

Maritime & Ports Working Group

Vigo, Spain

14/15 March 2023



BERGÉ
Moved by Logistics

SUARDIAZ
Shipping Lines

TERMICAR
Termicar VIGO, S.L.

Port of Vigo
Port Authority of Vigo

QUECC

Introduction by the Chairman

Oliver Fuhljahn, *Rhenus Cuxport*



Agenda

10:10 Approval of the minutes from the last meeting

10:15 Introduction to Vigo Port Authority

10:35 Coffee break

11:05 Presentation by the sponsors:

- Termicar
- Suardiaz

11:25 Round table discussion

- Ukraine crisis
- Congestion issues
- Docker shortage
- PECs



Agenda

12:05 New regulations (EU ETS, FuelEU Maritime)

12:15 ECG update: Transport of cars in containers

12:25 Update on ECG activities

12:40 Dates and venues for the next meeting/s

12:50 Meeting close

Presentation by the sponsor: Port of Vigo



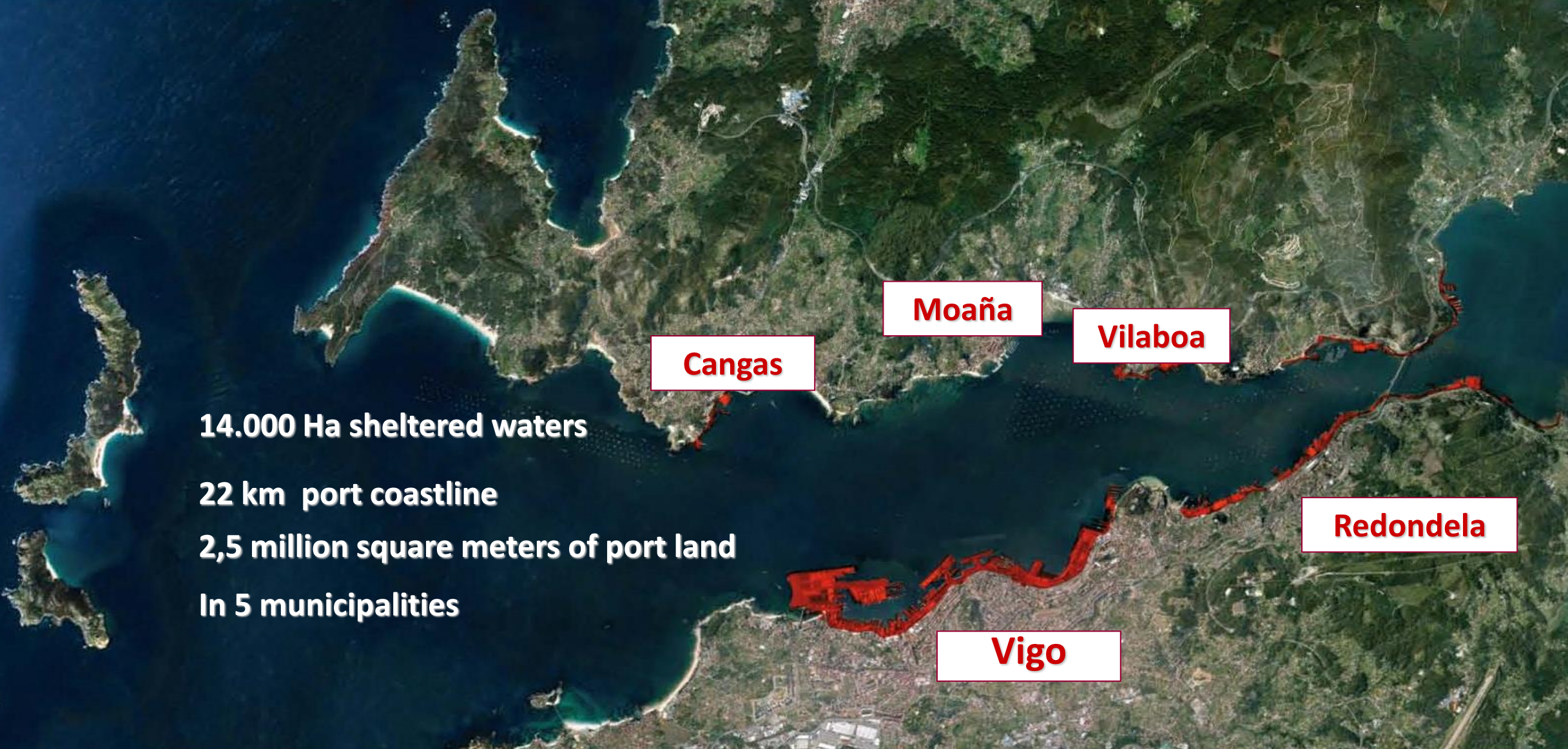
Puerto de VIGO



MARITIME & PORTS WORKING GROUP
15th March 2023



Port service Area: Vigo Bay



14.000 Ha sheltered waters

22 km port coastline

2,5 million square meters of port land

In 5 municipalities

Cangas

Moaña

Vilaboa

Redondela

Vigo

ITS ENVIRONMENT: THE CITY OF VIGO



1st CITY by No. of inhabitants in the **GALICIAN COMMUNITY**

In **SPAIN**: No. 14 in population RANKING

VIGO METROPOLITAN AREA: Population of more than **500,000 inhabitants**.
POSITIVE VEGETATIVE GROWTH.

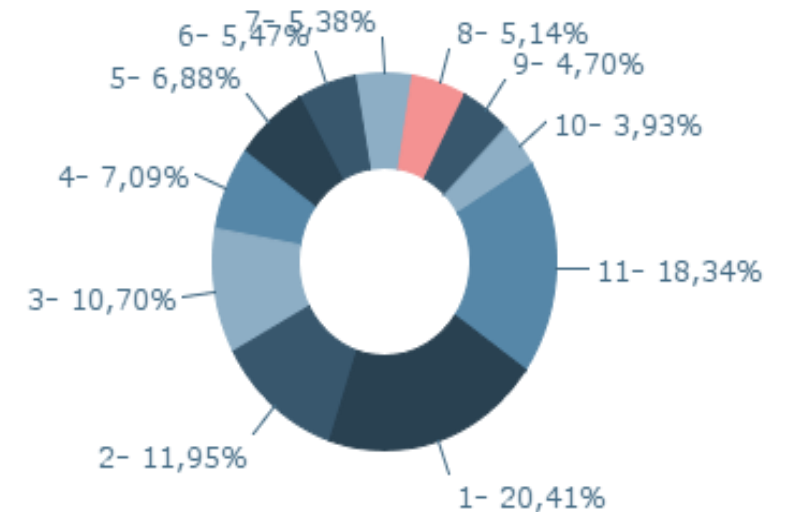
The ECONOMY OF THE CITY:

- 7th exporting province of Spain.
- GDP pc Vigo: € 25,065
- 17% Unemployment rate

