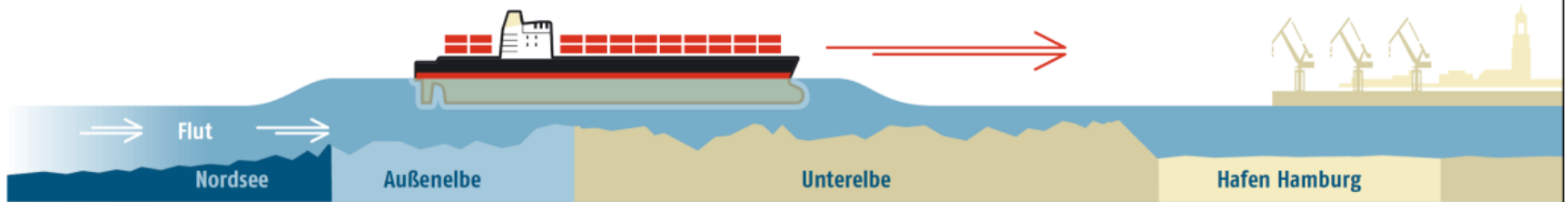
COSCO HAMBURG
HONG KONG

III. FAIRWAY ADJUSTMENT

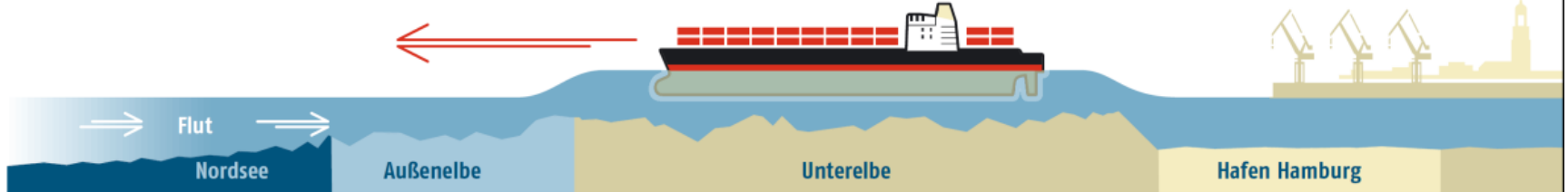
1. Shipping on the Elbe

Revierfahrt auf der Flutwelle

Tideabhängig einlaufendes Schiff



Tideabhängig auslaufendes Schiff

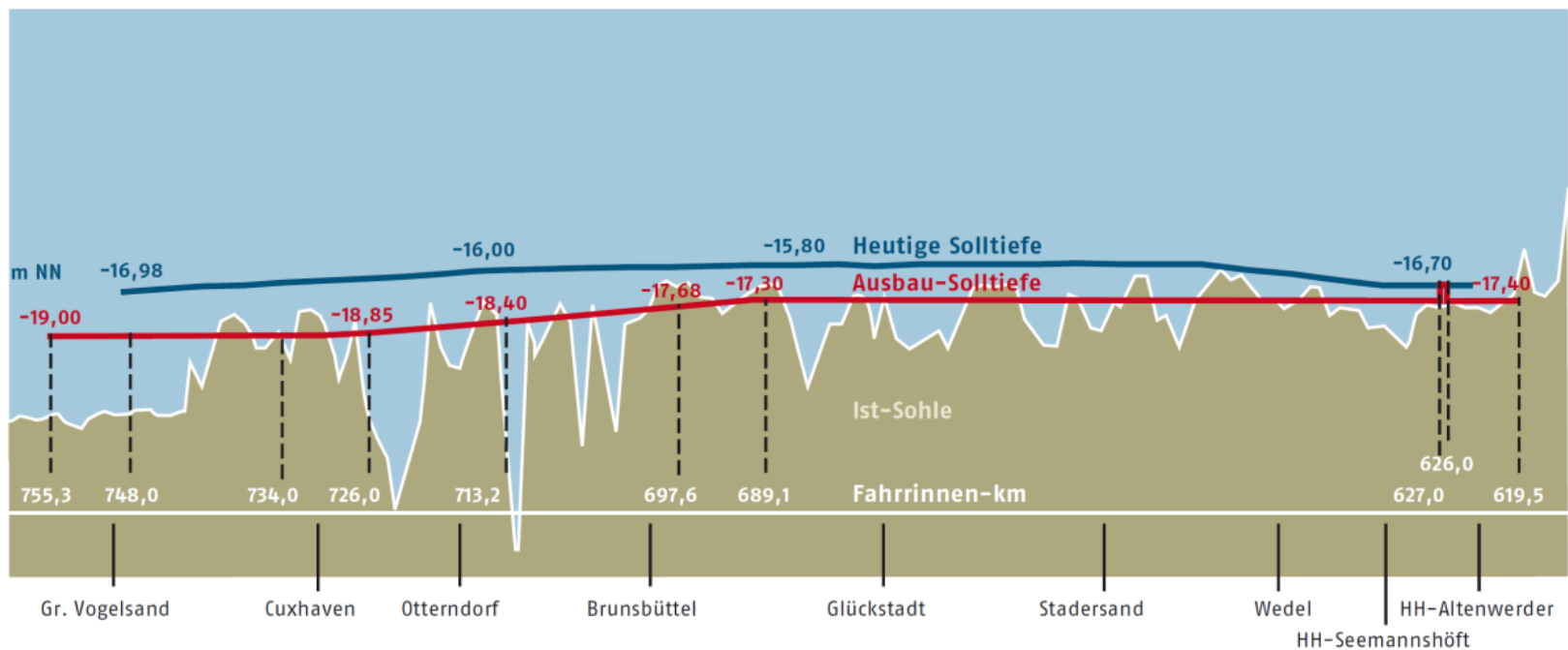


III. FAIRWAY ADJUSTMENT

2. Development goal

- 13.5 m independent of tide, 14.5 m depending on tide!

