

**29.07.2014**

## **Presse-Echo**

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# Hamburg Süd

Seatrade Global vom 29.07.2014

Autor: Marcus Hand

## Hamburg Sud set to become 8th largest box line with CCNI merger

Hamburg Sud is set to become the world's largest eighth largest container line by the end of this year through a combination of taking over Compañía Chilena de Navegación Interoceánica (CCNI) and newbuilding deliveries over the next five months according to Alphaliner.

The German liner company announced at the end of last week it had made \$160m bid to acquire CCNI. The deal is expected to be completed by the end of December subject to due diligence and regulatory

approvals.

According to Alphaliner's weekly newsletter CCNI currently operates 59,800 teu in capacity, and the deal includes four 9,030 teu chartered in vessels delivering in 2014 and 2015. Meanwhile Hamburg Sud has 103,000 teu in new capacity to be delivered over the next three years.

As of the date of the announcement Alphaliner said it would give the merged company a fleet capacity of 559,800 teu currently moving the

German line up from 13 to 11 in the global rankings ahead of Nippon Yusen Kaisha (NYK) and Orient Overseas Container Line (OOCL). By the time the merger is complete at the end of the year Hamburg Sud is set to move up three more places to the number eight position with 80,000 teu in new deliveries over the next five months, taking it ahead of Mitsui OSK Lines (MOL), APL and Hanjin Shipping.

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The Loadstar vom 28.07.2014

Autor: Mike Wackett

## Rationalisation the driver for Hamburg Sud's CCNI acquisition

Rationalisation is the driver of Hamburg Sud's announced preliminary agreement for the acquisition of the container liner activities of the 28th-ranked Chilean carrier CCNI, which it says will entail the integration of the Latin American liner services of the Urenda family-owned, Grupo Empressa Navieras subsidiary into its own network.

Indeed, in its 2013 annual operational report the family-owned Oetker Group liner company complained of "rate pressures" on the Asia-South America trade lanes where CCNI currently operates 12 5,550-6,500teu ships on its weekly China Express Service (CEX), and 10 5,500teu vessels on its Asia Express Service (NAX).

Subject to due diligence and the approval by regulators Hamburg

Sud says that it hopes to close the reported \$160m deal by 31 December 2014 which it said will result in the "merging of the dedicated and experienced workforce" of the two companies.

Back in April CCNI president and chairman Beltran Urenda Salamanca said it was talking to other carriers and admitted that one of those was Hamburg Sud. And commenting on the parlous state of the container liner industry he said at the time: "We have come to the conclusion that the future is to get associated or die."

Following the ill-fated engagement between Hamburg Sud and compatriot Hapag-Lloyd, the latter moved on to acquire the container activities of Chile's largest carrier CSAV which on the expected completion at the

year-end will propel the "new" Hapag-Lloyd above Evergreen to 4th in the carrier rankings.

In comparison, Hamburg Sud's deal is much smaller and by adding CCNI's current 60,000teu capacity to its own nominal 500,000teu the German carrier will overtake NYK and OOCL to become the 11th biggest container line.

However, the agreement also includes the 12-year charter of four 9,300teu ships currently under construction by HHIC in the Philippines, which formed part of CCNI's upgrade plans for its Chinese services and are stemmed for delivery late 2014 and early 2015. Moreover, Hapag-Lloyd must wrestle with a legacy of losses from its own operation and that of CSAV which saw the liners post a combined net loss of

\$232m in the first quarter of the year following the red ink spilled in 2013. In contrast although CCNI saw its profits tumble in 2013 to \$160,000, from the \$9.2m of the previous year, it was among the few container lines that actually made a positive return last year.

Hamburg Sud does not report its full financial results but said in its 2013 overview that it was “doing well under difficult business conditions” reporting a 3.9% decline in its turno-

ver to \$5.3bn against a 1.1% increase in its liftings at 3.3m teu. And 2014 seems to be proving an even more challenging year for Hamburg Sud. Not only are its Asia-South America services under freight rate pressure, but its services between Europe and Latin America are also being squeezed due to lower demand.

In today’s Container Insight Weekly, Drewry Maritime Research reports that cargo from Europe to the East

Coast of South America continued its decline in May, reaching just 66,000teu – 8% below April’s total, which was in turn 9% below the March high of 79,000teu.

Drewry said that carriers were also hit by declining cargo volumes from the east coast of South America back to Europe, with liftings down to 64,000teu in May compared to 65,000teu and 69,000teu for April and March respectively.

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Fruitnet.com vom 28.07.2014

## Hamburg Süd picks up CCNI

German shipping group acquires container line activities of Chilean group Compañía Chilena de Navegación Interoceánica

Compañía Chilena de Navegación Interoceánica (CCNI). and Hamburg Süd have announced that they have signed a preliminary agreement whereby Hamburg Süd will acquire the container liner activities of CCNI. The move includes related general agency functions – subject to due diligence – execution of a sale & purchase agreement and approval

by the competent authorities. This acquisition is scheduled to be executed by the latest on 31 December 2014.

The German shipping group intends to strengthen its liner network to and from South America by integrating the CCNI liner services. Merging the dedicated and experienced workforce of CCNI and HSDG will help to

create an even stronger organization that will provide a first class service to the customers of both companies.

Following the transaction CCNI will continue its non-liner shipping activities including the car carrier and ship-owning business.

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## CCNI to see gain

Compania Chilena de Navegacion Interoceanica (CCNI) says it will add \$85m to its financial result through the sale of its liner business to Germany's Hamburg Süd.

The Chilean ship operator, whose car carrier and shipowning businesses unaffected by the \$160m transaction deal, announced the transaction earlier today.

In a disclosure to security regulators, Jose Luis Chanes-led CCNI said the sale includes its terminals, container yard and some of its agency business.

The Valparaiso-headquartered company's 9,000-teu quartet under construction at Hanjin Heavy Industries & Construction's (HHIC) Subic Shipyard in the Philippines will be included in the deal through a 12-year

chartering arrangement.

The agreement is expected to close no later than the end of the year.

Shares in CCNI's largest shareholder, Urenda family-backed Empresas Navieras, surged by 11.5% today, hitting CPL 14,500 (\$25.78) on the Santiago Stock Exchange.

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Täglicher Hafenbericht vom 29.07.2014

## Hamburg Süd kauft die chilenische Reederei CCNI

Liniendienste werden integriert - Übernahme bis Ende 2014 geplant

Die Hamburg Süd wird die Containerliniendienste und dazugehörigen Agenturfunktionen der chilenischen Reederei Compania Chilena de Navegacion In-teroceánica S.A. (CCNI) mit Sitz in Valparaiso/Chile übernehmen. Darauf hat sich die Geschäftsführung der Hamburg Südamerikanische Dampfschiffahrts-Gesellschaft (Hamburg Süd) mit den Eigentümern der CCNI vorläufig geeinigt, teilte die zum Bielefelder Oetker-Konzern gehörende Reederei jetzt weiter mit. Nach Durchführung der Due Diligence, dem Abschluss des Kaufvertrages sowie Genehmigungen durch die zuständigen Behörden ist die Übernahme spätestens für den 31. Dezember 2014 vorgesehen. Über die Größenordnung der Transaktion wurden allerdings keine Angaben gemacht. Durch die Integration der

