



International Maritime Statistics Forum 2016

Piraeus Port Authority: Current Situation and Future Challenges

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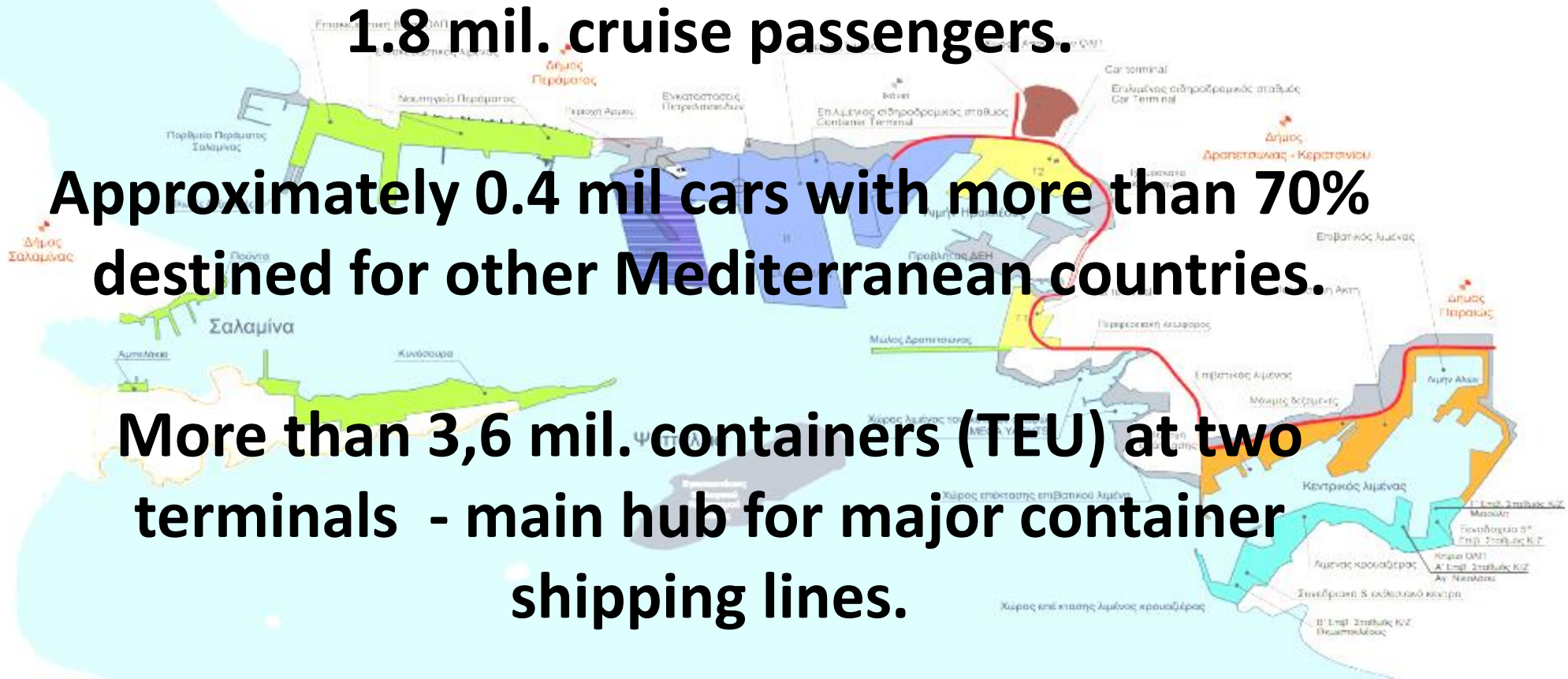
PIRAEUS PORT IN A GLANCE

18mil. Passengers per annum.

