



ALARGAR HORIZONTES
SEMINÁRIOS T&N 2015

12 Março
MARÍTIMO

What will change in shipping?

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European Shippers' Council

- Represents Shippers freight transport interests (import and export and intra-continental, by all modes of transport).
- Members are mainly national shipper's council
- The Council represents the vast majority of goods distributed by sea, road, rail, inland waterways and air.
- ESC, based in Brussels, acts as the “eyes and ears” for its member organizations in respect of EU legislative activity.

Missions of the ESC

- To contribute to the competitiveness of the European industrial and trading base whilst underpinning growth, wealth and employment within Europe.
- Committed to foster a highly efficient and environmental sustainable freight transport system both within and outside of Europe, promoting openness and competition in all freight services.

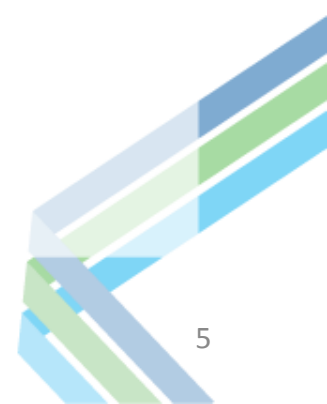
Main challenges

ESC has identified three main challenges for the future :

- Weighing of containers
- Market development and competition
- Sustainability and emissions of maritime transport



WEIGHING OF CONTAINERS

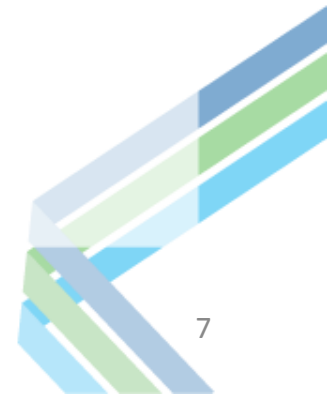


Container weight

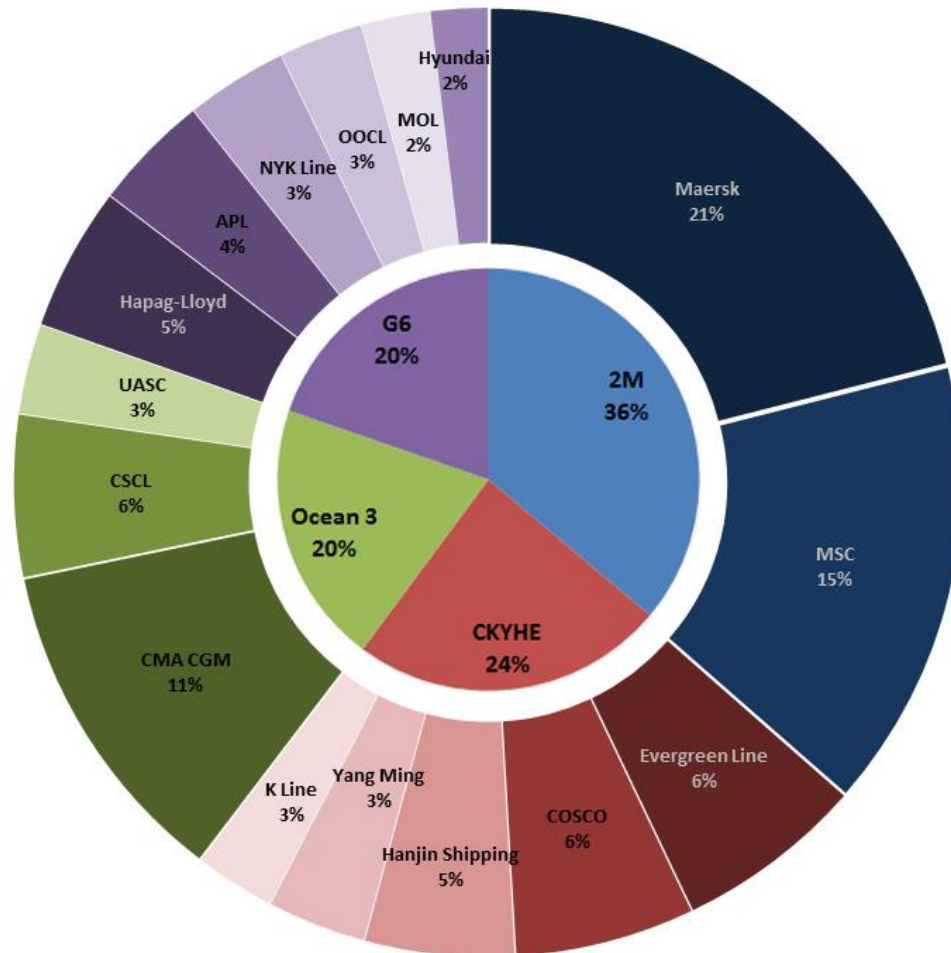
- Reinforcement by IMO of the obligation of total weight declaration everywhere in the world
- Two methods
 - Physically weight to loaded container
 - Calculate the total weight
- Information chain will be crucial
- Tare of the empty container should be under the responsibility of the ship-owner only
- Industry guidelines available
- Already existing certification should be preferred



