

PROJECT CARGO JOURNAL

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PROJECT
CARGO
SUMMIT

11, 12 SEPT.
2019

ONDERZEEBOOT-
LOODS
ROTTERDAM

CONFERENCE
PROGRAMME

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FOREWORD

The project cargo industry is changing constantly. Only five years ago, companies in project cargo owed a great deal of their livelihood to the oil and gas industry. These days their income is greatly dependent on renewable energy sources. But the 'green industry' is still growing and developments in this field tend to be fast-paced. Wind turbine manufacturers, for example, have achieved economies of scale by constructing larger and larger wind turbines. As a result, they yield more power, but they also require bigger foundations and bigger parts. The wind turbine industry is now reaching a point where the capabilities of logistics companies are starting to fall behind. New ideas and solutions are therefore necessary.

In recent years, an increasing number of game changing innovations have been implemented. Tech-savvy companies are changing the way the global economy operates rapidly.

In their wake, the shipping and project cargo industry is facing new challenges and uncertainties:

- What does the rise of new and disruptive technologies mean for the shipping industry in the near future?
- Are spare parts really going to be printed on board ships in 3D?
- Is blockchain the solution to replace costly and labour intensive transportation accounting systems?

The **Project Cargo Summit 2019** is an international business event for project cargo professionals, including a great **exhibition**, free to attend **workshops** and **site visits**. Would you like to know the answers to the questions raised above? Be sure to attend the **Conference** which is held simultaneously. The programme is listed on pages 6 - 7.

I hope to meet you there!



Tobias Pieffers
Journalist for Project Cargo Journal and Nieuwsblad Transport

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LNG

A WIN-WIN DEAL FOR TRUMP, XI AND PROJECT CARRIERS

A swift trade deal between the US and China could propel the US to the top of China's LNG supplier list, according to Bloomberg.

Bloomberg based its article on a recent report from Morgan Stanley. The American bank predicts this would boost the US share of China's gas imports to 21% by 2025, making it China's largest LNG supplier. If the rivals do not reach a pact the US share would grow to only 5%, in comparison to 2% last year. The US is quickly expanding its number of LNG projects and is set to become the world's No. 1 supplier, while China is expected to become the largest importer some time early next decade. "A higher LNG trade from the US to China would potentially be a win-win deal for both," Morgan Stanley's analysts wrote. It can reduce the US trade deficit with China by \$17 billion annually and help China save \$1.8 billion a year in energy costs, the bank estimates.

Project cargo

If the US and China reach a deal, the project cargo market is also expected to benefit from the growing American LNG industry, as several large plants need to be built in order to meet demand. Analysts of WoodMackenzie say LNG could become "a major boon for EPC-contractors and other providers along the supply chain" as final investment decisions are taken on the construction of a large number of new LNG plants, especially in the US. According to WoodMackenzie, almost 90 million