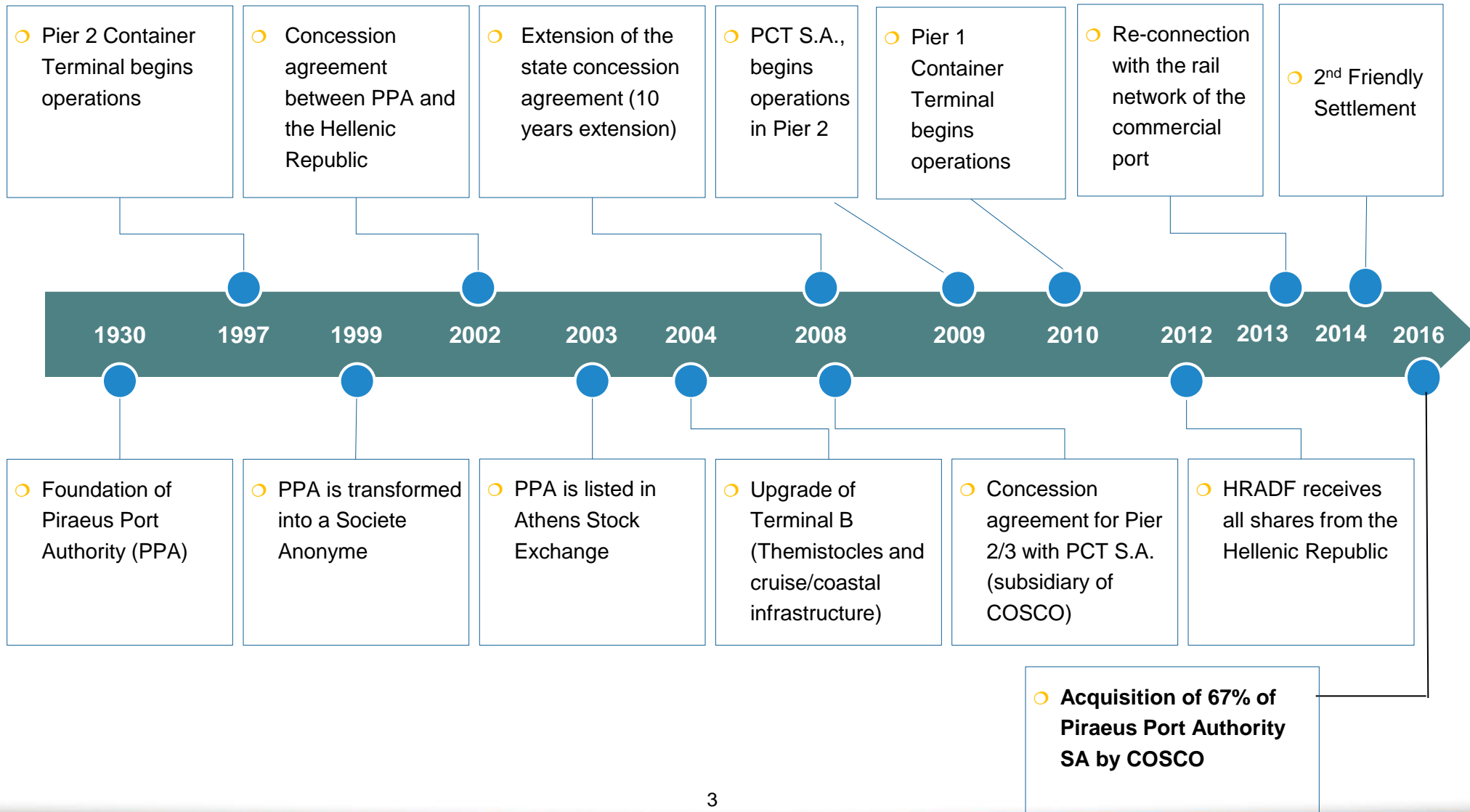
1.8 mil. cruise passengers.

Approximately 0.4 mil cars with more than 70% destined for other Mediterranean countries.

More than 3,6 mil. containers (TEU) at two terminals - main hub for major container shipping lines.