CCNI-Liniendienste will die Hamburg Süd ihr Liniennetzwerk von und nach Südamerika stärken. Die Zusammenführung der Mitarbeiter von CCNI und Hamburg Süd werde die gemeinsame Organisation festigen und in die Lage versetzen, den Kunden beider Gesellschaften erstklassige logistische Dienstleistungen anzubieten. Nach der Übernahme der Linienaktivitäten der CCNI durch die Hamburg Süd werden die bei den Verkäufern verbliebenen Aktivitäten fortgeführt. Dabei handelt es sich unter anderem um Beteiligungen an Car Carrier Transport Services und Schiffseigentums-gesellschaften. Die Hamburg Süd war schon länger an einem Ausbau der Südamerika-Strecke interessiert. CCNI hat im vergangenen Jahr einen Umsatz von rund 700 Millionen Euro erzielt. Hamburg Süd

erreichte knapp 5,3 Milliarden Euro. Das entsprach einem Rückgang von knapp vier Prozent. Probleme hatten der Reederei sowie der ganzen Branche sinkende Fracht- und Chartersraten bereitet. Das Containergeschäft leidet seit Jahren zudem unter Überkapazitäten und steigenden Treibstoffpreisen. Entsprechend hoch ist der Konsolidierungsdruck. Der Lokalrivale von Hamburg Süd, die ebenfalls in der Hansestadt ansässige Hapag-Lloyd, wird sich mit der Containersparte der chilenischen CSAV zusammenschließen. Auch Hamburg Süd hatte schon Gespräche mit Hapag-Lloyd geführt, die jedoch scheiterten.

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## Hamburg Süd kauft chilenische CCNI

### 160 Mio. USD für Containerliniendienste

Seeschiffahrt Hamburg Süd übernimmt die Containerliniendienste und dazugehörigen Agenturfunktionen der chilenischen Reederei CCNI. Darauf habe man sich mit den Eigentümern geeinigt, teilte die Linienreederei am Freitag mit. Nach Durchführung der Due Diligence, dem Abschluss des Kaufvertrages sowie Genehmigungen durch die zuständigen Behörden soll die Übernahme bis Ende des Jahres abgeschlossen sein. In einer Börsenmitteilung nennt CCNI einen Kaufpreis

von 160 Mio. USD. CCNI hat laut Alphaliner 17 Schiffe mit 59914 Teu Kapazität eingechartert. Der Carrier hat allerdings vier 9000-Teu-Schiffe geordert. Im vergangenen Jahr transportierte das Unternehmen 310000 Teu. Der Umsatz erreichte 841,5Mio.USD, der Nettogewinn lag bei 0,16Mio.USD. Darin enthalten sind aber auch Beteiligungen im Car-Carrier-Geschäft und an Schiffseigentumsgesellschaften. Diese verbleiben bei den Eigentümern. CCNI ist vor allem an der süd-

amerikanischen Westküste und folglich auf dem Pazifik stark. Die Reederei läuft aber auch die US- sowie die südamerikanische Ostküste und den Golf von Mexiko an. Hamburg Süd kooperiere bereits mit dem Carrier - beispielsweise bei einem Dienst zwischen der südamerikanischen Westküste und Asien sowie zwischen der Westküste und der US-Ostküste, so eine Sprecherin gegenüber der DVZ. (sr)

# Andere Reedereien / Other Shipping Lines

Seatrade Global vom 29.07.2014

Autor: Lee Hong Liang

## China expresses concerns over 2M alliance of Maersk, MSC

The Chinese government and the influential China Shipowners' Association (CSA) have expressed concerns over the recently proposed 2M container shipping alliance between Maersk Line and Mediterranean Shipping Co (MSC).

Shang Ming, chief of the anti-monopoly bureau at China's ministry of commerce, said in an interview to the local media that the formation of the 2M alliance may result in lower bargaining power for China's import and export enterprises.

The potential freight shipping price monopoly by 2M would hence lead to higher costs of consumer goods, Shang believed.

Zhang Shouguo, executive vice chairman of CSA, anticipated that the 2M alliance would further raise

the competitiveness of Maersk Line and MSC, posing greater challenges for Chinese shipping lines.

Zhang pointed out that while seven of the world's top 10 busiest container ports are in China, Chinese shipping carriers only accounted for less than one-third of the market share.

The proposed 2M alliance is a 10-year vessel sharing agreement between Maersk Line and MSC on the Asia-Europe, transatlantic and transpacific container trade lanes. The alliance will encompass 185 vessels with a capacity of 2.1m teu deployed on 21 strings.

The announcement of the 2M alliance on 10 July comes less than four weeks after the grander P3 alliance between Maersk Line, MSC and CMA CGM was rejected by

China.

Both Zhang and Shang did not specifically object to the 2M alliance, but they highlighted that the global market share of Maersk Line and MSC is 14.5% and 13.4% respectively, giving them a total share of 27.9%. In Asia alone, the combined market share of Maersk Line and MSC could be up to 35.8%.

Given that the P3 fell at the hurdle of the Chinese approval, all eyes will be on the Chinese authority's reactions to 2M.

China's ministry of commerce had rejected the P3 alliance due to its combined 47% market share on the Asia-Europe trade, potentially bringing about "adverse effects on restricting competition".



Tradewinds vom 25.07.2014

Autor: Gary Dixon

## Near miss for Maersk

A Maersk boxship needed a tow after a near miss with a sandbank off New Zealand.

The 3,078-teu Maersk Batur (built 2009) lost power while navigating Otago Harbour and was pulled into deeper water by two tugs, in an April incident that has only just emerged.

It was reported by Port Otago to Maritime New Zealand (MNZ), the Transport Accident Investigation Commission (TAIC) and Otago's harbour master.

But MNZ has, since February, suspended publishing its monthly incident summaries, as it considers privacy issues, the Otago Daily Times said.

It only came to light in parliamentary question time.

Maersk Batur was reported as having had "possible contact" with sand at the edge of the channel in

Otago Harbour.

Maersk NZ operations manager Stuart Jennings said he understood there had been a "fuel-flow failure", leading to the vessel's master dropping anchor and restarting the engine, all of which had taken only a "short time", he said.

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Lloyd's List vom 28.07.2014

Autor: Janet Porter

## Evergreen to start own Rotterdam-Dublin feeder

Taiwan line also upgrades Liverpool services

EVERGREEN Line is to operate its own feeder link between Rotterdam and Dublin as part of a local network revamp that includes an upgrade of its Liverpool service.

From its hub in Rotterdam, the Taiwan line plans to offer a twice-weekly service to Dublin and dedicated slots on a weekly basis to Liverpool in a move designed to more effectively integrate its services to and from the north of England and Ireland into its global network.

Evergreen will run its own independent service on a weekly shuttle basis between Rotterdam and Dublin and will also start a slot

exchange arrangement with common carrier X-PRESS feeders on its weekly Dublin service from Rotterdam.

As part of the same slot exchange, Evergreen said it will also take space on the X-PRESS weekly service to Liverpool, also connecting to deepsea services via the line's Rotterdam hub.

Overall transit times to and from both ports will be enhanced and there will be an increased ability to co-ordinate the transshipment of cargo at Rotterdam.

Evergreen said in a statement that in

addition to allowing its customer base on Merseyside and in the Republic of Ireland greater access to its worldwide service network, it believes the new initiative will also better serve other regions of the UK, including the north of England, the Midlands and Scotland.

The Evergreen operated 698 teu Vega Stockholm is due to make its inaugural sailing on the Dublin service from Rotterdam on July 30.

The slot arrangement on both X-PRESS services to Dublin and Liverpool will also start this week.

