



BEYOND PRODUCTIVITY

From Vessel Turnaround to Customer Retention

**How Operational Excellence Across the Terminal Value Chain Translates
into Customer Value and Sustainable Commercial Growth**

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From Familiar View To Reframed View

“Traditionally, we look at terminal efficiency through a set of operational KPIs, We measure crane productivity, vessel turnaround, yard occupancy, dwell time and gate performance. These indicators are important, but they are often managed separately.”

THE GAP
Operational KPI Customer Value

THE FAMILIAR VIEW

Terminal efficiency as an operational scorecard

Crane productivity • Yard occupancy • Dwell time • Gate turnaround • Berth waiting

THE REFRAMED VIEW

One continuous value chain:
vessel → berth → yard → gate → customer

Every operational metric is also a commercial signal.
The customer feels the **sum**, not the **part**.

A faster crane does not automatically mean a better customer experience.

Why?

Because the customer experiences the **entire terminal**, not an individual department.

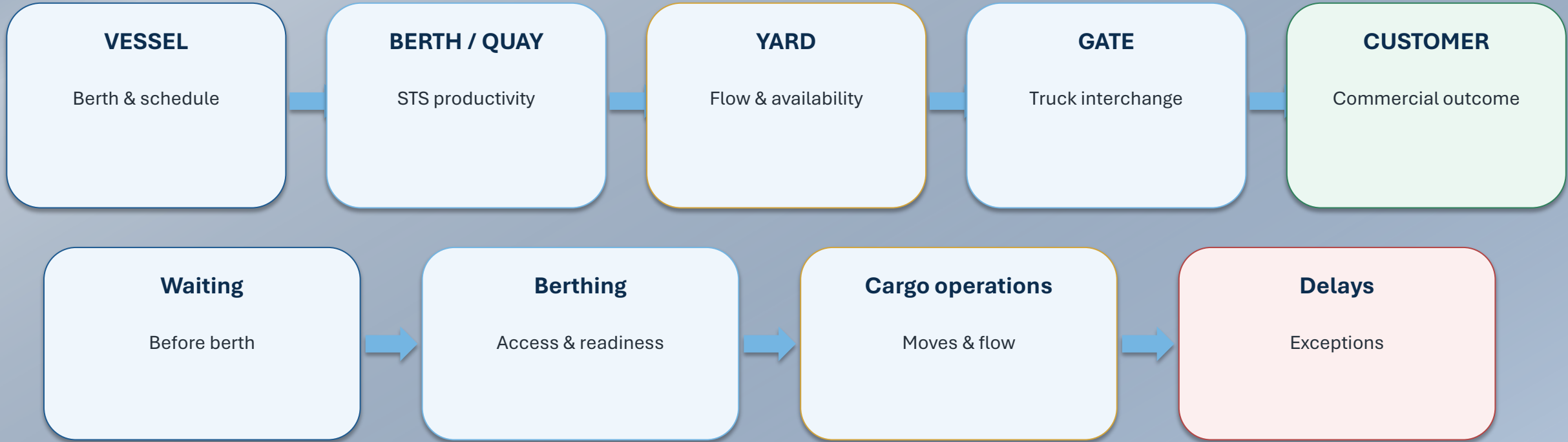
From Individual KPIs to One Customer Experience

VESSEL → BERTH → YARD → GATE → CUSTOMER

Commercial Outcomes: RETENTION • SHARE • NEW SERVICES • REVENUE

The Terminal Is One Integrated System

System performance > individual performance



What flows through every stage TIME • RELIABILITY • INFORMATION VISIBILITY • CUSTOMER COST

For a shipping line, vessel turnaround is more than an operational KPI — it is a commercial KPI.

The Real KPI: Total Vessel Turnaround Time

What does our operational performance mean to the Shipping Line?



