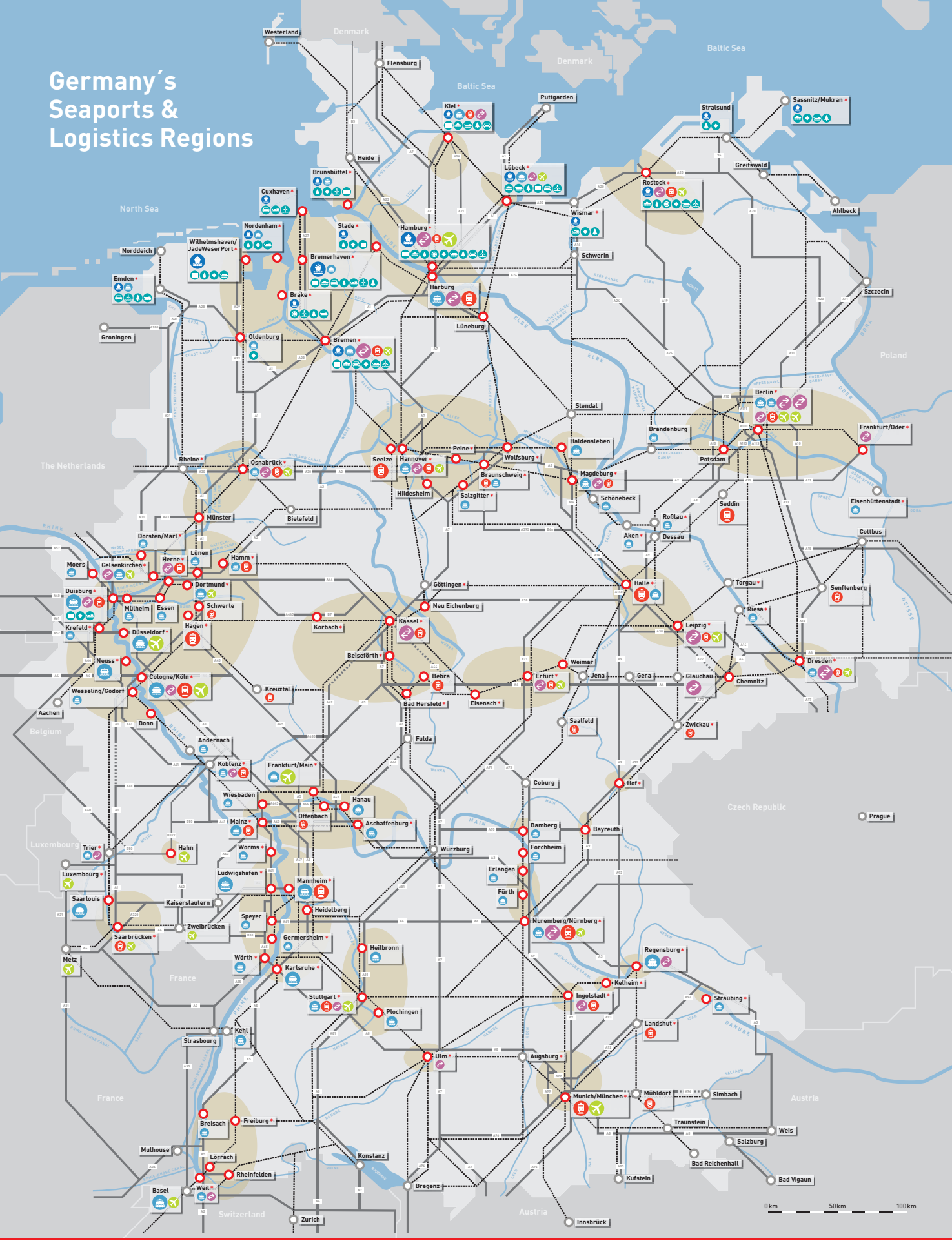
Germany's Seaports

Connecting Europe with the World

Industry Brochure

GERMANY
TRADE & INVEST

Germany´s Seaports & Logistics Regions



Major Railways	Logistics Regions	Seaports	Rail Freight Hubs	Containers/ General Cargo	Mineral Oils/ Liquid Goods	Automotive Logistics Roll-on/Roll-off
Major Autobahns	National Borders	Inland Ports	Freight Villages (*GVZ*)	Ferries and Cruise Ships	Food Products and Animal Feed	Wind Power Stations
Navigable Waterways	Symbol size reflects size of hub	Airports	Location with Inter-modal Terminal (*KV*)	Cellulose and Forest Products	Raw- and Base Materials	Heavy Load Transports/ Ferry/Roll-on/Roll-off/ General Cargo

MMRT Million Metric Revenue Tons (USA), equivalent to 1 million tons (Europe)

TEUs Maritime abbreviation for "20-foot equivalent units", which refers to containers that are 20 feet (6.1 meters) in length

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Supplement
Map of Germany's Seaports & Logistics Regions

Promoted by the Federal Ministry of Economics and Technology and the Federal Government Commissioner for the New Federal States in accordance with a German Parliament resolution.

Welcome

The German seaports play a vital part in the economy as a whole. They are important hubs in international transport chains, securing the necessary links between German industry and global markets. Competition between the seaports ensures high quality and low access costs to international maritime transport.

The German seaports are indispensable for German's export-driven economy. They help to safeguard jobs and boost value creation in this country.

Germany's ports have undoubtedly benefited greatly from globalization, handling a record of 318 million tons in 2008. But the global crisis has hit the seaports harder than the economy as a whole. Recovery is now in progress, and we expect the total handling volume in our seaports to reach about 295 million tons once again in 2011. This confirms that we were right in our assessment of globalization as an irreversible process.

In that record year of 2008, German maritime cargo handling grew so much that it strained transport capacity to and from the ports to the limits. We have to make use of the present breathing space to prepare our seaports for future growth, making sure that they can handle increasing quantities with improved seaward approaches and hinterland connections. We welcome the top-priority status now given by Germany's Federal Government to implement a National Port Concept calling for the expansion and modernization of port approaches and transport infrastructure.

Klaus Heitmann
Managing Director
Association of German Seaport Operators

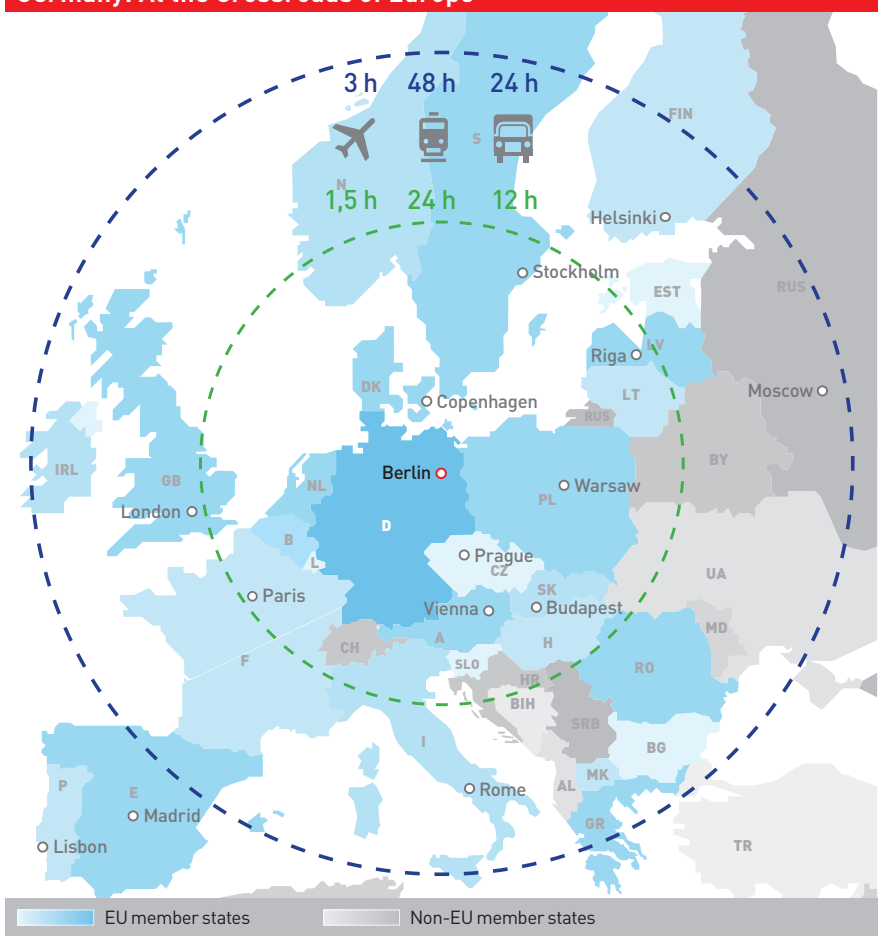
At Europe's Crossroads

Situated at the heart of the European Union, Germany's optimal location is indisputable: over half of the EU population lives within 500 kilometers of Germany's borders; more goods pass through Germany than any other European country, and nearly all of Europe is within three hours flight time or 24 hours by road.

The European Union's eastward expansion has bolstered Germany's top position within the European economy. Trade with its eastern neighbors has grown by leaps and bounds, and Ernst & Young's annual European Attractiveness Survey has asserted time and again that "proximity to customers and suppliers/sources" made Germany the most attractive location for distribution centers serving all of Europe.

No matter what you're trying to move or how you intend to move it, you'll be covered in Germany. Germany has occupied the number one spot in infrastructure in the World Economic Forum's Global Competitiveness Report since 2007. Trade with the United Kingdom, Scandinavia and the Baltic States is facilitated by Germany's large northern ports. Turning westward, 7,467 kilometers of waterways plus an extensive road and rail network link Germany to France and the Benelux nations. A tremendous density of highways and railways – the world's eleventh and sixth most extensive, respectively – ease access to European markets from Portugal to the Black Sea and beyond.

Germany: At the Crossroads of Europe



Note: Geographic Center of EU 27: 42 km east of Frankfurt/Main in Meerholz, Hessen
Sources: Germany Trade & Invest, Financial Times

European Union (EU 27) and Germany (2009)

	EU 27	Germany
Population	500 mn	82 mn
GDP (in EUR)	11.8 tr	2.4 tr
GDP Growth (YoY)	–4.2 %	–5.0 %
Inflation	1.0 %	0.2 %
Unemployment	8.9 %	7.5 %

Source: Eurostat 2010

Europe's Leading Economy

Even through the economic downturn and corresponding slump in global trade, Germany's EUR 2.4 trillion economy remained a bulwark. It is Europe's largest by far, generating about 20% of the EU 27 entire economic output. Germany's affluent 82 million-strong population is Europe's largest consumer market. Its innovation-driven economy is an engine for the rest of the continent – and that engine is now firing on all cylinders.

Now that recovery is on the horizon, Germany is leading the way once again. Figures released in August of 2010 showed that the German economy exceeded even the most optimistic forecasts, boasting quarterly growth of 2.2% – the most robust figures seen since reunification 20 years ago. Strong domestic and foreign demand coupled with dynamic trends in trade and capital formation were all sustainable driving forces in this development.

And as Germany goes, so goes Europe: countries with significant ties to Germany's export machine, such as France and the Netherlands, also posted strong growth.
"It is worth remarking on how strong and self-sustaining the German recovery is starting to look," concluded economists at Credit Suisse in a report released concurrent with quarterly growth figures. German consumer spending and imports should rise, the bank asserted. That "would be positive for the rest of the euro area, including the troubled periphery countries."

Share of Total GDP and Population in the European Union (2009)

	GDP EUR bn	Share of Total GDP (EU 27)	Population in mn	Share of Total Population (EU 27)
Germany	**2,397**	**20 %**	**82**	**16 %**
France	1,907	16 %	64	13 %
UK	1,563	13 %	62	12 %
Spain	1,054	9 %	46	9 %
Netherlands	572	5 %	16	3 %
Poland	310	3 %	38	8 %
Czech Republic	137	1 %	10	2 %
Slovakia	63	1 %	5	1 %
Others	...	...	...	...
EU 27	**11,785**		**500**	
Eurozone	**8,969**		**329**	
USA	10,221		309	
Japan	3,638		128	

Sources: Eurostat 2010, US Census Bureau 2010, Japanese Statistical Bureau 2010

Photo: www.mediaserver.hamburg.de, M. Zapf

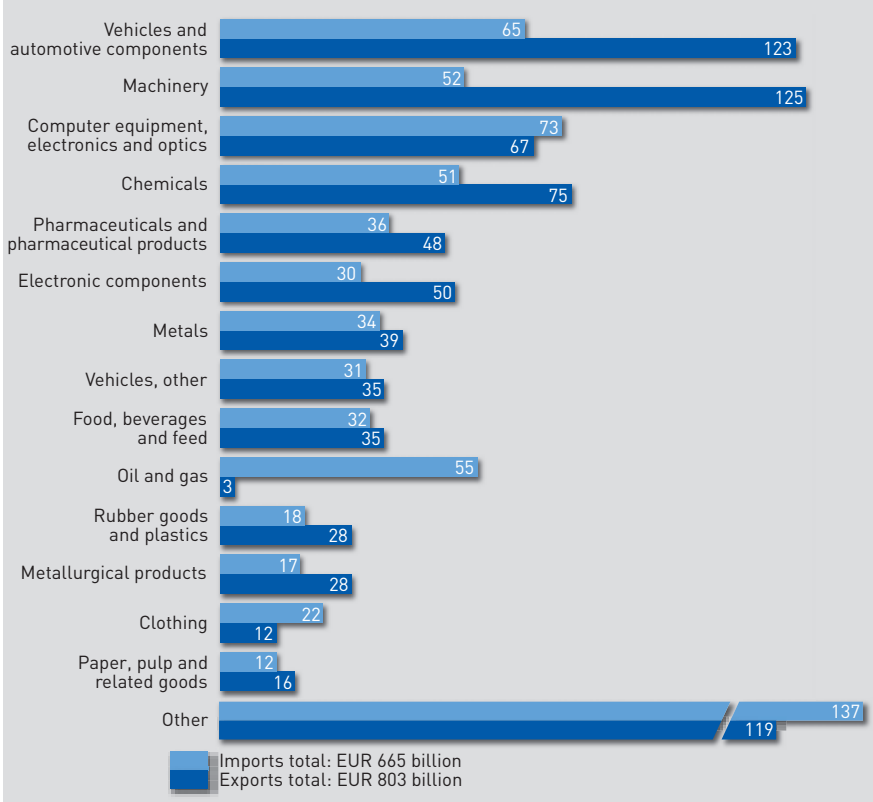
A Global Springboard

As global trade volumes pick up, Germany's preeminence as a major manufacturer is certain to return to its pre-recession heights. German exports are now projected to grow by 11% in 2010 and 8% in 2011 – a rate that would outpace the general growth of trade globally. Additionally, Germany is exceptionally well positioned to capitalize on the upswing due to a raft of governmental reforms designed to jump-start growth and loosen up the labor market.

Germany is among the world's largest and most technologically advanced producers of a wide variety of goods. Unsurprisingly for a nation renowned the world over for precision engineering and top-of-the-line cars, vehicles and machinery accounted for EUR 284 billion out of a total EUR 803 billion in German exports. Other major export industries include chemicals, computer equipment, electronic components and optics, pharmaceuticals and metals.

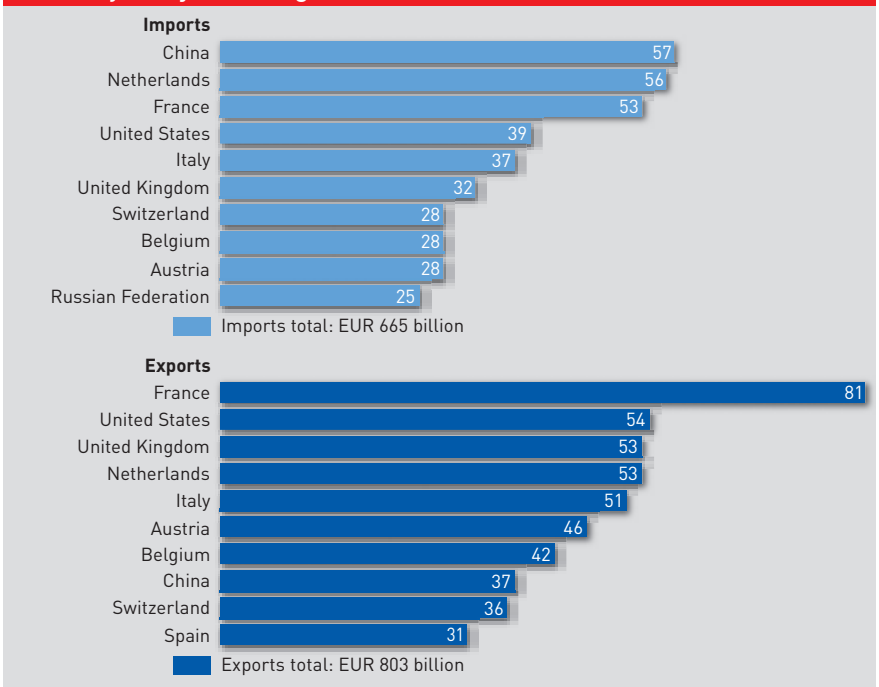
Germany's highest trade flows remain with the EU, China and the U.S. EU nations account for 63% of total German export volume. Imports, accordingly, also derived largely from other EU states including (in descending order of volume) the Netherlands, France, Italy, the UK and Belgium. Outside of Europe, exports to the U.S. are projected to rise by more than 10% this year and next; and China has become the main supplier of goods to Germany, surpassing the Netherlands.

German Foreign Trade
Trade in Goods: Major Exports and Imports (EUR billion/2009*)



** Final statistics* *Source: Federal Statistical Office (Destatis), 2010*

Germany's Major Trading Partners (EUR billion/2009*)

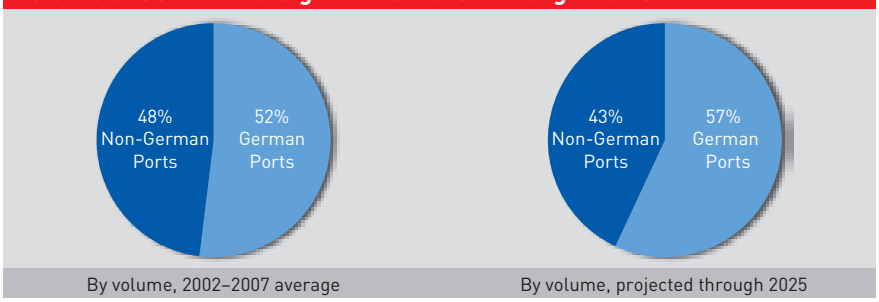


** Final statistics* *Source: Federal Statistical Office (Destatis), 2010*

German Foreign Trade Handled through German Ports

Efficient logistical channels are the arteries of globalization. And maritime transport is its conveyor belt. Over 90% of goods traded worldwide are transported by sea, the most cost-effective means of transportation. The transport of 12 tons of freight from Europe to Asia costs little more than an economy-class commercial flight covering the same distance.

Volume of German Foreign Trade Moved through Ports



Sources: Flottenkomando, Destatis, European Commission, ISL, IHK Nord, Planco (Forecast of Sea Traffic 2025)

Europe's ports alone account for over 57% of global transport volumes. Germany's northern ports boast unique advantages: strong inland infrastructure, a broad spectrum of logistics service providers, and proximity to both source and target markets. Growth prognoses are robust: by 2025, container volume at Germany's ports are projected to exceed 45 million container units annually.

Germany's two giants in the north, Hamburg and Bremen/Bremerhaven, are the backbone of the German shipping industry and account for over 98 % of German container volume. Hamburg is the world's ninth largest and Europe's second largest container port; Bremen's ports rank the fourth in Europe in container volume.

Overall, 52 % of German trade is handled through German ports – a feat indeed, given Germany's status as a perennial export machine as well as a prolific importer of raw and component materials.

Experts forecasting growth rates from 2009 to 2020 favor the Eastern North Range Ports (Hamburg and Bremen/Bremerhaven) over the Western North Range Ports (Rotterdam, Amsterdam, Flushing/Terneuzen, Antwerp, Zeebrugge, Le Havre, Dunkirk, Rouen). The scenario for German ports shows stronger growth rates ranging from 7 % to 5.3 %, whereas the Western North Range Ports' spectrum of expected growth is lower at both ends, with growth rates of 6.5 % to 4.9 %.

Projected Turnover of North Range Ports (OSC) through 2020
Eastern North Range Ports (Hamburg and Bremen/Bremerhaven)

Sources: Institute of Shipping Economics and Logistics, based on OSC (North European Container Port Markets to 2020)

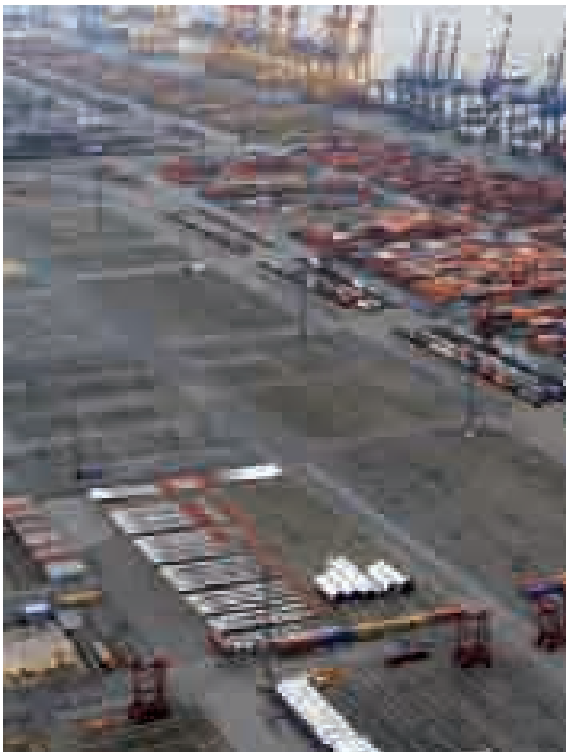
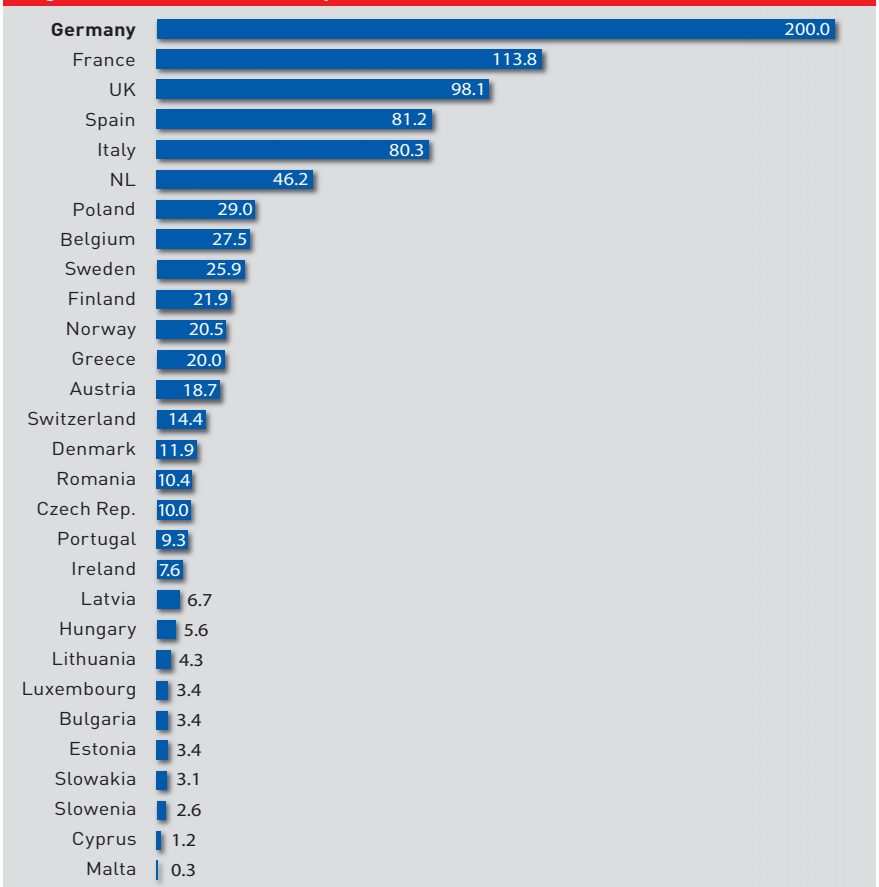


Photo: Bremenports GmbH & Co. KG, Wolfhard Scheer

A Global Logistics Giant

Germany's primacy as the clear leader in European logistics remains unchallenged. With over EUR 200 billion in turnover, Germany far outstrips its closest EU competitors, France and the UK. Germany accounts for just under one quarter of the European logistics market, and roughly equals the turnover of its two closest EU competitors combined.

Logistics Turnover in Europe (EUR billion/2009)



"EU 29*" total: EUR 800 billion

**Note: EU 27 + Norway and Switzerland*

Source: Fraunhofer IIS – Center for Applied Research on Supply Chain Services SCS, 2010

Many factors underscore Germany's dominant position in logistics. Foremost among them is the simple fact of the nation's status as a top exporter and a major trading partner of the other giants of global trade, most notably the U.S. The logistics sector plays a crucial role in facilitating trade flows between the two nations. Germany is also a vital hub between established markets in Europe and manufacturers from further afield, notably Asia, seeking a toehold in these markets.