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**Autor:** Ritzau Finans

## OOCL once again saw volumes grow and rates drop

Orient Overseas Container Lines, OOCL, loaded more than 11 percent more containers in April, May and June, but the lower rate level can be felt.

Container carrier OOCL saw strong growth in April, May and June, for the third straight quarter. But as has been the case in many more consecutive quarters, the growth in revenue was unable to keep up due to low rates.

The Hong Kong based carrier, whose full name is Orient Overseas Container Lines, increased its ship capacity by 2.1 percent in the quarter, but loaded 11.2 percent more

containers on board the ships, compared to the second quarter 2013. However, the carrier's revenue only grew 6.8 percent, to USD 1.50 billion, which corresponds to an average rate decline of 4.0 percent.

OOCL grew its traffic on Asia-Europe, in particular, where the company transported 254,067 teu, which amounts to a growth of 22.1 percent. And the carrier actually managed to raise the price on these, as revenue on the route increased

24.4 percent.

On the other hand, all the carrier's other three routes experienced weaker rates: across the Pacific, across the Atlantic, and on intra-Asia - the latter of which is OOCL's biggest market by far.

The last quarter in which OOCL's average rates grew - measured by year - was in the first three months of 2013.

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**Autor:** Ole Andersen

## Qatar takes control of rapidly growing container carrier

According to a petition submitted to the US Federal Maritime Commission, Qatar has amassed a controlling stake in United Arab Shipping Company (UASC), which is one of the fastest growing container carriers, according to Alphaliner.

Oil state Qatar has become a controlling stakeholder in the rapidly growing Arabian container carrier United Arab Shipping Company (UASC). This is evident from documents submitted to the US Federal Maritime Commission (FMC) in June, where the carrier requests to be exempted from the special, increased requirements that apply to state-controlled carriers in the US.

According to analysts Alphaliner, the government in Qatar has increased its ownership stake in UASC to 51.27 percent, a fact that makes UASC a so-called "controlled carrier"

as defined by US rules. The increased rules were introduced in US maritime law many years ago in an effort to prevent state-controlled carriers from manipulating freight rates by dumping prices to force competitors out of the market. Instead these carriers are subject to a 30-day notice period before reducing tariffs, while private carriers can reduce their rates immediately. However, the Federal Maritime Commission can exempt state-controlled carriers from these requirements, which is the case for carriers such as Coscon, APL and China Shipping Container Lines, says Alphaliner on

Tuesday.

United Arab Shipping Company (UASC) was established in 1976 by the six oil states Bahrain, Iraq, Kuwait, Qatar, Saudi Arabia and the United Arab Emirates, UAE. Until this year none of the six states held majority stakes in the company, but Qatar's stake has grown through capital increases and bond issues related to UASC's significant expansion.

UASC's share of the global container capacity has increased signifi-

cantly, especially since 2008. The carrier's management includes several Danish shipping people in key positions, along with former EAC man Jørn Hinge as CEO.

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## National / Shipping Germany

Täglicher Hafenbericht vom 29.07.2014

# Deutschland weltweit die Nummer drei

VDR legt aufschlussreiches Datenmaterial und Jahresbericht zur Schifffahrt unter Schwarz-Rot-Gold vor

Trotz der weiterhin bestehende weltweiten Schifffahrtskrise, die auch die deutschen Reedereien belastet, belegt die Bundesrepublik Deutschland im weltweiten Ranking der führenden Schifffahrtsnationen einen Spitzenplatz.

Das geht aus der Broschüre „Daten der deutschen Seeschifffahrt“ hervor, die der Verband Deutscher Reeder (VDR) zeitgleich mit dem gestern präsentierten Jahresbericht 2013 vorgelegt hat. Auf dem ersten Platz (Stichtag: 31. Dezember 2013) findet sich in dieser Rangfolge Japan mit 3906 Seeschiffen und 151,1 Millionen BRZ. Das Tragvermögen der japanischen Handelsflotte belief sich auf 228,9 Millionen Tonnen. Den zweiten Rang behaupten die Griechen mit zusammen 3365 Schiffen, die mit 143,6 Millionen BRZ vermessen sind und eine Tragfähigkeit von 250,3 Millionen Tonnen auf sich vereinen.

Deutschland kam im Berichtsjahr auf 3580 Frachter mit zusammen 91,4 Millionen BRZ beziehungsweise 123,6 Millionen tdw. Bemerkenswert ist der vierte Platz in der Rang-

folge der Welthandelsflotten: Dieser wird - noch - von China belegt, das ja eine sehr expansive maritime Gesamtstrategie verfolgt. Das Reich der Mitte kam für das Berichtsjahr auf 3242 Schiffe mit zusammen 87,6 Millionen BRZ und 144,5 Millionen tdw. Was die unterschiedlichen Segmente angeht, sind Deutschlands Reeder weiterhin weltweit die Nummer eins in der Containerschifffahrt. Zur Flotte gehörten zum genannten Stichtag 1603 Container-Carrier, die es auf eine Gesamttransportkapazität von 5,04 Millionen TEU brachten. Das Tragvermögen der Containerflotte addierte sich auf 64,2 Millionen Tonnen. Anders formuliert: Fast zwei Drittel der deutschen Handelsflotte entfallen auf Containerfrachter. Mehr noch: Weltweit steuern deutsche Reeder derzeit gut ein Drittel der globalen TEU-Transportkapazität bei. Platz zwei unter den führenden Containerschiff-Nationen ist Dänemark, maßgeblich geprägt durch die weltweit größte Reederei, die Maersk-Gruppe. Für das Berichtsjahr weist Dänemarks Containerflotte einen Gesamtbestand

von 264 Einheiten mit zusammen 1,4 Millionen TEU auf. Das Tragvermögen belauft sich auf 17,8 Millionen Tonnen. Auf dem dritten Rang der weltweit führenden Container-Reedereien findet sich Japan mit zusammen 312 Frachtern und 1,3 Millionen TEU sowie einer Tragfähigkeit von 15,6 Millionen Tonnen. VDR-Präsident Michael Behrendt nutzte die Vorlage des Jahresberichtes dazu, auf die Umbruchsituation der deutschen Reederwirtschaft „angesichts der unerwartet langen Krise“ hinzuweisen. Besonders kleine und mittelständische Reedereien arbeiteten daher „vermehrt zusammen, um frisches Kapital zu gewinnen und ihre Effizienz zu steigern. Dabei geht es für etliche ums Überleben“, stellt Behrendt fest. Ziel aller müsse es sein, „unseren Platz unter den größten Schifffahrtsnationen der Welt zu behaupten. Es gilt, die mehr als 480 000 Arbeitsplätze zu sichern, die von der mittelständisch geprägten Schifffahrt in Deutschland abhängen“.

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## VDR: Fundamental change

Michael Behrendt says unexpectedly long crisis changing face of industry. German shipping is undergoing "fundamental change," says Michael Behrendt, president of the German Shipowners Association (VDR), in its latest annual report.

The former chairman of Hapag-Lloyd writes that changes have been caused by "the unexpectedly long crisis" which impedes a sustainable recovery in freight and cargo rates.

He said the progressive depletion of shipping portfolios along with tougher ship financing requirements imposed by German banks "have been tough challenges for shipowners".

"Smaller and medium-sized shipowners in particular are increasingly forming alliances and achieving success by raising joint financing and boosting their overall efficiency," he said.

