



Challenges and opportunities for ports and shipping in Europe

Transportevents Webinar, 5th November 2020

Hamburger Hafen und Logistik AG (HHLA) is a leading European port and logistics company, listed since 2007.

The City of Hamburg holds 68 % of shares in HHLA; the remaining 32 % are in free float.

The company's activity spans from the Port of Hamburg to many parts of Europe.



HHLA Overview



Container

- Container throughput
- Container-related services (e.g. storage, repair)

€799.7 million revenue*

€141.3 million EBIT*



Intermodal

- Container transport via rail and truck in the ports' hinterland
- Operation of inland terminals

€486.9 million revenue*

€99.2 million EBIT*



Logistics

- Specialist handling of dry bulk, break bulk, vehicles, fruit, etc.
- Consulting and training

€59.0 million revenue*

€2.5 million EBIT*



Real Estate

- DNA of HHLA and business card of the city
- Marketing of space in the Speicherstadt and Fischmarkt

€40.2 million revenue*

€16.5 million EBIT*

* 2019 figures

Increasing pressure on port operators



The face of globalisation is changing...



Container growth has largely come to an end...



Fewer and fewer customer with higher market power.....

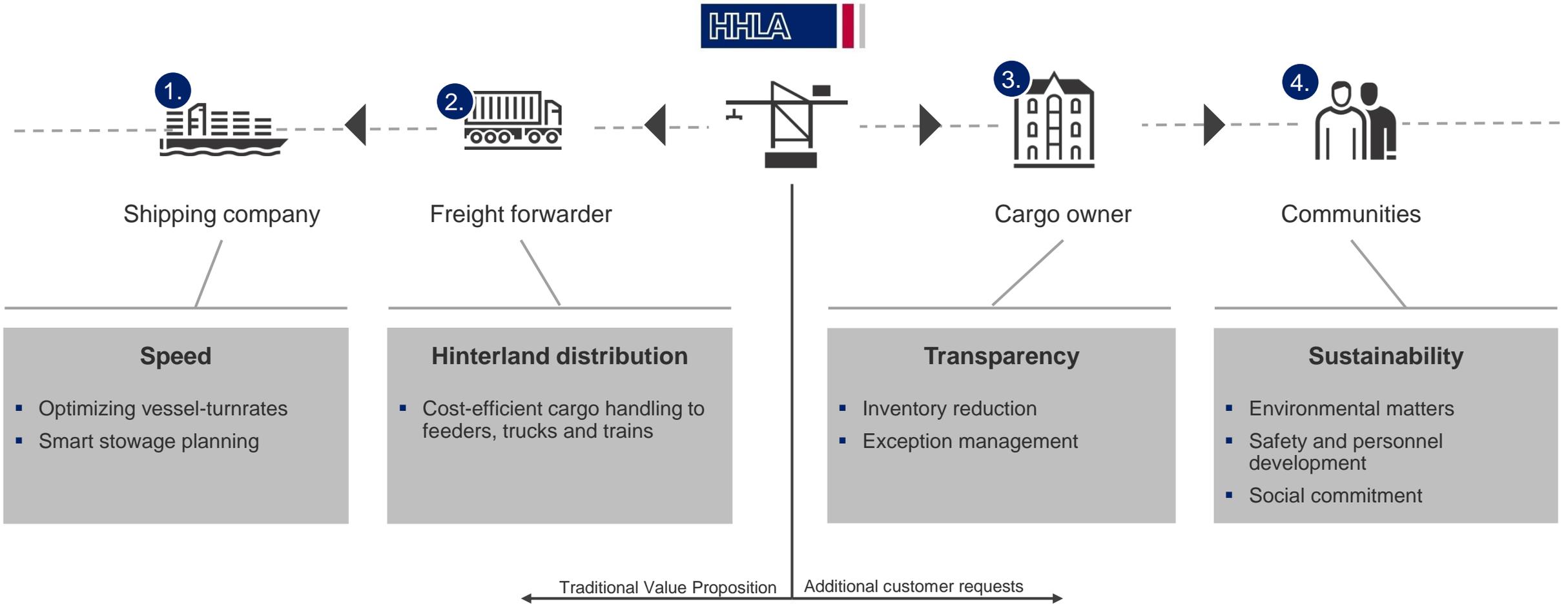


Volatile political and economic framework...

