



European ShortSea Network

Editorial

NR 12 - MAY 2004

Dear reader,

"Shortsea rounds the cape of 100 million tonnes!"
Surely you haven't missed that headline in the newspapers, but we nevertheless want to draw your attention to it once more in this newsletter.

Against the current economic trend, this is once again a remarkable result, which shows that, more and more, the way to shortsea is being discovered and used. This is, indeed, a boost for the promotion office, which certainly has pulled its weight.

In the annual report of the promotion office, which has become available recently, you will find an overview of the efforts made over the past year.

Your reactions and suggestions are always welcome, by the way!

Happy reading!

Ir. Ilse Hoet

Chair SSS working group



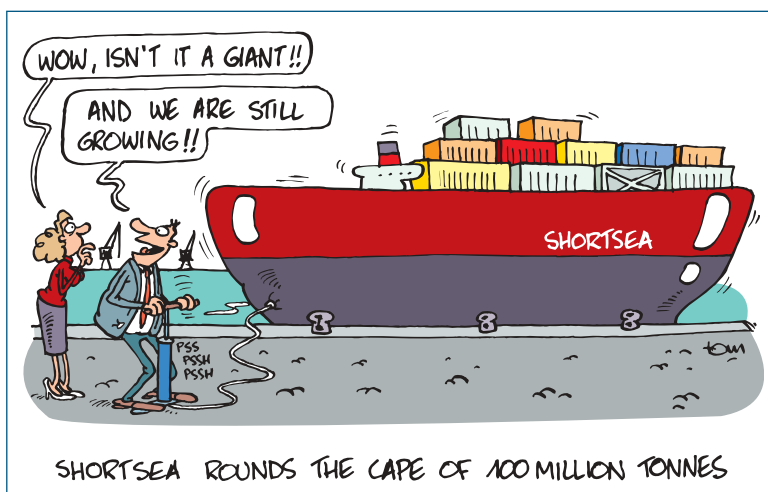
Shortsea rounds the cape of 100 million tonnes!

For the first time since statistics are kept, shortsea shipping in our country has rounded the cape of 100 million tonnes of cargo. Both as far as absolute figures and growth percentages are concerned, the increase of shortsea traffic was larger in 2003 than in previous years.

The very fast growth of shortsea shipping helps to limit the inconveniences on our roads. A coaster sailing from Antwerp or Zeebrugge to Bordeaux, Barcelona or Copenhagen, keeps a lot of trucks off the road. In combination with inland navigation all large industrial centres of Europe are accessible by shortsea shipping.

In 2003 not less than 105 million tonnes of goods were shipped from the 4 Flemish ports via shortsea (more than 51% of the total volume), an increase of more than 18% compared to 1999.

In 2003, the strongest growth of shortsea shipping was recorded in Gent with an increase of 25.3%. In Oostende the traffic went up with 15.6% and in Antwerp there was an additional increase of a full 10.7%. Zeebrugge witnessed a spin, due to certain shifts to Vlissingen and the discontinuation of the P&O services between Zeebrugge and Dover. However, Zeebrugge did record an increase in the ro-ro traffic to, a. o. Turkey.



The relative importance of shortsea shipping differs depending on the port concerned. The importance is the greatest in Oostende (99.6% of all traffic) and in Brugge-Zeebrugge (78.4%). In Gent half of all port traffic (49.8%) is shortsea. In Antwerp it amounts to 43.3%.

The importance of shortsea shipping on our big canals continues to diminish somewhat. On the Albert Canal the shortsea volume attained 567,914 tonnes, on the Zeekanaal 870,798 tonnes. An unfavourable balance of costs and structural bottlenecks, including in particular the available headroom under some bridges, remain handicaps.

This conclusion, in a period of growth recession, proves that structural shifts in favour of shortsea shipping, are underway, that a structural increase is manifesting itself and that shippers increasingly opt for durable transport.

