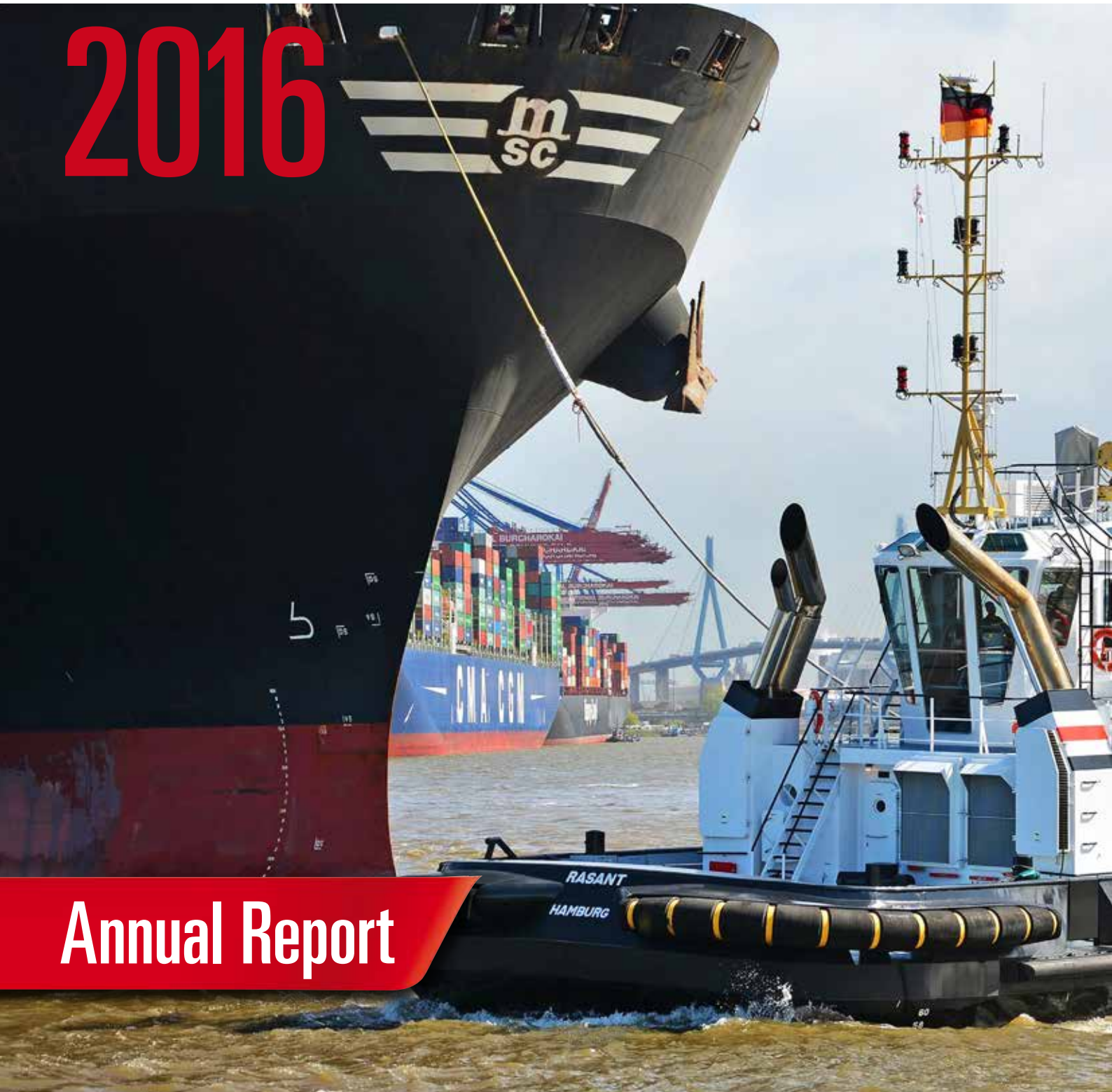


# PORT OF HAMBURG MARKETING

# 2016



## Annual Report



Port of Hamburg

MARKETING



# Port of Hamburg Marketing at a glance

Port of Hamburg Marketing was established in 1985. Today, as an international marketing organisation we are active in 14 locations further strengthening the Port of Hamburg's market position in international competition. With real commitment and very diverse activities we promote the attractiveness of the location and wide range of services provided in the Port of Hamburg. The ports in the Metropolitan Region have also found in us a strong partner for professional location marketing. Our members are particularly important to

us. We offer terminal operators, shipping lines, liner agents, rail companies, transport service providers, container packers, customs experts, basic and further training bodies, and many other companies professional marketing support with targeted communication, project and marketing activities, locally in Hamburg as well as all the important target markets. The activities are company and competitively neutral and in the common interest of the port location.

## A STRONG VOICE

**295**  
MEMBERS

More than 295 members are involved in the Port of Hamburg Marketing Association.

## ACTION IN THE MARKET PLACE

**12**  
LOCATIONS

12 locations worldwide strengthen the international position of the Port of Hamburg.

## BROAD RANGE OF EXPERTISE

**15**  
BUSINESS AREAS

Companies from over 15 fields are network their strengths in the marketing organisation.

## MARKET PRESENCE

**25**  
MARKETS

Port of Hamburg Marketing and its members are active in 25 markets: in the German hinterland as well as relevant international markets.

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# FROM THE EXECUTIVE BOARD, SUPERVISORY BOARD AND REPRESENTATIVES MEETING

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**Ingo Egloff**  
Joint CEO

Ingo Egloff has been a member of Port of Hamburg Marketing's Executive Board since 1 January 2014. As our Legal Adviser he supports the Chairman of the Supervisory Board on legal questions and is also responsible for Projects.

**Axel Mattern**  
Joint CEO

Axel Mattern has been a member of Port of Hamburg Marketing's Executive Board since 1 July 2011. He is responsible for Communication and Information.

The two members of the Executive Board are jointly responsible for HHM Marketing, Administration and Market Activities.



# ”INTERVIEW

## with the Executive Board

**In 2016 the Port of Hamburg achieved total throughput of 138.2 million tons, representing a slight upward trend once again. Appreciating the port's quality performance and its location at the heart of Northern Europe, port customers and shipowners rely on Hamburg. Yet its excellent reputation internationally requires untiring effort and professional location marketing – to which Port of Hamburg Marketing is committed through numerous activities in its leading core markets.**

**In this interview, Joint CEOs Ingo Egloff and Axel Mattern look back on 2016.**

**Ingo Egloff, what did the year bring for the Port of Hamburg?**

Ingo Egloff: We started 2016 in rather a difficult position. Seaborne cargo throughput in 2015 was down by 5.4 percent, or distinctly below the previous year's level, and the persistent crisis in the shipping sector was all-persuasive in 2016. Enormous surplus capacity, freight and charter rates at a record low and sluggish world trade caused worries for many players in the market. The insolvency of Hanjin, one of the largest container shipping companies, then brought home the extent of the crisis to everybody.

**Is Port of Hamburg Marketing also affected by the persisting crisis in shipping?**

Ingo Egloff: Many of our members – terminal operators, shipping companies, liner agents – come from the shipping industry. When these companies are struggling for survival, we naturally feel that too. On the other hand, it is especially in difficult times that many companies use our activities to present themselves on the market. That is also reflected in our total membership that was once again slightly up on the previous year.

**Let's revert to the Port of Hamburg's total throughput. Axel Mattern, was 2016 a positive year for the Port of Hamburg?**

Axel Mattern: It is gratifying that seaborne cargo throughput in the Port of Hamburg stabilized in 2016, with a gain of 0.3 percent again signalling an upward trend. We are proud of the record figure for seaport-hinterland transport by rail. High-performance access and dispersal corridors for freight transport by rail, truck and inland waterway craft are of crucial importance for keeping the port competitive in its diverse functional areas. It is therefore also regrettable that the judgement at the beginning of this year on the adjustment of the Elbe navigational channel should cause further time to be lost in its implementation.

**How did your customers react to the judgement on the dredging of the navigation channel?**

Axel Mattern: We have so far been in a position to clear the largest containerships and that will also apply in future. That's an important message for our clients and one that we are constantly putting over in our markets. Location advertising for the Port of Hamburg and its multiplicity of different services is one of our core tasks. Our Representative Offices in Europe and Asia are an essential link into our markets. In 2016, for example, we organized a visit by a delegation of Port of Hamburg businesses to China, Hamburg's top trading partner. That was an optimal opportunity for targeted presentation of Hamburg as a universal port, along with its salient features and the versatility of its services.

**Many customers are also looking to ports such as Antwerp and Rotterdam. Ingo Egloff, how is the Port of Hamburg positioning itself vis-à-vis the competition?**

Ingo Egloff: Service providers for freight handling, logistics and transport in Hamburg and the region offer performance of a tremendously high standard. Quality and speed of clearance, hinterland links, as well as the availability of an enormous variety of logistic services persuade the port's customers worldwide to route their freight via Hamburg. One concrete example here is that more than 200 freight trains reaching or leaving the Port of Hamburg daily put Hamburg in a clear lead when compared with other ports in Europe. That Hamburg is Europe's No. 1 Rail Port is not an advertising slogan, but a fact tremendously appreciated by its customers throughout the world.

**What part does Port of Hamburg Marketing play there?**

Ingo Egloff: The Port of Hamburg's clout rests on numerous companies throughout the Metropolitan Re-

gion. Our association networks their strengths into a single performance profile. To bring freight to Hamburg, it is essential that we communicate the Port of Hamburg's advantages as a traffic hub for global transport chains. In the transport business, especially, what matters are long-term performance and reliability. Last year we aimed for effective communication and partnership. We organized numerous events in Germany and other countries, participated in EU projects, presented the Port of Hamburg at trade fairs and in the media, and, and, and... This Annual Report provides a comprehensive overview of our various marketing activities in 2016. It will pay to read this!

**Were there any highlights?**

Axel Mattern: One highlight, for example, was the German-Latvian Maritime Forum in Riga, held for the first time in May 2016 and pure gain for organizers and participants alike. Many of our members requested a stronger presence in the Baltic region. The first consideration for us was to build up relations between Hamburg's port and transport industry, our members and customers and partners in the relevant market regions. That's why suggestions and comments from member companies on fresh projects and marketing activities at our Hamburg base, as well as in markets relevant for our work, are so important. We also welcome constructive criticism. That keeps us on our toes and boosts Hamburg as a port and logistics location.

**Gentlemen, have you anything else on your minds?**

Axel Mattern: We have to thank all the staff of Port of Hamburg Marketing most warmly for the work they have done. It's only their commitment that makes our global marketing of the Port of Hamburg successful.

Ingo Egloff: And special thanks too to the members of the association. Our members' commitment is truly indispensable for the Port of Hamburg's positive development.

*'Port of Hamburg Marketing has established itself as an association that is the envy of many other port locations.'*



## Report by the Chairman of the Supervisory Board

Ladies and Gentlemen,  
Dear members,

On behalf of the Supervisory Board I wish to brief you on our activities in 2016. During the year we discharged our duties required by law and our Articles of Association with the utmost care. In the course of close and trusting cooperation we have regularly advised the Executive Board in managing the association and have continually overseen it in the conduct of business. The Supervisory Board comprehensively addressed the association's operative and strategic development.

The Supervisory Board held four meetings in 2016. These took place in February, May, September and November. Supervisory Board meetings were notable for the frank and intensive interchange between the Executive and Supervisory Boards. Along with the meetings of the Supervisory Board, 'internal meetings' were also held, giving its members an opportunity of discussing topics in the absence of the Executive Board.

To the extent that the law, HHM's Articles or rules of procedure required the Supervisory Board's approval for specific measures, an appropriate resolution was passed. On the basis of documentation made available in advance by the Executive Board, Supervisory Board members regularly prepared themselves for decisions on any of their measures requiring our approval.

As Chairman of the Supervisory Board, away from the meetings I am also regularly party to a close personal dialogue with the Executive Board.

Invariable features of the regular meetings were the Executive Board's reports on the association's finan-

cial situation, total membership, and current activities and projects at headquarters and the representative offices. The Executive Board also briefed members on the current situation on the market and vis-à-vis the competition.

At its meeting on 23 February 2016, the Supervisory Board intensively considered the transport and logistics projects acquired and handled by the association at national and European level, and discussed the related advantages for the association and its members. The Supervisory Board took a decision to close the Port of Hamburg's Representative Office in South Korea, headed by Namyoon Lee, on account of market changes, on 31 December 2016.

