



Project Cargo in Support of the Energy Markets

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PORT ESBJERG

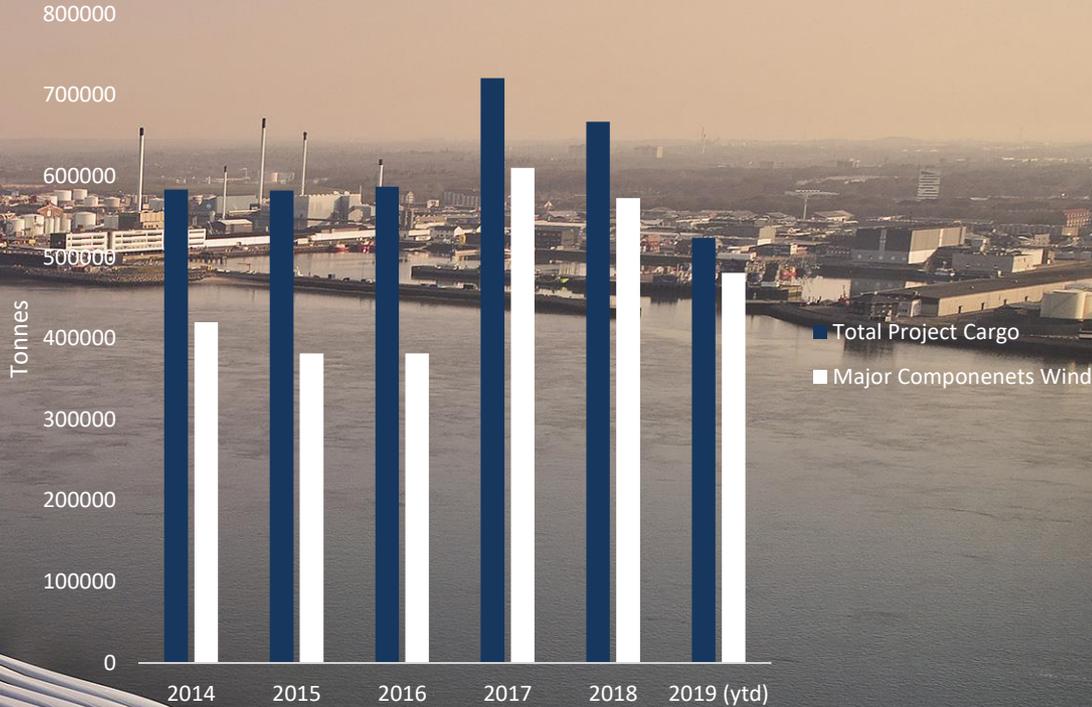

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Introduction

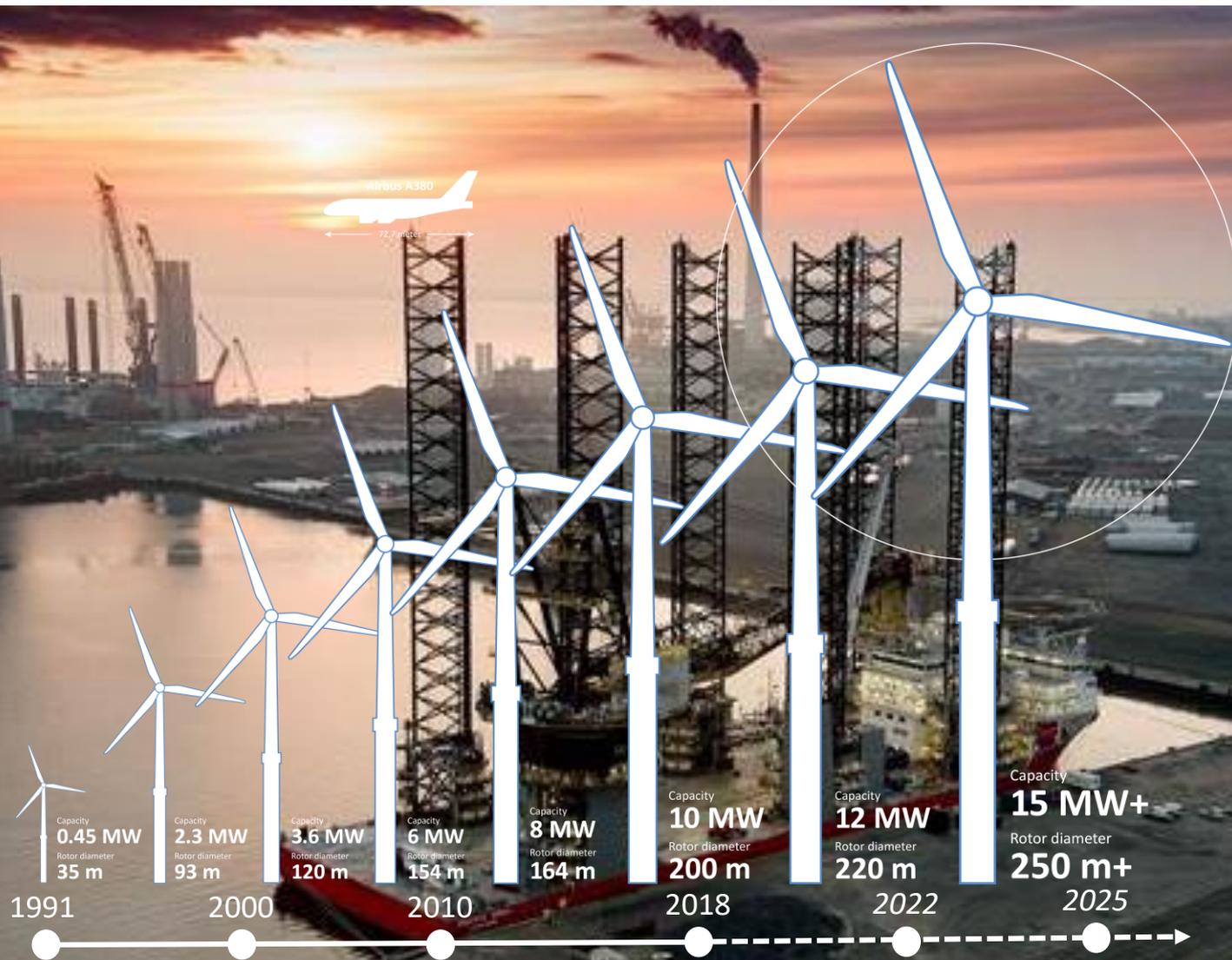
”One of the largest installation and shipping ports for the European Offshore Renewable Industry”



Facts & Data



Potential & Developments



Potential & Developments

The Potential in Danish Offshore Wind is significant considering that Denmark is in Top 5 of installed capacity.