Key Milestones



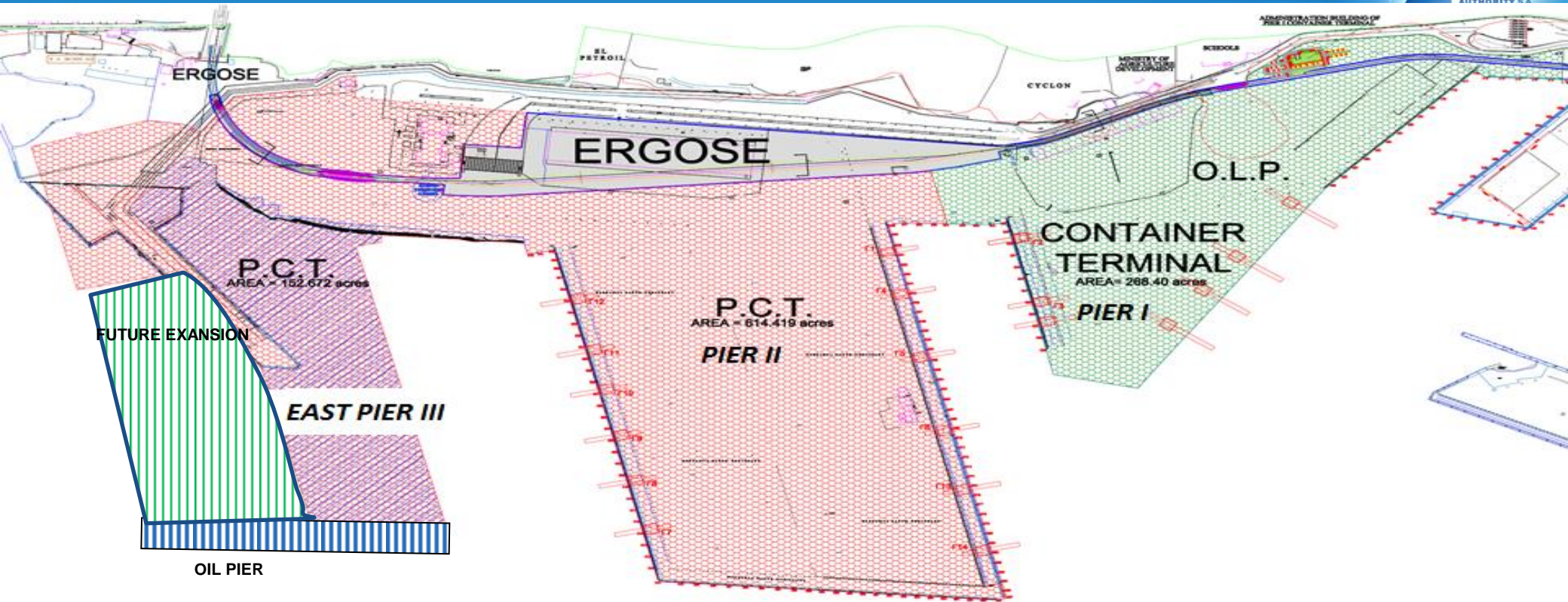


Container Terminal

1 Container Terminals



- Top 10 largest container ports in Europe (in terms of throughput)
- Hub for transshipment in the Mediterranean and Black Sea
- Ideal gateway to the East Mediterranean
- Serves the largest shipping companies and has robust infrastructure capable of serving the largest container carriers
- Provides rail connection to central Europe and the Balkans
- Operates (24x7) and offers scaled tariffs based on volume of transshipment containers
- Offers competitive storage fees, international safety standards, surveillance cameras and a monitored gateway system
- Offers a full array of port facilities (water, repairs, bunkers and slops)