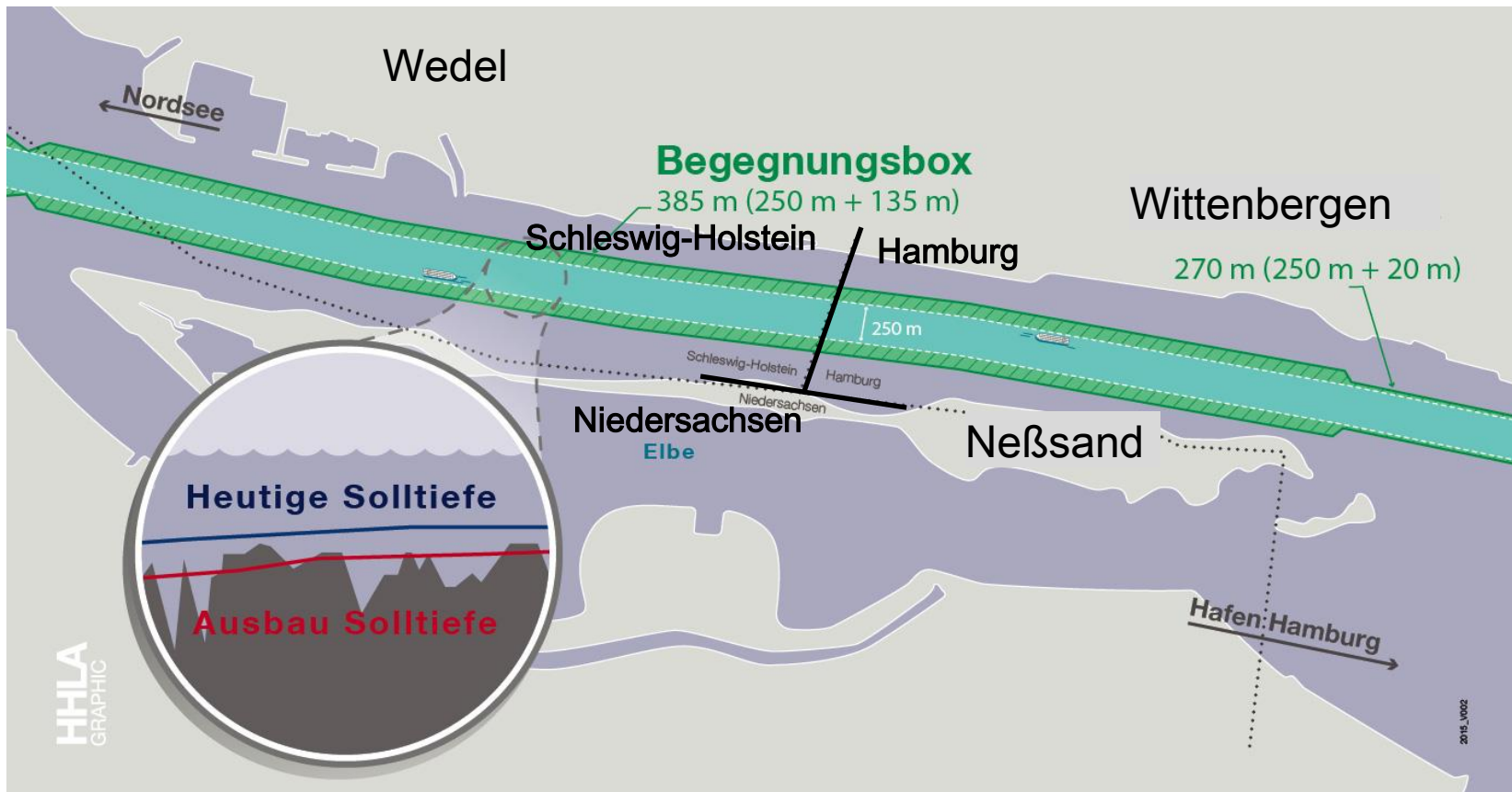
Ist-Zustand der Fahrrinnensohle, heutige und geplante Fahrrinntiefen im Längsschnitt



Source: Projekt Fahrrinnenanpassung

III. FAIRWAY ADJUSTMENT

3. Fairway adjustment = deepening of the Elbe + widening of the waterway

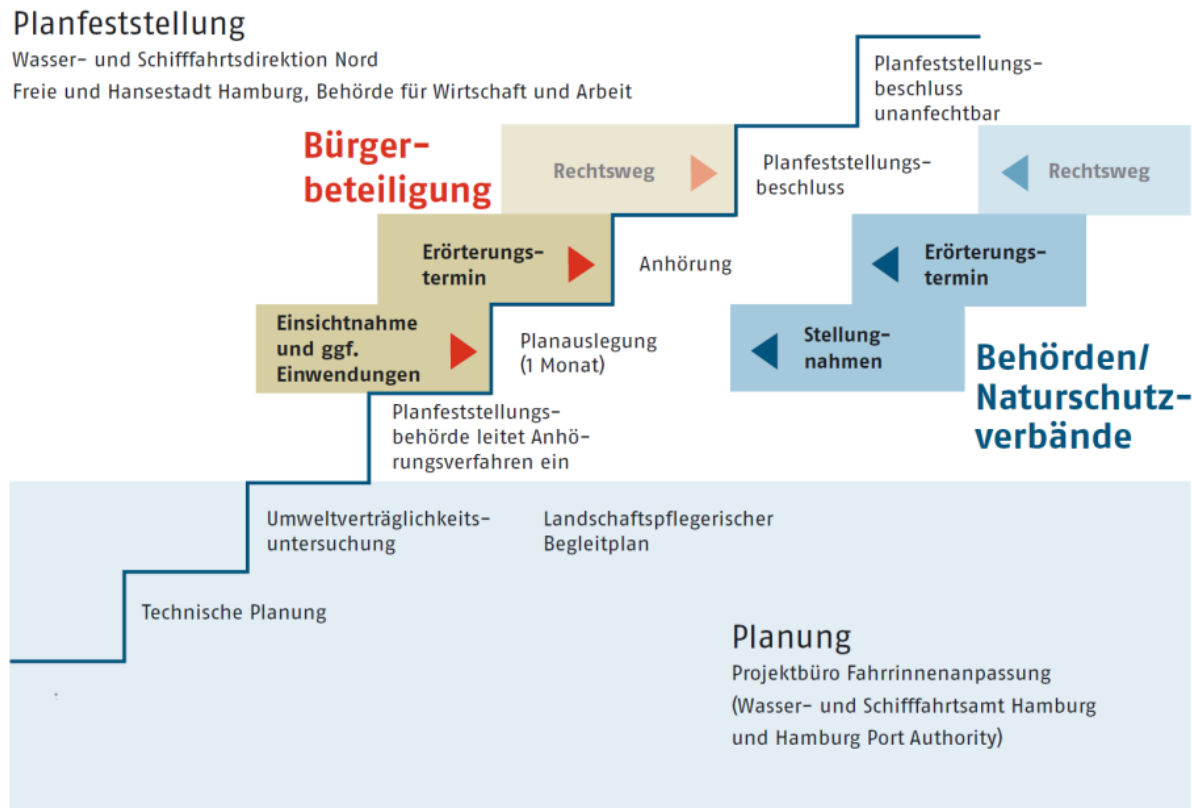


Source: Hamburger Hafen und Logistik AG

III. FAIRWAY ADJUSTMENT

4. Process of the plan-approval procedure

Ablauf des Planfeststellungsverfahrens



III. FAIRWAY ADJUSTMENT

5. Flashback on the previous process

- 2002: Proposal for the adaptation of the Elbe's waterway
- 2006: Proposal for the planning approval
- 2011: Statement of the European Commission
- 2012: Decree of the planning approval; Receipt of several complaints
- 2014: Suspension of the process; interpretation of the Water Framework Directive by the EuGH in the Weser-procedure
- 2016: Continuation of the process, hearing in december
- 2017: Verdict of the The Federal Administrative Court (BVerwG) on the 9th of February 2017