Ports play the leading part in SSS

Port	SSS 1999	SSS 2000	SSS 2001	SSS 2002	SSS 2003	Total volume handled in 2003 (tonnes)	% SSS of total traffic
Antwerpen	49 487 501	57 343 672	57 642 997	55 894 987	61 866 500	142 874 512	43,3
Gent	9 127 900	9 107 175	8 851 520	9 359 794	11 727 895	23 540 638	49,8
Oostende	3 108 127	4 307 026	4 796 050	6 217 805	7 189 365	7 218 939	99,6
Brugge-Zeebrugge	26 798 148	27 836 495	25 543 594	26 330 371	23 970 021	30 569 974	78,4
Total	88 521 676	98 594 368	96 834 161	97 802 957	104 753 781	204 204 063	51,3

ACL Sweden enters the shortsea ro-ro market

ACL Sweden embarks on the shortsea ro-ro market by extending its North Atlantic service. From now on, Swedish shippers can transport their cargo to Belgium and the United Kingdom with ACL.

The weekly service starts in Göteborg, subsequently calls in at Antwerp and finally moors in Liverpool (UK) two days later. Although the cargo consists mainly of ro-ro goods, the ships also handle containers and/or project goods or cargo with exceptional dimensions.

If you wish to learn more about this service, then contact:

ACL Belgium (Atlantic Container Line)

Cassiersstraat 19

B-2060 Antwerpen

Tel.: +32-3-221 20 50

Fax: +32-3-226 26 54

www.acl.se

Contact: Vincent Vermeulen – vvermeulen@aclcargo.com



ACL ro-ro/container vessel "Atlantic Compass" by kind courtesy of ACL Belgium



Quote

Philip Van Gestel - CEO Hesse-Noord Natie about Antwerp in the magazine 'Ondernemers - December 2003':

"We have a need for solid co-operation with the other Flemish maritime ports, to play the right cards and to develop shortsea traffic."

Companies on the radar



Appeal

Is there something innovative you would like the world to know? Or are you contributing to the relief of our European roads by using shortsea? We'll be glad to listen to your story and put it in the spotlight in our newsletter.

Promotion Shortsea Shipping gladly offers the opportunity to any company or organisation to appear in this section, without engagement and in a very simple way. The only condition is, that your message must have some news value or contain a testimony concerning shortsea shipping.

Send your message, testimony or invitation via e-mail to shortseashipping@sssbe.com or contact us by phone (tel.: +32-3-202 05 20).

In tow...

Do you know someone who would like to testify about his/her experience with shortsea shipping? Then invite that person for a talk via shortseashipping@sssbe.com. Our editorial team is all ears!

Promotion Shortsea Shipping's participation in events

SITL 2004

As in 2002, we took part in the international SITL trade fair in Paris. This well-known transport show took place in the 'Parc des Expositions' in Paris (9-12 March 2004).

The Shortsea Promotion Office Flanders was even present in a double capacity: on the joint stand of the 4 Flemish ports, Promotion Inland Waterways Flanders and Export Flanders, our Flemish 'roots' were promoted in every possible way.

Shortsea, however, didn't present itself only from a Flemish point of view: ESN was also present. The different member countries, each of which had invited the national and international press, had formed a single contact point for all market players, the main objective being to explain the functioning of the European Network.



With the Port of Zeebrugge on a mission to London (4-5 March)

Together with the meanwhile regular heterogeneous group from Zeebrugge, we reached the English shore after a short trip from Calais to Dover. We then were accompanied to the Flemish House, where we were welcomed in a very pleasant and informal way by the manager, Nic Vandermarliere, and the governor of West Flanders, Paul Breyne. Amongst the guests were predominantly important (shortsea) shippers and British top executives.

The next day the event stayed well on course in the London Docklands, where Joachim Coens, chairman of 'Maatschappij van de Brugse Zeevaartinrichtingen' (MBZ), announced important extension works in the Albert II docks, not only to meet the expected increase of ro-ro activities to, amongst others, Turkey, but also to cater for the ever increasing container traffic.

In Zeebrugge, the shortsea traffic represented 78.4% of the total tonnage handled in 2003. Important shortsea players for that coastal port are Cobelfret, Dart Line, Finnlines, K-Line, P&O Ferries, Superfast Ferries, UECC and Wallenius Wilhelmsen.