PIRAEUS PORT CONTAINER TERMINAL

PIERS II & III UNDER CONCESSION

PIER I OPERATED BY PPA SA

CURRENT CAPACITY OF PIRAEUS PORT: 4.7mil.TEU

FUTURE CAPACITY AFTER THE COMPLETION OF NEW INVESTMENT

6.2 mil. TEU

AMONG TOP – 10 IN EUROPE

Container volume in 1000 TEU

R		1985		2000		2014	Ratio 2014/1985
1	Rotterdam	2655	Rotterdam	6275	Rotterdam	12297	4.6
2	Antwerp	1243	Hamburg	4248	Hamburg	9729	8.4
3	Hamburg	1159	Antwerp	4082	Antwerp	8978	7.2
4	Bremerhaven	986	Felixstowe	2793	Bremerhaven	5796	5.9
5	Felixstowe	726	Bremerhaven	2752	Algeciras	4556	13.0
6	Le Havre	566	Gioia Tauro	2653	Valencia	4442	14.6
7	Marseille	488	Algeciras	2009	Felixstowe (*)	3734	5.1
8	Leghorn	475	Genoa	1501	Piraeus	3650	18.5
9	Tilbury	387	Le Havre	1465	Gioia Tauro	2970	**1995
10	Barcelona	353	Barcelona	1388	Marsaxlokk	2900	**1987
11	Algeciras	351	Valencia	1310	Le Havre	2554	4.5
12	Genoa	324	Piraeus	1161	Genoa	2173	6.7
13	Valencia	305	Southampton	1064	Zeebrugge *	2046	9.4
14	Zeebrugge	218	Marsaxlokk	1033	Barcelona	1893	5.4
15	Southampton	214	Zeebrugge	965	Southampton (*)	1748	8.2

(*) estimate

(**) year of start operations

Source: Theo Notteboom, based on statistics individual port authorities



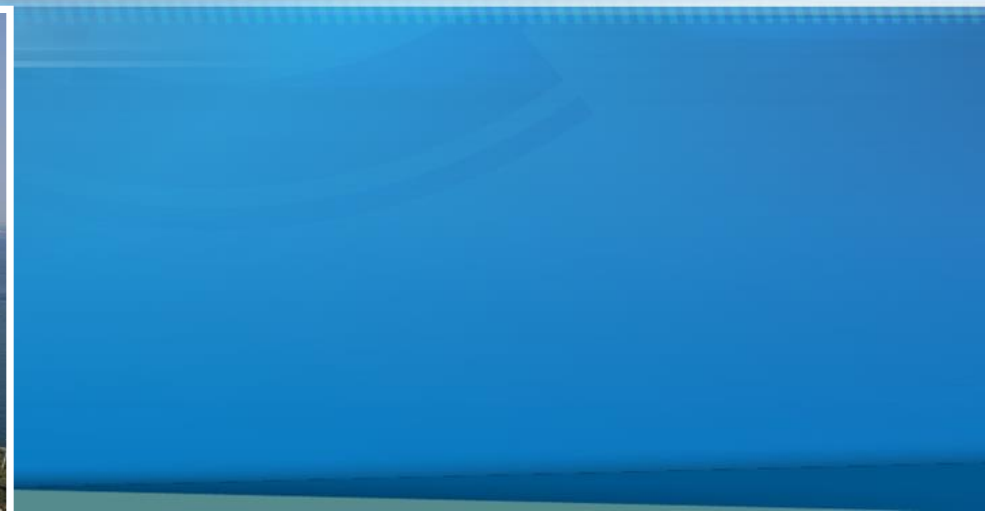
PORT LEAGUE Top Ports ranked by 5-year increase ratio 2009-2013 (1000 TEU)