III. FAIRWAY ADJUSTMENT

6. The verdict of the 9th February 2017: Confirming Development

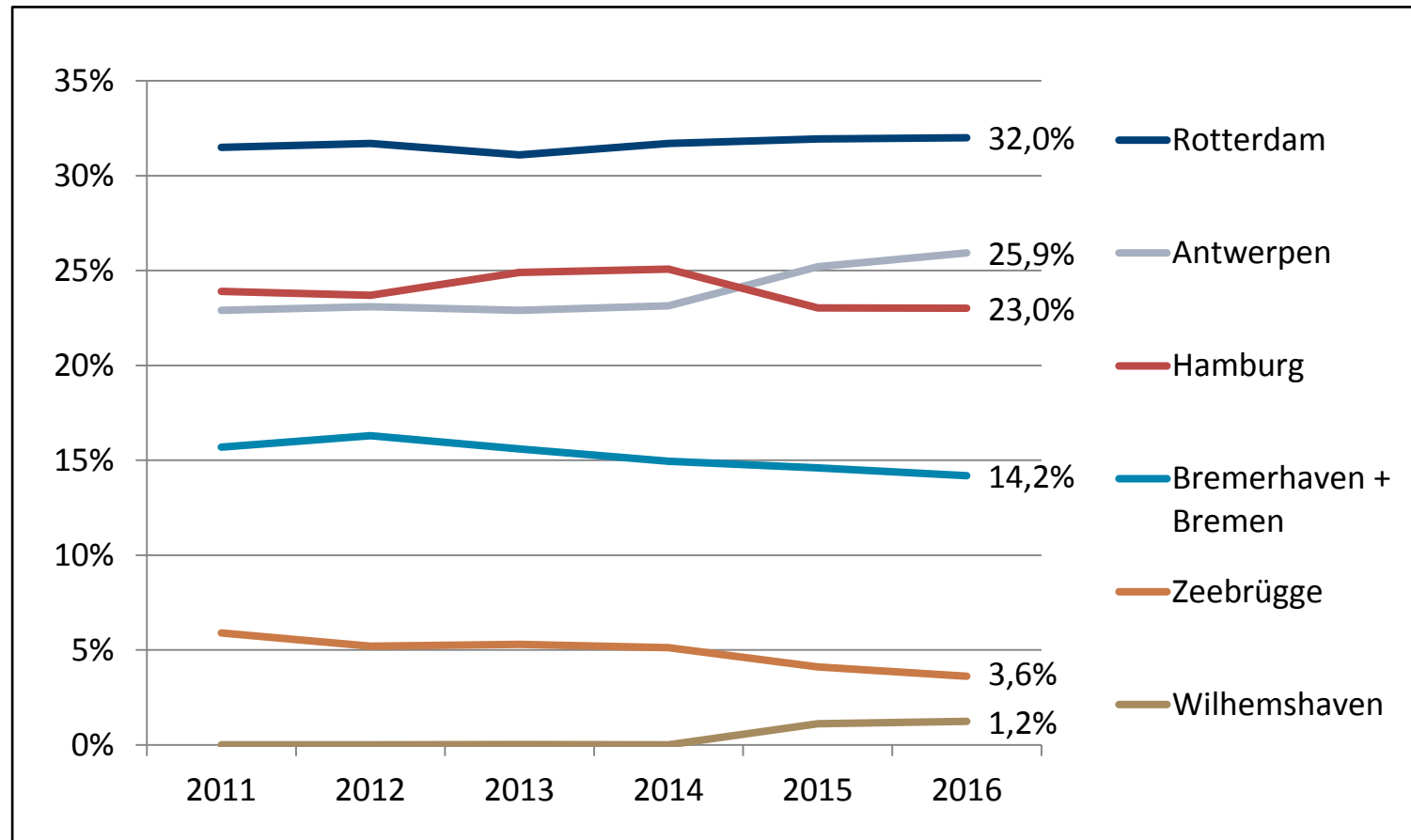
- ✓ Necessity and the lack of alternatives of the measures are confirmed
- ✓ Abidance of the European Water Framework Directive
- ✓ Projections of the Federal Waterways Engineering and Research Institute about the hydro- and morphodynamical impacts are not rejected
- ✓ No considerable impairments of other protected types (e.g. twaite shads or breeding bird species)
- ✓ No doubts about the survey of alternatives in the context of habitats directive

IV. PORT OF HAMBURG AND THE NORDRANGE PORTS



IV. PORT OF HAMBURG AND THE NORDRANGE PORTS

1. Market shares of container turnover

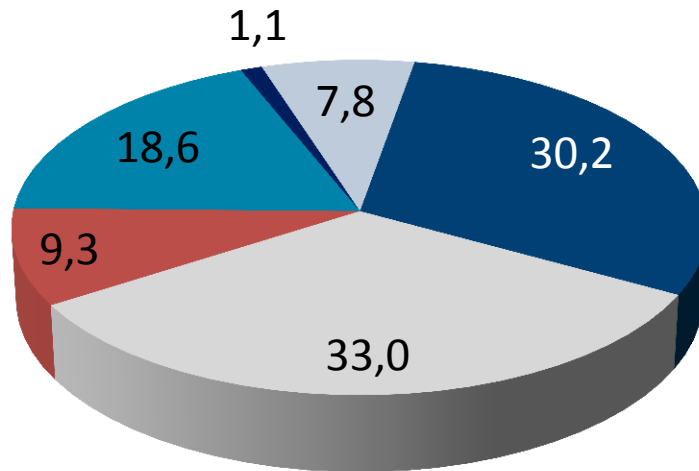


Source: Hafen Hamburg Marketing e.V., own calculation

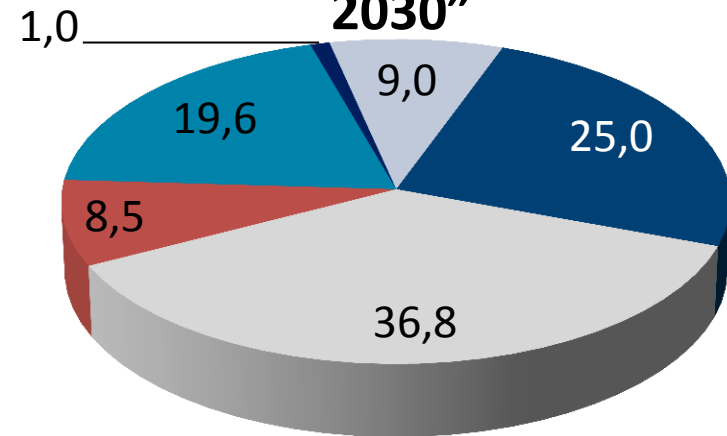
IV. PORT OF HAMBURG AND THE NORDRANGE PORTS

2. Shares in seaward german im- and export

turnover* (%)
2010



Turnover* (%)
Forecast
"Seeverkehrsprognose
2030"



- Rotterdam
- Hamburg
- Antwerpen
- Bremerhaven + Bremen
- Zeebrugge
- Wilhelmshaven

* For the foreign ports only those turnover volumes are considered that are relevant for germany's hinterland traffic.