Taiex Vilnius: SPC Lithuania (4-5 March)

At the request of the European Commission the Flemish Promotion Office has made a presentation of its activities in Vilnius before, amongst others, representatives of the ministries and the administration. The aspect of networking within the European Shortsea Network was also an aspect of the discussion. The Shortsea Promotion Centre Lithuania has already been created in principle, but as yet it is not quite clear how it will be financed. Meanwhile, the interest in shortsea activities through the port of Klaipeda is certainly there.

Gent Harbour Day: Lille (26 March)

The Flemish Shortsea Promotion Office has participated in the Gent Harbour Day in Lille. The alternation of port introductions and the presentation of different companies appeared to be pretty successful. The Flemish Promotion Office discussed the role of shortsea in general and specific figures for Gent in particular; in 2003 11.7 million tonnes of SSS was handled there, which amounted to almost 50% of the total tonnage handled.

During a 'walking lunch' there was ample occasion to meet new contacts. The event appealed to some 50 French prospects.

Calendar of events

- **Seminar 'Motorways of the Sea'**
in Rotterdam:
10 May 2004
- **Participation to the ro-ro conference**
in Göteborg:
25-27 May 2004
- **Oostende at Anchor**
28-31 May 2004
(Are you Waterproof-campaign)
- **Antwerp Tall Ships' Race**
21-24 July 2004
(Are you Waterproof-campaign)

ESN's annual report soon on the ESN website

Since the start of the informal co-operation between the Shortsea Promotion Centres in 2001, ESN has managed to take remarkable steps towards the promotion and the development of shortsea shipping on both the European and the national level. The decision, made in 2001, to create ESN as an informal network of the existing Promotion Centres, was based on the fact that, on a purely national level, the promotion of international transport by shortsea was insufficient to meet the requirements of a cross-border transport mode.

The advice given and the market know-how offered to shippers and forwarding agents take shape in a number of projects the network is working on and which aim at gearing the radiuses of action of the road and shortsea players to one another. The growing strength and the increasing efficiency of the Shortsea Network coincides with a prominent focus on the role of shortsea shipping and, as far as the European Commission is concerned, its strategic importance on the European level.

You'll be able to read more about all this in ESN's annual report, which will be available as from May 2004 on our website www.shortsea.be or on the ESN website www.shortsea.info.

Country Special Denmark

This month we have published yet again a country special, in which we throw some light on the exports and imports between Denmark and Belgium. The introduction of the 'light' version of the German road tax LKW-Maut on 1 January 2005 is an excellent reason to (re)consider your transport chain to Denmark.

6,000 printed copies have been distributed among shippers, logistics providers, authorities, diplomats, journalists and others.

You can find other country specials of our series on our website www.shortsea.be in the section 'General Info/Publications'.

The following country specials are already available: Finland, Greece, Norway/Sweden, Spain/Portugal and Turkey. In most of those countries the shortsea business is witnessing an enormous evolution.



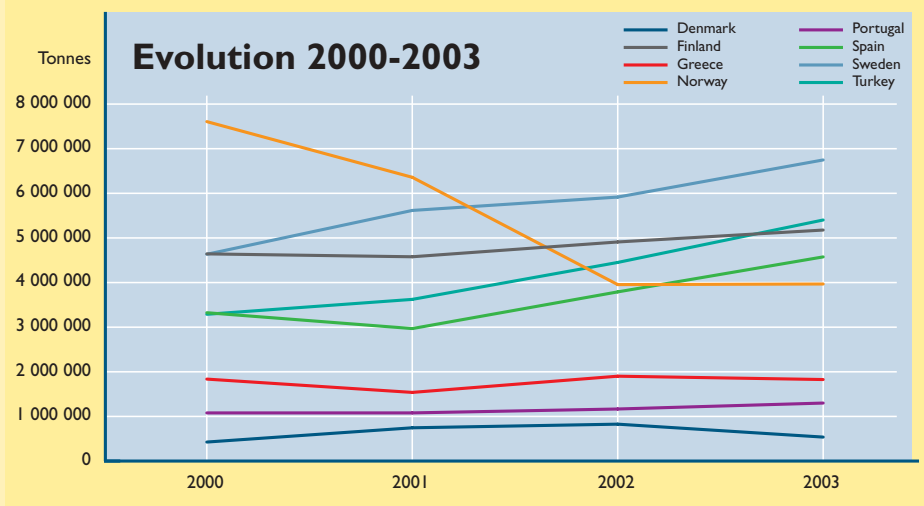
Synergy with inland navigation

Companies increasingly opt for the alternative transport mode over water

The production unit of Atlas Copco in Wilrijk near Antwerp is shipping 15 containers a day via the inland TCT Terminal in Willebroek, also close to Antwerp, where the containers are transferred onto, amongst others, shortsea vessels.

