

TERMINAIS DE CONTENTORES EM PORTUGAL: QUE FUTURO COMO PÓLOS DE DESENVOLVIMENTO DO PAÍS?



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14/05/2013

Todos os elementos estatísticos tiveram como fonte o IPTM, as Administrações Portuárias e os Puertos Del Estado, tendo sido tratados pela Logimarís / InsStat

Alguns dados importantes

☐ A evolução da dimensão dos Navios

- * Qual o limite ?
- * Certos portos já começam a recusar fazer mais investimentos para acolher navios de maiores dimensões
- * Reflexos nos tempos de trânsito e nos portos

☐ Aumento da dimensão dos grandes armadores por compra ou fusão de/com outros de menor dimensão

Alguns dados importantes

- ❑ Investidores estão mais dispostos a investir nos portos do que na actividade do transporte marítimo
- ❑ O alargamento do Canal do Panamá
 - * Que vantagens pode trazer?
 - * Qual a realidade dos factos?
 - * Reflexos nos tempos de trânsito e nos serviços?
- ❑ Os terminais e o seu negócio

A evolução da dimensão dos Navios

Shape of things to come?

Maersk Line certainly thinks so, believing that its new 18,000TEU-*Triple E-class* of containerships will be the most energy-efficient, economical and environmentally friendly vessels in the world. But, as **John Fossey** reports, there are risks and a multitude of concerns.

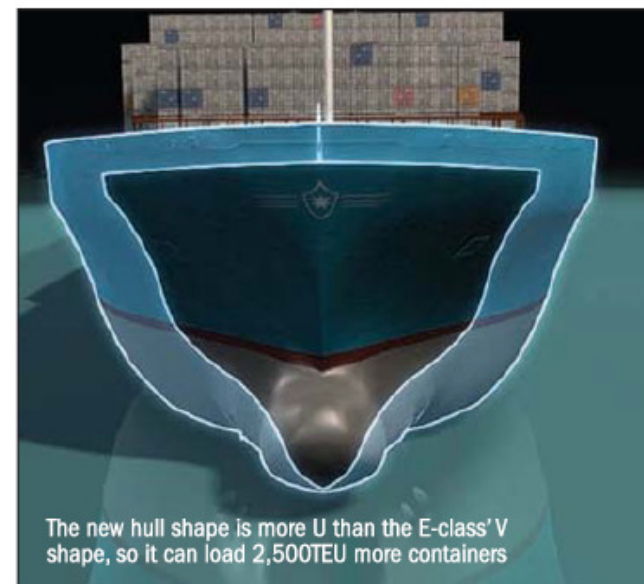
Maersk Line's latest order for a series of 10 x 18,000TEU ships worth USD1.9 billion, with a possible 20 options being exercised takes the deal's potential value to within a whisker of USD6 billion, has certainly taken the industry by storm.

In some respects the Danish carrier's action has also set out what it views to be the ground rules for the liner industry of the future.

knots for the *E-class* units and reflects Maersk's management conviction that 'slow steaming is here to stay'.

Finally, they feature what Kolding referred to as a 'cradle-to-cradle passport.'

'We will ensure that as near to 100% of the ships will be recyclable and will be used to build our next generation of vessels,' explained Kolding. 'We will log and number all the materials and parts used in



The new hull shape is more U than the E-class' V shape, so it can load 2,500TEU more containers

A evolução da dimensão dos Navios

World Cellular Fleet – March 2013 (excluding newbuild postponements and cancellations under negotiation)

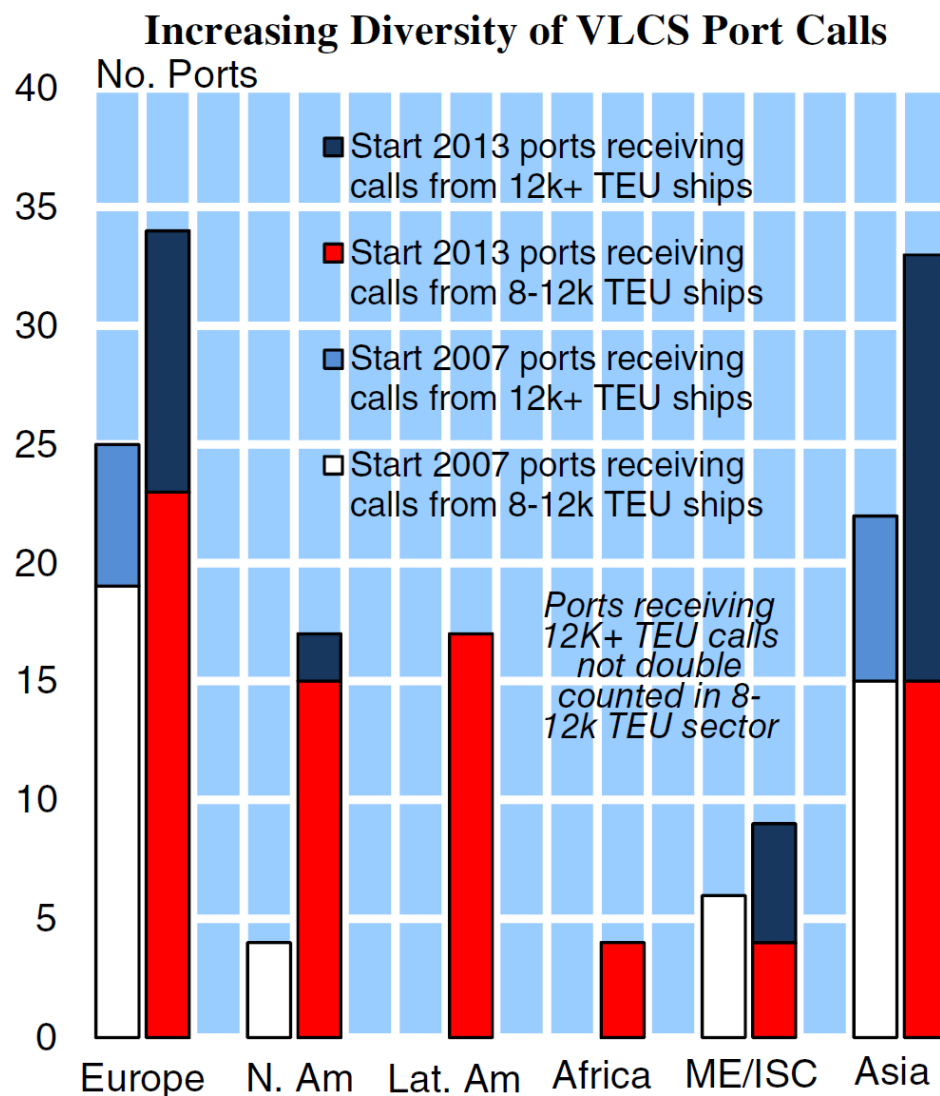
TEU Size range	In service today		On Order 2013		On Order 2014		On Order 2015		Total teu on order	Total teu on order
	No	Teu	No	Teu	No	Teu	No	Teu		
0-1,499	1,796	1,470,008	25	21,209	12	12,880	2	2,200	39	37,093
1,500-2,999	1,214	2,648,592	47	99,932	16	33,740	4	8,800	68	144,172
3,000-4,999	953	3,910,309	67	284,434	11	50,736	8	29,500	92	387,270
5,000-7,999	606	3,686,379	26	160,868	18	95,500	2	13,800	46	270,168
8,000-9,999	284	2,432,948	42	368,178	39	343,156	9	81,400	91	801,934
10,000-12,499	52	568,028	10	104,800	12	120,000	3	30,000	25	254,800
12,500-15,999	119	1,601,293	23	305,916	31	412,686	10	139,350	68	908,352
Over 16,000	1	16,020	7	122,040	10	176,000	11	190,000	28	488,040
Total	5,025	16,333,577	247	1,467,377	149	1,244,698	49	495,050	457	3,291,829

172 **2.185.341**

121 **1.651.192**

Fonte: CI April 2013

A evolução da dimensão dos Terminais/Portos



Source: Clarkson Research Services

Os 20 principais armadores

Table 1: Top 20 carriers' fleet capacity on April 9, 2013, compared with January 9, 2013

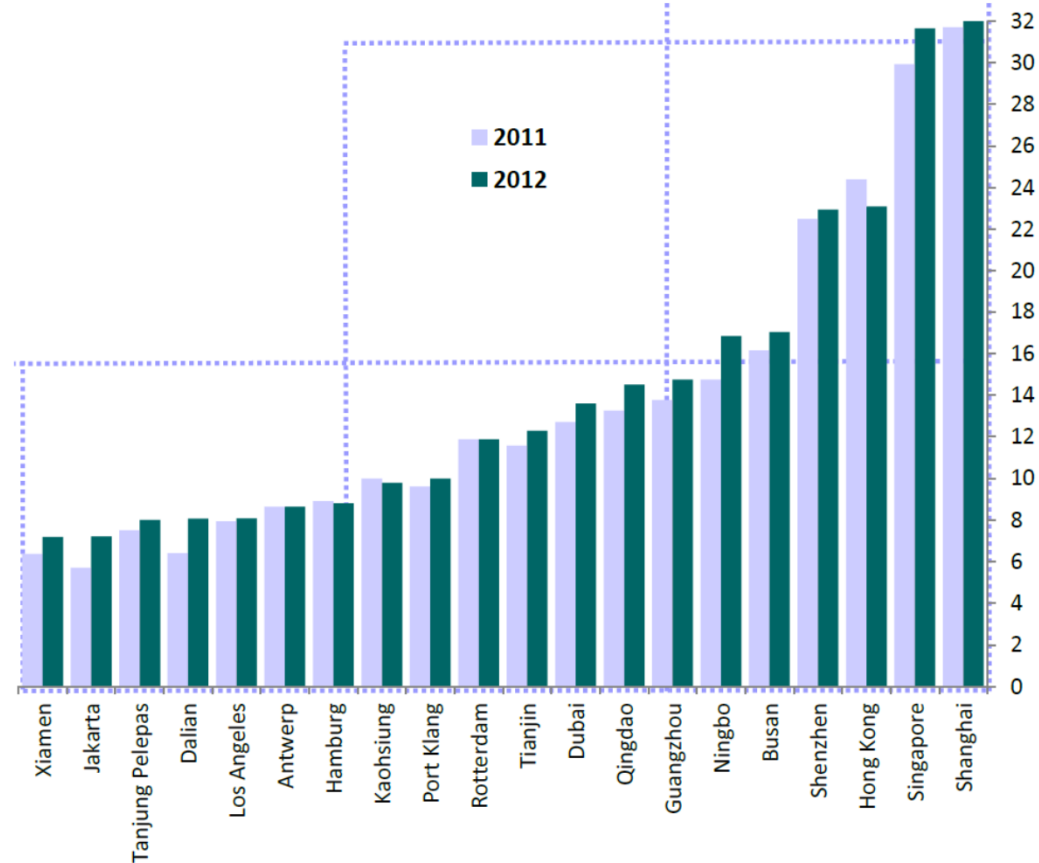
Company	2,000-2,999 teu	3,000-3,999 teu	4,000-4,999 teu	5,000-5,999 teu	Above 6,000 teu	Total teu	% of fleet	% change
APMM Group ^[1]	325,779	95,781	400,478	117,497	1,288,999	2,471,374	13.3	-2.0
MSC	166,228	147,366	299,809	223,656	1,228,901	2,192,315	11.8	3.4
CMA CGM ^[2]	246,405	98,492	102,921	127,846	665,964	1,451,212	7.8	-0.2
Evergreen Line	90,100	41,657	112,320	146,428	285,714	757,602	4.1	3.1
Coscon	13,715	81,894	68,912	148,610	374,909	741,591	4.0	1.3
Hapag-Lloyd	105,404	52,867	196,244	84,778	247,869	699,927	3.8	6.9
Hanjin	28,753	39,995	135,035	99,594	301,143	621,744	3.4	9.5
APL	17,813	41,830	173,009	93,752	252,638	607,690	3.3	0.8
CSCL	44,582	0	163,083	73,534	274,184	585,328	3.2	2.4
Mitsui OSK Lines	33,383	10,534	131,564	97,885	228,748	534,348	2.9	1.3
OOCL	24,031	3,398	118,229	94,594	220,387	499,886	2.7	4.6
Hamburg Sud ^[3]	43,449	69,063	109,556	90,834	87,722	428,853	2.3	-4.3
NYK Line	48,620	17,672	97,391	0	228,054	420,131	2.3	2.4
Yang Ming	5,238	37,981	86,609	66,086	139,953	379,884	2.0	-3.3
HMM	24,378	3,398	73,452	48,108	210,174	370,204	2.0	-2.5
K Line	15,308	3,720	107,059	84,434	121,502	351,408	1.9	-1.7
Zim Line	6,864	34,290	143,960	20,717	61,335	291,173	1.6	0.1
CSAV ^[4]	4,982	31,228	67,290	32,703	135,511	282,052	1.5	-7.4
PIL ^[5]	70,546	35,196	42,932	11,014	26,412	275,610	1.5	2.4
UASC	0	41,520	42,253	5,896	173,960	269,300	1.5	-0.4
Total teu	1,315,578	887,882	2,672,106	1,667,966	6,554,079	14,231,632	76.7	1.0
Others' total teu	542,790	166,187	226,212	55,049	61,126	4,326,195	23.3	-0.4
World total teu	1,858,368	1,054,069	2,898,318	1,723,015	6,615,205	18,557,827	100	0.7

32,9 %

Evolução da actividade

January 2013

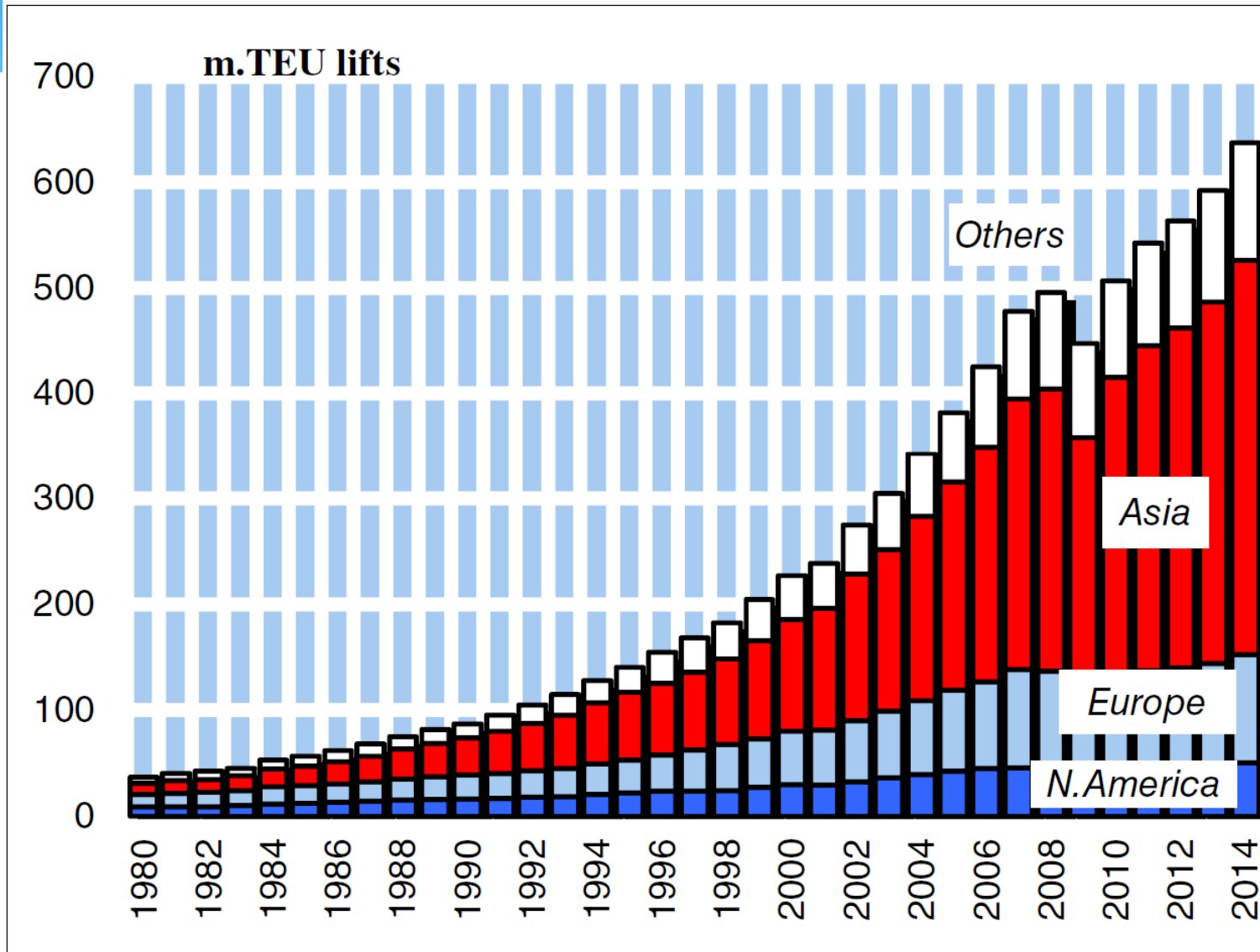
**2011-2012
Container Throughput
at Top 20 Ports
(Millions of TEU)**



