

fast forward

PROGRESS REPORT WINTER 2004

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ISSUE

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The X Factor



fast forward

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Frozen Fish



From a historical point of view, the main focus of the Dutch fishery sector has always been on fishing itself. But nowadays, fish is also increasingly gaining in importance in terms of global trade. The container plays an important role here. Because how can fish be moved to the other side of the world? By freezing it and moving it in reefers, of course!

Colophon

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Europe Container Terminals (ECT)

ECT is the largest and most advanced container terminal operator in Europe, handling almost three-quarters of all containers in the port of Rotterdam.

Twenty-four hours a day, seven days a week and 52 weeks a year, ECT operates several container handling facilities on the ECT Delta Terminal at the

Maasvlakte along the North Sea and the ECT Home Terminal & ECT Hanno Terminal in the Eemhaven/Waalhaven area, near the city centre. ECT has devel-

oped a network of inland terminals to facilitate better intermodal transport -

barge, rail - between Rotterdam and the European hinterland. Currently, ECT

operates terminals in Venlo (in the southeast of the Netherlands), Willebroek

(Belgium) and Duisburg (Germany). All ECT's terminals inside and outside

Rotterdam are at the crossroads of visible container flows and invisible information flows. ECT's highly skilled staff is on standby 24 hours a day for its customers.

ECT is a member of the Hutchison Port Holdings Group (HPH), the world's leading port investor, developer and operator with interests in seventeen countries

throughout Asia, the Middle East, Africa, Europe and the Americas. Today, HPH operates a total of 206 berths in 35 ports together with a number of transportation related service companies.



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A new service to Dublin and doubled frequencies to Bilbao and Gothenburg. X-Press Container Line is expanding its activities in Rotterdam at a rapid pace. Director Mark Allen: "We focus purely on offering feeder services to deep-sea shipping lines."

Ready for the Next Generation

With the visit of the CSCL Europe in early October, China Shipping is the second shipping company after OOCL to call at our ECT Delta Terminal with vessels of 8000+ TEU. And this is just the tip of the iceberg. Shipyards are giving their fullest to keep up with the surging demand. From 2005, the number of vessels of 8000+ TEU is set to rapidly increase. An important question of course is in which trades the ships will be deployed: the Far East - America trade or the Far East - Europe trade? My money is on Europe ending up with the lion's share.

So, Europe; in any case, we at ECT are ready for it. The location and draft of the ECT Delta Terminal are unrivalled. Our cranes can even handle vessels of 10,000+ TEU without any problems. By implementing our current investment programme, we are in addition quickly creating extra capacity.

It is however clear that the 8000+ TEU vessels will also pose new challenges. Call sizes will further increase. For ECT, this means investments aimed at boosting our productivity even further. In order to do so, the terminal software at the Delta will be completely renewed and will from next year also significantly contribute to this productivity improvement.

Another development that I am anticipating in the wake of the 8000+ TEU vessels is that shipping companies will decide to call at fewer ports. In this way, they can keep the necessary turnaround time for a trip between the Far East and Europe at the current level. The number of containers to be handled at each port will consequently increase even more. The fact that there will be fewer ports of call, however does not mean that the 'old' idea of one or two central hubs will be reintroduced. The ports can differ for each string.

Be that as it may: its location and facilities make the ECT Delta Terminal an excellent option for shipping companies. And what's more, no other European port can boast such a dense network of feeder connections. This is highly important here, because less ports of call means feeders will only gain in importance. The Delta has been fully geared to this. It is not without reason that the first plans for an automated container terminal at the Maasvlakte were initially known under the name MSS: Majority Sea to Sea. This is already quite a while ago. Over the last ten years our handling concept has more than proven itself in practice. Also because of the optimum hinterland connections via train, truck and barge. One cannot stand on one leg. The ECT Delta Terminal offers a comprehensive mix. We gladly welcome the 8000+ TEU vessels!

Wando Boevé
Director Marketing & Sales

Big, Bigger, Biggest



With the arrival of the CSCL Europe the ECT Delta Terminal welcomed a new record-breaking vessel at the beginning of October. This spectacular newcomer in the fleet of China Shipping Container Lines is 334 metres long, 42.8 metres wide and has a massive 8468 TEU capacity. As such it is officially the biggest con-

tainer ship in the world. In total China Shipping is having five of these giants built. Three of them (apart from the CSCL Europe also the CSCL Asia and the CSCL America) are already sailing the world's oceans.

More about China Shipping in the feature on pages 16 - 17.



Land Ho!

The Port of Rotterdam is busily preparing the construction of Maasvlakte 2 in the North Sea. Last summer, an agreement was reached with the national government about the last remaining details. Nothing now stands in the way of the realization of 1000 hectares of new port sites directly situated on deep water. According to the planning, the actual construction is set to commence in 2006. Between 2010 and 2012, the first companies will be able to set up operations at Maasvlakte 2. A substantial part of the land reclamation scheme has been earmarked for deep-sea container handling and connected activities such as distribution.

Artist impression Port of Rotterdam

Unity is Strength

Korean small and medium-sized businesses looking to export to Europe can now turn to the Korean European Distribution Center (KEDC) for their European distribution. KEDC is housed within logistics service provider Geodis Vitesse in the Distripark Eemhaven, opposite the ECT Home Terminal. Through KEDC, Geodis Vitesse offers Korean companies a (standard) solution for the collection of containers from the sea terminals, the warehousing of the cargo and the European distribution. "Value-added logistics activities are naturally

also possible, but these come as an additional option on top of the basic contract," explains Geodis Vitesse's René Boerema. The services offered by KEDC were initiated at the behest of KOTRA, the Korean Trade Investment Promotion Agency. Placing a number of companies with a single logistics service provider enables all parties involved to work more efficiently and cost-effectively. KEDC can offer services to a total of twenty Korean exporters.

Seventy-five Years on Course

This year sees the 75th anniversary of the Central Dutch Office for Rhine and Inland Shipping CBRB - the organisation for employers and businesses involved in inland shipping. Just about every inland shipping operator that visits ECT is a member of this organisation. Consequently the CBRB is an important partner when it comes to making arrangements for the handling of inland shipping containers at the ECT terminals. And with more than a third of all containers handled being transported efficiently and cost-effectively to and from the hinterland by barges, inland shipping is a very important modality for ECT and Rotterdam. This importance is also apparent from the anniversary

congress organised by the CBRB in October. Guests included the crown prince of the Netherlands, Willem-Alexander and the Dutch minister of transport, Karla Peijs. The theme of the congress was Rivers of the World and it was marked by the presentation of a compendious book and the presence of speakers from China and the United States. In his introductory presentation, CBRB chairman Hubert Jan van der Wyck described the great rivers as agents of development and prosperity. "And all that without first having to spend millions on road and rail networks. The rivers are already there, free of congestion and other obstacles."