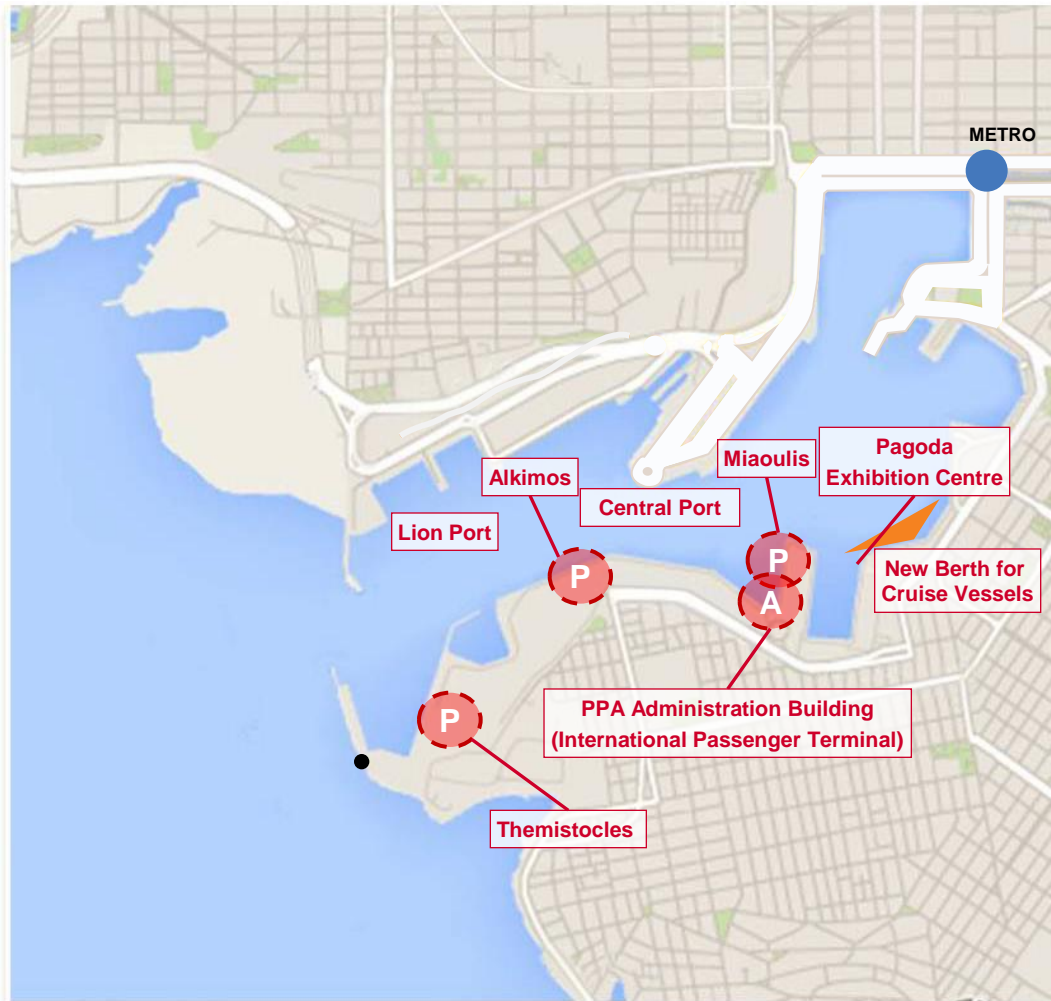
Rank	Port Name	2009	2013	Growth Rate (2013/2009)	Country
1	Piraeus	665	3,163	476%	Greece
2	Duisburg	935	3,000	321%	Germany
3	Dalian	4,552	10,860	239%	China
4	Taicang	1,513	3,267	216%	China
5	Yingkou	2,537	5,301	209%	China
6	Ambarli	1,836	3,378	184%	Turkey
7	Lianyungang	3,020	5,490	182%	China
8	Jakarta/Tanjung Priok	3,804	6,590	173%	Indonesia
9	Xiamen	4,680	8,010	171%	China
10	Ningbo	10,502	17,351	165%	China
11	Ho Chi Minh/Saigon	3,563	5,542	156%	Vietnam
12	Santos	2,252	3,445	153%	Brazil
13	Balboa	2,011	3,063	152%	Panama
14	Qingdao	10,260	15,520	151%	China
15	Tianjin	8,700	13,010	150%	China
16	Algeciras	3,042	4,500	148%	Spain
17	Busan	11,980	17,686	148%	Korea
18	Jeddah	3,091	4,561	148%	Saudi Arabia
19	Port Klang	7,309	10,350	142%	Malaysia
20	Khor Fakkan/Sharjah	2,750	3,800	138%	Oman

1) Source: For 2009 figure, "Containerisation International Yearbook" (2004~2012) data was used. For 2013, "Top 100 ports 2014 of Containerisation International" data was used.