Fonte: Container Trade Watch Jan 2013

Evolução da actividade

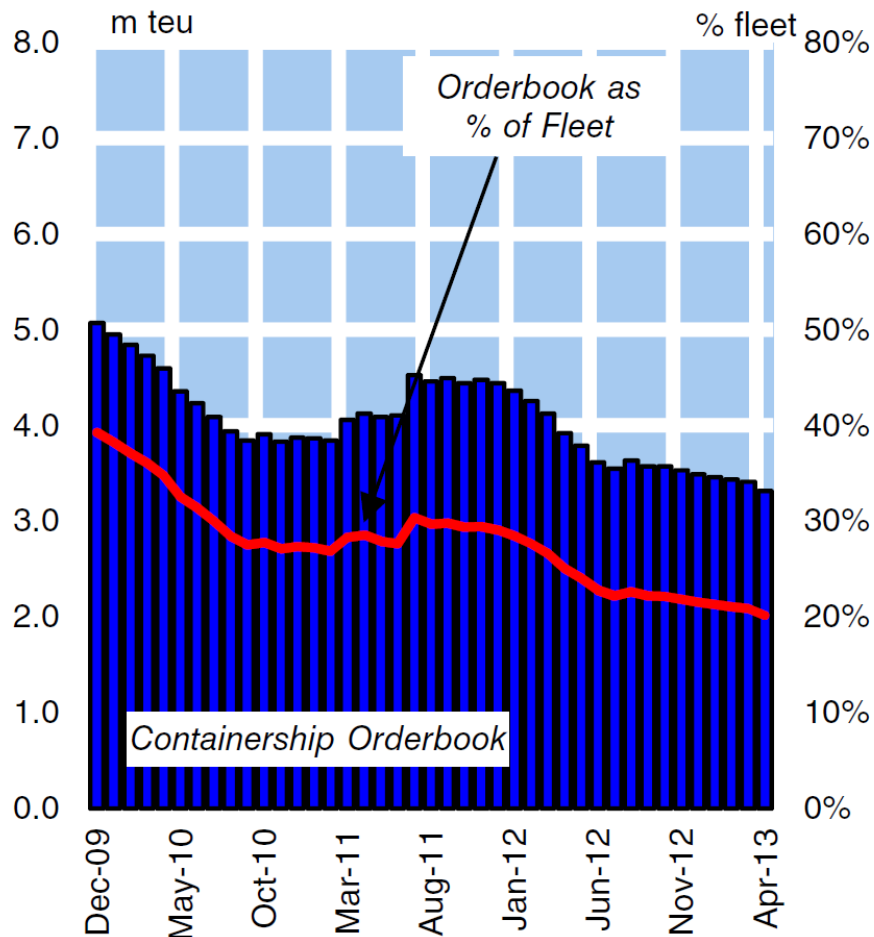
Container Demand



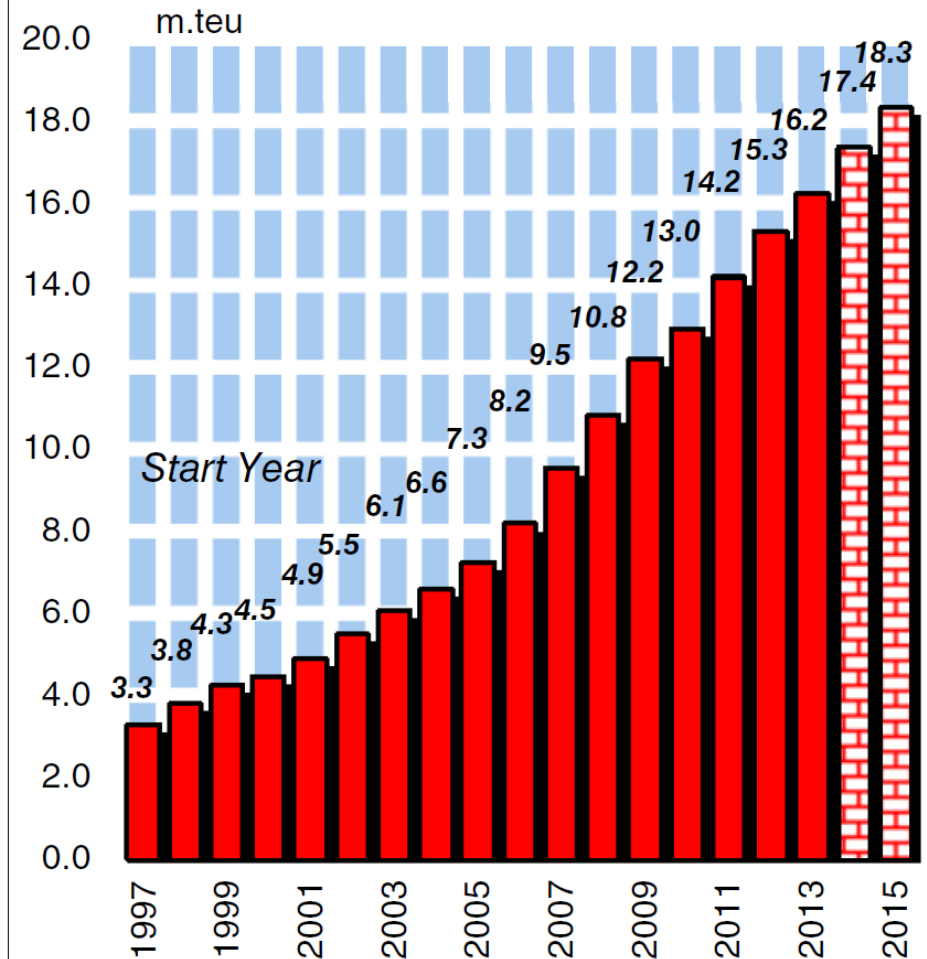
Evolução da actividade

Fonte: Clarkson April 2013

Containership Orderbook

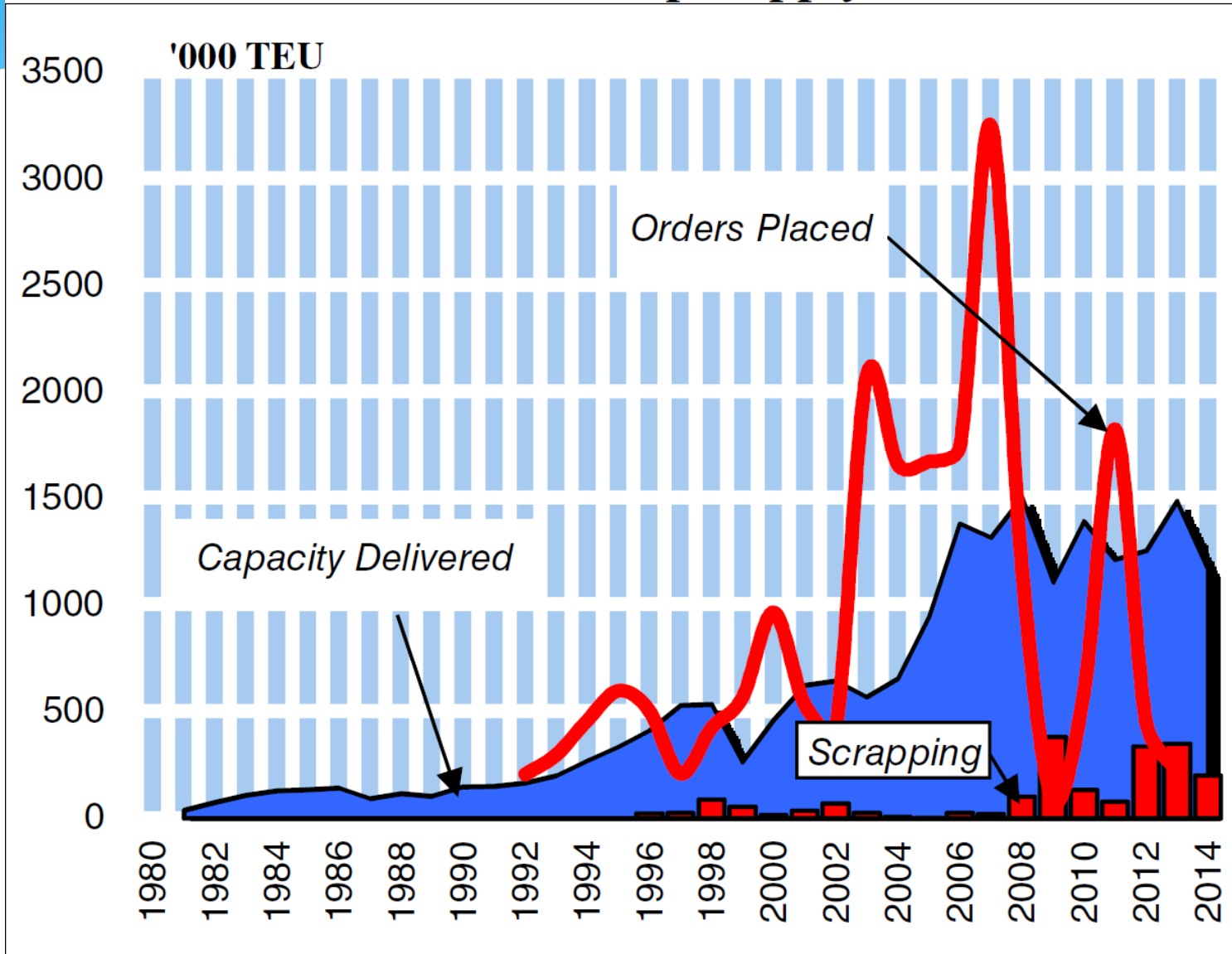


The Containership Fleet



Evolução da actividade

Containership Supply



Fonte: Clarkson April 2013

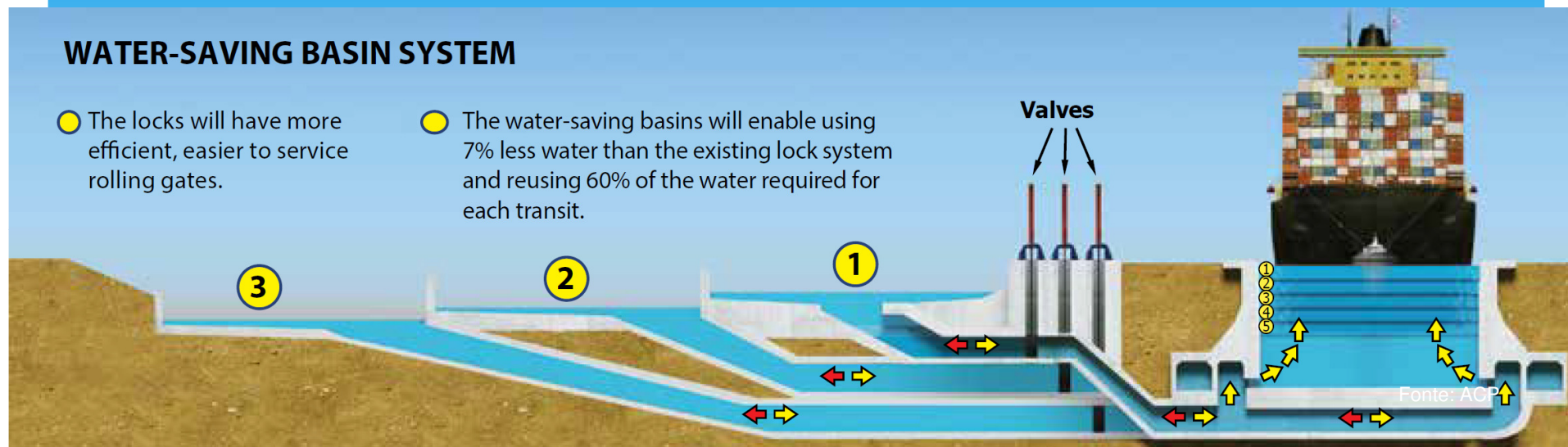
O alargamento do canal do Panamá

Fonte: ACP (www.pancanal.com)

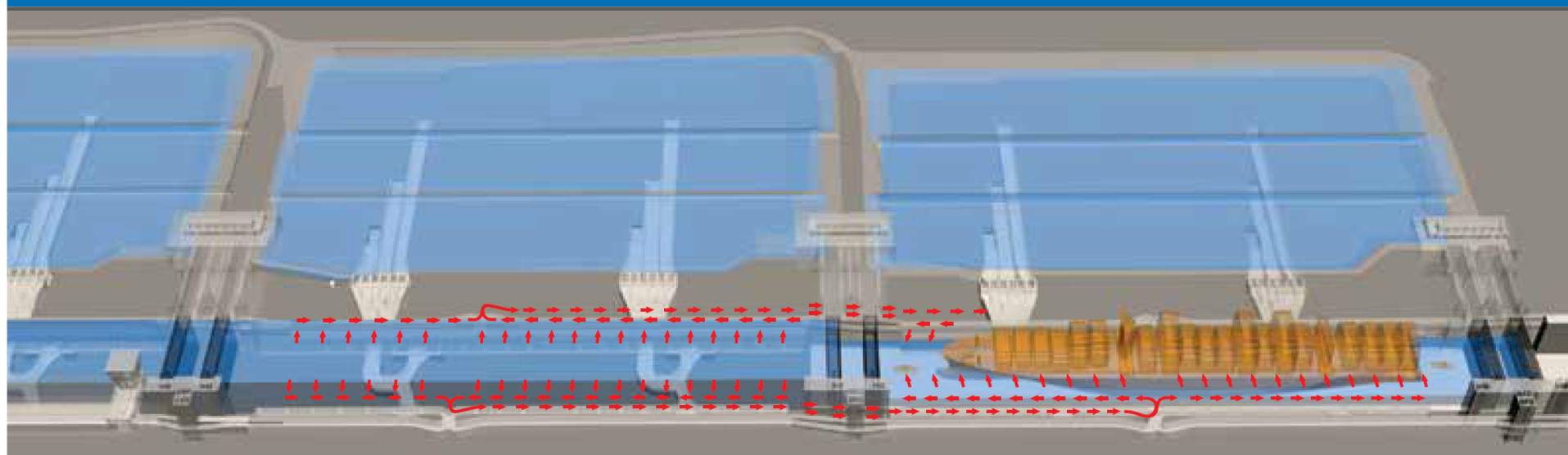
WATER-SAVING BASIN SYSTEM

● The locks will have more efficient, easier to service rolling gates.

● The water-saving basins will enable using 7% less water than the existing lock system and reusing 60% of the water required for each transit.