On 10 May 2016 the Executive Board reported fully on activities and events in the areas covered by the Representative Offices. The Supervisory Board also discussed aggressive marketing against the Port of Hamburg by the competing ports of Rotterdam and Antwerp, and agreed that the Port of Hamburg's strengths should be the subject of intense communication with its customer base and other stakeholders. The Executive Board also presented its Annual Report for 2015.

The main feature of the meeting on 6 September 2016 was the Executive Board report on the audit of the annual accounts as at 31.12.2015. The Supervisory Board approved the reports submitted and released the Executive Board from their obligations for 2015. The Supervisory Board once again appointed ESC Wirtschaftsprüfung, Hamburg as the auditor for the annual financial statements for the year 2016. A further point on the agenda was the change in Port of Hamburg Marketing's Articles of Association required by its con-



tractual relationship with HPA Hamburg Port Authority as well as the changed legal position in Czechia.

At its final meeting of the year on 22 November, the Supervisory Board gave full consideration to the business plan for 2017. In this context, the Executive Board presented a scheme for a Container Roadshow to the Supervisory Board. This aims to promote the Port of Hamburg as Germany's largest rail port and to reach new target groups such as operating staff at forwarders, decision-makers on shipping in trade & industry, and despatch clerks.

On 12 October 2016 the Representatives' Assembly elected Ben Thurnwald of Hansaport to Port of Hamburg Marketing's Supervisory Board as successor to Erhard Meller, who retired on 30 June 2016, surrendering his office on the same day. Similarly, Michael Sieck's Supervisory Board mandate expired on 31 December 2016. His successor Hartmut Wolberg took over this mandate on 1 January 2017.

The entire Supervisory Board thanks the members of Port of Hamburg Marketing for the trust placed in them. The board also thanks the Joint CEOs and staff members for their commitment and all their work.

I should also like to thank the retiring members of Port of Hamburg Marketing's Supervisory Board for their contribution in that capacity.

Hamburg, April 2017

Thomas Lütje  
Chairman of the Supervisory Board

## MEMBERS OF THE SUPERVISORY BOARD Period 2015 – 2018

### **Thomas Lütje**

Chairman  
HHLA Container Terminal Tollerort GmbH

### **Dr. Dirk Claus**

Vice-Chairman  
Seehafen Kiel GmbH & Co. KG

### **Nils Kahn**

Vice-Chairman  
MSC Germany S.A. & Co. KG

### **Heinrich Ahlers** (until 31.03.2016)

Buss Group GmbH & Co. KG

### **Christine Beine**

Handelskammer Hamburg

### **Thomas Brüggmann**

GHB Gesamthafenbetriebs-Gesellschaft mbH

### **Tino Klemm**

HPA Hamburg Port Authority AöR

### **Ina Luderer**

Unternehmensverband Hafen Hamburg e. V.

### **Erhard Meller** (until 30.06.2016)

Hansaport Hafenbetriebsgesellschaft mbH

### **Jörn Prah**

Evergreen Shipping Agency (Deutschland)  
GmbH

### **Hubertus Ritzke**

Wallmann & Co. (GmbH & Co. KG)

### **Frank Schnabel**

Brunsbüttel Ports GmbH

### **Michael Sieck** (until 31.12.2016)

Hamburger Hafen und Logistik Aktiengesellschaft

### **Ben Thurnwald** (since 12.10.2016)

Hansaport Hafenbetriebsgesellschaft mbH


### **Jörg Ullrich**

European Cargo Logistics GmbH

### **Ingo Witte**

HHLA Container Terminal Altenwerder GmbH

Status: 31.12.2016



***'We work with heart and soul for the members of the association and the Port of Hamburg.'***

## Report by the Chairman of the Representatives' Meeting

Ladies and Gentlemen,  
Dear members,

With 295 members currently supporting Hamburg as a port and logistics location in the Port of Hamburg Marketing association, total membership is at a good level, being slightly up on last year. That is a clear indicator of trust, also that our activities are catering for members' interests.

Last year the ordinary session of the Representatives' Meeting was held on 12 October. The Executive Board reported fully on the current situation of the association, and in particular on total membership, as well as current activities and projects at headquarters and the Representative Offices. The Joint CEOs also reported on the current situation on the market and on competition. A further highlight was the report by the Chairman of the Supervisory Board. Thomas Lütje reported on its work in 2015. The Representatives' Meeting then released the Supervisory Board from their obligations for the 2015 financial year. In addition, the Representatives' Meeting decided that the amount and due date for membership dues should be retained unchanged for 2017.

The Representatives' Meeting also considered an adjustment to the Articles of Association in the 17

March 2014 version. The alteration in Port of Hamburg Marketing's Articles of Association was required by its contractual relationship with HPA Hamburg Port Authority as well as the changed legal position in Czechia. The other main changes in the Articles concerned the possibilities for summoning an extraordinary session of the Representatives' Meeting, the election of a Deputy Chair of the Representatives' Meeting, and for passing resolutions in writing.

The Representatives' Meeting agreed to co-opt Torsten Engelhardt, Hamburger Hafen und Logistik AG, as successor to Michael Berger of Buss Group, who laid down his mandate in the Representatives' Meeting on 29 February 2016. For the Supervisory Board, Ben Thurnwald of Hansaport was unanimously co-opted as successor to Erhard Meller in Membership Category B.

The entire Representatives' Meeting thanks the members of Port of Hamburg Marketing for the trust shown in them. The assembly also thanked the Joint CEOs and staff members for their commitment and all their work. Especially in the year under review, which was marked by very difficult background economic condi-

tions, intensive cultivation of the market and manifold activities by Port of Hamburg Marketing to position and boost the location were of special importance for the association and all its members. I should also like to thank Mr Berger as the retiring member of Port of Hamburg Marketing's Representative Meeting for his contribution to its work.

Hamburg, April 2017

Uwe Gaede  
Chairman of the Representatives' Meeting

## MEMBER OF THE REPRESENTATIVES MEETING

Period 2015 – 2018

### Uwe Gaede

Chairman  
Hamburg Südamerikanische Dampfschiffahrts-Gesellschaft KG

### Thorsten Kröger

Vice-Chairman  
NYK Line (Deutschland) GmbH

### Michael Berger (until 29.02.2016)

BUSS Group GmbH & Co. KG

### Michael Bruhns

Werner Bruhns Lagereigesellschaft mbH

### Torsten Engelhardt (since 12.10.2016)

Hamburger Hafen und Logistik Aktiengesellschaft

### Rainer Fabian

C. Steinweg (Süd-West Terminal) GmbH & Co. KG

### Sven Hargens

Brunsbüttel Ports GmbH

### Ortwin Harms

Lübecker Hafen-Gesellschaft mbH

### Holger Heinzel

Hamburger Hafen und Logistik Aktiengesellschaft

### Mark Hennings

GHB Gesamthafenbetriebs-Gesellschaft mbH

### Ulrich Kock

Stena Line Scandinavia AB

Status: 31.12.2016



# Membership and contact persons

## **Become a member of the Port of Hamburg Marketing Association now:**

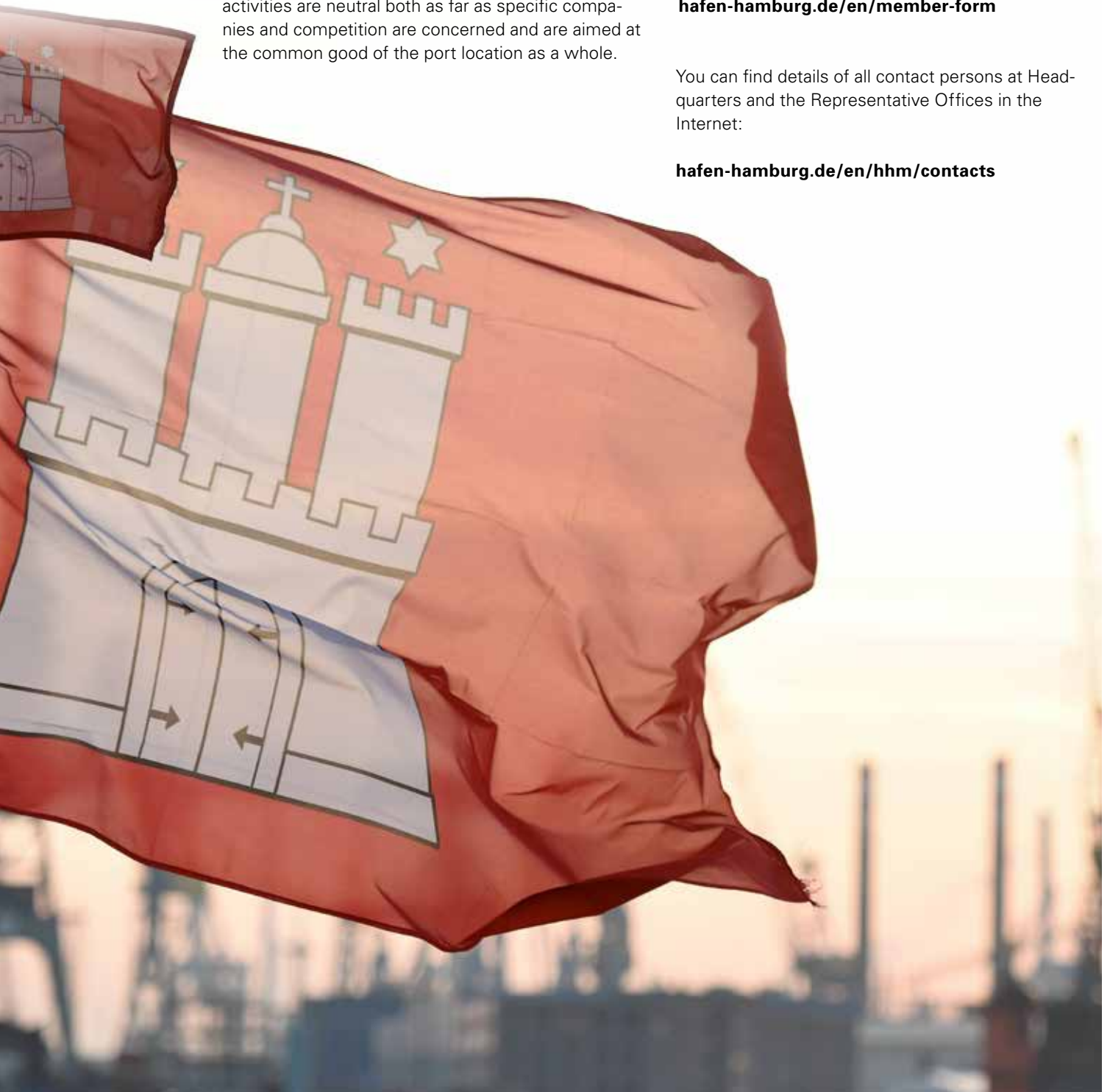
Port of Hamburg Marketing Association represents the interests of its members with targeted communication, project and marketing activities in the Hamburg location as well as important target markets. All activities are neutral both as far as specific companies and competition are concerned and are aimed at the common good of the port location as a whole.

Make contact with us. We would be pleased to inform you about the advantages and modalities of membership.

**[hafen-hamburg.de/en/member-form](https://hafen-hamburg.de/en/member-form)**

You can find details of all contact persons at Headquarters and the Representative Offices in the Internet:

**[hafen-hamburg.de/en/hhm/contacts](https://hafen-hamburg.de/en/hhm/contacts)**



# A STRONG VOICE FOR THE PORT OF HAMBURG

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12 Port of Hamburg Marketing

16 Staff



# Port of Hamburg Marketing

**The Port of Hamburg is among Europe’s top universal ports for flexibility and performance. State-of-the-art handling facilities and highly trained personnel are available for rapid and secure cargo handling. Port of Hamburg Marketing promotes Hamburg’s diversity of services as a port & logistics region, and very successfully: Hamburg as a universal port enjoys a positive worldwide image and stands for professionalism, efficiency and innovation.**

## PROFILE

Generating added value of 21.8 billion euros, the Port of Hamburg is of great importance for the entire German economy. A future-oriented port policy aiming to exploit cargo-handling potential, create optimal infrastructural links and assume responsibility for ecological progress and sustainability is essential for maintaining Hamburg’s growth course as a universal port. Against the background of tough competition from North Range ports, giving Hamburg as a port & logistics base a distinct profile on the market is absolutely vital.

