



MacAndrews

Short Sea Shipping
Yesterday, today and tomorrow.

Shortsea 14 European Conference
Gare Maritime de Alcântara
Lisboa
12th & 13th May 2014



V.22 APR 2014



CMA CGM group

MacAndrews Facts

Established in 1770

220 employees : 18 offices throughout Europe

HQ in London

10 Services / 11 chartered vessels

45' & 40' High Cube Pallet Wide Containers

20' & 40' Containers (including specials)

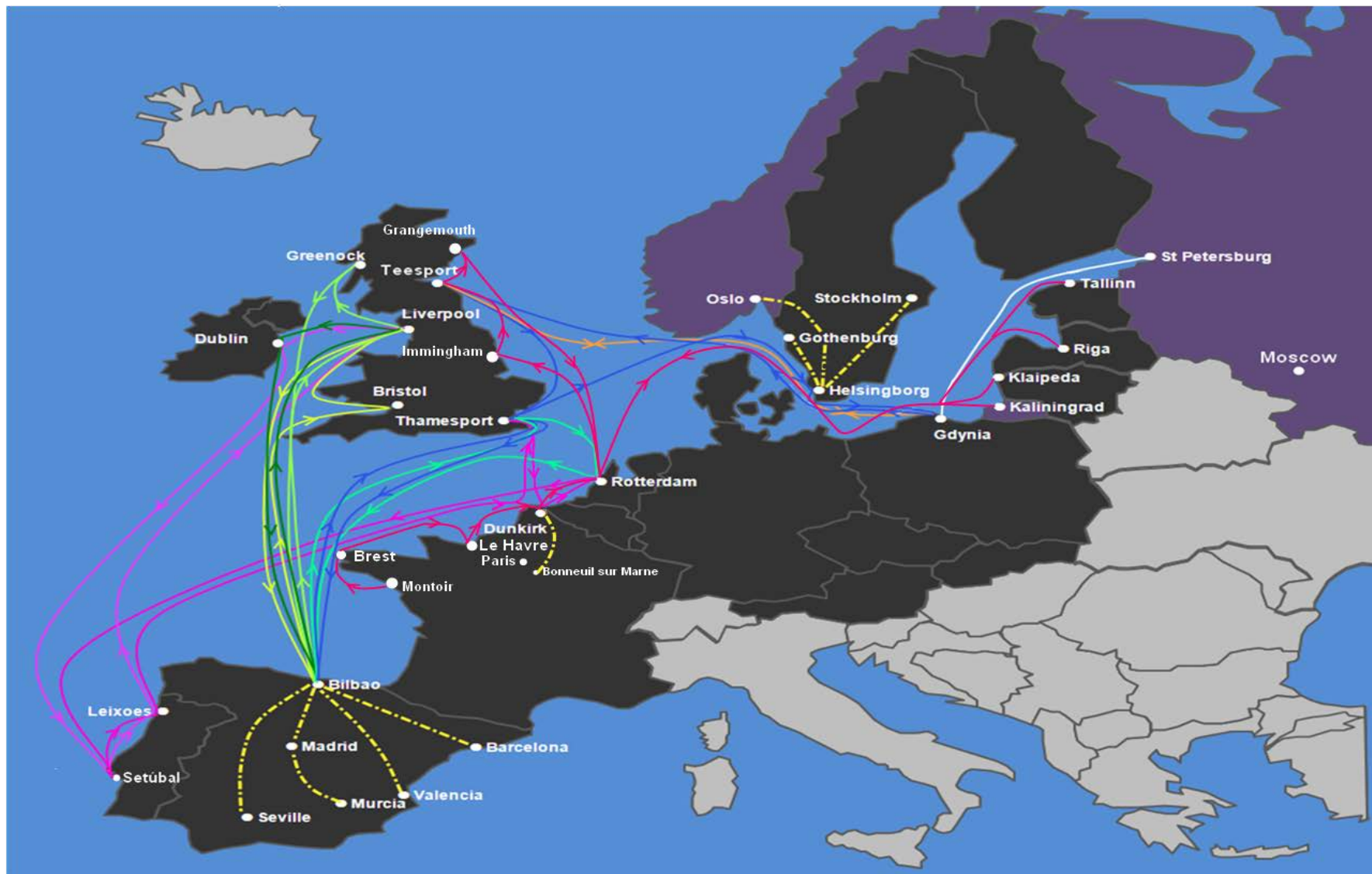
40' HC & 45' HC PW Reefers

Subsidiary of the CMA CGM Group

Percentage growth between 2008/2013 was 77%



Where and how we **currently** operate



Spain – NWUK & SCUK Services (4 LOOPS)



NWUK Service 1	
Bilbao	Monday
Liverpool	Thursday
Greenock	Friday
Bilbao	Monday
NWUK Service 2	
Bilbao	Thursday
Bristol	Sunday
Liverpool	Monday
Bilbao	Thursday
NWUK Service 3	
Bilbao	Friday
Dublin	Monday
Liverpool	Tuesday
Bilbao	Friday

Vessels operating this service:

NWUK 1 – 630 teus capacity
 NWUK 2 – 530 teus capacity
 NWUK 3 – 530 teus capacity
 SCUK 1 – 430 teus capacity



SCUK Service 4	
Bilbao	Monday
Thamesport	Thursday
Rotterdam	Friday

Spanish Rail Network



- MacAndrews currently operates 40 Block Trains from Barcelona, Madrid, Valencia, Seville and Zaragoza & Burgos thru Bilbao for DRY GOODS
- Murcia to Bilbao Direct Reefer Trains operate twice weekly consisting of 26 reefers per block train
- Moved 90,342 TEUS in 2013 vs. 83,674 TEUS in 2012 via this rail network (+8%)
- Multi-user Train accessibility
- Port of Bilbao well-situated for SW France
- 5 Offices throughout Spain
- 2 Offices in Portugal

Portuguese Service



Portugal Service 1	
Setubal	Monday
Leixoes	Tuesday