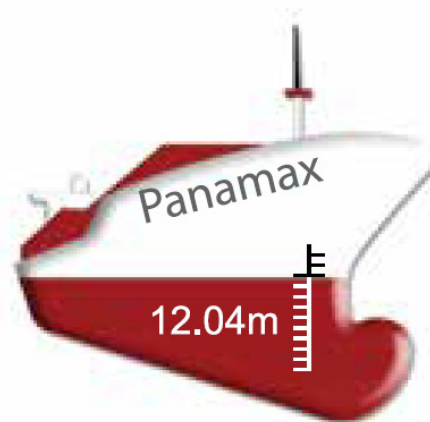
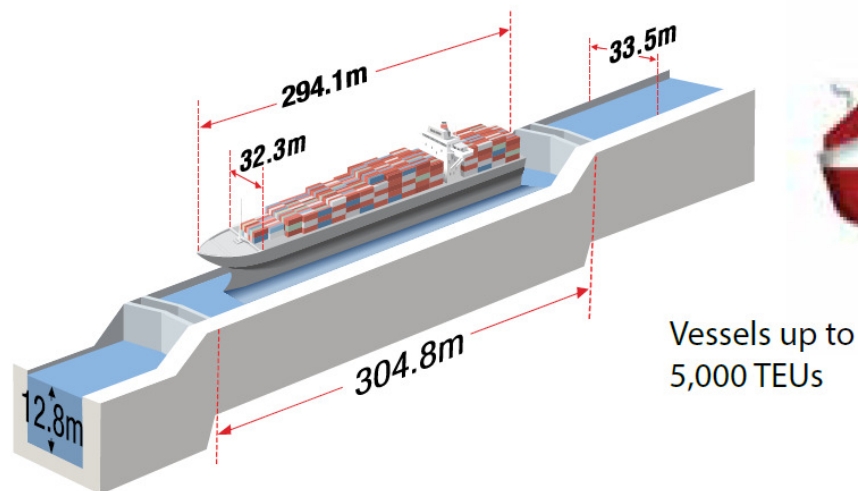
CULVERT AND WATER-SAVING BASIN SYSTEM



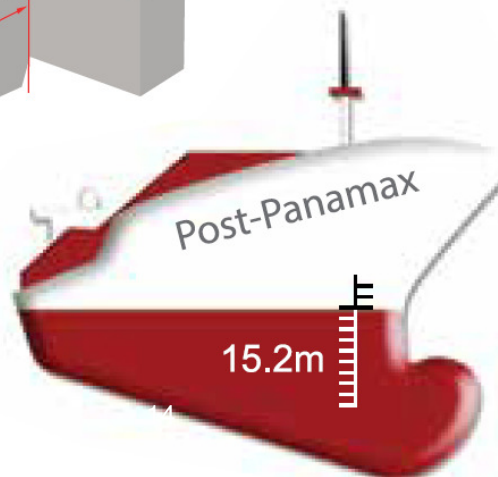
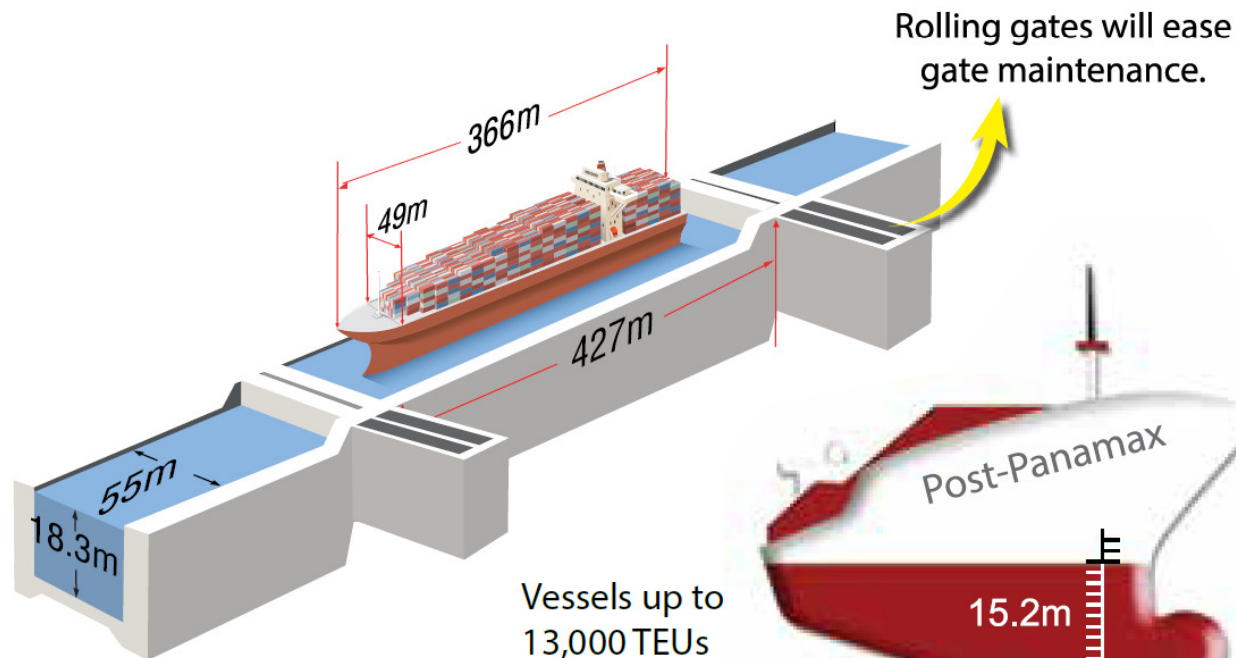
O alargamento do canal do Panamá



EXISTING LOCKS



NEW LOCKS



O alargamento do canal do Panamá

O Plano foi concebido em 2006 quando o maior navio que estava a ser construído era da Cosco, tinha uma capacidade para 10.000 TEU's, com 349 m de comprimento, 46 m de boca e 14,5 m de calado

O alargamento do canal do Panamá

- ❑ O calado será restrito a valores inferiores, dependendo da altura do ano e das condições do lago Gatún, sendo, para além disso, calados de água doce. Em água salgada, os calados máximos terão restrições entre 13,5m e 14,8m.
- ❑ A boca dos navios será também restringida a 46,3 m para navegação unidireccional no canal, ou 75 m na soma das duas bocas de dois navios que se cruzem, no caso de navegação bidireccional.

Navios MSC que escalam Sines no Serviço de Shanghai

Ship	Built	GT	DWT	LOA m	Beam m	Draught m	TEU's	TEU's 14T
MSC Renee	2012	135.000	140.570	366,0	48,0	15,5	13.102	8.921
MSC Filomena	2011	158.000	142.500	366,0	48,0	15,5	12.562	9.080
MSC Fabiola	2011	158.000	142.500	366,0	48,0	15,5	12.562	9.080
MSC Ariane	2012	143.521	154.503	366,0	48,0	16,0	13.050	9.400
MSC Irena	2010	151.559	156.301	366,0	51,0	15,0	13.798	10.500

Canal do Panamá Max. (m) 46,3 13,5 a 14,8



Navios MSC que escalam Sines no Serviço de Shanghai

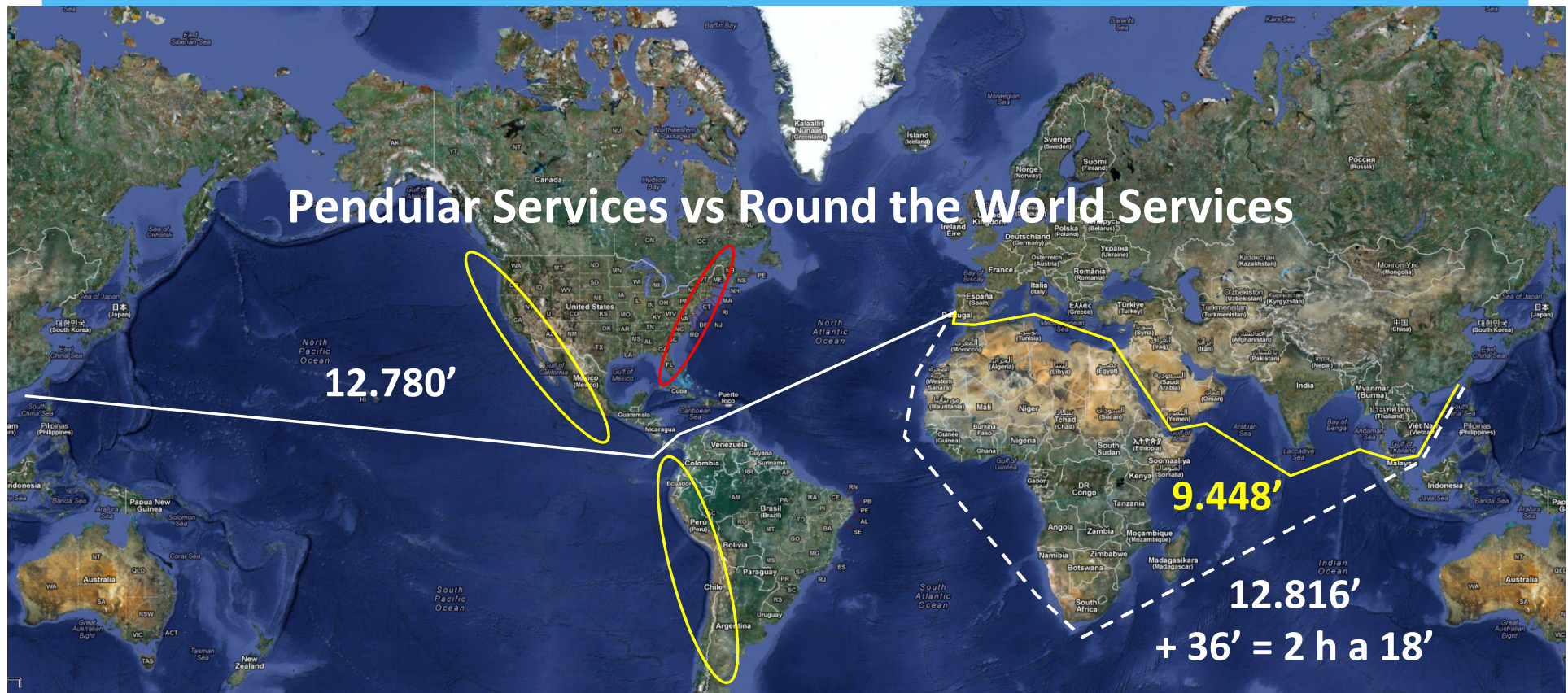
Canal do Panamá Max. (m) 46,3 13,5 a 14,8



Ship	Built	GT	DWT	LOA m	Beam m	Draught m	TEU's	TEU's 14T
Emma Maersk	2006	170.974	156.907	397,7	56,4	15,5	15.000	11.000

O alargamento do canal do Panamá

Distâncias Shanghai – Costa Portuguesa
(milhas marítimas)