1 OF THE 3 BIGGEST FREE TRADE ZONES IN SPAIN

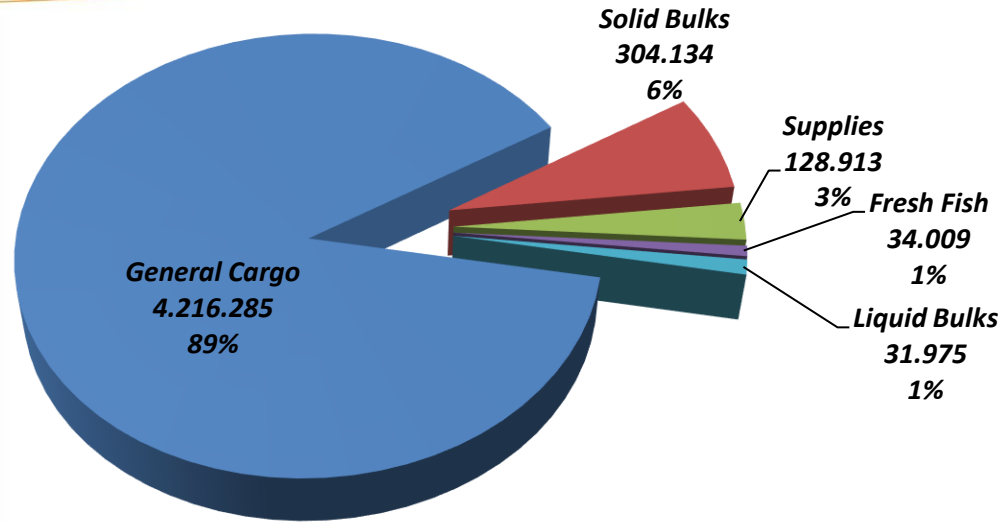


VAB X SISTEMAS PRODUCTIVOS



1- Automotive and equipment 2- Fishing 3- Construction 4- Logistics and transport 5- Professional services 6- Consumer goods 7- Tourism, travel and leisure 8- Health and social assistance 9- Machinery and equipment 10- Information and knowledge 11- Others

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More than 33 % EXPORTS and 24 % IMPORTS of the Northwestern Spain (in value).

VIGO: 7TH EXPORTING CITY OF SPAIN

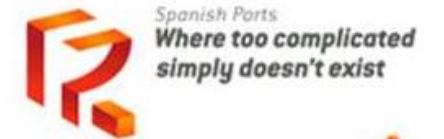
NATIONAL RANKING TRAFFIC - 28 Main Ports -

1st in FRESH FISH / 1st in FROZEN FISH / 3rd in NEW VEHICLES / 1st in GRANITE

5th in GENERAL CARGO Imports / 5th in GENERAL CARGO Exports

9th in CONTAINER TRAFFIC

Fastest growing Spanish port during the pandemic 2020



Areas of activity in the Port Service Area (Vigo Municipality)



BOUZAS RORO TERMINAL: INFRASTRUCTURES



New Port Facility
2ND SILO VEHICLES VERTICAL STORAGE

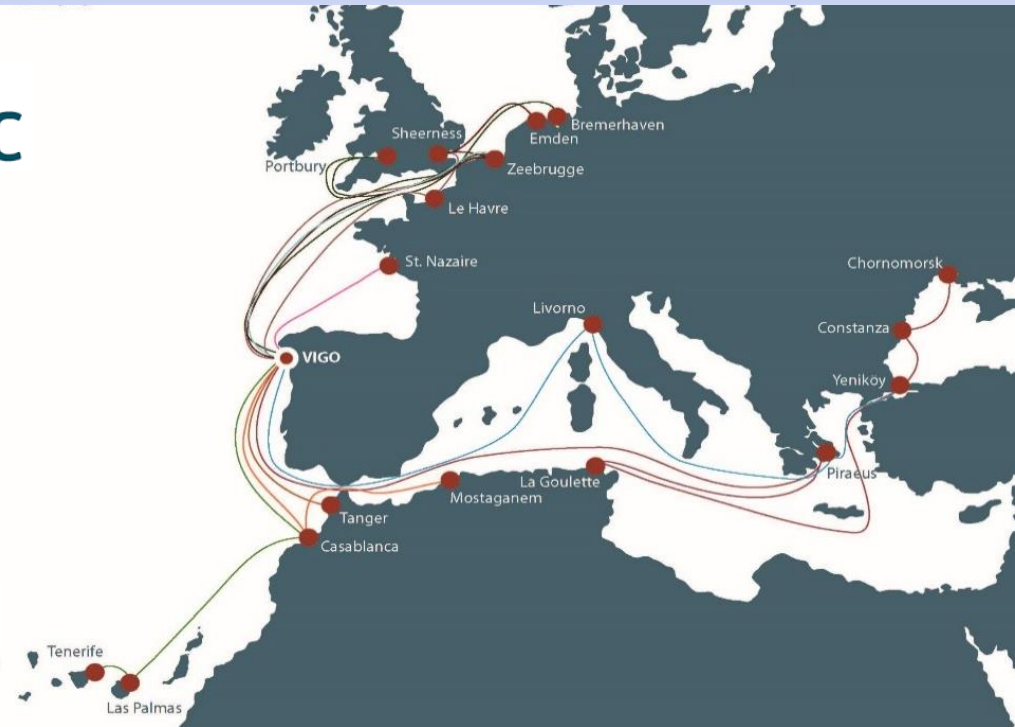
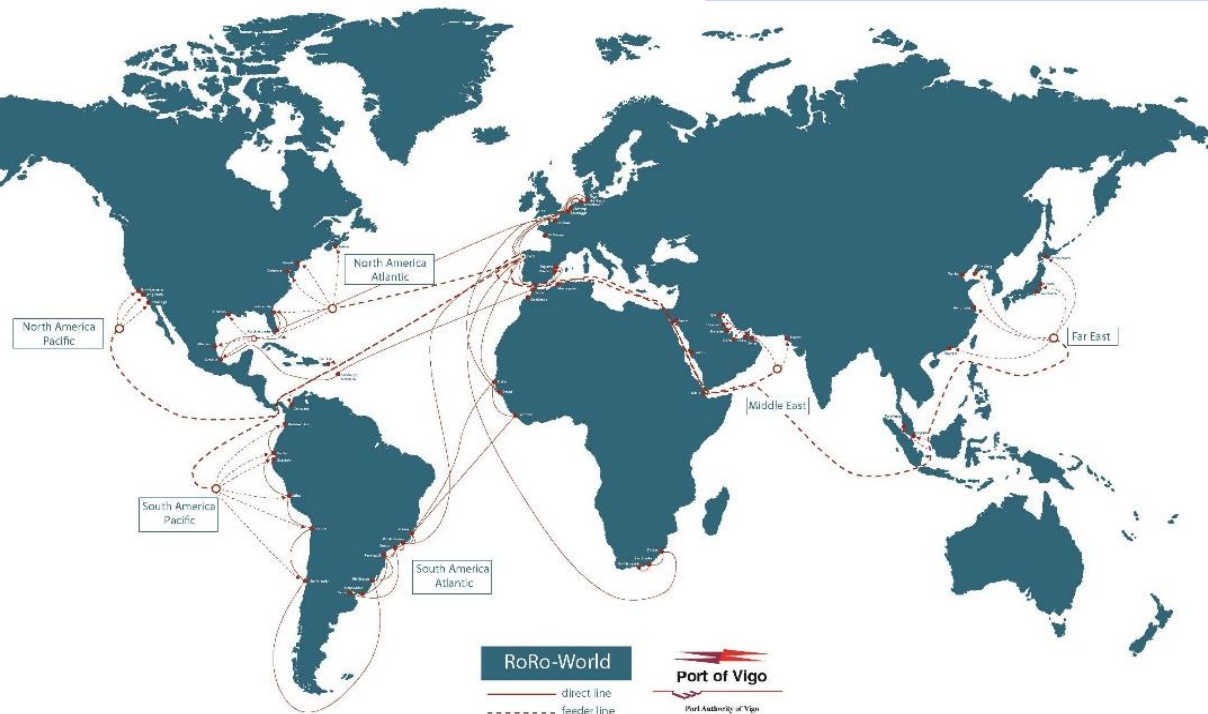


5 FIX RAMPS
1 FLOATING RAMP
AREA: 500.000 m²

RORO RAMPS	1	2	3	4	5
Berthing Line (m)	202	152	159	301	369
Draught (m)	10	8	8	11	14