COMPETITION AND ALLIANCES



Market development and competition will be one major topic for the future

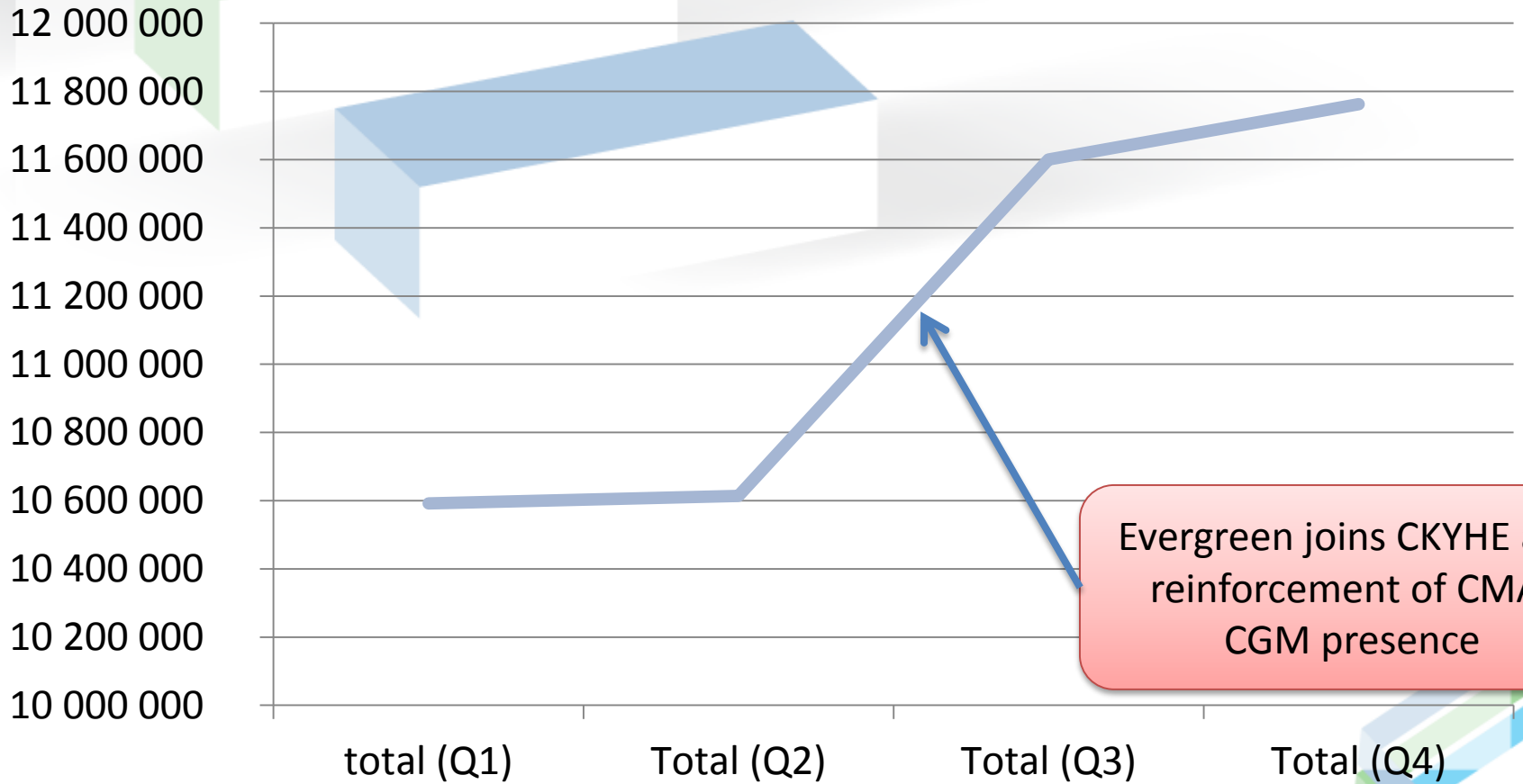


Market development and competition will be one major topic for the future.

- Alliances are huge, while shippers are not consolidated
- There is a clear need for better control on the market
- More cooperation between competition authorities are to be built
- Service and lead-time quality must remain priority

Capacity

Total capacity on the trade in 2014

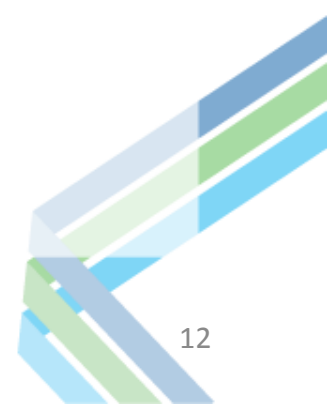


West Med port called analysis

	Q1	Q2	Q3	Q4
Algeciras	7	6	6	6
Barcelona	7	7	7	7
Valencia	12	12	12	11
Fos	5	5	5	5
Cagliari	2	2	2	2
Gioia Tauro	4	4	4	4
Genoa	5	5	5	5
Leghorn	1	1	0	0
Naples	1	1	0	0
Sines	3	3	3	3
La Spezia	6	6	4	4
Taranto	2	2	2	0
Trieste	5	5	5	5
Port Tanger Med	9	10	10	9
Total	69	69	65	61
		0%	-5,8%	-6,2%
			Q1/Q4:	-11,6%



SUSTAINABILITY



Reduction of emission of maritime transport

- Low sulphur regulation
 - Implementation of measure is underway
 - Price of maritime transport will increase as soon as price fuel will start to increase again
 - Risk of modal backshift
 - Unequal competition within EU SECA/non SECA
- CO₂ and MRV
 - European proposal
 - International regulation rather than regional
 - Cost should be monitored





Thank you for your attention

Questions are welcomed!