Behrendt believes that even more

alliances, cooperative arrangements and mergers will have to be formed to build strength for the future.

"For some, the issue is sheer survival," he said

Behrendt said that "every conceivable effort" should be made to secure Germany's position among the leading shipping nations of the world.

"After all, there are more than 480,000 jobs at stake, all of which depend on Germany's medium-sized shipping industry."

Chief executive Ralf Nagel pointed out that German shipowners pay nearly to EUR 1bn (\$1.34bn) in

income tax and social security payments each year for their direct employees alone.

"This contribution the shipping industry makes to growth and prosperity will be in jeopardy when new uncoordinated environmental regulations are introduced in rapid succession and are applicable to European companies only, placing an unfair burden on our industry," he said.

"We therefore need a fair balance of interests to ensure that quality shipping made in Germany and Europe is to continue playing a major role in the world."



## Behrendt: German shipping fundamentally changing

The continuing crisis in international shipping constitutes a massive challenge for German shipowners, who are especially hit by German banks' reticence to provide new loans for ships, says Michael Behrendt, Chairman of the German Shipowners, in a new annual report.

The German shipping industry faces fundamental changes in 2014. Many shipowners are hit by the continuing crisis in shipping, especially by the banks' increased lending requirements for ship financing. These requirements are forcing shipowners to look for financing sources for existing ships, and not capital for investments in new ships, says the Chairman of the German Shipowners' Association, VDR,

Michael Behrendt, in the association's annual report, published Monday.

"A global oversupply of cargo capacity continues to impede a sustainable recovery in freight and charter rates. What is more, the progressive depletion of shipping portfolios along with tougher ship financing requirements imposed by German banks have been tough challenges for shipowners. Nevertheless we

must make every conceivable effort to secure our position among the leading shipping nations of the world. After all, there are more than 480,000 jobs at stake, all of which depend on Germany's shipping industry," says Michael Behrendt.

In ship management, the general medium-sized companies that operate out of Germany are in a solid position to compete in the global service market. The companies

have many years of experience, are extremely well connected internationally, and they act with prudence and foresight, says Michael Behrendt, who points to the need for more mergers, alliances and collaborative arrangements between the shipping companies:

"However, as the crisis continues to drag on unexpectedly, many shipowners now find themselves facing difficult structural challenges, having to identify new sources of follow-up financing for their ships in service, and capital for urgent investments in advanced technology. To this end they are acquiring internal expertise in capital markets and financing. Furthermore, smaller and medium-

sized owners in particular are increasingly forming alliances and are achieving success by raising joint financing and boosting their overall efficiency."

Michael Behrendt sees the hints of an improving global economy in 2014 and 2015 as particularly good news for German shipping, which still controls one of the world's largest commercial fleets in container and dry bulk, and to a lesser degree in tanker.

VDR CEO Ralf Nagel stresses in the annual report that German shipowners contribute EUR one billion every year to the German society

through income taxes and social security schemes, but this significant contribution could be at stake when new and uncoordinated environmental requirements are introduced one after the other, requirements that apply only to European companies: "We therefore need a fair balance of interests to ensure that quality shipping made in Europe - which currently accounts for 40 percent of the global merchant fleet - is to continue playing a major role in the world."

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## International / Shipping International

Lloyd's List vom 29.07.2014

# Seaspan sees small gain in revenue amid weak charter market

Capital markets move adds to war chest

SEASPAN Corp, owner of 74 container vessels, reported a slight increase in revenue Monday, due in large part to the delivery of newbuilds and a drop in unscheduled off-hire days.

The company posted \$173.9m in revenue for the three months ending June 30, a 3.6% increase from the \$167.8m in revenues during the same period last year. Still, those gains were partially offset by lower charter rates for three vessels on short-term charters, the company stated.

Normalized net earnings for the company jumped to \$32.1m during the second quarter, up from \$25.5m during last year's second quarter.

"During the second quarter, we generated stable cash flow for

shareholders, while continuing to execute on our newbuilding program, which is aimed at increasing the size of our fleet and future earnings power.," said Gerry Wang, chief executive of Seaspan.

Operationally, the company touted the delivery of two vessels during the quarter.

Seaspan also successfully tapped the capital markets in April, issuing a 6.375%, \$345m senior unsecured, followed by a new equity raise of up to \$75m in May. On the lending side, Seaspan secured a short-term unsecured revolving credit facility for up to \$100m to help fund vessels under construction and a \$83m five-year term loan to help fund its 14,000 TEU newbuild containership on the last day of the quarter.

"With significant financial strength and flexibility, we remain well positioned to continue to capitalize on compelling growth opportunities, complementing the value we create for shareholders through our dividend policy," Wang added in the company's statement.

As a result, Seaspan's long-term debt increased \$300m to \$3.3bn between the first quarter and second quarter of this year.

The company's cash and cash equivalents sits at \$285.9m, about the same level from last quarter.

Seaspan will host its conference call on Tuesday.

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## US containerized imports indicate early peak season

U.S. containerized imports in June showed substantial year-over-year growth, as labor negotiations on the West Coast seem to have induced an early ocean container shipping peak season.

U.S. containerized imports were up 6.9 percent year-over-year in June. That gain followed a 10 percent year-over-year jump in April, and a 2.3 percent rise in May. A total of 1,602,062 TEUs came into the U.S. from source countries in June, according to PIERS, the data division of JOC Group, 1.1 percent lower than May's totals.

Shippers importing goods into the U.S. bent the normal seasonal curve by shipping earlier this year in an effort to avoid congestion and slowdowns at U.S. west coast ports, where the International Longshore and Warehouse Union and port owners are involved in labor contract negotiations.

"ILWU talks skewed second-quarter

import volumes, but imports are still en route to reach a new peak volume this year of 19 million TEUs," JOC economist Mario Moreno said. "For the second quarter of the year, imports expanded 6.6 percent year over year, 1.3 percent over forecast. I estimate about 45,000 inbound TEUs were pushed forward from the third to the second quarter."

Peak season is usually seen around July and August, but the early shipments could have pushed the peak season months earlier, boosting May and June numbers. Year-to-date, containerized imports to the U.S. are up 5 percent.

Regionally, imports from northeast Asia were up 7 percent, and U.S. imports from northern Europe rose by 12 percent year over year. Trade with several countries grew by double-digit percentages year-over-year. Containerized import volumes from the Netherlands jumped 19 percent compared with June 2013, and containerized imports from

Spain rose 20 percent year-over-year.

U.S. imports from the east coast of South America were down 6 percent, and imports from the Caribbean fell 9 percent. Brazil and Ecuador both saw 6 percent drops in their containerized exports to the U.S. in June.

Several commodities saw huge year-over-year increases, including plastic products, which jumped 48 percent compared with June 2013, and fabrics including raw cotton, which rose 38 percent compared with the same period.

Containerized imports of menswear dropped the most, falling 24 percent year-over-year, while imports of sheets and towels dropped 16 percent and miscellaneous apparel imports dropped 13 percent.

## Prospect of Nicaragua canal stumps industry observers

When the Nicaraguan government earlier this month approved plans by a Hong Kong-based company to build a canal linking the Pacific with the Caribbean and thus the Atlantic, observers in the maritime industry were largely left scratching their heads.

The HK Nicaragua Canal Development Investment Co.'s proposal to build a 173-mile canal raise numerous concerns about environmental issues, the danger of earthquakes or volcanic eruptions and how it could be financed, but most of all about its cost, which the company estimates at \$40 billion.