BOUZAS RORO TERMINAL: MARTIME SERVICES

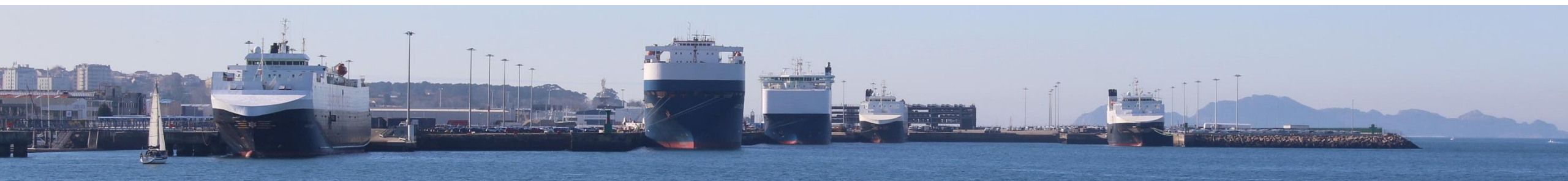
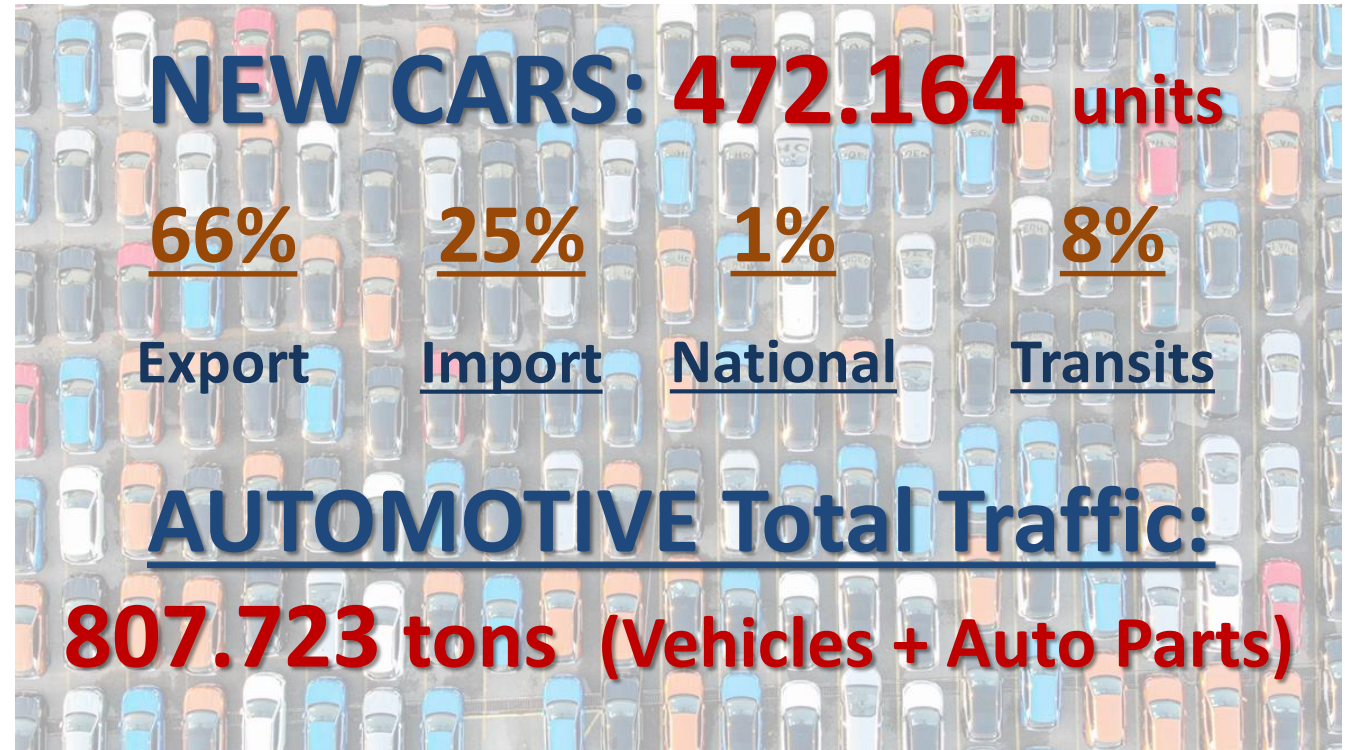


FLOTA SUARDIAZ, S.L.



23 Ro-Ro lines linking Vigo to EUROPE, AMERICA & AFRICA
 (new cars, general cargo by truck and project cargo – heavy lift)

BOUZAS RORO TERMINAL: AUTOMOTIVE SECTOR TRAFFICS 2022





GOBIERNO DE ESPAÑA

MINISTERIO DE TRANSPORTES, MOVILIDAD Y AGENDA URBANA

Puertos del Estado



Port of Vigo

Port Authority of Vigo

BOUZAS RORO TERMINAL: OTHER TRAFFICS 2022

- Cars
- Auto Parts
- Slate
- Perishables
- Reefer
- Timber
- Metals...



VIGO RORO TRAFFICS EVOLUTION: 2017 - 2022

	2.017	2.018	2.019	2.020	2.021	2.022
NEW CARS (units)	484.961	451.111	482.640	512.788	503.295	474.791
TRAILERS (units)	17.852	17.766	17.576	12.516	12.259	9.788
TOTAL RORO TRAFFIC (tons)	1.079.461	1.067.556	1.126.119	1.017.641	1.071.527	985.138



AUTOMOTIVE SECTOR IN VIGO

STELLANTIS in Vigo and ancillary industry.

More than **20,000 jobs**. In **1973** began to use the PORT OF VIGO in its LOGISTICAL supply and distribution chain.



- NEW VEHICLES TOTAL PORT TRAFFIC 2022 RO-RO & LO-LO: **475,000 VEHICLES**.
- TOTAL INDUSTRIAL VALUE [imp.+exp. Vehicles & Auto Parts]= **8,150.97 M€**

STELLANTIS



78% traffic

HIGH PROFITABILITY FACTORY (productivity & logistics ratios)

- The most important PSA factory in Europe.
- It exports 85% of its production.