COMMERCIAL OUTCOMES

RETENTION

Protect existing shipping-line services

EXPANSION

Increase calls, frequency & share of wallet

ACQUISITION

Attract new services & customers

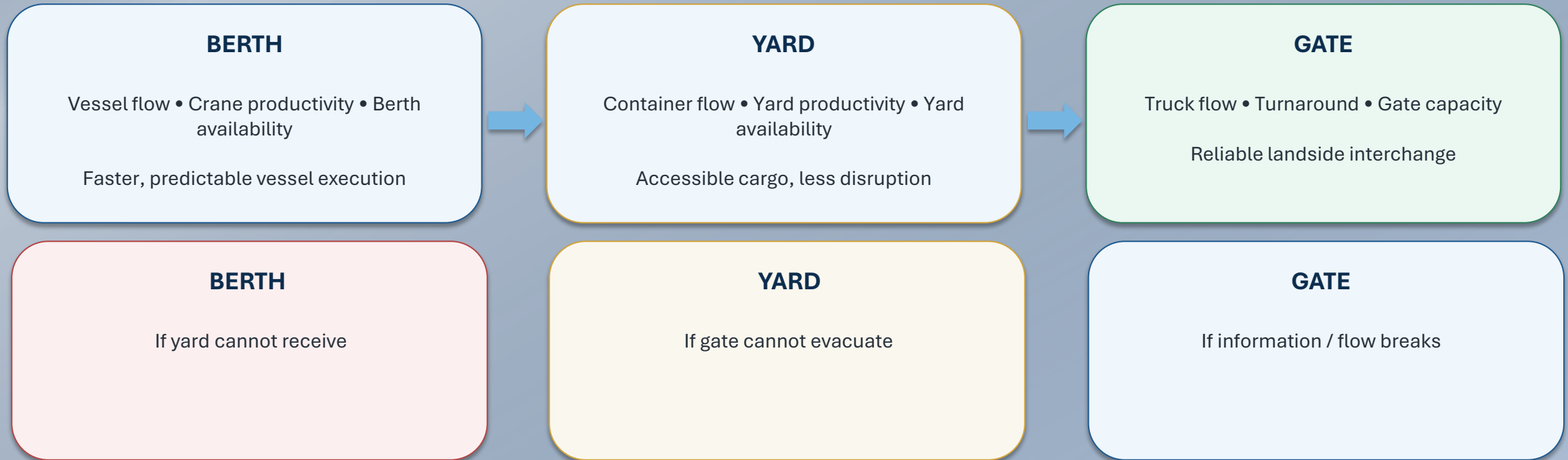
GROWTH

More TEU → Market Share → Revenue



The Berth–Yard–Gate Connection

**Customer experience is the output of the whole system.
Synchronization creates reliability.**



THE FASTEST CRANE

CANNOT FIX

A SLOW SYSTEM

Every Minute Matters

1 minute

×

vessel calls

×

network scale

= commercial value

SAVING TIME

PREDICTABILITY

CUSTOMER CONFIDENCE

RETENTION

When a shipping line can trust our turnaround time, our berth availability, our yard flow and our information, operational reliability becomes customer confidence.”

“And customer confidence is one of the foundations of a long-term relationship.”

“So, every minute we save is not only a minute saved in the terminal. It can become better planning, lower uncertainty, higher confidence and a stronger customer relationship.”

For a shipping line, time is a commercial asset.

From Productivity to Reliability

FAST

How fast can we operate?

CONSISTENT

How consistently can we deliver?

PREDICTABLE

Can the customer plan around us?

Customers buy predictability.

Peak productivity is impressive. Predictable performance protects the relationship.

For a Commercial Director, this is the key message: I am not only interested in how fast we operate. I am interested in whether the shipping line can trust the performance we deliver.

shipping lines do not plan their networks around our best day. They plan their networks around the performance can reliably expect

Technology: From Equipment to Intelligence

Technology creates value only when it improves the end-to-end flow.

AUTOMATION

Reduce manual friction

AI & DATA

Improve decisions

SMART EQUIPMENT

Increase capability

PREDICTIVE MAINTENANCE

Reduce disruption

REAL-TIME VISIBILITY

Increase confidence

If technology reduces vessel time, operational variability and uncertainty, it strengthens reliability. And reliability builds customer trust — which supports customer retention.”