While \$40 billion might suffice to build a sea-level canal, it won't go very far if HKND plans to build locks, which it states on its website it will do, but it doesn't go into details on where they would be and their size.

The proposed channel, which would measure anywhere from 754 feet to 1,706 feet wide and 90 feet deep, starts from the mouth of the Brito River on the Pacific side, passes through Lake Nicaragua, and ends in the Punto Gorda River in the Caribbean. The fresh-water lake is 107 feet above sea level, which means the group would have to build locks on both sides of the lake.

By contrast, Gatun Lake, up to which the Panama Canal Authority is building a fourth set of locks at a cost of \$5.25 billion, is 85 feet above sea level.

"If the Nicaragua canal will ever be built, the final cost will be much higher than \$40 billion," said Chaim Sacham, a former senior executive with Zim Integrated Shipping Services, who is now an independent consultant. "This is not to say that it will not be built, but if it will be built, it will be a waste of a lot of money, and it will not bring any positive ROI for many years, if at all."

Nicaraguan President Daniel Ortega awarded the contract for the canal on a no-bid basis to HKND Group. "To the best of my knowledge, HKND Group and its chairman, Wang Jing, have nothing to do with engineering and/or construction," Sacahan said. "However, under the exclusive contract, Wang can skip building the canal (and making any payments to Nicaragua) and instead simply operate lucrative tax-free side projects. This leads me to say that if this canal will ever be built, it will not be by HKND Group but by others, and it will take much longer than the five years that they are saying it will take."

HKND's plan is to build a canal that will be able to accommodate the largest ships that are likely to be built up through the year 2030. Although the proposal does not specify the precise size of the ships its locks would handle, the HKND website says it will "be able to accommodate super-post-Panamax ships up to about 23,000 20-foot-equivalent units, and will offer the shortest shipping route between Asia and many U.S. East Coast ports."

"Who needs it?" Sacham said. "When the new locks are finished, the Panama Canal will be able to handle ships of up to 12,500 TEUs, but East Coast ports won't be ready to handle ships that big for five years."

The largest container ships afloat today, Maersk Line's Triple E class of 18,000 TEUs, are 1,312 feet long, 194 feet wide and have a draft of 48 feet. The Triple E ships are too large to fit through the fourth set of locks being built by the Panama Canal, which are supposed to be open in January 2016. The new locks will be 1,400 feet long, 180 feet wide and 60 feet deep and will be able to accommodate ships up to 1,200 feet long.

A Nicaraguan canal would provide a

larger and slightly shorter alternative to the Panama Canal for Asian goods being transported to the U.S. East Coast, but channel size alone might not be enough. "The key is project viability," said Walter Kemmsies," chief economist for Moffatt & Nichol, a port design and engineering consultancy. "It's not clear that they have checked all the boxes to get the project off the ground."

Kemmsies said the HKND Group would have to meet strict environmental requirements by international lending institutions before it could raise the capital to fund the project. "What about invasive species?" he said. "If you have sea snakes from the Pacific coming through the canal into the Caribbean, would this affect Caribbean tourism?"

Another environmental concern is that seawater from the approach channels would mix with the fresh water of the lake, which is Central America's largest lake and a major source of drinking water and irrigation. It also hosts a number of rare and endangered species in small ecosystems within its waters, which could be endangered by the required dredging for the canal, not to mention the potential for contamination by sediment from the dredging operation.

The route from North Asia through a Nicaraguan canal would be slightly shorter than through the Panama Canal, but since the proposed canal would be 174 miles long and require locks, it will doubtless take longer to navigate it than the much-shorter transit through the Panama Canal, even with the time it takes to go through its locks. "After all, you couldn't go through the canal at full speed," Kemmsies said.

"It would have to offer something competitive with Panama in terms of lower cost and shorter transit time," said John Wheeler, vice president of sales for the South Carolina Ports

Authority. "We are hearing that shippers will pay for a faster transit." He said there would be an opportunity for a canal that accommodates larger post-Panamax ships. "In five to seven years, you will have container ships of 13,000 to 14,000 TEUs coming up the East Coast." Ships of that size would be too large to transit the Panama Canal's new set of locks and also too large to be unloaded by the ship-to-shore cranes at most East Coast ports, which need to be taller to reach across their stacks of containers.

The Panama Canal Authority has repeatedly declared its intent to remain competitive with other ocean routes to the U.S. East Coast. Canal Administrator Jorge Quijano said the authority keeps a close watch on the cost of competing routes for Asian cargo shipments to the U.S. Midwest and East Coast such as mini-landbridge from West Coast ports or the Suez Canal in planning toll increases.

Quijano told JOC.com in an interview in June that the authority is already studying the possibility of building even larger locks than the set now under construction, and has chosen a place for them. "We will only build a bigger fourth set of locks if the demand is there," Quijano said.

The HKND Group plans to start work on the canal in December and complete it in five years at an estimated

cost of \$40 billion. HKND said the Nicaragua canal would employ 50,000 workers during the construction phase and create another 100,000 permanent jobs when complete. But former Panama Canal Administrator Alberto Aleman Zubieta said the project could cost as much as \$100 billion.

The problem is that Nicaragua lacks the ports, the infrastructure and the skilled labor force to support such a project. HKND said it plans six sub-projects to support the canal, including two new ports, a free trade zone, tourist resorts, an international airport and several roads.

"It would be a pharaonic project saddled on a tiny nation with few resources and flagging development," said Rosemary Werrett, a Latin American specialist with the Observatory Group, a macro economic and political advisory firm. The project would likely touch off massive inflation in Nicaragua, which does not have the resources or workforce to support it. "The Chinese have a practice of bringing in Chinese workers for a project this size," she said.

Wang, the HKND Group's founder, is a 41-year-old telecom executive who is also its chairman, CEO and owner. He is little known outside of China. According to his bio on HKND's website, he is "board chairman of more than 20 enterprises which operate businesses in 35

countries." It also says "Jing has founded or invested in businesses across major infrastructure, mining, aviation and telecommunications sectors." Jing has said his group is a private enterprise that will build the canal without Chinese government financing.

The group would presumably have to raise capital to fund the project on international capital markets. Even if it does get some support from China, the country's \$600 billion sovereign wealth fund, the China Investment Corp., only allocates \$100 billion for projects outside the country, with most of that focused on Africa and South America, Werrett said.

"It's a hell of a thing to try to compete with the Panama Canal," said Mark Sisson, senior port planner/analyst at AECOM, a port design and engineering firm. "It would have huge fixed costs in terms of debt payments that it would have to pass through to shipping lines." If the Chinese government does support the project, it may do so for geopolitical reasons rather than commercial. "Maybe the Chinese government wants to buy its own canal. They have all the money in the world, so maybe they don't care about a return on investment," Sisson said.



## Suez Canal widening to begin this week

The Suez Canal's major deepening project is just over the horizon as crews will start widening and dredging a 34-kilometer strip in order to improve wait times for vessels using the canal.

AsiaCruiseNews.com reported today that the long-awaited widening project could take years to complete, but dredging crews will begin within the next week. The canal's website says the dredging will take the canal from 48 feet to 52 feet.

"This project will allow giant container ships heading south to pass through these channels and reduce ... total transit time," the website says.

Currently, on a typical day three convoys transit the canal, usually consisting of two southbound and one northbound trip. It takes between 11 and 16 hours to complete the passage at a speed of eight knots.