2017
1,3 GW

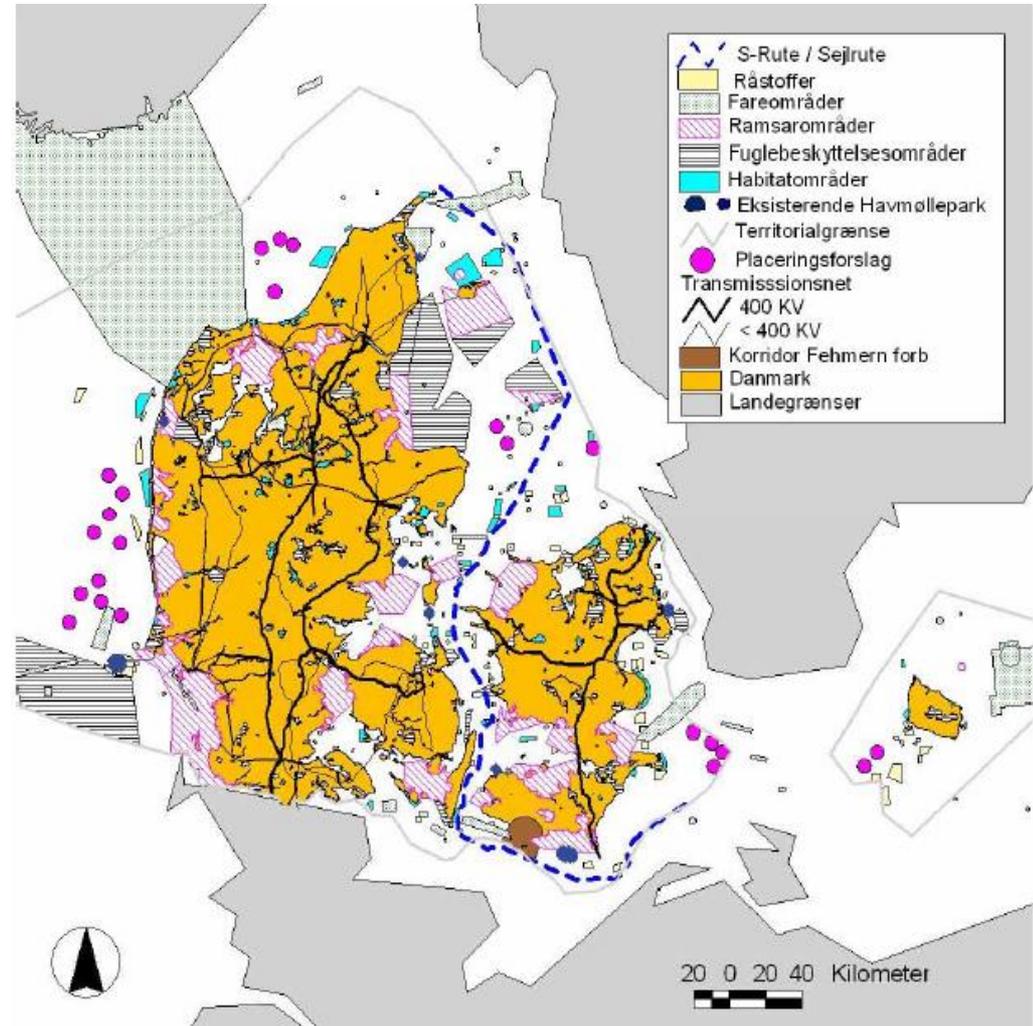
2022
2,8 GW

2030
12,4 GW (est.)