So, for me, technology is not the destination, **Customer value is the destination**

That is how technology moves from an operational investment to a commercial advantage — and ultimately supports customer retention.”

What Does A Shipping Line Really Buy?

Not only handling moves.

Reliability

Predictable service

Berth availability

Schedule confidence

Vessel turnaround

Lower time in port

Yard & gate efficiency

End-to-end flow

Visibility

Information confidence

Responsiveness

Fast recovery

Commercial flexibility

Partnership

The product is the total experience.

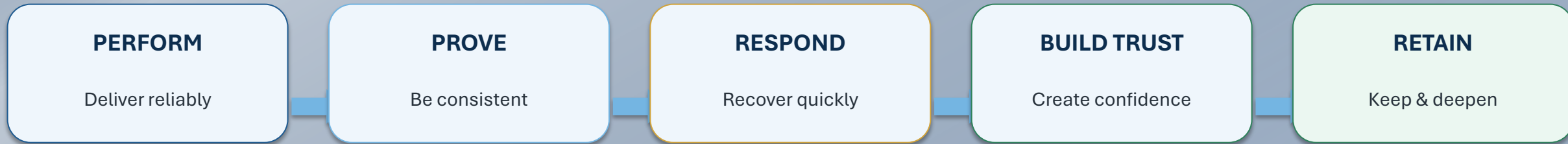
shipping lines are not looking only for a terminal operator... they are looking for a reliable long-term partner who can support their network and growth.”

Why Do Shipping Lines Stay?



Customer retention is built from operational confidence + commercial confidence.

Customer Retention Is Earned Voyage by Voyage



Every successful call builds confidence. Every disruption tests that confidence. And our ability to respond quickly can determine whether the customer stays and grows with us.”

We do not retain a shipping line by winning the contract, we retain it by earning its trust on every vessel call.”

Retention is not a one-time sales result. It is a repeated operational experience.

Protect the customer you already have → then grow with them.

From Customer Value to Shipping Line Growth



Retention protects the base. Expansion increases share of wallet. Acquisition wins the next customer.

Operational Excellence → Customer Value → Retention → Growth

A Mediterranean Success Story: Tanger Med 2024

CONTAINER THROUGHPUT

8.617M → 10.241M

Absolute increase **+1.624M**

YoY growth +18.8%

MARITIME CALLS

16,900 → 17,479

Absolute increase **+579**

YoY growth +3.42%

MEGA-SHIPS >290m

1,113 → 1,217

Absolute increase **+104**

YoY growth +9.34%

WHAT CHANGED — AND WHY IT MATTERS COMMERCIALY

- 1 More capacity & productivity** Higher throughput capability and stronger vessel-handling performance
- 2 More shipping-line confidence** The port links 2024 results to trust, productivity, new equipment and optimized maritime calls
- 3 Stronger platform for retention & growth** A larger operational platform can support existing services and additional calls/cargo

Operational capability → shipping-line confidence → stronger platform for retention, expansion and growth

Tanger Med: Different Scale, Same Commercial Logic

“So, the message is not simply growth. Growth is the outcome. The real foundation is operational performance, which builds customer confidence — and customer confidence supports retention, expansion and ultimately growth.”

It is the commercial logic: stronger capability, better flow and confidence can support more value per call and stronger customer relationships.