Thamesport	Thursday
Dunkirk	Friday
Rotterdam DDW	Saturday
Rotterdam RST	Sunday
Portugal Service 2	
Setubal	Friday
Leixoes	Saturday
Liverpool	Tuesday
Dublin	Wednesday

Vessels operating this service:

PG Vessel 1– 443 teus capacity

PG Vessel 2- 443 teus capacity

PG Vessel 3– 443 teus capacity

Polish Service



Polish Service	
Gdynia	Fri
Teesport	Mon

Vessels operating this service:

Polish Vessel 1– 390 teus capacity

Scan – Baltic Service



Scan Baltic Service	
Bilbao	Thursday
Thamesport	Sunday
Helsingborg	Tuesday
Gdynia	Thursday
Teesport	Sunday
Thamesport	Monday
Bilbao	Thursday

Vessels operating this service:

Scan-Baltic Vessel 1 – 806 teus

Scan-Baltic Vessel 2 – 750 teus

Russia/ Baltics Service



ex UK, Iberia, Russia via Gdynia

Teesport	6 days transit to St Petersburg
Thamesport	10 days transit to St Petersburg
Bilbao	14 days transit time to St Petersburg
Madrid / Seville / Valencia / Barcelona	16 days transit time to St Petersburg
Setubal , Leixoes	16 days transit time to St Petersburg

ex UK, Ireland, France, Benelux, Germany to Russia via Rotterdam

Dublin, Immingham, Teesports, Grangemouth	15 days transit time to St Petersburg
Benelux, Germany	7 days transit time to St Petersburg
Dunkirk, Montoir, Brest, Le Havre	7 days transit time to St Petersburg

ex UK, Ireland, Benelux, Germany, Iberia to Baltic States via Rotterdam

Benelux, Germany	8 days transit time to Baltic States**
Dublin, Immingham, Teesports, Grangemouth	15 days transit time to Baltic States**
Spain [Bilbao]	15 days transit time to Baltic States**
Spain [Inland]	17 days transit time to Baltic States**
Portugal	16 days transit time to Baltic States**