Cruise Operations

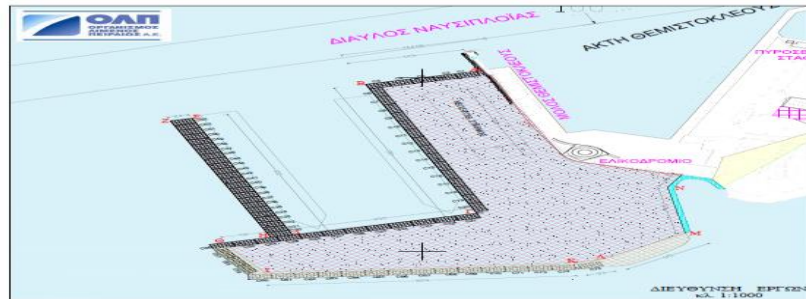




- The center of the Mediterranean cruise experience
- Close proximity to tourist destinations in the Aegean
- Athens being the historical capital of Europe is amongst the top tourist attractions in Greece
- Total quay length of 2.8 km and draft of up to 11m
- Handles 600 cruise ships and 1.9 MM cruise passengers every year; comprises slots for 200 coaches and provides a helipad for VIPs
- Operates (24x7) 2 passenger stations (10,000 m²) and offers free shuttle bus service around the cruise port
- 9-11 simultaneous berthing places including 2-3 berths for new generations vessels
- Offers a full array of port facilities (water, repairs, bunkers and slops)

