International Maritime Statistics Forum 2016

Piraeus Port Authority: Current Situation and Future Challenges

ATHENS, 11th MAY 2016

Dimitris Spyrou,
Director of Administration
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

- Pier 2 Container Terminal begins operations
- Concession agreement between PPA and the Hellenic Republic
- Extension of the state concession agreement (10 years extension)
- PCT S.A., begins operations in Pier 2
- Pier 1 Container Terminal begins operations
- Re-connection with the rail network of the commercial port
- 2nd Friendly Settlement

- Foundation of Piraeus Port Authority (PPA)
- PPA is transformed into a Societe Anonyme
- PPA is listed in Athens Stock Exchange
- Upgrade of Terminal B (Themistocles and cruise/coastal infrastructure)
- Concession agreement for Pier 2/3 with PCT S.A. (subsidiary of COSCO)
- HRADF receives all shares from the Hellenic Republic

- Acquisition of 67% of Piraeus Port Authority SA by COSCO
Container Terminals

- Top 10 largest container ports in Europe (in terms of throughput)
- Hub for transhipment 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 transhipment 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

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<td>2653</td>
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<td>Marseille</td>
<td>488</td>
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<td>8</td>
<td>Leghorn</td>
<td>475</td>
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<td>Le Havre</td>
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<td>Barcelona</td>
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<td>Southampton</td>
<td>214</td>
<td>Zeebrugge</td>
<td>965</td>
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(*) estimate

(**) year of start operations

Source: Theo Notteboom, based on statistics individual port authorities
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<tbody>
<tr>
<td>1</td>
<td>Piraeus</td>
<td>665</td>
<td>3,163</td>
<td>476%</td>
<td>Greece</td>
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<td>15,520</td>
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<tr>
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<td>Tianjin</td>
<td>8,700</td>
<td>13,010</td>
<td>150%</td>
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<tr>
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<td>4,500</td>
<td>148%</td>
<td>Spain</td>
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<tr>
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<td>11,980</td>
<td>17,686</td>
<td>148%</td>
<td>Korea</td>
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<tr>
<td>18</td>
<td>Jeddah</td>
<td>3,091</td>
<td>4,561</td>
<td>148%</td>
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<td>19</td>
<td>Port Klang</td>
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<td>2,750</td>
<td>3,800</td>
<td>138%</td>
<td>Oman</td>
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</table>

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.
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)
Overview of Cruise Operations

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)
- 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

**Note:**
1. DEH is the major power utility supplier in Greece
Overview of Car Terminal Operations

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 competitive ports with regards to transshipment cargo
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
Key Attractions for Piraeus

- 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
Coming challenges for 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!