**** Baltic Region** - Klaipeda (Lithuania), Riga (Latvia), Tallinn (Estonia), Kaliningrad (Russia)

■ Gdynia – St Petersburg (New Service started in February)



Gdynia – St Petersburg Service	
Gdynia [BCT] – St Petersburg [FCT]	Sails –Tuesday, arrives Wednesday
St Petersburg [FCT] – Gdynia [BCT]	Sails –Monday, arrives Wednesday

Warehousing in Bilbao



- Port Centric Warehousing Facility
- Additional storage solutions
- Cross Docking
- Milk Rounds
- Consolidations

10,000sqm² warehouse situated on a plot of land of some 32,500sqm² which also houses an area for a container depot and storage. 500sqm² refrigerated area.



Warehousing in Rotterdam (Smirnoffweg, Waalhaven)



The facility is in the vicinity of the MacAndrews Berth at RST North Terminal, and can offer the following;

- ✓ LCL and FCL activities (LCL for Spain and Portugal)
- ✓ Hazardous cargoes handled
- ✓ All ISO equipment, including flat racks and special projects
- ✓ Bonded warehouse
- ✓ Flexible opening hours (weekend work if required)
- ✓ All yards and warehouses secured with alarm/camera systems
- ✓ AEO Certification



■ SSS's importance in Europe

- In Europe and specially in the European Union, short sea shipping is a policy choice
 - Drivers: **cost**, lead times, frequency, reliability, greener -> Success Criteria which have to be met.
- Short sea shipping is considered important for the European cohesion because it:
 - promotes European trade competitiveness;
 - maintains vital transport links;
 - decreases unit cost of transport to an extent;
 - facilitates Eastern European integration;
 - relieves congestion from land based networks;
 - greener: less energy consumption with lower emissions than road transport

Green Credentials

- One voyage takes about 300 trucks off the roads
- One gallon of fuel will carry a tonne of cargo 60 miles over the road and 500 miles at sea
- In 2013, MacAndrews saved customers approx. 195,000 tonnes of CO²

AIR EMISSION RANGES GRAMS/TONNE-KM		
	TRUCK	MARINE
CO	0.25 – 2.40	0.018 – 0.20
CO ₂	127 – 451	30 – 40
HC	0.30 – 1.57	0.04 – 0.08
NOX	1.85 – 5.65	0.26 – 0.58
SO ₂	0.10 – 0.43	0.02 – 0.05
Source: OECD		

■ SSS's challenges in Europe

- Obstacles hindering this European policy include:
 - local admin requirements (red tape could be an issue)
 - hinterland connectivity: a large number of ports, barge terminals and rail hubs fail to attract investors to expand on these facilities.
 - insufficient integration with other modes as a consequence makes SSS a less attractive option due to longer transit times
 - failure to market and sell SSS versus 100% landside transport resulting in lack of awareness amongst professionals: the general market has an old-fashioned image of short sea shipping services and it is not fully aware of its potential
 - Importance of service frequency which requires critical mass – a challenge

■ SSS's Future in Europe

- Short sea shipping industry has more strategic advantages in Europe than in other regions because of the favourable geography.
- The sea-leg is often the largest part in a logistical chain as far as the travelled distance is concerned, but not in terms of operating costs. Optimizing hinterland connectivity and associated landside costs is therefore critical for the success of SSS
- Yet, the Low Sulphur Regulation in the SECA zone, becoming effective January 1st 2015, will have a serious impact on SSS operators' bottom line. Use of alternative fuel such as LNG needs to be further promoted and supported by the EU.
- Integration between transport modes implies that all modes share the common objective of optimum service in the transport chain; thus making SSS a more **attractive choice rather than an alternative.**

■ How we want to grow our business in the future

We intend to increase the sailing frequency on our key routes from Portugal and Spain.

We firmly believe such enhanced frequency is the basis for the further growth of our door to door transport business in competition with trailers which go daily.



Thank you