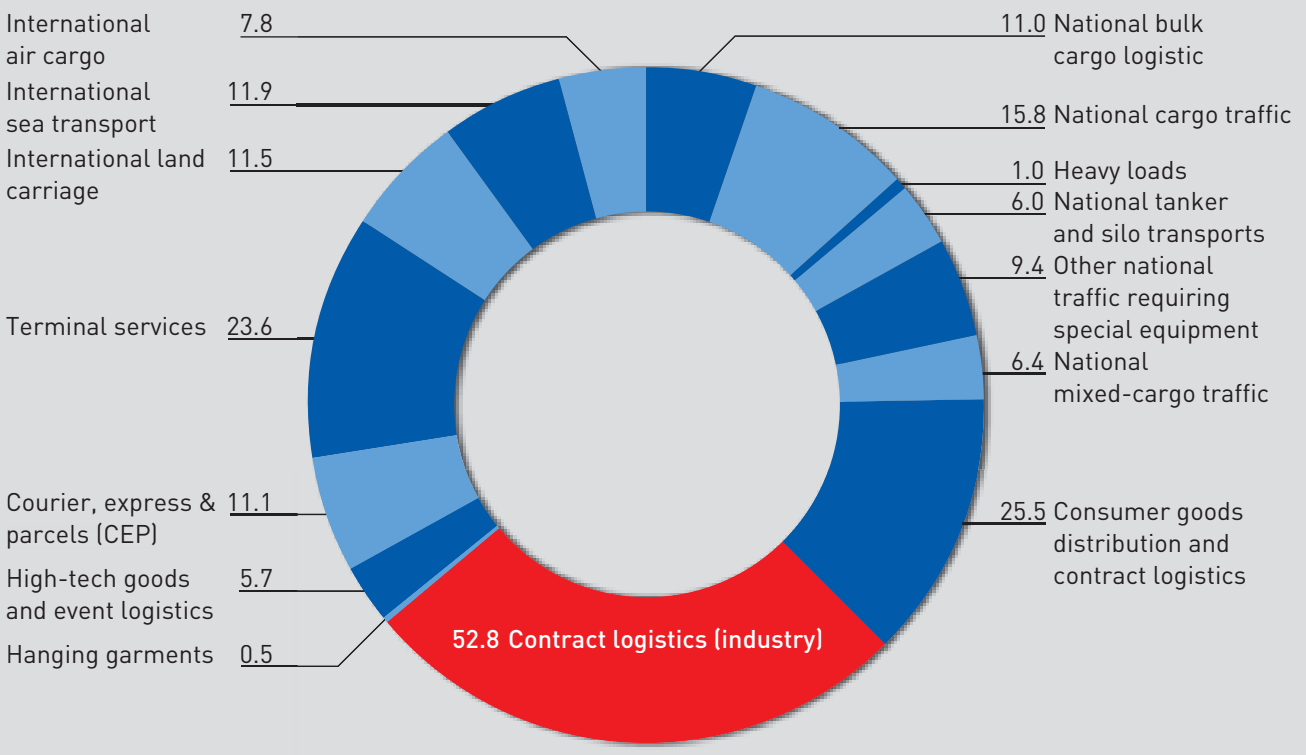
"Economic competitiveness is relentlessly driving countries to strengthen performance, and improving trade logistics is a smart way to deliver more efficiencies, lower costs and added economic growth," said World Bank Group President Robert B. Zoellick, who in a 2010 Berlin address singled Germany out as "the top performer in efficient logistics."

Indeed, the World Bank has conferred the highest ranking on Germany's logistics infrastructure, enumerating several advantageous factors in its 2010 Logistics Performance Index. These include: a robust trade facilitation program that has eliminated performance bottlenecks, and an advanced national logistics policy.

Photo: Niedersachsen Ports GmbH & Co. KG (Emden Seaport)

Logistics Market Segments

Germany's Logistics Market Segments (EUR billion/2009)



Germany total: EUR 200 billion

Source: Fraunhofer IIS – Center for Applied Research on Supply Chain Services SCS, 2010

The logistics industry accounts for about 8 % of Germany's GDP, with 2009 turnover of EUR 200 billion. As trade volumes return and potentially exceed pre-recession levels, growth in the sector is likely to expand. The breakdown of the German logistics market is as follows: transport leads with 44 %, warehousing and freight encompass 25 %, and the remainder is accounted for by processing, administration and supply chain management.

With turnover of EUR 53 billion, contract logistics is by far the industry's single largest segment. Consumer goods distribution, terminal services and national cargo traffic account altogether for another significant chunk of the market. By ton-km, road haulage makes up 70 % of Germany's freight traffic; railways' 17 % share is likely to increase with the completion of three rail freight corridor upgrades. About 10 % of freight moves along Germany's canals and navigable rivers.

Maritime accounts for about 25 % of total turnover in the logistics market. And ports are just a portion of the entire maritime economy. The German shipbuilding and offshore supplier industry is number one in the world measured by export volume. German components – supplied by over 400 shipbuilding and offshore technology firms active in Germany – are the guts of innumerable new container ships traversing the world's waterways, forming the backbone of global maritime goods movement.

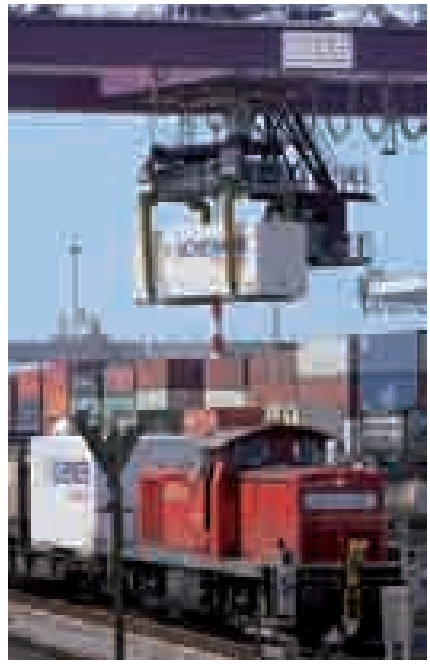
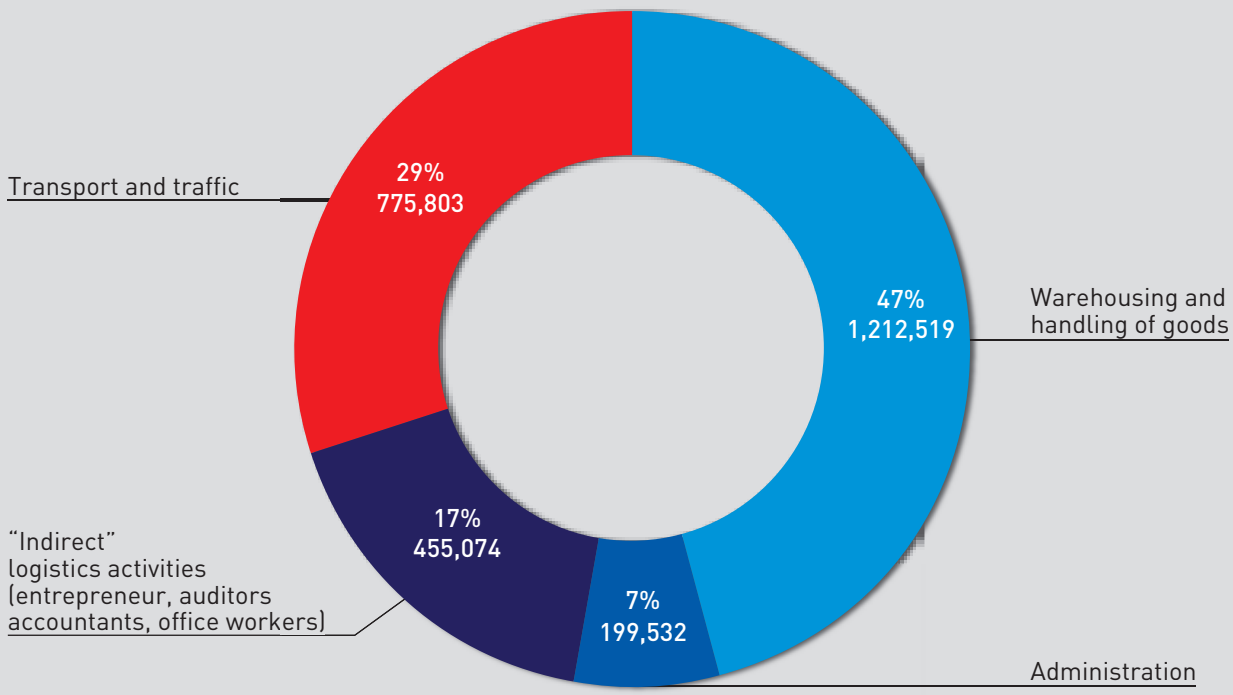


Photo: Duisport

Germany's Logistics Workforce (2.65 million/2009)



Source: Fraunhofer IIS – Center for Applied Research on Supply Chain Services SCS, 2010

Nearly 7% of the German workforce is employed by the 60,000 companies in Germany's logistics sector. That's 2.65 million strong and growing. Analyst forecast that growth in logistics-related employment will be as high as 20 % in the coming decade. Germans are predominate in the European logistics sector, and particularly in the maritime logistics sector, which directly employs approximately 400,000 people. One out of every four jobs in the maritime sector is to be found in Germany.

Germany's highly educated and dedicated workforce is a particular advantage. With a labor force of over 40 million people, Germany boasts the EU's largest pool of ready personnel. 81% of that workforce either holds a university degree or has completed formal vocational training.

By making a commitment to increase investment in education to 7% of GDP by 2015, Germany will continue to produce top-notch talent. Currently, Germany ranks number two in the EU in proportion of students engaged in the sciences, mathematics and engineering. Ninety-five percent of workers in Germany have at least basic foreign language skills, a considerable advantage to companies with international operations.

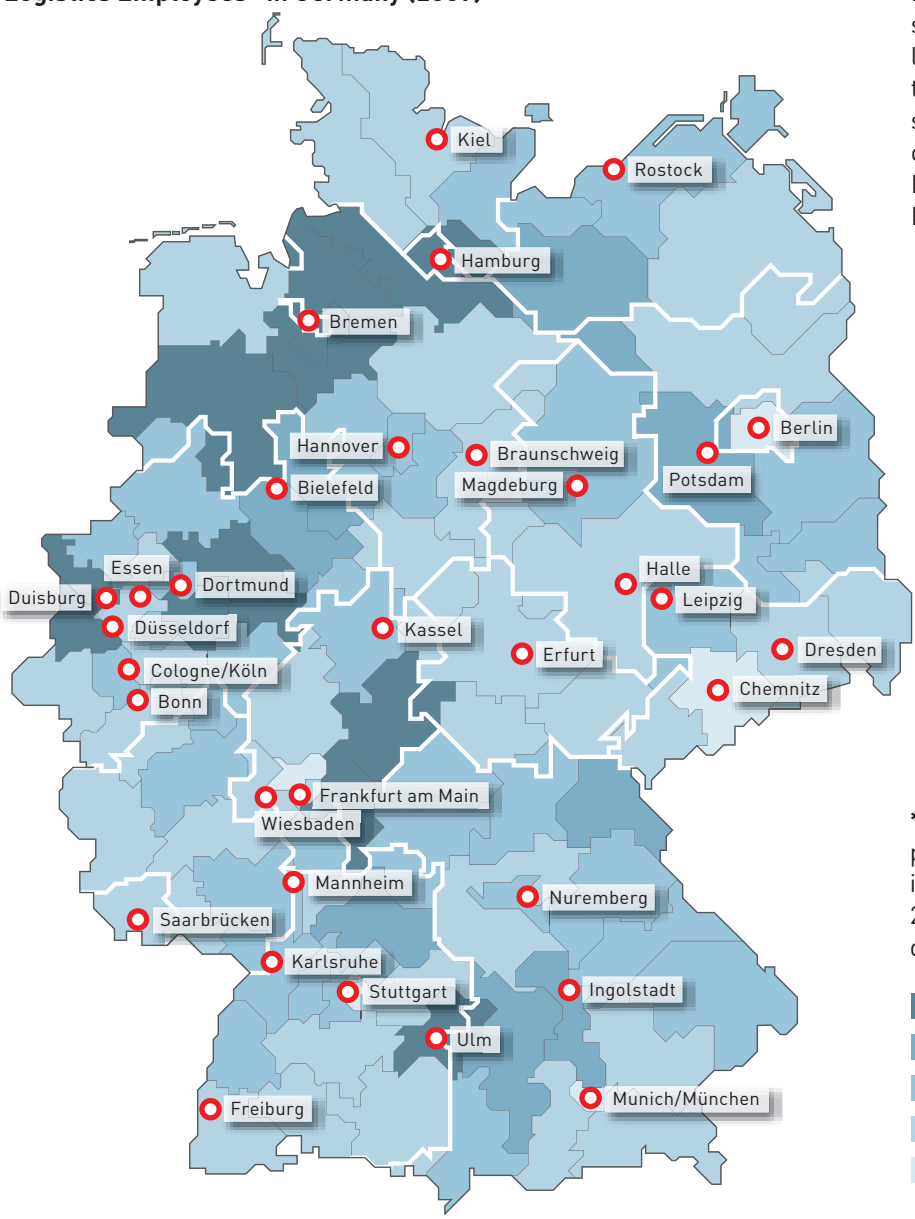
Finally, Germany's labor costs are extremely competitive in an EU-wide comparison. Where wages have risen an average of 3.7% since 2000, unit labor costs in Germany have decreased by an average of 0.2% from 2005 – 2009. Tremendous production efficiency and dedication have led to consistent productivity gains over the past decade.

Logically, Germany's logistics workforce is distributed in a pattern that mirrors the flow of goods from different regions. A concentration of workers runs through the Rhineland and the industrial heartland of the Ruhr to the west, stretching across to the North Sea and Baltic port areas. This corresponds to the high volume of traffic in the Benelux countries and the U.K. in the west, and the rapidly growing traffic flowing to and from Scandinavia, the Baltic States and Russia.

Labor is also concentrated through the Rhine-Ruhr/ North Range area and south into Bavaria and Baden-Württemberg. There, workers handle traffic from France and southwestern Europe in a cluster around Frankfurt/ Main. The southern route to Austria, Switzerland and other points southeast is handled by a cluster of workers in Ulm in the southwest, and in the stretch running from Ingolstadt just south to Munich. Growing trade to the east, meanwhile, is handled south of Berlin in a high-density logistics cluster extending through the state of Brandenburg to the Polish border.

Labor costs in the German logistics sector are very attractive, particularly when productivity increases are taken into account. Q1 2010 statistics show the average annual gross salary of a German logistics worker to be EUR 32,520, compared to the 2007 EU average of EUR 33,116.

Logistics Employees* in Germany (2009)

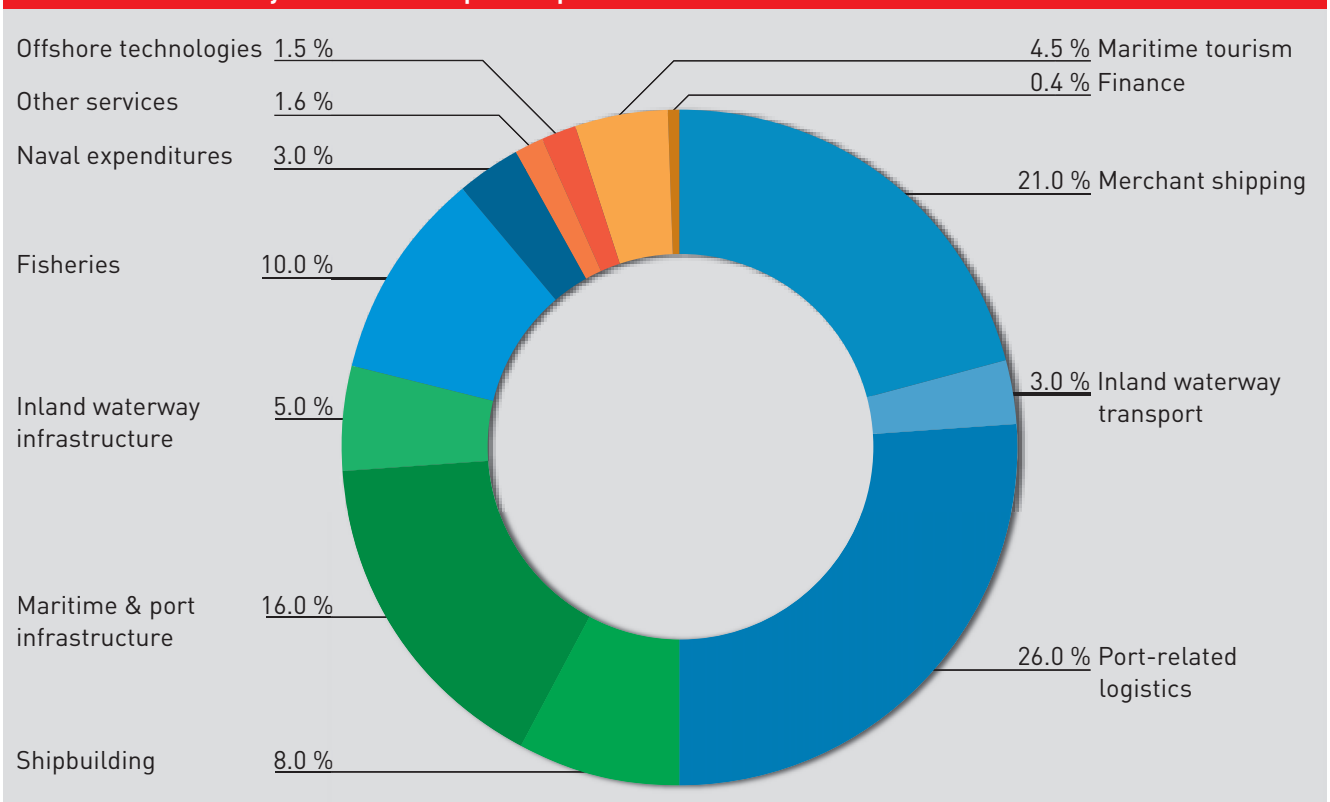


Source: Fraunhofer IIS - Center for Applied Research on Supply Chain Services SCS, 2010

***Employees in Logistics:** percentage liable for national insurance contributions in 2009, according to first two digits of the postal code

- > 9.5%
- ≤ 9.5%
- ≤ 9.0%
- ≤ 8.0%
- ≤ 6.0%

The Maritime Economy: More than Seaport Shipments*



** Maritime economy according to the turnover of its subsegments (2004)*

Sources: IHK Nord 2009, FMC und Balance and ZDS

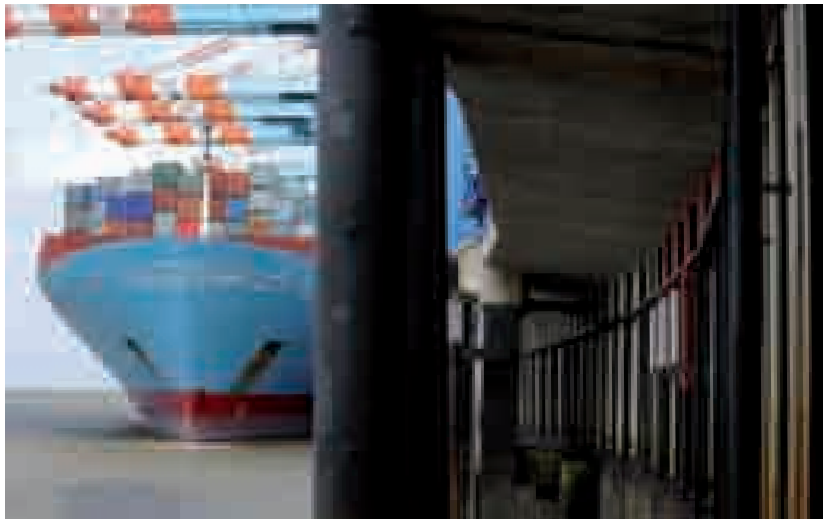
Approximately 400,000 people are directly employed in the maritime industry. Within the industry, the largest sector is the entire merchant shipping sector, which accounts for 60,000 jobs and over EUR 31 billion in turnover in 2006. The second and third-largest sectors are the maritime supplier and shipbuilding industries, which account for EUR 10.5 billion in turnover / 72,000 employees and EUR 6.2 billion / 24,000 employees, respectively. Altogether, the entire industry counts annual turnover of approximately EUR 54 billion.

The growing significance of the German coast is reflected by the market share of German ports as a share of the total turnover of North Range ports. Over the past 15 years, the German North Sea ports have grown at a rate almost double that of the other significant players in the region: namely Antwerp, Rotterdam and Amsterdam. Particularly high potential lies in the dynamic container segment, which in Germany is expected to reach a volume of 45 million container units annually by 2025.

The German land-based logistics segments are projected to expand in concert with the growth in world trade and maritime goods movement. In the wake of expansion in the ports of Hamburg, Bremen/Bremerhaven, Wilhelmshaven, Brunsbüttel, Lübeck and Rostock, freight traffic on the road and railways of Germany are expected to almost triple by 2025 to 304 million tons.

Maritime Cargo Turnover at German Ports

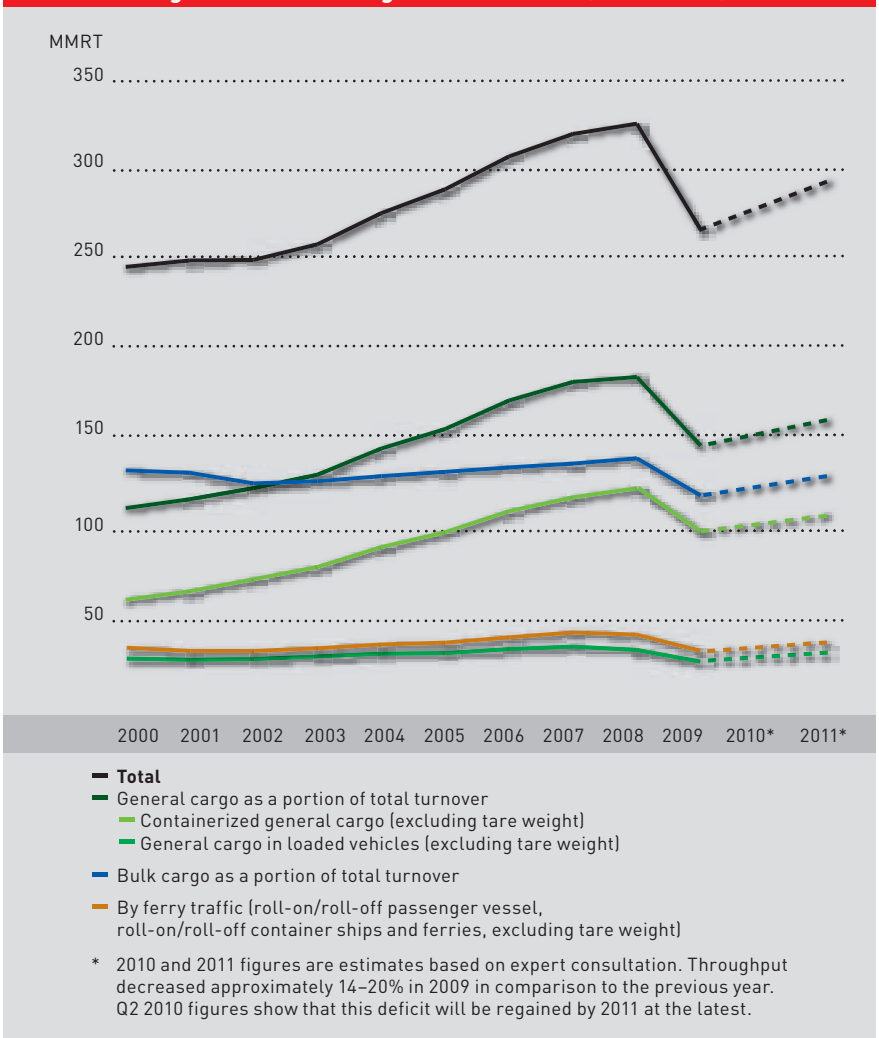
Though ports throughout the world have been challenged by the effects of the dramatic economic slowdown, Germany's ports have been among the first to emerge with strong results across all sectors and maritime regions.



Hamburg, Germany's largest port, has led the way. In the first half of 2010, it capitalized on steadily growing global trade flows with robust 8% growth in total turnover based on a hefty 58.6 million tons in throughput. The port was exceptionally well positioned to absorb the unexpectedly high growth in the bulk and breakbulk sectors. Exceptionally strong developments in imports drove growth of 12.3% on a total tonnage of 33.7 million; export throughput also grew a respectable 2.9% year-on-year with a total tonnage of 24.9 million. Even the especially hard-hit container sector, which weathered a crisis period through 2009, has rebounded to 2010 half-year proportions of 3.7 million twenty-foot equivalent units (TEUs), representing 4.3% growth. Intercontinental transport was another bright spot for Hamburg, with container turnover growing to the Americas, Asia and Africa.

The Lower Saxon ports of Brake, Cuxhaven, Emden, Nordenham and Stade are climbing back to pre-recession levels by relying on their particular niches. A deficit in unrefined and mineral oil products caused by a production stoppage at the Wilhelmshaven refinery was the sole weak spot. Altogether, this group of ports accounted for 22.9 million tons in turnover through the first half of 2010.

Maritime Cargo Turnover through German Ports (2000–2011)



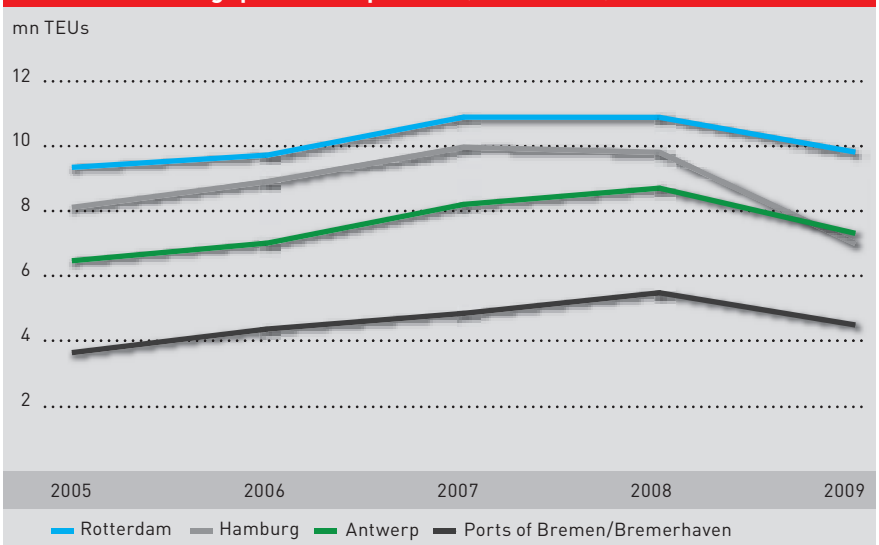
Sources: Federal Statistical Office 2010, www.destatis.de, Germany Trade & Invest

Photo: Bremenports GmbH & Co. KG, Wolfhard Scheer

Europe's Top Four Ports in Comparison

Germany is home to two of the EU's top four ports. Hamburg occupied the number two spot in Europe for years until the global downturn. Given 2010 growth rates, it is increasingly likely that Hamburg will reclaim the number two spot; Bremen/Bremerhaven claims the number four spot. The already superlative German seaport infrastructure will be bolstered by a deep-water port "JadeWeserPort" in Wilhelmshaven that will commence operations in 2012 following a nearly EUR 1 billion investment.