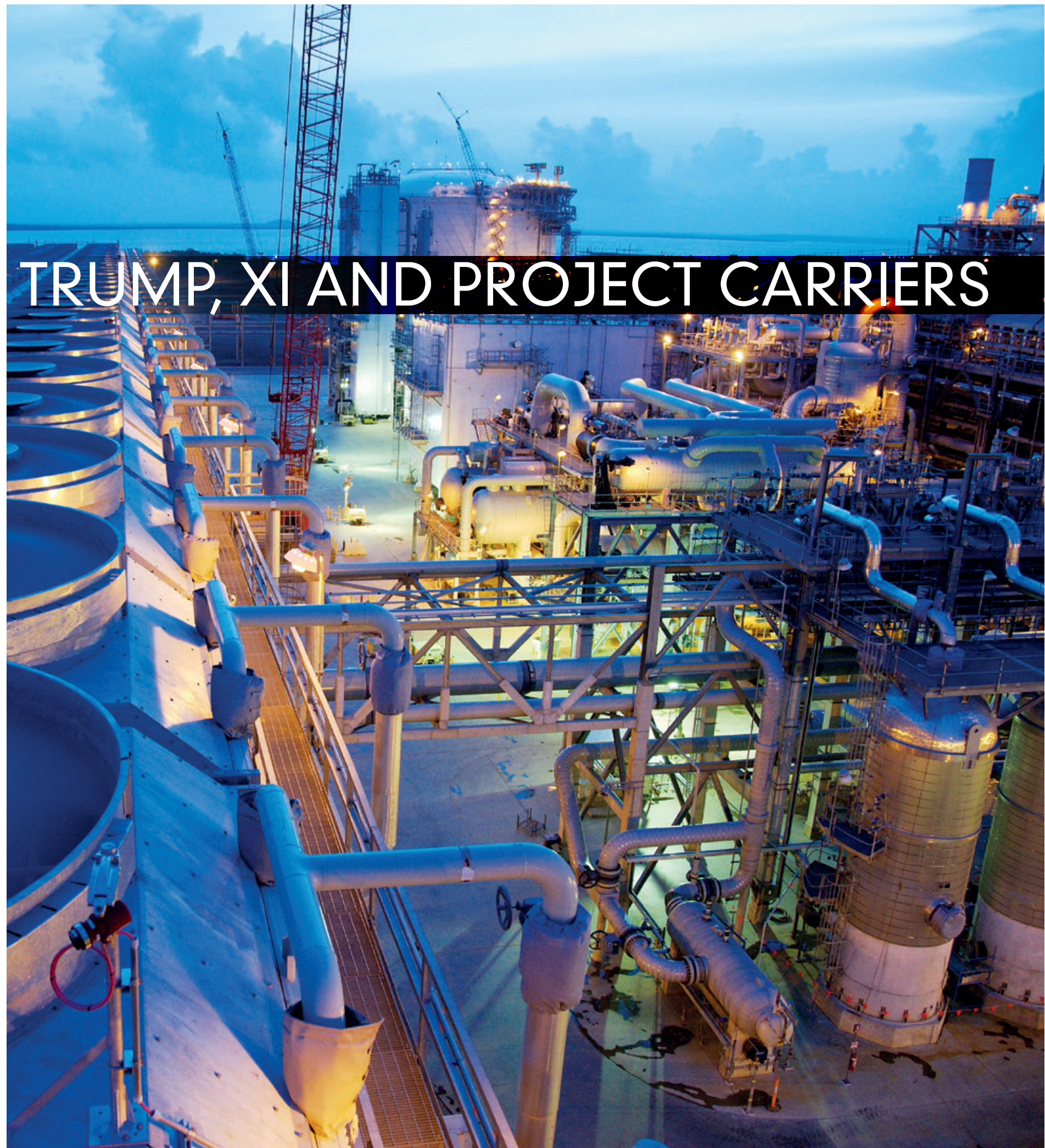
metric tonnes per annum (mmtpa) of liquefied natural gas is expected to start construction over the next two years, with total capital expenditure reaching more than 200 billion dollars between now and 2025.

Currently, however, those projects are jeopardised by the trade war. Without a trade deal, final investment decisions are likely to be delayed, Rystad Energy notes. Based on currently sanctioned projects, the Norwegian analyst firm expects that US LNG export volumes will nearly quadruple over the coming years, reaching 84 million tonnes per annum (mtpa) by 2025.

"Most of these projects need to secure long-term contracts in order to get financing for their development. Rystad Energy expects China to be one of the biggest contributors in sponsoring new LNG projects over the coming years, and there will be a reluctance to signing new deals with US projects as long as this trade war persists," said Sindre Knutsson, Senior Analyst at Rystad Energy

Gas Markets team

Although the trade war just recently intensified after Trump increased tariffs on many Chinese goods, Morgan Stanley still expects the two largest economies to reach a deal this year. ■



CONFERENCE PROGRAMME

**PROJECT
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SUMMIT** | **11, 12 SEPT.
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LOODS
ROTTERDAM

DAY 1

WEDNESDAY 11 SEPTEMBER 2019

SESSION 1. OFFSHORE

- 09:30 - 09:40 **Word of welcome**
- 09:40 - 10:10 **Keynote: Shipping a jumbojet**
Martin De Boer, Corendon Hotels and Tom Rutgrink, Mammoet
- 10:10 - 10:30 **Market review: is the Oil & Gas market finally picking up again?**
Sara Sottilotta, Rystad Energy

10:30 - 11:00 COFFEE BREAK

- 11:00 - 11:20 **Scale increases in wind: how much bigger will we go?**
Hans Henrik Grøn, Siemens Gamesa
- 11:20 - 12:20 **Are you ready for bigger turbines?**
Port of Esbjerg / Kalmar & Tadasa / Wallenius Wilhelmsen / Van der Vlist

12:20 - 13:30 LUNCH

SESSION 2. SHIPPING & ECONOMY

- 13:30 - 13:40 **Shipping cargo means safety first, always**
Annet Koster, Royal Association of Netherlands Shipowners
- 13:40 - 14:05 **Consolidation & disruption in the shipping industry**
Dirk Visser, Dynamar and Frans Waals, Shipping and Ports Consultant
- 14:05 - 14:25 **Lashing and stowage: do current regulations need to be modernised?**
Paul Könst, Rolldock
- 14:25 - 14:40 **How can we modernise lashing regulations?**
Interview with Javier Quintero Saavedra, Chairman International ITP Dry Bulk
Cargoes Working Group