The Suez Canal has seen record traffic this year, partially because of delays and construction at the Panama Canal. For the first time, on all-water services from Asia to the East Coast, a greater percentage of the shipments will move through the Suez Canal than via the Panama Canal, according to Alphaliner.

In May, the Suez Canal Authority reported 526 ships passed through the canal, up 6.9 percent from April's

totals. The number of container ships passing through the Suez in May was the highest since May 2013, when 533 container vessels transited the canal.

The ships are also larger than the vessels that make their way through the Panama Canal. Parts of the Suez are 66 feet deep and can accommodate vessels as large as Maersk's 18,270-TEU Triple E ships. In 2013, Drewry reported the average size of ships passing through the Suez Canal was 7,756 TEUs; the current maximum for ships using the Panama Canal is about 5,000 TEUs.

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## Rise in Mediterranean shipments boosts utilization, spot rates

A rise in traffic from Asia to Mediterranean ports has led to a tight capacity issue and a substantial rise in spot prices for container cargo.

Drewry reported a total of 422,000 20-foot containers were moved from Asia to the Mediterranean in March. April TEUs rose slightly to 427,000, but May's totals rose nearly 7 percent month over month to 458,000 TEUs. June totals have not been finalized, but Drewry anticipates a small slowdown in cargo numbers.

May's jump, however, brought the lane's cargo volume to one million TEUs, 7 percent higher than the same period of 2013. Growth to the Western Mediterranean was 8.6 percent, compared to the Eastern Mediterranean's 5.7 percent, Drewry said

in the latest edition of its Container Insight Weekly.

"The pace of change was well ahead of normal seasonal cargo growth, as well as economic growth, suggesting that even better times lie ahead," Drewry said.

The phenomenon, however, may also be a flash in the pan. Drewry said there's a chance that after five years of difficult economic conditions, belts have loosened just enough to replace the essentials. Consumers could be replacing cars or appliances, in which case the cargo numbers to the Mediterranean won't hold.

Capacity also has tightened on the

lane. The CKYHE alliance reduced its capacity by 16 percent by streamlining sailings, which resulted in a 3 percent capacity reduction from April to May for the lane as a whole, Drewry said. However, the average vessel size increased from 8,100 TEUs in April to 8,530 TEUs in May and June.

In theory, that means utilization rates could have been over 100 percent, Drewry said, but carriers seem to have battled the problem with unscheduled sailings. The capacity issue, however, is shown in the pricing for cargo running from Asia to the Mediterranean.

Overall, spot rates on the Shanghai Containerized Freight Index from Asia to the Mediterranean have

been up substantially, rising from a low in mid-March. Despite some erosion in recent weeks, the spot rate stood at \$1,459 per 20-foot container as of July 25, up 63 percent from the low for the year of \$893 on March 21.

Shippers may have been cautious to add capacity with the P3 Network set to begin sailing in the early third quarter. Now, with the rejection of the alliance by Chinese regulators and a new try by Maersk Line and Mediterranean Shipping Co. in the form of the proposed 2M vessel-sha-

ring agreement, which won't begin offering service in the Mediterranean until after the new year, interesting times could lie ahead, Drewry said.

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Journal of Commerce vom 29.07.2014

Autor: Corianne Egan

## Low-sulfur bunker fuel prices sink to six-month low

Spot prices for low-sulfur bunker fuel sank for the sixth straight week last week, a total drop of just over 7 percent.

The price of low-sulfur fuel per metric ton in Rotterdam, the Netherlands, a global indicator of bunker prices, has dropped \$46.21 in six weeks. Last week alone, the spot rate price per metric ton dropped 1 percent from the previous week, falling to \$600.70 per ton. Since January 1, low-sulfur spot prices have dropped 2.4 percent.

percent lower compared with the same week last year. Low-sulfur prices have not slipped below \$600 per metric ton since the end of January.

One metric ton is equivalent to about 6.4 barrels or 300 gallons.

High-sulfur spot prices were up marginally, showing gains of 0.2 percent for a weekly average of \$574.50 per metric ton. Despite this increase, the price of high-sulfur fuel is down 5.2 percent year-over-year and 2.5 percent since Jan. 1.

the pricing of crude oil. Unrest in the Middle East tends to spur price hikes, and constant conflict in Iraq has already spawned talk of rising crude oil prices. BRENT, an index of spot market fuel prices, has dipped in recent weeks.

"Brent prices have been dropping steadily since the middle of January and taking Rotterdam bunkers along for the ride," Mitchell J. Karp, vice president of LQM Petroleum Services, told JOC.com.

This week's average price was 2.2

Bunker fuel prices typically follow

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# Former Panama Registry chief tells why he jumped ship to Liberia flag

Alfonso Castllero former chief of the Panama Registry until 25 July has joined Liberia, the world second largest registry, as its vice president. In an exclusive interview with Seatrade Global, he explains why he jumped ship.

Although Liberia remains in second position at 30 June, 2014 with 132m gt, behind Panama flag with 220.09m gt, according to Lloyd's Register, Liberia ship registry has showed constant growth in recent years. Scott Bergeron, ceo of the Liberian International Ship & Corporate Registry (LISCR), the US-based manager of the Liberian Registry, said in a statement: "We welcome the appointment of Alfonso Castillero. It is not every day that the opportunity arises to appoint somebody of his experience and quality."

Castillero who climbed to Panama's register highest position told Seatrade Global he believes that he "did

[his] best for Panama but that it was time to join the private sector."

"I continue to believe that Panama needs a complete holistic re-engineering and new approach. It is not something new. I have been saying that for years and even making public comments about it in international media," he said. In his farewell letter to Panama's users, Castillero said he trusted "that the new [Panama] authorities will have the same vision of continuous improvement and to offer a better service at a competitive price for the benefit of [our] users and the country."

From now on, the new Liberia Register vice president will be travelling for the first six months "getting up on Liberia's structure and staff since the Register has offices fully set up worldwide and also visiting clients, developing new services, registration of ships and offshore corporations. What I want is to offer a whole

package including not only flagging but incorporation of companies for shipowners," he explained.

"Liberia is an extremely serious registry, full of excellent professionals committed to innovation and service. We will keep growing because our product is excellent, easy to buy and service is outstanding with an impeccable record of safety. In addition, its management has a clear long-term vision," Castillero commented.

For Bergeron, Castillero's, "Long involvement at the highest level of international ship registry affairs will be invaluable and will strengthen the cadre of seasoned industry professionals who help to make Liberia the flag of choice for continually increasing numbers of the world's leading ship owners and operators."

# Häfen / Ports

DVZ - Der Tag vom 29.07.2014

## Französische Häfen fallen zurück

Der größte französische Containerhafen Le Havre hat im ersten Halbjahr 1,23 Mio. Teu umgeschlagen. Das entspricht dem Niveau des Vorjahreszeitraums. Der Hafenverbund Haropa, dem auch Rouen und Paris angehören, erreichte 1,28 Mio. Teu

(minus 1 Prozent). Der Gesamtumschlag verringerte sich in Le Havre um 4 Prozent (32,5 Mio. t), bei Haropa um 3 Prozent (43,9 Mio. t). Im Hafen Marseille-Fos ist der Gesamtumschlag im ersten Halbjahr um 6 Prozent gesunken (38,23

Mio. t). Der Containerumschlag verbesserte sich um 7 Prozent auf 583 287 Teu.