A Practical Commercial Terminal Framework

1 — OPERATIONAL KPIs



Vessel turnaround • Berth productivity • Yard • Gate • Equipment availability

2 — CUSTOMER KPIs



Reliability • Service quality • Satisfaction • Trust • Retention

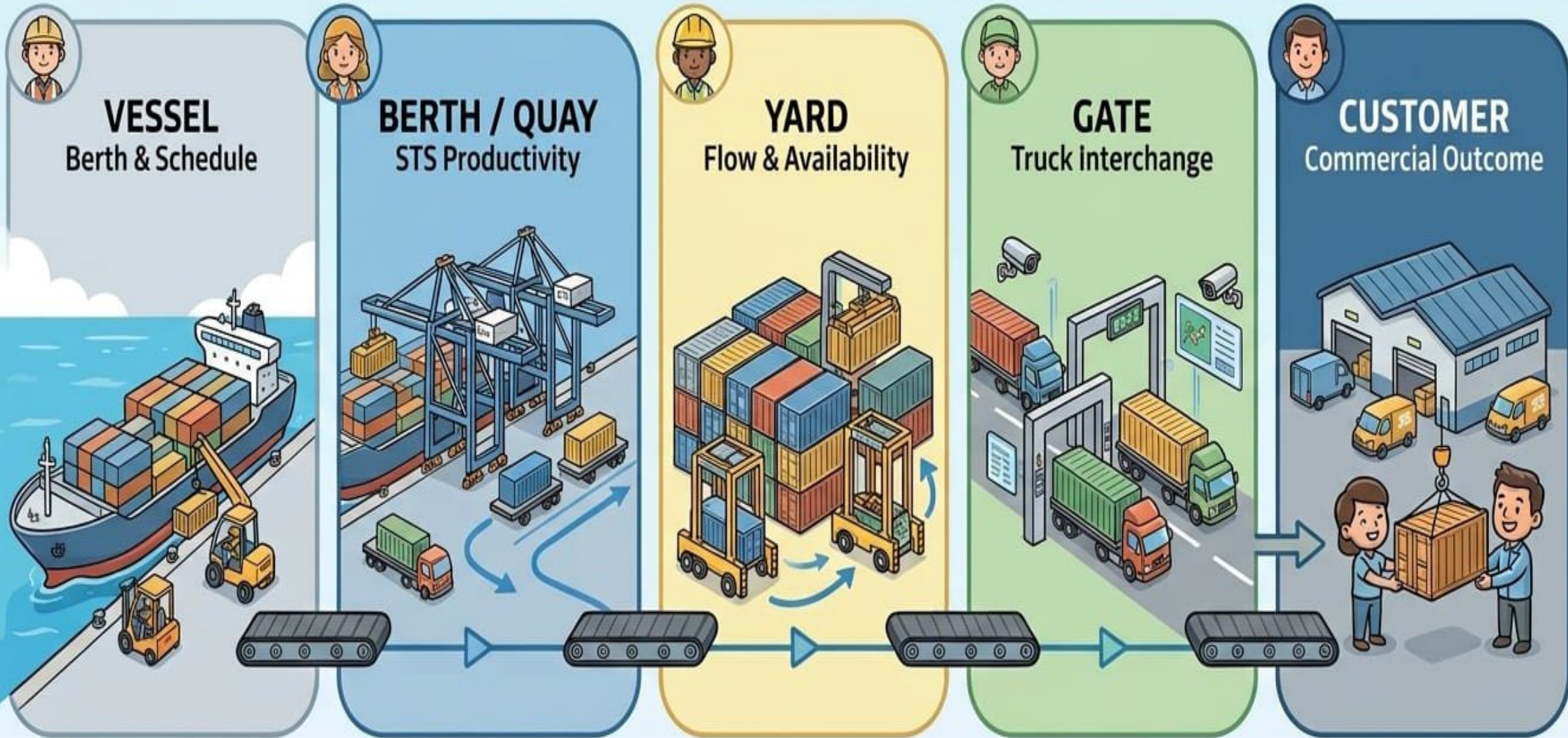
3 — COMMERCIAL KPIs



Service retention • Calls • New services • Throughput • Market share • Revenue

Do not stop at productivity: ask whether performance improved customer value — and whether customer value protected the relationship.

The Terminal Is One Integrated System



Strategic Takeaways

Treat the chain as one system

Shared operational + commercial outcomes

Measure reliability, not only peaks

Predictability protects customer confidence

Invest where the customer feels it

Prioritise delay, cost and visibility pain points

Make retention a managed process

Detect risk, recover quickly, deepen relationships

Align commercial and operations

One view of performance, customer impact and growth

THE COMMERCIAL MESSAGE

Operational Excellence



Reliability



Customer Trust



Customer Retention → Growth

Operational Excellence is Commercial Excellence.

EVERY MINUTE MATTERS.