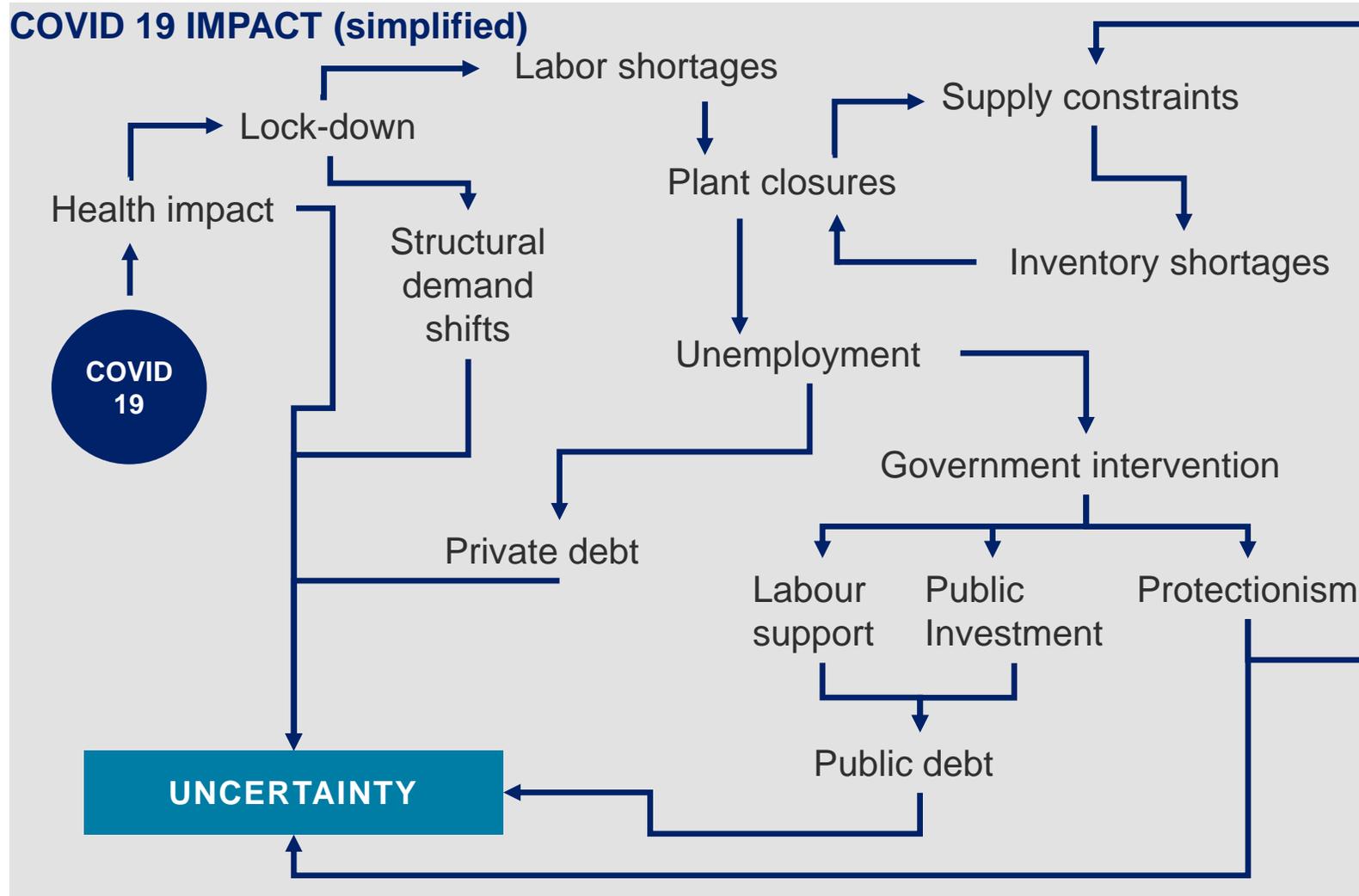


Increasing competition for port infrastructure...