Source: Hafen Hamburg Marketing e.V., own calculations , Bundesministerium für Verkehr und digitale Infrastruktur (BMVI): Seeverkehrsprognose 2030, S. 100



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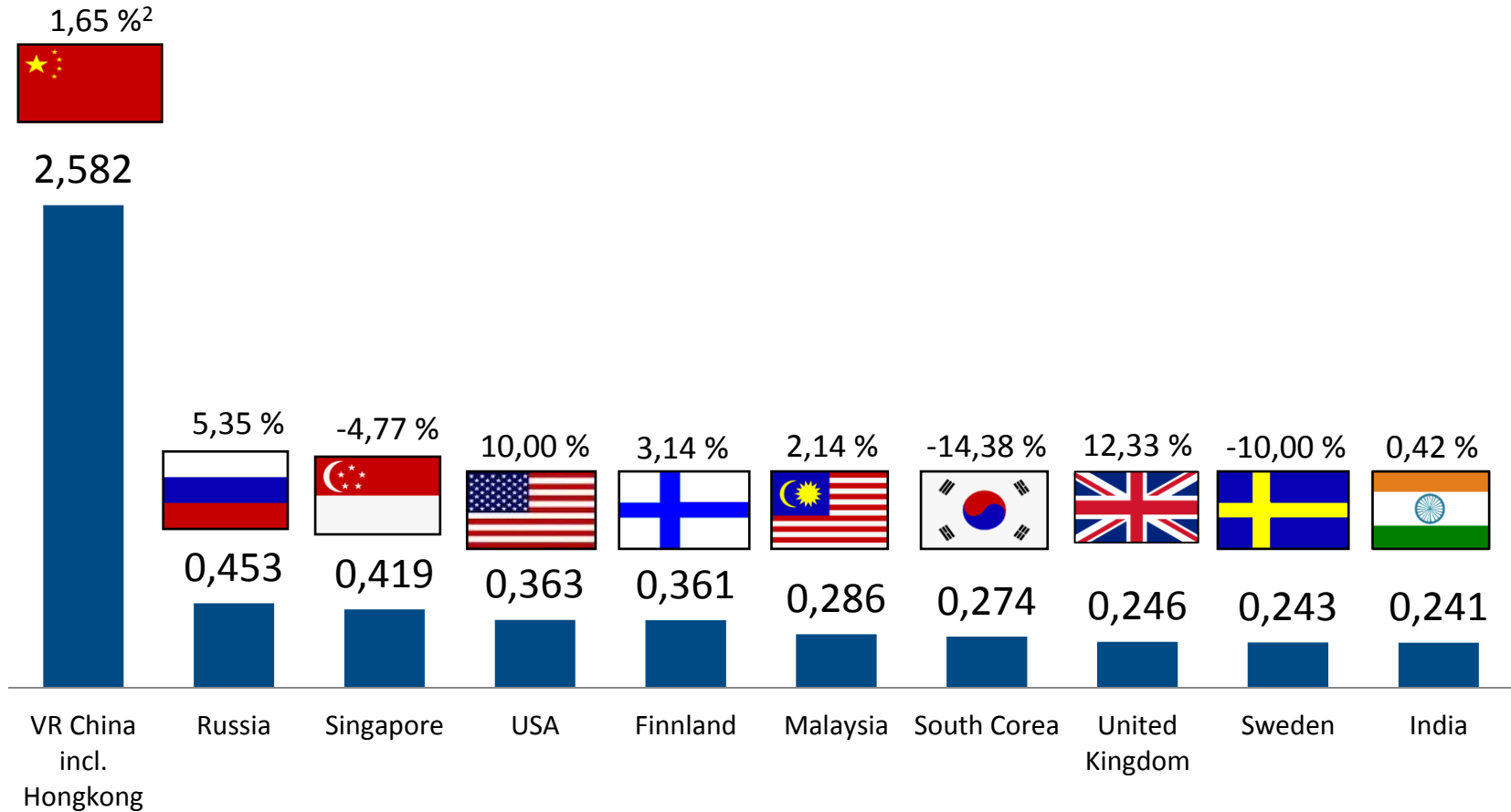
UNTERNEHMEN BERATEN
INTERESSEN BÜNDELN
MENSCHEN BILDEN

V. GLOBAL NETWORK



V. GLOBAL NETWORK

1. Top 10 trading partners of the port of Hamburg seaward container transport (2016)¹



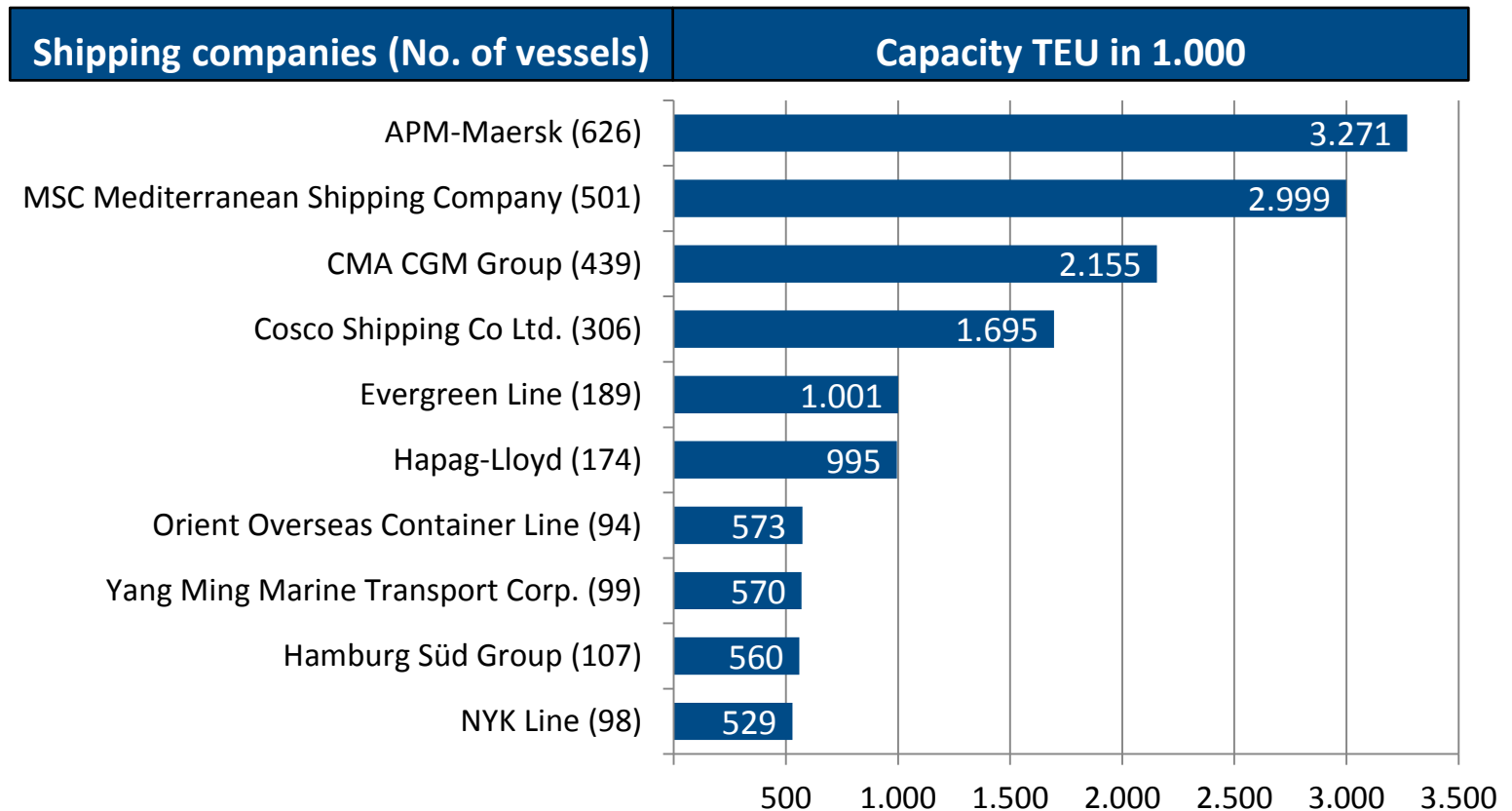
¹in million TEU (in-/outgoing)

²Change over the previous year in percent

Source: Hafen Hamburg Marketing e.V.