Loyal Customer

The Malaysia International Shipping Company (MISC) has been an ECT customer for 25 years. In the relatively youthful container business, that's certainly an anniversary worthy of note. MISC now forms part of the Grand Alliance with six (!) weekly services calling at both the Delta and the Home Terminal. Within the Grand Alliance (in partnership with P&O Nedlloyd, Hapag Lloyd, NYK and OOCL) MISC is a small player, supplying four ships, one of which is the Bunga Raya Dua (*see photo*) with a capacity of 3500 TEU. Ruud van der Horst, acting managing director of MISC's Rotterdam office, says that the relatively modest presence is a conscious decision. "MISC is the national shipping line of Malaysia and its major shareholder (62 percent) is the oil company Petronas. Container shipping is seen as important, but it's not the main business. The company's principal focus is on the further growth in energy transport with LNG-, oil- and chemical tankers." But of course those interests aren't mutually exclusive. In 2006 MISC will be bringing two new container ships into service with a capacity of about 7000 TEU.





New China Service

The Lu He is one of the first vessels in shipping company COSCO's new, second scheduled service between China and Northern Europe. This CNEU2-service will gradually become a weekly sailing. Target date for this to be achieved is the first half of 2005. The service will then comprise eight vessels, each with a capacity of around 5600 TEU. COSCO is a customer at the Delta Dedicated North Terminal.

Ready for Action

In the last two editions of Fast Forward, ECT's director of marketing & sales Wando Boevé showed just how fast the capacity expansion at the Delta Terminal was progressing. For this issue, he and photographer Eric Bakker one last time revisited the spot where he was still standing in the sand a good six months ago. The

infrastructure at the site has by now been fully completed. The only thing that remains to be done is the installation of the quay cranes (*also see article pages 18 - 19*). Then, it will just be a matter of plug & play and the south side of the Delta will have three additional cranes covering 200 metres of new quay at its disposal.

April 2004



August 2004



November 2004



Barges Beyond Compare

A new 'world record' in inland shipping: the push-tug barge combination Riad recently loaded 654 TEU for a single journey. Never before has an inland shipping vessel taken on so many containers. The Riad plies the inland waterways between the container terminals of Rotterdam and Antwerp at a brisk pace. Three times a week the push-tug barge combination occupies a night berth at the ECT Delta Terminal before sailing to Antwerp during the day. "The Delta offers us more room at night than during the day," says barge operator WCT-MTA's director Diederik Antvelink of his choice of sailing times. "But of course the most important thing is that our clients - and they're also ECT's clients - find this schedule works well for them." The push-tug barge combination Riad measures some 200 metres in length and is 23 metres wide. Transporting 654 TEU in one trip needn't even be the limit, Antvelink says. "If at some point we needed to load only empty containers, and the conditions are favourable, we could in principle take on 768 TEU."



New Feeder Services

The number of feeder connections from Rotterdam continues to steadily increase. Team Lines, for example, has recently launched a new weekly service to Foynes on the west coast of Ireland. The shipping company maintains the service with the Eco Yasmin, which has a capacity of 319 TEU. In Rotterdam, the ship loads and

discharges at the ECT Delta, the ECT Home and the ECT Hanno Terminal.

Another new feeder service is that of IMCL Inter Marine Container Lines, which offers a direct connection between Rotterdam and the Polish market. IMCL visits the ECT Delta Terminal twice a week and calls at Gdynia and Gdansk in Poland.



New ECT President

The new president of ECT is Jan Westerhoud (photo), who took up his post on November 1. He succeeds Richard Pearson, who held the post ad-interim. Westerhoud comes to ECT from technical services provider GTI.

The next edition of Fast Forward features an extensive introductory interview with the new ECT president.

ECT is constantly looking for new ways to work more efficiently and improve customer service. For this reason the majority of planning activities have recently been concentrated in the Coordination Centre ECT. This new department has the broad overview for an optimal deployment of personnel and equipment, allowing the terminals to concentrate fully on operations.



Planning New Style

Every day at 10.30, the operations managers of the various ECT-terminals and the technical maintenance service gather in building 34, at the far end of the Delta-complex. Top of the agenda: the proposed deployment of resources over the following 24 hours as put forward by the acting supervisor of the Coordination Centre ECT. This supervisor has the big picture and can thus optimise planning. That applies to the deployment of personnel for the whole of ECT - the Delta as well as the Home and Hanno terminals - and the quayside planning of the Delta. In the consultations with the operations managers everyone is briefed and where necessary adjustments are made. Subsequently all go their separate ways to deal with the task in hand. As its name suggests, the Coordination Centre is the lynchpin of the entire process. That's different from the past. Then each terminal within the company carried responsibility for its own planning. But this was inevitably a less than optimal situation as it could theoretically result in a team sitting idle in the Home Terminal canteen in wait for the arrival of a vessel, while the Delta Dedicated North Terminal was desperate for additional workers. That could never happen now. In order to meet the huge

customer demand each resource is deployed to the full.

Delta All in Hand

The new department also takes care of the quayside planning for the entire Delta Terminal - comprising the Delta Dedicated North, Delta Dedicated East, Delta Dedicated West and the Barge Terminal. All ships report to the Coordination Centre ECT; not just the deep-sea vessels but also the feeders and the barges. The planners for all these vessels and the staff planning section are located next to one another in a single room. That makes it easy to co-ordinate arrangements. Every berth that comes free can immediately be filled, and every available team can be dispatched to where it is needed. Should a berth at the regular terminal be unexpectedly occupied, then the Coordination Centre ECT has an overview of possible alternatives. What's more, the Coordination Centre ECT also carries out the ships' planning for all deep-sea vessels at the Delta. This involves determining the exact location of the containers to be loaded and unloaded on the ship (including special cargo and reefers), and organising the crane set up. The ships'

planning for the feeders and inland ships takes place at the terminals themselves.

24-Hour Contact

Supervisor Alex Jansen: "At the Coordination Centre ECT we are working 24/7. Of course we have lots of contact with the shipping lines. That applies in the first instance to our quayside planning for the deep-sea. They have to know exactly when a ship is expecting to arrive, how many containers are involved and any additional requirements - preferably as early as possible. On the basis of the expected arrival of the deep-sea vessels we also make the plans for the feeders (several dozen per week) and the inland barges (around 60 a day). After that we can determine what we'll be needing in terms of staff and cranes over the next twenty-four hours. Here we follow closely the agreements we have made with the customers." For the Coordination Centre ECT it's important to maintain 24-hour contact with the customer. That means that should a problem arise while loading at night, a solution needn't wait till the following day. "Good contact means we can prevent unnecessary delays," says Jansen. "Suppose that a vessel had wanted to sail during the night."