With that aim, Port of Hamburg Marketing was set up in 1985. As an international marketing organization, today we are active worldwide in strengthening the Port of Hamburg’s place against international competition. With deep commitment and a variety of activities, we now

champion the port & logistics region of Hamburg’s attractive location and the diversity of services it supplies. As a result, in HHM the ports of the Metropolitan Region have also discovered a strong partner for professional location marketing.

The performance capacity of Hamburg as a port base rests on companies from the whole Metropolitan Region. Many of them are among our 295 members. We represent our members’ interests through targeted communication, project and marketing activities at our Hamburg base as well as in markets along the transport chain as far away as Asia. All our activities are neutral both as far as specific companies and competition are concerned and aim to serve the interests of the port as a whole.

## LOCATIONS

Port of Hamburg Marketing is both nationally and internationally well positioned at a total of twelve locations. Apart from the head office in Hamburg, there are three Representative Offices in Germany, in Dortmund, Dresden and Munich.

Representative Offices in Budapest, Hong Kong, Mumbai, Prague, Shanghai, St. Petersburg, Warsaw and Vienna promote the interests of the seaport business community in Hamburg and the region internationally. In over 25 market regions, our experts cultivate contacts with companies in industry and trade, the transport and logistics sector, business organizations and political decision-makers, also underpinning international marketing of the Port of Hamburg with numerous marketing activities on the spot.





## MEMBERSHIP TREND

At the end of 2016 the association had 295 members. These include renowned companies in the sea transport and port sector, in industry and logistics, as well as other service providers, institutions and trade associations. With the extension of marketing activities

along the transport chain, more and more companies from the Hamburg Metropolitan Region and the areas along the Elbe and the Elbe lateral canals, as well as the port's wider hinterland, are utilizing Port of Hamburg Marketing's network and expertise.

### In 2016 Port of Hamburg Marketing welcomed 16 new members:

<b>a. hartrodt Deutschland (GmbH &amp; Co) KG</b>	<a href="http://www.hartrodt.com">www.hartrodt.com</a>
<b>Bomin Linde LNG GmbH &amp; Co. KG</b>	<a href="http://www.bominlinde.com">www.bominlinde.com</a>
<b>Captrain Deutschland GmbH</b>	<a href="http://www.captrain.de">www.captrain.de</a>
<b>CLC China Logistic Center GmbH</b>	<a href="http://www.china-logistic-center.de">www.china-logistic-center.de</a>
<b>COLI Schiffahrt &amp; Transport GmbH &amp; Co. KG</b>	<a href="http://www.coli-shipping.com">www.coli-shipping.com</a>
<b>EMR European Metal Recycling GmbH</b>	<a href="http://www.emrgroup.com">www.emrgroup.com</a>
<b>EPS - Este Project Service GmbH</b>	<a href="http://www.eps-hamburg.de">www.eps-hamburg.de</a>
<b>IDENTEC SOLUTIONS AG</b>	<a href="http://www.identecolutions.com">www.identecolutions.com</a>
<b>Jungheinrich AG</b>	<a href="http://www.jungheinrich.de">www.jungheinrich.de</a>
<b>MARITIME LNG PLATTFORM e. V.</b>	<a href="http://www.lng-info.de">www.lng-info.de</a>
<b>mdrk Trusted Advisers Group Sp. zo.o.</b>	<a href="http://www.mdrk.eu">www.mdrk.eu</a>
<b>OPDR Germany GmbH</b>	<a href="http://www.opdr.de">www.opdr.de</a>
<b>planwerk elbe GmbH</b>	<a href="http://www.planwerkelbe.de">www.planwerkelbe.de</a>
<b>REM CAPITAL AG</b>	<a href="http://www.remcapital.de">www.remcapital.de</a>
<b>Sea Master Shipping GmbH</b>	<a href="http://www.seamastershipping.de">www.seamastershipping.de</a>
<b>TCU GmbH &amp; Co. KG</b>	<a href="http://www.tcu.de">www.tcu.de</a>

## NETWORK

The development of markets and the onward march of globalization make good contacts indispensable for mounting any rapid and targeted reaction to change. We therefore cooperate intensively at our Hamburg base and in relevant markets with logistics initiatives, chambers of industry and commerce, and other associations and organizations. We represent the interests of Hamburg as a port and logistics centre in international associations, and initiate alliances with strategically important ports.

Port of Hamburg Marketing also cooperates with numerous organizations in the form of reciprocal memberships. The aim of such alliances is regular interchange of data, the furtherance of joint interests, and cooperation on projects.

In 2016 we were able to expand our work through reciprocal membership with the MARITIME LNG PLATTFORM association.

### RECIPROCAL MEMBERSHIPS:

- **Deutsch-Chinesische Wirtschaftsvereinigung e.V.**
- **Deutscher Tarifeur-Verein e.V.**
- **Deutsch-Russischer Wirtschaftsbund e.V.**
- **DVWG Bezirksvereinigung Hamburg**
- **Elbe Allianz e.V.**
- **European River-Sea-Transport Union e.V.**
- **FILog Forschungsgemeinschaft Innovative Logistik e.V.**
- **Forschungsgemeinschaft für Logistik e.V.**
- **Gesamtverband Schleswig-Holsteiner Häfen e.V.**
- **Hafenkultur e.V.**
- **Hamburg Cruise Center e.V.**
- **Initiative Kiel-Canal e.V.**
- **Logistik-Initiative Hamburg e.V.**
- **LogistikNetz Berlin-Brandenburg e.V.**
- **MARITIME LNG PLATTFORM e.V.**
- **Maritimes Cluster Norddeutschland**
- **Netzwerk Logistik Leipzig-Halle e.V.**
- **Ost- und Mitteleuropa Verein e.V.**
- **SGKV - Studiengesellschaft für den Kombinierten Verkehr e.V.**
- **Unternehmensverband Hafen Hamburg e.V.**





## ORGANIZATION

In accordance with its Articles of Association, Port of Hamburg Marketing has four constituent elements: The Members' General Meeting, Representatives' Meeting, Supervisory Board and Executive Board. Their powers of decision are strictly demarcated.

The articles also require the Executive Board to invite members of the association to an ordinary **Members' General Meeting**, the most recent being held on 23 June 2015. The Representatives' Meeting for the period 2015 to 2018 was elected there, then itself electing members of the Supervisory Board for member categories B, C and F, also for 2015–2018.

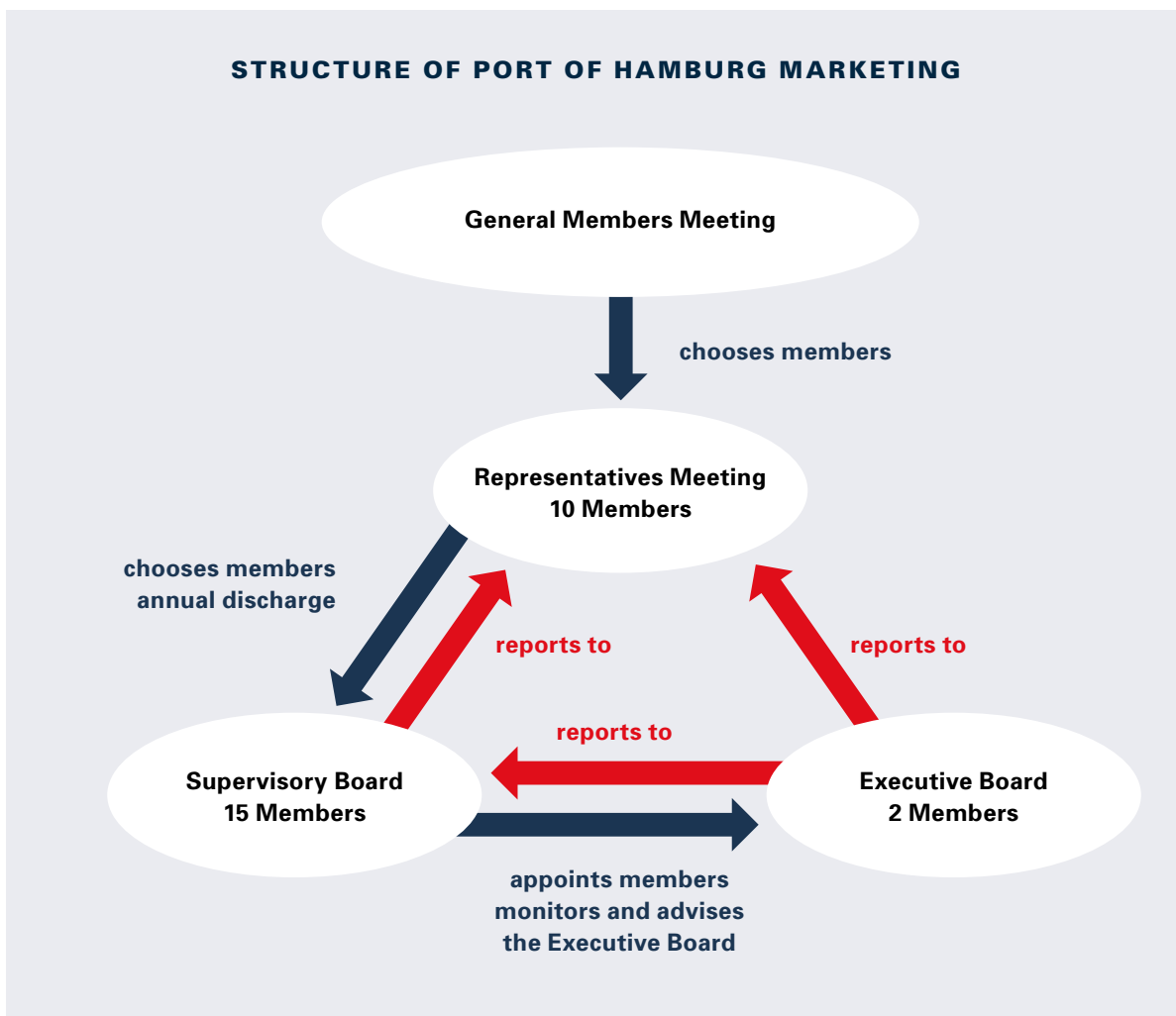
The **Representatives' Meeting** is the custodian of the membership rights of the association's members. The articles lay down that it comprises three representatives each from member categories A and B plus two each from categories C and F.

At the invitation of the Executive Board, the regular Representatives' Meeting meets at least once in a fiscal year.

The **Supervisory Board** advises and supervises the Executive Board on the leadership of the Association and is therefore immediately involved in all decisions of fundamental importance. The articles call for the Supervisory Board to consist of one person nominated by each member company in categories A-plus and A, three selected by Category B members, two selected by Category C members, one selected by Category F members, and one nominated member each for the Hamburg Chamber of Commerce, the ports of the Metropolitan Region and the Port of Hamburg Employers' Association. At the invitation of the Executive Board, the Supervisory Board meets at least four times per year.

The **Executive Board** runs the business of the Association.

The basic structure of this system is founded on Port of Hamburg Marketing's Articles of Association plus the Rules of Procedure for the Executive Board. The Articles also define the Association's aims.





## Staff

**To be successful as an international marketing organisation, Port of Hamburg Marketing relies on competent staff, who act responsibly. We offer sustainable conditions that ensure quality. These also foster and promote their expertise and personal development. Teamwork and acting jointly are constant features of our everyday activities.**

Port of Hamburg Marketing employed 42 staff on 31 December 2016. These are spread between 23 posts – including two for trainees - at head office in Hamburg, 17 at our Representative Offices in Germany and other countries, and two Executive Board appointments. Port of Hamburg Marketing is well positioned for staff so that during 2016 there was only a minimal need for adjustments in either head office or the Representative Offices. A vacant post in the Communication & Information Department at head office was filled in July 2016. The Representative Office in Prague was strengthened with the appointment to an existing post of a former intern in October 2016.

### INTERNSHIPS FOR STUDENTS

Port of Hamburg Marketing offers internships for students needing to do one as part of their course. Several months at our Hamburg head office give students

experience of the work of an international marketing organisation and of the job generally and enable them to profit from our international network. Port of Hamburg Marketing regularly supervises their BA and MA theses. Port of Hamburg Marketing employed a total of five students during the year.

### IN-SERVICE TRAINING

Well-trained, capable and motivated staff are our most vital asset. In 2016 Port of Hamburg Marketing therefore offered various measures to promote their development. The range extended from English courses, others in current correspondence style and IT applications, to maritime economy and value-added tax workshops. All these further training measures aim to equip the staff for the challenges of present and future developments.