Cálculo de distâncias: <http://sea-distances.com/>

+ 3.332' : 18' : 24h = + 7,7 dias de viagem

Os terminais e o seu negócio

☐ Hinterland Nacional

Mercado Nacional

☐ Hinterland Internacional

☐ Transhipment

☐ Feeder

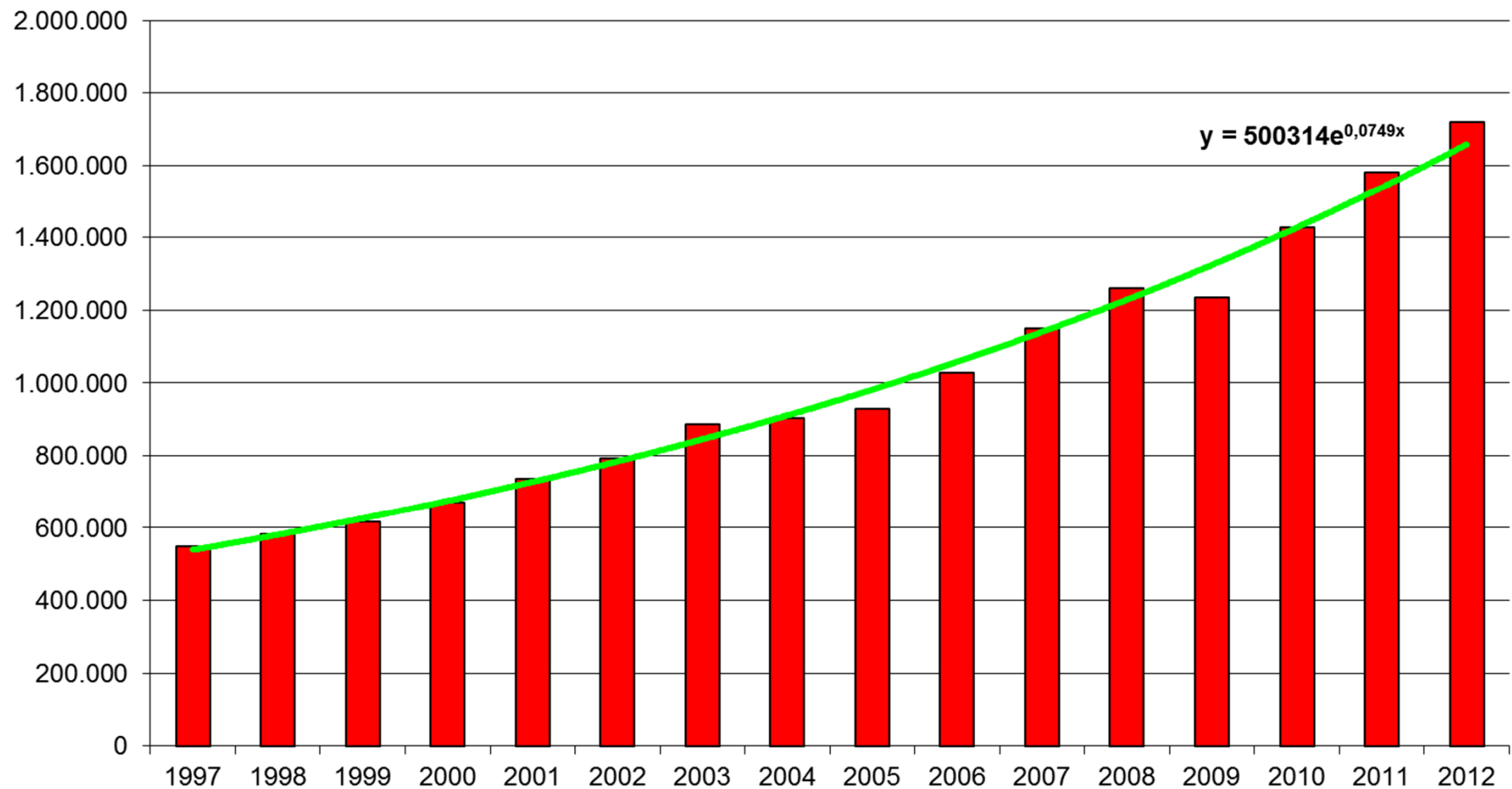
☐ Nacional

☐ Internacional

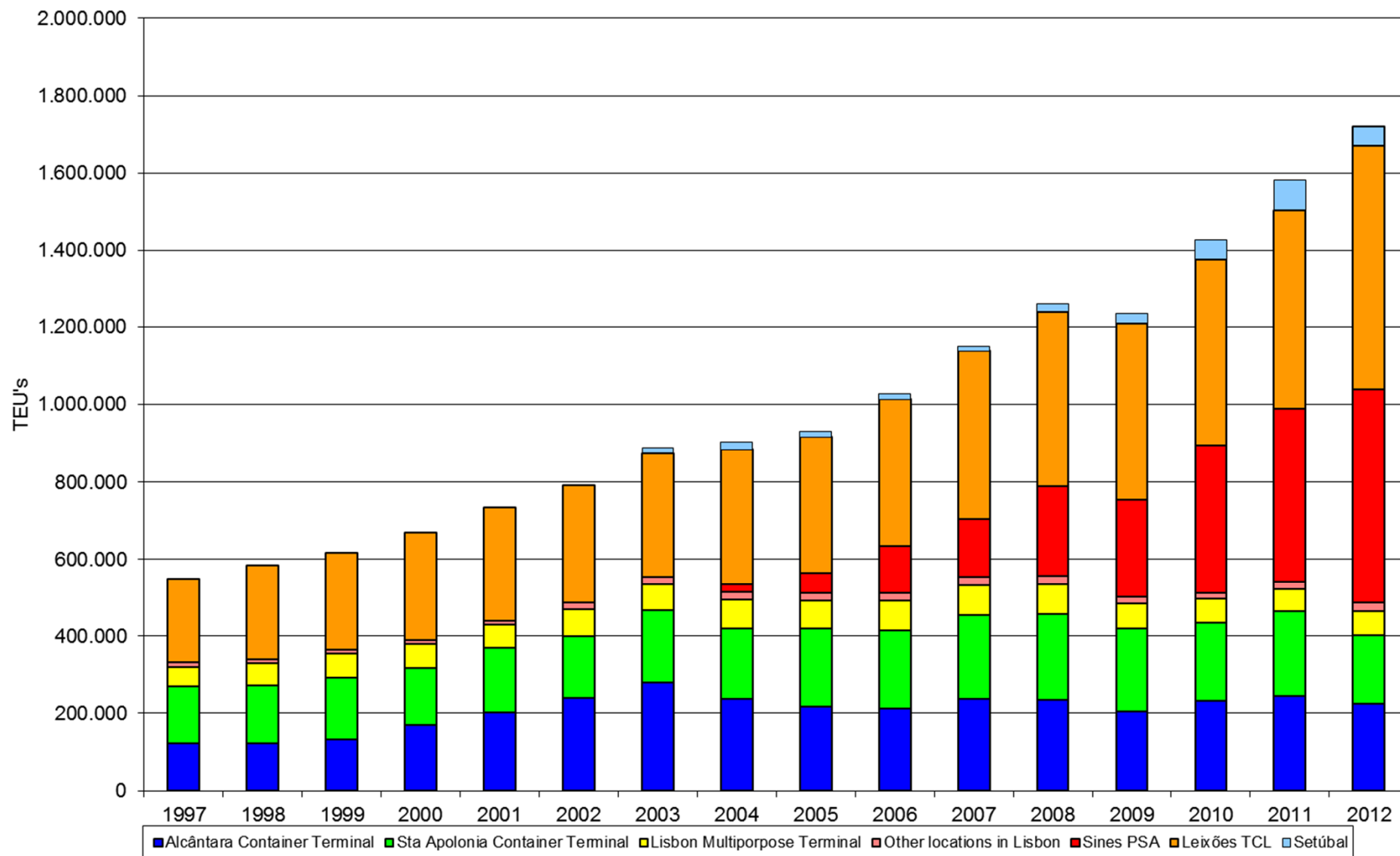
☐ Cross trade

Exportação de Serviços

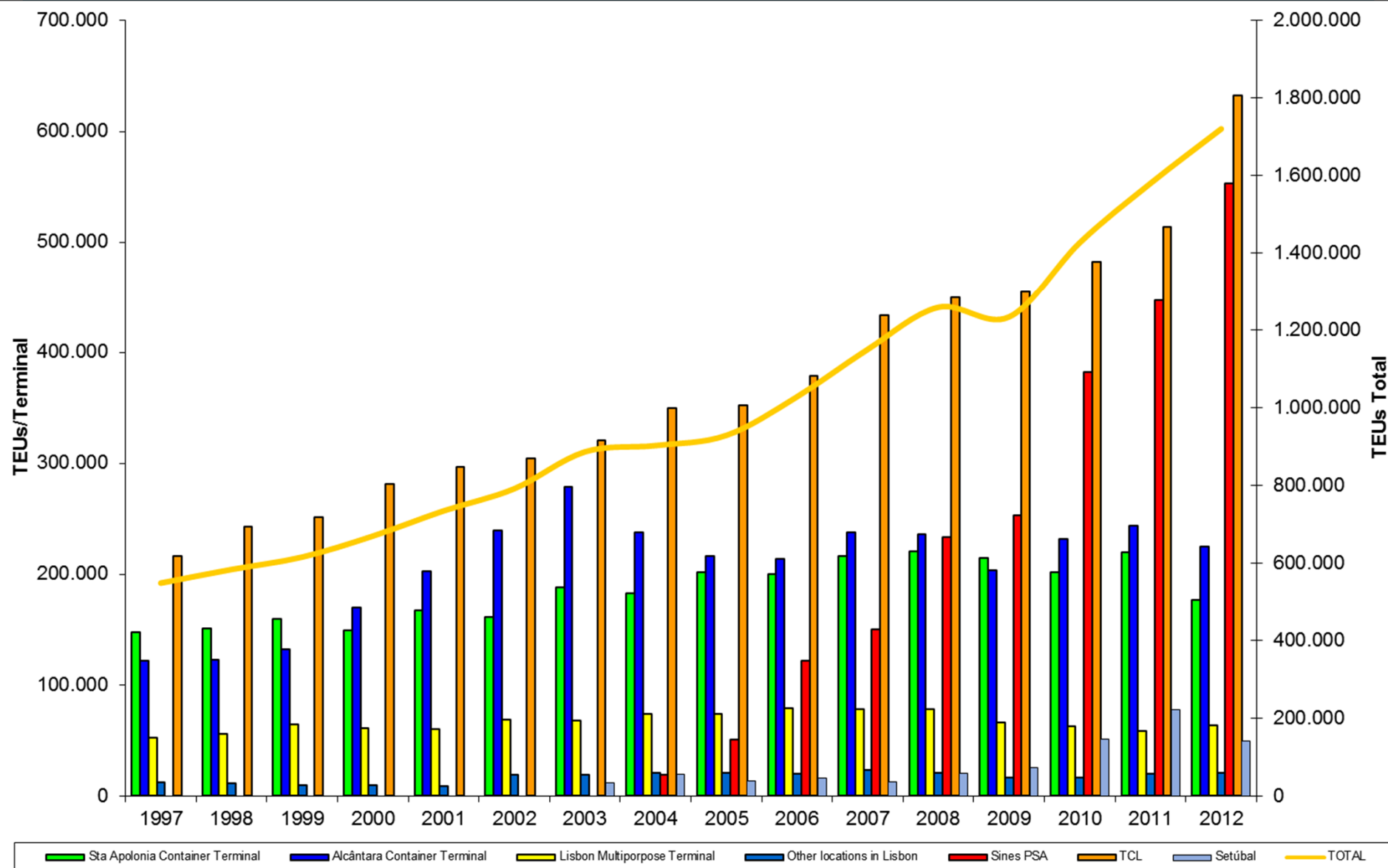
Global Container Movement in Portugal (TEU's)



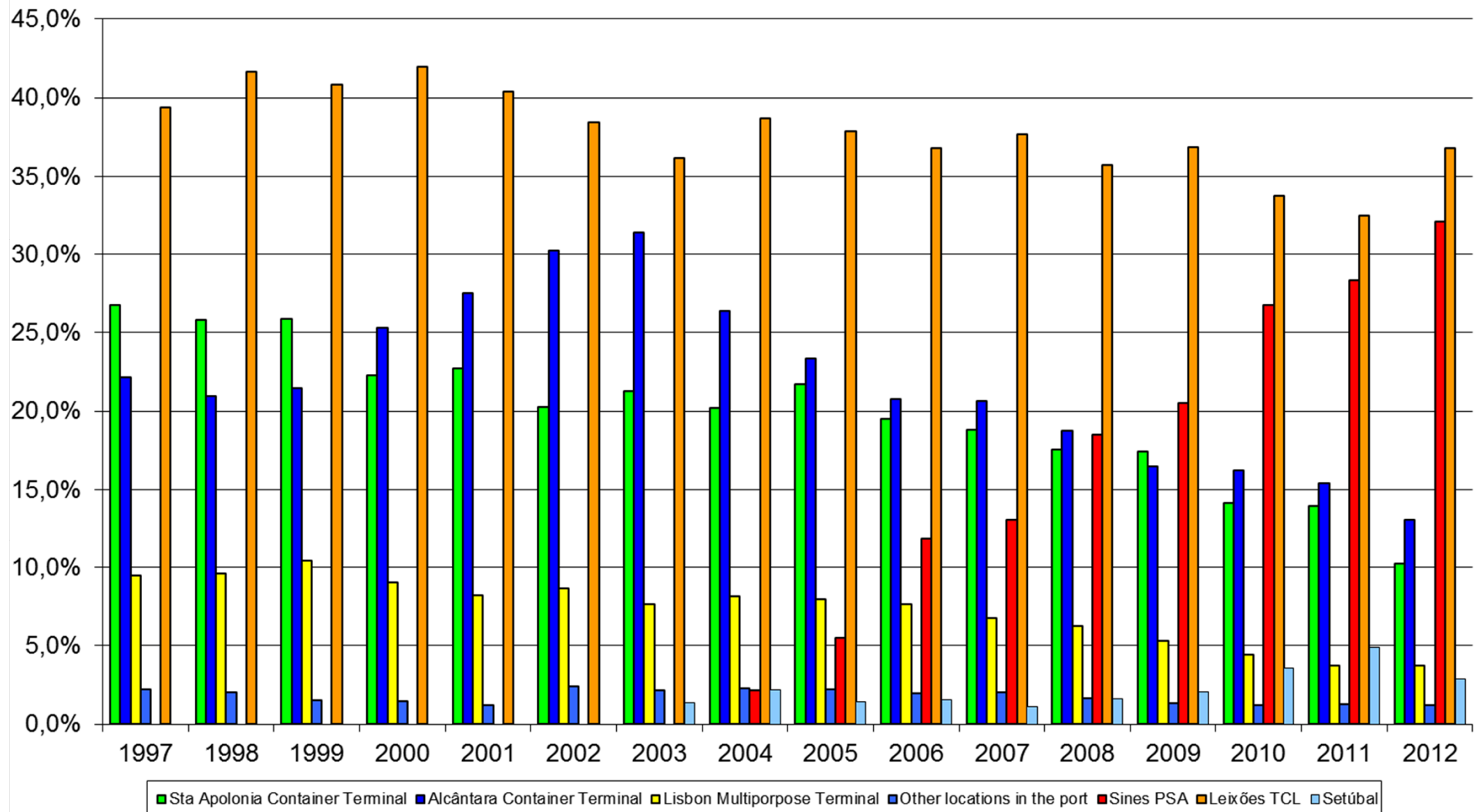
Portuguese Container Movement by Terminal



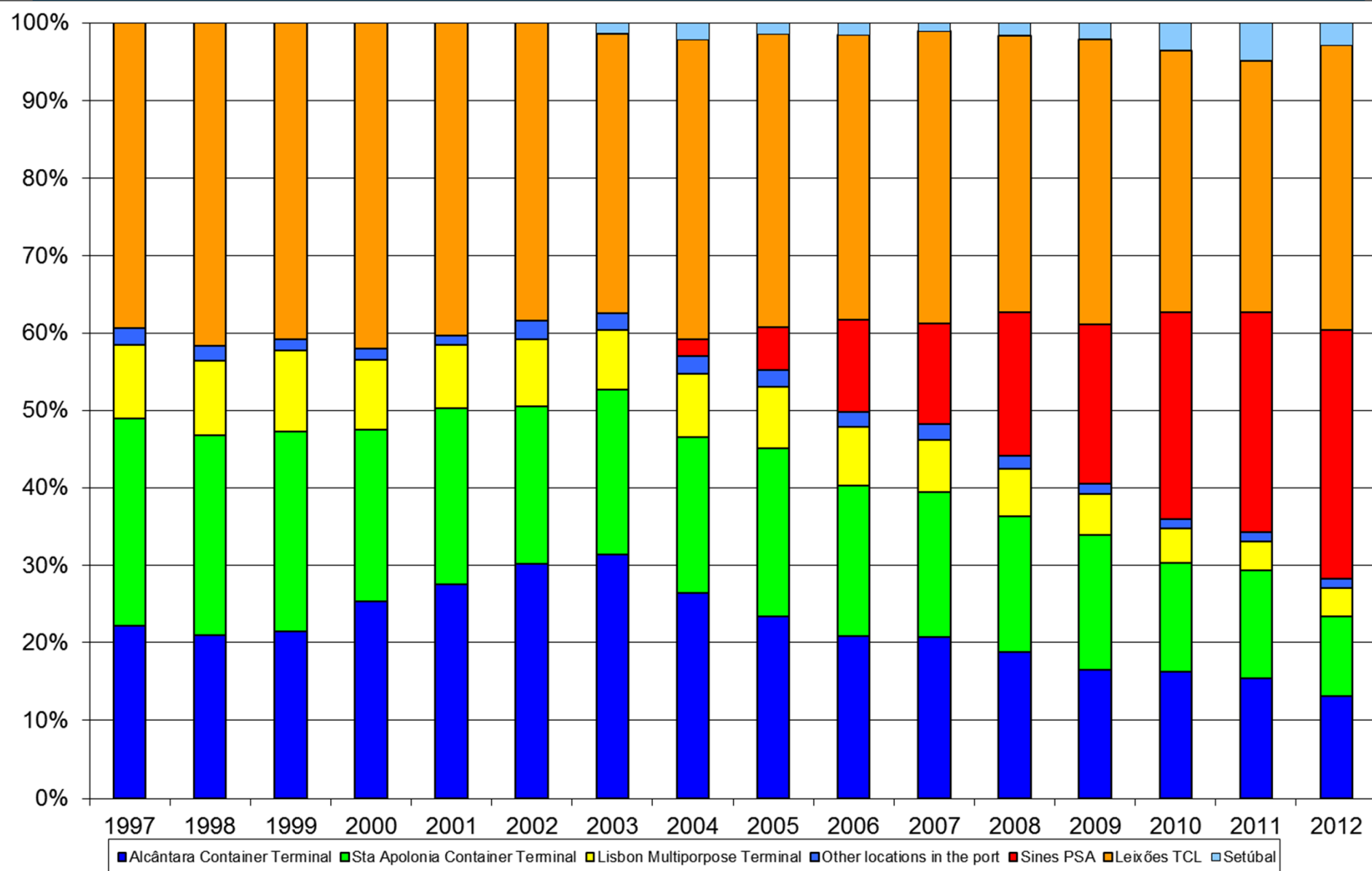
Portuguese Container Movement by Terminal



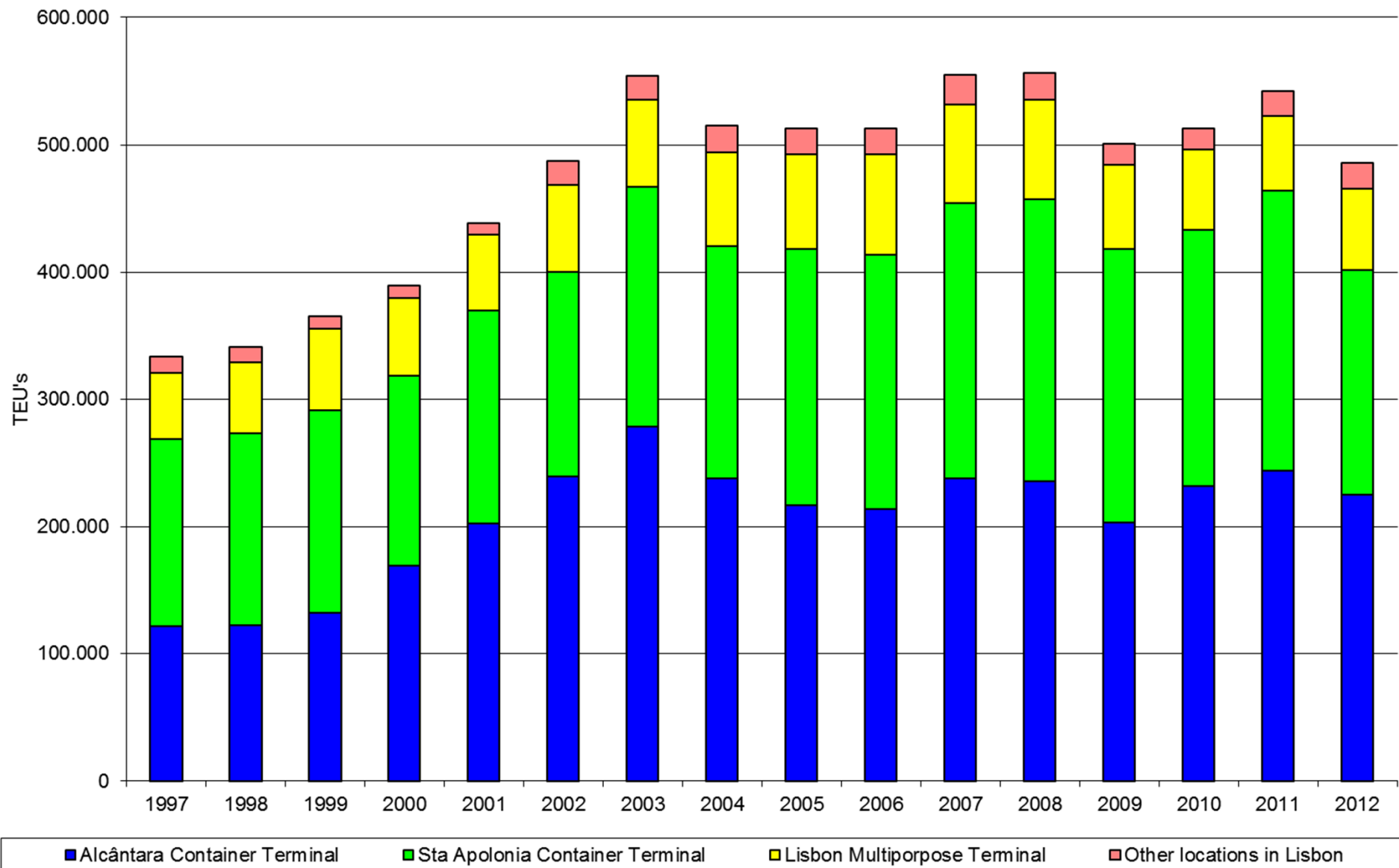
Portuguese Container Terminal Market Share