V. GLOBAL NETWORK

2. The world's top 10 shipping companies

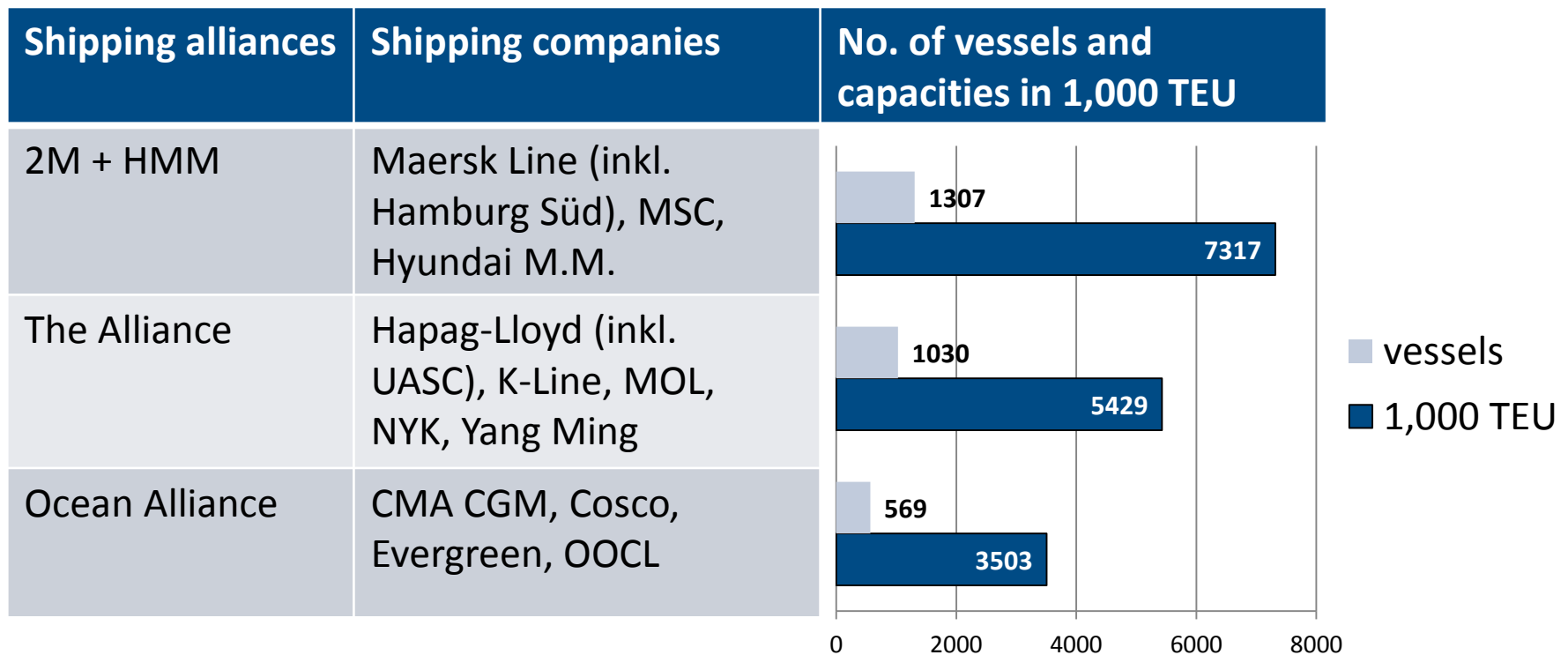


Source: Alphaliner- Top 100

Stand: 4. April 2017

V. GLOBAL NETWORK

3. The worlds largest shipping alliances



Stand: 7. April 2017

Source: www.alphaliner.com/top100/; Alphaliner Weekly Newsletter 07 (2016)

V. GLOBAL NETWORK

4. Liner services to Hamburg (2016)



Source: Hafen Hamburg Marketing e.V., Quartalsbericht und Mitgliederinformationen (4. Quartal 2015)

VI. TRANSHIPMENT AND HINTERLAND TRAFFIC



VI. TRANSHIPMENT AND HINTERLAND TRAFFIC

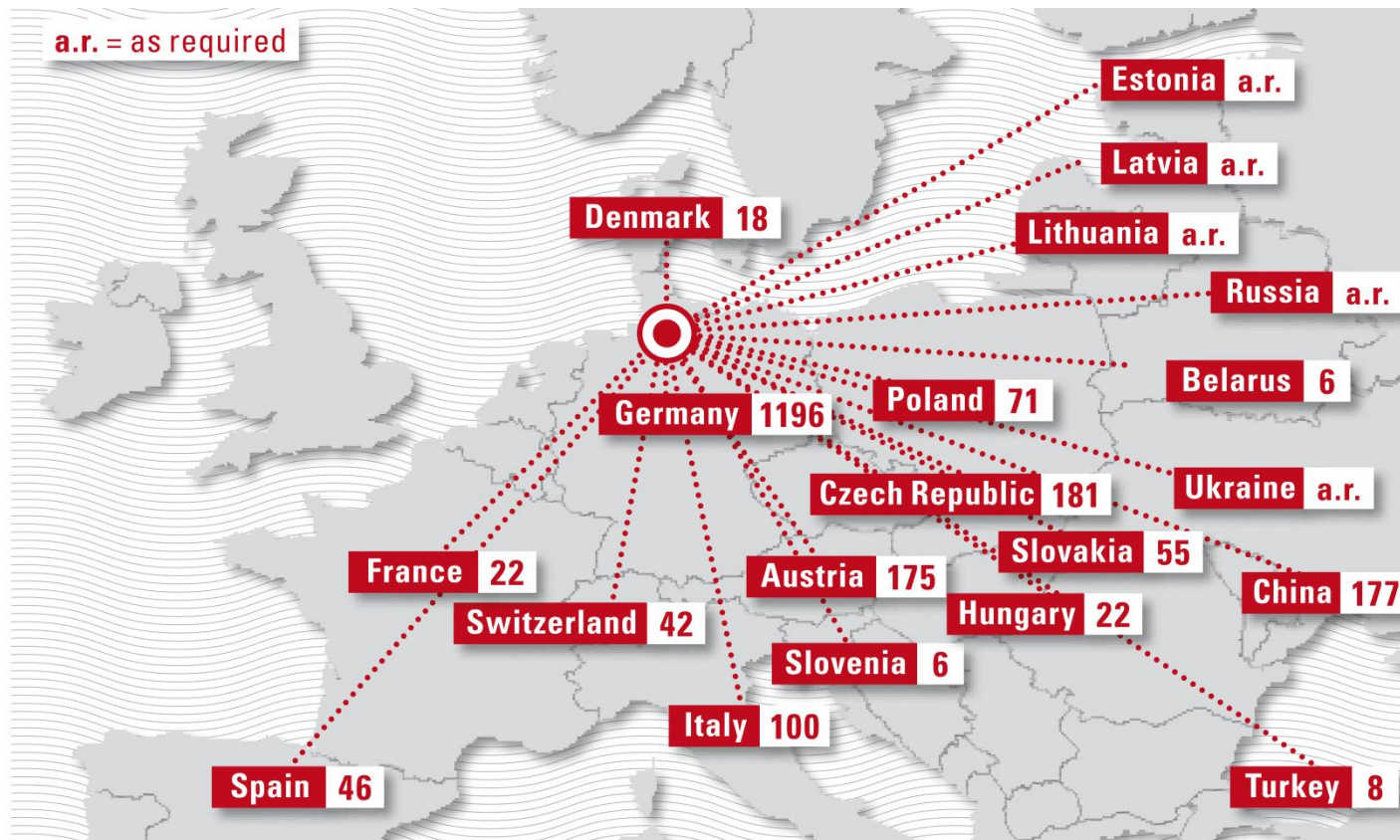
1. Feeder connections of Port of Hamburg (2016)



Source: Hafen Hamburg Marketing e.V.