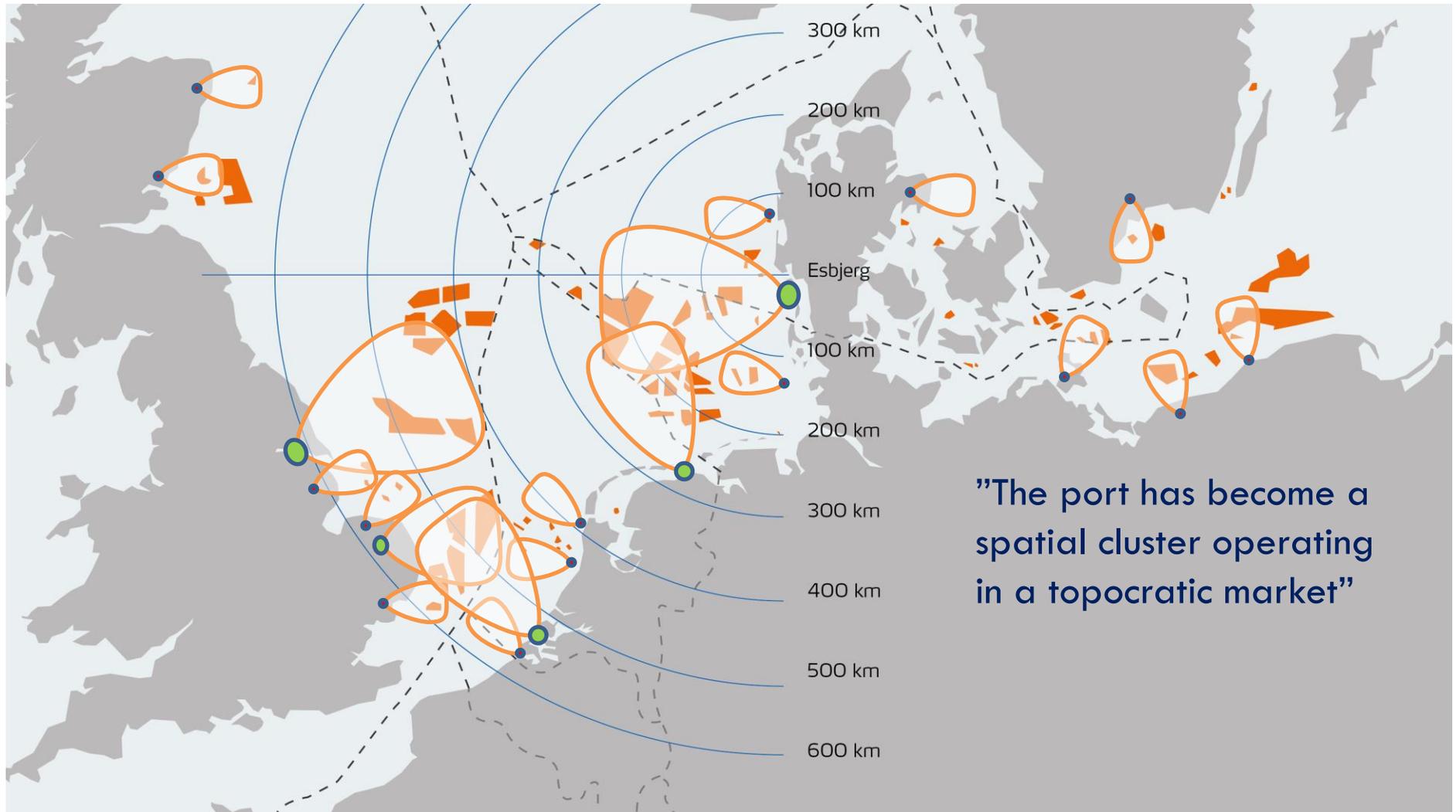
FIGURE 13
Installed capacity – Cumulative share by country