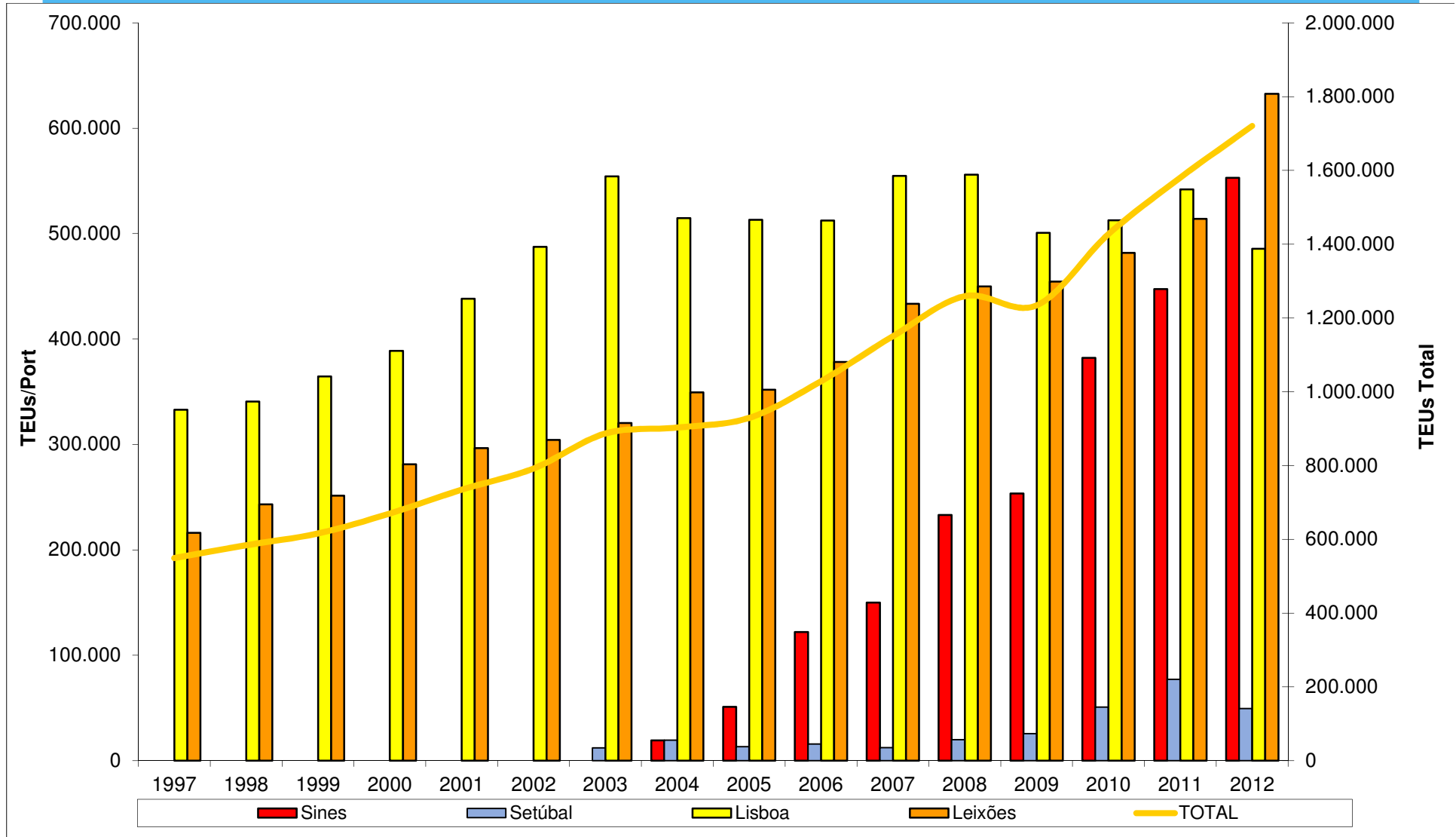
Portuguese Container Terminal Market Share



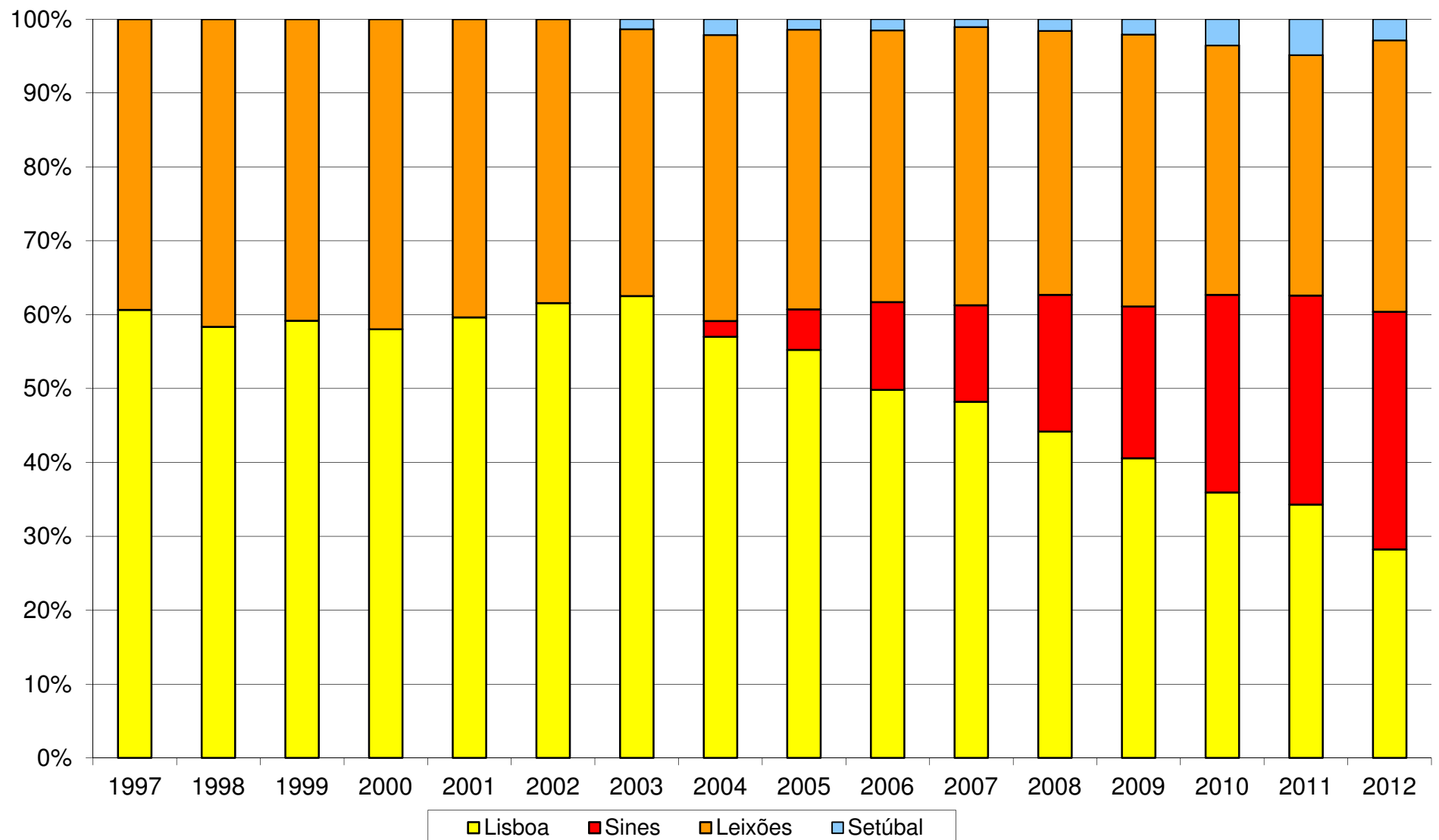
Lisbon Container Movement by Terminal



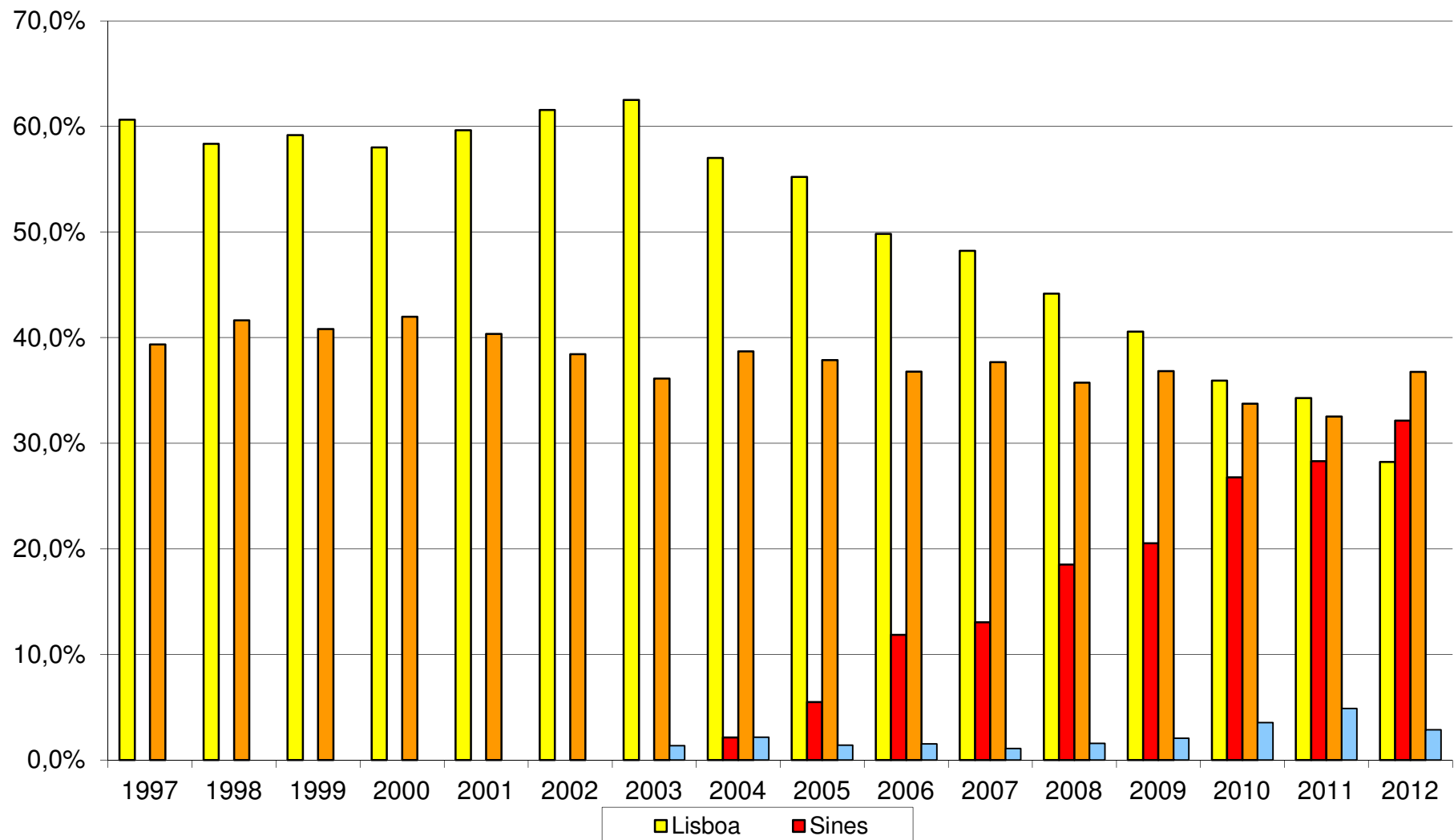
Portuguese Ports Container Movement



Portuguese Ports Container Market Share



Portuguese Ports Container Market Share

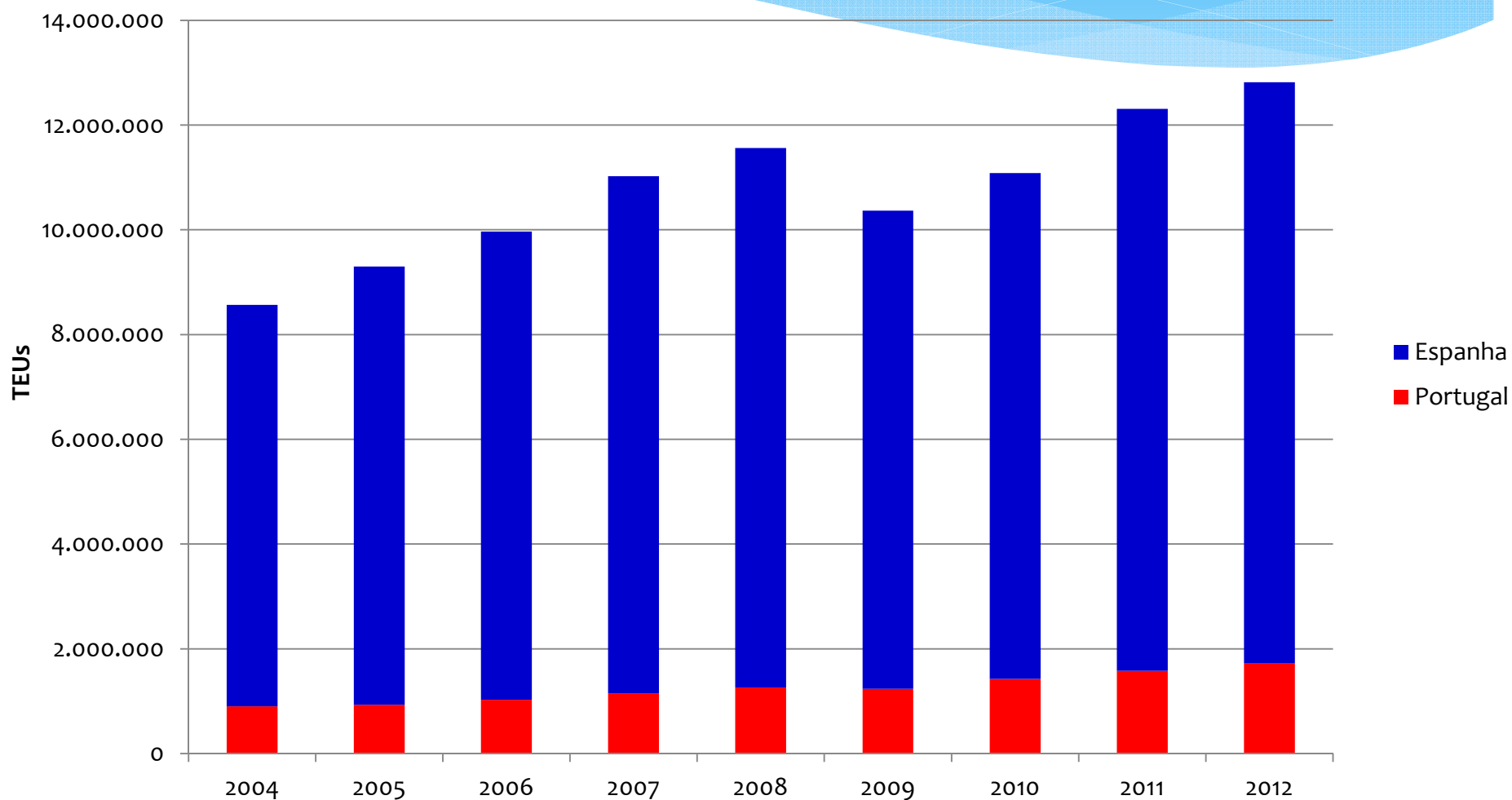


Global Container Movement in Iberia (TEU's)