7,1% traffic



4,6% traffic



4% traffic

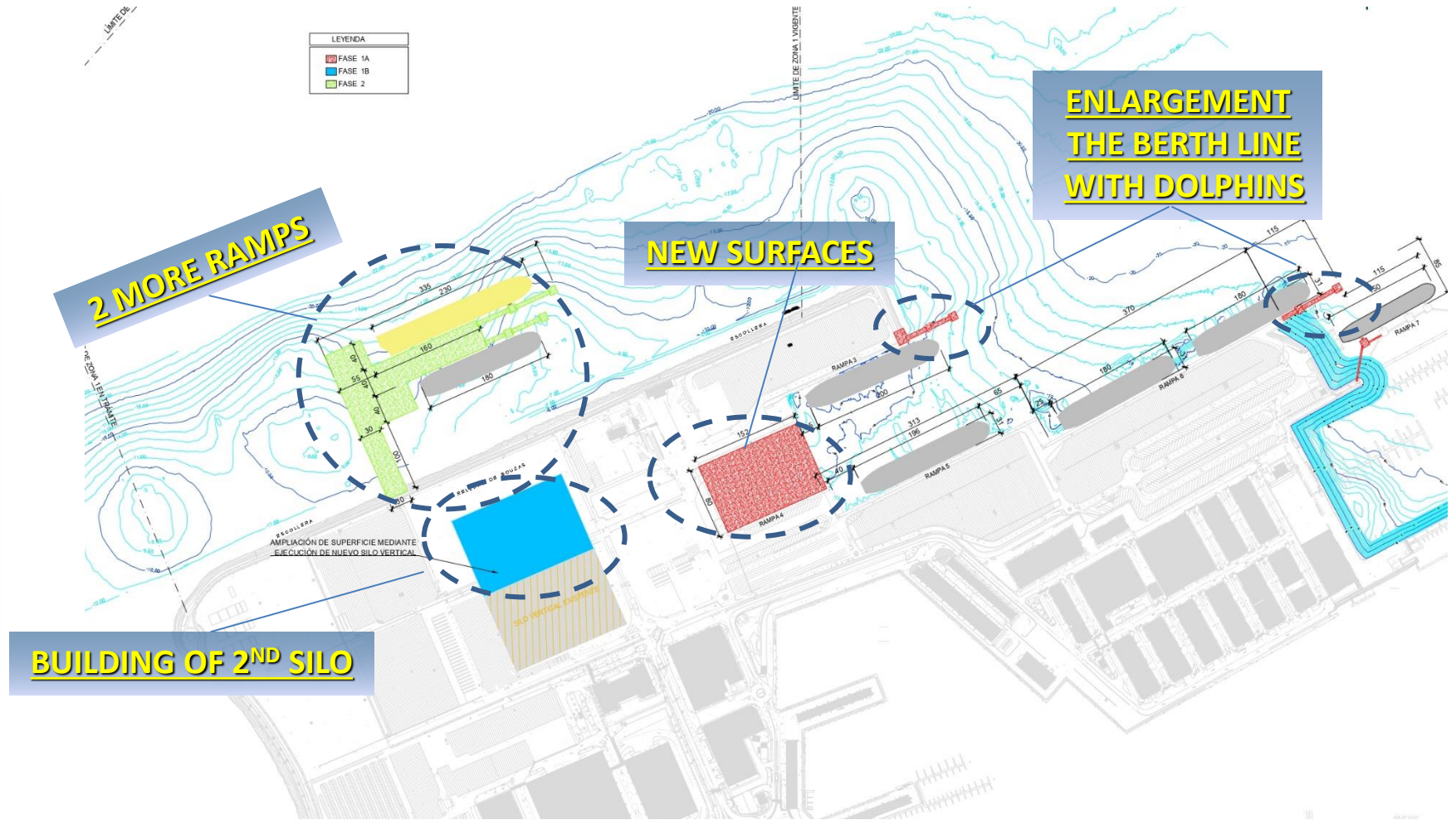


Mercedes-Benz



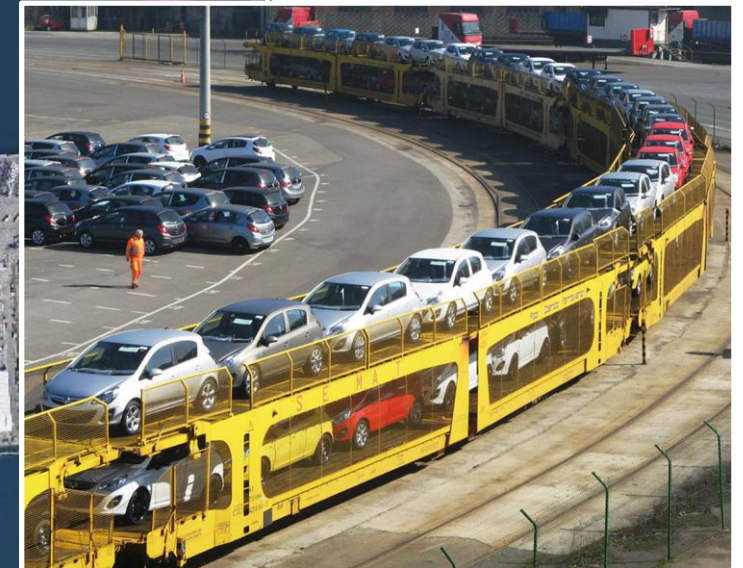
RORO PLUS TERMINAL :

FUTURE IMPROVEMENTS AND ENLARGEMENT PROJECTS



RORO PLUS TERMINAL : railway connection

FUTURE IMPROVEMENTS AND ENLARGEMENT PROJECTS



Thanks for your attention



www.apvigo.com

A white ceramic coffee cup filled with a frothy, golden-brown coffee beverage, sitting on a matching white saucer. The cup and saucer are placed on a dark, textured surface. A semi-transparent white rectangular box is overlaid on the left side of the image, containing blue text.

Coffee break

See you at 11:05!

Presentation by the sponsor: Termicar

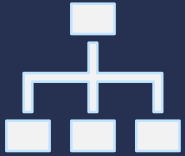




TERMICAR VIGO

Corporate and Activity Presentation

The bussiness



Structure

Highly experienced,
qualified and flexible
supported by our
Shareholders



Core Bussines

Integral vehicle Logistics



Stakeholders

Port operations in
coordination with main
EOM's and main Shipping
lines



Other activities

Value – added logistics
On cars and other H/H cargo

We aspire to deliver the more adapted and flexible solutions to OEMs and Shipping lines. Our values ensure that we always have the best work and provide services of the highest quality.



Who we are...

TERMICAR VIGO S.L.

Established on December 2002, by the shareholders



The main company activity consisting of export volumes. Stellantis Group largest production factory being located at Vigo, represent close to 90 % of the volume handled per year.

In addition to other main OEM's: Toyota, Mercedes, Renault...



Owner

NYK owns 100% of UECC

1990 1991

Co-owner

Wallenius Lines owns 50% of UECC



1.mill

Cars transported

1997



2.mill

Annual volumes exceed 2 million units

2004 2006



New multi-storage garage

Contract signed for a new multi-storage garage in Pasajes



Liner trading network

Launched liner trading network. 32 vessels reduced to 18 vessels



Delivery of LNG vessels M/V AUTO ECO & M/V AUTO ENERGY

Naming Ceremony of M/V AUTO ECO

2010



New LNG battery hybrid vessels

Delivery of 1x Auto TBN

Delivery of 2x Auto TBN

Ordered 3 battery hybrid LNG PCTCs, ensuring that we in July 2022 have the most environmentally-friendly fleet in our industry



Bio-fuel

First in our industry to introduce bio-fuel

2016



New LNG battery hybrid vessels

Delivery of 1x Auto TBN

Delivery of 2x Auto TBN

Ordered 3 battery hybrid LNG PCTCs, ensuring that we in July 2022 have the most environmentally-friendly fleet in our industry

- Founded in 1870
- 4.500 employees
- 5,6 Billion revenue

port operations and shipping

10.000 vessels operated
10.000 vessels as shipping agents
1,3 million vehicles handled
5 locations with FVL activities in Spain
4 locations in Colombia, Peru and Ecuador
30 Million tons handled

vehicle logistics

11 VPC in Spain through Bergé GEFCO
4,2 Million sqm dedicated to FVL
1,7 Million vehicles transported in 2022
925 car transporters
160 railwagons
40.000 sqm workshop