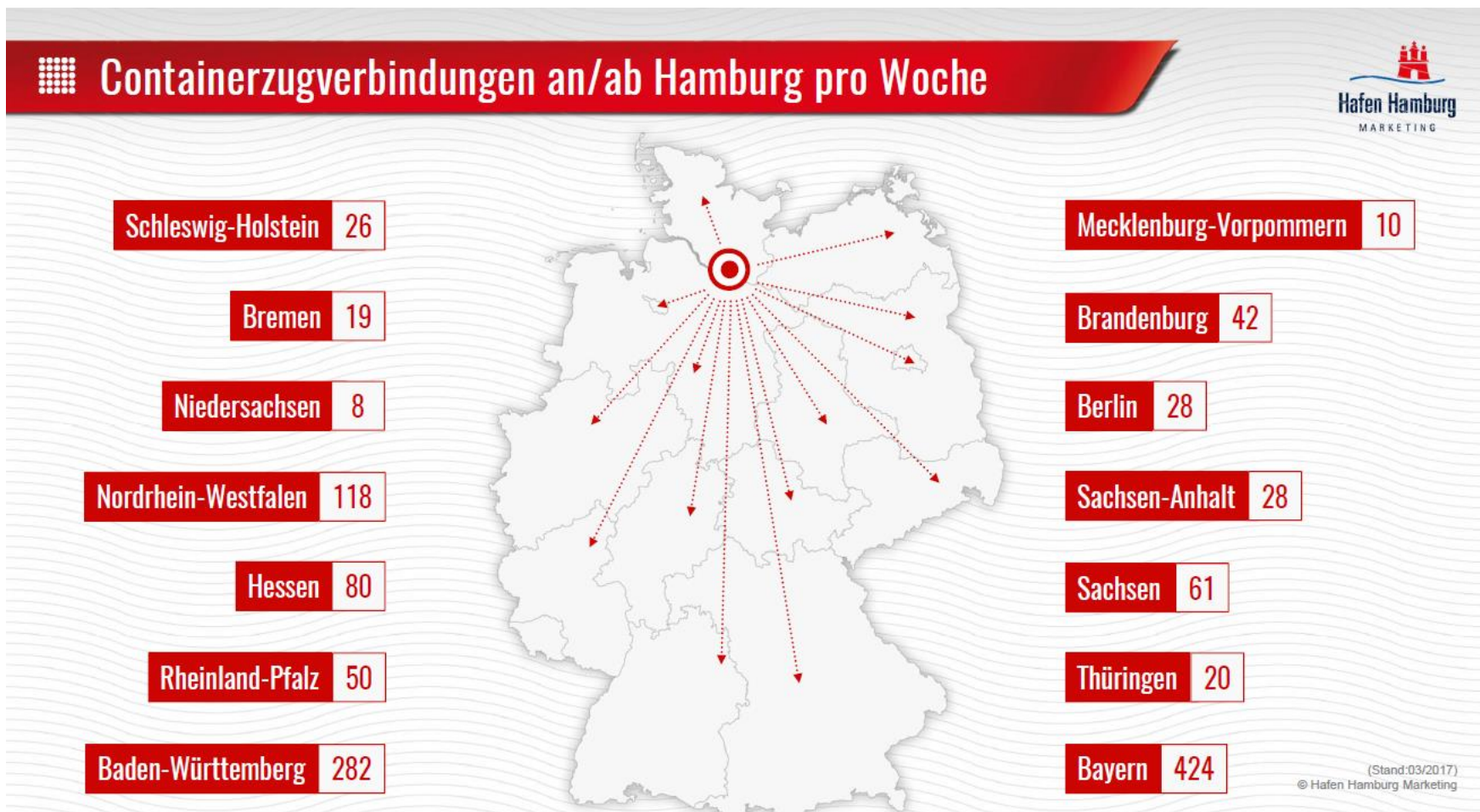
VI. TRANSHIPMENT AND HINTERLAND TRAFFIC

2. Cargo train services from and to Hamburg (03/2017)



VI. TRANSHIPMENT AND HINTERLAND TRAFFIC

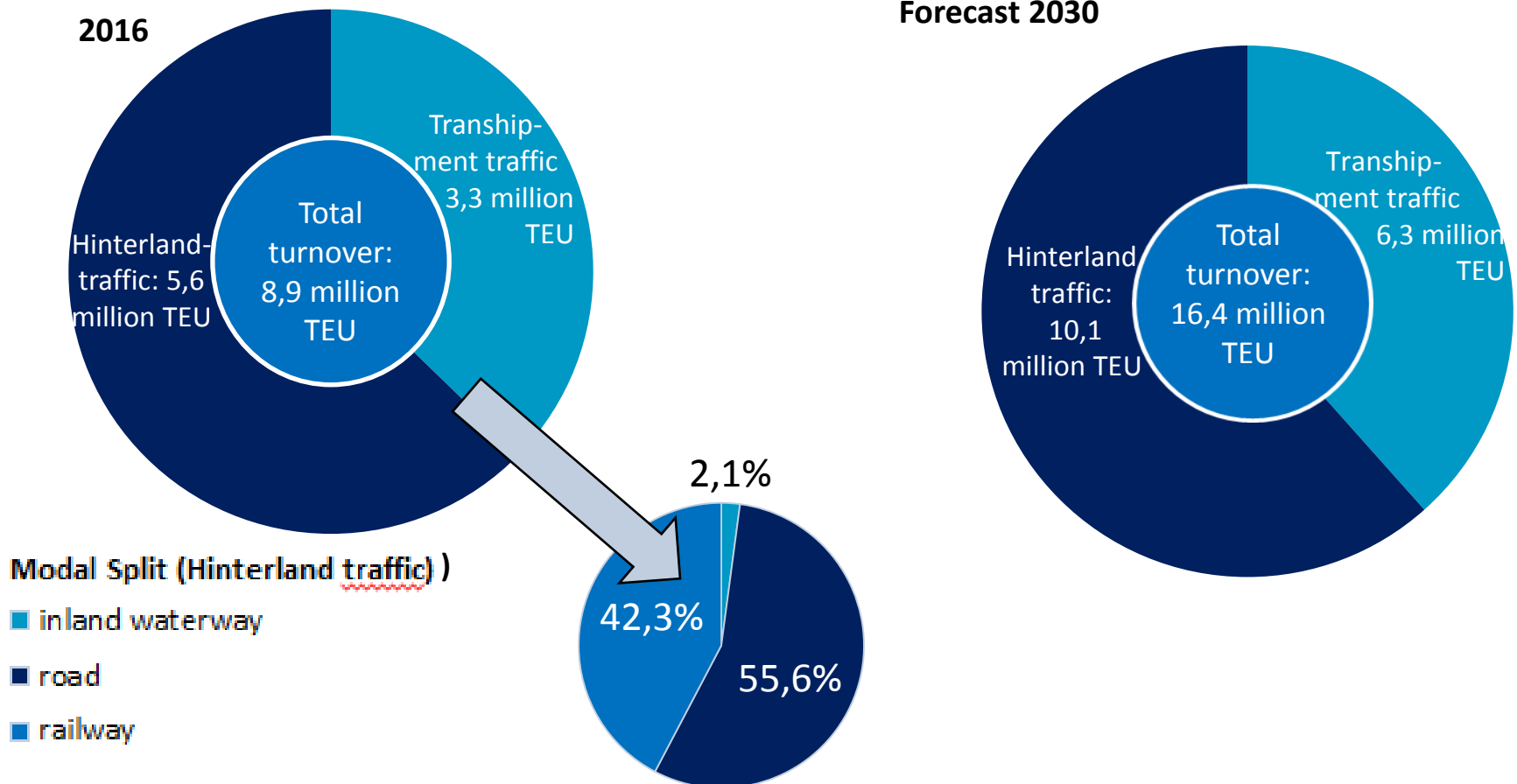
2. Cargo train services within Germany (03/2017)



