

THE NEW ECONOMIC PORT LANDSCAPE

Growth and competition

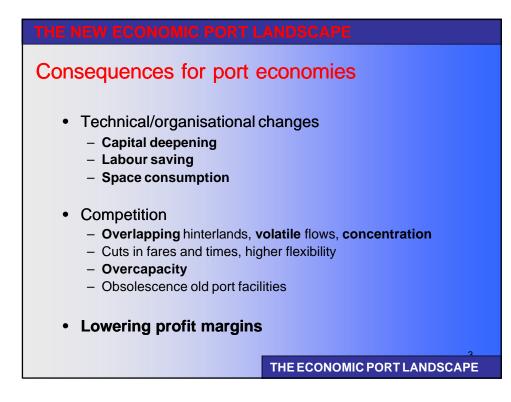
Deep changes in transport economics

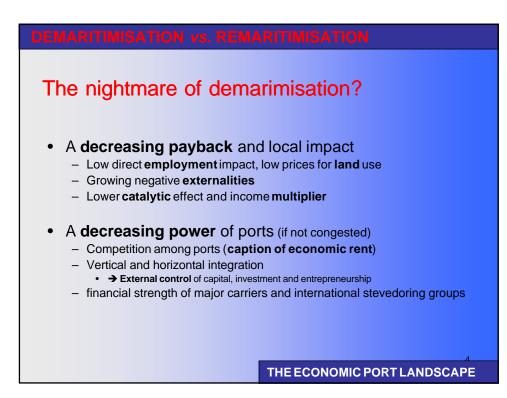
- Increasing ships' size
- Unitization and intermodality
- Horizontal and vertical integration
- Logistics outsourcing

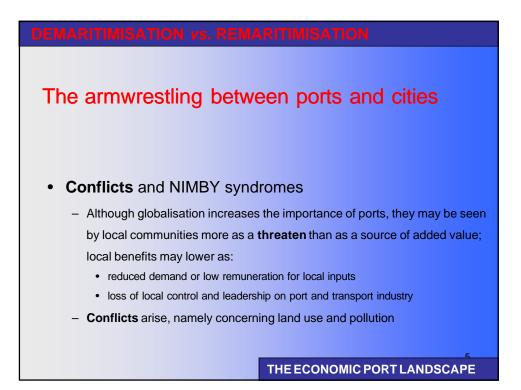
Exponential growth in seaports' throughput

- growth in seaborne trade (annual rate twice as big as industrial production)
- global relocation of industrial activities
- geographical changes in raw material markets and consumption patterns

THE ECONOMIC PORT LANDSCAPE







DEMARITIMISATION vs. REMARITIMISATION

Between de- and re-maritimisation

De-maritimisation does not affect all ports, depending on:

- opportunity costs (due to the actual scarcity) of land and other resources;
- local benefits, namely direct and induced employment impact

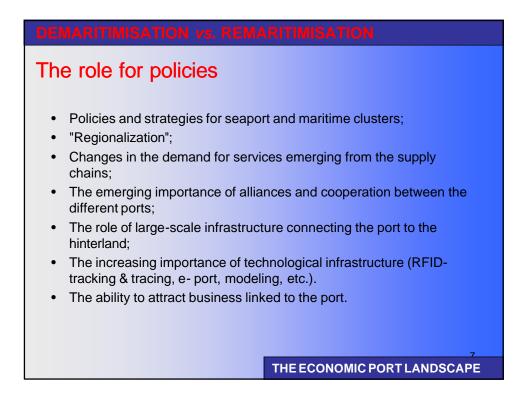
Trade off between different (partly conflicting) goals:

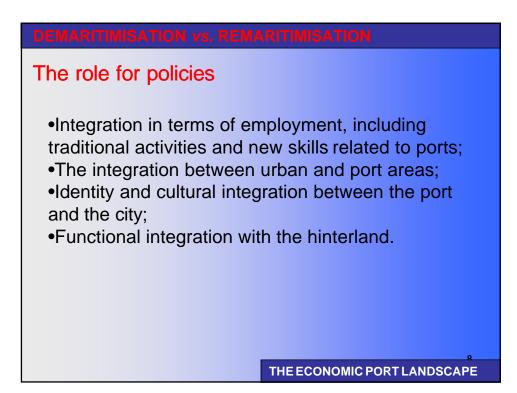
- Utility for shipowners, transport operators, and indirect users
- Local impact (yield, added value, employment, environment, quality of life).

Port policies should increase the value of ports for the local

economy, thus reinforcing links and preventing social conflicts

- increasing the (local) net benefits
- reducing the land and collective/environmental resources employed
- stabilising effects over time







EMARITIMISATION vs. REMARITIMISATION

The role for policies

"It is clear that the primary motivation for container terminal automation cannot be seen as increased productivity," said, ports and editor of the report.".."Rather it is all about replacing labour costs with capital costs" (Neil Davidson, Drewry's senior advisor - Drewry Report "Container Terminal Capacity and Perfomance Benchmarks", 2011)