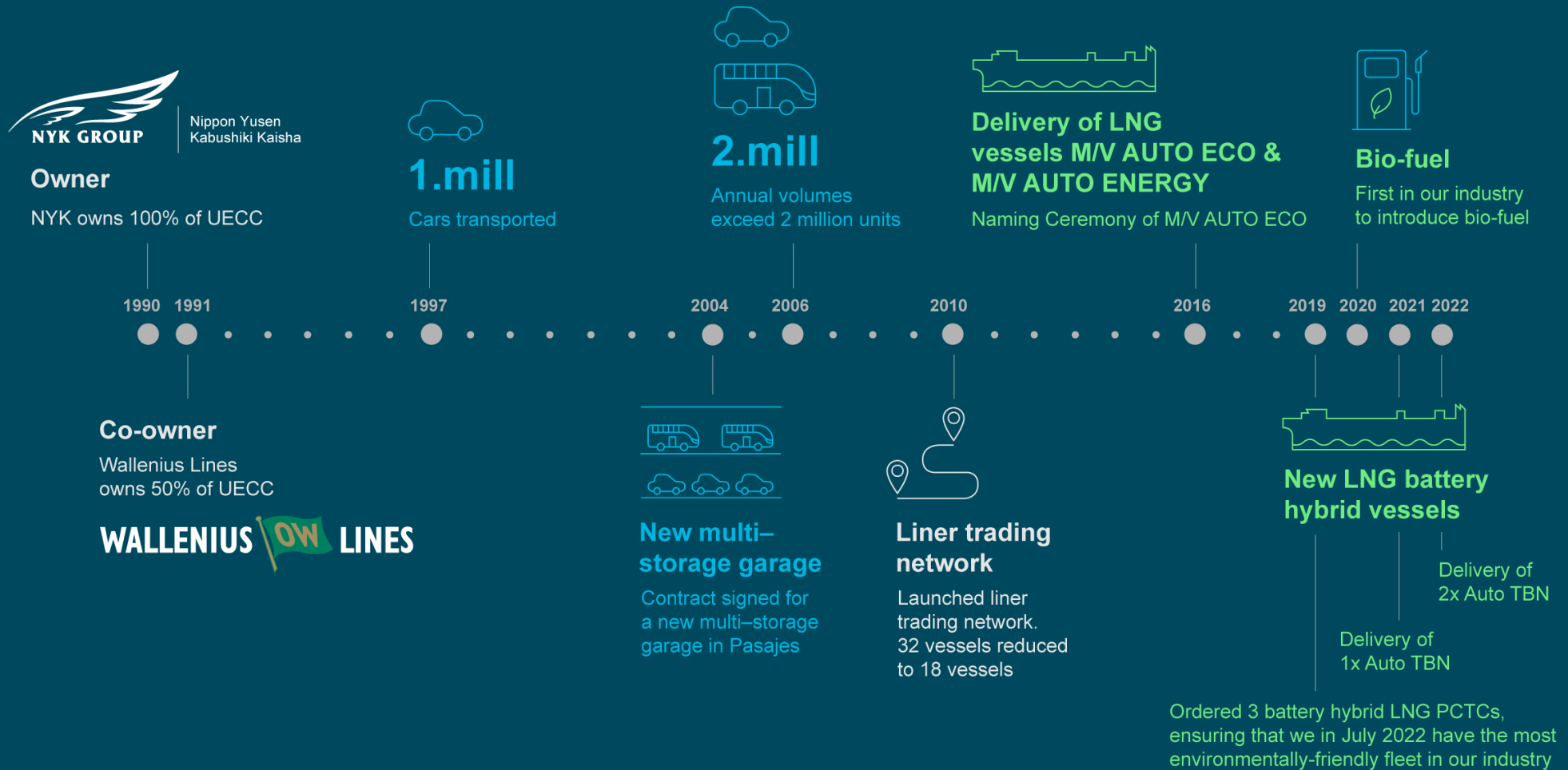
value-added logistics

Releasing agent activities
500.000 vehicles handled
12 Million tons Steel products
Last Mile Logistics
Supply Chain Logistics / Industrial
Logistics

Astara

19 countries
230.000 vehicles sold in 2022
5 Billion revenue
Latin America, Europe and Asia
2.000.000 vehicles sold since 1979

Our history





OBJETIVES AND COMMITMENTS

- Cover the full time production and vessel operations
- High flexibility on reception and delivery times
- Highly experienced, qualified and flexible workforce
- Added value works (Vehicle Processing Center)
- Provider of main OEM's
- Provider of main Shipping lines
- Terminal Provider for the 85% volume of Stellantis Vigo
- Deliver highest quality and safety levels
- Quality and responsible environmental respect



Stakeholders

STELLANTIS



Mercedes-Benz



TOYOTA



RENAULT



mitsubishi



SEAT



HÖEGH AUTOLINERS

HYUNDAI
GLOVIS

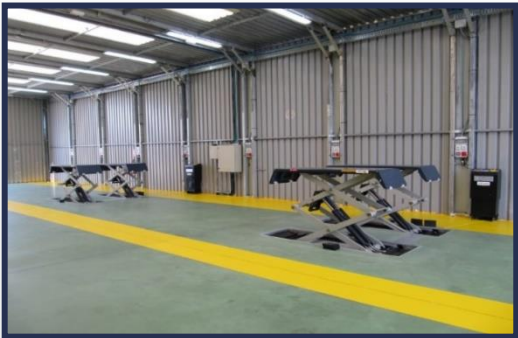
NEPTUNE LINES

- Dedicated space for added value activities on cars and H/H cargo

- Strategic location, on the gates access to control the cargo
- 2,000 sqm for all types of cargo handling operations



Value Added Services



Thanks for your support and attention

Presentation by the sponsor: Suardiaz







Maritime



Road



Rail



Air



Multimodal Logistics Solutions

Motorways of the sea

10 years operating the current **Motorway of the Sea** Vigo - Saint Nazaire

A **second MoS** Vigo - Liverpool will be launched in Sep. for the D2D service of Stellantis Ellesmereport factory.

FARO DE VIGO

Suardiaz hará una terminal de 38.000 m² € para la autopista del mar con Vigo

La naviera invierte casi 12 millones con el grupo Peel Ports en un muelle para pedir más espacio para semirremolques en Bouzas y...



ACONTECER MARÍTIMO - DESTACADO

Suardiaz abrirá una autopista del mar entre Vigo y Liverpool



Juan Carlos Díaz Lorenzo · 12 diciembre, 2022

Suardiaz conectará el puerto de Vigo con Liverpool para Stellantis a partir de junio de 2023

04/01/2023

Grupo Suardiaz prestará un servicio de transporte semanal entre los puertos de Vigo y Liverpool. Según un comunicado, la naviera utilizará buques fabricados por proveedores esportados por Peel Port, en el estuario del Mersey.

FARO DE VIGO

La autopista del mar a Liverpool funcionará en junio y moverá 14.700 tráileres cada año

Dos buques realizarán dos frecuencias semanales | Se suministrarán a la planta del Reino Unido casi el 90% de los componentes para fabricar 51.000 furgonetas eléctricas anuales | Bueno: "Es un hito para Stellantis"



SUARDIAZ RORO TERMINAL



SUARDIAZ RORO TERMINAL

Vigo

- LME belongs to **Suardiaz Group**
- **Reception and delivery** of merchandises
- **Stevedoring in RoRo vessels:** vehicles, semi-trailers, roll-trailers, trucks, machinery, etc.
- **Surveyor services** according to the client standards
- **Handling tasks:** Workshop/PDI, battery recharging, programmable carwash system, labelling, etc.
- **Break bulk and Project cargo:** discharge of steel sheet coils, aluminum lingots and billets, building structures, etc.
- **Handling and lashing** of different cargo on roll-trailers, including containers, machinery and static pieces
- **GESTPARK:** Innovative and traceability information system
- **Warehousing Services**



Stevedoring



Terminal Handling



Surveying



Warehousing



PPO & PDI

Vehicle Transformation & PDI



LME has a **workshop/PDI** inside the terminal with an area of 800 m², where mechanical and electrical operations

Automated programmable carwash system.