The availability of an environmentally friendly alternative for road haulage was one of the decisive factors. The planned works on the Antwerp ring-road were the immediate cause for choosing the waterways (via an inland terminal) for the delivery to the port of Antwerp. Other elements were the lower transport costs and the availability of containers at the Willebroek terminal.

The empty containers are shipped back to Willebroek, where they are stored on the quay.



Total tonnage handled in the 4 Flemish ports (Import + Export)

© Mike Louagie



Storage of line containers at inland terminals

To promote intermodal transport and in order to transport cargo to and from the Flemish Ports via the waterways, it is important that the empty equipment of the shipping companies is also available at the inland terminals.

There's no point to it if a shipper in Limburg first has to pick up empty containers in one of our ports, to drive back, to load them and only then be able to use an inland terminal for the transport to the ports. Many useless shifting can be avoided by storing containers at the inland terminals.

A number of (shortsea) shipping companies have already realized that. Forwarders can do their mite here by opting for or insisting, when booking a cargo, on the availability of empty containers at the terminals. Haulage firms can also play their part by focussing on transports to and from the terminals.

Annual Report Promotie Shortsea Shipping Vlaanderen

The evaluation of our activities in 2003 is ready!

2003 was the first year of operation under our new three-year business plan.

The main accents reposed on four pillars:

1. to take and stimulate concrete initiatives, the so-called fieldwork;
2. to detect the bottlenecks that still hamper shortsea shipping and to take steps to solve them with the objective of improving the quality of shortsea shipping and rendering new shortsea regular services possible;
3. the development of a European dimension for shortsea shipping, with an emphasis on networking;
4. general promotion which is carried out on a permanent basis towards certain target groups, including the 'public at large'.

In general we can state that the notoriety of our Flemish Promotion Office has further increased in 2003 and that its positioning has become increasingly clear, not only towards shippers and logistics providers, but towards the general public also.

A not insignificant evolution, meanwhile, was that a number of road transport companies were looking for information on ro-ro opportunities, an obvious consequence of the increasing road congestion and of certain measures, such as the planned LKW-Maut and the works on the Antwerp ring-road.

A copy of the report can be found on our website www.shortsea.be (section General Info/Reports and Studies).



Messages

Publication of a new shortsea magazine

De Lloyd has started the publication of a new shortsea magazine. This monthly news summary will focus on the different developments concerning shortsea in the whole of Europe.

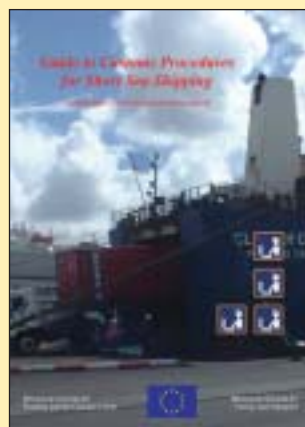
For additional information, please contact:

Paul Harding
Tel.: +32-3-206 88 66
pharding@lloyd.be
www.lloyd.be



New update of the Customs' Vademecum

For the newest update of the Customs' Vademecum, which has been available since January 2004, you can surf to our website www.shortsea.be under the section 'General Info/Reports and Studies'.



**Promotion Shortsea
Shipping Vlaanderen**

c/o Promotie Binnenvaart Vlaanderen

Antwerp

Verbindingsdok 13

Oostkaai bus 10

B-2000 Antwerp

Tel.: +32-3-202 05 20

Fax: +32-3-202 05 24

e-mail: shortseashipping@sssbe.com

website: www.shortsea.be

Hasselt

Kempische Kaai 57

B-3500 Hasselt