14:40 - 15:10 COFFEE BREAK

- 15:10 - 15:35 **Blockchain & Ship Finance**
Stephan Benninga and Otto Torenbosch, Shipping Company Groningen
- 15:35 - 16:00 **The paper Bill of Lading is ready for retirement**
Leif Arne Strømmen, G2 Ocean
- 16:00 - 16:30 **Shipping panel**
Wallenius / Shipping Company Groningen / Rolldock / G2 Ocean

DAY 2

THURSDAY 12 SEPTEMBER 2019

SESSION 3. PORTS & TERMINALS

- 09:30 - 09:40 **Opening**
Tobias Pieffers, Journalist for Project Cargo Journal
- 09:40 - 10:05 **Lack of European cooperation generates unnecessary costs for Exceptional Transports**
Ton Klijn, ESTA
- 10:05 - 10:20 **Pitch: a possible solution to create efficient road transports**
Big Move (more information follows shortly)

10:20 - 10:50 COFFEE BREAK

- 11:10 - 11:30 **Creating a decommissioning cluster in port**
Marcel Pater, North Sea Port
- 11:50 - 12:20 **Ports panel**
Port of Rotterdam / NSP / Port of Esbjerg

12:20 - 13:30 LUNCH

SESSION 4. INNOVATION & EQUIPMENT

- 13:30 - 13:55 **How big data will shape the crane of the future**
Andreas Ritschel, Area Sales Manager, Liebherr Maritime Benelux
- 13:55 - 14:15 **Challenging the status quo: a new way of shipping wind turbines?**
Jan Lanser, Owner Marine Innovators, MSc. Mechanical Engineering

14:15 - 14:45 COFFEE BREAK

- 14:45 - 15:25 **The rise of synthetic hoisting and lifting equipment**
Wilco van Zonneveld, Cortland / ALE / Greenpin
- 15:25 - 15:45 **How 3D printing will change our business: 3D printed crane hooks in operation**
Eric Romeijn, Huisman Equipment

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A portrait of Danny Levenswaard, a middle-aged Black man with short hair, smiling. He is wearing a dark blue suit jacket over a light blue shirt and a red tie with white polka dots. The background is a textured, grey wall.

INTERVIEW

The Port of Rotterdam saw its conventional breakbulk volumes grow with 3.1% in the first quarter of 2019. The lifting of the American import ban on Russian aluminium had a lot to do with that, says Danny Levenswaard, Port of Rotterdam's breakbulk director, in an interview with PCJ.

DANNY LEVENSWAARD
Director Breakbulk, Port of Rotterdam

"WE HAVE ROOM TO GROW OUR BREAKBULK THROUGHPUT"

What cargo segments drove the first quarter growth?

"The growth was mainly in non-ferrous metals, heavy and large project cargo (HLPC) and forest products. The throughput of steel remained fairly stable. Looking at project cargo specifically, the growth was largely driven by an increase in export of offshore wind related cargo."

How did the port manage to record a growth of 3.1%?

"First of all, let me say we've only just had the first three months

of the year. We recorded a nice growth rate, but we still have nine months ahead of us so we'll have to see what happens throughout the year. Looking at the first quarter in detail we see the largest growth in March when Rotterdam's breakbulk terminals recorded a growth of 13%. Although it might seem this is Brexit related, that's not really the case for our conventional breakbulk volumes. Rotterdam is big in non-ferrous metals and that cargo stream was positively impacted by the lifting

of the American import ban on Russian aluminium. Brexit did have a large impact on our ro-ro volumes, which in the first quarter grew with 10.7%."

How about the growth in project cargo, was that purely driven by the offshore wind markets?

"Yes, that growth is mostly related to the increase of offshore wind-related cargo. We do see some movement in the oil and gas industry as well, as the increase in oil price seems to stimulate



new activity in exploration and production, but it's still nowhere near where it was before the oil price collapsed. In general, the breakbulk market is heavily impacted by the ever-increasing containerization of goods and last year conventional break-bulk volume in Rotterdam remained flat."

What are the port's vision and strategy for the future?