Port and terminal customers increasingly demand additional services on top of traditional transport and logistics solutions



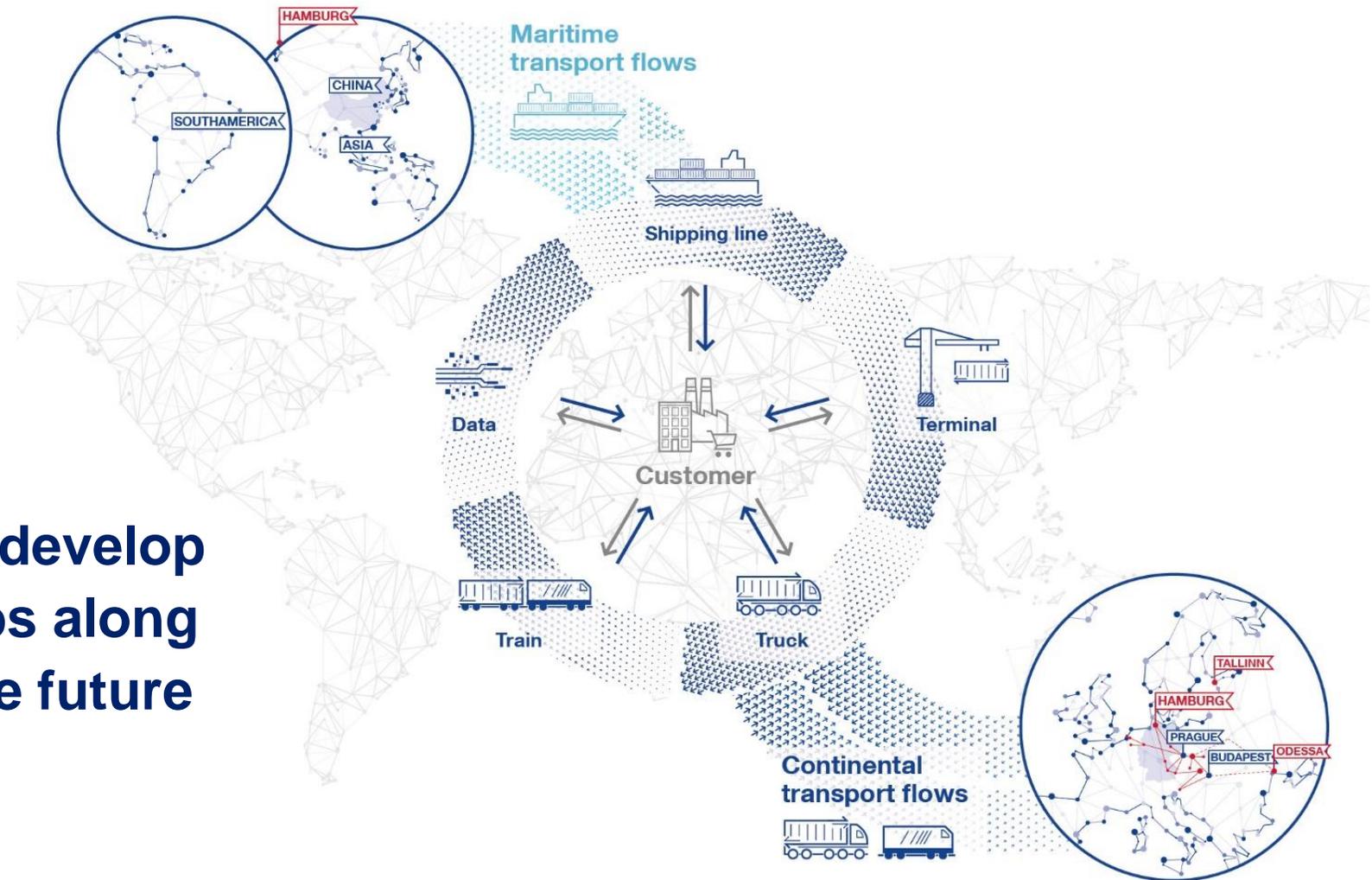
With COVID19, uncertainty on medium term development has strongly increased