A Race for More Capacity

To capitalise on the enormous volume growth in container handling, ECT has embarked on an accelerated implementation of an ambitious new investment plan for the Delta Terminal. The scheme involves an investment of a hefty 270 million euros in the period to mid-2006. The first effects are already visible, but there's more to come. It has further been decided to recruit an additional 100 new operational staff, over and above the 168 workers already taken on this year.

From December the southern side of the Delta Terminal on the Maasvlakte (Delta Dedicated West and Delta Dedicated East) will boast three additional quay cranes. These cranes will be transferred from the former Delta Multi User Terminal (DMU), which is no longer in use. The cranes will begin their new life here having first undergone a complete modernisation (see article on page 18 - 19). A similarly refitted crane has already been delivered to the Delta Dedicated North Terminal (DDN). And what's more, a further two refitted ex-DMU cranes will be heading to the south side in the first quarter of 2005. All this equipment is once again fully up to standard and can effortlessly handle container vessels of 8000+ TEU.

ECT has also ordered four brand-new cranes from Chinese crane manufacturer ZPMC, for delivery in the fourth quarter of next year. The cranes measure 43 metres high, span 22 rows of containers and are equipped with an intelligent crane cycle, which simplifies the task of the crane driver. ECT's director of operations Jan Gelderland and manager technology and engineering Jan Waas have no difficulty in explaining why ECT picked ZPMC as supplier: "The price-quality ratio is simply very good and the speed of delivery is excellent. We have also taken an option for them to supply another 2 x 2 cranes."

Space for 535,000 Additional Containers

At least as important as the extra cranes is the creation of additional stacking capacity. On the south side of the Delta Terminal nine extra stacking lanes with the associated, four-high Automated Stacking Cranes (ASCs) are now in use. Next, from early December this year, a new stacking lane and ASC will be added every two weeks. Waas: "That process will continue until mid-April 2005. At that time we will have placed nineteen ASCs in total, all from crane builder Kalmar. In combination with the five refitted DMU-

cranes we'll then already be able to handle an additional 535,000 containers annually."

The expansion of the ASC-park won't stop there. From April 2005 ZPMC will also be supplying ASCs. From their first batch of twelve, seven will go to Delta's south side and five to the DDN. In total 28 ASCs will be coming from China before July 2006. The construction of such equipment is new for ZPMC. But as always the control system software will be supplied by Siemens.

Keeping Pace

It almost goes without saying that the pace of successive investments in other new equipment will be equally rapid. Waas: "Between March and June 2005 we will take 34 new Automated Guided Vehicles (AGVs) into use. And at present we're also inviting tenders for the purchase of a further 49." Other purchases include twelve extra Multi Trailer Systems complete with five tractors, for the efficient internal transport of containers on the terminals.

These are scheduled to be taken into use at end-2004. Furthermore an additional eleven straddle carriers will be added in the second quarter of next year.

Another 100 Personnel

Gelderland is pleased that in the first four months of 2005 he will also be able to hire a further 100 staff. These will be over and above the 168 personnel already taken on. "And in expectation of complete new software for the administration and the guidance of the operation of the Delta Terminal (an investment of nearly 32 million euro) we will also keep improving the existing computer system. Thus we will be adapting the AGVs to make them suitable for twin carrying (two containers at a time) and the cranes for twin lifting and dual cycling."

By mid-2006 the whole investment plan should be complete. The Delta Terminal will then have increased its capacity from 2.2 million moves to a whopping 3.5 million moves, an expansion of no less than 60 percent!

Between now and mid-2006, the number of reefer connections at the Delta Terminal will increase from 2436 to 3306.



Fit to Face the Challenges

Volumes are increasing strongly, concludes Pearson whilst leafing through the current statistics of the ECT terminals. "However, we do at times have problems coping with the peaks in the supply of containers. It's testing the system. In view of our enormous investment programme in equipment and labour, I am nonetheless certain that everything will soon be back on track again. We are doing our utmost to ensure that the boxes flow through Rotterdam as smoothly as possible."

The growth in the container business has definitely not come to an end, continues Pearson. "For 2005, Drewry Shipping Consultants indicates an increase in volumes of twelve percent, for 2006 well in advance of nine percent and for 2007, the growth will still amount to more than seven percent. For the following two years, the growth percentage is expected to be only slightly less."

Further Expansion

Pearson has no doubt that the current investment plans of ECT will be sufficient to meet market demand until the Euromax Terminal at the north side of the current Maasvlakte comes on stream at the end of 2007. The next possibility for expansion will be Maasvlakte 2. The first thing Pearson says about the port of Rotterdam's planned land reclamation scheme in the North Sea is that it is going to be expensive. "But our flags will also be flying at Maasvlakte 2." He then proceeds to express his substantial concern about the differences between the European countries in terms of government support for creating additional port capacity. "The so-called common European market is not that common in this respect." According to Pearson, the UK is in the worst position regarding level playing fields. UK ports are even expected to co-finance the construction of road and rail infrastructure, in some cases up to 200 kilometres away from the port. But of the ports on the continent, Rotterdam is the one that imposes the highest infrastructure charges on port operators. "This definitely puts us in a disadvantaged position. I continuously discuss this matter with the Rotterdam port authority and with the National Government and will continue to do so until the day I retire. I will continue to push for the creation of a level playing field."

A Wealth of Opportunities

Looking back at his past period as ECT president, Pearson refers to himself as part of a team. "I feel that the senior executives and the management team have all done an excellent job in implementing the planned changes. Everything took place on time and in line with the set objectives. We are now beginning to reap the benefits at ECT. We have emerged from the necessary process of change as a much leaner company and we are fit to face the challenges ahead. Europe still offers a wealth of

opportunities, especially as a result of the expansion of the European Union (EU)."

Some of the challenges closer to home according to Pearson are ECT's desired involvement in a broad implementation of a good hinterland strategy for Rotterdam and in the port community system developed by Port infolink. About the latter, he says: "It has to be brought far more into the commercial field. In addition to the exchange of data, it should also be used as a trading platform for booking containers by road, rail and barge. In fact, the port community system should be part of the hinterland strategy. It is another way in which we can boost Rotterdam's competitive position." Pearson also stresses the importance of having good connections and networks: "The hinterland infrastructure bottleneck is fast becoming the biggest obstacle to worldwide trade and trade growth. That is where the competition will take place."