"Containerization is indeed a trend that has been impacting the market for over a decade, but we still see room to grow our breakbulk throughput and we're investing in that as well. It is true that the throughput in 2018 remained flat on paper, but that was caused by

a clearly identifiable cargo package in the year before. In 2016 and 2017 one of the large German steel mills was out of production for maintenance which led to an increase of Brazilian steel slabs imports through the port of Rotterdam. It was a large, temporary and easily identifiable cargo flow

handled by one party. If we exclude that from the figures, we actually saw growth in our cargo base. To facilitate further growth in metals and project cargo we have designed the so-called 'breakbulk carousel', which will create extra terminal space per 2020. Additionally, we are creating a large area on Maas-

vlakte 2 for offshore related activities, primarily for offshore wind installation projects. We need more base cargoes."

What does the 'breakbulk carousel' encompass exactly?

"Basically, we're creating more terminal space for four break-bulk and project cargo terminals which are Metaal Transport (non-ferrous metals and steel), Broekman Project Services (heavy lift, project cargo and offshore), J.C. Meijers (multi-purpose terminal) and RHB (specialist in heavy lift and project cargo). Due to the ever-increasing size in containerships, container terminal operator ECT closed its terminal in the City area to consolidate its activities on the Maasvlakte which is located directly at sea. Port of Rotterdam has since been re-developing the area. We had a lot of interest from parties who wanted to expand their facilities, including from the breakbulk and project cargo terminals. Part of this redevelopment is that terrain has been allocated to Metaal Transport which will concentrate all its activities in the port on this location. At the moment, the company's activities are more scattered throughout the port. Consecutively, the move of Metaal Transport frees up space for Broekman Project Services, J.C. Meyer and RHB to expand their terminals as well. That's why we call it the carousel."

What about the offshore centre on Maasvlakte 2, what can we expect from that?

"Our ambition is to expand our position in the offshore markets and we have a site of 25 acres available for that. The development of this area has been slightly delayed as we were in talks with a consortium of companies to use the infrastructure, but that did not turn out

how we wanted. Partially due to market circumstances, but also because we had different views. We are currently in direct talks with a potential user and we're working full flex to make this project a success."

There seems to be a clear focus on steel, non-ferrous metals and project cargo.

"Rotterdam is very well equipped for the handling of heavy and large project cargo. We have direct port access at sea, deepwater terminals and a unique offer of floating cranes to ease loading and off-loading operations. We have plans to grow this segment even further but in order to do so, we need more base cargoes for ship operators."

ROTTERDAM IS VERY WELL EQUIPPED FOR THE HANDLING OF HEAVY AND LARGE PROJECT CARGO

"Steel and metals are such base cargoes, but at the moment, Rotterdam is not in the top of shippers' minds when it comes to steel or breakbulk – even though we have very capable companies in the port. We see room to grow our steel volume and are working hard to do so. On one hand by facilitating the growth of our terminals, and on the other hand by lobbying and promoting our port as a breakbulk port. We feel the focus on combining cargo flows like that, will give us an edge in the future. Our aim is to make Rotterdam the breakbulk hub of Europe." ■

LUBBERS LOGISTICS EXPANDS INTO ASIA

Lubbers Logistics Group is expanding into Asia with the acquisition of a majority stake in Uniworld Logistics Singapore, effective June 1st, 2019. With the expansion, Lubbers wants to strengthen its position in the global energy markets.



Uniworld Singapore will become part of Lubber's global freight network, but will also remain the representation of the Uniworld Logistics Group with its headquarters in India. As per June 1st, the brand name of the company will be changed into Lubbers Uniworld Global Freight Singapore. The parties did not disclose the value of the agreement. With the acquisition, Lubbers is expanding its services into the Asian market adding new trade lanes to its portfolio. The Dutch logistics provider specializes in the energy sector, offering services like relocation of offshore platforms and pipeline projects next to its normal logistical services.

Network integration

In the coming period, the Singapore office will be completely integrated into Lubbers' network, connecting it to its IT-systems and incorporating its reporting systems and procedures. The new office will be managed by Steven Slim, who will become Lubbers' Regional Director for the APAC-region. Slim brings with him 20 years of experience managing logistics providers with a focus on the oil and gas markets. Ger Engelsman, CEO of Lubbers Logistics Group, said: "With this acquisition, we are taking an important step in our ambition to establish a worldwide network with a focus on the energy sector and to grow our business. We are

very proud of our cooperation with Uniworld and we're certain this will create new possibilities for our customers." Prem Kumar, CEO of Uniworld Logistics Group, added: "We will keep a minority share in the new company and the office will remain a full part of the Uniworld network. We will not only maintain our position in Asia and the Indian subcontinent but also strengthen it. The cooperation with Lubbers brings us experience and expertise in the energy industry, as well as new customers to the APAC-region."

Uniworld Logistics Group has 30 offices in 7 countries and offers logistical solutions to over 500 destinations worldwide. ■

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