WORKSHOP

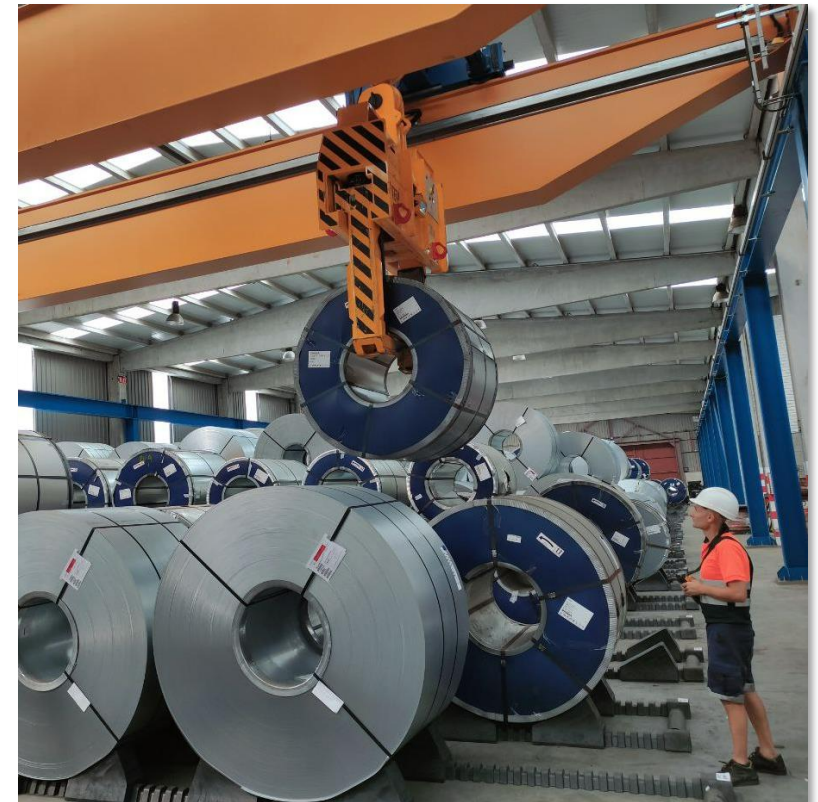


Warehouse & General Cargo

LME also carries out very diverse operations of general cargo

Stevedoring and management of **steel sheet coils, aluminum ingots or beams, windmills parts and frameworks for construction sites.**

- Bonded warehouse of 2.000 m²
- Weight resistance 3.000 kg/m²
- Height of 6,83 m
- Gantry crane of 32 ton





Round table discussion

- ✓ Ukraine crisis
- ✓ Congestion issues
- ✓ Capacity crisis
- ✓ Docker shortage
- ✓ PECs

Briefing paper update March 2023

Briefing Paper on Capacity Crisis

OCTOBER 2022

Includes March 2023 update

- Fragmentation of the market with shippers taking control of dedicated resource that reduces the efficient use of assets even more.
- Road transport
 - ✓ Significant orders for car transporters
 - ✓ Lead times for trucks remain long (15 months or more)
 - ✓ Driver shortage
 - ✓ Legislation – Mobility package; cabotage
 - ✓ The efficiency of the overall fleet is now being further, and significantly, impacted by several factors:
 - Transporters being leased for dedicated use
 - Port congestion



Briefing paper update March 2023

Briefing Paper on Capacity Crisis

OCTOBER 2022

Includes March 2023 update

- Shipping

- ✓ Confidence returning with increasing order of Ro-Ro vessels
- ✓ 45 vessels are scheduled for delivery in both 2024 and 2025
- ✓ Port congestion
- ✓ Terminal operations are also impacted with many close to gridlock

- Rail

- ✓ Little has changed – increased pressure on other modes mostly road

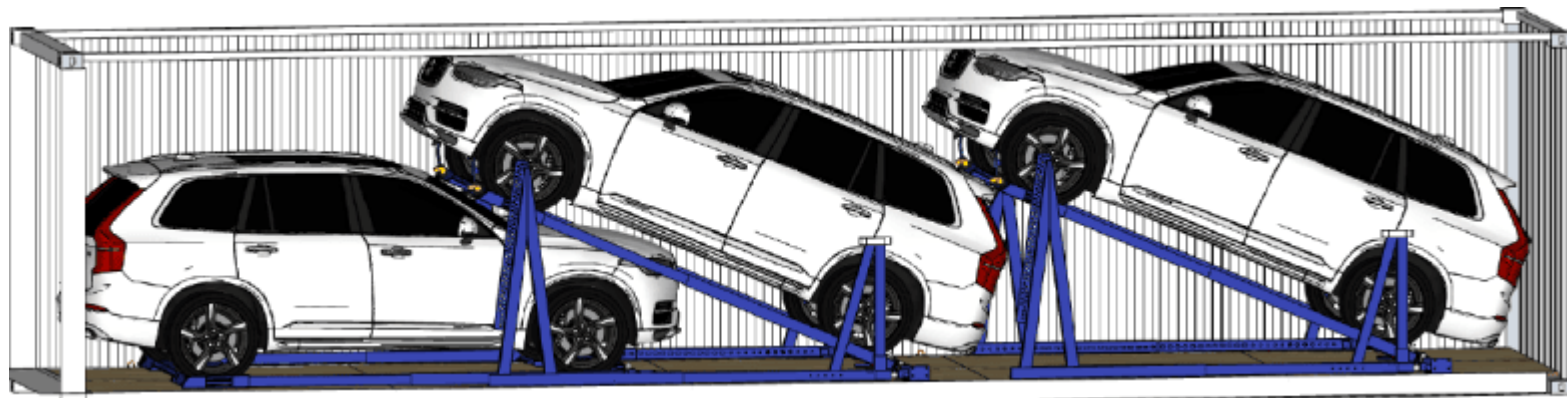


ECG Update: Transport of cars in containers



Transport of cars in containers

- Due to the lack of Ro-Ro capacity and the decrease of maritime transport costs for containers, the volume of cars transported in containers has grown (no stats available though...)
 - Temporary solution for some OEMs (Cost, lead time, Quality, damages),
 - But will be used as a major transport means for some others (especially from Asia)
- Increasing trend in H2 2022 & Q1 2023



Transport of cars in containers

• Issues observed

- Different stuffing solutions and instructions for different OEMs
- Lack of technical instructions (surprise when opening containers!)
- H&S concerns when vehicles are on palette
- Humidity in the containers
- Anything else you can share?

• Next steps

- ECG Quality WG has initiated a dedicated sub-group to amend the Operations Quality Manual's relevant chapter
- All transport modes will be looked at
- OEMs, shipping lines, terminals, inspectors, trucking companies are participating





Update on ECG activities

Mike Sturgeon, ECG

ECG Roadmap 2023

INFORMATION & AWARENESS

- [ECG Website](#)
- [NEW ECG News page](#)
- [ECG LinkedIn & Twitter pages](#)
- [Briefing Papers](#)
- [President's Report](#)
- [Business Intelligence](#)
- [Industry topics page](#)
- [ECG Survey 2022-2023](#)
- [ECG Quarterly Survey](#)
- [Fuel prices](#)

NETWORKING & INTEGRATION

- More than 140 ECG Members & Partners
- [ECG Academy Alumni Meeting, Barcelona, Spain, 9-10 February](#)
- [General Assembly & Spring Congress, Thessaloniki, Greece, 11-12 May](#)
- [ECG Conference, 12-13 October, Copenhagen, Denmark](#)
- [Maritime & Ports Working Group](#)
- [Eastern Europe Regional Meetings](#)
- [UK & Ireland Regional Meetings](#)

EDUCATION

- [ECG Academy 2023/24 & 2024/25](#)
- [Negotiation Management](#)
 - Standard course
 - Advanced course 'Big Mountain'



STANDARDISATION

- Co-operation with AIAG, Odette & the VDA
- Co-operation with OEMs
- FVL Industry Meetings