Of course, it is now primarily up to Pearson's successor Jan Westerhoud to further shape these kinds of challenges. "I wish him all the best in that. He has the full support of the management board. I will of course remain involved, but no longer on a day-to-day basis."

"Where will ECT be in two years' time? I think that we will continue to grow, that we will start to see the benefits of our current expansion programmes and that we will be enjoying the benefits of the modernisation of the IT system; the latter will significantly speed up the entire terminal operations at the Delta. And as far as the Home and Hanno Terminal are concerned: there will always be customers who want to be handled closer to the city. We will be ready to fulfil their needs."

Dealing with the Dutch

After having experienced ECT from within for two and half years, the New Zealander Pearson knows what it is like to deal with the Dutch. "As a trading community, it is very similar to Hong Kong. Trade is something that comes naturally to the Dutch. I am impressed with the speed at which change can be implemented. Once there is a consensus, things go quickly - although at the beginning of my time at ECT, I found the consensus-building process rather unique! Regarding doing business, the Netherlands surely must be one of the major supporters of EU principles, with an openness to trade and foreign investment, perhaps as a result of its location in the middle of the EU."

Pearson cannot really come up with anything negative about the Netherlands. "I even appreciate the fact that the business lunches are very simple and fast." He does, however have one observation: "The Dutch need to understand that to make a decent cup of tea you need boiling water. Using water that has been sitting in a thermos for hours simply won't do!"

For about two and a half years, Richard Pearson was president of ECT. 'A temporary arrangement', as he himself puts it. With the appointment of Jan Westerhoud as the stevedore's new CEO, Pearson will therefore be returning to the other challenges that await him as director of the European branch of Hutchison Port Holdings. But not before reflecting upon his past period at ECT and especially upon the company's future. "We have emerged from the process of change as a much leaner company."



"Europe offers a wealth of opportunities, especially as a result of the expansion of the European Union."

The Secret of the *No Fuss*

More and more trucks are visiting the Delta Terminal. Despite the growing volume, the handling process has become ever more efficient and drivers are getting back on the road in record times. How this is possible? The Cargo Card, more and better pre-notification, an automatic gate, D-I-Y counters and the deployment of additional personnel at peak times do the job.

An average of 10,000 drivers report to the desk on the forecourt of the Delta Terminal each week. Here the administrative work for the delivery and collection of some 14,000 to 15,000 containers takes place. And it's only getting busier. Supervisor of the Gate Administration Desk (GAD), Jan Nederpelt: "At the entrance of our administration building drivers take a number; 90 percent do this by presenting their Cargo Card identity pass. Drivers who hold a Cargo Card and who's containers have also been pre-notified by their trucking company are off again quickest."

Once the driver has reported to the counter (average time spent here is 200 seconds) and all his papers are in order, he receives a key card and collects a route map for the terminal. At all the checkpoints (customs, gate in, landside interchange points for loading/unloading, gate out) the driver scans this terminal pass. The sequence is fixed and if a mistake is made he is sent back. As such the key card ensures the proper route is taken.

Furthermore, the minute the driver first scans his key card at the gate in, the relevant terminal - Delta Dedicated North, Delta Dedicated East or Delta Dedicated West - is automatically notified of his approach. A container to be collected can be immediately removed from the automatic stack, so that by the time the driver arrives at the indicated interchange point the box is ready and waiting. Depending on the number of containers to be delivered or collected, a



driver's stay at the terminal on average lasts just about half an hour.

D-I-Y Counters

Volumes at the landside are rapidly increasing. "We cope with this by putting on more staff at the desk, the gate and the landside of the sea terminals during the peak times - that's mornings from 4.30 to 7.30 am and afternoons after 15.00. That way we can cut waiting times to a minimum. Up until Autumn 2005 we will also be able to use the stack of the former Delta Multi User Terminal as an extra buffer," says landside operations manager Michel Maas. But that's not all. Maas: "We are now doing a test with five unmanned Do-It-Yourself counters. These allow drivers to enter their own details for collecting containers. If the trial is successful we will increase the number of D-I-Y counters to ten or fifteen and we will extend cover to container deliveries. A project we're considering for the future is that ECT staff go outside to help drivers in the cabins of their trucks on the parking lot, using hand-held computers." A separate project is the automatic gate, adds Nederpelt. While the truck drives through the gate at a speed of

Reliability

Truck driver Gerard Pols of Pols Vervoer: "Certainly, in comparison with other container terminals that I visit, things go a lot quicker here. But more important perhaps is that the Delta Terminal gives you such a degree of certainty that you can plan the rest of your day around it."

Truck Stop



A driver's stay at the terminal on average lasts just about half an hour.

twenty kilometres per hour, several digital cameras scan the container for damage, container number and IMO-label. On the ECT Home Terminal this system is already running perfectly and a trial will begin shortly at the Delta.

Correct Pre-notification

Capacity and speed can be further increased by encouraging and optimising the pre-notification of containers, says Maas. "ECT is working on this together with the trucking companies. It's just as important for them as for us. At the moment just a quarter of all pre-notifications are accurate. The details of one party - the shipping line - must match those of the other party, the haulier, and that's not always the case. We can make a big improvement in quality there. That said, we're encountering fewer and fewer real problems. And when a problem does arise, there's always our troubleshooting desk on hand to find a solution."

Does Nothing Ever go Wrong?

"We haven't had any major system breakdowns for a long time," says Maas. "Very occasionally a driver takes

his truck to the wrong block. If nobody at the stack notices the slip-up, this can lead to the wrong container being put on the truck. But incorrect containers have never made it through our exit checkpoint, which is partly automated and partly manually operated. Then they get sent back."

The expanding Gate Administration Desk currently has a staff of 110. "For the foreseeable future our capacity for handling trucks won't pose any problem," says Nederpelt. "Compared to seven years ago the atmosphere in the administration building with all the drivers has greatly improved. It's a good feeling when you're working well and your efforts are appreciated."

'World Record'

Jan Nederpelt: "Two months ago - admittedly it was in the middle of the night, but even so - the time between the unloading of one container from the ship to the time it left the gate on its truck amounted to just eight minutes. Our system makes that possible."

A man in a dark suit and light blue shirt is sitting on a large pile of waste paper. The background is a massive, colorful pile of crumpled and shredded paper, creating a textured, abstract wall of white, blue, and yellow. The man is looking directly at the camera with a slight smile.

The Flourishing Export of Waste Paper to China

Rotterdam welcomes Paper Work

60 Different Kinds Of Waste Paper

The best paper fibre is made from wood pulp, but waste paper is also a raw material for paper and cardboard. Paper fibres can on average be recycled six times. After that, the fibres are too short. There are as many as 60 different kinds and gradations of waste paper with corresponding prices and applications. The collection of paper is the most worthwhile in regions that are economically prospering and have a high population density. In Germany and the Netherlands, for example, 70 to 75 percent of all used paper is collected again.