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DVZ Deutsche Verkehrs-Zeitung vom 29.07.2014



**Autor:** Von Günther Hörbst, Jan-Peter Naumann und Sebastian Reimann

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## "Das war alles vorhersehbar"

Ex-DSVK-Vorsitzender Rüdiger Grigoleit schickte im Frühjahr sogar Brief an Wirtschaftsbehörde

Bei den Kunden des Hamburger Hafens wird derzeit viel mit dem Kopf geschüttelt. Zum einen machen sich die Verbesserungen nur sehr zögerlich bemerkbar, zum anderen stören sich Container trucker, Spediteure und Verloader an dem "kaphonisch anmutenden Krisenmanagement", wie es ein Logistikdienstleister gegenüber der DVZ ausdrückte. Dass mehr hätte passieren müssen, bestätigt auch Rüdiger Grigoleit, bis vor kurzem noch Vorsitzender des Deutschen Seeverladerkomitees im BDI (DSVK). "Das ist alles vorhersehbar gewesen", sagte der Manager des Pharma- und Chemiekonzerns Merck der DVZ. Er habe schon vor einiger Zeit in einem Schreiben an die Wirtschaftsbehörde der Hansestadt darauf hingewiesen, dass es zu Problemen kommen werde. Der Grund ist einfach: Die Containermenge pro Schiff, die abgefahren werden muss, ist mit der Größe der Schiffe ebenfalls gewachsen. Sie kann bis zu 4000Teu auf

einen Schlag betragen.

"Der Senat tut nichts"

Zum Vorwurf Grigoleits wollte sich die Hamburger Wirtschaftsbehörde nicht äußern. "Hamburg schafft die Rahmenbedingungen für die Unternehmen. Die Rolle der Behörde für Wirtschaft, Verkehr und Innovation ist es darüber hinaus, zu vermitteln, damit alle Beteiligten zu Lösungen kommen, die unserem gesamten Standort dienen", sagte eine Sprecherin der DVZ. In diesem Zusammenhang habe es Gespräche mit den unterschiedlichen Beteiligten gegeben. Die Vorgänge und die Berichterstattung darüber schaden dem gesamten Standort Hamburg. "Es sollte also allen daran gelegen sein, das in der Zukunft zu verhindern", sagte die Sprecherin. "Dazu gehört auch, Partikularinteressen hinten zu stellen und gemeinsam zum Wohl des Hafens zu handeln." Für Grigoleit ist das zu wenig. Er sagt: "Der Senat tut nichts." Schon längst hätte ein "Kümmerer"

eingesetzt werden müssen, der die zahlreichen Engstellen und Reibungspunkte beseitigt. Das sei nicht passiert. Und deshalb gelte: "Die Ware sucht sich ihren Weg und der muss nicht zwangsläufig über Hamburg führen." Nach Grigoleits Informationen prüft eine chinesische Reederei sehr ernsthaft, ihre Mengen aus Hamburg abziehen. Dass die Situation an den Terminals der Hansestadt nicht optimal ist, belegt auch ein Kundenschreiben des Terminalbetreibers Eurogate. Darin wird nach Informationen der DVZ eingeräumt, dass in Hamburg nicht alles reibungslos läuft. Als Ausweichmöglichkeit wird auf Bremerhaven und Wilhelmshaven verwiesen. Weil die Containertrucker so stark durch Baustellen und andere Verkehrseinschränkungen beeinträchtigt werden, hatten sie vor einiger Zeit die Einführung eines Stauzuschlags erwogen (DVZ 4.4.2014, Seite 1). Dieser wurde in letzter Minute jedoch zurückgezogen. Grigoleit

sagt dazu: "Die Verlager hätten Verständnis für diese Surcharge aufgebracht." Dass sie tatenlos zusehen, kann man den Verantwortlichen in Hamburg indes nicht vorwerfen. Wie der Hamburger Hafenkonzern HHLA mitteilte, wird das Personal am Container Terminal Burchardkai wegen der steigenden Spitzenbelastungen im Containerumschlag aufgestockt. Das Unternehmen schaffe dort 50 neue Stellen, hieß es.

Engpässe gibt es auch anderswo. Bereits im vergangenen Jahr hatte der Hafenkonzern nach eigenen Angaben 100 neue Beschäftigte für die Container Terminals Altenwerder und Burchardkai eingestellt. Hintergrund: Die Zahl der am Container Terminal Burchardkai abgefertigten Überseeschiffe mit mehr als 3000

Bewegungen pro Anlauf lag demnach in den ersten sechs Monaten dieses Jahres bei 63 - im Vergleich zu 29 Schiffen im ersten Halbjahr 2008. Und auch in Sachen "Kümmere" gab es Mitte Juli schon Bewegung. Nach einem Krisengipfel hatte Wirtschaftssenator Horch gemeinsam mit Deutsche-Bahn-Chef Rüdiger Grube einen fünf Punkte umfassenden Aktionsplan vorgestellt. (DVZ 15.7.2014, Seite 1). Dabei war auch festgelegt worden, dass die Hamburg Port Authority die beschlossenen Maßnahmen koordinieren soll. Engpässe gibt es im Übrigen auch in zahlreichen anderen Häfen, beispielsweise am ECT in Rotterdam, aber auch in asiatischen Häfen. So hat Schenker darauf hingewiesen, dass es in Ningbo

und Shanghai derzeit nicht ausreichend Equipment für Seefrachtssendungen gibt. An den chinesischen Umschlagplätzen trägt beispielsweise das Abfertigungssystem Chinese Customs Advance Manifest (CCAM) zu der angespannten Situation bei. Denn dadurch kann es bis zu 48 Stunden dauern, bis eingehende Container gelöscht sind. Ein verbindendes Element gibt es allerdings bei allen Häfen: Vor allem die Mengen zwischen Asien und Europa sind derzeit aus Sicht zahlreicher Marktteilnehmer überraschend hoch.

**Vor allem am Terminal Burchardkai gab es zuletzt Abfertigungsprobleme. Foto: Reuters**

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## Wirtschaft / Economy

Täglicher Hafenbericht vom 29.07.2014

# Welthandel wieder lebhafter

Containerumschlag-Index von RWI/ISL sieht Wachstum im Juni

Der Welthandel hat sich offenbar wieder etwas kräftiger ausgeweitet. Das zeigt der aktuelle Containerumschlag-Index des Rheinisch-Westfälischen Instituts für Wirtschaftsforschung (RWI) und des Instituts für Seeverkehrswirtschaft und Logistik (ISL), der im Juni von (unverändert) 121,3 auf 123,2 gestiegen ist. Der Index

erreichte damit den höchsten bisher beobachteten Wert. Die Angaben für Mai blieben gegenüber der vor einem Monat abgegebenen Schnell-

schätzung unverändert. Die Schnell-schätzung für Juni stützt sich auf Angaben von 36 Häfen, die insgesamt rund zwei Drittel des im Index abgebildeten Containerumschlags abdecken. Sie dürfte daher wenig revisionsanfällig sein. In den Index gehen die vom ISL im Rahmen seiner Marktbeobachtung fortlaufend erhobenen Angaben zum Containerumschlag in 75 internationalen Häfen ein, die rund 60 Prozent des weltweiten Containerumschlags tätigen. Da der internationale Handel im

Wesentlichen per Seeschiff abgewickelt wird, lassen die Containerumschläge zuverlässige Rückschlüsse auf den Welthandel zu. Weil viele Häfen bereits zwei Wochen nach Ablauf eines Monats über ihre Aktivitäten berichten, gilt der RWI/ISL-Containerumschlag-Index als ein zuverlässiger Frühindikator der Entwicklung des internationalen Handels mit verarbeiteten Waren und damit auch der weltwirtschaftlichen Aktivität.