Broader approach is key to maintaining and developing position of ports in the supply chain

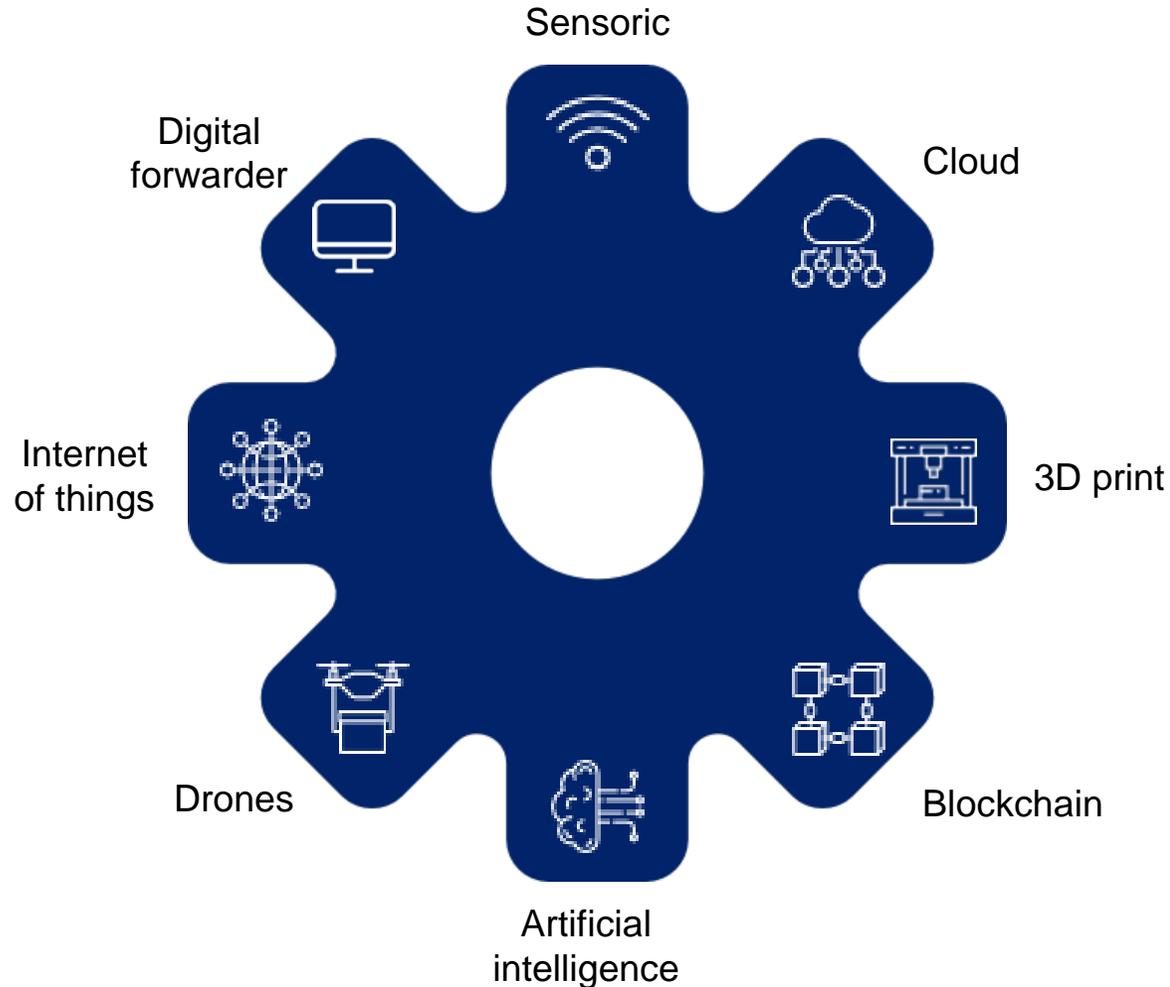
HHLA Mission:

With our customers, we develop logistical and digital hubs along the transport flows of the future



Digital technologies bring significant opportunities, but also threats

Selected technologies



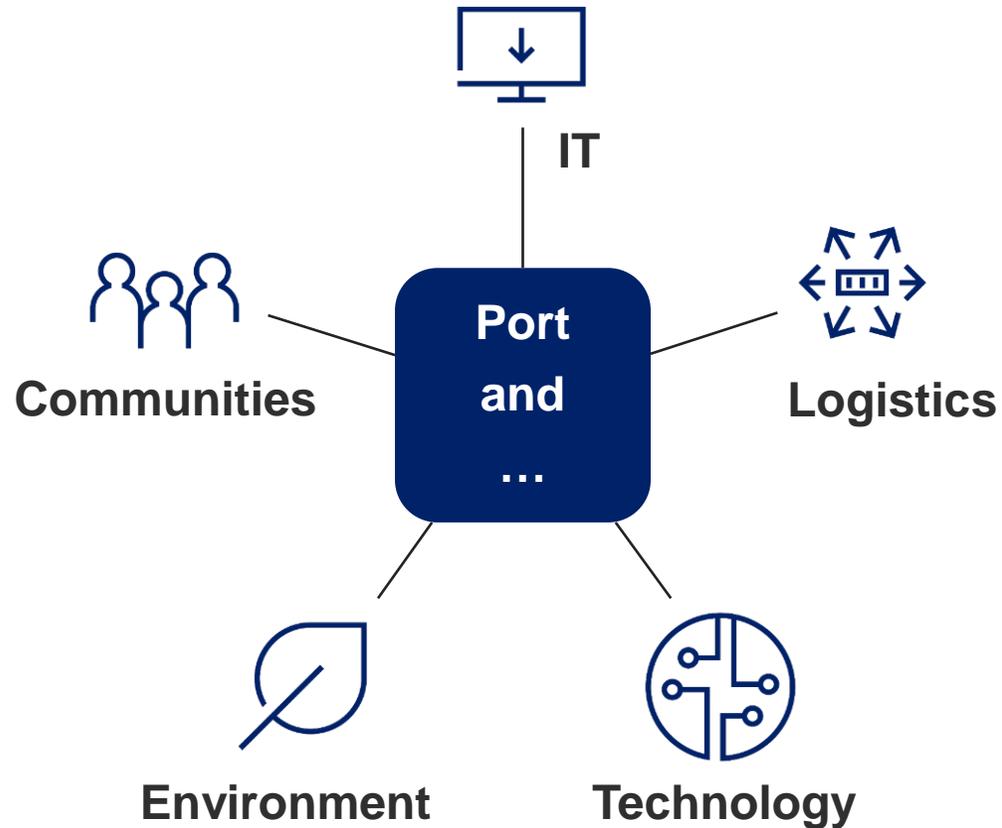
Digital technologies bring opportunities and threats

- New technologies have the potential to significantly
 - improve efficiency within individual companies
 - increase safety and sustainable operations
 - ease communication, data exchange and efficiency along entire value chains
 - change traditional production and logistics processes
 - disrupt existing business models
 - open up new fields of activities for innovative companies
- The pace of change continues to pick up
- The direction of this change is not always clear and consistent
- Implementation of new technologies poses challenges

**HHLA IS EMBRACING CHANGE
AND NEW TECHNOLOGIES**

Conclusion: Ports are well positioned to develop into innovation hubs

Port ecosystem



- Ports are locally and globally interconnected transport hubs with significant interfaces to the fields of IT, logistics, technology, environment and society.
- Port and terminals need to adapt to a changing external environment.
- Customer orientation, digitization and sustainability are major drivers for new solutions and services.
- Ports are well positioned to develop into innovation hubs, increasing their role from pure logistics providers to logistics innovators.
- HHLA has started to make its contribution...

Contact

Philip Sweens

Managing Director

HHLA International GmbH

Bei St. Annen 1

20457 Hamburg

+49 40 3088 3880

sweens@hlla.de

www.hlla.de