The demand from China for waste paper as a raw material for new paper and cardboard is huge. All the products from 'the workshop of the world' after all need to be packaged. And the increasing level of prosperity in China itself has also boosted the demand for luxury and sanitary paper. Last year, China imported 425,000 40-ft containers filled with waste paper. The Dutch company Ciparo/Aim Reclaim is responsible for about 8000 of those boxes.

It seems a long time ago that China was still a developing country. But at the end of the eighties and in the early nineties, there was already a substantial demand for waste paper in China. During Mao's reign, all the forests in the country were cut down. Consequently, wood fibres needed to be imported for the production of paper. The fact that the collection of waste paper became structurally embedded in densely populated western countries some twenty years ago was therefore quite convenient. Initially, the practice of paper recycling resulted in mountains of excess waste paper that were sold to Chinese paper plants at giveaway prices. An additional advantage was that this coincided with the repositioning of containers from the west to the Far East. An advantage that is still highly relevant today.

8000 Containers a Year

Otherwise, the situation has changed drastically. Now, China is the workshop of the world and the demand for packaging materials has soared. In 2000, China imported 3.7 million tons of old paper. In 2003, this had however already increased to 9.4 million tons, moved in 425,000 40-ft containers. Of this volume, 5.8 million tons came from the US, 1 million tons from Japan and 1.75 million tons from Western Europe (The Netherlands, Belgium, France, Germany and the UK).

For more than twelve years now, Rotterdam-based Ciparo (also known as Aim Reclaim) has been purchasing waste paper in western countries and in Japan. Via four sales offices in the Chinese cities of Beijing, Tianjin, Shanghai and Guangzhou, the company sells this waste paper to Chinese paper factories. Managing director Joris de Caluwe: "From our purchasing office in Rotterdam we acquire waste paper throughout Europe, but also rejected parties, sanitary paper and plastics. A contract for waste paper typically involves a thousand tons at a time, which equals fourty 40-ft containers. Each month, we handle about 15,000 to 20,000 tons. This means 600 to 800 containers, or about 8000 containers a year. A significant part of this is moved via Rotterdam."

In the past, the price of waste paper would often strongly fluctuate. De Caluwe however says that there is a worldwide shortage of paper fibres at the moment. This has had a stabilizing effect on prices. "Ten to fifteen years ago, the Chinese used the strategy to alternatively purchase in America and Europe. In this way, they were able to play parties off against each other and this resulted in

vast price fluctuations. In terms of percentage, more and more waste paper is being collected nowadays. But in absolute terms, the tonnage is declining. The worldwide recession for example means that newspapers have become thinner. Also, packaging is increasingly taking place more effectively due to packaging covenants. The demand for paper fibres however is so substantial that we are now purchasing everywhere, even in Australia."

Freight Costs

Due to the imbalance in container transport between China and Europe, the freight costs for waste paper are low. However, these costs can still mount up. The value of the euro in relation to the US dollar plays a role, as do the bunker surcharge due to the oil prices and the terrorism surcharge. De Caluwe: "In this trade, it is important to be very alert; details can make the difference." In the last fifteen years, the trade has also become considerably more professional. According to De Caluwe, legislation has become stricter. The purchasers of Ciparo regularly visit their suppliers to assess the quality. De Caluwe: "After all, we are active in the field of recycling. It is important that the materials we purchase do not contain any other substances. Our company is ISO-certified and we carefully see to it that our suppliers operate according to similar quality standards."

Logistics

Ciparo arranges the transports, in which the suppliers in most cases collect the containers themselves and deliver them to ECT (FAS = free alongside ship). Ciparo also uses forwarders to collect the paper (ex. works). De Caluwe: "We book the containers, set the closing time in consultation with the shipping company and take care of the customs formalities. ECT puts the containers aboard the ship. This works fine, they obviously know how to do this on time. And the hinterland connections from Rotterdam are also good. The containers from the Netherlands are usually moved by truck. If we procure any waste paper from abroad (usually large consignments), we also use barges or trains."

Once in China, the customs formalities can take up quite some time. De Caluwe: "Two of my partners, who are fluent in Mandarin, work in China. It is not always easy doing business there. The human factor plays a huge role. We started out as small-time traders and perhaps that was a good thing. Because our company developed gradually, our risks always remained quite limited."

The Rapid Growth of China Shipping Container Lines

BOOMing Business

China Shipping Container Lines (CSCL) is not even eight years old and currently already ranks tenth on the global list of large container shipping companies. There is no denying that the company has developed very rapidly. And it is highly likely that CSCL's growth will further accelerate, explains Mr. Yu Zenggang, president of China Shipping Europe.

"We launched our first weekly service between the Far East and Northern Europe in 1999 using ships of 1500 TEU. In 2001, we progressed to 2500 TEU vessels, followed by 4000 TEU vessels in 2002. Last year, we started using 5600 TEU ships and this year we have launched a second weekly service. In one of the services, 5600 TEU vessels are deployed; in the other, we use a combination of both 5600 TEU and 8500 TEU vessels." Yu Zenggang, president of China Shipping Europe, with this enumeration immediately makes clear just how fast the shipping company has developed since its establishment in 1997. The 8500 TEU vessels referred to by Yu are part of a series of five new acquisitions that are currently being brought into service (*see news item on page 4*). "We have in addition placed an order for five 9500 TEU ships, the first of which will be delivered in February 2006. Furthermore, we have ordered an additional five vessels of 8500 TEU." It is abundantly clear: China Shipping is growing and growing. "At the end of this year, the combined capacity of our ships will amount to 250,000 TEU; in 2006, this will be 430,000 TEU. We will then operate a fleet comprising about 110 vessels," says Yu.

West and South Germany via Rotterdam

From the company's European headquarters in Hamburg, Yu Zenggang is responsible for all of China Shipping's activities in Europe in terms of operations, marketing and the pricing of containers bound for the Far East. Local own offices in Antwerp, Rotterdam and

the UK focus on the everyday activities surrounding the calls of the ships. Rotterdam is an important port to China Shipping. In addition to the two weekly Far East services (AEX1 and AEX2), the joint Round-The-World service of China Shipping, Norasia and ZIM also calls here. The shipping company is in addition contemplating the launch of its own transatlantic service, possibly in 2005. Yu: "Besides the Netherlands, we predominantly also serve the western and southern part of Germany via Rotterdam." For the transport over land, China Shipping makes use of the services of well-known forwarders. Although Yu is satisfied with this, he does not rule out that the shipping company will take some of these activities into its own hands. In the next two years or so, this will however definitely not be the case for feeder traffic. "The prices for chartering or purchasing own feeder vessels are simply too high at the moment. And I do not expect this to change in the near future."