# ACTIVITIES

## 18 Highlights 2016

### ACTIVITY REPORTS:

- 20 Press work
- 22 Online media
- 23 Visitor groups
- 24 Events
- 26 Trade fairs
- 27 Project development
- 29 Transport policy work
- 30 Market research



# HIGHLIGHTS 2016

**19.01.**

**Hamburg, Germany**

**Exclusive for members: 'Inheritance law for entrepreneurs' workshop**

Succession planning is an important topic for many family-run firms in the Port of Hamburg. In a stimulating workshop, Notariat Spitalerstrasse, a member since 2012, explains what entrepreneurs need to watch out for, and which traps need to be avoided.

**11.03.**

**Hamburg, Germany**

**Distinguished visitor for the Port of Hamburg**

Dorothee Bär, Parliamentary Under-Secretary of State, briefs herself on current infrastructure and digitalization projects in the Port of Hamburg. Particularly impressive for this politician: Hamburgs position as Europe's top rail port.

**19.04.**

**Moscow, Russia**

**TransRussia logistics trade fair**

For Hamburg, 'TransRussia' is the country's most important transport trade fair. To promote the port and logistics sector's strong performance, Port of Hamburg Marketing along with member companies is represented here for the seventeenth time.

**07.05.**

**Hamburg, Germany**

**Harbour trip for the 827th Hamburg Port Birthday**

In a relaxed atmosphere, around 130 mainly inland representatives from the worlds of politics and business discuss current traffic and transport issues on a traditional harbour boat trip during the celebrations of the Port of Hamburg's birthday.

**19.05.**

**Riga, Latvia**

**First 'German-Latvian Maritime Forum' organized**

Along with the Latvian ports of Riga, Ventspils and Liepaja, Port of Hamburg Marketing for the first time issues invitations to an event in Riga. Latvia's significance as an important trading partner for the Port of Hamburg is also the theme of the press conference prior to the event.

**16.06.**

**Tianjin, China**

**Port of Hamburg delegation travels to China**

A six-day visit to China by a Port of Hamburg business delegation centres on discussions with leading representatives of Chinese companies and ports in Shanghai, Ningbo, Beijing and Tianjin.



# H T S 2016

**29.08.**

**Hamburg, Germany**

**A maritime industry gathering**

With over 220 guests from the port and logistics sector, HHM's members' rendezvous in Hamburg is one of the year's highlights. The motto: Network until you drop!

**13.09.**

**Haldensleben, Germany**

**Focus on seaport-hinterland transport by inland waterway craft**

At the invitation of UHH, Haldensleben and Port of Hamburg Marketing, experts discuss the prospects and requirements of transport by inland waterway craft in the Elbe basin.

**15.09.**

**Halifax, Canada**

**Halifax Port Days 2016**

Axel Mattern presents the Port of Hamburg's current smartPORT projects at Halifax Port Days 2016, Canada's largest B2B event for the maritime transport sector. The event is organized by Halifax Port Authority, an HHM member since mid-2014.

**01.11.**

**Hamburg, Germany**

**Port of Hamburg goes online with Chinese website**

Market participants can from now on brief themselves in Chinese on the Port of Hamburg and its service portfolio. With its Chinese website [www.hafen-hamburg.de/cn](http://www.hafen-hamburg.de/cn) the Port of Hamburg caters for the immense importance of the People's Republic as a trading partner.

**08.11.**

**Hamburg, Germany**

**'More Chemicals. More Logistics. Opportunities for the Lower Elbe'**

This is the motto of the Sixth Seaport Congress in Hamburg. More than 70 experts discuss upcoming challenges for the Lower Elbe as a site for chemicals, logistics and production and consider some potential solutions.

**24.11.**

**Prague, Czechia**

**Bohumil Průša hands over the wheel**

At the regular social get-together, Bohumil Průša bids farewell after 26 years as Manager of Port of Hamburg Marketing's Representative Office in Prague on his official retirement from the transport sector.



**ACTIVITY REPORT**

# Public relations, publications and worldwide image advertising

**Using the full array of press and PR instruments, Port of Hamburg Marketing positions Hamburg as a port and logistics location in national and international media. The topics range from state-of-the-art developments in handling seaborne cargo to service offerings from the port transport sector. Numerous publications complement the comprehensive range of information.**

**PUBLIC RELATIONS**

Port of Hamburg Marketing’s annual press conference in February is the largest press event of the year, attended by 80 journalists from print, radio and TV media, as well as representatives from the Hamburg administration and port sector. Together with Frank Horch, Senator for Economics and Jens Meier, CEO of Hamburg Port Authority, the joint CEO’s of Port of Hamburg Marketing Axel Mattern and Ingo Egloff brief the audience on the sea cargo handling results for 2015, the political conditions for transport and current Port of Hamburg infrastructure projects.

Port of Hamburg Marketing organized two further press briefings for the first and third quarters of 2016 for the trade press and local editorial staff. They were briefed on the universal port’s handling figures. This was complemented for the journalists by input on major rail network projects in North Germany by DB Netz, and port infrastructure projects by Hamburg Port Authority. In addition, on average once a week, press releases were compiled and issued on sea transport and port topics. These were mainly about new liner services via Hamburg, deploying greater ship capacities, developments in important sea trades, joint activities with the ports throughout the Elbe region and project results.

The numerous events and trade fair presences both domestically and internationally provided the opportunity to brief the press on association and members’ activities. Reporting on all press activities was present in both local and regional media, just as federally and internationally with the support of staff in our representative offices. The comprehensive press distribution list was further enhanced during 2016.

On the Internet platform [www.hafen-hamburg.de](http://www.hafen-hamburg.de) interested visitors were able to read current news daily from the Hamburg port sector and the partner ports in the region. Apart from their own topics, they integrated press information from the more than 290 member companies and partner institutions of Port of Hamburg Marketing. This service is complemented by the press picture archive providing printable port motifs for download at no cost for interested media.

During the year, everyday Port of Hamburg Marketing processed press enquiries on figures, data and facts for the entire port, supplied journalists with reports, statistics, photographic material and background information. They also piloted media representatives around the port in launches for background discussions and preparing reports. Moreover, edited contributions were compiled for special publications in various media.

**WORLDWIDE IMAGE ADVERTISING**

During 2016, Port of Hamburg Marketing placed advertisements in some 70 significant national and inter-



*Joint CEO Ingo Egloff being interviewed about the Port of Hamburg’s quarterly results.*

For its half-year press conference 2016, Port of Hamburg Marketing issued an invitation to Wallmann & Co’s multi-purpose terminal, for a briefing on seaborne cargo handling developments in the first six months. Key-note speeches by Hubertus Ritzke, CEO of Wallmann & Co. and Steffen Rudkowsky, Head of Division Supply Chain/Logistics, Siemens AG, enabled participants to gain an insight into the handling of conventional cargo and industry’s special needs for project and heavy-lift cargo. After the press conference the media representatives had the opportunity of taking a tour around the terminal and seeing how it works first-hand.



*The Annual Port of Hamburg Press Conference was held on 12 February 2016.*

national print and online media. When planning media, above all consideration is given to trade publications in relevant core markets for the Port of Hamburg.

The advertising motifs featured the diversity of services available in the universal port of Hamburg. Advertisements were placed in and around comprehensive trade contributions to the Port of Hamburg, as well as in publications with the accent on topics such as seaport hinterland services, container and bulk cargo handling.

## **PUBLICATIONS**

The publications designed and issued by Port of Hamburg Marketing in 2016, with a total circulation of some 100,000 copies, were geared primarily to the Port of Hamburg's customers and partners. Distribution was carried out using the established mailing list and via the domestic and international representative offices. Among the regularly appearing publications are 'Port of Hamburg Magazine', the ship departure list - 'Liner Services via Hamburg' and the 'Facts and Figures' flyers. 'Port of Hamburg Magazine', revamped in 2015 and appearing quarterly, has been very well received by the Port of Hamburg's member companies and customers. The four issues in 2016 dealt with the topics of the 'Digital Port', 'Heavy cargo', 'Ocean Traffic' and 'Focus Baltic Sea'. In the media library under [www.hafen-hamburg.de](http://www.hafen-hamburg.de) the magazine is available to readers as an e-Paper in German and English. The ship departure list 'Liner Services via Hamburg' was editorially revamped in 2016 and targeted both domestically and internationally to provide advertising and information on the

Port of Hamburg. For the port's member companies and partners the publications also provide platforms for companies' own advertising.

Port of Hamburg Marketing produced appropriate publications to accompany studies and projects as well.



*The third issue of the Port of Hamburg Magazine in 2016 took readers into the fascinating world of conventional general cargo handling.*

**ACTIVITY REPORT**

# Online media

**Port customers, media representatives and the general public use the wide range of Internet offerings provided by Port of Hamburg Marketing. These include the website [www.hafen-hamburg.de](http://www.hafen-hamburg.de), the newsletter PORTnews and the search engine for warehousing and logistic service providers PORTlog. Member organizations and partners also profit from the members portal PORTblog as well as the offerings in the Online Marketing section.**

**www.hafen-hamburg.de**

With the issue of 'Liner Services 16/17' the online departures database was revised and now offers users enhanced operation in addition to information on routes and services between chosen ports. The graphics and content of the inter-modal database were also modified. Inquiries can now include rail and inland waterway vessel connections via Hamburg.

rent developments in regular and inter-modal services via Hamburg as well as events in the market regions. Currently PORTnews has about 3,900 subscribers for the German language version and 500 for English.

**PORTblog**

The members' portal PORTblog is used as an internal communications platform between member organizations and Port of Hamburg Marketing. Especially popular are the automatic press reviews covering local, national and international media with the latest news on port and transport industry issues. In addition PORTblog offers interactive communication on specific dates, events and corporate news among others.

**HAMBURG'S PORT SEAGULL PETER PICKHUBEN AND SOCIAL MEDIA ACTIVITIES**

The port seagull Peter Pickhuben, Port of Hamburg Marketing's mascot, is a popular figure used by the Port of Hamburg. On Peter Pickhuben's Facebook page regular tips, short anecdotes and fascinating stories on the Port of Hamburg are posted. Those interested can get breaking news and the latest information on Hamburg's universal port on Port of Hamburg's Facebook page or on Twitter. In addition, Twitter has become a virtual ships welcoming station. Here all incoming and outgoing ships are tweeted automatically.

*Since November 2016 players on the market have been able to brief themselves on the Port of Hamburg and its service portfolio in Chinese.*



In November 2016 the web presence for international visitors was extended and now offers a version in Chinese. The Facebook web presence was extended to include 'Peter's noticeboard'. Here regular contributions from various areas of the maritime world are posted in an informal setting to the general public. Photos of seagull cuddly-toys in action are shown in 'Peter on Tour'.

Topic specials offer texts, graphics, photos and videos giving background information on important issues concerning the Port of Hamburg. In the reporting year topics such as the port railway and the fairway adjustment were addressed.

**PORTnews**

During 2016 there were 38 issues of the Port of Hamburg's information service PORTnews, of which 12 were in English. The digital newsletter provided subscribers with information on all aspects of the Port and logistics in Hamburg and the region, together with economic background and its consequences for the Port of Hamburg. Readers were also informed of cur-



**WEB PROJECTS FOR MEMBERS AND PARTNERS**

During the reporting year Port of Hamburg Marketing once again supported member organizations and partners to organize, design and maintain their websites.



ACTIVITY REPORT

# Visitor Groups

**Port of Hamburg Marketing organizes customized visitor programmes for interested domestic and international delegations and groups in Hamburg and the metropolitan region. Informative tours accompanied by experts, terminal and corporate visits and lectures by experts are on offer.**

During 2016, Port of Hamburg Marketing organized various visitor programmes for national and international expert delegations and visitor groups. These included shippers, customers, port and German states' delegations, media representatives, plus associations and institutions.

A high level of interest in tours through Germany's largest port once again came from both traditional universities and those of applied science, as well as vocational schools throughout Europe. Port of Hamburg Marketing supported the upcoming generation of port-related professions by organizing and accompanying port information tours, terminal and corporate visits. In total, 36 groups with a total of some 1,140 vocational and university students visited the Port of Hamburg during the reporting year. Representing a 30 percent share, this was the largest segment of all.