Container Throughput in Comparison (2005–2009)



Source: HPA / HHM, 2010

The Port of Hamburg: Number Two of Europe's Top Four Ports

Photo: Hasenpusch Photo-Productions and Agency

The Ports of Bremen/Bremerhaven: Number Four of Europe's Top Four Ports

Deep-Water Port Wilhelmshaven/JadeWeserPort

Photos: Bremenports; JadeWeserPort/Wilhelmshaven

North Sea

Port of Hamburg
Ports of Bremen/Bremerhaven
Deep-Water Port Wilhelmshaven
Deep-Water Port Wilhelmshaven/JadeWeserPort
Brunsbüttel Seaport
Brake Seaport
Port of Stade
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Nordenham Seaport
Cuxhaven Seaport

Baltic Sea

Port of Lübeck
Rostock Seaport
Port of Kiel
Port of Sassnitz/Mukran
Wismar Seaport

Rhine

Duisburg Inland Port –
The World's Number One Inland Port

Legend

- Major Railways
- Major Autobahns
- Navigable Waterways
- Logistics Regions
- National Borders
- Symbol size reflects size of hub
- Seaports
- Inland Ports
- Airports
- Rail Freight Hubs
- Freight Villages (*GVZ*)
- * Location with Intermodal Terminal (*KV*)

MMRT Million Metric Revenue Tons (USA), equivalent to 1 million tons (Europe)

TEUs Maritime abbreviation for "20-foot equivalent units," which refers to containers that are 20 feet (6.1 meters) in length

Germany boasts a number of superlative ports with the infrastructure to match. While each port has areas of particular specialization, each can handle distribution of almost any product throughout Germany and beyond. German ports have the additional advantage of being home to all the global logistics giants and the EU-wide distribution networks to optimally distribute any product that comes onshore.

Growing trade volumes are placing increasing demands on Germany's ports. Container traffic, in particular, is poised for exceptional growth of at least 11% per annum reaching expected volumes in excess of 77 million TEUs by 2015. This potential can only be fulfilled when the entire infrastructure is built out and ramped up in line with port development. Thus, the significance of Germany's inland ports as multimodal logistics centers continues to grow. The nation's waterways, railways, highways and air traffic are, of necessity, interconnected in order to keep the flow of goods running smoothly.

Germany's ports are each up to the challenges on the horizon. The Weser ports of Brake, Nordenham and Bremen will all make adjustments to accommodate the ships that are now conventional in bulk goods traffic. The port of Emden is securing its ongoing accessibility by readying itself for the most current generation of automotive transporters. The Baltic Sea port of Wismar is seeing necessary improvements to its approach channel.

And operations are set to commence at JadeWeserPort, Germany's first tide-neutral deep-water port in Wilhelmshaven. Germany's unbeatable infrastructural advantages are matched by a general willingness to accept the new reality of 24/7 operations.

Each participant down the transport chain – from the port authorities and governmental bodies to the movers, haulers and cargo handlers – is committed to fulfillment each day of the week at all hours of the day.

Airports

Seaports

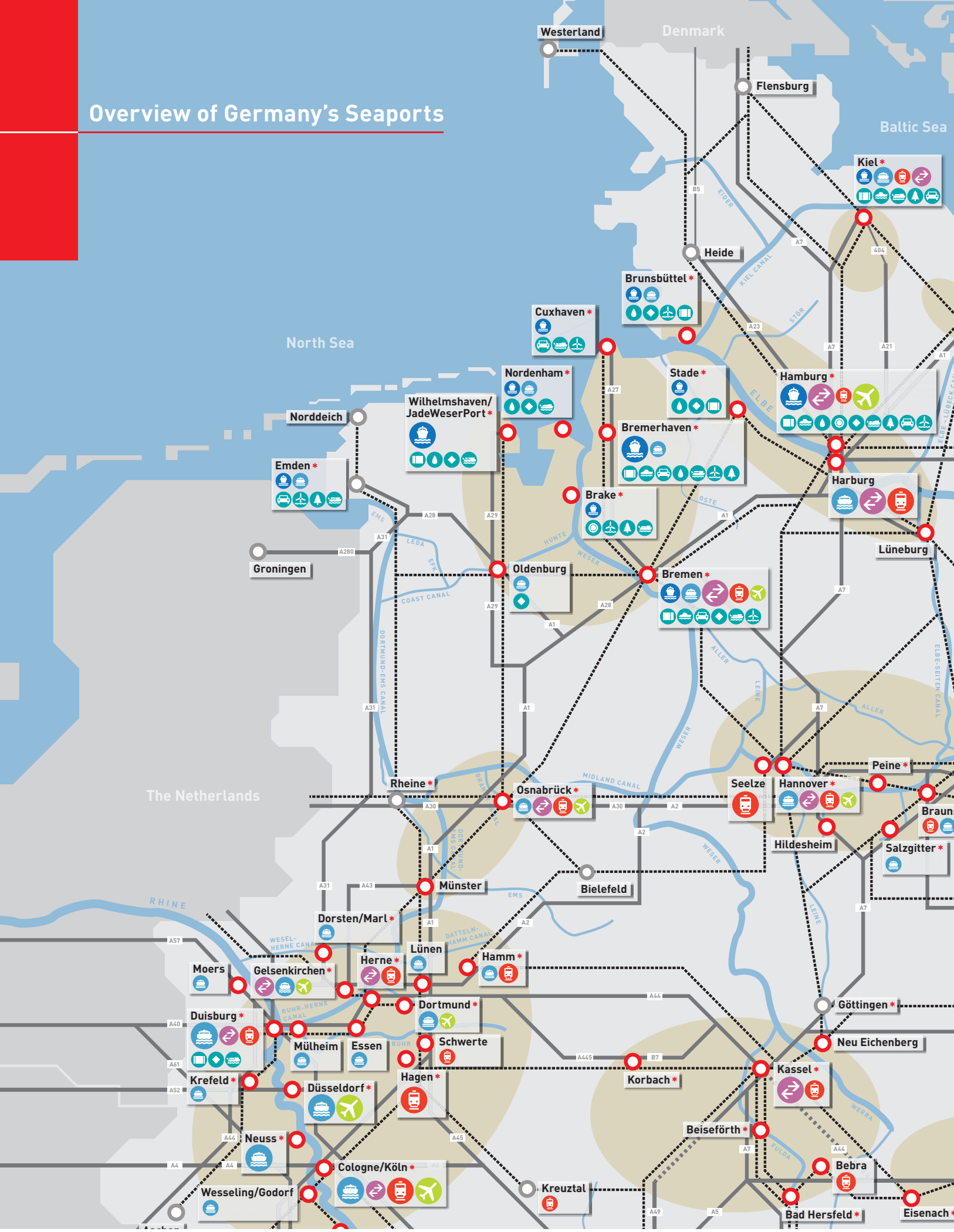
Inland Ports

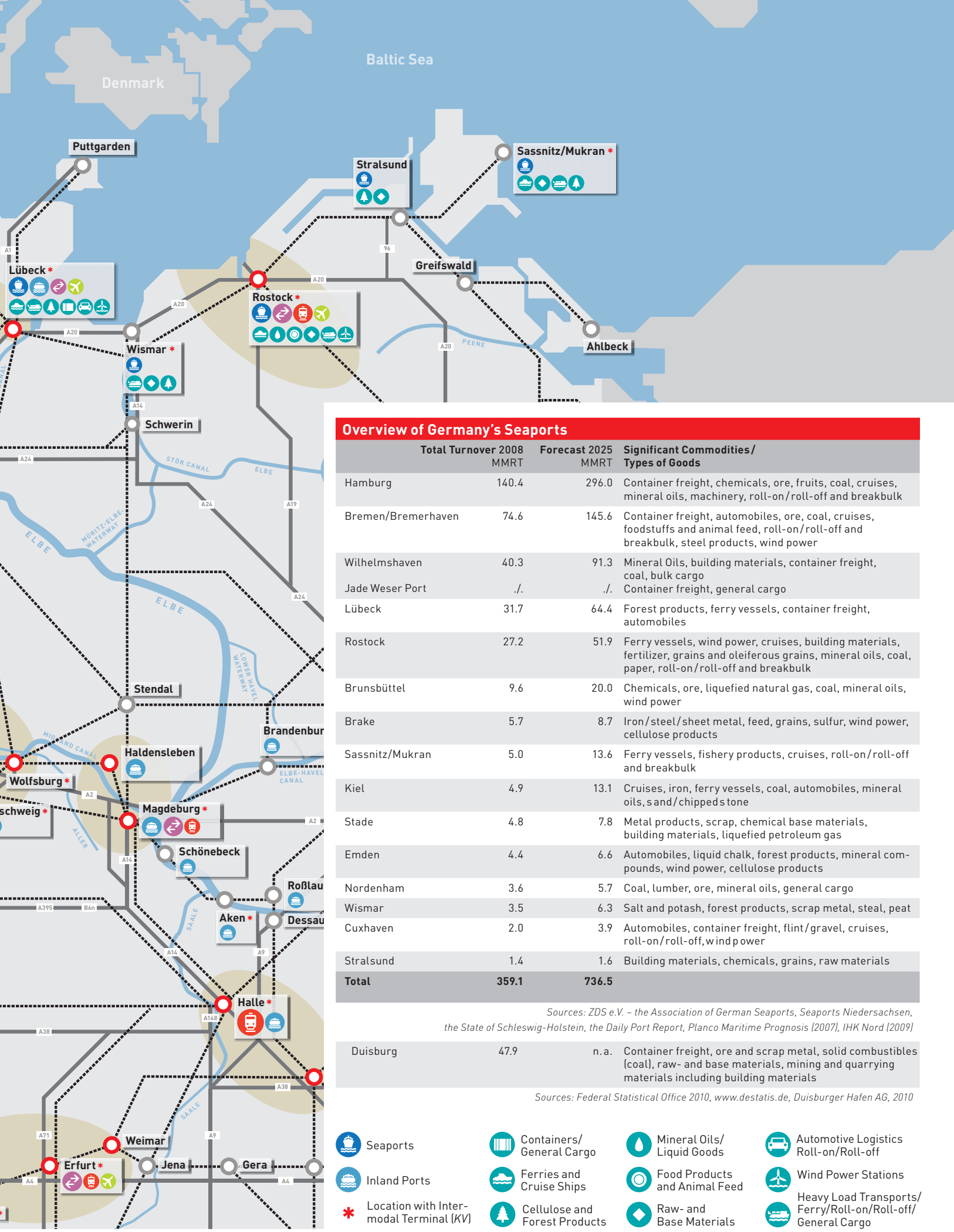
Freight Villages (*GVZ*)

Rail Freight Hubs

* Location with Intermodal Terminal (*KV*)

Overview of Germany's Seaports





Overview of Germany's Seaports

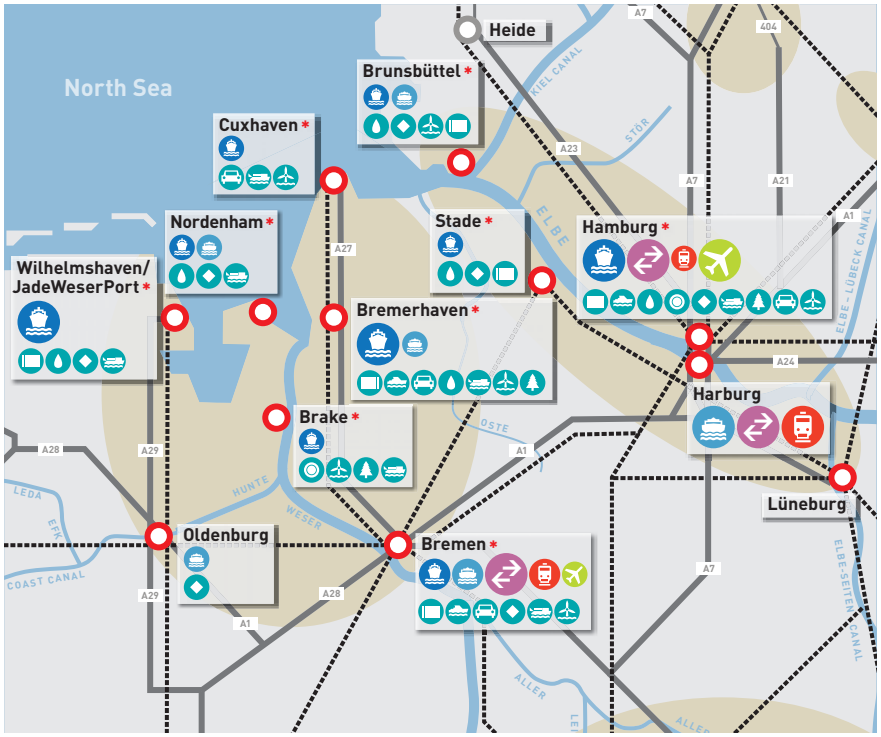
	Total Turnover 2008 MMRT	Forecast 2025 MMRT	Significant Commodities/ Types of Goods
Hamburg	140.4	296.0	Container freight, chemicals, ore, fruits, coal, cruises, mineral oils, machinery, roll-on/roll-off and breakbulk
Bremen/Bremerhaven	74.6	145.6	Container freight, automobiles, ore, coal, cruises, foodstuffs and animal feed, roll-on/roll-off and breakbulk, steel products, wind power
Wilhelmshaven	40.3	91.3	Mineral Oils, building materials, container freight, coal, bulk cargo
Jade Weser Port	./.	./.	Container freight, general cargo
Lübeck	31.7	64.4	Forest products, ferry vessels, container freight, automobiles
Rostock	27.2	51.9	Ferry vessels, wind power, cruises, building materials, fertilizer, grains and oleiferous grains, mineral oils, coal, paper, roll-on/roll-off and breakbulk
Brunsbüttel	9.6	20.0	Chemicals, ore, liquefied natural gas, coal, mineral oils, wind power
Brake	5.7	8.7	Iron/steel/sheet metal, feed, grains, sulfur, wind power, cellulose products
Sassnitz/Mukran	5.0	13.6	Ferry vessels, fishery products, cruises, roll-on/roll-off and breakbulk
Kiel	4.9	13.1	Cruises, iron, ferry vessels, coal, automobiles, mineral oils, sand/chipped stone
Stade	4.8	7.8	Metal products, scrap, chemical base materials, building materials, liquefied petroleum gas
Emden	4.4	6.6	Automobiles, liquid chalk, forest products, mineral compounds, wind power, cellulose products
Nordenham	3.6	5.7	Coal, lumber, ore, mineral oils, general cargo
Wismar	3.5	6.3	Salt and potash, forest products, scrap metal, steal, peat
Cuxhaven	2.0	3.9	Automobiles, container freight, flint/gravel, cruises, roll-on/roll-off, wind power
Stralsund	1.4	1.6	Building materials, chemicals, grains, raw materials
Total	**359.1**	**736.5**	

Sources: ZDS e.V. – the Association of German Seaports, Seaports Niedersachsen, the State of Schleswig-Holstein, the Daily Port Report, Planco Maritime Prognosis (2007), IHK Nord (2009)

Duisburg	47.9	n.a.	Container freight, ore and scrap metal, solid combustibles (coal), raw- and base materials, mining and quarrying materials including building materials

Sources: Federal Statistical Office 2010, www.destatis.de, Duisburger Hafen AG, 2010

- Seaports
- Inland Ports
- * Location with Intermodal Terminal (*KV*)
- Containers/ General Cargo
- Ferries and Cruise Ships
- Cellulose and Forest Products
- Mineral Oils/ Liquid Goods
- Food Products and Animal Feed
- Raw- and Base Materials
- Automotive Logistics Roll-on/Roll-off
- Wind Power Stations
- Heavy Load Transports/ Ferry/Roll-on/Roll-off/ General Cargo



Seaports
Inland Ports
* Location with Intermodal Terminal (*KV*)
Containers/ General Cargo
Ferries and Cruise Ships
Cellulose and Forest Products
Mineral Oils/ Liquid Goods
Food Products and Animal Feed
Raw- and Base Materials
Automotive Logistics Roll-on/Roll-off
Wind Power Stations
Heavy Load Transports/ Ferry/Roll-on/Roll-off/ General Cargo

Transportation Connections and Intermodal Network

Roads
- Public roads in port area: 132 km
- Access to highways A1, connecting the German Rhine/Ruhr area via Hamburg with the Baltic Sea region
- A7, running northwards to Denmark and southwards to Austria
- A24 to Berlin and Poland, and many more

Railways
All terminals are connected to railways, port railway tracks: more than 300 km, rail connections to all major German and European destinations and 220 freight trains daily

Waterways
Seaborne traffic: More than 150 feeder departures per week to ports in the Baltic Sea region and to other European ports

Inland waterways
Inland waterway connections to the Elbe River regions and connection to the German inland waterway network, for general and bulk cargo traffic

Facilities and Services

Ultra-modern Container Terminals
Four efficient container terminals with block train connections to German and European destinations

Flexible Multi-Purpose Terminals
For handling high volumes of rolling cargo and containers as well as crates and totes, heavy lift cargo and other general cargo

High Performing Bulk Cargo Terminals
For handling any kind of bulk cargo, whether it is suction, grab or liquid cargo

Site of the Largest Oil Processor in Germany

Warehousing and Distribution
- Efficient specialized terminals
- Handling and storage capacity for all food and beverage products
- One of the leading ports in Europe for coffee, tea, cocoa, and spices
- Wide variety of reefer and deep freeze warehouses for temperature-sensitive goods like vegetables, fruit, meat, fish, and butter
- Hazardous materials

Attractive Cruise Terminals
- Three berths for luxury liners in HafenCity and Hamburg Altona
- More than 100 calls of cruise ships in 2010 with more than 220,000 passengers

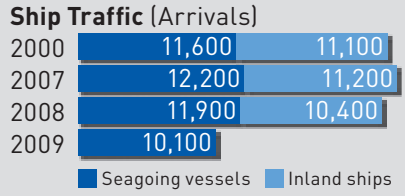
Intermodal Terminals (*KV*)

Port Area and Usage

Total Area	7,200 ha
(accounts for a total of approximately 10% of Hamburg metro area)	
Land	4,200 ha
Water Area	3,000 ha
for Seagoing Vessels	
Quay walls	37.5 km
Number of berths, approx.	320
incl. berths for mega-container and bulk cargo ships	38

Freight Transport and Passenger and Ship Traffic

Ship Traffic (Arrivals)



Source: Port of Hamburg Marketing

Hamburg is Germany's largest universal port and industry and trade center. The global trend toward containerization has led to a tremendous boom at the port – approximately 97% of total general cargo handled at Hamburg is in containers. But Hamburg is far more than just a large-scale container slinger. It's also a central hub for smart logistics geared towards today's global supply chains, servicing a market area of about 447 million consumers.

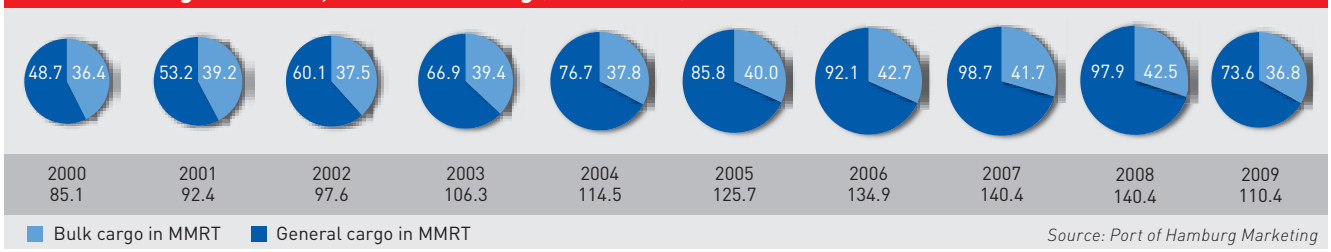
In addition to its function as an overseas port, Hamburg plays an important role as a European hub for feeder traffic in the Baltic Sea region. This growth region, with its 70 million consumers, is optimally connected to the Hanseatic city through the Kiel Canal. Over 150 weekly feeder ship departures make Hamburg the prime location to reach Scandinavia and Finland, Russia, the Baltic States and Poland as well as further-flung locales such as the U.K. and Iceland.

The majority of Hamburg's liner traffic is full-container service, and it's here that the port's advantage in Asian trade shines, regardless of cargo or load type. Hamburg is, for example Europe's leading port for cargo handling with China; every third container handled in Hamburg is coming from or going to China. Of the 36 container services that move goods between northern Europe and Asia, 28 serve the port of Hamburg directly. And numerous general cargo, project and roll-on/roll-off shipping companies run specialized terminals in Hamburg, underscoring the location's universal character.

The logistics landscape in Hamburg and its surrounding metropolitan areas has developed in line with the port. Comprehensive and recent studies by the Fraunhofer Institute for Applied Research and HypoVereinsbank have both declared Hamburg to be Europe's number one location for logistics. Hamburg stands out in comparison with other major European ports for its exceptional infrastructure, very good cargo volumes, its high quality of dispatch, and a wide range of value-added logistics services.

The city's preeminent status in the logistics sector has been punctuated by a number of recent high-profile investments that singled out short transport times as a marquee factor. And to ensure a steady pipeline of new investments, Hamburg cooperates closely with authorities in the surrounding region to secure space for more logistics and infrastructure developments.

Seaborne Cargo Turnover, Port of Hamburg (2000–2009)



Source: Port of Hamburg Marketing

Photos: Port of Hamburg Marketing

Port of Hamburg: Hinterland Connections within Europe

Corresponding with its status as a multimodal logistics hub, Hamburg is optimally connected to locations throughout Germany, Europe and beyond through all major transport modes. Each year, over 10,000 seagoing vessels dock at the port of Hamburg. Many service the port on the Elbe in regular routes connecting Hamburg with six continents throughout the world: some 920 destinations in 177 countries are served via Hamburg.

The spectrum of services encompasses containers and other general cargo to bulk cargo, project and heavy cargo loading, and roll-on/roll-off goods. Thus, shipping and forwarding agents have the flexibility to reach pretty much any location in the world from Hamburg regardless of cargo or load type.

On the Rails

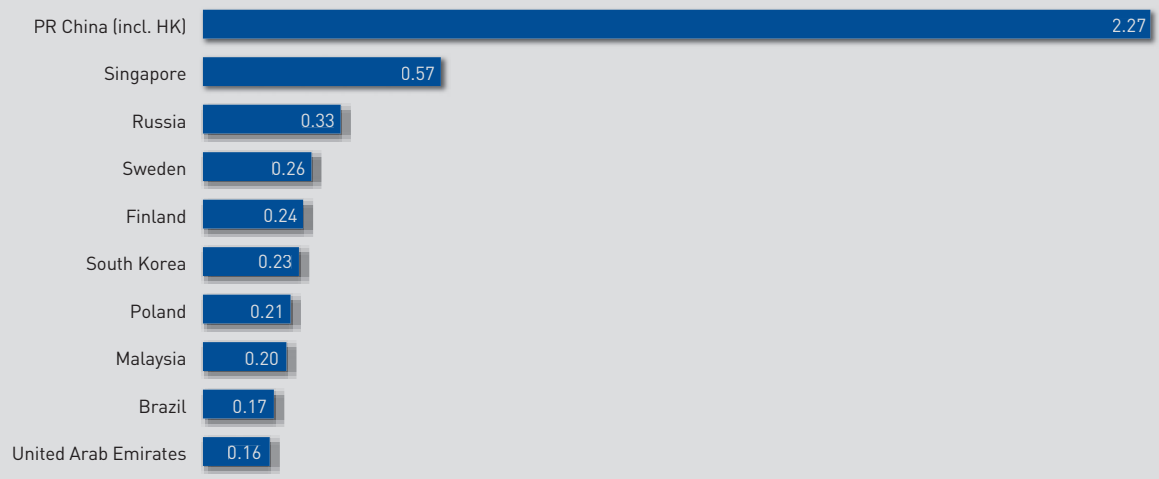
Hamburg is Europe's leading railroad port. Railways are the most important means of transporting goods from Hamburg. More than 220 daily freight trains with over 4,300 wagons are fulfilled through Hamburg's port rail system. Around 80 rail operators make use of the port of Hamburg's 330 km-long network of tracks. They offer a tight web of block train connections throughout the entire German and European market. Over 12% of German rail freight begins or terminates from the port of Hamburg and the prognosis is for growth to over 400 freight trains daily by 2015.

Inland waterways
Germany's largest seaport is also its third largest inland port. Regular routes throughout the Elbe region are growing. Several suppliers offer regular liner services via inland waterway vessel to Berlin, Hannover, Dortmund, Dresden and many more destinations.

Inland ships have an important role to play in the transport of goods within the port of Hamburg as well. They offer an environmentally friendly way to transport general cargo as containers as well as mineral oil products and dry bulk goods like coal and ore.

On the Roads
Truck transport is the obvious choice when flexibility in the distribution of goods is the top factor. The 1,700+ firms represented in Hamburg offer all manner of road transport services from containers to combined shipments to refrigerated goods and heavy-load cargo. This is due to the density of the highway network surrounding the Hanseatic city and offering fast connections to all German and European directions.