Good Cooperation

The European president praises the ECT Delta Terminal's modern technology, its efficiency and especially also its situation directly on the North Sea. "This saves us time, because there are no long passages up and down the river." But China Shipping too has noticed the effects of the huge surge in container volumes that recently took place at the terminal. In view of the rapid investments that ECT is currently making in equipment and personnel, Yu however is fully confi-



The 8500 TEU CSCL Europe is part of a series of five new acquisitions.

dent about the near future. "I expect the service at ECT to be back at the old level between now and two months. We simply need each other as shipping company and terminal; you have to be able to rely on each other."

Continuous investments are absolutely necessary for this, as volumes will continue to go up no matter what. "Between January and August of 2004, we have moved eighteen percent more cargo, both inbound and outbound. We also expect a growth of nearly twenty percent in 2005. And 2006 will probably not be much different." Yu does not yet disclose how China Shipping will move those extra containers between Europe and the Far East. One option would be the deployment of larger vessels; another possibility would be the introduction of a third weekly service.

Yu at present still refers to the efficiency of the terminals in Northern Europe as OK, even though the productivity in the Chinese ports is much higher. "The terminals in Europe handle 70 to 80 containers an hour using three of four cranes, with an occasional peak to 90. This is acceptable to us. In China, handling however takes place using five cranes and at an hourly rate of 120, 130 or even 150 containers." The reasons behind this difference in numbers between Europe and China are simple. "Chinese ports are often quite new and have the latest equipment. In addition, the supply of labour is very considerable in China. There are many people doing the job."

Yu Zenggang: "The situation of the ECT Delta Terminal directly on the North Sea saves us time, because there are no long passages up and down the river."



Photography Mathias Juschke

Substantial Chinese Network

Yu does not expect the rapid growth of the Chinese economy to subside in the near future. Foreign trade is very important in this respect. And it is clear that China Shipping aims to play a prominent role in this global transport. The European president mentions four points on which the shipping company stands out: "We use state-of-the-art equipment. On average, our ships and containers are 1.5 years old. In addition, our sailing schedules are very reliable. Furthermore, we are a low-cost company. We purchased many of our vessels just before the major boom in the ordering of ships. And of course, the cost of labour is very low in China." But the fourth point mentioned by Yu is perhaps the most important one: "We have a substantial network in China with offices in all the ports and cities that matter. With the exception of COSCO, this is something that no other company can claim."

Five quay cranes of the former Delta Multi User Terminal will be given a new lease on life. An extensive process of modernisation, heightening and lengthening will soon make the cranes suitable for handling the largest ships that are currently navigating the world seas. The upgrade operation is a true (technological) tour de force. And the next challenge is already waiting: the refurbishment of seven cranes at the Delta Dedicated North Terminal.

Unique Upgrade for Twelve Quay Cranes

Playing with the BIG BOYS

“Once we are finished, the cranes will easily last another ten years.” As project manager infrastructure & equipment, ECT’s Wim Reuvers bears responsibility for the upgrade operation of the five remaining quay cranes of the former Delta Multi User Terminal (DMU) at the Maasvlakte. Since the handling of containers was discontinued at the conventional DMU in 2000, the cranes have just been idly standing on the quay. The original plan to sell them was abandoned due to the explosive growth in container volumes. Instead, ECT has decided to give the quay cranes a new lease on life. With that, the stevedore will in a short time have relatively cheap additional handling capacity at its disposal (*see article page 9*).

Three of the five cranes will be relocated to the south side of the Delta complex in December; the remaining two will follow in April 2005. At the moment of relocation, the cranes will have been heightened by eight metres, lengthened by six metres and strengthened at all strategic points. In addition, the electronic system will have been renewed and an automatic anti-sway system will have been installed. This anti-sway system enables the cranes to hover directly above an Automated Guided Vehicle (AGV) without swinging back and forth. The cranes will have also been fitted with a stacker platform located thirteen metres above the quay. This is where the seal inspections will take place and the twistlocks of containers will be put on and removed. Reuvers: “Those stacker platforms will make the crane cycle shorter, but will especially also improve working conditions. Our people will no longer need to work in the exhaust fumes of the AGVs.”

Longer and Higher

The most spectacular part of the renewal operation is without a doubt the heightening and lengthening of the cranes. In order to increase the length of the crane jib by six metres, 2.5 metres are first removed. This takes place with the crane jib horizontally suspended above the water. During this operation, the segment to be

removed hangs in a floating sheerlegs crane. The lengthening itself takes place on the ground. Once finished, the floating sheerlegs crane is again used to reattach the steel construction to its location at the end of the crane. Increasing the height of the quay crane is a whole different story. The legs of the crane are cut off at the spot where the new stacker platform will be located. Then, the top half of the crane is raised 8.6 metres using hoisting equipment. This makes it possible to (in phases) insert eight metres of steel between the two parts. Reuvers: “By opting for this specific spot to insert the extension, the stacker platform also helps to increase the stability of the crane.” Once completed, the five DMU cranes will be 38 metres tall under the spreader. The reach of the crane jib will span eighteen rows of containers wide. The cranes will therefore easily be able to handle ships of 8000+ TEU.

A separate challenge is the transport of the quay cranes to their new workplaces at the south side of the Delta. The first step is placing a crane on platform wagons that combined have a total of 360 wheels. Then, a six-hour, two-kilometre-long journey across the terminal site follows. Reuvers: “At the Delta Dedicated West Terminal, we will en route need to pass two stacking lanes, which we will fully clear for this. In addition, we will lay down three kilometres of special steel plates, so that the quay crane will not sink through the road surface. But once a crane is at its location, it is only a matter of plug & play.”