2023 Strategic Objectives

- FVL Cost Index - Q1
- Emissions reporting standardisation - Q3
- Update the forecasting methodology - Q2
- Digital Vehicle Handover Standardisation

LOBBYING & REPRESENTATION

- 2023 Dinner Debate
- [Lobbying campaign on Weights & Dimensions](#)
- [National legislations booklet will be updated](#)
- Co-operation with ACEA, ECSA and other associations
- ECG is a member of ALICE, ASA, DTLE, ELP, ESSF and IRU, among others

Industry Working Groups

- **Capacity**
 - [Revision of Standard for forecasting developed for FVL sector](#)
- **Health & Safety**
 - [NEW Online Incident Reporting website](#)
 - [Safe Loading Guidelines in 13 languages](#)
 - [ECG Guidelines on Safe Yard Design](#)
 - Improving safety when delivering at retailers
- **Quality**
 - [ECG Visual inspection guidelines](#)
 - [Operations Quality Manuals](#)
 - [EMSA guidance document on Alternative Fuel Vehicles](#)
 - [Upcoming changes to the VDI standards on lashing of vehicles on board car transporters](#)

Sustainability

- Standardisation of emissions calculation & reporting in FVL

Digitalisation

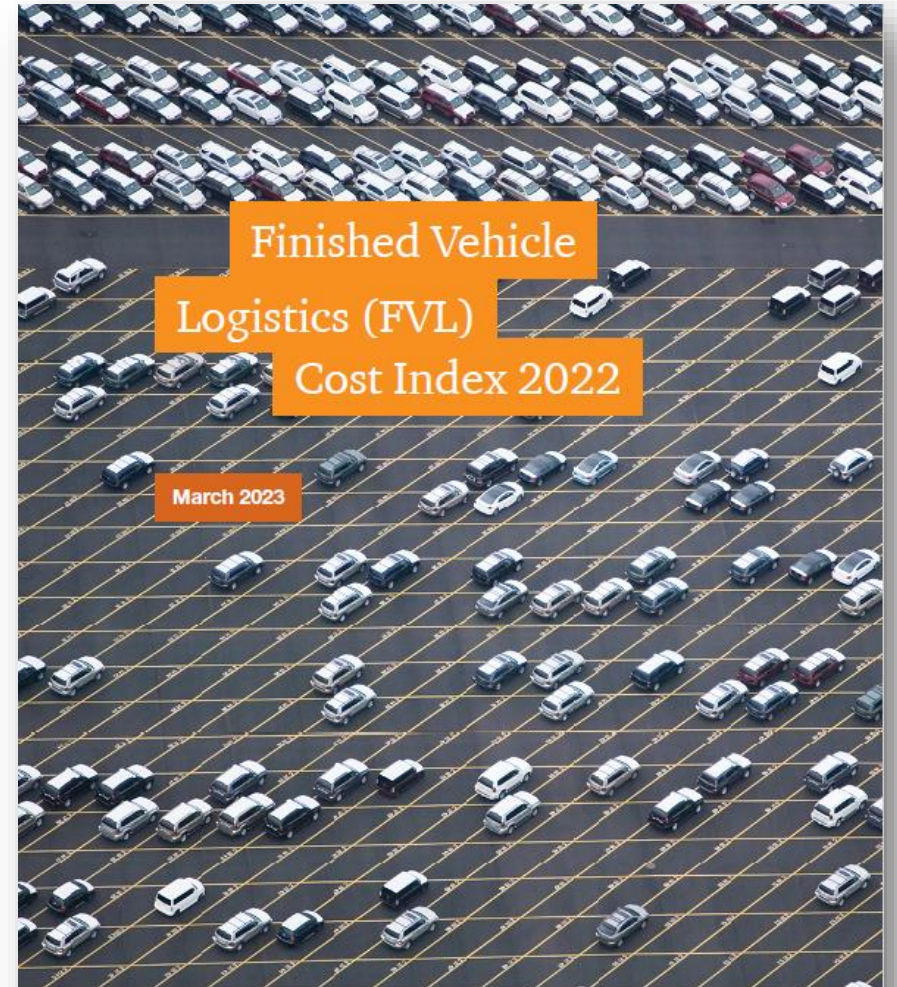
- [ECG-Odette standard for VIN labels in the supply chain](#)
- [KPIs for Finished Vehicle Logistics](#)
- [Digital Vehicle Handover Processes](#)
- [Standardisation of FVL Digital messages - version 1.1 available](#)
- [Standard Connectivity audit for vehicle logistics sites - update will come soon](#)

2023 Strategic objectives



FVL Cost Index

- Launch webinar: 2 March
- A new instrument to monitor the development of costs in Finished Vehicle Logistics (FVL)
- Supported by PwC Austria, provides further transparency of the FVL industry
- Covers four areas of transport – road, rail, sea and compound – and refers to a representative selection of markets in Europe



2023 Strategic objectives



FVL Cost Index

We need your feedback!



2023 Strategic objectives



Emissions reporting standardisation

- Project started at the beginning of February
- ECG, VDA and other OEMs (Toyota Motor Europe, Nissan + Others) will develop the first methodology to calculate and report on automotive supply chain emissions.
- Specific project with Smart Freight Centre and shipping lines started on Ro-Ro methodology.
- The methodology will be based on the upcoming ISO 14083 standard
- It will be published in Q3 2023