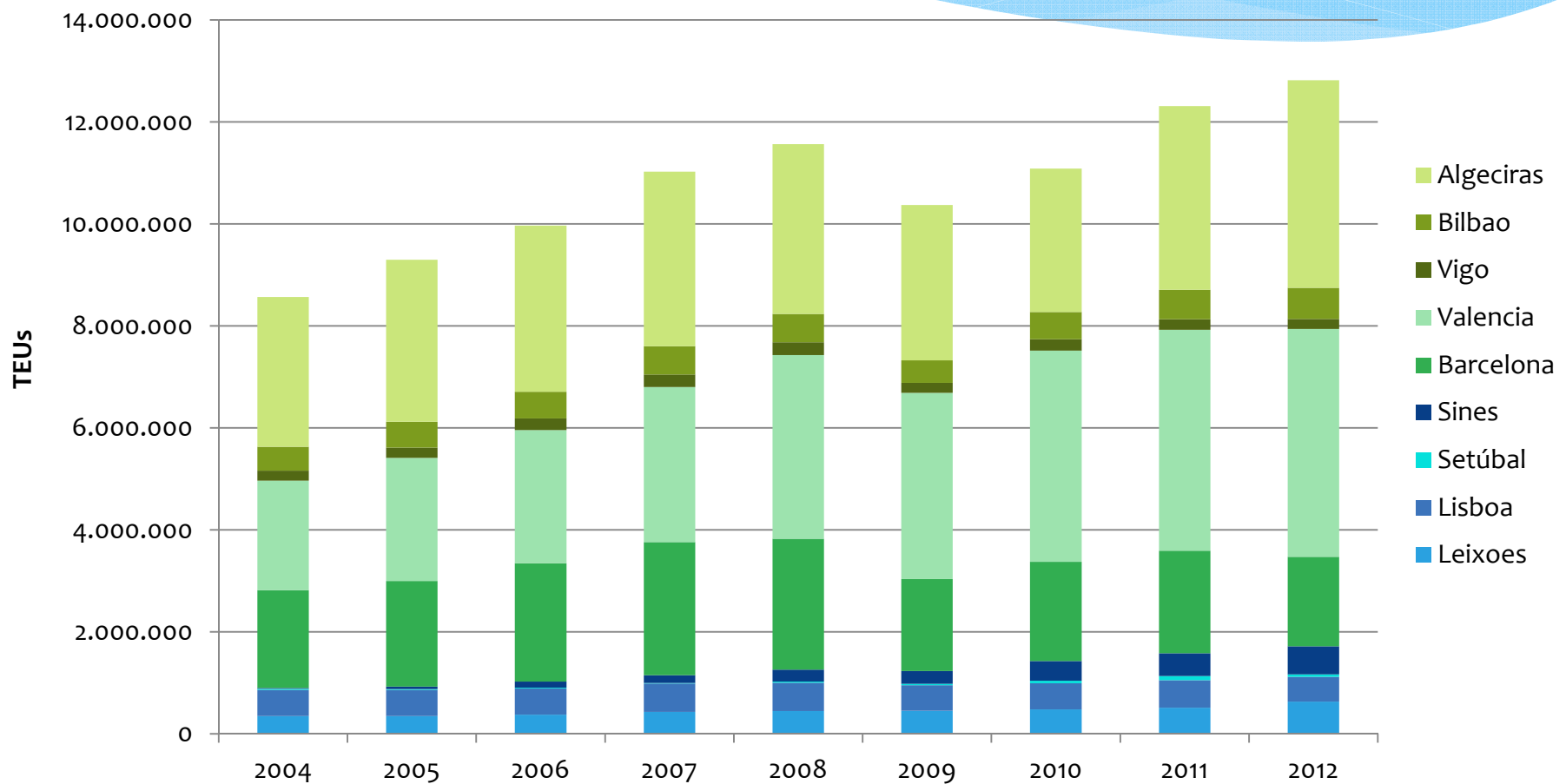
Ports	2004	2005	2006	2007	2008	2009	2010	2011	2012
Leixoes	349.495	352.002	378.387	433.486	450.026	454.503	481.818	514.088	632.673
Lisboa	514.769	513.061	512.501	554.774	556.062	500.857	512.789	541.906	485.761
Setúbal	19.515	13.145	15.736	12.425	19.952	25.506	50.744	77.127	49.350
Sines	19.211	50.994	121.957	150.038	233.118	253.495	382.089	447.495	553.063
Barcelona	1.916.493	2.071.481	2.318.239	2.610.100	2.569.549	1.800.213	1.945.733	2.013.967	1.749.974
Valencia	2.145.236	2.409.821	2.612.049	3.042.665	3.602.112	3.653.890	4.142.100	4.327.371	4.469.754
Vigo	197.269	205.497	226.927	244.065	247.873	193.921	222.463	212.120	198.517
Bilbao	468.959	503.805	523.113	554.558	557.345	443.464	538.133	572.784	610.131
Algeciras	2.937.381	3.179.300	3.256.776	3.420.533	3.327.616	3.042.759	2.810.242	3.602.631	4.070.791
Total Portugal	902.990	929.202	1.028.581	1.150.723	1.259.158	1.234.361	1.427.440	1.580.616	1.720.847
Total Espanha	7.665.338	8.369.904	8.937.104	9.871.921	10.304.495	9.134.247	9.658.671	10.728.873	11.099.167
Total Iberico	8.568.328	9.299.106	9.965.685	11.022.644	11.563.653	10.368.608	11.086.111	12.309.489	12.820.014

TEUs

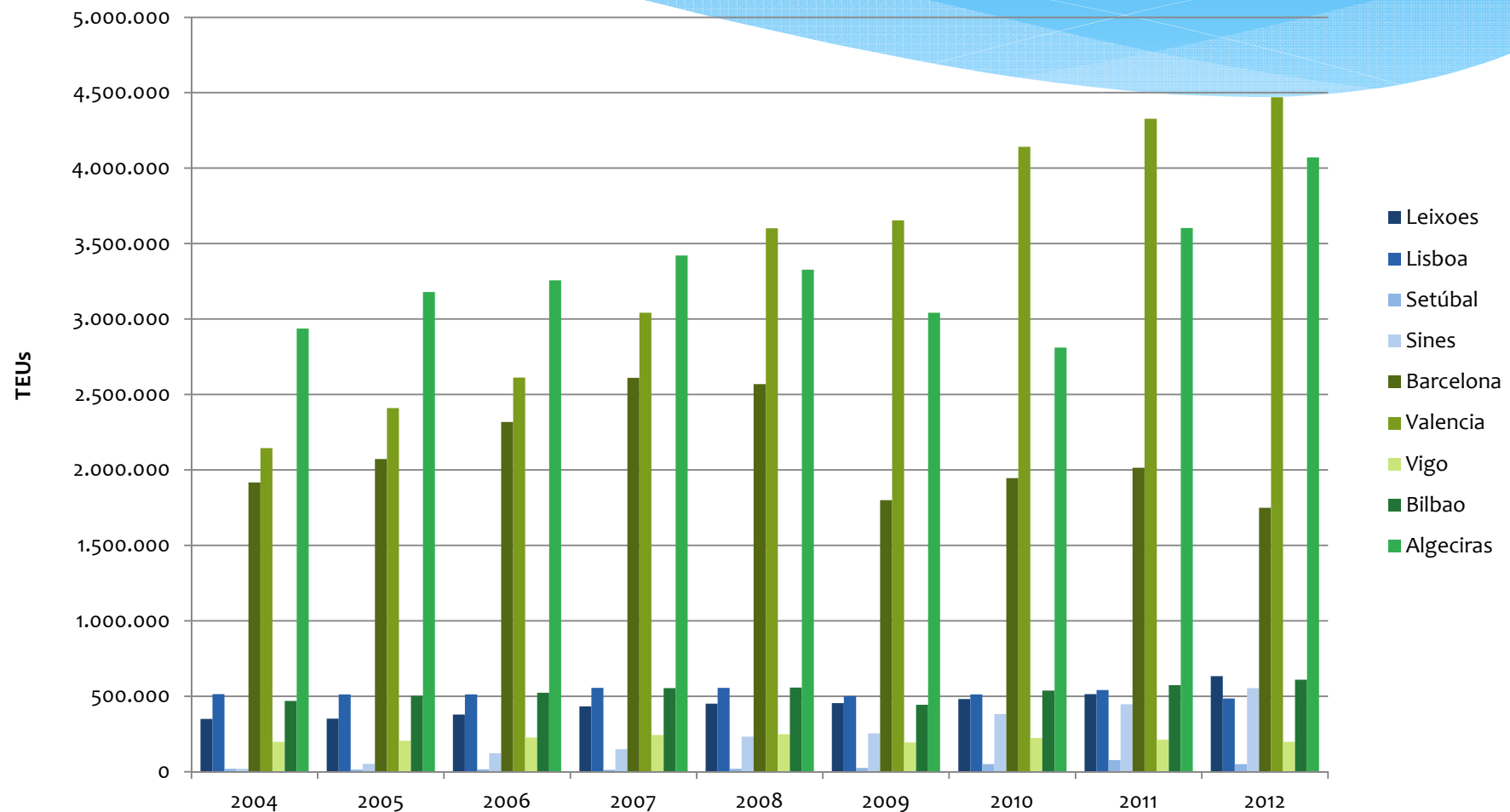
Iberia Container Movement



Iberia Ports Container Movement



Iberia Ports Container Movement



Global Container Movement in Iberia (TEU's)

Market Growth

Ports	2005	2006	2007	2008	2009	2010	2011	2012	Average
Leixoes	0,7%	7,5%	14,6%	3,8%	1,0%	6,0%	6,7%	23,1%	7,9%
Lisboa	-0,3%	-0,1%	8,2%	0,2%	-9,9%	2,4%	5,7%	-10,4%	-0,5%
Setúbal	-32,6%	19,7%	-21,0%	60,6%	27,8%	98,9%	52,0%	-36,0%	21,2%
Sines	165,4%	139,2%	23,0%	55,4%	8,7%	50,7%	17,1%	23,6%	60,4%
Barcelona	8,1%	11,9%	12,6%	-1,6%	-29,9%	8,1%	3,5%	-13,1%	-0,1%
Valencia	12,3%	8,4%	16,5%	18,4%	1,4%	13,4%	4,5%	3,3%	9,8%
Vigo	4,2%	10,4%	7,6%	1,6%	-21,8%	14,7%	-4,6%	-6,4%	0,7%
Bilbao	7,4%	3,8%	6,0%	0,5%	-20,4%	21,3%	6,4%	6,5%	4,0%
Algeciras	8,2%	2,4%	5,0%	-2,7%	-8,6%	-7,6%	28,2%	13,0%	4,7%
Total Portugal	2,9%	10,7%	11,9%	9,4%	-2,0%	15,6%	10,7%	8,9%	8,5%
Total Espanha	9,2%	6,8%	10,5%	4,4%	-11,4%	5,7%	11,1%	3,5%	5,0%
Total Iberico	8,5%	7,2%	10,6%	4,9%	-10,3%	6,9%	11,0%	4,1%	5,4%

Global Container Movement in Iberia (TEU's)

Market Share Iberia

Ports	2004	2005	2006	2007	2008	2009	2010	2011	2012	Average
Leixoes	4,1%	3,8%	3,8%	3,9%	3,9%	4,4%	4,3%	4,2%	4,9%	4,1%
Lisboa	6,0%	5,5%	5,1%	5,0%	4,8%	4,8%	4,6%	4,4%	3,8%	4,9%
Setúbal	0,2%	0,1%	0,2%	0,1%	0,2%	0,2%	0,5%	0,6%	0,4%	0,3%
Sines	0,2%	0,5%	1,2%	1,4%	2,0%	2,4%	3,4%	3,6%	4,3%	2,1%
Barcelona	22,4%	22,3%	23,3%	23,7%	22,2%	17,4%	17,6%	16,4%	13,7%	19,9%
Valencia	25,0%	25,9%	26,2%	27,6%	31,2%	35,2%	37,4%	35,2%	34,9%	30,9%
Vigo	2,3%	2,2%	2,3%	2,2%	2,1%	1,9%	2,0%	1,7%	1,5%	2,0%
Bilbao	5,5%	5,4%	5,2%	5,0%	4,8%	4,3%	4,9%	4,7%	4,8%	4,9%
Algeciras	34,3%	34,2%	32,7%	31,0%	28,8%	29,3%	25,3%	29,3%	31,8%	30,7%

Análise de Posicionamento Estratégico

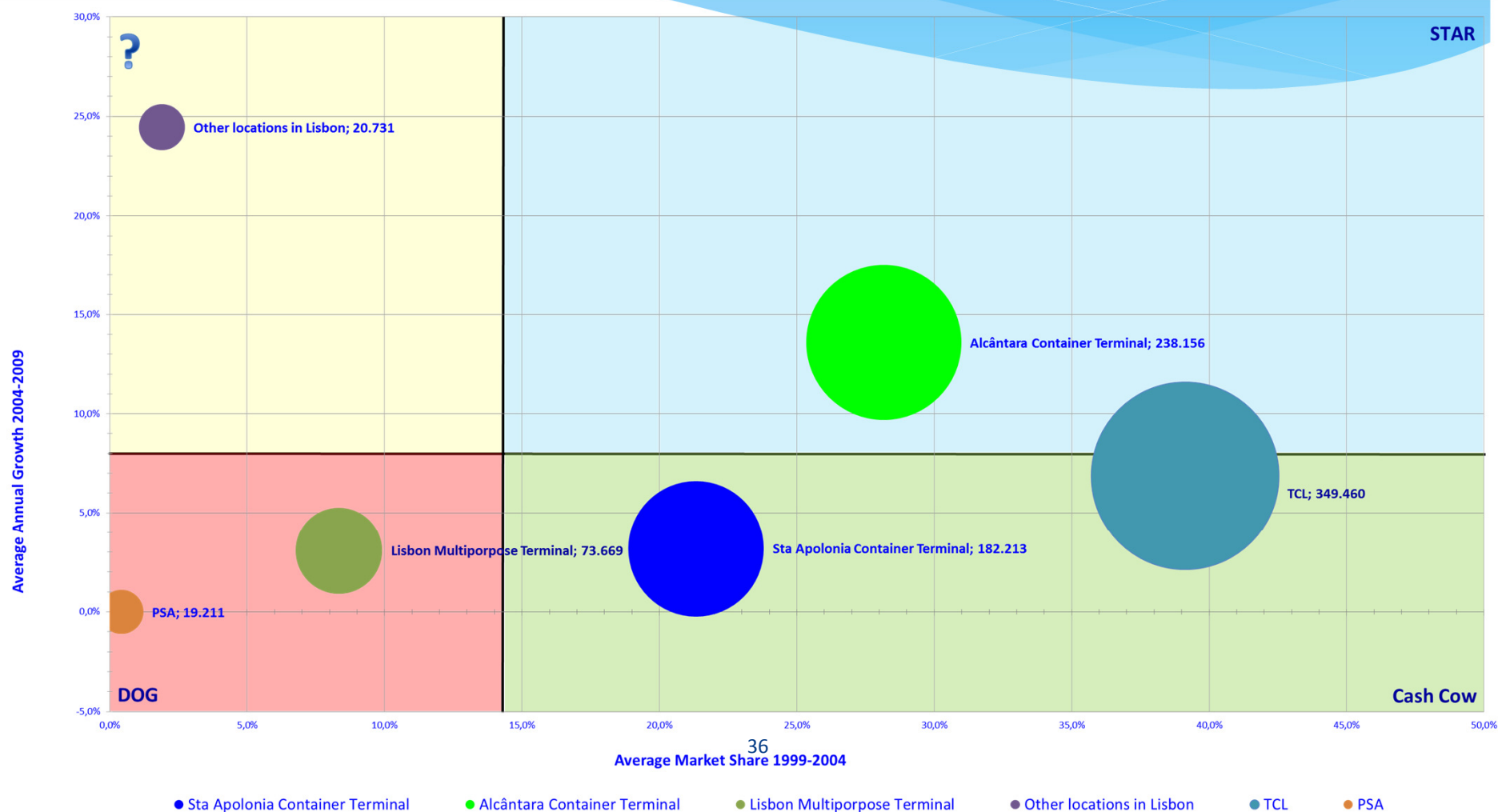
Matriz BCG (Boston Consulting Group)