Next Challenge

After the refurbishment of the last DMU crane has been completed in April 2005, the next challenge will already be waiting at the Delta Dedicated North Terminal (DDN). Seven quay cranes at the DDN will be heightened by eight metres (up to 40 metres under the spreader) and extended by four metres (up to eighteen rows of containers wide). Oscar Ehrlich is the project manager at ECT. “An additional challenge is that all operations at the DDN must of course be able



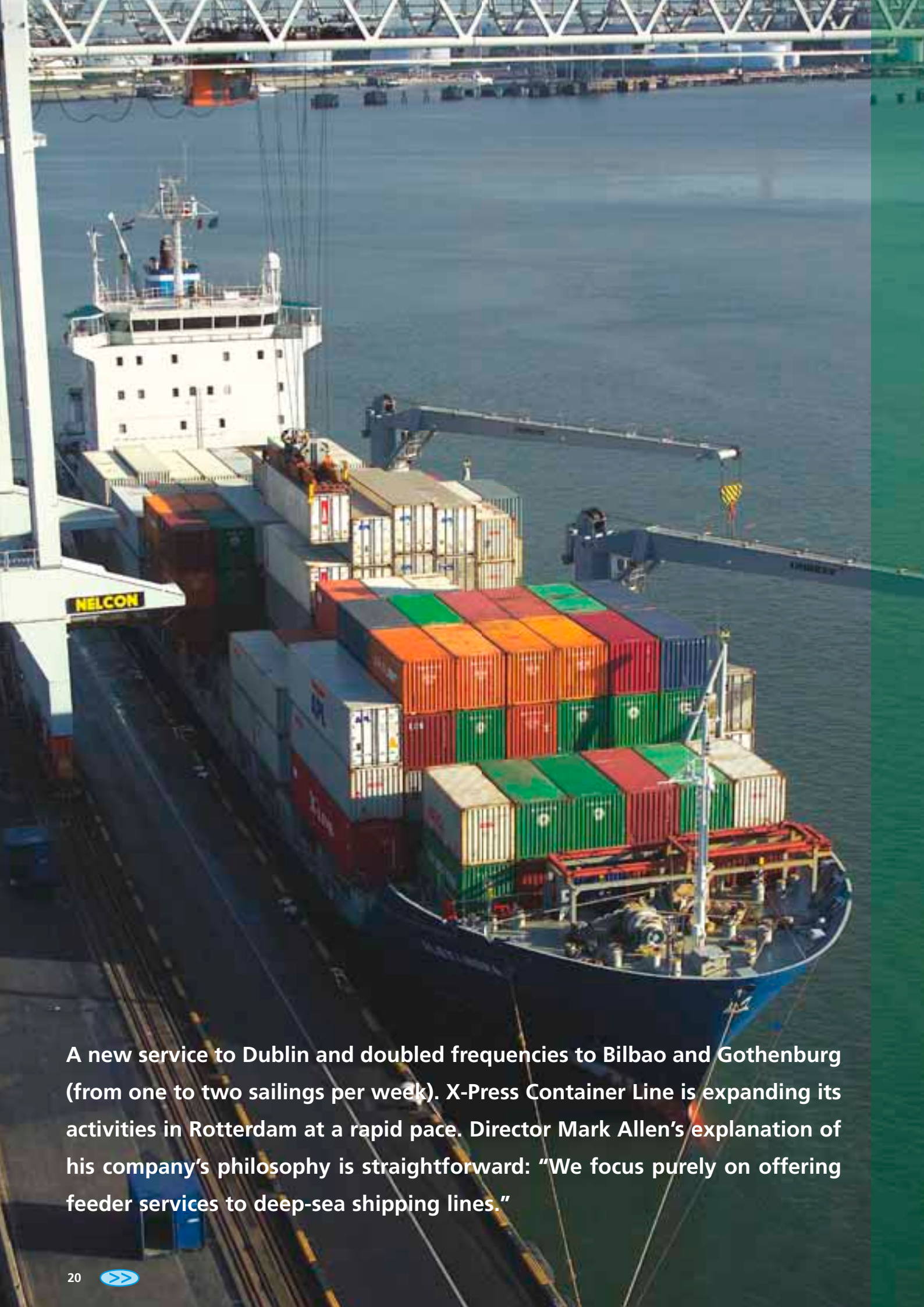
Crane 21 Already Operational

In advance of the modernisation of the twelve quay cranes, a first quay crane was moved from the Delta Multi User Terminal to the Delta Dedicated North Terminal this autumn. Because this 'new' crane 21 was already extended and heightened a number of years ago, the adjustments could this time be 'limited' to the renewal of the electronic system and the addition of an automatic anti-sway system and a stacker platform.

to continue without any interruptions. That is why we are upgrading the cranes one at a time. At the far end of the DDN, we will create a separate working area, which will result in a minimal degree of disruption." The first crane to be targeted (no. 28) normally already stands in that corner anyway. However, a meticulous planning will need to be drawn up for the next cranes that have been earmarked for an upgrade. Ehrlich: "After no. 28, we will focus on crane 25. To transport this crane to the

working area, it will first need to be lifted off the rails onto platform wagons, be rotated a quarter and transported a short distance into the stack. The cranes 26, 27 and 28 will then move up, after which crane 25 can be returned to the rails and be rolled to the working location. This process of trading places will continue throughout the entire project."

Expectations are that the DDN fleet of cranes will be complete refurbished in just over two years' time.



A new service to Dublin and doubled frequencies to Bilbao and Gothenburg (from one to two sailings per week). X-Press Container Line is expanding its activities in Rotterdam at a rapid pace. Director Mark Allen's explanation of his company's philosophy is straightforward: "We focus purely on offering feeder services to deep-sea shipping lines."

The Competitive Edge of X-Press Container Line

The X Factor

“Every deep-sea shipping line is a customer of ours somewhere in the world. Sometimes in all our five hubs (Singapore, Colombo, Dubai, Gao Tauro, Rotterdam), sometimes just in one.” In describing the X-Press Container Line client base, Mark Allen offers a perfect explanation for the status and success of the feeder company. From modest beginnings in Singapore in the early 1970s, the company grew steadily and now operates an unrivalled feeder network across Asia under the name Sea Consortium. In January 2000, the business expanded to the Mediterranean as X-Press, and since May 2003, Northern Europe also falls within its ambit. But regardless of where it is active, the company sticks to the same philosophy at all times. Allen: “We focus purely on offering feeder services to deep-sea lines. We do not operate or lease any containers ourselves, and we don’t have any liner activities, whether deep-sea or short-sea. In this way we avoid any conflict of interests with our customers. What we offer are totally neutral common carrier services from transshipment port to destination port and back.” This exclusive concentration on deep-sea feeder services also distinguishes X-Press from its competitors, whose vessels in (almost) all cases carry a mix of door-to-door short-sea and feeder cargo.

North European Services

X-Press began its Northern Europe activities through the take-over of an existing feeder service of MISC between Rotterdam and the Iberian Peninsula (Spain and Portugal). Taking this as a jumping off point, the company then further expanded its services. Gothenburg in Sweden was soon added as a port of call and the service to Bilbao in Northern Spain and Leixoes in Portugal was split in order to improve transit times on this route. What’s more, in March 2004 the number of sailings to Portugal was increased from once to twice weekly. Since late November the sailings to Bilbao and Gothenburg have also doubled. “Generally speaking, two departures a week exactly meet the deep-sea carriers needs,” Allen explains. In addition X-Press has begun a new Dublin service, which for the time being will be run on a weekly basis.