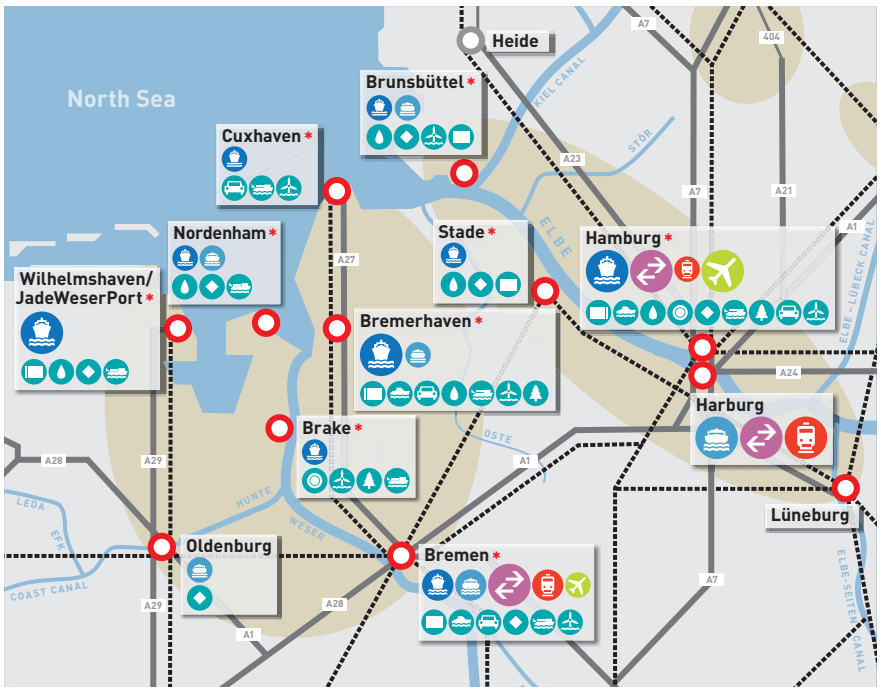
Port of Hamburg's Top Ten Trading Partners (mn TEUs/2009)



Total: TEU 4.78 million

Source: Port of Hamburg Marketing

Photo: Port of Hamburg Marketing



Seaports
Inland Ports
* Location with Inter-modal Terminal (*KV*)
Containers/ General Cargo
Ferries and Cruise Ships
Cellulose and Forest Products
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Wind Power Stations
Heavy Load Transports/ Ferry/Roll-on/Roll-off/ General Cargo

Transportation Connections and Intermodal Network

Roads
Public roads on port grounds. Connection to highways A1 and A27 in Bremen, and to highway A27 in Bremerhaven

Railways
Ca. 272 km port-specific rail network, rail connections to all major German and European destinations

Inland waterways
Two major connections to the German inland waterway network: access to westerly destinations via the Unterweser and Hunte rivers, the Coastal Canal, and the Dortmund-Ems Canal to the Rhein River; access to southerly destinations via the Mittelweser river to the Mittelland canal to points including Minden, Hannover and Braunschweig

Facilities and Services

Handling of containers, including a wide service offering pertaining to containers, including pre- and post-container handling services offered by port subsidiary providers as well as third-party services providers

- Eight terminals, 51 gantry cranes
- Five tank terminals with storage and handling facilities for mineral oil, biodiesel, molasses
- Three telescoping passenger bridges
- Seven cranes with capacity of 4–8 t; two floater cranes with capacity of 100 t per crane, one mobile port crane with 104 t capacity
- One roll-on/roll-off ramp, class SLW 60 (60 t capacity)
- Milling facility and production of Pilsner malt

Turnover of
- Vehicles (incl. up- and down-stream services)
- Uncontainerized general cargo and roll-on/roll-off loads
- Special cargo, machinery, iron, steel and other metals
- Tropical fruit (incl. storage), heavy goods
- Bulk cargo incl. dry bulk such as ore, coal and coke
- Fertilizer, liquid cargo incl. crude oil and mineral oil products
- Grains, oilseeds, feed

Storage of
- Food (including specialty foods) such as coffee, cacao, tea, tobacco, spices and other natural products
- Contract logistics, distribution and containerization

City of Bremen
- Wood and factory grounds 2.2 km
- Grain terminal 1.0 km
- Shipyard 10.5 m
- Cape Horn Port 0.39 km
- Neustädter Port with roll-on/roll-off facilities 2.6 km
- Hohentor Port 0.4 km
- Mittelsbürener Port 0.3 km
- Automobile Terminal 0.3 km and 0.2 km
- Wese Port Hemelingen, access only for inland ships and smaller vessels 2.6 km
- Industrial port 4.1 km

Bremerhaven – Overseas Ports
- Columbus Quay 1.1 km
- Strom Quay 4.9 km
- Motor Car Terminal (Kaiser Port II–III , North and East Port) 3.0 km
- North Port 0.9 km

The twin ports of Bremen/Bremerhaven have multiple calling cards: They are one of Europe's leading automobile hubs. It's also Europe's largest refrigerated warehouse, Europe's fourth-largest container terminal, one of Germany's most historic and bucolic cruise destinations, and a major processor of fishery products.

The universal ports offer a comprehensive bundle of services. Bremerhaven, which is situated only 32 nautical miles from the open sea, is a container, car carrier and refrigerated cargo specialist. Bremen's many terminals, located 60 km further south, focus on heavy-lift cargo and bulk commodities.

The ports handle huge quantities of containers, automobiles, general and bulk cargo. Additionally, the ports are more than a site for on- and offloading of goods. Countless specialized facilities for processing and finishing are located on port grounds to handle goods as varied as vehicles of all kinds, exotic fruit, and fish.

Bremen/Bremerhaven is also a formidable hub for project logistics, and can handle facets of manner of major industrial project from wind farms, industrial plants to pipeline construction. Large terminal areas, special equipment for handling massive components weighing up to 550 tons and the necessary expertise make up the port's project logistics offering.

Facilities and Services

- East Port 1.2 km
- Connecting Port 1.7 km (Automobile, Fruits and Tank Terminal)
- Kaiserhafen Port I–III 4.6 km
- Inner Harbor 7.0 km (Trade Port, Fisheries Port I–II, Luneort Port, Labrador Port)

Other

Bremen is Europe's largest garage. It not only handles 500,000 vehicles annually, but also is the place where up to 2 million cars are loaded and unloaded each year. Storage for 120,000 vehicles, including 45,000 covered parking spaces. Roll-on/roll-off handling of buses, combine harvesters, rail vehicles, etc.

Bremerhaven's Storage Facilities

Container Terminal:
- Open storage 3 million m²
- Covered storage 30,000 m²
- Cold storage 8,000 m²

Deep-freeze capacity, fisheries port:
- Commercial space* 162,000 m³
- Operational space 336,000 m³

(*Only spaces >2,000 m³ are accounted for. Figures as of September 2006)

Vehicle Terminal:
- Total space 963,000 m²
- Incl. covered storage 360,000 m²

North Port:
- Open storage 470,000 m²

Fruit Terminal
- Total area 26,000 m²
- Incl. covered storage 13,000 m²
- And cold storage 2,500 m²

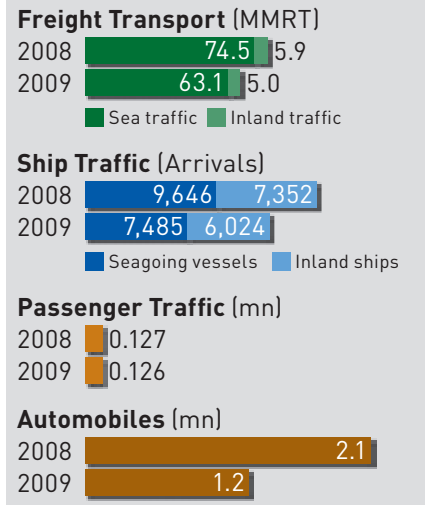
Oil Terminal
- Storage capacity 100,000 m³

Passenger/General Cargo/Fruit Terminal (Columbus Quay)
- Open storage space 68,000 m²
- Cold storage 28,000 m²

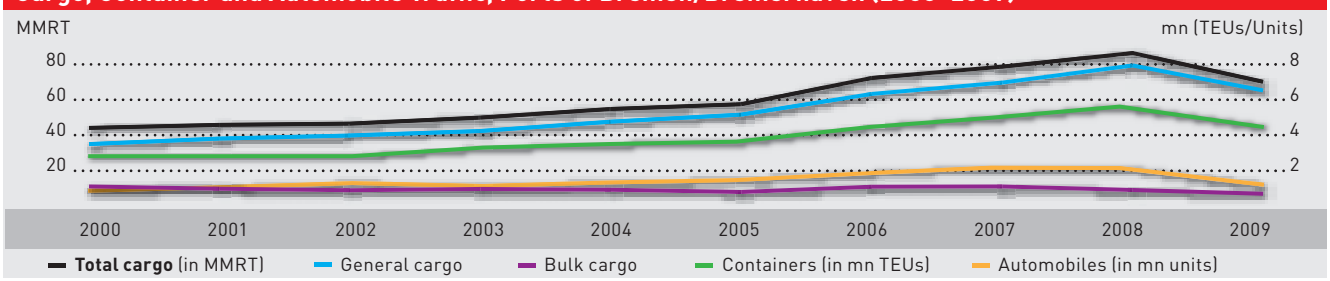
Port Area and Usage

Total Area	3,276 ha
(City of Bremen and Bremenhaven)	
Land	2,726 ha
Water Area	550 ha
for Seagoing Vessels	
Quay walls	36 km

Freight Transport and Passenger and Ship Traffic



Cargo, Container and Automobile Traffic, Ports of Bremen/Bremerhaven (2000–2009)



Sources: Bremenports GmbH & Co. KG, author's illustration

Each year, some 5.5 million standard containers arrive or depart from Bremerhaven. The port's five kilometer-long container quay offers 14 berths for mega-container vessels.

With the port's latest completed expansion – Container Terminal 4 – Bremerhaven's annual container handling capacity has reached 8 million TEUs. The container terminal is equipped to handle even the largest 398-meter, 14,000 TEU container ships. It is currently the only port in Germany capable of accommodating ships of this size. Additionally, the EUR 223 million expansion of the Kaiserschleuse lock is slated for completion in 2011.

With that, Bremerhaven will be able to accommodate "Panamax" size car carriers with a passage width enlarged from 28 meters to 55 meters and state-of-the-art sliding gates.

An established and efficient network of logistics service providers, including many container logistics specialists, are on-site at the port to offer all manner of cargo solutions. Logistics support is available in the guise of several portside firms, each specializing in a specific cargo type from heavy lift and perishables to procurement and distribution of high-quality steel to the transshipment, storage and distribution of coffee, cocoa, feeds and grains.

Ports of Bremen/Bremerhaven: Hinterland Connections within Europe

Sources: Bremenports GmbH & Co. KG, author's illustration

Maritime Traffic and Destinations, Bremen/Bremerhaven (Shipping and Receiving/2009)	
Continents and Countries	**thousands of tons**
Europe	**29,720**
Russian Federation	4,786
Norway	3,776
Poland	2,663
Sweden	2,327
Finland	2,285
Netherlands	2,014
Germany	1,466
Asia	**16,615**
Far East	12,129
Arabian Peninsula and Persian Gulf	2,727
Americas	**13,739**
North America, Atlantic	7,166
Gulf of Mexico, Caribbean	3,225
South America, Atlantic	1,632
Africa	**2,836**
South Africa	1,182
North Africa, Mediterranean	0,974
Australia and Oceania	**0,186**
...	...
Total	**63,096**

Source: Bremenports GmbH & Co. KG

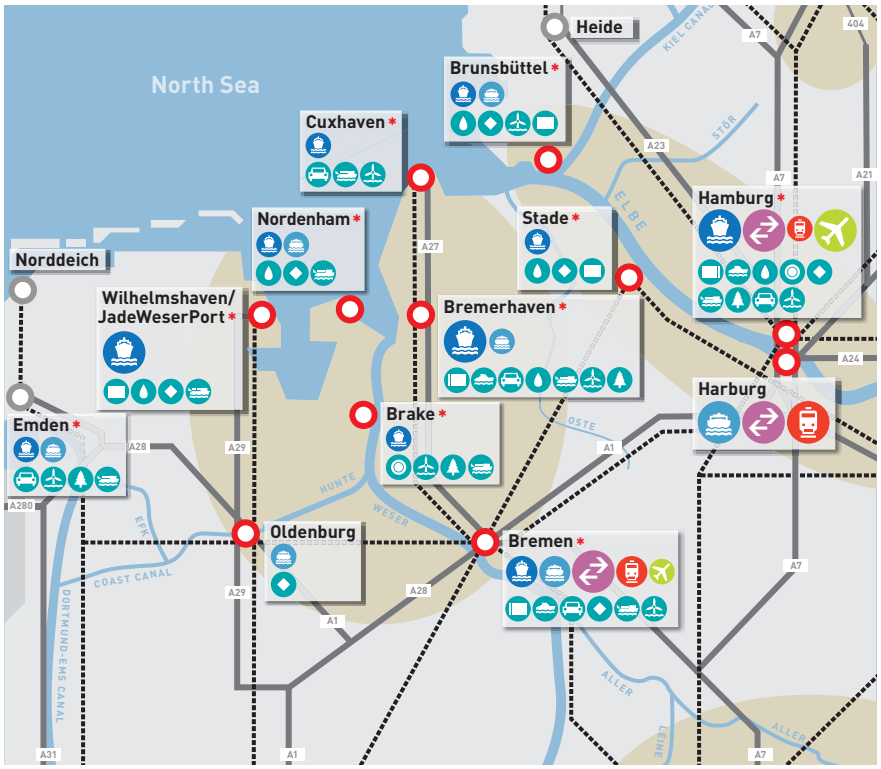
Bremen/Bremerhaven handle some 10 million tons of bulk cargo of all sorts, and can deal with even the heaviest cargo in mass quantity with its 100-ton roll-on/roll-off ramp, 104-ton mobile crane and three 650-ton capacity floating cranes. It is also a center for reefer cargo, with controlled temperature storage for 20,000 pallets, cold storage for an additional 30,000 pallets of refrigerated and deep-frozen goods for import/export and 4,500 pallets for deep-frozen products.

Bremerhaven is a leading automobile hub. It is able to handle over 2 million units per year and boasts capacity for 90,000 vehicles at any one time. The port features storage space for 120,000 cars (45,000 covered) and 15 berths for deep- and short-sea carriers. Buses, specialized machinery, oversized construction equipment and even entire commuter trains are dispatched worldwide from the Überseehafen terminal. 520 dedicated, technically skilled employees keep the port's 300,000 m^2 technical center busy, ensuring that every year, over 500,000 cars are fitted with all the finishing touches necessary for the market.

Almost any destination is accessible through Bremen, either directly or via transshipment. This goes not only for the major shipping routes between Europe, the Far East and North and South America, but also for niche areas like the South Seas, the Caspian Sea and East Africa.

Photo: Bremenports GmbH & Co. KG, Wolfhard Scheer

Deep-Water Port Wilhelmshaven



Seaports
Inland Ports
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Automotive Logistics Roll-on/Roll-off
Wind Power Stations
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Transportation Connections and Intermodal Network

Roads
Direct connection to the A29 highway

Railways
Direct connection to Deutsche Bahn AG rail network from all areas of port facility

Waterways
Deep-water port

Facilities and Services

Turnover of
Bulk cargo – crude oil and mineral oil products (gasoline, diesel fuel, heating oil, etc.).

Chemical products (ethylene, VCM, EDC), coal, special cargo, building materials, fertilizer, scrap, refrigerated cargo.

Notes
With the quantity of coal turned over at Wilhelmshaven, the port is Germany's major energy hub; it is also the largest intake port for crude oil.

Approximately 1,000 ha of industrial space is available for port expansion.

Numerous ramps are available for roll-on/roll-off cargo loading
- Four roll-on/roll-off ramps
- Three mobile cranes/ multipurpose cranes with capacity up to 100 t
- Two swing and slewing cranes
- Rail connections
- Three discharge heads, capacity max. 40,000 m³/h
- One 32/40 t ship offloader for bulk and general cargo

Storage Space

- Storage space,	ca. 430,000 m²
incl. open storage	340,000 m²
- Covered storage	20,000 m²
- Cold storage space	6,000 m²
- Warehouse space	10,000 m²
- Tank storage capacity	2.9 mn m³

Port Area and Usage

Total Area	1,323 ha
Land	1,092 ha
Water Area	231 ha
for Seagoing Vessels	
Quay walls	11 km
Number of berths	30
for large cargo liners (200 m)	16

Freight Transport and Passenger and Ship Traffic

Freight Transport (MMRT)

2008	40.3
2009	33.6

Ship Traffic (Arrivals)

2008	1,372
2009	1,177

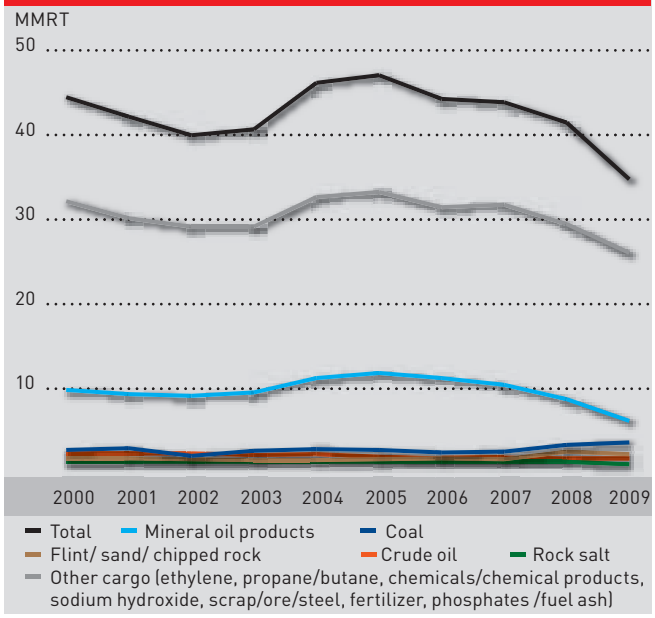
Depth and energy are currently Wilhelmshaven's two calling cards. Germany's third largest port by turnover is characterized by the depth of its navigable channels, and by the important role it plays in the German energy landscape.

The port's advantageous placement offers tide-neutral depth to accommodate ships of all sizes, handle bulk and general cargo of all kinds as well as container traffic. Germany's first deep-water container terminal, JadeWeserPort (adjacent to Wilhelmshaven) is under development and will offer capacity to handle even the largest container ships of 18,000+ TEUs.

Wilhelmshaven is Germany's largest import point for crude oil, and a significant hub for the turnover of mineral oil products, coal and chemicals. In 2009 alone, over 2.2 million tons of coal were imported at Wilhelmshaven. In order to accommodate increasing volumes of coal and related products, the port's turnover facility is slated to expand capacity to over 6 million tons per year.

Building materials, fertilizer, reefer cargo, special cargo and roll-on/roll-off loads are all handled at the inner port at Wilhelmshaven. Additionally, the development of offshore wind parks in the nearby bay represent a future area of growth for the port.

Cargo Handling at the Deep-Water Port Wilhelmshaven (2000 – 2009)



Sources: Niedersachsen Ports GmbH & Co. KG, 2010; author's illustration

Regular Traffic at the Deep-Water Port Wilhelmshaven

Sources: Niedersachsen Ports GmbH & Co. KG, 2010; author's illustration

Photo: Niedersachsen Ports GmbH & Co. KG

Deep-Water Port Wilhelmshaven/JadeWeserPort

Seaports
Inland Ports
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Containers/ General Cargo
Ferries and Cruise Ships
Cellulose and Forest Products
Mineral Oils/ Liquid Goods
Food Products and Animal Feed
Raw- and Base Materials
Automotive Logistics Roll-on/Roll-off
Wind Power Stations
Heavy Load Transports/ Ferry/Roll-on/Roll-off/ General Cargo

Transportation Connections and Intermodal Network

Roads
Direct connection to the A29 highway

Railways
Direct connection to Deutsche Bahn AG rail network from all areas of port facility

Waterways
Deep-water port

Facilities and Services

Turnover of
Containers

Facts and Figures
- Short approach: 23 nautical miles
- Accessible for ships with a draught of up to 16.5 m regardless of tide levels
- Accessible to container ships of up to 430 m in length
- 700 m turning basin
- Most easterly of the European North Range deep sea ports
- Terminal depth: 650 m
- Water depth (below sea chart zero): 18 m
- Container bridges: 16
- Van carriers: 68
- Eight heavy forklift trucks
- Annual container handling capacity of approx. 2.7 mn TEUs

Storage Space
- Container handling area 130 ha
- Logistic, industrial and commercial area 160 ha

By August 2012
Annual container handling capacity of approximately 2.7 mn TEUs

Timeline
March 2006: Terminal operator concession granted

March 2008: Start of construction of terminal infrastructure

August 2012: Target date for commencement of operations

Total Investment
Approximately EUR 1 billion

Port Area and Usage

Total Area	360 ha
for Seagoing Vessels	
Quay walls	1.725 km
Number of berths for large cargo liners (430 m)	4

Information

Deep-Water Port Wilhelmshaven / JadeWeserPort
commences operations in August 2012

The contours of Germany's first tide-neutral deep sea container port are beginning to emerge from what is now the country's largest waterborne construction site. JadeWeserPort will be a significant addition to the existing port at Wilhelmshaven.

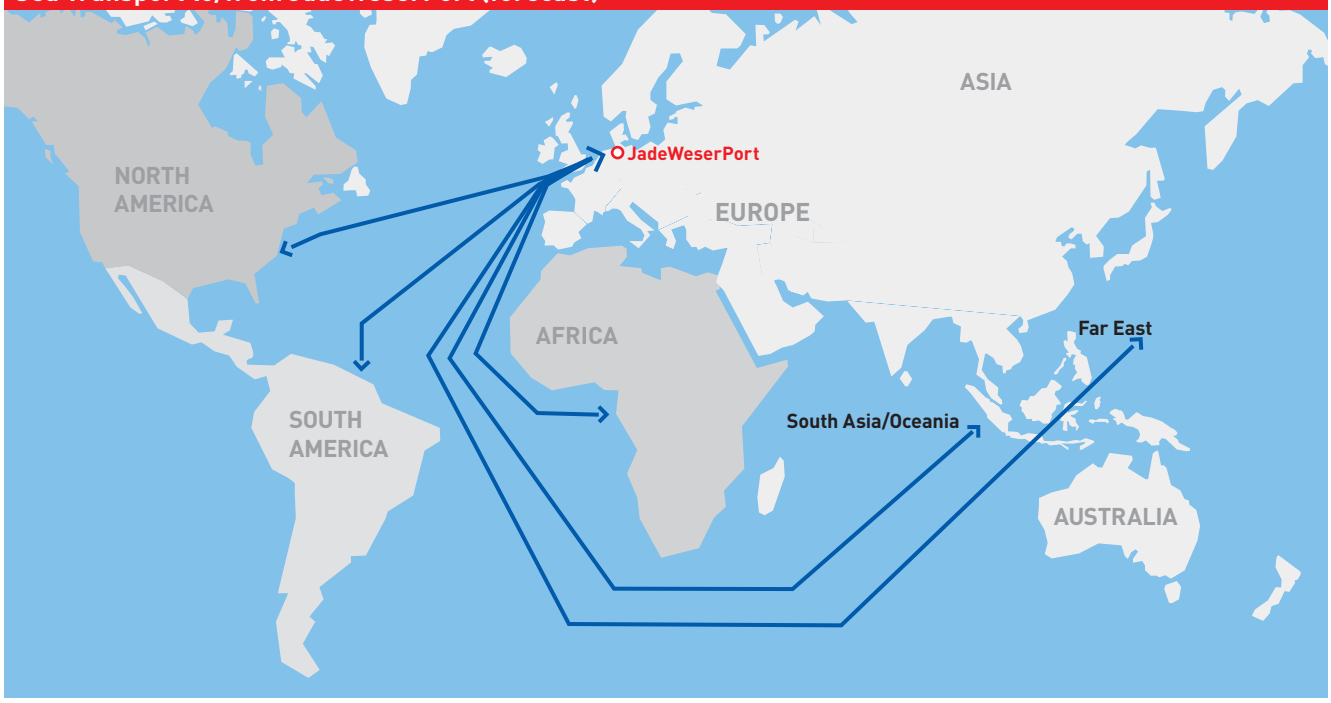
JadeWeserPort's 1,725 meter container terminal will add capacity for 2.7 million TEUs in container turnover, 130 hectares of terminal space, four berths and 16 container bridges on a site with at least 18 meters of clearance even at low tide. The largest and most modern of container carriers will be able to load and unload at JadeWeserPort.

This capacity will establish the port as an important transshipment hub for container traffic between Europe and Asia, and for feeder traffic to northern Europe, Russia, Scandinavia and the Baltics.

The port will also serve as a hub for combined transport, with excellent rail and road links, plus a 160-hectare logistics service center and a freight village. The port's six rail tracks and five rail-loading cranes will be fronted by a 16-track marshalling yard linking the port to points throughout Europe. Additionally, the A29 highway terminates right outside the port development – trucks can run straight from the highway to the port without ever encountering a traffic light.

Construction to be completed by mid-2013 will allow ships with a draught of 16.5 meters access to the existing port at Wilhelmshaven. Operations are slated to commence with the 1,000 m quay in August 2012.