Shippers and customers, especially, come to the Port of Hamburg for discussions with experts, to visit operations and for information meetings. Both for the port sector, as well as importing/exporting industry, trading companies and the transport industry profit from these visits and resulting contacts. 27 groups from this segment visited the port during the year. This represents almost 23 percent of the total and a considerable increase compared to the previous year.

As part of its transport policy lobbying, the Port of Hamburg Marketing showed a total of five groups of German political representatives around the port. They exchanged views on the transport policy framework and necessary infrastructure projects for the Port of Hamburg.

When comparing countries, China lead Austria in the visitor group statistics. In total there were 65 expert visitor groups, i.e. some 57% were international. Visits by numerous delegations from neighbouring countries including Denmark, Poland, Czechia and Slovakia, underlined Hamburg's importance as a hub for European freight transport. However, delegations from countries like Argentina, Japan, South Korea and the USA visited the Port of Hamburg during 2016 to thoroughly brief themselves on its importance in global trade, logistics processes and port management.

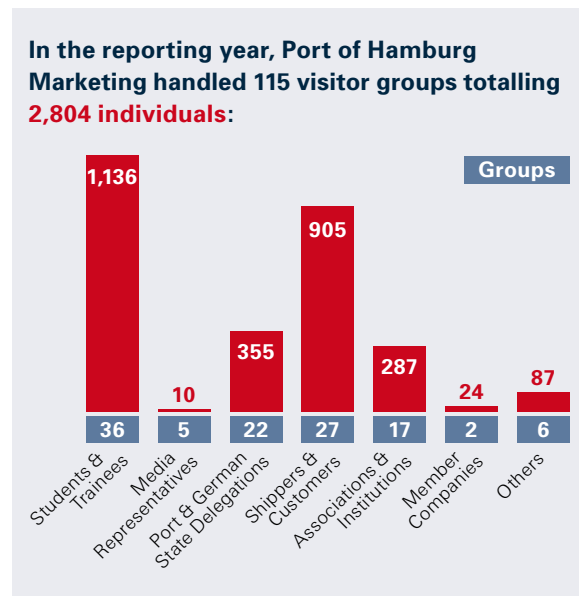
In 2016, Port of Hamburg Marketing once again organized tours for Hamburg port birthday visitors. HHLA, Eurogate and the Port of Hamburg Museum opened their doors giving visitors a view of processes, hand-



*In February, 2016, students on the International Food Industry Management course at Essec Business School, Paris, visited Vollers Hamburg's unprocessed cocoa warehouse.*

ling terminals and working methods in the port worlds of today and yesteryear. Some 115 private individuals received valuable insights, experiencing the port 'hands on'.

When organizing and handling visitor groups as representative of the Hamburg port sector, Port of Hamburg Marketing prioritizes expert business and political groups, as well as the upcoming generation. Visitor groups that do not fit into Port of Hamburg Marketing's visitor profile are provided with contact to providers of special port tours, port shipping or the maritime museums.



ACTIVITY REPORT

# Events

**Port of Hamburg Marketing strengthens the image of the Port of Hamburg with various event formats both domestically and internationally. In Hamburg and the Metropolitan Region, Port of Hamburg Marketing stages conferences, workshops and networking events, offering partners and member companies a diverse range of event management support from one-stop shopping to niche services. With its events in relevant core markets, Port of Hamburg Marketing positions Hamburg’s important port and logistics sector topics, offering an excellent networking platform.**

During the reporting year, Port of Hamburg Marketing took on total organisation of events, featuring as a co-operation partner or external service provider, and supporting companies, for example, with the search for a suitable event location or marketing an event. Additionally, Port of Hamburg Marketing supported numerous congresses and events in the maritime logistics sector with announcements in event calendars on its Internet page [www.hafen-hamburg.de](http://www.hafen-hamburg.de) and in its members’ portal PORTblog, as well as in PORTnews, the digital newsletter.

Days 2016’, HHM issued an invitation to a forum in Hamburg. This was taken up in September by 120 participants. The hotly contested debate on what impact the fixed Fehmarn Belt crossing will have on inter-modal freight flows and economic development, was reflected in the varying views and challenges among the five panellists from politics and business. Moreover, in its role as lead partner in the EMMA project, HHM organized a forum on the question: ‘How can inland waterway shipping be integrated into transport chains? Swedish challenges and European best practice’. The EMMA project is equally promoted by the Interreg Baltic Sea programme. The forum was held as part of the 7th strategy forum for the ‘EU Strategy for the Baltic Sea Region’, that was held in Stockholm, in November.



*Those attending the Members’ Rendezvous on 29 August 2016 enjoyed good discussions in very fine weather.*



## MEMBER AND CUSTOMER EVENTS IN THE MARKET REGIONS

During the reporting year, Port of Hamburg Marketing organized more than 40 events in the Port of Hamburg’s domestic and European hinterland markets. The networking and information events created a framework for forums on current topics, for expert

## HHM’S OWN EVENTS

This year, Port of Hamburg Marketing’s invitation to the traditional port tour during the Hamburg port birthday was taken up by 130 representatives from the worlds of politics and business. The main aim of this event is to bring together hinterland business partners, presenting the Port of Hamburg in a special atmosphere. Then in a relaxed atmosphere to discuss current transport topics.

The invitation to the annual members meeting in August was taken up by some 220 participants from HHM’s member companies. Once again this meeting proved a real sector meeting and networking platform among the members. During the year, Port of Hamburg Marketing held a workshop for member companies on ‘Inheritance law for company owners’.

During 2016, conferences within the framework of EU-promoted projects were organized by HHM. In its role as leader of the Fehmarn Belt pilot case in the TENTacle Baltic Sea project, during the ‘Fehmarnbelt



*At Fehmarnbelt Days 2016, on 21 September experts from the worlds of politics and business engaged in a tense debate on the impact of the Fehmarn Belt Fixed Link.*



*Expert presentations and discussions enabled participants to the Sixth Seaport Congress to exchange views on the prospects and challenges for the Lower Elbe as an area of economic activity.*

lectures on innovation and services in the Hamburg port and logistics region, as well as general trends and developments in the maritime economy. Each event topic was aligned to the region, the participating customers and the members' interests. In total, more than 3,900 decision-makers from the Hamburg logistics and port sectors, as well as from trade, industry and transport sectors in the market regions, took part in the domestic and European events. Many of these were accompanied by numerous press activities.

The member and customer events held during 2016 provided an excellent platform for both initiating and deepening business relationships.

## COOPERATION EVENTS

The sixth national 'Seaport Congress' took place in November. The event was jointly organized with UMCO and supported both in content and organizationally by the 'Supra-state regional management for the Lower Elbe economic region' project. The more than 70 delegates from industry, ports and logistics were able to brief themselves about coming challenges and potential solutions for the Lower Elbe region as a chemical, logistics and production location. The focus for the keynote speeches, forums and mission

statement was the background for locating industry in the sensitive region, as well as the conditions for strong logistics for a successful, internationally-oriented industrial region.

The 'Enhancing Inland Navigation in the Baltic Sea Region' congress was a joint event organized by the Elbe/Oder joint chambers of commerce and the EU Interreg Baltic region project EMMA in Warsaw in November. As lead partner in the project, Port of Hamburg Marketing provided support by arranging speakers and acquiring participants as well as on-the-spot presence. Some 130 delegates were agreed that European cooperation is needed to better integrate transport by inland-waterway shipping in multi-modal logistics chains in the future.

During 2016, Port of Hamburg Marketing again frequently acted as supporter of external events, above all involving itself in the organisation and accompanying port tours and advertising events. Good examples were the 'Second International BME/VDV Intermodal Congress', 'TOC Europe Global Conference & Exhibition' and 'Shortsea Shipping Days 2016'.

**ACTIVITY REPORT**

# Trade fairs

**Trade fairs are a proven presentation platform for positioning the Port of Hamburg internationally and at the same time for gaining potential customers’ enthusiasm for fresh product ranges and innovations. Port of Hamburg Marketing showcases at selected specialist fairs in vital core markets and growth regions with strong potential. Member companies use the Port of Hamburg umbrella brand to present their extensive range of services.**

Port of Hamburg Marketing annually presents the universal port of Hamburg’s diverse service portfolio at several international transport and logistics trade fairs. Especially for member companies, such participations are conceived and organized as a joint stand under the Port of Hamburg as umbrella brand. In 2016 Port of Hamburg Marketing and its members organized three trade fair participations.

The Port of Hamburg was once again represented at the TransRussia trade fair in Moscow in April. For Eastern Europe and the Russian market, this is the industry’s largest and most important trade fair. Port of Hamburg Marketing and its co-exhibitors were already exhibiting at Breakbulk Europe in Antwerp for the eleventh time. In terms of quality, the high number of trade visitors attending made this a convincing event. In autumn 2016, there was an anniversary to be celebrated in Shenzhen, this being the tenth occasi-

on on which the Port of Hamburg had showcased for the CILF public. After the trade fair, Port of Hamburg Marketing invited many guests to the now traditional Port Evening in Hong Kong, for which numerous acceptances were received. After regularly participating in transport logistic China, held every two years in Shanghai, in 2016 Port of Hamburg Marketing decided to dispense with a trade fair stand. As an alternative, members were offered a delegation visit to China that apart from a call at the trade fair rested primarily on appointments with logistics managers and other well connected people, with stops at Shanghai, Ningbo, Tianjin and Peking. Thanks to the groundwork by the Port of Hamburg’s Shanghai Representative Office, numerous contacts were made for the member companies participating. A workshop at Hamburg House and a VIP dinner in Shanghai, especially, aroused great interest among our Chinese partners and led to intensive interaction.



*Along with member companies, Port of Hamburg Marketing showcased the Port of Hamburg’s efficiency at ‘Breakbulk Europe’.*

**PORT OF HAMBURG TRADE FAIR PARTICIPATIONS IN 2016**

<p><b>TRANSRUSSIA 2016, MOSCOW</b> 19–22 April 2016</p>	<p>Co-exhibitors: Hamburger Hafen und Logistik, Lübecker Hafen-Gesellschaft, Samskip</p>
<p><b>BREAKBULK EUROPE TRANSPORTATION CONFERENCE &amp; EXHIBITION, ANTWERP</b> 24–26 May 2016</p>	<p>Co-exhibitors: Alfons Köster &amp; Co., Brunsbüttel Ports, Buss Port Logistics, Hamburger Hafen and Logistik, Rendsburg Port Authority, Seehafen Kiel, UASC Europe, Wallmann &amp; Co.</p>
<p><b>CHINA INTERNATIONAL LOGISTICS AND TRANSPORTATION FAIR (CILF), SHENZHEN</b> 12–14 October 2016</p>	<p>Co-exhibitor: SACO Shipping</p>

## ACTIVITY REPORT

## Projects

**Project development is a first significant step towards active participation in transport policy formation and long-term port development. Port of Hamburg Marketing pursues this aim by regularly joining member companies as well as partners from the academic, commercial and public sectors in bidding for projects promoted by the EU and national governments.**



## ” INTERVIEW

**Stefan Breitenbach heads Port of Hamburg Marketing's project department. He explains the nature of his team's tasks, speaks about the advantages for member companies, and introduces the four projects that are currently running.**

**What does project development involve?**

In personal interviews we learn – often through our Representatives – that members see themselves confronted by specific challenges. On the project side, we tackle the topics raised and examine how we can align ourselves with our members and assist them. At the outset, we work out in detail what the challenges are. We then weigh up which external parties, similarly, would profit from a solution, should we take up the challenge. Emerging then as project partners will be various players from EU states at an international level, and individual companies within Germany. As a next step, we check the European Union's calls for tender for EU projects. These aim to promote international consortia for its projects. Together with the project partners now found, we then work up – mostly during workshops – the funding application. The routine is much the same for German projects, except that the pot the subsidy comes from is naturally a different one. In addition, we ourselves are also approached by other

countries or companies about joining their own projects. As a mere partner, we are then the more passive player in the developing the project. We then report to our members about the topics raised so that they may possibly contribute relevant content.