Posicionamento Estratégico dos Terminais de Contentores em Portugal

Matriz BCG

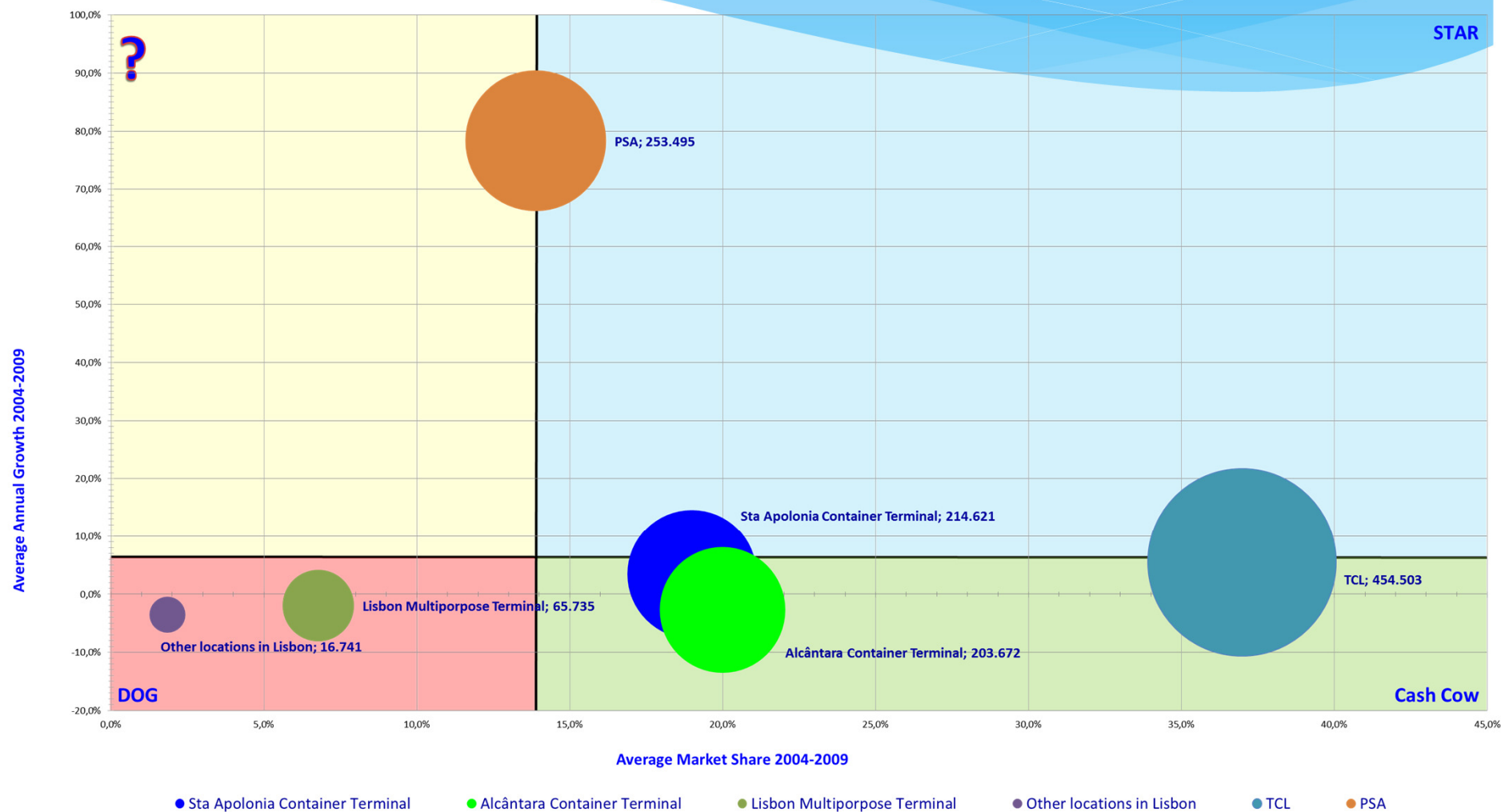
Portuguese Container Terminals TEU Movement Analysis - 1999/2004



Posicionamento Estratégico dos Terminais de Contentores em Portugal

Matriz BCG

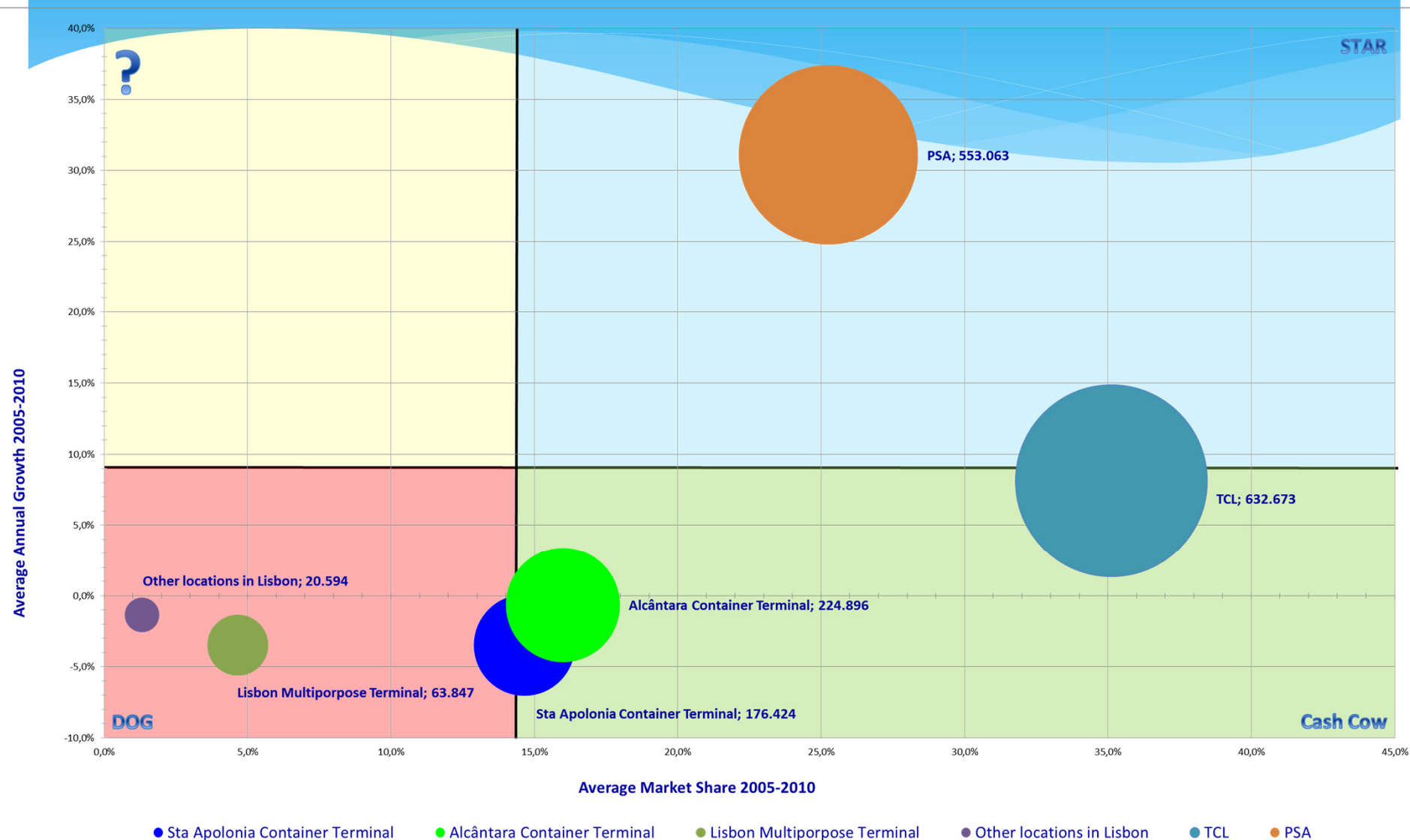
Portuguese Container Terminals TEU Movement Analysis - 2004/2009