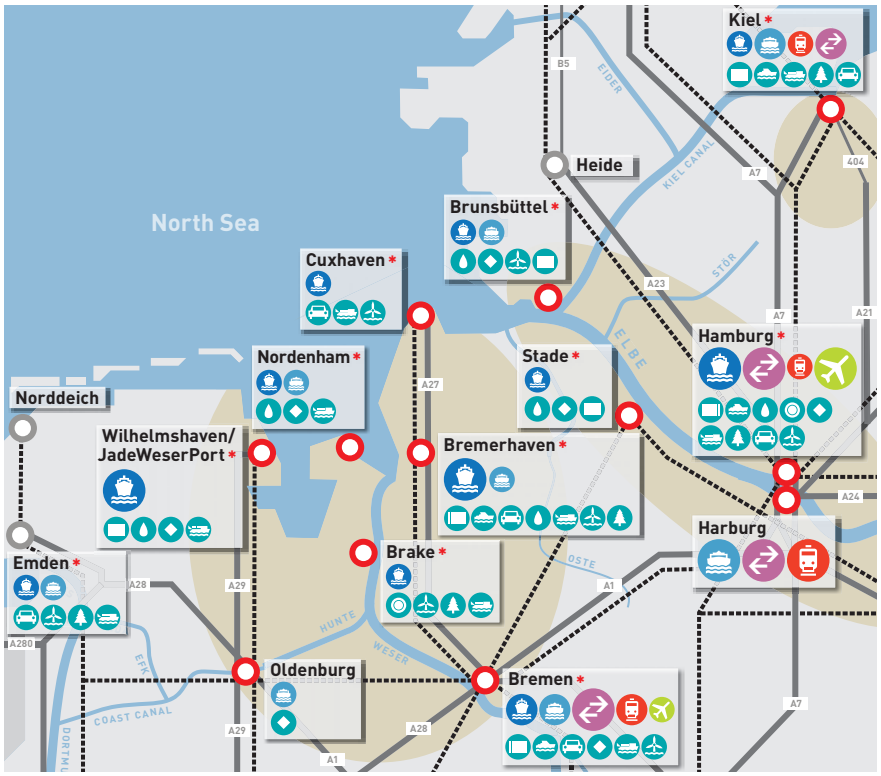
Sea Transport to/from JadeWeserPort (forecast)



Sources: Niedersachsen Ports GmbH & Co. KG, 2010; author's illustration

Photo: JadeWeserPort/Wilhelmshaven

Brunsbüttel Seaport



Seaports
Inland Ports
* Location with Inter-modal Terminal (*KV*)
Containers/ General Cargo
Ferries and Cruise Ships
Cellulose and Forest Products
Mineral Oils/ Liquid Goods
Food Products and Animal Feed
Raw- and Base Materials
Automotive Logistics Roll-on/Roll-off
Wind Power Stations
Heavy Load Transports/ Ferry/Roll-on/Roll-off/ General Cargo

Transportation Connections and Intermodal Network

Roads
State highway 5 extension of road BAB A 23 leads directly to the ports on the Elbe

Railways
- Nine km of track on port grounds with connections to the European rail network
- Port railway

Inland waterways
Unimpeded access to European inland waterway network through the North-Baltic Sea Canal and Elbe rivers

Facilities and Services

The Ports of Brunsbüttel comprise three ports

Elbehafen Brunsbüttel

Operational Equipment
- Four cranes up to 120 t lifting capacity
- Two Oil-fueling devices (DN 500; 5,000 m³/h per device)
- One liquid gas fueling device (DN 200; 500 m³/h)
- Reachstacker up to 45 t lifting capacity
- Forklifts up to 30 t lifting capacity
- Wheel loaders / mobile dredgers
- Shunting vehicles

Storage Space
- Warehouse capacity 27,900 m²
- Outdoor Storage 483,900 m²
- Nine km of rail tracks / Rail Station
- Two pairs of truck scales (range up to 60 t)

Oilport Brunsbüttel
- Five berth places
- Five jetties
- Handling rates up to 1,000 m³/h
- Vessel length up to 235.00 m
- Vessel width up to 27.00 m
- Max. draft: Jetty V up to 6.00 m, Jetties VI – VIII up to 10.40 m

Port of Ostermoor Brunsbüttel
- Six berth places
- Five jetties
- Vessel width up to 32.50 m
- Max. draft up to 10.40 m

Port Area and Usage

Total Area (Elbehafen)	50 ha
for Seagoing Vessels	
Quay walls (Elbehafen)	1 km
Number of berths	5

Freight Transport and Passenger and Ship Traffic

Freight Transport (MMRT)

2008	9.6
2009	9,9

Ship Traffic (Arrivals)

	Seagoing vessels	Inland ships
2008	922	1,926
2009	811	1,677

Brunsbüttel lies at a strategically exceptional location on the lower Elbe at the Kiel Canal, and is within close range of Hamburg. Its ports – the Elbehafen, the Oilport and the Port of Ostermoor – offer an abundance of available industrial space, as well as direct access to Europe's inland waterways and the North and Baltic Seas.

Brunsbüttel Ports GmbH serves regional, national and international customers with cargo handling, storage, transit and project logistics. The multipurpose port of Elbehafen Brunsbüttel offers logistical competencies with a customer-centric focus.

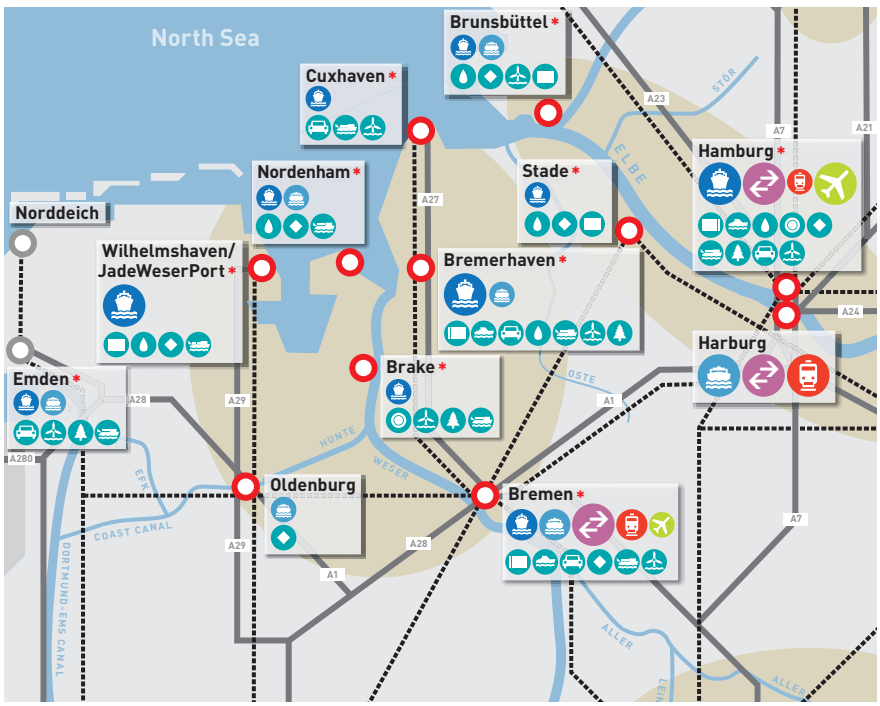
An advantageous location, combined with an extensive range of maritime services, make the Ports an attractive center for cargo handling for northern Germany's largest contiguous industrial area and the Hamburg metropolitan area. Additionally, a trimodal terminal connection offers efficient transport by truck, rail, feeder, sea vessels and barges make Brunsbüttel a prime logistical hub.

Brunsbüttel Ports: Worldwide Connections

Sources: Brunsbüttel Ports GmbH; author's illustration

Photo: Brunsbüttel Ports GmbH

Brake Seaport



Seaports
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Wind Power Stations
Heavy Load Transports/ Ferry/Roll-on/Roll-off/ General Cargo

Transportation Connections and Intermodal Network

Roads

- Rapid autobahn connection via highway B212 and through the Weser Tunnel to the A27 highway east
- Connection to southerly routes via state highway 211/212 to highway A28 and A29 west and south

Railways

Direct connection to the German and European rail network over electrified rail tracks

Waterways

Connection to the German canal network via the Mittelweser and the Rhein via the coastal canal

Inland waterways

Distance from Brake–Weser river terminus and North Sea: 44 sm

Facilities and Services

Three Terminals Handling

iron, steel, cellulose, paper, wood, project-based cargo, grains, feed, sulfer, sheet metal, gas oil, mineral oil, containers, wind energy components

J. Müller Breakbulk Terminal

handles steel, forest products, project-based cargo, wind energy components
North pier and Niedersachsen-Quay

- Four discharge bridges, capacity up to 88/60 t
- Three swing and slewing crane load capacity up to 25 t
- One mobile crane, load capacity from 12 t/140 t
- One ship loader, 1,000 t/hr
- One inner harbor swing and slewing crane with load capacity of 32 t

J. Müller Agri Terminal

handles grains and feed

- Discharge capacity: Ship: 1 x 800 t/hr + 1 x 600 t/hr; Railcar: 2 x 600 t/hr; Truck: 1 x 600 t/hr + 1 x 450 t/hr
- Load capacity: Ship: 3 x 600 t/hr
- Wagon/LKW: 1 x 600 t/hr+1 x 450 t/hr
- Self-service trucking facility: 2 x 300 t/hr
- Dryers: 1 x 50 t/hr
- Crushers: 2 x 150 t/hr
- Aspiration: 1 x 30 t/hr
- Rough grinders: 1 x 50 MMRT

LogServ Logistic Services

Germany's only sulfur handling facility at seagoing-vessel depth. About 600,000 t of sulfur is offloaded in liquid form and put into temporary storage.

Other

Self-service loading facilities: aspiration, crushing, milling, mixing, rough-grinding, drying

Storage Space

North pier and Niedersachsen-Quay

- Capacity silos and warehouses for grains and feed 360,000 t
- General cargo/other bulk cargo warehouses 165,000 m²
- Open air storage area 85,000 m²
- Liquid cargo storage 115,000 t

North Pier

- Warehouse space 165,000 m²
- Open storage space 115,000 m²
- Tank storage 15,000 t

Niedersachsen-Quay

- Open storage 100,000 m²
- LogServ–NEAG Open storage 20,000 t
- Silos 10,000 t
- Tank storage 35,000 t

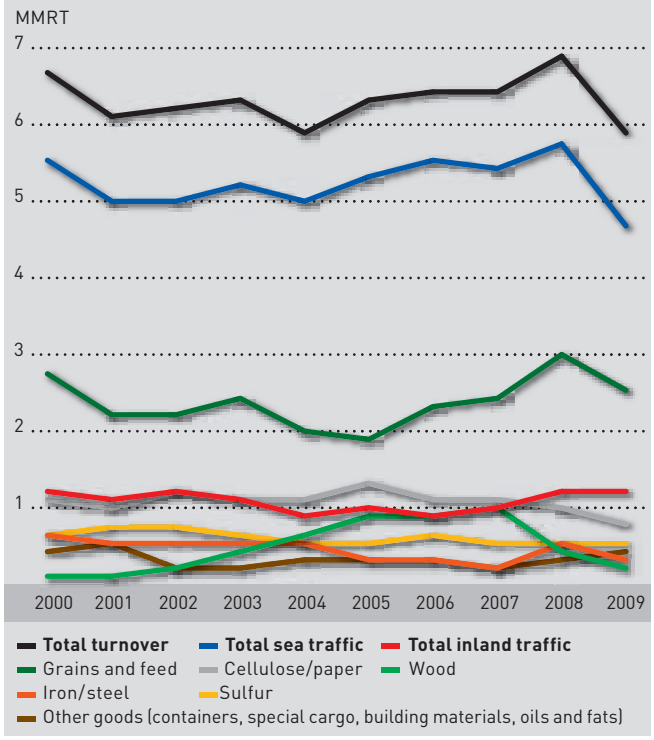
The Seaport of Brake is actually two ports on the left bank of the Weser river. The legacy port area houses the breakbulk and agri-terminals. It features warehouse and open-storage facilities as well as a 1,700 meter-long pier and four berths for seagoing vessels.

The so-called Niedersachsen-Quay started operation in August 2009. It is the port's northern extension and represents both the port's future and a significant expansion of breakbulk handling capacity. Boasting a 270-meter quay facility, a 100,000 m² terminal and the commensurate equipment, the port is slated to also offer 450 meters of quay space for large seagoing vessels once expansion is completed in 2011. Currently, 75 hectares of industrial space is available to the firms whose production and finishing capabilities go hand in hand with port turnover.

The port has benefited from growing demand for the handling of large iron and steel shipments, and improvements are being made in accordance with this development. The lower Weser will soon be able to accommodate fully loaded Handymax and smaller Panamax ships in its depths.

Brake is also making allowances for growth in the wind energy sector. It is meeting the trend towards large-scale installations with expanded and well equipped storage facilities and high-capacity cranes.

Turnover, Sea- and Inland Port of Brake (2000–2009)

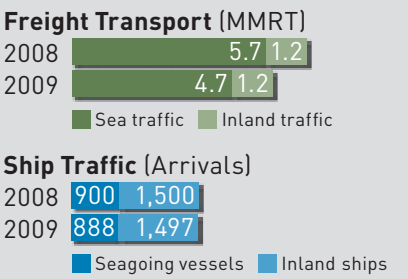


Sources: Niedersachsen Ports GmbH & Co. KG, 2010; author's illustration

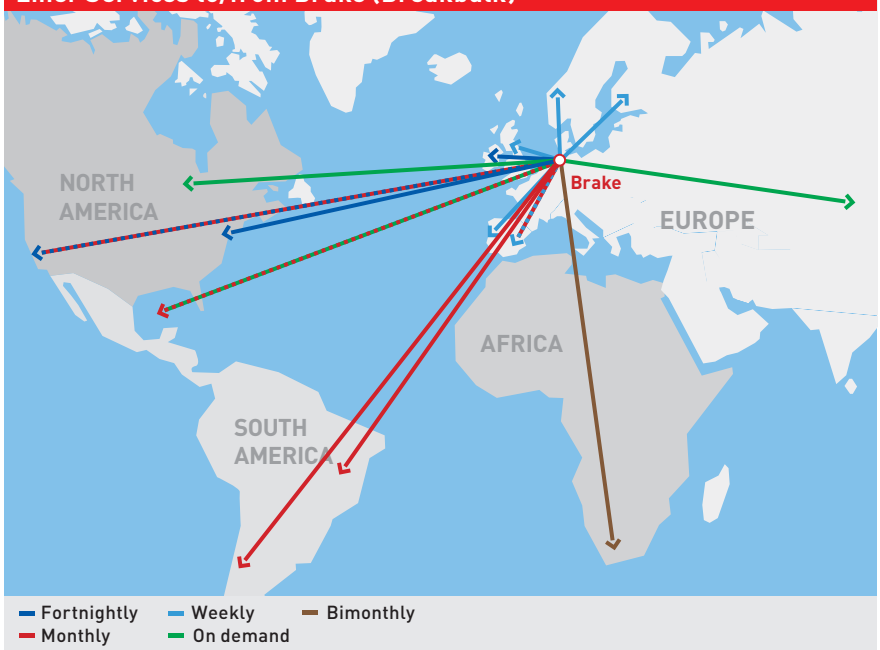
Port Area and Usage

Total Area	99 ha
Land	79 ha
Water Area	20 ha
for Seagoing Vessels	
Quay walls	3 km
Number of berths for large cargo liners (200 m)	7

Freight Transport and Passenger and Ship Traffic



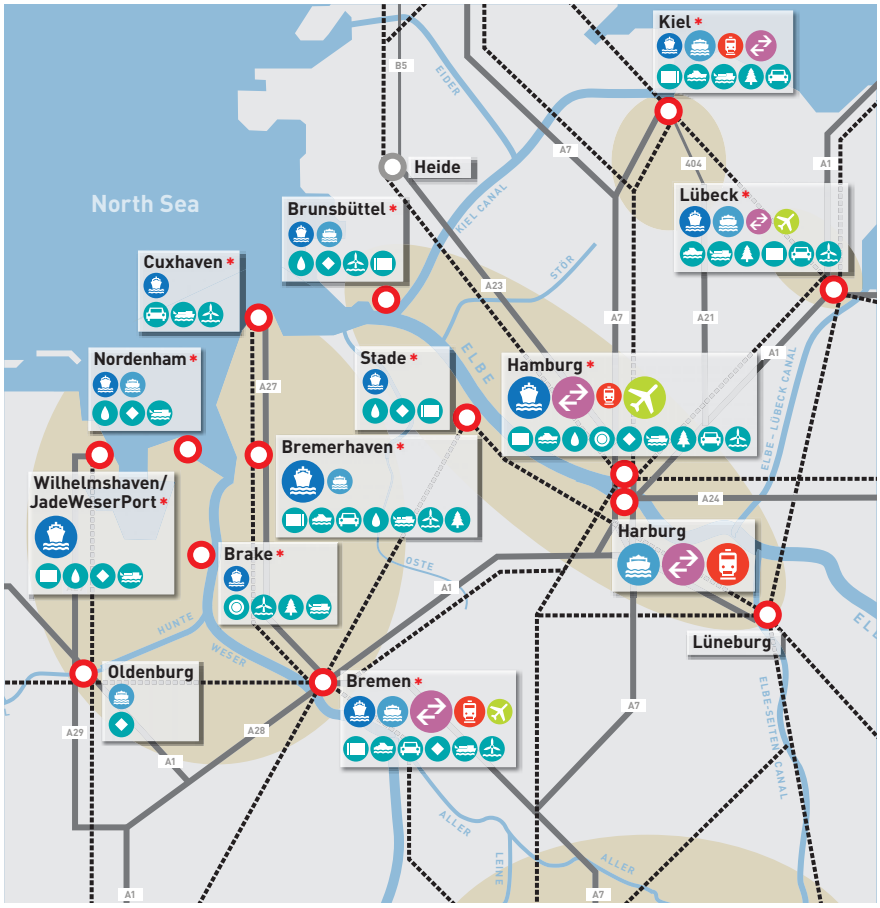
Liner Services to/from Brake (Breakbulk)



Sources: Seaports of Niedersachsen; 2010; author's illustration

Photo: Niedersachsen Ports GmbH & Co. KG

Port of Stade



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Heavy Load Transports/ Ferry/Roll-on/Roll-off/ General Cargo

Transportation Connections and Intermodal Network

Roads
Connections to Hamburg and Cuxhaven via highway B73; highway A26 (under construction) offers a route to Hamburg with optimal southerly connections

Railways
Connection to the Deutsche Bahn rail network via the two-track Cuxhaven – Stade – Hamburg route.

Inland waterways
Connection to the European inland waterway network via the Elbe river

Facilities and Services

Turnover of
- Bauxite
- Aluminum oxide
- Aluminum hydroxide
- Liquid chemicals
- Building materials
- General cargo

Notes
- 46 ha port expansion in the planning phase
- Specialized industrial port serving the aluminum and chemical industries

Storage Space

Open storage	18,500 m²

Projected enlargement of the port of Stade

Total Area:	54.8 ha
Land area	43.0 ha
Water	11.8 ha

Port Area and Usage

Total Area:	35.3 ha
Land area	12.6 ha
Water	22.7 ha

for Seagoing Vessels

Quay walls (Elbe Port)	1.487 km
Number of berths	6

Freight Transport and Passenger and Ship Traffic

Freight Transport (MMRT)

2008	6.1
2009	5.3

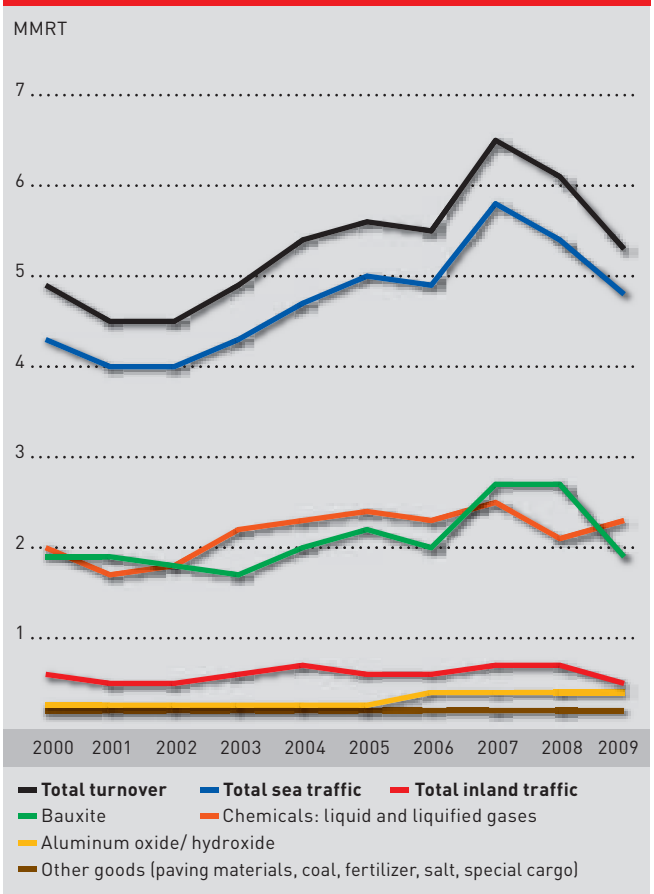
Stade is an industrial port situated directly on the Elbe river between Hamburg and Cuxhaven. The Port's secure handling and storage areas offer flood-proof turnover of bulk and general cargo on a tide-independent channel capable of accommodating large seagoing vessels. The region around the Elbe and Weser rivers complement the port with an excellent inland infrastructure.

A multitude of firms offer a full range of port and transport-related services, making Stade a standout among Niedersachsen's ports. Among the service offerings are customs clearance, mooring, turnover and storage of bulk and general cargo, towing and hazardous goods transport.

The northern section of Stade port is dedicated to bauxite offloading, as well as the loading of aluminum oxide and liquid aluminum hydroxide. The inner harbor can service ships with a closed conveyor system that runs from the port storage directly to the ship. Ships of up to 5,000 tons in capacity can be accommodated with this system; larger ships can be considered for service with advanced notice.

Finally, the port's surrounding area is the site of much industrial production that contributes to Stade's overall export traffic. It is a large producer of hydrogen, sodium hydrochloride and other chemicals. Areva and Prokon, two major European alternative energy firms, produce rotor blades for use in wind energy facilities in Stade.

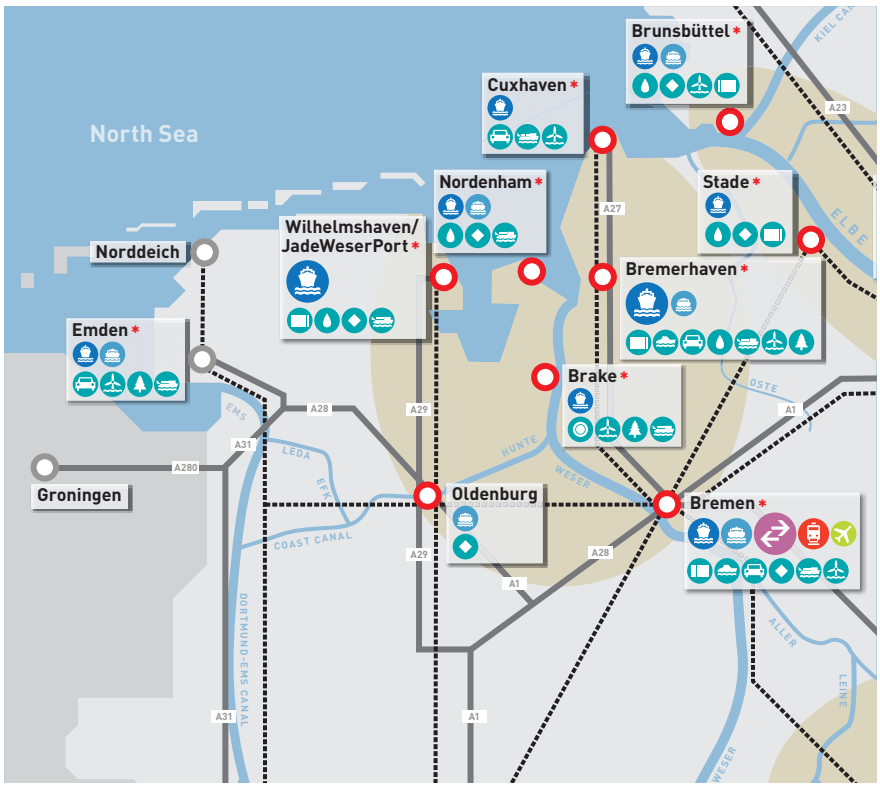
Turnover, Sea- and Inland Port of Stade (2000–2009)



Sources: Niedersachsen Ports GmbH & Co. KG, 2010; author's illustration

Photo: Niedersachsen Ports GmbH & Co. KG

Emden Seaport



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Wind Power Stations
Heavy Load Transports/ Ferry/Roll-on/Roll-off/ General Cargo

Transportation Connections and Intermodal Network

Roads
Direct connection to highways A31, A28 and Netherlands-bound routes A7 and A28

Railways
Two-track, fully electric and heavy cargo-ready rail connection to all major urban areas

Inland waterways
High-capacity connection to the entire German and Dutch inland waterway network

Facilities and Services

Turnover of
Automobiles, incl. logistics systems services for the automotive industry, forest products (wood, paper and cellulose), liquid chalk/ clay, minerals, container and special cargo, wind energy facilities/equipment, bulk cargo, magnesium chloride, liquid fertilizer, grain, feeds

- 12 roll-on/roll-off berths, floating roll-on/roll-off ramp (100 t capacity) for mobile use
- One mobile port crane
- Five cargo handling bridges
- Silo storage
- Variety of mobile handling equipment
- 45 km of tracks with a direct connection to the port's main berths

Notes
- Annual turnover of approximately 1 million new automobiles
- Germany's westernmost port
- Base port for the offshore wind energy business

- Port extension area ca. 1,300 ha

Storage Space
- Covered storage over 100,000 m²
- Open storage over 900,000 m²
- Warehouse space 27,800 m²

Port Area and Usage

Total Area	730 ha
Land	510 ha
Water Area	220 ha
for Seagoing Vessels	
Quay walls	11.75 km
Number of berths	18

Freight Transport and Passenger and Ship Traffic

Freight Transport (MMRT)

2008	6.51
2009	5.46

Ship Traffic (Arrivals)

	Seagoing vessels	Inland ships
2008	3,357	1,825
2009	2,809	1,660

The port of Emden is located about 38 nautical miles from the mouth of the Ems river. It consists of an outer port on open water and an inner port that is protected from the tide by two high-capacity sea locks that are operational 24/7 throughout the year.

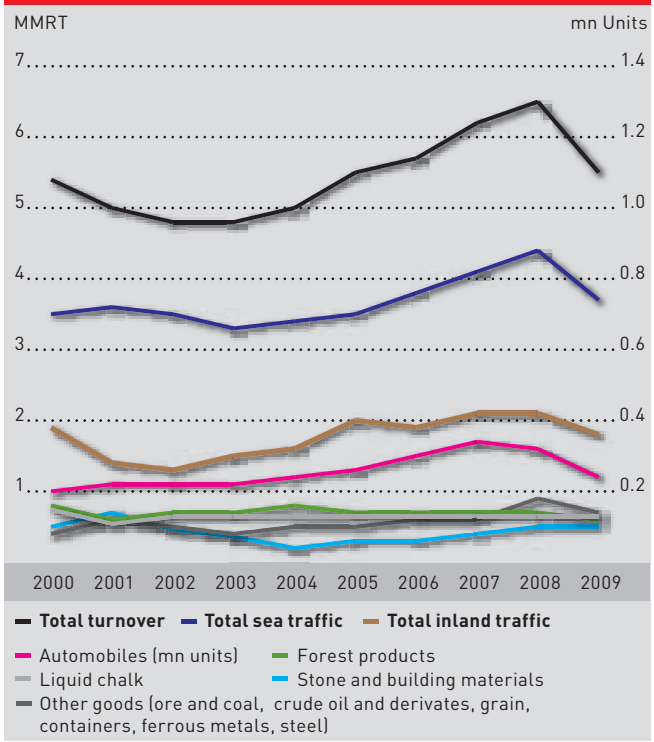
Twelve roll-on/roll-off ramps, one floating ro-ro ramp, direct rail connections at most berths and over 1 million m² of storage make Emden capable of handling all manner of goods. Emden is Europe's third largest automotive port by turnover.

Over 1 million automobiles pass through the port on their way to destinations as far-flung as the U.S., South America and southeast Asia. Additionally, forest products, paper and cellulose from Scandinavia and South America are handled in massive quantities at Emden.