**What specific benefits do members derive from your work?**

We accept the challenges presented by our members. These may be contained, for example, in an upcoming decision on transport policy or a hinterland link that requires upgrading. In addition, we arrange appropriate international contacts with partners in the academic, commercial and public sectors. Lobbying like this generates crucial added value. Should members spot the challenge in changing market conditions, caused for example by an infrastructure project, we analyse their reservations, assess the repercussions and prepare specifically for these developments. Our members can also derive an additional benefit from the working groups that are formed in the wake of projects, and on which we represent their interests. One example is the River Information Services working group, launched as part of our EMMA inland waterway shipping project. This takes up digitalization of infrastructure and offers a platform for the Federal Ministry of Transport & Digital Infrastructure and the Federal Waterways and Shipping Authority, as well as representatives of Port of Hamburg Marketing and Hamburg Port Authority. With events and discussion platforms, we also facilitate an interchange of knowledge at international level.

**Which goals should work on the project aim to achieve?**

In the first place, with the acquisition and implementation of projects we aim to contribute towards strengthening Hamburg as a port and logistics centre in the competitive international environment. Among our aims are optimization of transport and handling processes, along with the improvement of transport structure. One extremely good example of these structural improvements, also of growing media presence, is the 'EMMA' project.

**'EMMA'?**

This is our EU-backed project aimed at strengthening and further developing inland waterway shipping in

**ACTIVITY REPORT**



*The first working results of the EMMA project were presented at the EMMA-KEO Capital City Conference in Warsaw in November 2016. In three forums, delegates discussed the status quo, along with the challenges and opportunities for inland waterway shipping in the Baltic region. In the third forum – ‘Developing a joint voice for inland waterway shipping in Europe’ – Stefan Breitenbach highlighted both the project and the inland shipping sector’s pressing need for strong representation.*

Northern and NE European canal and river systems. This commenced in March 2016 and will run until February 2019. We have altogether managed to gain 20 project partners from Germany, Finland, Lithuania, Poland and Sweden, as well as more than 43 associated partners for EMMA. The EU budget totals around 4.42 million euros.

The very differing state of development of inland waterway shipping in the various countries and the related problems are of interest. In Sweden inland waterway shipping has only just been introduced. This will involve re-interpretation and/or alteration of many existing legal provisions so as to create a competitive market environment. In Germany we are fighting for investments in infrastructure, further progress on digitalization, increased efficiency and hence greater competitiveness.

**Which specific steps are required for attainment of EMMA’s goal?**

We wish to strengthen both the competitive position of inland waterway shipping, also of existing trade and other associations in the Baltic region. Another field needing work are those bureaucratic hurdles and regulations making inland waterway shipping in some respects a sluggish area in the transport and logistics sector – EMMA is acting here with analyses and consequential recommendations to administrations of the different states. In addition, the project incorporates planning for hard-and-fast transfers to inland waterway craft to prove that these can function. We want

to show the parties just what potential lies in inland waterway shipping. With information events and lobbying activities, we aim to give this seriously underestimated mode of transport a powerful voice.

**EMMA is just one of the current projects. How do the other three look?**

TENTacle and NSB CoRe are also EU projects concerned with the Baltic region. We are project partners in both, and the time frame is identical with EMMA’s. At the end of 2016, Hamburg-NRW plus involved stepping up preparation of a German national project for transferring traffic on the Port of Hamburg’s hinterland services. A start is scheduled for this summer. Hamburg-NRW plus will be headed by Port of Hamburg Marketing and a partner from NRW still to be appointed.

**What are the core features of TENTacle and NSB CoRe?**

Under the TENTacle project, Port of Hamburg Marketing is concentrating on the Fehmarn Belt Fixed Link. The question here is what influence the planned tunnel could have on existing seaport-hinterland traffic in Northern Germany. In the first place, the possible negative repercussions for port & logistic centres are examined, with additional consideration of whether fresh logistics schemes will become essential for the Metropolitan Region.

NSB CoRe concerns intermodal logistics in the Baltic region and especially the planned Rail Baltica Growth Corridor, to which Hamburg is linked. Its core features are the structure and strengthening of intermodal transport chains, as well as network formation and simplification of cross-border services.

**What does Hamburg-NRW plus aim to achieve?**

Where this makes sense, along with the Ministry of Transport in North Rhine-Westphalia, we aim to transfer transport services from trucking to rail. The basic premise is that rail is the ideal mode of transport for the distance between Hamburg and North Rhine-Westphalia, yet more than 80 percent of freight is carried by truck. In addition, NRW is responsible for around one-third of the most frequently reported traffic jams in Germany. That represents additional potential for rail and inland waterway transport.

**Which projects are planned for 2017?**

We are currently engaged on preparing projects focused on intermodal transport and short-sea services. Our applications will be submitted in the course of this year. We are currently in discussions about these with various member companies, to quiz them on their interests and incorporate these..

## ACTIVITY REPORT

# Transport policy lobbying

**German seaports are of outstanding importance for the entire national economy. The Port of Hamburg alone annually generates nationwide added value of 21.8 billion euros and underpins around 269,000 jobs, of which over 113,000 are outside the Hamburg Metropolitan Region. To ensure that Hamburg can continue to assert itself as a port and logistics centre against international competition, the first essential is a properly functioning infrastructure. Along with its partners, Port of Hamburg Marketing therefore promotes the positioning of vital traffic infrastructure projects at political level.**

In 2016 Port of Hamburg Marketing was heavily involved with trade associations and politicians in order to position essential North German transport projects in Berlin. In the next few years, for instance, apart from the dredging of the navigation channel on the Lower and Outer Elbe, access and dispersal corridors for freight transport by rail, truck and inland waterway craft will need to be adapted and expanded for increasing volumes. Port of Hamburg Marketing favours an open and transparent interchange of information with all those involved to facilitate joint discussion of new transport schemes and routes. The focus is on events and personal contacts.

Along with other associations and institutions, Port of Hamburg Marketing regularly organizes a Port Breakfast for MPs and officials of Federal ministries in Berlin. The idea is to brief them on current topics of importance for Hamburg's seaport business community. On five dates in January, March, June, September and November, 2016 guests received information on the following themes: 'The Kiel Canal as an example of the importance of maritime infrastructure', 'The maritime industry's offensive on innovation – How things

stand', 'Federal Transport Infrastructure Plan – Has prioritization succeeded?', 'Progress report on the Fehmarn Belt fixed link' and 'Opportunities in the crisis – The prospects for Germany as a shipping base'.

At the invitation of Port of Hamburg Marketing, Dorothee Bär, Parliamentary Under-Secretary of State in the German Ministry of Transport and Digital Infrastructure, and the Federal Government's Coordinator for Freight Transport and Logistics, visited the Port of Hamburg at the beginning of March to brief herself on current infrastructure projects and the progress of digitalization of Hamburg as a universal port.

Additional members of the German Lower House and staff from ministries of transport in several German states, also a delegation from the European parliament, briefed themselves on the Port of Hamburg's importance as an essential logistics hub in Northern Europe.

The Joint CEOs also attended networking events, parliamentary evenings for example, on transport policy topics.



*On a harbour tour: Along with HPA and HHLA representatives, in March 2016 Port of Hamburg Marketing briefed Dorothee Bär, the German government's Coordinator for Freight Traffic and Logistics, on current infrastructure and digitalization projects in the Port of Hamburg.*

**ACTIVITY REPORT**

# Market research

**Continuous market research and analysis is the foundation for many Port of Hamburg Marketing projects and marketing activities. Member companies profit from exclusive data and evaluations on seaborne cargo handling, liner and hinterland traffic, using this data as the basis for company activities and decisions.**

Port of Hamburg Marketing continually collects, analyses and interprets data on seaborne cargo handling, liner and hinterland transport sector. This comprehensive range of data mainly extends along the entire transport chain – from the open sea via the Port of Hamburg and into the hinterland. Apart from monthly updated databases, specialized books, market surveys, statistics and industry bulletins, as well as regional, national and international trade magazines, also press and expert interviews are used to enrich and link up the knowledge base. Especially on the hinterland regions, expert knowledge from the Representative Offices reinforces the market research data pool. These data permit analyses and assessments of freight and traffic flows, placing these in the port’s competitive environment.

**MARKET DATA AND MARKET ANALYSES**

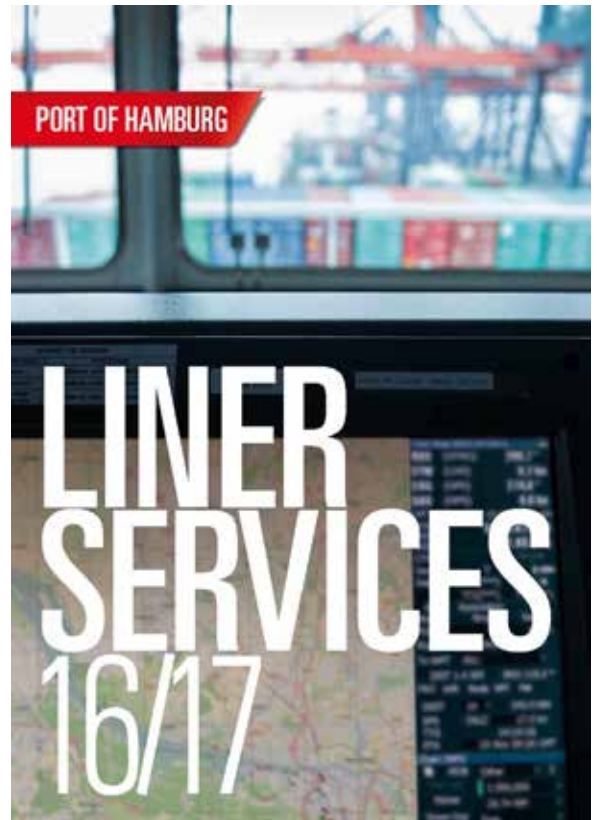
In 2016 Port of Hamburg Marketing submitted four quarterly reports and eight on seaborne cargoes – ‘SeegüterREPORTs’ – to members. These contained detailed data and background facts on the development of seaborne cargo handling in the Port of Hamburg and by its competitors. This also covered monitoring and analysis of developments in liner services and seaport-hinterland traffic. Among the resources for analysing seaborne cargo and container throughput and up to 250 trade routes are several of HHM’s own databases. In the liner shipping field, trade route analyses and service profiles for container and general cargo shipping are compiled quarterly and on set dates. Trends in fleet sizes and order books are also covered. Publications on current changes in liner shipping – new services, vessels or links, for example – supplement the portfolio.

In addition to its periodically issued reports, Port of Hamburg Marketing handled a large number of projects and enquiries commissioned by members, relating to cargoes, carriers or trade routes.

The market research department also processed the basic content for publications and presentations in the form of evaluations, editorial contents and diagrams. For example, evaluation and analysis of seaborne cargo throughput data and of changes in liner services, formed the basis for press events with a public impact.

**PORT OF HAMBURG LINER SERVICES**

In 2016 we once again updated and published ‘Port of Hamburg Liner Services via Hamburg’. This offers an overview of the Port of Hamburg’s direct liner connections. The liner sailing database in our Internet presence - [www.hafen-hamburg.de](http://www.hafen-hamburg.de) – supplements this with additional data and functions. Both the online database and the print edition form a keenly sought data source for port customers in Germany and many other countries. We distributed 12,000 copies of the print version in 2016. In addition, more than 30,000 users per month visited the liner sailings database in the Internet.



*Apart from liner connections in intercontinental transport, ‘Port of Hamburg Liner Services’ also lists details of the large number of European feeder and short-sea shipping services.*



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# Port of Hamburg 2016: Facts & figures

The Port of Hamburg is especially notable for the high quality and speed of its cargo handling, its excellent hinterland links and its immensely diverse range of logistics services. Hamburg is internationally recognized as a port and logistics base and enjoys a positive image. Despite difficult operating conditions, Germany's largest universal port has achieved a turnaround, namely a slight advance last year in seaborne cargo throughput as well as a new record on seaport-hinterland transport by rail.

## Seaborne Cargo Handling



**+ 0.3 %**  
138.2 m. tons

Container handling  
**+ 1 %**  
8.9 m. TEU

Bulk cargo handling  
**- 1.3 %**  
44.9 m. tons

Conventional general  
cargo handling  
**- 11 %**  
1.53 m. tons



## Container handling at ports in Northern Europe

Hamburg  
**+ 1 %**  
8.9 m. TEU

Rotterdam  
**+ 1,2 %**  
12.4 m. TEU

Bremen Ports  
**- 1 %**  
5.5 m. TEU

Antwerpen  
**+ 4 %**  
10 m. TEU



## Container handling by trade areas

China  
**+ 1.6 %**  
2.58 m. TEU

Russia  
**+ 4.5 %**  
0.45 m. TEU

India  
**+ 2.0 %**  
0.24 m. TEU

Malaysia  
**+ 0.7 %**  
0.29 m. TEU

USA  
**+ 11.1 %**  
0.36 m. TEU

Finland  
**+ 3.2 %**  
0.36 m. TEU

Great Britain  
**+ 12.6 %**  
0.25 m. TEU

UAE  
**+ 11.1 %**  
0.23 m. TEU



## More ultra large container ships at the Port of Hamburg

10,000 – 13,999 TEU  
**- 10.3 %**

≥ 14,000 TEU  
**+ 60 %**



## SEABORNE CARGO THROUGHPUT

In 2016 total seaborne cargo throughput in the Port of Hamburg reached 138.2 million tons, representing growth of 0.3 percent, or 347,000 tons, on the previous year.