UK	6,835 MW / 1,753 turbines
Germany	5,355 MW / 1,169 turbines
Denmark	1,266 MW / 506 turbines
Netherlands	1,118 MW / 365 turbines
Belgium	877 MW / 232 turbines
Others	328 MW / 124 turbines

TOP 5 REPRESENTS
98%
OF ALL CAPACITY
CONNECTED



Potential & Developments



”The port has become a spatial cluster operating in a topocratic market”

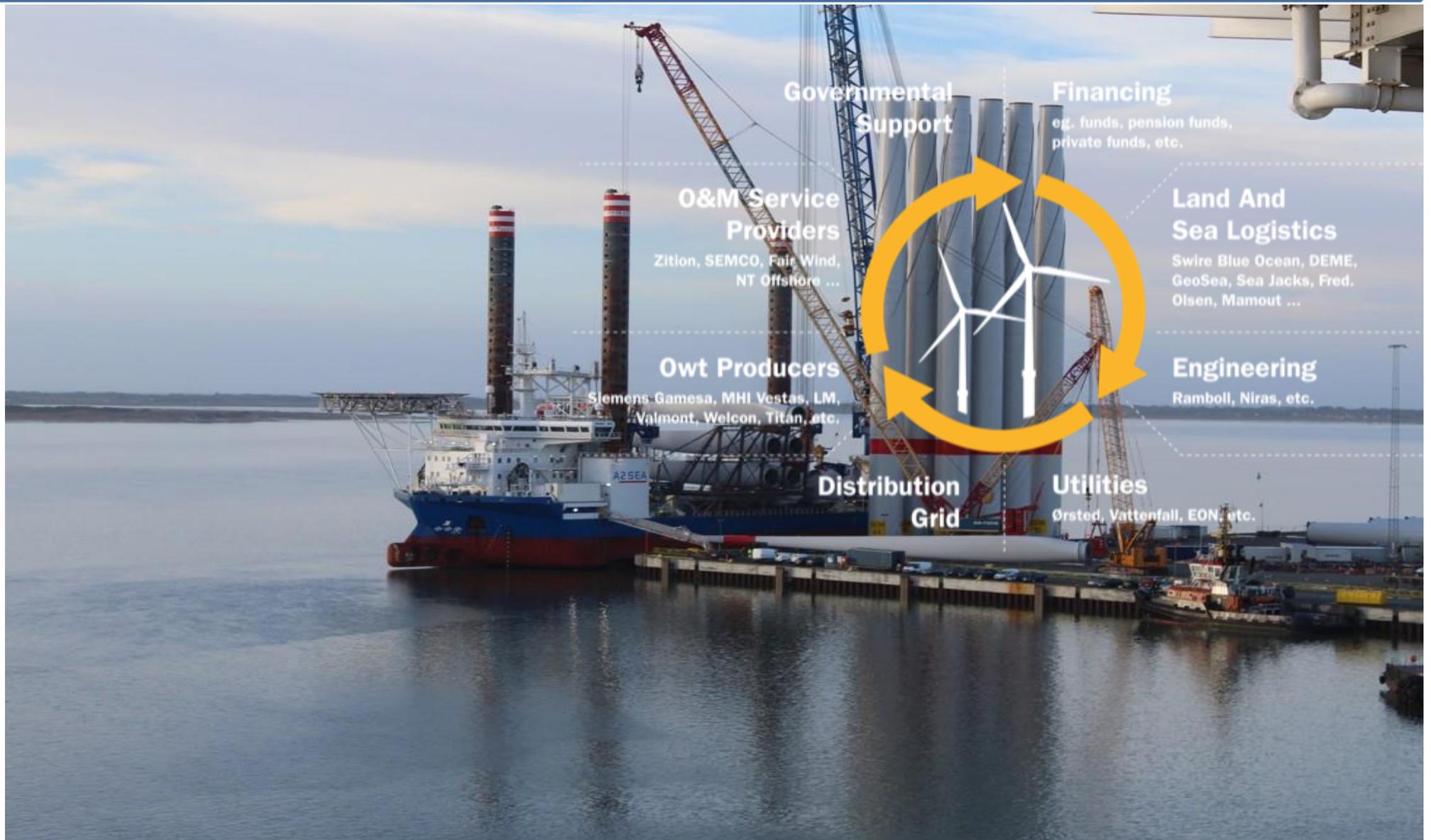
”Bigger Turbines and Larger Areas for Shorter Lease Periods are the Denominators ”