Emden is also a prime service provider to the offshore wind energy industry. High-value, technologically advanced German-made wind energy components are loaded at Emden and shipped throughout the world; rotor blades and complete offshore wind power stations are built and shipped out of Emden.

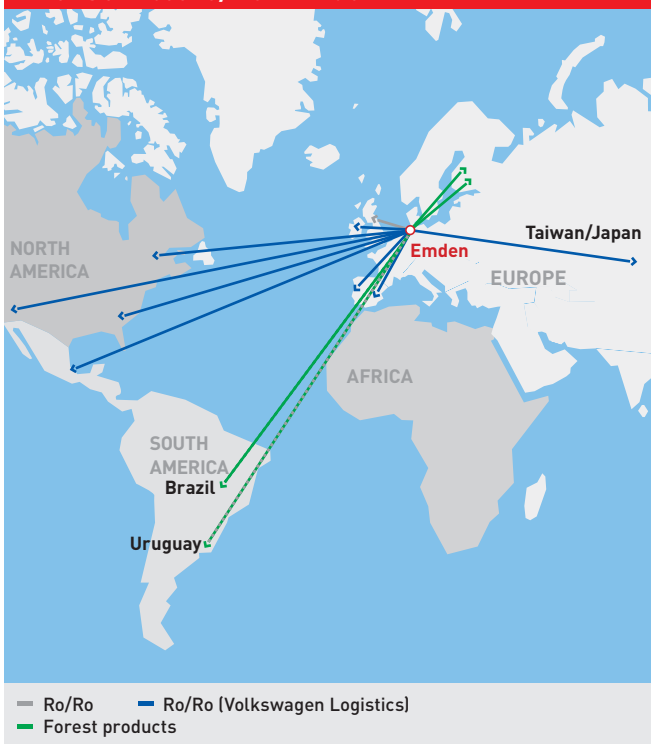
Traffic-free autobahn access allows easy access to Germany and Holland's inland waterways and fully electrified rail connections from each quay. This underscores Emden's advantages.

Turnover, Sea- and Inland Port of Emden (2000–2009)



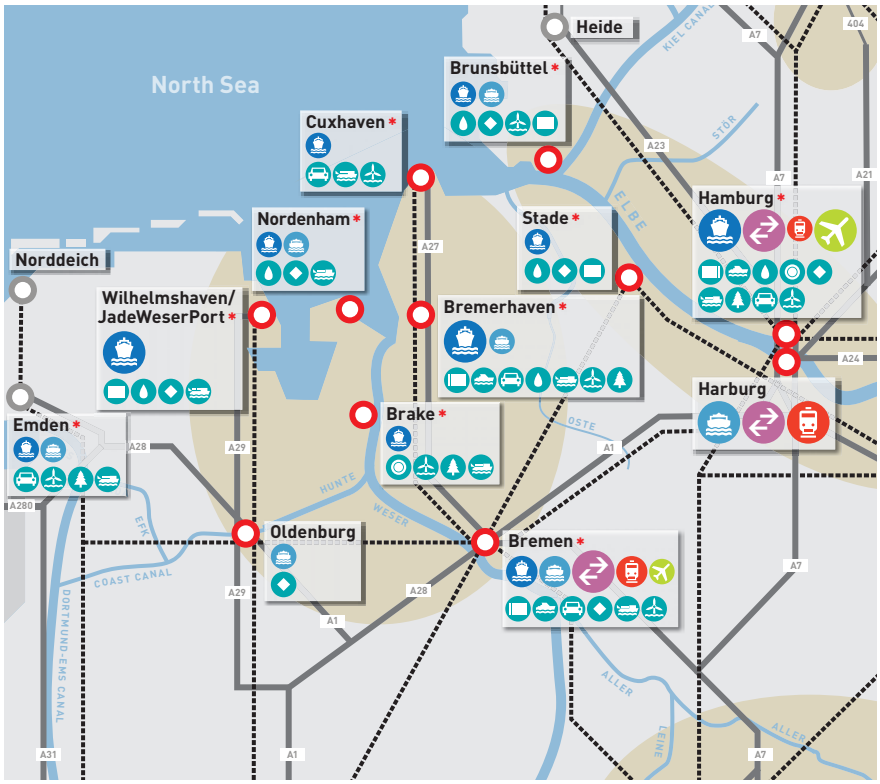
Sources: Seaports of Niedersachsen; author's illustration

Liner Services to/from Emden



Sources: Seaports of Niedersachsen; author's illustration

Photos: Niedersachsen Ports GmbH & Co. KG



Seaports
Inland Ports
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Transportation Connections and Intermodal Network

Roads
- Direct eastern and southerly connection to highway A27 via B212 road through the Weser Tunnel
- Western and southerly connection to A28 and A29 highways via state highways 211/212

Railways
Direct connection to the German and European rail network over electrical rail lines

Inland waterways
Connection to the German waterway network via the Mittelweser river; access to the Rhein via the coastal canal

Seaside
Short distance to the North Sea via the Weser

Facilities and Services

Turnover of
- Bulk cargo (coal, ore, mineral oil products)
- Logs and lumber
- Iron and steel
- Special cargo

Nordenham City Terminal
- 1,090 m quay wall
- Three discharge bridges, 36 t capacity
- One swing and slewing crane, 65 t capacity

Nordenham-Blexen Terminal
- 600 m quay wall
- One discharge bridge, 21 t capacity
- Roll-on/roll-off facility
- Climate-controlled storage facility with conveyor system
- Rail and truck loading dock

Other
- Timber processing with sawmill and drying kiln

Storage Space
- Open storage space 157,000 m²
- Covered storage space 60,500 m²
- Tank storage space 148,000 m²

Port Area and Usage

Total Area	319 ha
Land	231 ha
Water Area	88 ha
for Seagoing Vessels	
Quay walls	1.69 km
Number of berths	3

Freight Transport and Passenger and Ship Traffic

Freight Transport (MMRT)

2008	5.5
2009	5.2

Ship Traffic (Arrivals)

	Seagoing vessels	Inland ships
2008	597	1,797
2009	519	1,540

The port of Nordenham is situated directly on the deep-water shipping channel of the Weser, which also connects the port to Europe's major inland waterways. Nordenham boasts docking facilities that are fully rail-integrated; its City Terminal is optimally equipped with links to the electric railway network, and it is connected to Germany's incomparable autobahn network via state highway 212.

Nordenham is Germany's second-largest point of entry for coal imports, handling upwards of 2 million tons of coal annually. This volume is expected only to increase as incentives for domestic coal production are slowly phased out, and coal imports from Russia and Poland are in higher demand by the region's major providers of electricity.

The port of Nordenham also features specialized facilities for the handling of a variety of liquid cargo, forest products and offshore wind energy components. A bunker oil mixing station is on site to enable custom preparations of fuels tailored to customer specifications. For forest products, Nordenham is equipped with an on-site sawmill and drying kilns for the immediate processing of wood and lumber offloaded at the port. Finally, the port is uniquely equipped to handle cable ships due to the presence of Norddeutsche Seekabelwerke, a producer of cable systems used in offshore wind energy production.

Turnover, Sea- and Inland Port of Nordenham (2000–2009)

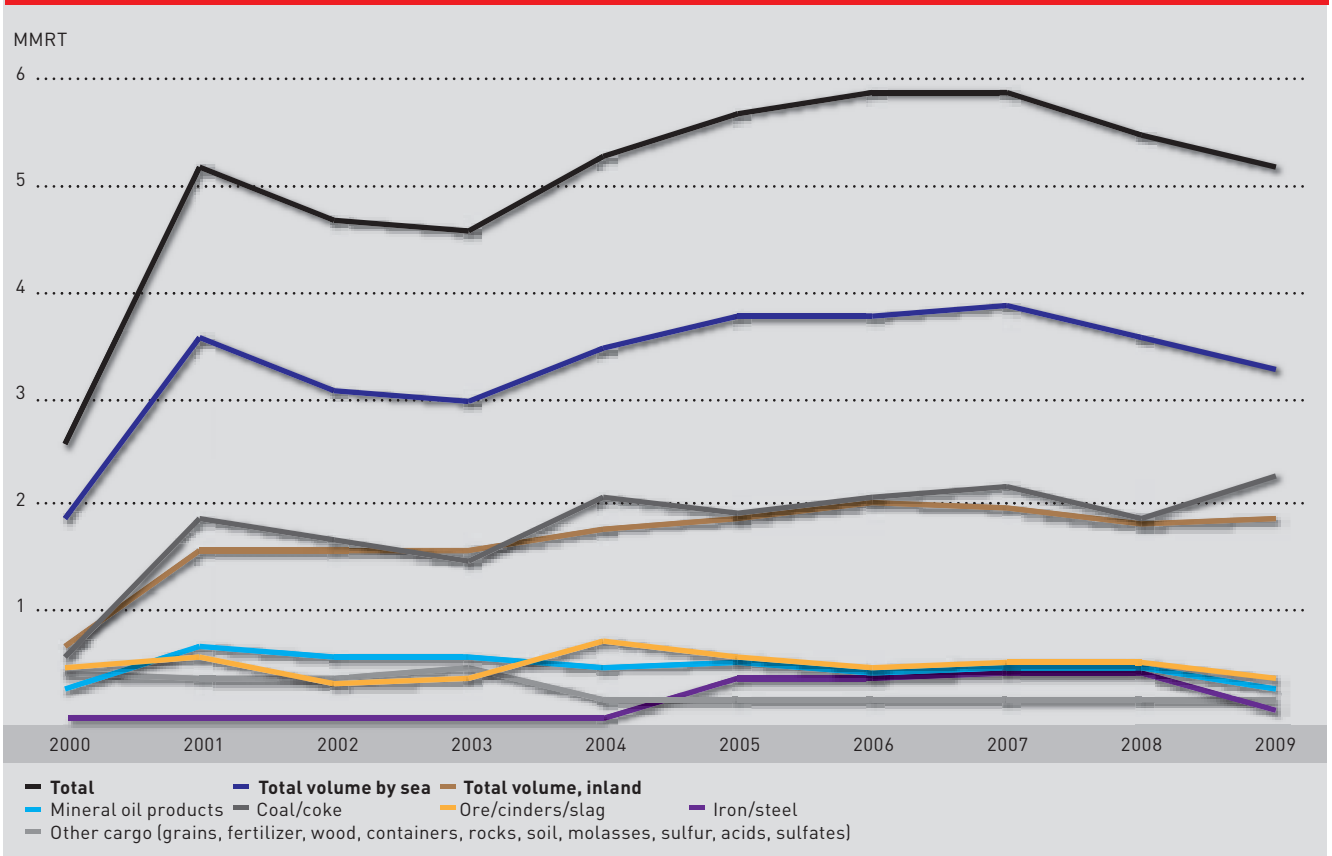

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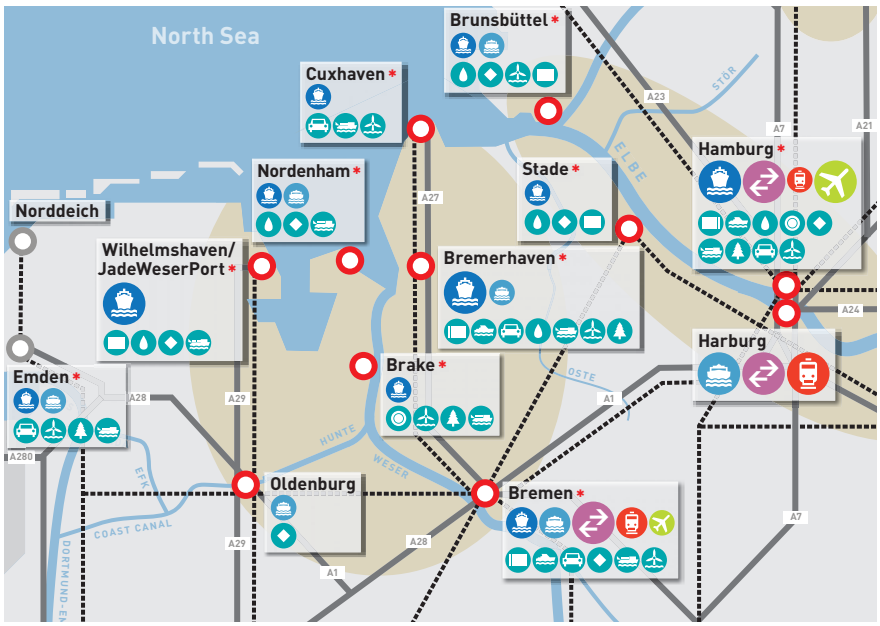
Photo: Niedersachsen Ports GmbH & Co. KG



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Transportation Connections and Intermodal Network

Roads
A27 highway to Bremen/Hannover
B73 highway to Hamburg

Railways
Several direct connections to the German and European rail network daily. Route: Hamburg – Maschen, Bremerhaven – Bremen

Waterways
Connection to the inland waterway network via Elbe river passage
- Terminal located directly on the Elbe River; short distance to the Weser
- Direct access to the Baltic Sea via the North-/Baltic Sea Canal (11 nm)
- Deep-water port (water depth of up to 15.8 m)
- Connection to the European inland waterway network

Facilities and Services

Types of Goods handled:
- General cargo/Ro-Ro
- Gravel/sand/stone chips/stones
- Vehicles
- Fishery products
- Containers
- Heavy cargo
- Wind energy components (On- und Offshore)

Europa Quay
- One container bridge
- One RoRo Pier (two-lane ramp)
- One RoRo Quay (two-lane and quarter ramp)
- Four reach-stackers
- One mobile crane (100 t)

Offshore-Terminal Cuxhaven
- Shipping facilities: Production site on the Elbe featuring a 160 m-long berth to accommodate ships of up to 110 m in length; water depth of 7.40 m and waterside access
- Port berth 116 m long and 42 m wide; water depth of 7.40 m
- Servicing berth: 100 m long; water depth of 7.40 m; one Gantry crane (500 t)

Amerika Port Humber-Quay
- One mobile crane (100 t)

Amerika Port CuxCargo-Quay
- One RoRo bridge

Amerika Port Imperator-Quay
- One floating dock

Amerika Port Neuer Lenz-Quay
- Two rail cranes (3 t)

Amerika Port Alter Lenz-Quay
- One rail crane (3 t)

Steubenhöft
- Two rail cranes
- One RoRo ramp

Lübbert-Quay

New Fisheries Port
- Lock (L 190 m B 24 m) Unloader for bulk goods
- Two Rail cranes
- One Cargo crane

Old Fisheries Port
- Lock (L 190 m B 24 m)

Old Ferry Port
- One Ro-Ro bridge

Cux. Kühlhaus GmbH

Storage Space:
- Total warehouse space: 98,000 m², including 3,000 m² of heated, covered storage space
- Refrigerated storage capacity: 100,000 m³
- Open storage space 220,000 m²

The port of Cuxhaven is situated at the mouth of the Elbe River and the North-Baltic Sea canal. It is integral to the region's efficient roll-on/roll-off and short-sea line service network, connecting the trade zones of continental Europe with the U.K., Russia, the Baltics, Iceland and Scandinavia.

The port has become a hub for the offshore wind energy industry by optimizing its infrastructure with an eye towards the industry's needs. Cuxhaven is a center for the serial production of offshore foundation structures and other components. There are sufficient accommodations for the oversized, heavy-duty components of wind energy installations to be stored, pre-assembled and loaded onto barges or installer ships. Cuxhaven boasts excellent facilities and expertise in the areas of production, assemblage, maintenance and repair of offshore wind energy rigs. Producers and suppliers can link to neighboring terminals via a heavy-capacity roadway, where a 1,500 m² heavy-duty platform with a capacity of 90 tons/ m² is available. The port's offshore base is equipped with a high-capacity gantry crane to move wind turbine bases weighing up 450 tons.

Further investment in offshore facilities is in the works: The port's offshore base services North Sea wind parks and berths designed to accommodate every stage of the production process.

Port Area and Usage

Total Area	319 ha
Land	231 ha
Water Area	88 ha
for Seagoing Vessels	
Quay walls	7.3 km
Europe-Quay	840 m
Steubenhöft	250 m
Number of berths	16
Including three berths featuring automatic roll-on/roll-off ramps	

Freight Transport and Passenger and Ship Traffic

Freight Transport (MMRT)

2008	1.9
2009	1.9

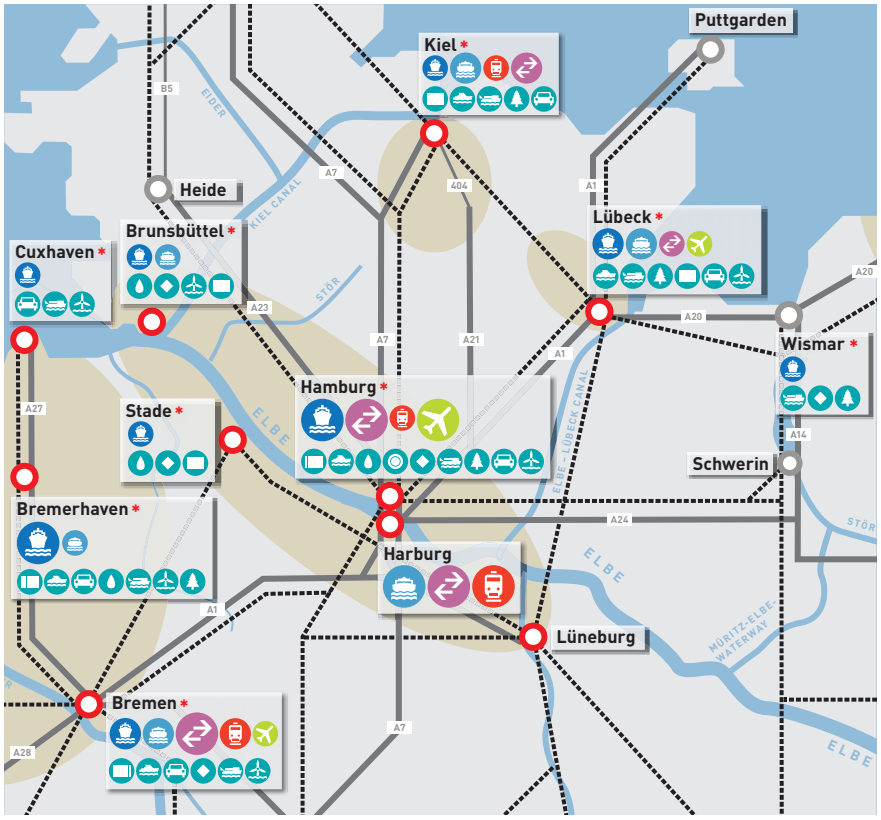
Ship Traffic (Arrivals)

	Seagoing vessels	Inland ships
2008	2,445	296
2009	1,249	103

Regular Connections to/from Seaport Cuxhaven

Source: Cuxport

Photo: Cuxport



Seaports
Inland Ports
* Location with Inter-modal Terminal (*KV*)
Containers/ General Cargo
Ferries and Cruise Ships
Cellulose and Forest Products
Mineral Oils/ Liquid Goods
Food Products and Animal Feed
Raw- and Base Materials
Automotive Logistics Roll-on/Roll-off
Wind Power Stations
Heavy Load Transports/ Ferry/Roll-on/Roll-off/ General Cargo

Transportation Connections and Intermodal Network

Roads
Highway A1, six lanes running in the direction of Hamburg
A 20, four lanes running in the direction of Szczecin, Poland and A 225
- Approximately 2,000 trucks in the port each day
- Approximately 320 containers per day

Railways
- Terminal for mixed traffic to numerous national and international departures
- 30 block train departures per week

Waterways
Seagoing traffic
- 15–20 regular departures daily
- Four terminals along the Trave river accommodating all vessel types

Inland waterways
- Connections to the Upper- and Lower Elbe regions
- Canal connection to the German waterway network

Facilities and Services

Turnover, Storage, Consignment and Distribution Logistics of
Forest products (paper, lumber and cellulose) in Lübeck, Rostock and Antwerp for all of Europe, from heavy-load cargo, bulk cargo, general cargo of all kinds, project onloading, fruits and grains

Covered Storage Space
Approximately 320,000 m² in 40 modern storage halls with sufficient floor space

Roll-on/roll-off Turnover
of trucks and tractor-trailers

Loading of
250,000 new and used automobiles including pre- and post-loading services, container turnover and container loading

Intermodal Terminals (*KV*) and Operation of a Rail Terminal for Intermodal Traffic

Port of Call for Cruise Ships

Port Area and Usage

Total Area	**220 ha**
for Seagoing Vessels	
Quay walls	7.5 km

Freight Transport and Passenger and Ship Traffic

Freight Transport (MMRT)

2008	32
2009	26

Ship Traffic (Arrivals)

2008	4,000
2009	4,000

Passenger Traffic (mn)

2008	0.36
2009	0.37

Lübeck is Germany's largest Baltic Sea port by far and its largest roll-on/roll-off port. In 2009, Lübeck saw 26.3 million tons in turnover. It is the most south-westerly of the Baltic Sea ports and is ideally situated between Western and Central Europe's traditional centers of commerce, and offers quick access to the rapidly developing Baltic corridor. Lübeck's main strength lies in roll-on/roll-off traffic, with 2009 turnover of 720,000 trucks and trailers and 64,000 new vehicles.

The port is also Europe's largest handler and distribution center for the European paper industry. In 2009, around 3.5 million tons of paper were turned over at the port of Lübeck.

As a major and longstanding partner to the forest products industry, Lübeck is a specialist in the handling of all materials related to paper production from pulp and cellulose to the finished products.

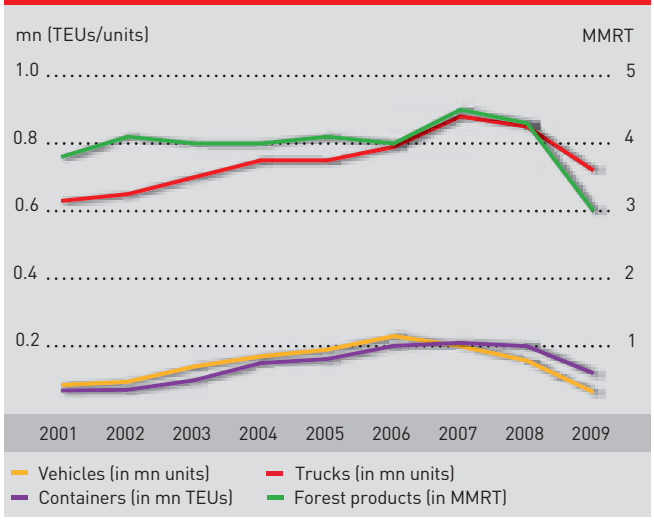
Finally, optimal transport connections are a given: a three-lane highway connects the city to Hamburg, one of Europe's main economic centers. Its rail connections are also distinguished by efficient carload- and combined freight traffic. Around 150 block trains run from Lübeck to Europe's industrial centers each week. And the Elbe-Lübeck Canal offers entry to the entire European inland waterway network.

Lübeck: A European Hub

Sample Delivery Times: Basel/Northern Italy – Scandinavia/Baltic Sea

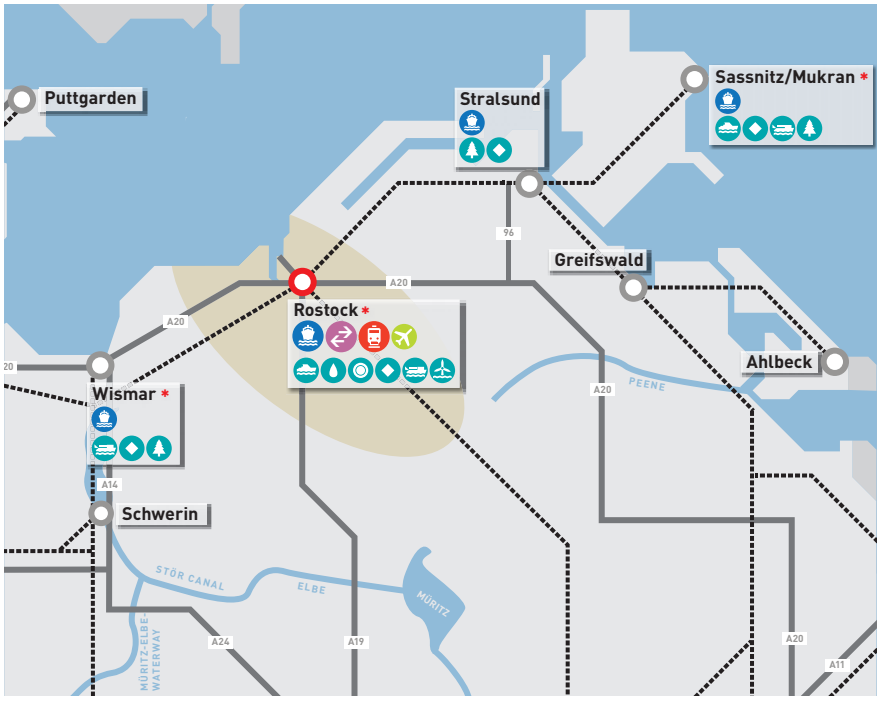
Sources: Lübeck Port Authority; author's illustration

Main Cargo at the Port of Lübeck (2001-2009)



Sources: Lübeck Port Authority; author's illustration

Photo: Lübeck Port Authority



Seaports
Inland Ports
* Location with Inter-modal Terminal (*KV*)
Containers/ General Cargo
Ferries and Cruise Ships
Cellulose and Forest Products
Mineral Oils/ Liquid Goods
Food Products and Animal Feed
Raw- and Base Materials
Automotive Logistics Roll-on/Roll-off
Wind Power Stations
Heavy Load Transports/ Ferry/Roll-on/Roll-off/ General Cargo

Transportation Connections and Intermodal Network

Roads
A19 highway, Berlin – Rostock (runs through the port)
A20 highway, Lübeck – Szczecin, Poland

Railways
- Electrical rail lines through Magdeburg, Berlin and Hamburg and further points inland originate at Rostock's port rail station
- 45 km rail network on port grounds
- Planned expansion of rail terminals to five tracks in block train – length and loading/discharge capacity of 120,000 units
- Switch yard with 180 km of track

Pipilines
Pipelines connecting Rostock – Schwedt and Rostock – Böhlen/Leuna

Airport
Rostock – Laage airport is within 40 km of the port

Facilities and Services

Universal port focusing on droll-on/roll-off and ferry traffic, cargo handling and stevedoring

Turnover
46 berths, including 28 specialized berths: ferry berths (5), roll-on/ roll-off ships (4), building materi-als/coal (4), cement (2), grains (3), fertilizer (1), heavy-load cargo (2), liquid cargo (6), chemicals (1)

- Crane units with up to 100 t capacity
- Two ship unloaders for coal (discharge rate of up to 1,000–2,000 t/hr)
- One grain elevator (unloader) (discharge rate of up to 300 t/hr)
- Two grain loaders (load rate of 1,000 t/hr each)
- One fertilizer loader (load rate of 1,000 t/hr)
- Mobile handling units: tuckmaster, reach stacker, forklift (up to 45 t capacity), wheel-loader, compact loader

Storage Space
Open-air storage for:

- General cargo	600,000 m²
- Dry bulk cargo	420,000 m²

Covered storage for:

- General cargo	120,000 m²
- Dry bulk cargo	55,000 m²
- Tank storage	700,000 m³
- Cold storage	7,000 m³
- Grain silos	436,000 t

Other
- Two waste and recycling proces-sors, one belt loader, two raspers, rail wagon loading station
- Conveyor belt system, weight station for automotives

Port Area and Usage

Total Area	750 ha
Quay walls for Seagoing vessels:	11 km
for Seagoing Vessels	
Number of berths	46

Freight Transport and Passenger and Ship Traffic

Freight Transport (MMRT)

2008	27.2
2009	21.5

Ship Traffic (Arrivals)

2008	9,426
2009	8,165

Passenger Traffic (mn)

2008	2.4
2009	2.1

Rostock has a history covering 800 years as a Hanseatic port. And intermodal traffic to and from points as far as Basel and Verona make the city on the Baltic is an important junction between Scandinavia and Central Europe.