Posicionamento Estratégico dos Terminais de Contentores em Portugal

Portuguese Container Terminals TEU Movement Analysis - 2007/2012

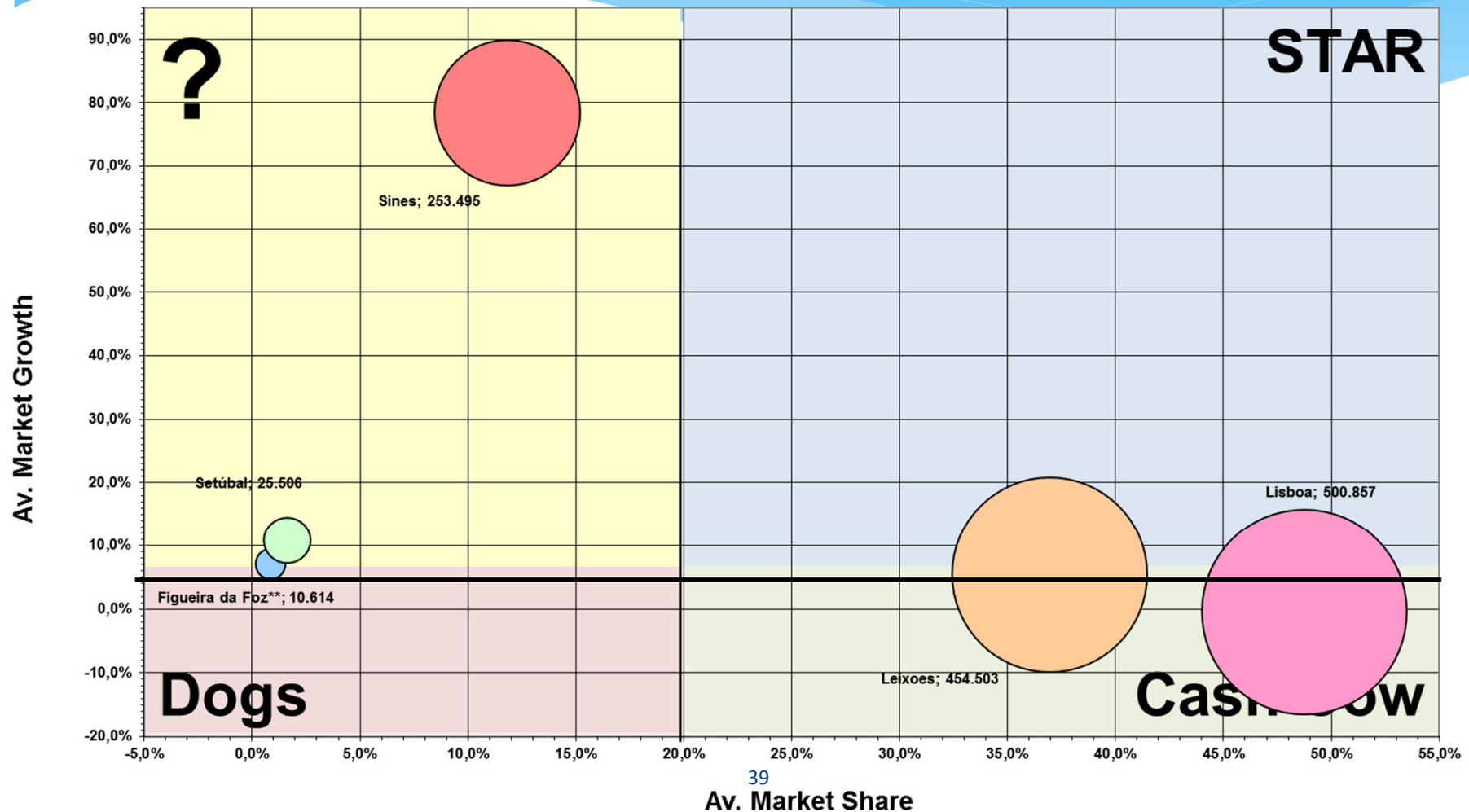
Matriz BCG



Posicionamento Estratégico dos Portos Portugueses

Matriz BCG

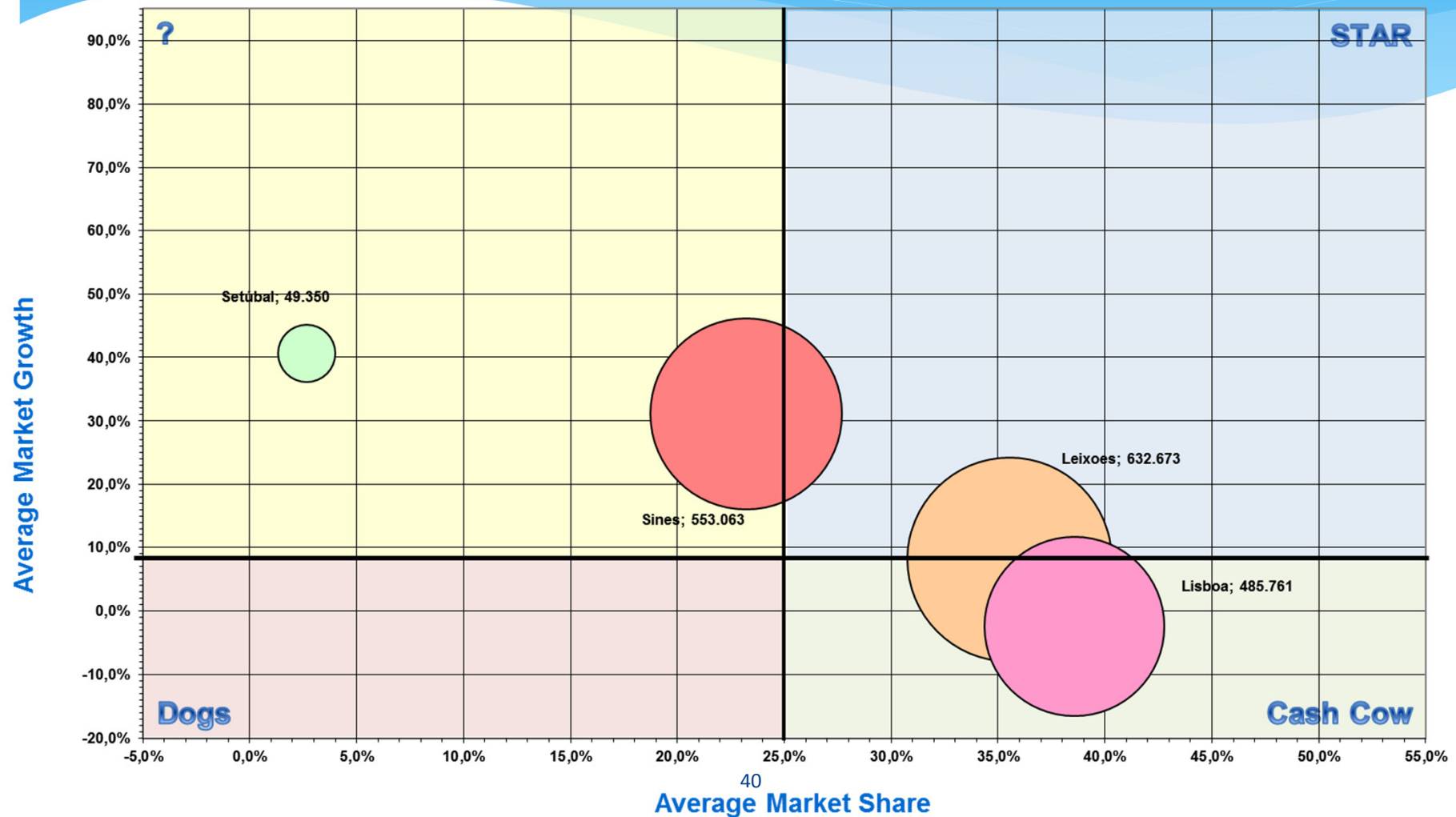
Total TEU Port Analysis 2004/2009



Posicionamento Estratégico dos Portos Portugueses

Matriz BCG

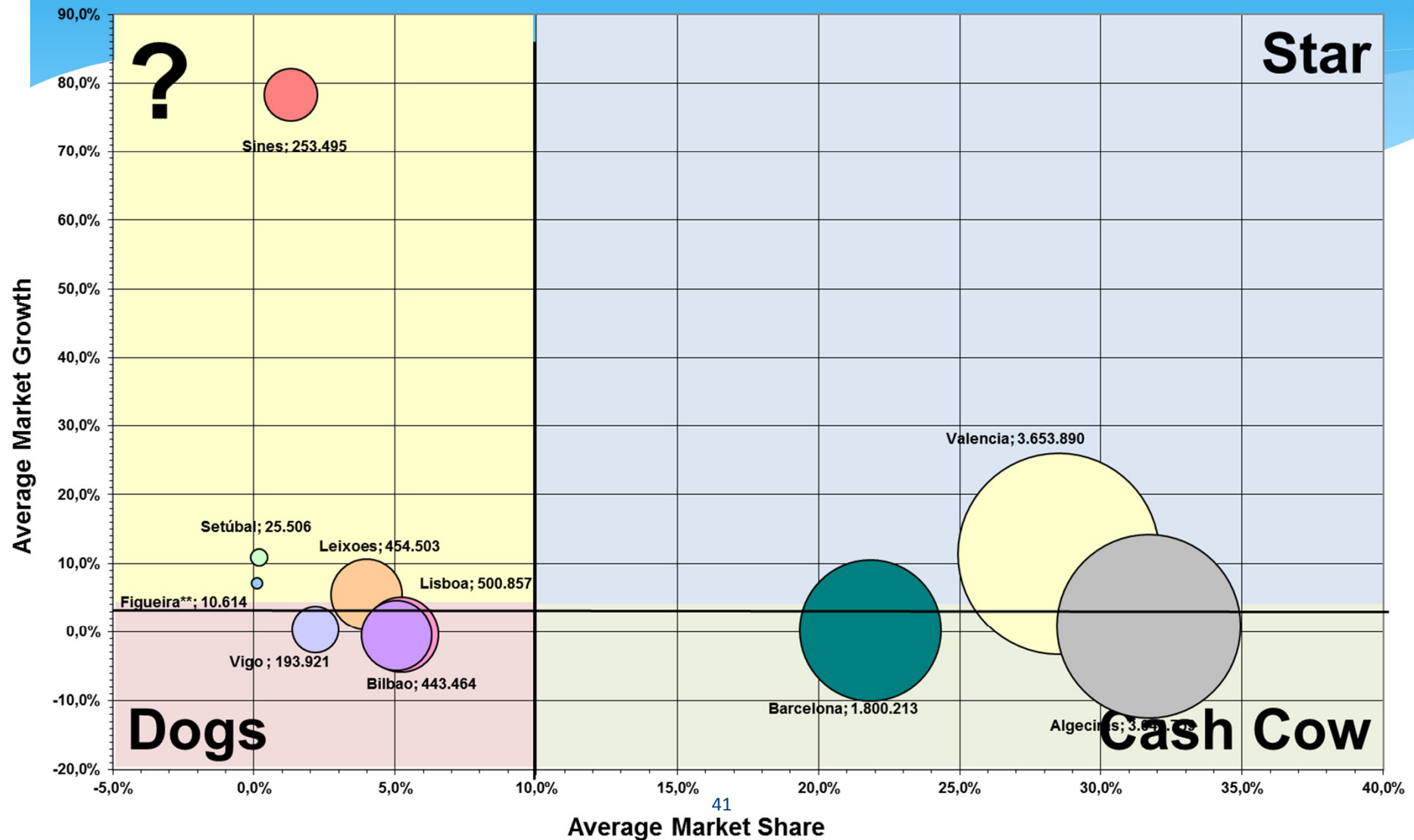
Total TEU Port Analysis 2005/2012



Posicionamento Estratégico dos Portos Ibéricos

Matriz BCG

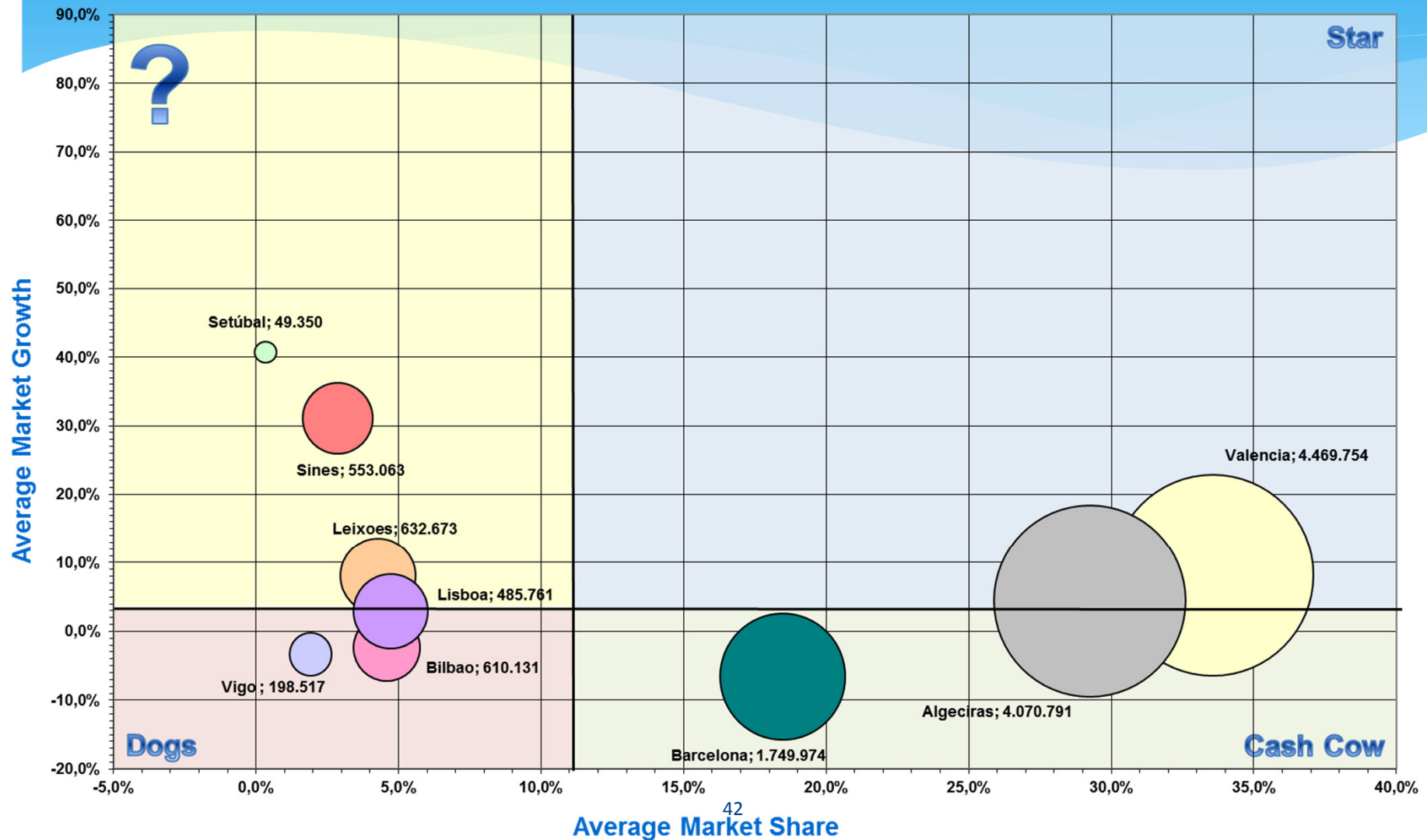
Total TEU Port Analysis 2004/2009



Posicionamento Estratégico dos Portos Ibéricos

Matriz BCG

Total TEU Port Analysis 2005/2012

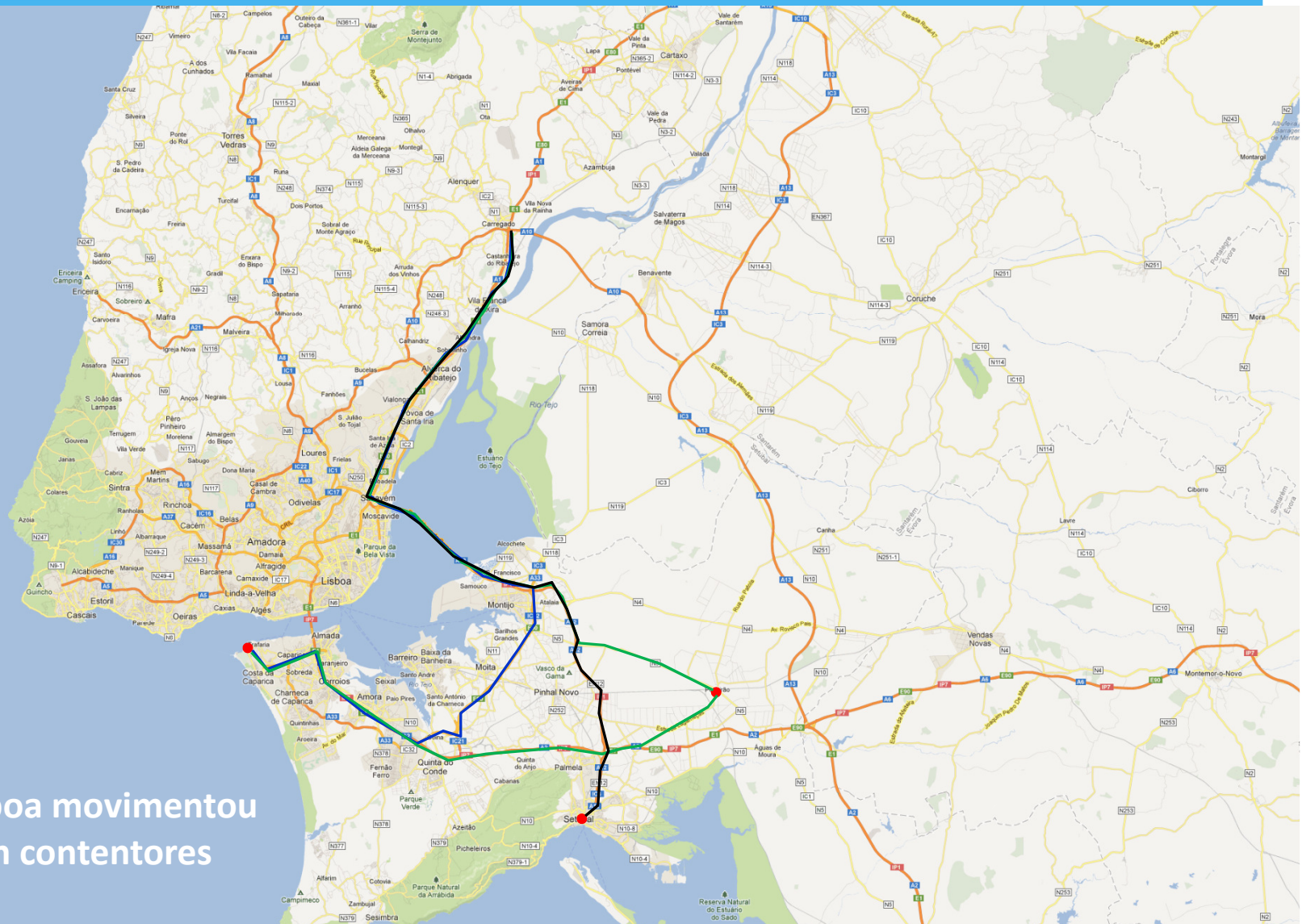


O que queremos dos nossos Portos

- ☐ Aproveitá-los como recursos para o desenvolvimento da economia
 - ☐ Movimento de carga
 - ☐ Cadeias logísticas nacionais e internacionais
 - ☐ Transshipment
 - ☐ Turismo (Cruzeiros)
- ☐ Transformá-los em zonas de lazer sem utilidade produtiva

O Porto de Lisboa e os Contentores

Em 2012
o Porto de Lisboa movimentou
4.911.304 T em contentores

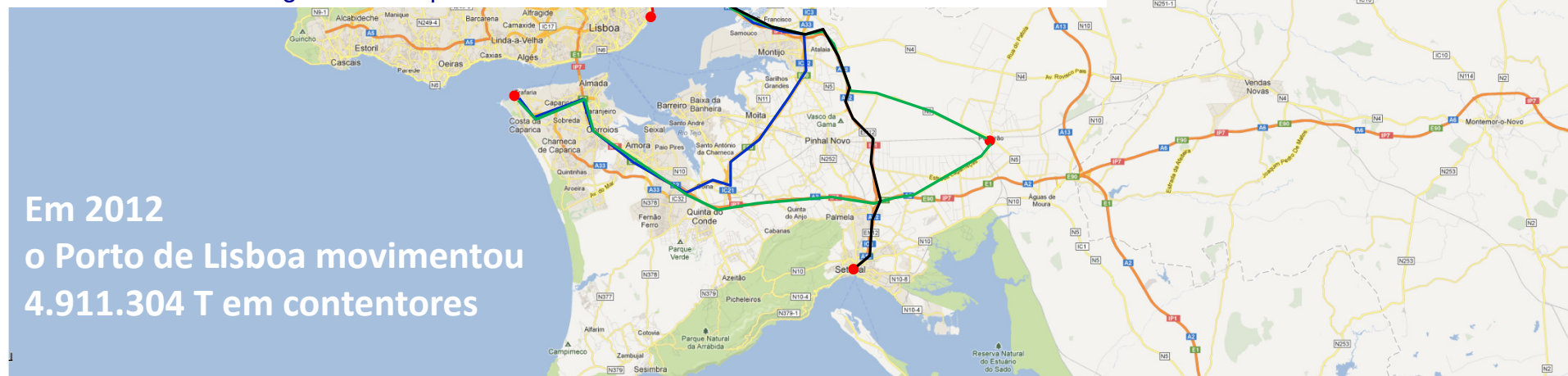
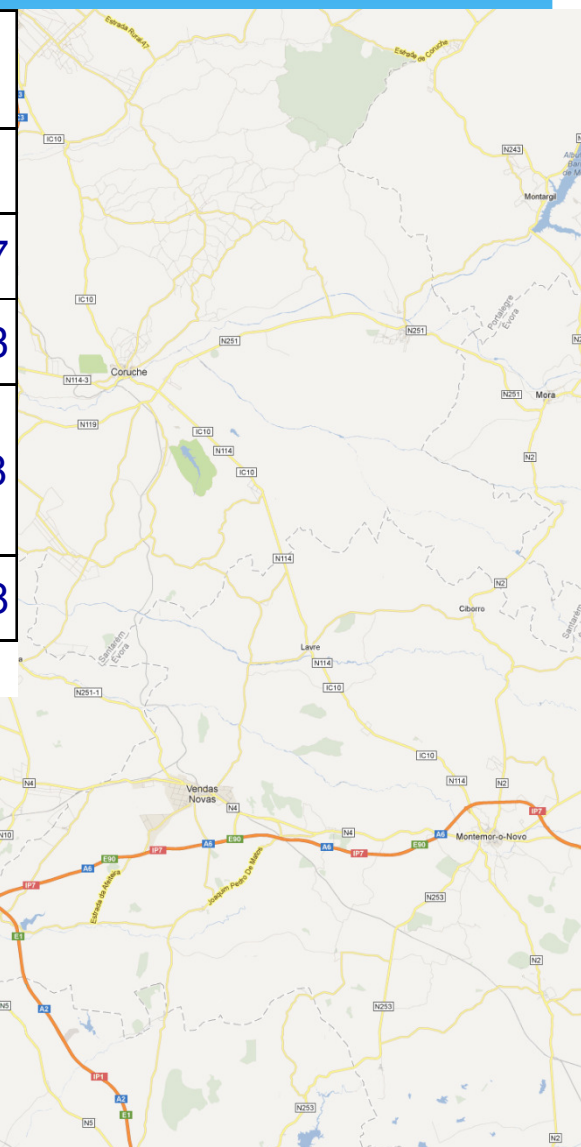


O Porto de Lisboa e os Contentores

De	Para	Km	Dif	1.000 T.Km	CEM ¹ Eur/ano
Sta Apolonia	Carregado	30			
Trafaria	Carregado	88	58	284.856	9.969.947
Setúbal	Carregado	66	36	176.807	6.188.243
Trafaria	Poceirão	55	90	442.017	15.470.608
Poceirão	Carregado	65			
Sines	Carregado	168	138	677.760	23.721.598

¹ - Custos Externos Marginais. Transporte Rodoviário Eur 35/1.000 T.Km

Em 2012
o Porto de Lisboa movimentou
4.911.304 T em contentores



Leixões





Sines

An aerial photograph of Sines, Portugal, showing the city, harbor, and surrounding landscape. The city is built on a peninsula, with a large harbor area to the west and a smaller bay to the east. The harbor is filled with ships and piers. The surrounding landscape is a mix of urban development, agricultural fields, and some industrial areas. A large dam or breakwater extends into the sea on the right side of the image. The word "Sines" is written in white text in the bottom left corner.



Setúbal



O que queremos dos nossos Portos

Conclusões

- ❑ A análise das várias soluções deve ser realizada numa óptica do interesse Nacional
 - ❑ Ouvindo as instituições regionais e locais
 - ❑ Análise técnica, profissional
 - ❑ Interesse económico para o País (rácio benefício/custo mínimo de 3:1 no que diz respeito aos investimentos públicos necessários e com período de pay-back aceitável)
 - ❑ Viabilidade técnica e operacional do projecto
 - ❑ Viabilidade Financeira do projecto. Investimento Privado
 - ❑ O impacte ambiental

O que queremos dos nossos Portos

Conclusões

- ☐ Ter as autarquias envolventes como parceiros das Administrações Portuárias
 - ☐ Repartindo os benefícios financeiros
 - ☐ Gestão participativa
- ☐ Procurar as melhores soluções económicas para o País e para a criação de riqueza e de emprego de forma sustentável
- ☐ Abolir os regionalismos radicais e os interesses sectoriais que nada trazem de bom para o País

O que queremos dos nossos Portos

Conclusões

- ☐ Ter em atenção com quem concorreremos
- ☐ Saber qual ou quais os mercados que nos interessa servir
- ☐ Saber o que queremos
- ☐ Ter um plano estratégico integrado de todo o sistema portuário nacional e levá-lo até ao

FIM

An aerial photograph of the Barcelona port area, showing the city of Barcelona, the Llobregat river, and the port facilities. The BEST terminal is highlighted with a green triangle. The text is overlaid on the left side of the image.

Barcelona Europe South Terminal (BEST) is the first semi-automated terminal in the HPH Group and the most technologically advanced port development project in Spain.

It is capable of serving multiple mega-vessels simultaneously and has an eight-track railway facility, the biggest on-dock railway terminal of any port in the Mediterranean connecting it to traffic coming from, and destined for, Southern Europe.

BEST
Barcelona
Europe
South
Terminal



Barcelona