With the increase in sailings and a new destination X-Press is clearly responding to the explosive growth in container volumes. “I think it’s fair to say that nobody in the container industry fully predicted the huge rise in volumes. We didn’t either - we’re not smarter than anyone else. But in an expanding market you obviously have to be able to offer the necessary capacity. And that’s what we do. Otherwise, at the end of the day

somebody else will walk off with the boxes.” Allen declines to venture a prediction on how long the current growth in the container sector will continue. “We live off the crumbs that fall from the giants’ tables. So we have to listen carefully to the giants, that is to say, the deep-sea carriers.”

Equal Berthing Importance

In Rotterdam X-Press is a customer of the ECT Delta Terminal. And with the exceptional growth in container volumes this year, also the feeder company has been adversely affected by the sudden boom in activities at the terminal over the last few months. “These last weeks we’ve once again had quite good performance,” says Allen. “But that’s only as it should be because Rotterdam is meant to be the number one port in Northern Europe. Good service is to be expected.” What he misses in Northern Europe generally is the culture in which feeders are given the same priority as deep-sea vessels - especially considering the logic of this. Given the increasing use of 8000+ TEU vessels, feeder- ing will only become more important, he believes. “If I interpret the studies correctly, the major deep-sea lines will try to limit themselves to a maximum of three or even two Northern European ports of call. There’s not a single deep-sea line however that can permit itself to return to Asia with empty slots because there was no place for feeder ships in the transshipment port.”

Scaling-up?

Having mentioned Asia, the X-Press director comments on the enormous differences in the capacity of feeder vessels in the Far East and Northern Europe. “In Asia the workhorses of our feeder fleet are vessels of 900 TEU; our biggest vessels are 1700 to 1800 TEU. Our smallest ships in Asia would now be the biggest in Europe. An average container ship in Europe carries 290 to 300 TEU, in Asia our ships load 500 to 1000 TEU.” Allen doubts whether the European feeder ships will grow to match those of Asia. At both ends of a service the ports would have to be able to handle large feeder ships very quickly. However, he does see possibilities for scaling-up should the deep-sea carriers decide to bypass the UK and service this large market via feeder- ing.

Allen: “We have regular discussions with deep-sea carriers to try to understand their strategies. Based on this we do our utmost to provide the right services to meet their requirements. Because as a very focussed deep-sea feeder operator that’s precisely the job we have to do.”

The global container industry has many links and just as many players at all levels. But no matter how comprehensive and complex the chain: before anything else, a ship is needed. Fast Forward therefore puts ECT's most tangible customers in the limelight: the captains who - with their ships fully laden with containers - maintain the connections between terminals all over the world.

At the Helm



Name
Country of birth
Captain of
Career

Capt. Piet Koop
The Netherlands
The P&O Nedlloyd Kowloon
"At P&O Nedlloyd, captains and crew members are trained for all vessels and all sailing areas. I started my career as navigating officer at the NV Koninklijke Hollandsche Lloyd and later joined the ranks of Nedlloyd through a merger. I have sailed on a lot of chemical tankers, but since about ten years P&O Nedlloyd only has container vessels. About three weeks ago, I replaced a colleague who was ill on the P&O Nedlloyd Kowloon in Hong Kong. The Brazil loop is my favourite one. In this loop we use smaller vessels with which we call at many different ports."
"Compared to other ports, Rotterdam is very well organized. Due to its spacious lay-out, it is always easy to enter and leave the port. No locks, always enough depth and, especially here at the Delta Terminal, always enough room to manoeuvre. It is a professional and safe port in all respects."
East: Le Havre, Rotterdam, Antwerp, Bremerhaven, Suez Canal, Singapore, Koashung. *West:* Pusan, Shanghai, Hong Kong, Singapore, Port Kalang, Suez Canal, Damietta. "A round trip takes us about eight weeks."
Crew 23 men; length 299.90 metres; width 42.80 metres (17 rows); speed 24.5 knots at full load; capacity 6690 TEU; DWT 88,669 metric tons.

Nautical qualities Rotterdam

Current sailing schedule

Specifications ship

Visit us on the Web!

Want to know more about ECT, visiting ships or certain containers? Or are you perhaps looking for that one container photograph, a specific brochure or a former issue of Fast Forward? These are just a few examples of the many options available at www.ect.nl. In addition, the secured extranet section of the website offers customers various e-services for the efficient online exchange of data with ECT.



New is that from early next year, the ECT website will show live images of the Delta Terminal via a webcam. A feature that is currently already available is the option to download photographs of the terminals, the equipment, visiting ships, trains, trucks etcetera. Another interactive feature is the overview of hinterland connections. And the website offers much more, including, of course, the latest news about ECT.

Who wants to know whether a specific ship or container has arrived at one of the ECT terminals can make use of the search options in respectively 'Object status' and 'Container status'. However, a container number is

needed for the latter. Regarding 'Object status', entering the name of the ship you are looking for is recommended, but searching in a list per terminal and/or operator in most cases also yields the desired results.

E-Services

One section of the ECT website is only accessible to authorised users. This secured so-called extranet offers numerous e-services aimed at the efficient exchange of information between ECT and its customers. Examples are the extensive object status and container status, 24-hour reports, load & discharge lists, container number release orders, transport orders, terminal performance reports and much more. The number of services is continuously expanded. The latest addition is the 'Acceptance orders containers to object'.

Each month, www.ect.nl is consulted about 100,000 times. In total, these visitors view more than two million pages. If you have not yet been to our site, then come visit us on the web!

Terminal Overview

A brand-new service for all visitors to the website is Terminal Overview. Based on a satellite image, it is possible to view the (general) information of all the ships that are present at the ECT Home and the ECT Delta Terminal at that specific moment. This feature also allows visitors to go back or ahead in time.

The Container Journey III

Students of the Willem de Kooning Academy - Rotterdam's academy for the visual arts - will this year grace the back page of Fast Forward with their interpretations of the world-wide travels of containers and their cargoes. In this edition, the work of:

Marcos Leonardo Castro Beltran

"My illustration depicts the journey of containers travelling from China to Italy via Rotterdam. The cranes are a reference to the port of Rotterdam, the fishes are a Chinese symbol of prosperity. The various flags denote the union that exists between the countries, which are all united against a wallpaper of cranes. By making the container gold, it acquires a divine status, a shining beacon in this new, free-world market."

For more information about the Willem de Kooning Academy Rotterdam, surf to <http://wdka.hro.nl>

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