Rostock's latest incarnation as a universal port with strong ties to Scandinavia, the Baltic States and Russia has been fueled by over EUR 100 million in investment made in the port's infrastructure since German reunification. In 2009, total turnover at the port reached 21.5 millions tons and 2.1 million passengers.

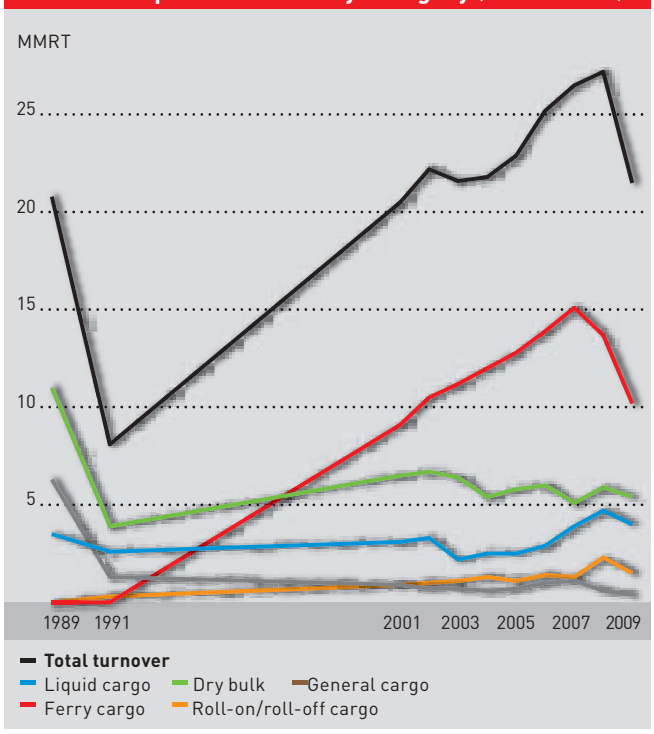
Since reunification, the port has been transformed through a series of upgrades, equipping it with a modern oil port, dry bulk handling facilities, and terminals for general cargo export. The port's strengths lie in ferry and roll-on/roll-off traffic. Ro-ro turnover reached 1.5 million tons in 2009, much of it is attributed to paper imports from Finland. Rostock is also an important transshipment point for building materials, fertilizer and grains, and up to 20,000 tons of coal are discharged daily at two specialized berths.

The flow of goods from the port is eased by direct transit connections. The A20 highway runs from Berlin right onto the port grounds, rail lines connect the port to inland destinations through Magdeburg and Berlin, and liquid cargo can be expedited through pipelines running to the industrial areas of Schwedt and Böhlen/Leuna.

Direct Maritime Traffic Routes to/from Rostock

Sources: Hafen-Entwicklungsgesellschaft Rostock mbH 2010; author's illustration

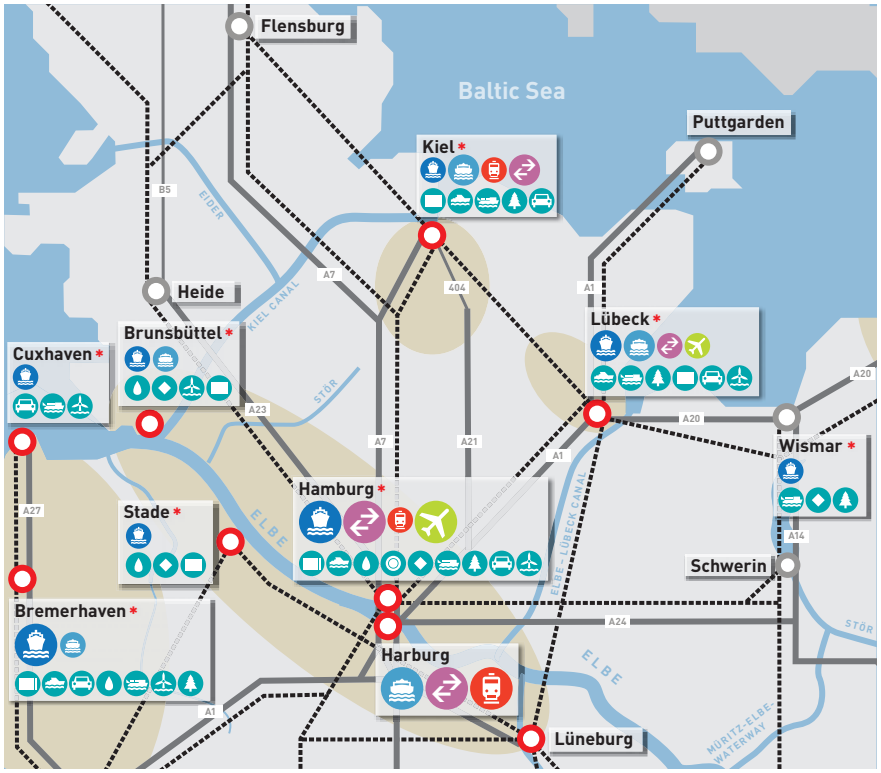
Rostock Seaport: Turnover by Category (1989 – 2009)



Sources: Hafen-Entwicklungsgesellschaft Rostock mbH 2010; author's illustration

Photo: Port of Rostock

Port of Kiel



Seaports
Inland Ports
* Location with Inter-modal Terminal (*KV*)
Containers/ General Cargo
Ferries and Cruise Ships
Cellulose and Forest Products
Mineral Oils/ Liquid Goods
Food Products and Animal Feed
Raw- and Base Materials
Automotive Logistics Roll-on/Roll-off
Wind Power Stations
Heavy Load Transports/ Ferry/Roll-on/Roll-off/ General Cargo

Transportation Connections and Intermodal Network

Roads
Highways A215 and A7 via Hamburg
Highway A21 to Berlin

Railways
Direct connection to the German and European rail network six times per week

Inland waterways
Connection to the European inland waterway network via Kiel-Canal

Facilities and Services

Transit point for international ferry traffic and port of call for cruise and ferry vessels

- Loading and unloading of RoRo- and LoLo-vessels and rail wagons
- Loading and unloading of containers, forest products, general and bulk cargo, heavy and project cargo
- Automotive logistics
- Car and passenger handling
- Tallying, measuring and weighing of all types of cargo
- Unitizing of cargo
- Video checking of cargo units
- Wayport at the Kiel-Canal

Facilities

- Modern passenger and cargo terminals in the City Harbours, Norwegenkai and Schwedenkai with way connection
- Cargo center Ostuferhafen with ten berths, modern RoRo-bridges, crane handling (up to 140 t), open-air storage areas and warehouses and intermodal terminal
- Regular rail connections to and from Germany, France, Greece, Italy, the Netherlands, Austria, Poland, Switzerland, Slovakia, the Czech Republic and Hungary

Port Area and Usage

Total Area	73.4 ha
Quay length over all	5.1 km
Number of berths	19
incl. berth for roll-on/roll-off ships	11

Freight Transport and Passenger and Ship Traffic

Freight Transport (MMRT)

	Scandinavia	Russia/Baltic States	
2008	1.6	1.8	1.5
2009	1.7	1.6	1.6

Incl. ferry services to:

Ship Traffic (Arrivals)

2008	1,918
2009	1,762

Passenger Traffic (mn)

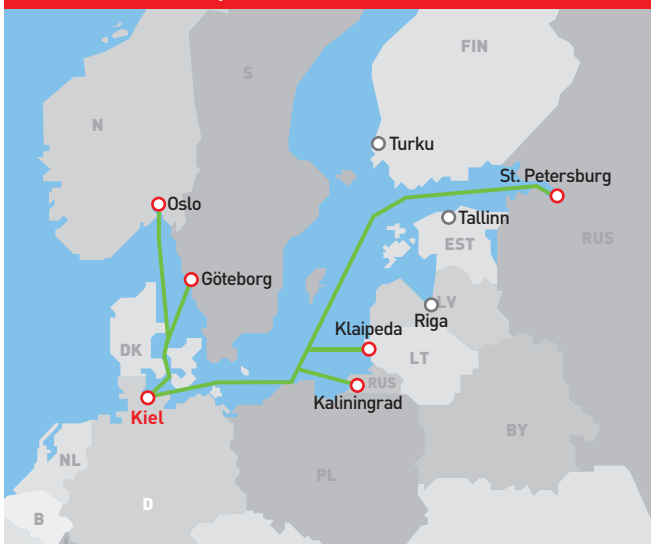
2008	1.8
2009	1.9

The Port of Kiel is one of the most versatile and cost-effective Baltic Sea ports, featuring sufficient water depth for seagoing ships in all areas. The port also has direct links to rail and road networks, and a favorable position at the mouth of the Kiel Canal, the world's most-frequented artificial waterway. A combination of geographic advantages, modern passenger facilities and easy access has also been decisive in creating Kiel's reputation as a significant German cruise shipping port.

Kiel's distinctive port districts are arrayed along the fjord. With quays exceeding 5,100 meters in length, the port offers just the right facilities for ocean-going and inland ships of almost every size. Adequate storage and handling areas are available for cargo of every description in all the port's districts and terminals. Three modern terminals close to the city center are ideal for passengers, while the Ostuferhafen terminal is mainly for freight traffic.

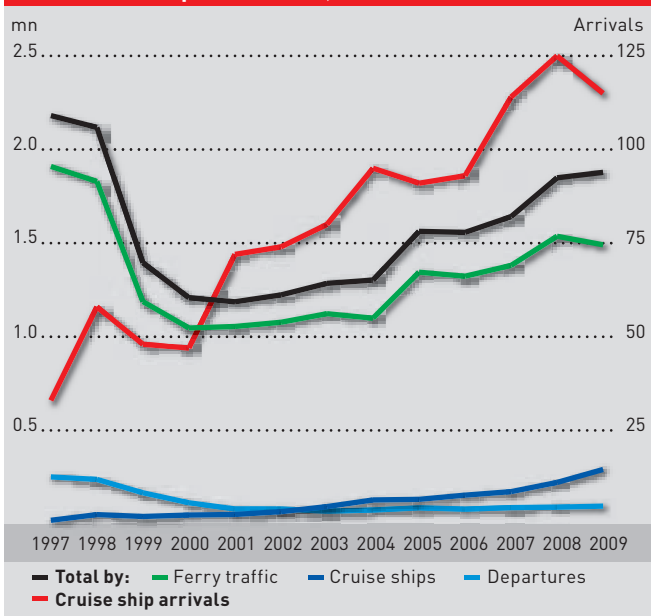
Several on-site stevedoring companies offer an extensive range of services, ensuring that ships and cargo are handled expertly and competitively. Rapid and skilled execution of all transport operations for containers, bulk, general cargo and project cargo is assured – together with the commensurate services. All areas of the port are served by efficient rail-track facilities coordinated from the Meimersdorf shunting station.

Liner Services to/from the Port of Kiel



Source: Port of Kiel

Passengers by Ferry Traffic, Cruise Ships, Departures and Cruise Ships (Arrivals), Port of Kiel (1997 – 2009)



Sources: Port of Kiel, 2010, author's illustration

Port of Kiel: Hinterland Connections

Source: Port of Kiel and Kombiverkehr, 2010

Photo: Seehafen Kiel

Port of Sassnitz/Mukran

Seaports
Inland Ports
* Location with Inter-modal Terminal (*KV*)
Containers/ General Cargo
Ferries and Cruise Ships
Cellulose and Forest Products
Mineral Oils/ Liquid Goods
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Automotive Logistics Roll-on/Roll-off
Wind Power Stations
Heavy Load Transports/ Ferry/Roll-on/Roll-off/ General Cargo

Transportation Connections and Intermodal Network

Roads
Highway A20 to Stralsund (four lanes), New Rügen bridge (three lanes)
B96 new planned expansion to three lanes in progress

Railways
- Two-track, fully electrified rail lines up to ferry port
- Open track capacity inland from the port

Maritime Connections
- Up to 50 regular ferry and roll-on/ roll-off departures weekly to Trelleborg, Sweden; Rønne; Bornholm; Klaipeda, Lithuania; Ventspils, Latvia; St. Petersburg and Baltiysk, Russia

Overland Connections
- Up to five regular train connections
- Single-car and block train traffic

Facilities and Services

Western Europe's only port facility with the capability to handle Russian wide-gauge rail cars

Largest Rail Ferry Port in Germany
- Ferry, roll-on/roll-off and cruise ship terminal
- Sea terminal, and
- Rail terminal

Turnover
- General cargo turnover
- Dry bulk cargo turnover
- Container handling
- Hazardous materials turnover
- Seaworthy packing
- Load securing
- Ship repair
- Provisioning and sanitation
- Clearance
- Trailer checking
- Nine berths
- Two mobile port cranes: 104 t
- Quayside crane: 10 t
- Two gantry cranes (32 t each)
- Ground handling system
- Terminal trucks and trailer equipment

Storage Space
- Covered storage 6,000 m²
- Open-air storage 130,000 m²
- Cold storage 10,000 m²

Port Area and Usage

Total Area (including offshore area)	80 ha
Quay walls for seegoing vessels	2 km
for Seagoing Vessels	
Number of berths	9

including six ferry, roll-on/roll-off and cruise ship berths and three sea terminals

Freight Transport and Passenger and Ship Traffic

Freight Transport (MMRT)

2008	5.0
2009	3.7

Ship Traffic (Arrivals)

2008	3,100
2009	2,630

Passenger Traffic (mn)

2008	0.8
2009	0.7

Of all of Germany's ports, Sassnitz is the one with the shortest geographical and nautical distance to Scandinavia, Finland, Russia and the Baltic States. Since its Scandinavia terminal became operational in 1998, it has become Germany's most profilic location for railway ferry transshipments.

Sassnitz is also the only port in western Europe with the capability to receive and handle Russian wide-gauge railcars. 40 km of of wide-gauge tracks criss-cross the port to accommodate the Russian-gauge railcars. The grounds host five covered depots for the conversion of wide-gauge railcars to European gauge, four mobile cranes, as well as pumplines for liquid and hazardous cargo. This infrastructure enables the turnover of a wide variety of general and liquid cargo in large quantities.

Sassnitz has undergone a EUR 98 million modernization process since 1998 that has enhanced its ideally accessible location right at the open ocean. Its navigable depth of 10.5 meters and modern quay facilities make Sassnitz accessible to most types of ships operating in the Baltic region.

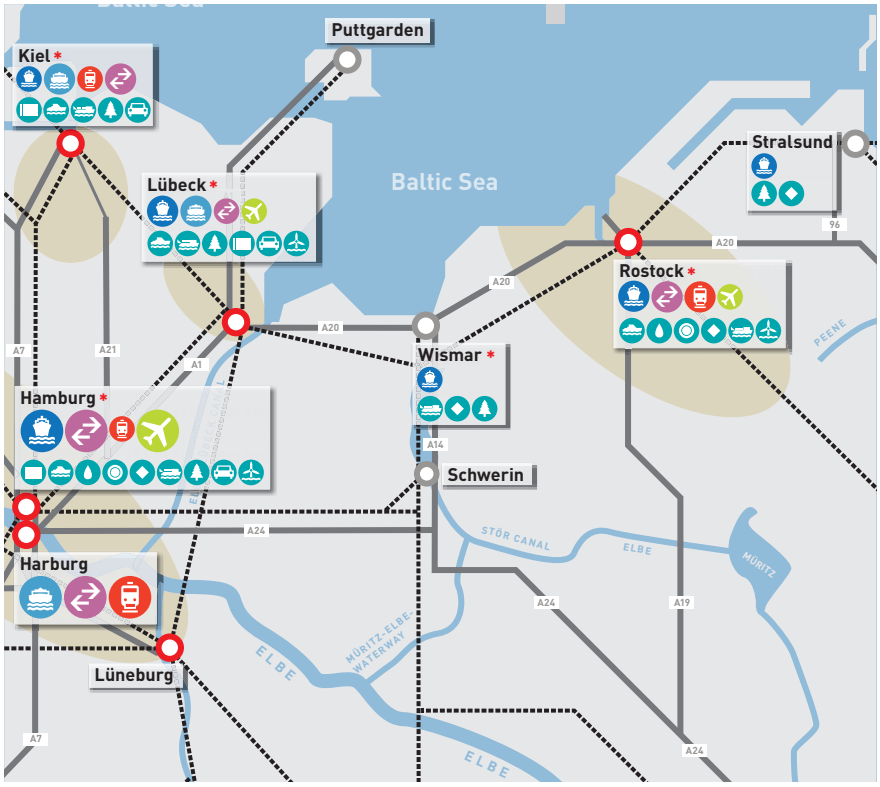
Currently, the infrastructural groundwork is being laid to enable the port to serve as a base for the installation and servicing of offshore wind power installations in the Baltic Sea.

Photo: Port of Sassnitz/Mukran

Regular Scheduled Routes/Ferry Traffic and Connections from the Port of Sassnitz/Mukran

Sources: Port of Sassnitz/Mukran 2010, author's illustration

Wismar Seaport



Seaports
Inland Ports
* Location with Inter-modal Terminal (*KV*)
Containers/ General Cargo
Ferries and Cruise Ships
Cellulose and Forest Products
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Automotive Logistics Roll-on/Roll-off
Wind Power Stations
Heavy Load Transports/ Ferry/Roll-on/Roll-off/ General Cargo

Transportation Connections and Intermodal Network

Roads
Direct connection to highway A20 (East-West) and A14 (North-South)

Railways
Connection to electrified freight traffic network of German rail system (25 km of tracks on port grounds)

Facilities and Services

Turnover of
- Bulk cargo, metals, wood, break-bulk, special cargo, containers, liquid cargo and rolling cargo

Services
Maritime goods inspection, storage, management of customs storage, tallying, weighing and commissioning, load securing, distribution, comprehensive transport consultation as well as development of complete supply chains

Equipment
- 13 quayside cranes (up to 45 t)
- One LHM 400 mobile crane (up to 104 t, suitable for container handling)
- Five mobile cranes (up to 7 t)
- Tugmaster and trailer equipment
- Forklift truck (up to 32 t), wheel loaders
- One Reach Stacker
- One RoRo-ramp
- Pumpline for liquid cargo up to 1,000 m³ per hour
- Loading mechanism for turnover of sensitive bulk goods (load capacity of up to 650 t/h)
- Direct-load facility for bulk goods
- Processing facility for liquids, chemical products and mineral oils

Storage Space

Open-air storage	100,000 m²
Covered storage	21,900 m²
Peat terminal	30,000 m³
Bulk cargo depot	90,000 t
Tank capacity	16,000 m³

Port Area and Usage

Total Area: (including offshore area)	80 ha
Quay walls for Seagoing vessels	2.3 km
Number of berths for Seagoing vessels	15

Freight Transport and Passenger and Ship Traffic

Freight Transport (MMRT)

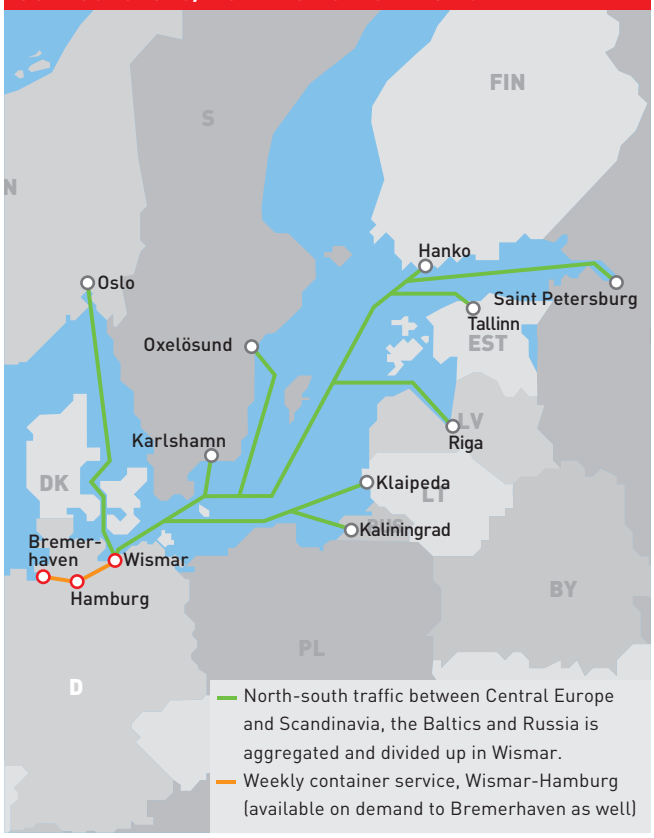
2008	3.4
2009	3.2

Ship Traffic (Arrivals)

2008	1,300
2009	1,134

Photo: Port of Wismar

Connections to/from the Port of Wismar



Sources: Seaport Wismar 2010, author's illustration

As the southernmost German port on the Baltic Sea, Wismar is an ideal import and export hub for many types of cargo. Wismar is the transit point where north-south traffic between Central Europe, and Scandinavia, the Baltic States and Russia splits.

Turnover at the port is concentrated in environmentally or weather-sensitive bulk cargo, liquid and solid chemicals, timber, iron, steel and building materials. Cranes and wind power station components are an additional growth area in Wismar's goods turnover. Consistent investment in the port's infrastructure has resulted in a number of significant improvements. These include an increase of the port's navigable depth to 11.5 meters, the development of new berths, efficiency-boosting machinery like the port's 104-ton mobile crane and considerable upgrades to the port's IT infrastructure.

Wismar is well connected with the European inland over an electrified rail link, the extended A14 motorway from Wismar to Schwerin, and the A20 highway that runs from Lübeck to Szczecin, Poland. The port combines leading-edge port technology with dedicated, highly qualified workers to offer rapid on and offloading as well as specialized services from goods inspection and storage to distribution, comprehensive transport consultation and development of complete supply chains.

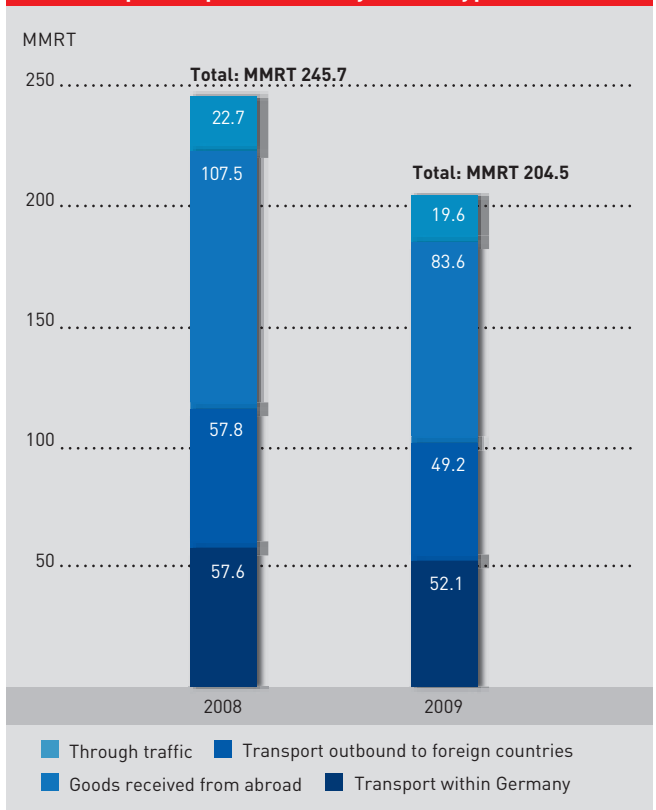
Germany's Significant Inland Ports and Waterway Traffic

Germany's inland ports are reliable regional freight hubs, offering an ideal combination of access to roads, rails and waterways. The Rhein is the main artery of the inland waterway system, handling over 50% of total traffic. The port of Duisburg claims the top spot with 35 million tons turnover in 2009, followed by Cologne. Hamburg, which is the only non-Rhein port in the top seven of the inland ports, is the third in volume. Rounding out the top seven are Mannheim, Lugwigshagfen, Neuss and Karlsruhe.

Inland ports offer a wide variety of facilities and services to handle high-value bulk and general cargo, containerized goods and palletized products. Logistics service providers support the ports' infrastructure offerings: rail traffic handlers provide a logical complement to the waterways, offering customers strategic access to inland destinations. Europe's recent railway market liberalization has eased the flow of goods throughout the continent, regardless of the national rail line from which a given load originates.