Source: Hafan Hamburg Marketing e.V.

VI. TRANSHIPMENT AND HINTERLAND TRAFFIC

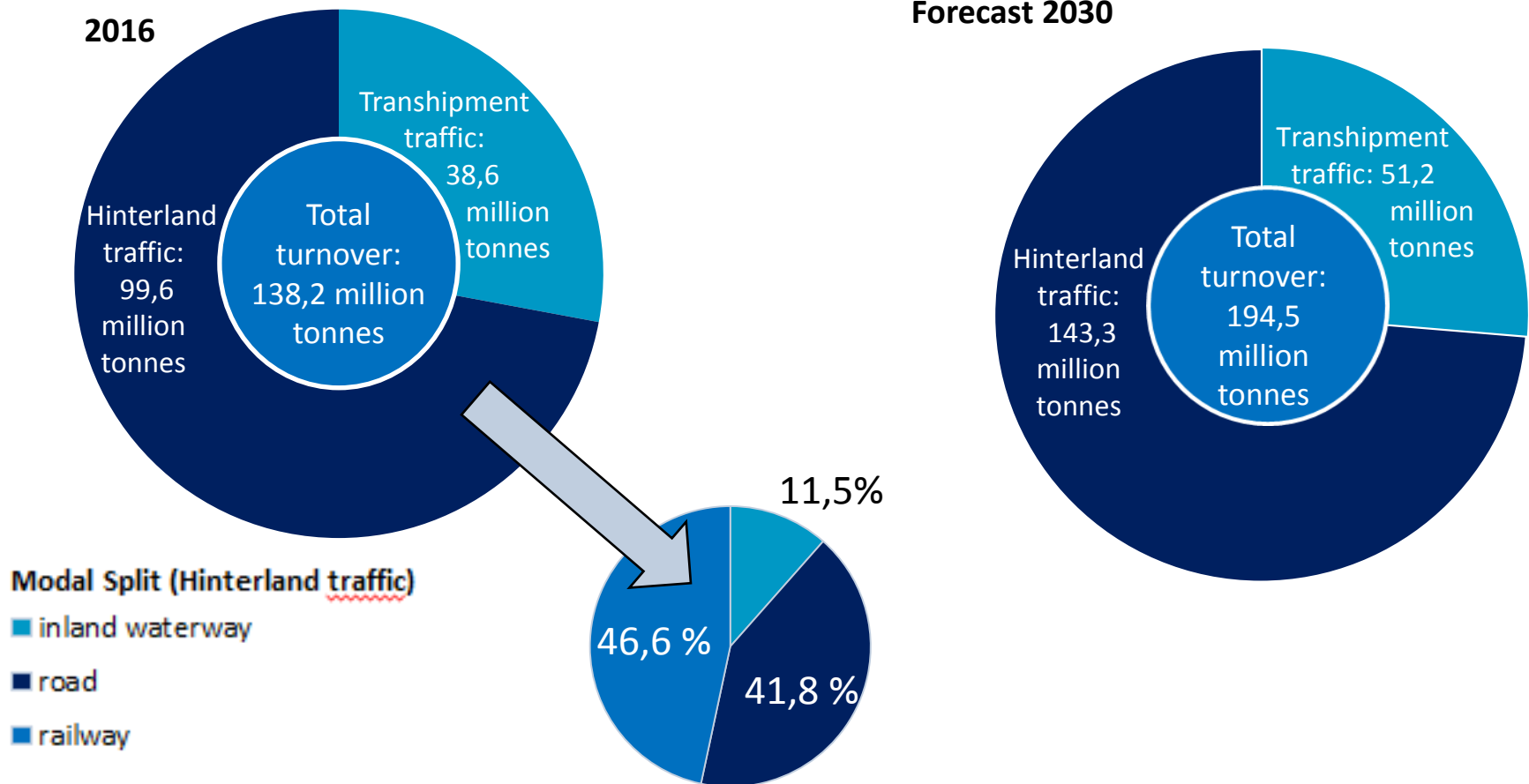
3. Transshipment and Modal Split (hinterland traffic) of Hamburg – Container turnover



Source: Hafen Hamburg Marketing e.V., Bundesministerium für Verkehr und digitale Infrastruktur (BMVI): Seeverkehrsprognose 2030, S. 109