The increase was attributable to general cargo throughput, which in 2016 represented a 67.5 percent share of the total, after 67 percent in the previous year. In the year under review, throughput of general cargo – both containerized and conventional – at Hamburg terminals totalled 93.3 million tons, an advance of one percent or 922,000 tons on the previous year. The main reason for this lay in the container throughput that so predominates in Hamburg. As in the two previous years, in 2016 the Port of Hamburg's index figure for containerization, or containerized general cargo's proportion of the general cargo total, was around 98.4 percent. At 91.7 million tons, in 2016 containerized cargo throughput was up by 1.1 million tons or 1.2 percent on the previous year.

In 2016 throughput of non-containerized general cargo totalled 1.5 million tons, a downturn of eleven percent.

The positive general cargo throughput trend sufficed to compensate for a fall in bulk cargo handling. After a strong performance in the previous year, this fell by 1.3 percent or 575,000 tons to 44.9 million tons in 2016. With throughput of 22.0 million tons slightly – 1.3 percent – down on the previous year, the grab cargo category dominated this segment. Totalling 8.7 million tons, suction cargoes generally were 5.3 percent below the strong previous year. In 2016 liquid cargo throughput at 14.2 million tons was slightly – 1.4 percent – higher than in 2015.

## Hamburg's top ten trading partners in seaborne container traffic 2015/2016

RANK 2016 (prev. y.)	Trade Partner	CONTAINER (in 1,000 TEU)			
		2015	2016	Change	in%
1 (1)	China*	2,541	<b>2,582</b>	41	1.6
2 (3)	Russia	434	<b>453</b>	19	4.5
3 (2)	Singapore	436	<b>419</b>	-17	-3.8
4 (5)	USA	326	<b>363</b>	36	11.1
5 (4)	Finland	350	<b>361</b>	11	3.2
6 (7)	Malaysia	283	<b>286</b>	2	0.7
7 (6)	South Korea	315	<b>274</b>	-41	-12.9
8 (11)	Great Britain	219	<b>246</b>	28	12.6
9 (8)	Sweden	271	<b>243</b>	-29	-10.6
10 (10)	India	237	<b>241</b>	5	2.0
	<b>Total</b>	<b>5,412</b>	<b>5,469</b>	<b>57</b>	<b>1.0</b>
	other countries	3,409	<b>3,438</b>	29	0.9
	<b>TOTAL:</b>	<b>8,821</b>	<b>8,907</b>	<b>86</b>	<b>1.0</b>

## Top 10 Destinations in container traffic Seaborne and hinterland traffic 2015/2016

RANK	Destination	CONTAINER (in m. TEU)		
		2015	2016	Change%
1	China*	2.54	<b>2.58</b>	1.6
2	Bavaria	0.75	<b>0.76</b>	1.3
3	Lower Saxony	0.49	<b>0.50</b>	2.0
4	Czech Republic	0.46	<b>0.49</b>	6.5
5	North Rhine-Westfalia	0.46	<b>0.48</b>	4.3
6	Russia	0.43	<b>0.45</b>	4.5
7	Singapore	0.44	<b>0.42</b>	-3.8
8	Baden-Wuerttemberg	0.39	<b>0.39</b>	1.3
9	Poland	0.41	<b>0.37</b>	-9.7
10	USA	0.33	<b>0.36</b>	11.1

\* incl. Hong Kong

Source: HPA / Port of Hamburg Marketing

### Seaborne Cargo Handling in Ports of the North Range, january – december 2016

PORT	Total (1,000t)	Change prev. year %	Bulk cargo (1,000t)	Change p. y. %	Gen. cargo (1,000t)	Change p. y. %	Containers (1,000t)	Change p. y. %	Containers TEU	Change p. y. %
<b>HAMBURG</b>	138,171	0.3	44,921	-1.3	93,250	1.0	91,717	1.2	8,906,817	1.0
<b>BREMEN PORTS</b>	74,157	1.0	10,073	-1.9	64,084	1.4	56,774	2.8	5,488,999	-1.0
<b>ROTTERDAM</b>	461,177	-1.1	305,820	-2.1	155,357	0.9	127,064	0.6	12,385,168	1.2
<b>ANTWERP</b>	214,058	2.7	81,775	1.6	132,282	3.4	117,910	4.1	10,037,318	4.0
<b>TOTAL</b>	<b>887,562</b>	<b>0.2</b>	<b>442,589</b>	<b>-1.3</b>	<b>444,973</b>	<b>1.7</b>	<b>393,464</b>	<b>2.1</b>	<b>36,818,302</b>	<b>1.6</b>

All weights in this table are gross (weight of cargo plus weight of empty container)  
Source: Port Authorities, preliminary data

### HINTERLAND TRANSPORT

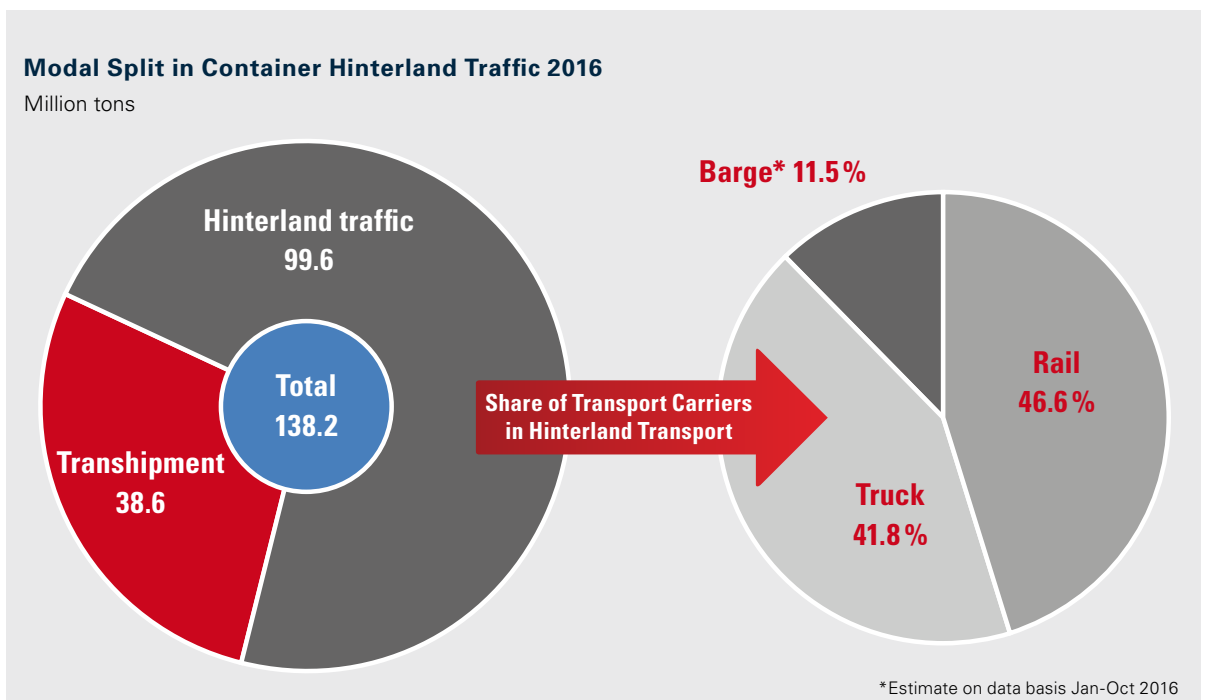
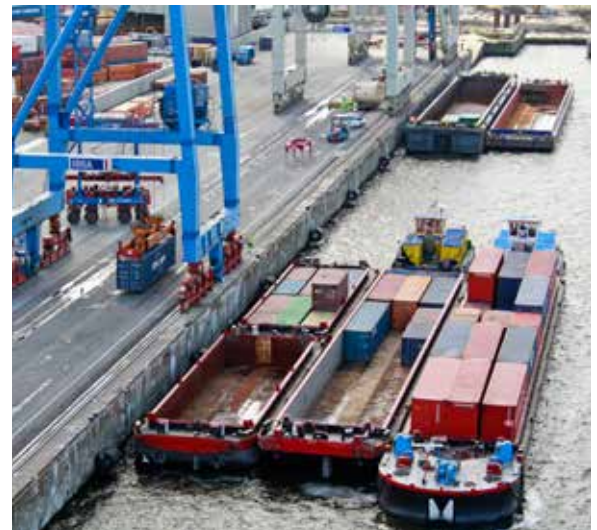
In 2016 seaborne cargo transport to or from the hinterland totalled 99.6 million tons, with containers transported numbering 5.6 million TEU.

Last year a total of around 46.4 million tons of freight and 2.4 million standard containers (TEU) were transported in the Port of Hamburg’s hinterland, representing increases of 1.5 percent and 2.4 percent respectively. Rail was therefore on a record course, even topping the truck as a carrier for freight traffic generally.

In 2016 inland waterway craft transported freight totaling 11.5 million tons between Hamburg and inland waterway ports. Hamburg therefore remains Germany’s second largest inland waterway port. On container transport, the year’s throughput was 119,000 TEU, a total only exceeded back in 2008.

In 2016 the modal split on hinterland transported shifted further from trucking to rail. The latter’s share in hinterland container transport has risen to 42.3 per-

cent. Container transport by inland waterway craft still represents 2.1 percent of the modal split. The proportion of containers transport by truck declined to the present 55.6 percent.



## MARKET AND ACTIVITY REPORTS

# Germany

Shippers and forwarders from all over the country use the dense network of worldwide liner services via Hamburg for global distribution of their import and export freight. All regions are superbly linked with the Port of Hamburg via efficient multimodal terminals. While around 80 percent of container shipments between Hamburg and North Rhine-Westphalia are transported by truck, rail is the dominant carrier in many other German states.

### WEST GERMANY

Cultivation of the market in North Rhine-Westphalia, the Port of Hamburg's second most important market region in container transport, centred on the topic of seaport-hinterland traffic. In April 2016, the North Rhine-Westphalian Ministry of Transport presented its new port & logistics scheme for the NRW market region, providing among other things for improvement of the link with the Port of Hamburg. That is also desired by businesses in the Port of Hamburg. With around 500,000 TEU being transported annually and such pronounced import and export flows, NRW offers optimal conditions for optimizing rail freight transport.

The challenges and potential involved in the expansion of rail freight traffic between Hamburg and the regions of NRW in the next few years were the core topics at the information function in Münster as well as the Port Evening in Düsseldorf. Hinterland transport logistics are also very significant for Lower Saxony with its Hanover region, and were the focus of the briefing event in Hanover.

In addition, Port of Hamburg Marketing, along with member companies and partners, held a Port Evening in Dortmund as well as the 'Future of Sea Freight in South Westphalia' networking evening in Wilnsdorf. All these events offered shippers, carriers and forwarders the opportunity to establish new contacts with our members and others business representatives from the Port of Hamburg, and to strengthen existing business links.

HHM representative Volker Hahn participated in diverse seminars and congresses and was involved in discussion and working groups of the Hanover and Dortmund chambers of industry and commerce. To cite two examples: The Ninth BME/VDV Forum on Rail Freight Traffic in Bonn and the Eighth NRW Shipping/Port/Logistics Forum in Duisburg. Involvement in diverse logistics associations in North Rhine-Westphalia in 2016 made a positive impact on recognition of Hamburg as a port location.