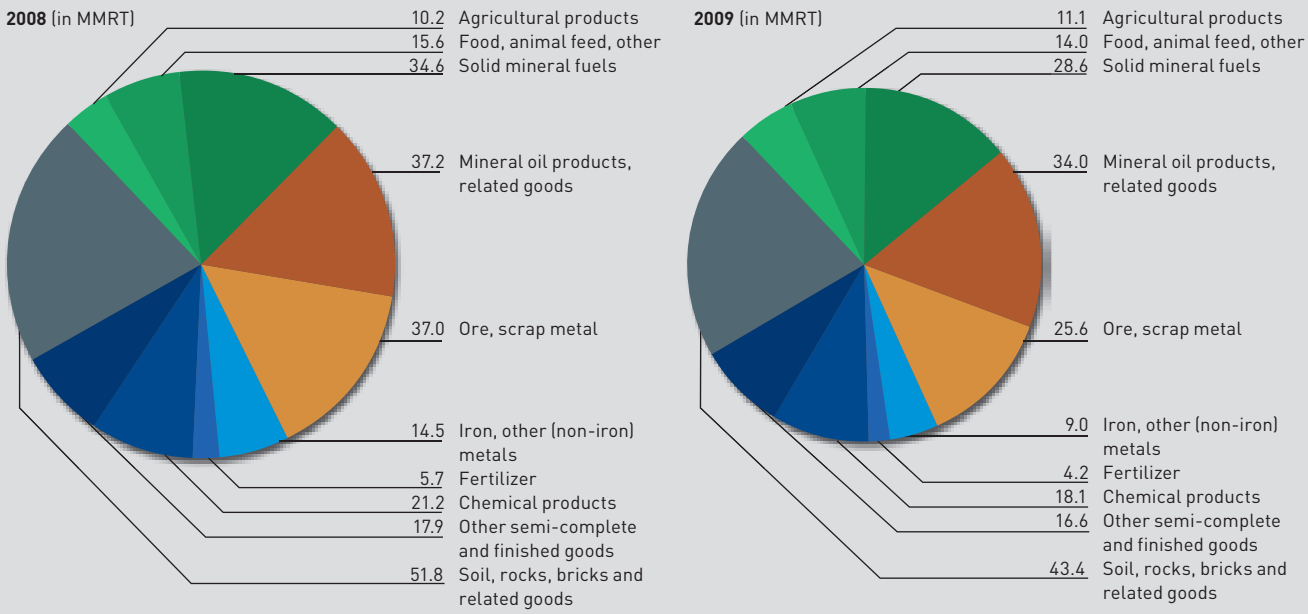
Turnover and traffic inland within Germany is back on the upswing. In the past year, 204.5 million tons of goods were handled through Germany's inland port network. Container handling has been a perennial bright spot, with volumes moving towards pre-recession levels as early as December 2009. Turnover from foreign countries, which has typically accounted for ca. 40% of all traffic is also slowly recovering.

Inland Ship Transport Volume by Traffic Type (2008 – 2009)



Sources: German Federal Statistical Office, www.destatis.de 2010, author's illustration

Inland Ship Transport Volume by Cargo Type (2008 – 2009)



	2008	2009
Total (MMRT):	**245.7**	**204.5**
Total Inland / troughput (bn of ton-km):	64.1	56.9
Containers (mn TEUs):	2.1	1.9

Sources: German Federal Statistical Office, www.destatis.de 2010, author's illustration

Total turnover in MMRT (million metric tons)

1	30.1 – 50.0 MMRT
2	10.1 – 30.0 MMRT
3	5.1 – 10.0 MMRT
4	3.6 – 5.0 MMRT
5	2.5 – 3.5 MMRT

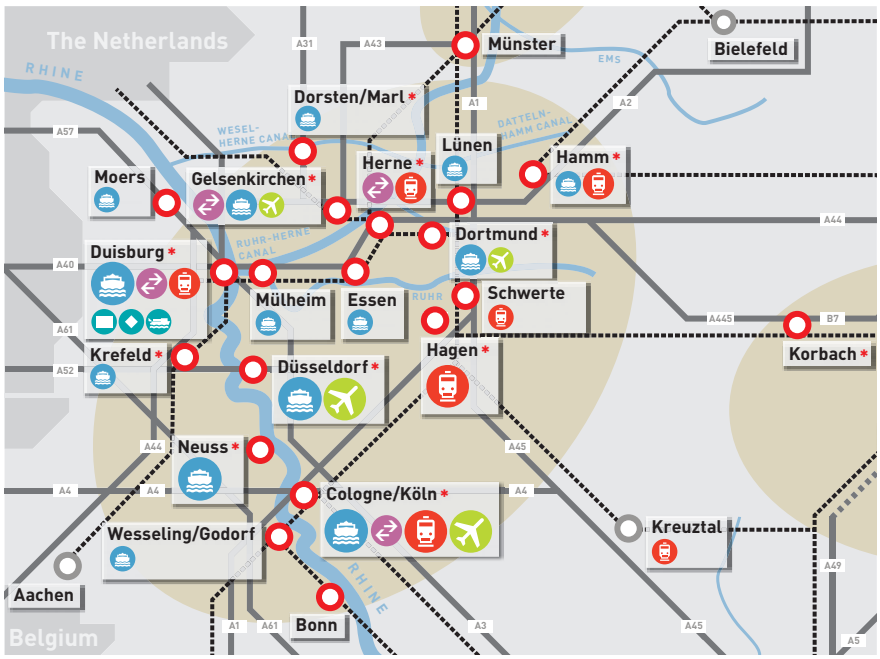
Seaports
Inland Ports
Navigable Waterways

0 km 50 km 100 km

Over 50% of traffic on Germany's inland waterways passes through the Rhine.

Sources: German Federal Statistical Office, www.destatis.de, 2010, author's illustration

Duisburg Inland Port – The World's Number One Inland Port



Seaports
Inland Ports
Location with Inter-modal Terminal (*KV*)
Containers/ General Cargo
Ferries and Cruise Ships
Cellulose and Forest Products
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Raw- and Base Materials
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Wind Power Stations
Heavy Load Transports/ Ferry/Roll-on/Roll-off/ General Cargo

Transportation Connections and Intermodal Network

Roads

Highway connections:
- Two east-west and three north-south connections
- Connection to the BAB 3, 57, 59, 40 and 42
- Seven highway interchanges
- 21 highway entrances

Railways

Regular freight rail connections to 18 inland, 55 foreign and 16 European destinations in combined traffic

Waterways

Situated directly on the Ruhr and on the Rhein, the most heavily trafficked river in Europe, direct connection to the German and European waterway network and the North Sea

Facilities and Services

Inland Hub for the Ports of Zeebrugge, Antwerp, Rotterdam and Amsterdam
- Warehousing and storage
- Handling/processing of goods/cargo
- Contract and project logistics
- Automotive logistics
- Heavy goods logistics
- Packaging logistics
- Eight container terminals featuring 16 container bridges with 55 t capacity; this includes two terminals with up to nine parallel tracks for the simultaneous handling of block trains
- Nine halls equipped for moisture-sensitive turnover
- Mixed coal and loading facility
- Five coal import terminals
- Six service centers for the processing/handling of steel products
- Two roll-on-/roll-off facilities
- 19 facilities for liquid cargo handling
- 130 cranes with up to 50 t capacity
- Turnover area equipped with a stationary crane with 300 t capacity and a mobile caterpillar crane with up to 100 t capacity for heavy and bulk goods equipped

Other
- 350 container-rail shuttles originate from Duisburg every week
- 37 km of coast, including 16 km of turnover space with rail connection
- Approximately 300 logistics service providers on port grounds

Storage Space
- 1.5 mn m² of covered storage space, including around 740,000 m² warehouse space for contract logistics, ca. 0.6 mn m³ liquid storage tank room

Port Area and Usage

Total Area:	**1,350 ha**
of which: Land	1,150 ha
Water area (21 docks)	over 180 ha
for Seagoing Vessels	
Quay walls	37.0 km
Number of berths	over 700

Freight Transport and Passenger and Ship Traffic

Freight Transport (MMRT)

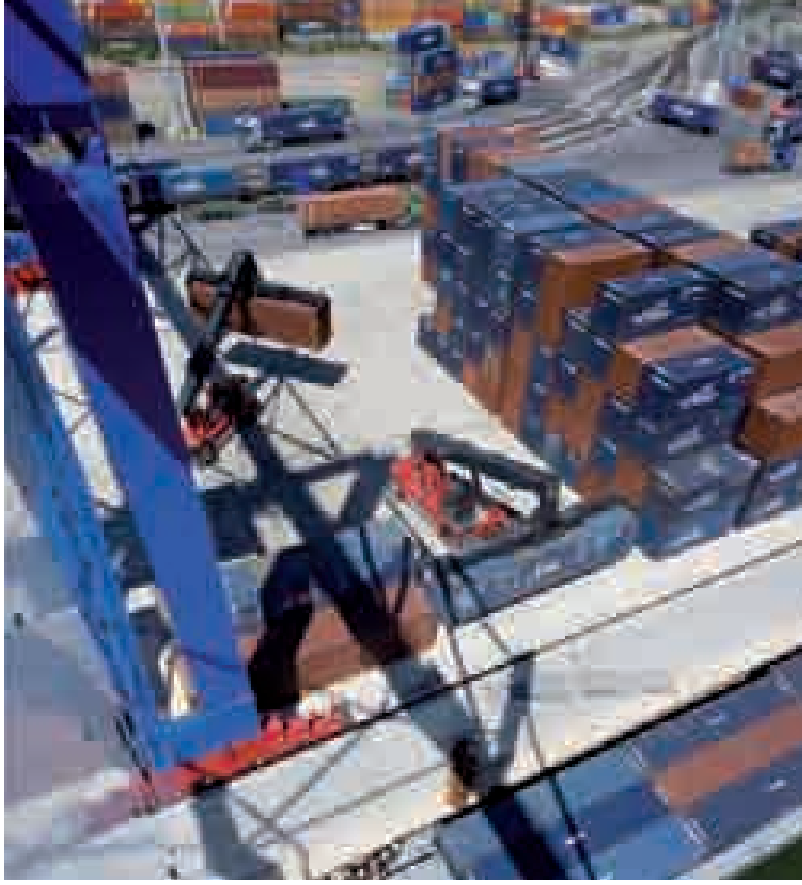
	Ship	Rail	Road
2008	51.0	28.2	39.9
2009	34.5	18.3	29.9

Ship Traffic, Inland Ships (Arrivals)

2008	20,000
2009	20,000

Trains (Arrivals)

2008	16,000
2009	18,500



Duisport is the world's largest inland port. It is located at the crossroads of the Rhine, Europe's most heavily travelled river, and the Ruhr, which winds through western Germany's traditional industrial heartland. It is a feeder inland port receiving the massive volume of goods passing through the major ports of the Benelux nations into Germany, and it is also a major seaward transit point for German exports.

Over 100 million tons of cargo are turned over by road, rail and ship at Duisburg, making it a major European logistics hub. This includes 1.8 million TEUs in container traffic plus large quantities of steel, imported coal, mineral oils and chemicals.

Duisport's intermodal capability is underscored by the sheer numbers: approximately 20,000 ships and 16,000 trains move goods through the port; over 350 rail connections to 80 European destinations originate from the combined traffic hub of Duisburg.

300+ globally active transport and logistics providers are active on site at Duisport offering expertise in the development and optimization of supply chain management, rail transport management, packaging logistics and a whole raft of related services.

Duisburg: Duisport's Combined Water and Rail Links

Sources: www.duisport.de; author's illustration

Photo: Duisport

HAMBURG

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Services
HWF is the Business Development Corporation of the Free and Hanseatic City of Hamburg and partner as well as centre contact point for enterprises who set up, expand or reconstruct in Hamburg. Especially companies from other countries are supported by HWF during the process of setting-up a company at the business location of Hamburg. In this connection we are cooperating closely with the HWF-representatives worldwide. HWF also covers the function of a pilot observing the concerns of economics towards administration and institutions. HWF is in close cooperation with the Hamburg cluster initiatives for logistics, aviation, MITT as well as renewable energies and life sciences. The service is confidentially, free of charge and without obligation.

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Services
HHM as a private association takes care of marketing activities for the Port of Hamburg, the neighboring ports, and for their numerous member companies. With varied activities at home and abroad it helps strengthen their competitive position.

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Services
The Logistics Initiative Hamburg serves as an industry network. To further expand Hamburg's role as the leading logistics hub in Northern Europe, the Hamburg State Ministry for Economic and Labour Affairs and companies and institutions from Hamburg established Logistics Initiative Hamburg in 2006. The registered association "Logistik-Initiative Hamburg e.V." was founded by representatives of the business community to support and shape the Logistics Initiative. With more than 450 active members from the logistics industry and related sectors, this powerful network is the largest of its kind.

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PORTS OF BREMEN/BREMERHAVEN

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Services
Bremeninvest is the central services point of contact for international investors in Bremen.
We offer support for company set up; find land, property, industrial and commercial real estate; help with visa approval services for managing directors and put you into contact with logistics services providers.

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Services
bremenports GmbH & Co. KG is the port marketing agency of Germany's second largest port group. bremenports is responsible for all port areas on behalf of the Bremen municipal authorities. Additionally, bremenports offers advisory based on consultation with a global clientele of public and private bodies. bremenports offers also professional consulting and training services.

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Services
Association of over 220 member companies representing over 25,000 port-related jobs. A strong partner for networking in the port traffic industry for over 60 years.

Service Providers

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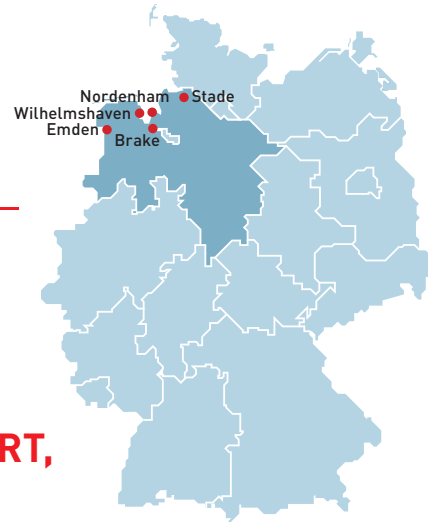

DEEP-WATER PORT WILHELMSHAVEN, JADEWESERPORT, BRAKE SEAPORT, PORT OF STADE, EMDEN SEAPORT, NORDENHAM SEAPORT, CUXHAVEN SEAPORT

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Investment Promotion
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Services

NGlobal is the central economic development agency for the State of Niedersachsen. NGlobal markets Niedersachsen as an investment location and attracts new companies to the state, encourages inter-enterprise collaboration and joint ventures. The agency supports export-orientated companies, in particular small and medium-sized businesses, based in Niedersachsen with comprehensive foreign trade information and services. Moreover, NGlobal promotes Niedersachsen abroad as the leading business Location. In order to intensify business contacts with foreign countries, NGlobal and the state of Niedersachsen have set up representative offices and business partners nearly worldwide.

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Services

Niedersachsen Ports is one of Germany's largest public port operators. Maritime services are our business. We are partners to our clients, who provide their own broad palette of services on their end. That includes – among others – the handling of goods of all kinds, the processing of goods right before or following ocean transport, and all manner of services related to ship traffic. Aside from the larger ports of Brake, Cuxhaven, Emden, Stade and Wilhelmshaven, seven island service ports as well as a regional port belong to the port system of Niedersachsen Ports.

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Services

The Seaports of Niedersachsen GmbH is a port marketing organization representing the interests of the nine ports of Niedersachsen to business, political leaders and the press. Seaports of Niedersachsen employs a targeted marketing strategy to position the nine port locations as one of the most significant German port group in the domestic and international markets. The ports' main areas of activity are in the handling and warehousing of breakbulk, liquid and solid bulk, general cargo, automobiles, ro/ro, wind energy plants and components, containers and reefer cargo.

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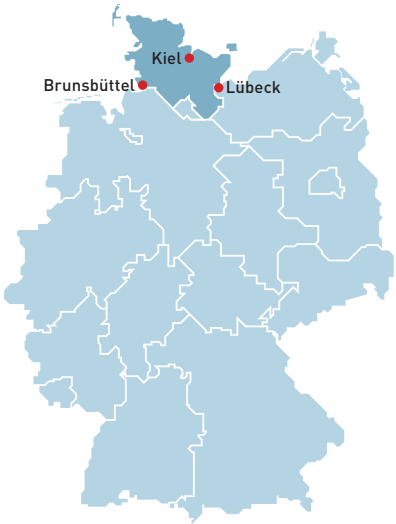

BRUNSBÜTTEL SEAPORT, PORT OF LÜBECK, PORT OF KIEL

Schleswig-Holstein is a logistics location of great strategic significance due to the advantages that arise from its ideal geographic position. The dynamic development of the southwest Baltic Sea region only strengthens Schleswig-Holstein's vital transit role as a hinge linking the Baltic region to Western Europe.

The completion of the Fehrmarn crossing between Germany and Denmark will provide the region with even more of a tailwind. A multitude of varying traffic and transport possibilities combined with efficient land use and future-centric development put Schleswig-Holstein in pole position within Germany's logistics landscape.

Here, seaports have undergone the transformation into highly specialized logistics service providers, taking on an indispensible role in the German economy. Kiel, Puttgarden, Brunsbüttel and Lübeck are the higher-profile ports, functioning as hubs of German trade with Scandinavia, Russia and throughout the Baltics.

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Photo: Baltic Rail Gate, Travemünde

ROSTOCK SEAPORT, PORT OF SASSNITZ/MUKRAN, WISMAR SEAPORT

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Services
Invest in Mecklenburg-Vorpommern is the economic development agency for the German State of Mecklenburg-Vorpommern. As a one stop agency, we are the partner for all companies that want to establish operations in Mecklenburg-Vorpommern. As the central contact point, we represent a company's interests toward administrations and state institutions.

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Services
The association is an important instrument for an effective stabilization of the branch in our federal state. The members come from different areas of economy, alliances, chamber of industry and commerce as well as sciences and politics. The association understands itself as source of inspiration for logistic innovations.

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Photo: Port of Sassnitz/Mukran

DUISBURG INLAND PORT

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marfeld@nrwinvest.com
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Services
Central contact point for foreign corporate investments in North Rhine-Westphalia. NRW.INVEST offers to potential investors a one-stop service ranging from information on locations to organizing and supporting negotiations and approval procedures.

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Services
Logistik.NRW bundles all the strengths in the logistics industry in North Rhine-Westphalia in order to consolidate its position as the world's leading logistics location. The goals here are to increase the competitiveness of the industry, to market NRW as a logistics location and to secure jobs.

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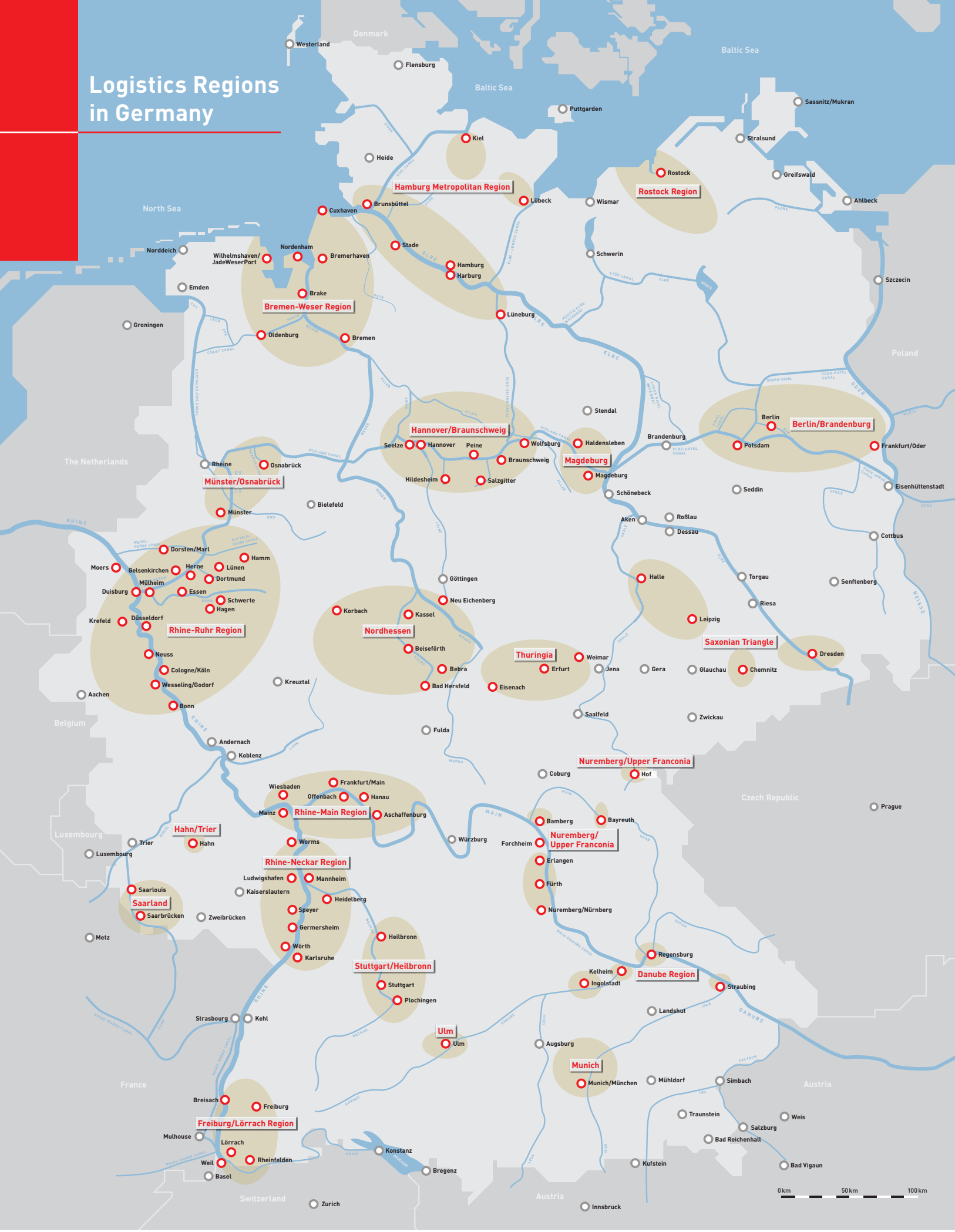
Services
Holding and management company of the Port of Duisburg. The **duisport Group** offers full service packages in the areas of infrastructure and superstructure for the Port and logistics location, including relocation management. Its subsidiaries provide logistic services, rail freight services, facilities management and packing logistics.

Logistics Regions in Germany



Bremen-Weser Region

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Photo: Bremenports GmbH & Co. KG, Wolfhard Scheer

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Photo: Lübecker Hafen-Gesellschaft mbH

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Photo: Niedersachsen Ports GmbH & Co. KG

Impulses for Maritime Logistics

The ISL – Institute of Shipping Economics and Logistics was founded in Bremen in 1954. By combining tradition with modern science, we have since positioned ourselves as one of Europe's leading institutes in the area of maritime research, consulting and knowledge transfer.

Today, around 60 employees at our offices in Bremen and Bremerhaven handle projects from all over the world in interdisciplinary teams. Whether in China and South-East Asia, Saudi Arabia, Dubai, Russia or the Ukraine, whether logistics systems, maritime economics and transport or information logistics are concerned – we ensure that innovative ideas are developed into solutions with practical applicability on behalf of our project partners from the public and private sector, both on a national and international level.

The department of Logistics Systems seizes suggestions concerning the future of logistics. The focal points of the work are in the areas of inter-modality, regional logistics, sustainable systems in production and logistics as well as knowledge management. The section of Maritime Economics and Transport consults politics and economy on the basis of analyses and forecasts of influencing factors and cause-effect relationships in the field of shipping, ports and shipbuilding. Furthermore, the ISL experts analyse and develop quantitative approaches to transport modeling. The department of Information Logistics offers competent services, products and innovative research via studies and R&D projects in the field of information and simulation technologies for the transport area. Therefore the knowledge of transport and logistical processes is combined with efficient project management and IT experience. Two special competence areas have been established in Bremerhaven: Optimisation, simulation and 3D-visualisation of terminals, networks and corridors as well as Auto-ID and security in container transport.

The ISL InfoLine and the ISL Information Centre complete our information service spectrum. The ISL InfoLine provides numerous proprietary publications, which are available for viewing on the ISL's online portal (www.infoline.isl.org). Key publications are the ISL Shipping Statistics and Market Review (SSMR) and the ISL Shipping Statistics Yearbook (SSYB). The ISL Information Centre is one of the leading European centres for maritime information and documentation and offers rapid, comprehensive and professional information services relating to industries, markets and companies in the fields of shipping economics, transportation and logistics. The comprehensive supply of information is assured by the ISL SEABASE literature database with over 100,000 documents and the reference library in Bremen with around 125,000 volumes and 750 up-to-date journals and series.

We see ourselves as a knowledge hub and initiator for shipping economics and maritime logistics in Germany and Europe. We emphasise quality in research and consulting for practical applicability in order to develop and oversee innovations geared towards the market environment and new scientific topics, both today and tomorrow.

Contact

ISL
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Economics and Logistics

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Strategy → **Evaluation** → **Decision & Investment**

Project Management Assistance

Analyzing business opportunities	Discussion of market entry strategies	Identifying possible project partners	Coordination and supporting negotiations with local authorities	Handover to regional development agency

Location Consulting/Site Evaluation

Identification of project-specific location factors	Cost factor analysis	Pre-selection of sites	Organization of site visits	Supporting final site decision

Support Services

Identification of relevant tax and legal issues	Consulting on project related financing and incentive issues	Organization of meetings with legal advisors and financial partners	Supporting administrative affairs	Accompanying incentives application and establishment formalities

Germany Trade & Invest's teams of industry experts will assist you in setting up your operations in Germany. We support your project management activities from the earliest stages of your expansion strategy.

We provide you with all of the industry information you need – covering everything from key markets and related supply and application sectors to the R&D landscape. Foreign companies profit from our rich experience in identifying the business locations which best meet their specific investment criteria.

We help turn your requirements into concrete investment site proposals, providing consulting services to ensure you make the right location decision. We coordinate site visits, meetings with potential partners, universities, and other institutes active in the industry.

Our team of consultants is at hand to provide you with the relevant background information on Germany's tax and legal system, industry regulations, and the domestic labor market.

Germany Trade & Invest's experts help you create the appropriate financial package for your investment and put you in contact with suitable financial partners.

Incentives specialists provide you with detailed information about available incentives, support you with the application process, and arrange contacts with local economic development corporations.

All of our investor-related services are treated with the utmost confidentiality and provided free of charge.

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Germany Trade & Invest is the foreign trade and inward investment agency of the Federal Republic of Germany. The organization advises and supports foreign companies seeking to expand into the German market, and assists companies established in Germany looking to enter foreign markets.

All inquiries relating to Germany as a business location are treated confidentially.
All investment services and related publications are free of charge.

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Poland

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Puttgarden
Lübeck
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Sassnitz/Mukran
Greifswald
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Konstanz
Bregenz
Zurich

0 km 50 km 100 km

February 2011

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