VI. TRANSHIPMENT AND HINTERLAND TRAFFIC

3. Transshipment and Modal Split (hinterland traffic) of Hamburg – Total turnover



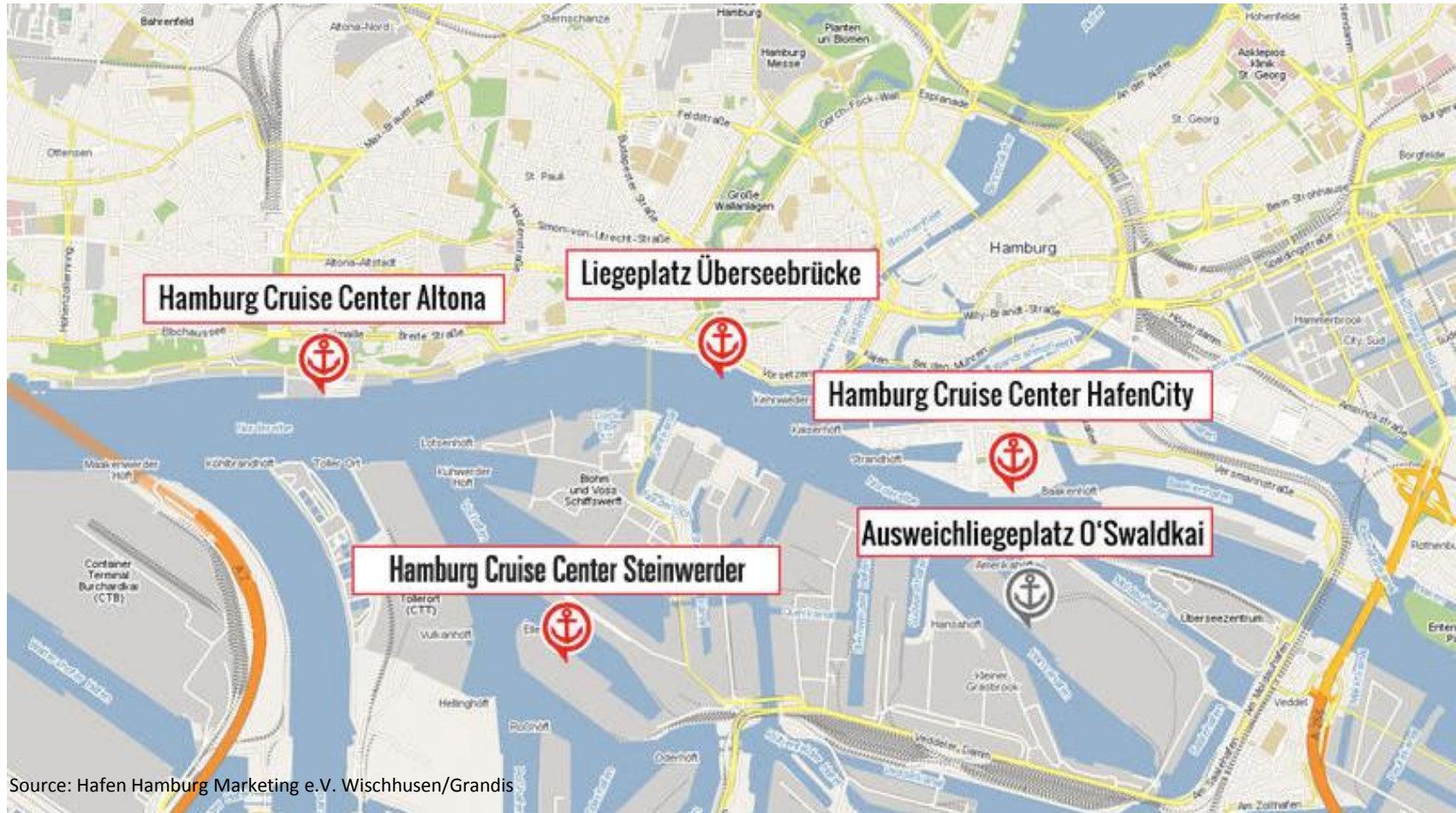
Source: Hafen Hamburg Marketing e.V., Bundesministerium für Verkehr und digitale Infrastruktur (BMVI): Seeverkehrsprognose 2030, Page. 109

VII. HAMBURG AS A CRUISE PORT



VII. HAMBURG AS A CRUISE PORT

1. Overview of the terminals



Source: Hafen Hamburg Marketing e.V. Wischhusen/Grandis

VII. HAMBURG AS A CRUISE PORT

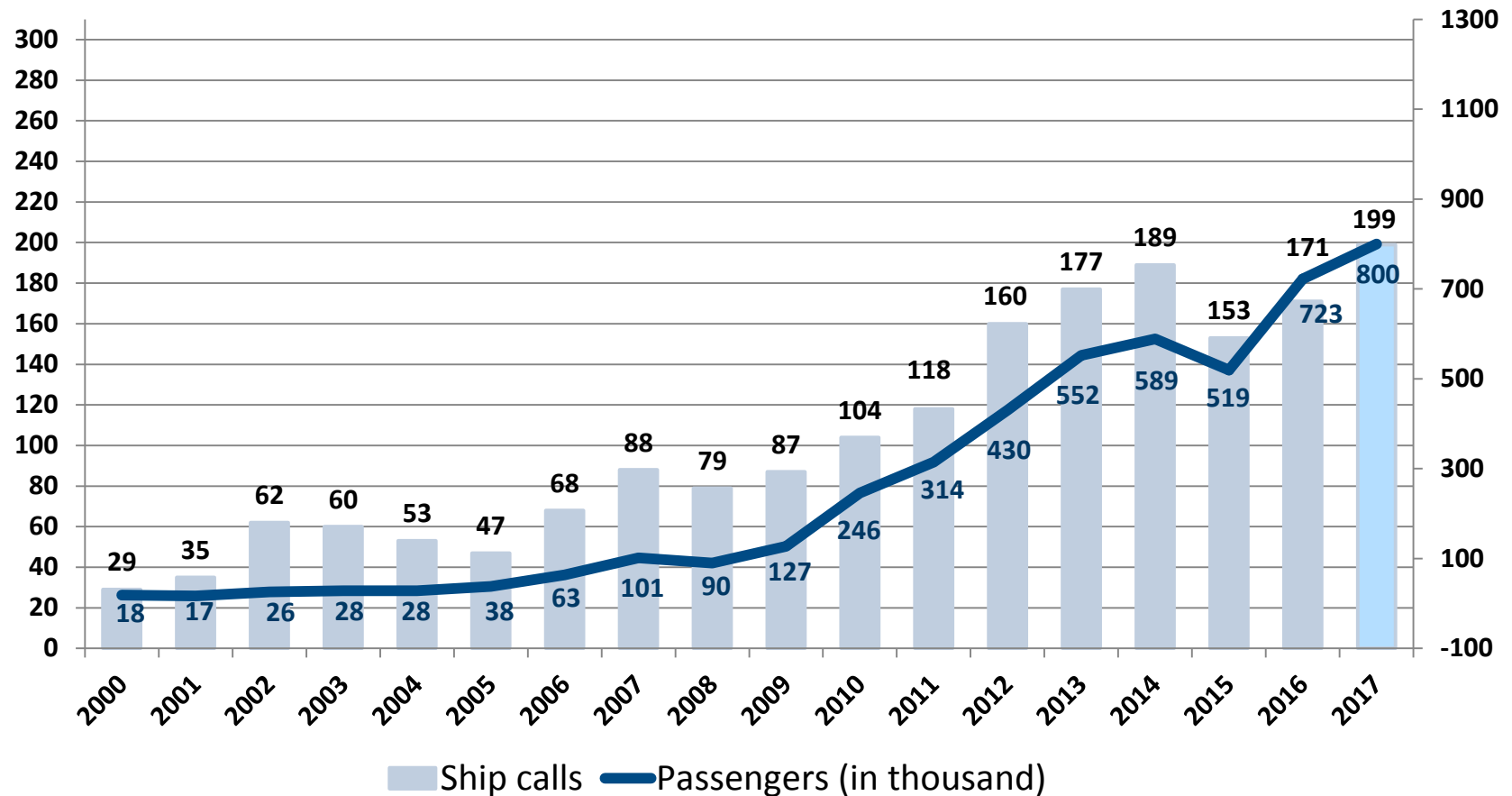
2. Numbers and facts about the cruise terminals

- Cruise Center HafenCity (CC1)
 - 2 berths
 - 345 m length
 - 12 m depth
- Cruise Center Altona (CC2)
 - 1 berth
 - 300 m length
 - 10,5 m depth
- Cruise Center Steinwerder (CC3)
 - 1 berth
 - 350 m length
 - 12 m depth
 - Capacity for over 8000 travellers



VII. HAMBURG AS A CRUISE PORT

3. Development of the ship arrivals and the number of passengers



Source: Hamburg Cruise Center e.V.: Cruise Net Hamburg, Hafen Hamburg Marketing e.V. (Wert für 2017 Prognose)



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THANK YOU VERY MUCH FOR YOUR ATTENTION!

Do you have any questions?

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