Port Dynamics

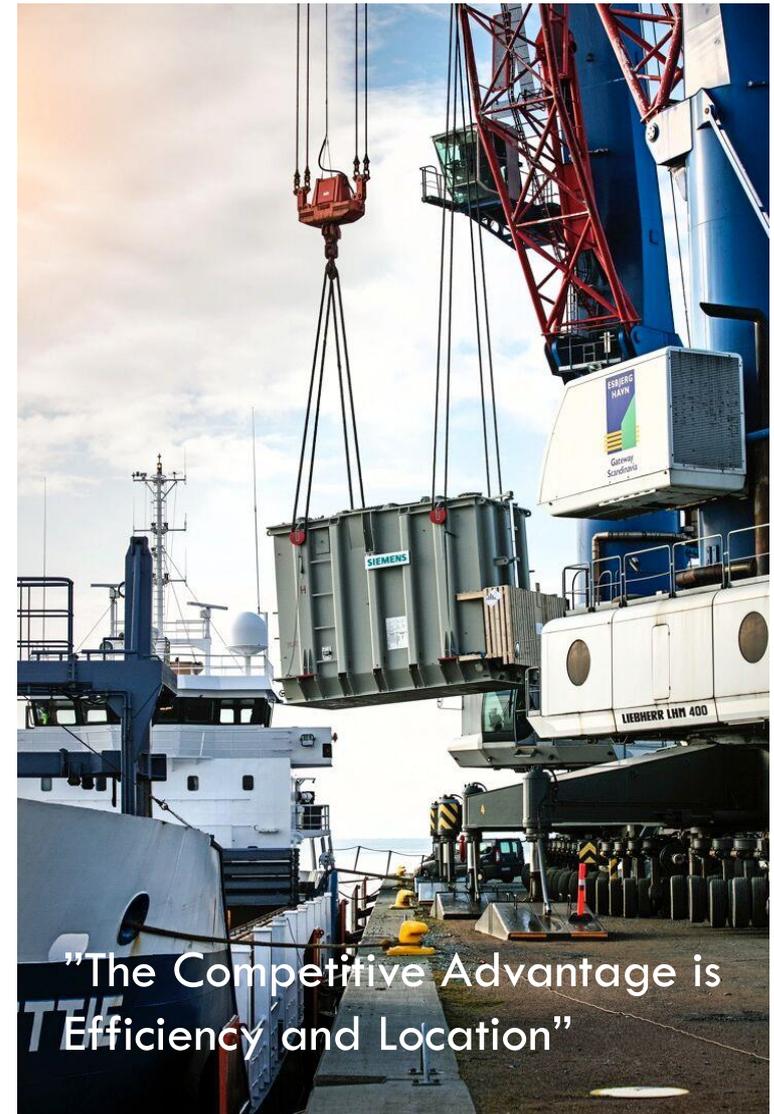


Value Chain Integration



Conclusion

- Major components for offshore wind are increasing dramatically in size, which requires bigger cranes or alternative handling methodologies.
- Turbine Installation Vessels become even bigger, and port infrastructure must consider the most optimal seabed and quay construction.
- Road transport and hinterland connection become less important, while sea transport increases and handling costs in the ports becomes imperative.
- Manufacturing is required in the port to minimize logistics costs and to continue the contribution towards reducing levelized cost of energy.





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