Companies who joined WG



HÖEGH AUTOLINERS



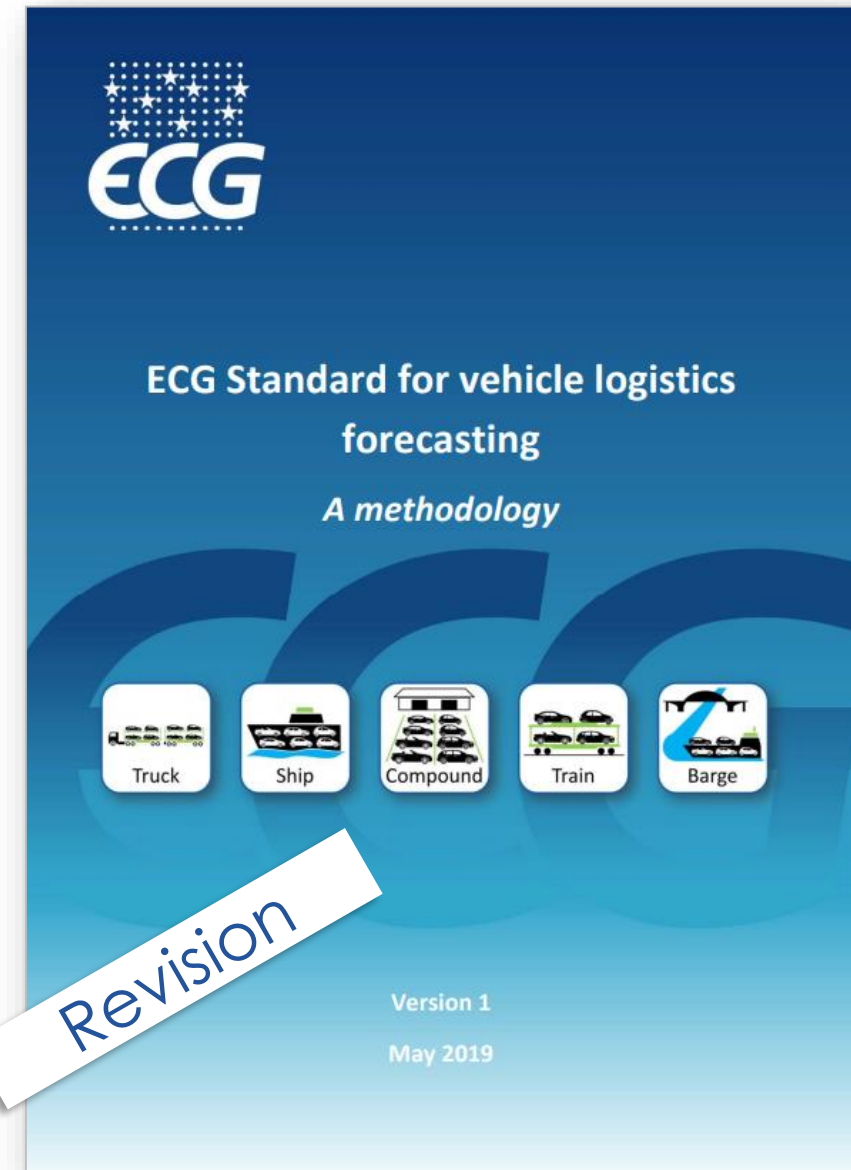
GRIMALDI GROUP



2023 Strategic objectives

Forecasting methodology update

- Published in May 2019
- ECG started a project with ICDP in January
- 6 OEM and 6 LSP interviews are held – qualitative approach
- The revised document will incorporate contingency planning for an unstable environment
- Presentation by ICDP at the General Assembly in Thessaloniki



Dinner debate at the European Parliament



**“Who will deliver your next car?”
Driver shortage in vehicle logistics**



Tuesday, 21th March 2023

European Parliament, Members' Restaurant

Welcome Cocktail from 18:30



Working group updates

Digitalisation WG

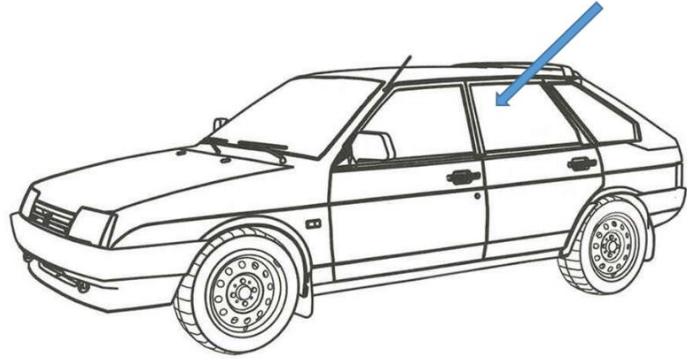


VIN labels in the supply chain

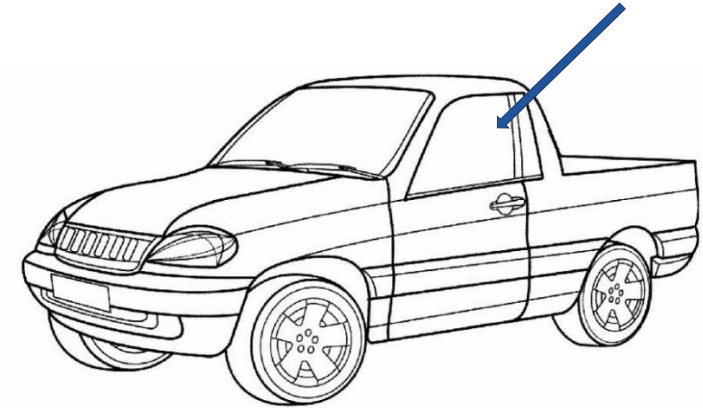
- Joint project with Odette between June 2021 and November 2022
- Work based on ECG's own work and document on the subject
- Final document published in December



VIN label placement

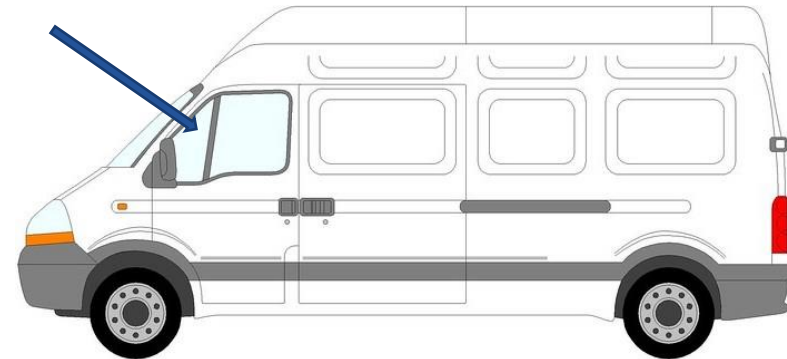


ECG's tests determined that the best location for the label is the left corner of the left rear side window – for both left-hand drive and right-hand drive vehicles.



For pickups without rear side windows the recommendation is the right corner of the left front side window.

For vans, the recommendation is the fixed part of the left front window (if there is one), above the mirror (as the mirror might get folded and hide the label).



Health & Safety

**Making the industry safer -
Reducing accidents in FVL**

2019 incidents & analysis

OCTOBER 2020



**Making the industry safer -
Reducing accidents in FVL**

2020 incidents & analysis

JUNE 2021

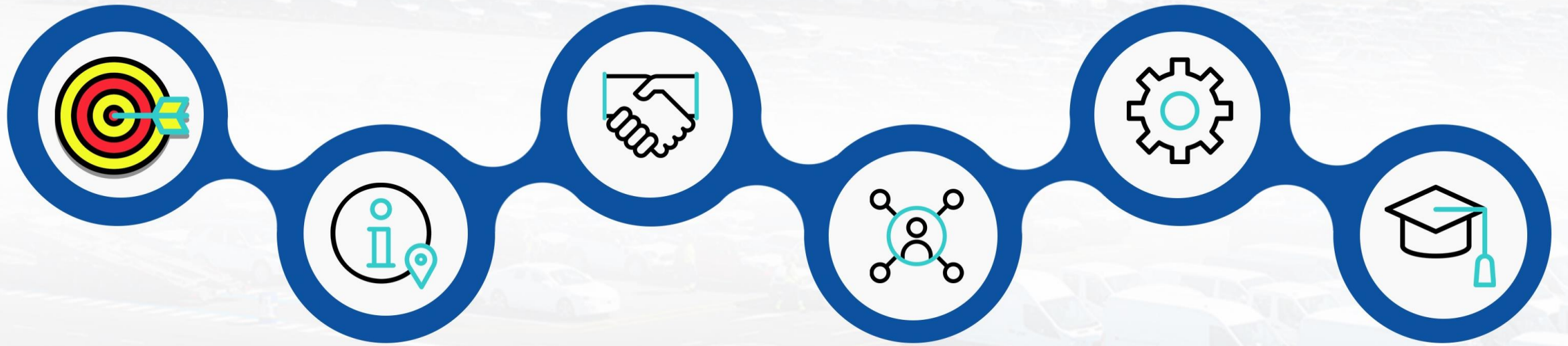


Yearly report on 2021 and 2022 incidents in truck transportation
Q2 2023

 **ECG** The Association of European Vehicle Logistics







ECG Events and Education

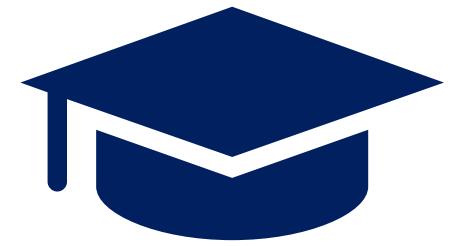
General Assembly and Spring Congress

 **Thessaloniki, Greece**

 **11-12 May 2023**

ECG Conference

 **Copenhagen, Denmark**
 **12 - 13 October 2023**



**Applications for our
Course 17 are now open!**



Next meeting(s)



Next meeting dates



Bristol, UK

- 29 June (preferred)
- 12 July



- We have been invited to the Port of Barcelona for the autumn meeting