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## "Argentinien schneidet sich ins eigene Fleisch"

Die Regierung Kirchner bremst das Potenzial der drittgrößten Volkswirtschaft Lateinamerikas aus.

Serie Südamerika Folge 4: Argentinien

Argentinien steht kurz vor dem Staatsbankrott, wieder einmal. Ende Juli droht eine Milliardenzahlung an internationale Gläubiger. Einfuhrbeschränkungen der Regierung und Devisenkontrollen haben der argentinischen Wirtschaft in den vergangenen Jahren großen Schaden zugefügt. Auch die Logistikbranche ist betroffen. Trotzdem erklärt Gitta Hofmann, Trade Lane Managerin bei Ipsen Logistics in Bremen, der DVZ: "Argentinien ist für uns ein starker Markt." Doch als die Regierung in Buenos Aires vor zweieinhalb Jahren den Import beschränkte, schrumpften bei den Logistikern die Transportmengen. "2013 haben wir rund 50 Prozent weniger Waren nach Argentinien transportiert als noch ein Jahr zuvor", sagt sie. Ende 2011 hatte die argentinische Regierung beschlossen, Importe nur noch zuzulassen, wenn Güter im gleichen Wert exportiert werden. Das führte dazu, dass Automobilhersteller wie Porsche oder BMW zu den größten Wein- und Reixexporteuren des Landes aufgestiegen sind. "Argentinien schneidet sich ins eigene Fleisch", kommentiert Hofmann. Wenn die Importe zurückgingen, könne Argentinien nicht so viel exportieren, um die dringend benötigten Devisen zu erwirtschaften. "Wir müssen bei jedem Dokument genau prüfen, ob die Produkte, die nach Argentinien eingeführt werden sollen, auch richtig aufgeführt sind", sagt Thomas Pillwein, Bereichsleiter LCL bei A. Hartrodt. Das Geschäft sei damit komplizierter geworden, er müsse sich nun sehr

viel mehr mit den Partnern in Buenos Aires abstimmen. A. Hartrodt arbeitet seit 20 Jahren mit dem argentinischen Spediteur Caleu Cargo S.A. zusammen und hat eine eigene Niederlassung für das Exportgeschäft. "Wir exportieren vor allem argentinischen Wein, das läuft sehr gut", berichtet Pillwein. Am Logistics Performance Index der Weltbank ist abzulesen, dass der Logistiksektor in Argentinien schon länger schwächelt. Befand sich das südamerikanische Land 2007 noch auf Platz 45, ist es 2014 auf Rang 60 abgerutscht. Der Transport- und Logistikmarkt trägt nach Angaben der Regierung mit 5 Prozent zum Bruttoinlandsprodukt (Bip) bei. Der Anteil entsprach 2012 etwa 23,7 Mrd. USD. Manuel Molina, Regionalmanager Argentinien beim Lateinamerikaverband in Hamburg, erklärt die schwache Entwicklung mit der schwierigen Wirtschaftslage in Argentinien sowie dem vernachlässigten Straßen- und Schienennetz. "Argentinien wendet nur 1 Prozent seines Bip für Investitionen in die Verkehrsinfrastruktur auf", sagt er. Bei den Staatsausgaben bevorzuge die Regierung den Energiesektor und Sozialprogramme. 90 Prozent des Güterverkehrs im Inland wickeln argentinische und internationale Unternehmer und Spediteure über die Straße ab. Die Bahn spielt Molina zufolge eine untergeordnete Rolle, weil unter anderem Umladestationen zwischen Straße und Schiene fehlten. Für Seefracht ist Buenos Aires der wichtigste Containerumschlagplatz: Das Volumen ist nach Angaben der Wirtschaftskommission für Lateinamerika und die

Karibik der Vereinten Nationen, Cepal, 2013 im Vergleich zum Vorjahr um 7,7 Prozent von 1,7 Mio. Teu auf 1,8 Mio. Teu gestiegen. "Der Nachteil ist nur, dass der Hafen mitten in der Stadt liegt", meint Sabine Aurich, Abteilungsleiterin Seefracht Export Lateinamerika bei Röhlig Deutschland in Hamburg. Deshalb würden manche Kunden auf den Hafen Zarate, einen Stückgut- und RoRo-Hafen nordwestlich von Buenos Aires am Rio de la Plata ausweichen. Dort stieg der Umschlag von containerisiertem Getreide und Soja im Jahresvergleich 2012/2013 von 132800 Teu auf 180400 Teu.

Umweg über Hafen Montevideo "In Buenos Aires ist das Umladen für den Weitertransport über den Rio de la Plata nach Bolivien oder Paraguay umständlich und zeitaufwendig", berichtet Aurich. Normalerweise dauere es 24 bis 48 Stunden. Doch oft gebe es Streiks, so dass die Container warten müssten. Manche Reeder steuerten mittlerweile Montevideo im benachbarten Uruguay an. Die argentinische Regierung hat daraufhin jedoch im vergangenen November verboten, argentinische Waren über Uruguay zu exportieren. Dabei hat Argentinien großes Potenzial. Die drittgrößte Volkswirtschaft Lateinamerikas produziert vor allem Soja und Sojaprodukte, Fleisch, Erdöl und Erdölprodukte sowie Getreide. Wichtigster Handelspartner ist Brasilien. Bei den deutschen Einfuhren rangierte Argentinien 2013 auf Platz 51 (1,7 Mrd. EUR), bei den deutschen Ausfuhren auf Rang 45 (2,8 Mrd. EUR). Das Wirtschaftswachstum schwankt; nach Angaben der Welt-

bank lag es 2013 bei 3 Prozent. Großen Schaden fügte der argentinischen Wirtschaft der schwache Peso und die Kapitalflucht zu. "Die Inflation lag im März offiziell bei 1,4 Prozent", sagt Molina vom LAV. Die staatliche Statistikbehörde Indec beschönige die Zahlen. Privaten Berechnungen zufolge habe die Inflationsrate bei 3,3 Prozent gelegen. Die Wirtschaftspolitik von Regierungschefin Cristina Fernández de Kirchner trägt nicht gerade dazu bei, Argentiniens Chan-

cen zu nutzen - mit geplanten Verstaatlichungen, Importbeschränkungen und einem dirigistischen Wirtschaftskurs. Für die Schuldentilgung dringend benötigte Devisen fließen nicht. Investoren bleiben weg, Exporte und Dollarreserven schrumpfen. Einen ersten Schritt in die richtige Richtung vernahm Molina jedoch von der Deutschen Argentinischen Industrie- und Handelskammer in Buenos Aires: Nachdem Wirtschaftsminister Axel Kicillof die Devisenkontrollen gelockert hat,

soll es künftig auch einfacher werden, die begehrten Importlizenzen zu bekommen. (kk)

Kennzahlen Argentinien

**Das argentinische Fleischgeschäft könnte besser laufen. 15 Prozent Exportsteuer belasten die Rindfleischausfuhren. Foto: Visum Serie Südamerika 8. Juli 2014: Kolumbien 15. Juli 2014: Brasilien 22. Juli 2014: Chile 29. Juli 2014: Argentinien [www.dvz.de/lav](http://www.dvz.de/lav) Südamerika**