 Under Construction

Cruise



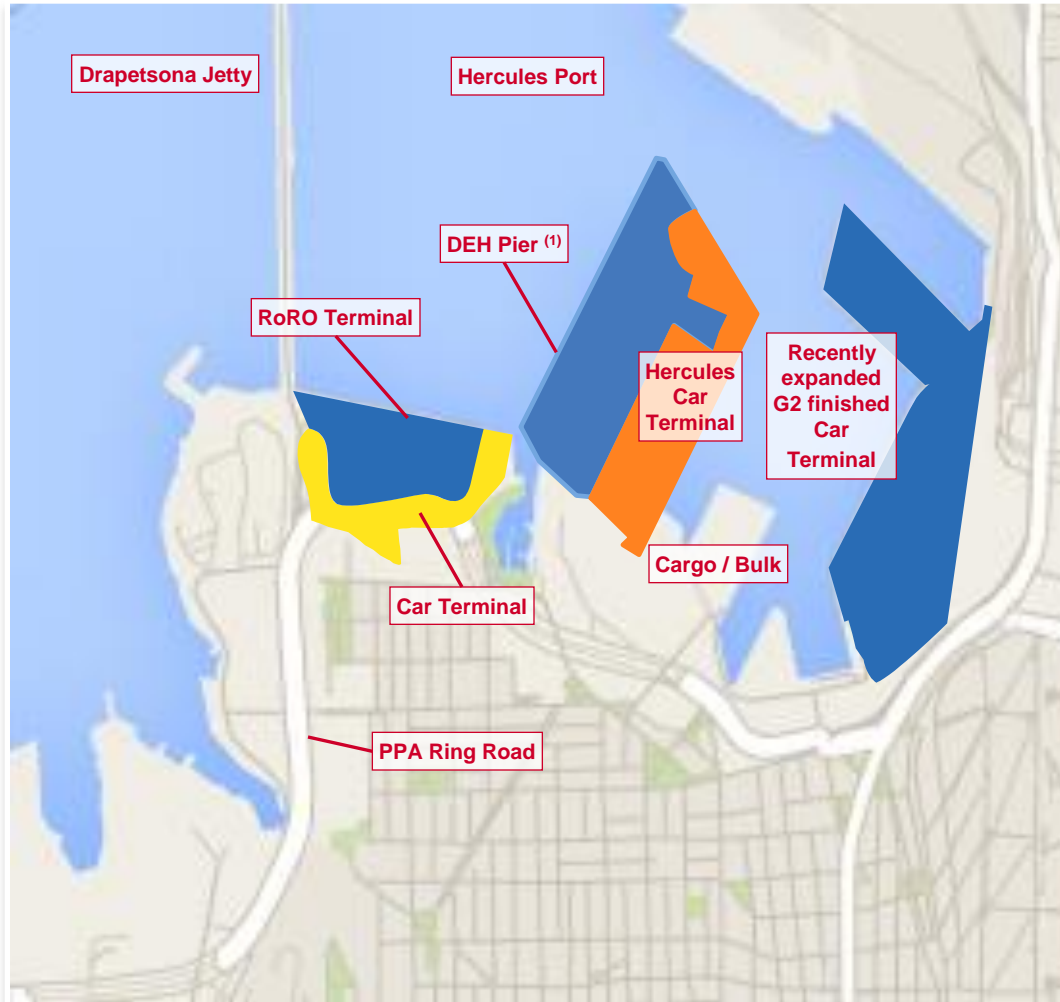
Strategy and Key Initiatives


- Expansion of the Southern Port with three new cruise berths (350m+), each capable of handling new generation ships. It has been approved Community Funding 95% of the total budget.
- Additional berth under construction at Agios Nikolaos (280m+)
- Certification of “ECOPORT” port in the framework of ESPO ⁽¹⁾ guidelines
- Certificates of International Standards (EN ISO 9001 2008 and EN ISO 14001 2004)



Car Terminal





 To be constructed

Note:

1. DEH is the major power utility supplier in Greece

- Multiple Hub Car terminal in Eastern Europe
- Currently operates 2 terminals of approximately 190,000 m² and 1.5 km of quay wall
- Railway connection
- Annual throughput of c. 0.5 MM vehicles
- Operates (24x7) surveillance cameras
- Offers a full array of port facilities (water, repairs, bunkers and slops),
- Close to zero damage record

Car Terminal



Strategy and Key Initiatives

- One of the largest car terminals in Eastern Mediterranean
- Expand capture area through rail connection
- Expand current capacity through connection with ex ODDY area
- Tariff policy based on relative pricing of transshipment cargo

Rail Connection of Piraeus Port



Connected with two Pan – European Rail Aces of the Trans European Transport Network (TEN-T).

4 available loading lines: 3 with stable and 1 with mobile ramp

The car park of the Port can accept **simultaneously up to 11 double deck wagons**

Average loading time for a train is 2 hours (due to simultaneous loading in 4 lines)

Overall length of 11 wagon train is 290.40 meters



Largest Port in Greece and one of the Largest in the Mediterranean Sea with Terminals for Container, Passenger, Cruise, Car and full ancillary services



Significant Business Growth Prospects



Greek and Mediterranean Macro Recovery will Provide Impetus to Trade Flows from Piraeus Port

- ✓ Smooth, efficient and quick passage of PPA to the new regime after privatization
- ✓ Consolidating the position and role on the market
- ✓ Improving the level of infrastructure, superstructure but also of service provided
- ✓ Centralized port cluster - Development of a Port Community System
- ✓ Improve connection with the Trans-European Transport Network
- ✓ Participation in International projects – collaboration with reputable partners
- ✓ Improve the environment performance
- ✓ Improve relationship Port – city - Promoting CSR port



Thank you for your attention!