### EASTERN GERMANY

The topic of seaport-hinterland transport, especially in the inland shipping sector, also remains of tremendous significance in Eastern Germany. Takeover of responsibility for the Port of Hamburg's Inland Waterway Craft Working Group facilitated the combination of members' activities in this area, so far comprising an active exchange of views on inland waterway shipping topics under the label 'Elberadar', with those of other players in the Port of Hamburg. HHM representative Stefan Kunze was actively engaged during 2016 in his function as Chairman of the Elbe Alliance, in representing inland waterway shipping interests in the advisory body for the Overall Elbe Concept (GKE). This aims to lay the foundation for the upgrading of this waterway. He also represented the Hamburg Metropolitan Region within his network, participating in various discussions and working groups. The 'Berlin/Leipzig Maritime' event format was retained in 2016 and is seen as an established discussion group for forwarders in Brandenburg and Central Germany. The Elbe trip organized jointly with the Saxony Ports on the Upper Elbe, the Haldensleben Ports Conference, the Port Evening in Berlin as well as the Duck Dinner at Hamburg Heavy Cargo Terminal in Dresden offered shippers, carriers and forwarders an opportunity for establishing new contacts with members companies and other business representatives from the port, and of expanding existing links.

Stefan Kunze presented Hamburg as a universal port at various events, including In-Rail-Cargo Chemnitz and the Central German Logistics Forum in Leipzig, successfully expanded his network by taking part in various parliamentary evenings, and assisted member companies in cultivating the market.

Stefan Kunze's lectures at Glauchau and Gera vocational schools provided guidance for the upcoming generation in the logistics sector. In addition, his involvement in such as EU projects as EMMA and NSBCoRe supported the work of Port of Hamburg Marketing's project department.



” 3 QUESTIONS TO

**... STEFAN KUNZE, Head of the Port of Hamburg's Representative Office for Eastern Germany in Dresden and Chairman of Elbe Alliance**

In its German catchment area, more than 16,000 jobs depend directly or indirectly on access to the Elbe. The Elbe Shipping Survey commissioned by the German states of Saxony-Anhalt, Hamburg, Brandenburg and Saxony in 2016 underlined the importance of the Elbe. For around 30 percent of companies questioned, navigability of the Elbe is essential for their business activity and hence for their survival. Stefan Kunze champions the Elbe's growing importance as a transport route. To this end, he contributed directly to the GKE - Overall Elbe Concept.

**?** Which in your opinion constitute the crucial points in the GKE that will contribute to the growing importance of the Elbe as a whole?

The GKE has brought decisions on the operational parameters and hydraulic engineering measures for

the maintenance of Elbe, so that in the coming years the river plus its lateral canals can be expanded into a through waterway between the German border and Geesthacht, just E. of Hamburg. Specific examples here are the problematical sections between Dömitz and Hitzacker, and Mühlberg and the mouth of the Saa-le. This upgrading will benefit shipping – and hence the entire economy – and the Port of Hamburg.

**?** Good hinterland infrastructure is indispensable for successful port operation. Not only road and rail play an essential part here – inland waterway shipping is also of great importance. How would you assess its status in relation to the Port of Hamburg and its connected ports?

In terms of hinterland transport, the inland waterway craft accounts for 11.5 percent of the Port of Hamburg's total cargo handling, making it an indispensable carrier. For transport of liquid bulk cargoes, the inland waterway craft even tops rail, while it is often the only conceivable means of transport for plant shipments. Despite some faults, primarily with the Scharnebeck Ship Lifts, important industrial centres in Central Germany are well linked with the Port of Hamburg via the Elbe and the Elbe Lateral Canal. For Czechia, the river is the sole route to the North Sea and so of great importance.

**?** To what extent do members of the association actually profit from your work and activities for the Elbe?

I use targeted information functions to familiarize shippers in the region with the Elbe as a transport route. Both in the Hamburg Metropolitan Region and along the Upper and Lower Elbe, our members profit directly from this. In addition, my activities as Chairman of the Elbe Alliance and in various advisory councils and working groups represent our members' interests vis-à-vis the transport industry and related official policy. As a member of the GKE advisory body I was able to contribute directly towards the preservation of an essential transport link – since the Port of Hamburg is the most favourably located seaport, being directly accessible via the Elbe.

## SOUTHERN GERMANY, SWITZERLAND

Although competing ports – Rotterdam and Antwerp in the NW as well as Genoa and Trieste in the South – have built up their presence in Southern Germany, the Port of Hamburg was able to further consolidate its excellent position as a logistics hub in overseas trade to and from Bavaria, not least through an intensification of rail links. In Nuremberg and Burghausen, new regular block-train services were offered and/or departure frequency increased. Port of Hamburg Marketing's cultivation of the market was therefore focussed on hinterland traffic, and especially Hamburg's accessibility by rail to and from Bavaria, Baden-Württemberg and Switzerland.

HHM representative Jürgen Behrens attended intensively to the rail industry as well as customers and shippers in markets and informed them over the diversity of services provided by Hamburg as a port and logistics centre. In furtherance of the projects for the improvement of the rail freight transport link along the Eastern corridor being promoted by the Bavarian Ministry of the Interior, Building & Transport, Jürgen Behrens actively supported LKZ Prien, a lead partner. The challenges in hinterland transport were also the keynote topic of a briefing session run by Port of Hamburg Marketing along with its member TFG Transfracht. Additional events were the traditional networking

functions, New Year receptions in Stuttgart, Munich and Nuremberg that for years now have gained outstanding acceptance from both the regional logistics sector and Port of Hamburg Marketing member companies. In addition, Port of Hamburg Marketing along with DAKOSY organized an event for the Bavarian logistics industry on the topic of digital products in the Customs clearance field.

Jürgen Behrens was involved as a presenter and facilitator in events, conferences and trade fairs, successfully expanding his network. Examples included the Ninth Innovative Logistics Symposium in Prien, Logistics & Distribution 2016 in Zurich, SSC Seaborne Freight Seminar in Interlaken and the ASE Forum 'Freight Transport 4.0' in Karlsruhe.

Apart from cultivating the market, in particular Jürgen Behrens was active for the upcoming generation in logistics, delivering talks and lectures during 2016 at the Baden-Württemberg Cooperative State University in Mannheim as well as schools of transport studies in Munich and Ulm.

In all the market regions of Germany and Switzerland, Port of Hamburg Marketing organized company visits for its members, introduced contacts with potential business partners, supplied market and sector data, and handled market analyses as commissioned.



**MARKET AND ACTIVITY REPORTS**

# Central and Eastern Europe

**For the countries of Central and Eastern Europe, the universal Port of Hamburg is first choice for handling their foreign trade goods. Through the increasing activities of the competing ports of Koper, Trieste and Rijeka, as well as the Polish ports that are particularly active in Czechia and Slovakia, ongoing presence in the markets of Central and Eastern Europe is of real significance.**



## **CZECHIA AND SLOVAKIA**

Czechia and Slovakia count among the most important markets for the Port of Hamburg, also fulfilling an important hub function. Almost 500,000 containers were transported in 2016 between the Port of Hamburg and Czechia / Slovakia. The fact that almost 90 percent of these import and export containers were carried by environment-friendly rail, is made possible by the 120 scheduled container trains between the intermodal terminals in Czechia and Slovakia and container terminals in the Port of Hamburg.

During the year, the Czech government actively lobbied other governments and the EU to maintain the navigability of the Elbe, increasing its use as an inland waterway. The aim is to ensure constant year-round navigability of the fairway. Port of Hamburg Marketing supported the Czech partner and member companies, particularly by cooperating with the Elbe/Oder chamber union and the Elbe Allianz association.

During 2016, HHM representatives Bohumil Prusa and Vladimir Dobos were active in working groups at the German-Czech Chamber of Commerce in Prague and the German-Slovakian chamber in Bratislava. They were also active in Czech and Slovak trade associations organizing and supporting conferences and events. In October, the Port Evening took place in Prague. At the traditional networking event some 250 guests, including customers, forwarders and shipowners from Czechia and Slovakia, as well as member companies and other representatives from the Hamburg port sector, exchanged views on the latest developments in the logistics and transport field.

The two representatives were involved in giving presentations and facilitating at events and conferences in the market regions, stressing the vast range of services available in the Hamburg port and logistics hub. Several examples were: SpeedCHAIN 2016 International Logistics Conferences in Prague (CZ) and Modrá (SK), Czech Logistics Day as part of the European Supply Chain Day and the Czech forwarders association's Maritime Club.

To promote the upcoming generation, Port of Hamburg Marketing organized a study tour for young forwarders from Czechia and Slovakia, who gained insights into logistics processes in Hamburg und Lübeck. In addition, both representatives accompanied shippers and forwarders travelling to Hamburg with their staff or customers for expert discussions and tours of operations.

## **AUSTRIA**

Nurturing and enhancing personal contacts are of great relevance in Austria.

During the year, Port of Hamburg Marketing's representative in Austria, Alexander Till, presented member companies' vast range of services in some 200 meetings with decision-makers from the Austrian transport sector.

In 2016, Port of Hamburg Marketing organized three events in Austria. The Port Evening in Vienna attracted more than 250 guests to Austria's largest event in the maritime field. The two briefing events in Vienna and Krems gave representatives from the Austrian transport and logistics sector the opportunity to make new contacts to member companies from Hamburg's port industry, as well as developing existing business relationships. The briefing events were jointly organized with the Port of Vienna, Mierka Donauhafen Krems, and METRANS (Danubia) Krems.

A visit by a delegation to Hamburg was organized by Port of Hamburg Marketing's Vienna representative office and jointly run with the Industrial Association. CEO's and logistics managers from 15 companies in the fields of vehicle technology, timber, casings, crane construction, cable car construction, piping, container handling, terminal operators, electrical goods wholesalers and logistics participated in the two-day visit for experts.

Member companies from Hamburg were supported by Alexander Till during their customer visits to Austria.



Alexander Till held specialist presentations on the topic of sea freight and promoting Hamburg as a port location. This included events such as the Powerdays run by the logistics network association in Vienna, Steyr, Tirol, Vorarlberg and Graz, as well as at the European rail summit in Vienna. This approach reached hundreds of interested listeners throughout the country.

In addition to cultivating the market, Alexander Till especially promoted the upcoming logistics generation in Austria, holding lectures and presentations this year at the technical colleges of Bildungsinstitut BFI Vienna and Steyr and at vocational schools in Vienna, Braunau and Mitterdorf.

Rounding off this commitment was the organisation of study tours to Hamburg for students from the technical college of Bildungsinstitut BFI Vienna accompanied by Alexander Till, Vienna University of Economics and Business Administration, Vorarlberg and Steyr technical colleges and the Logistikum research institute in Steyr.

## HUNGARY

Excellent hinterland infrastructure and well-oiled logistics chains make the Port of Hamburg an attractive market partner in Hungary. With two percent growth, the Hungarian economy again remained on an upward trend in 2015. As a result the Port of Hamburg also recorded a handling increase of containerized freight to/from Hungary. To support this positive development, Krisztina Kovacs, head of the Port of Hamburg Marketing Representative Office in Budapest, intensively cultivated the Hungarian market: Because of its

geographical position this is characterized by strong competition from the southern ports. Her activities include continually nurturing and developing contacts in numerous industrial and trading companies, the transport and logistics field, as well as business organisations and political decision-makers.

In 2016, the Port Evening in Budapest was again the most significant and best visited event for Hungary's logistics sector. Together with Ingo Egloff, Joint CEO of Port of Hamburg Marketing, Krisztina Kovacs welcomed some 220 guests from Hungary, Germany, Austria and Slovakia. The event once again provided an ideal platform to compare notes on the latest developments in the Port of Hamburg, as well as in Hungary's logistics and transport sector. Together with the Internet platform Logisztika.com, Port of Hamburg Marketing held a conference on the state of the transport business in Hungary in September 2016.

During the year, Krisztina Kovacs visited transport and logistics conferences, specialist forums, plus customer briefing events held by competing ports, successfully building up her network.

Port of Hamburg Marketing promoted the upcoming generation in the Hungarian transport and logistics sector through study tours, lectures and teaching material. In October, jointly with the Hungarian forwarders association, Krisztina Kovacs organized a study tour for young professionals to Hamburg. During their two-day stay the participants gained insights into the importance of the Port of Hamburg in global trade, logistics processes in the terminals and port management.

## CENTRAL AND EASTERN EUROPE WORKING GROUP (MOER)

### 'Supra-national market cultivation: a real plus for the Port of Hamburg'

The Central and Eastern European region consisting of Austria, Czechia, Slovakia and Hungary counts among the most important markets for the Port of Hamburg. For containerized transport to and from the region, pre- and on-carriage for overseas shipments is almost exclusively by rail. To achieve maximum exploitation of this transport capacity, supra-national hinterland transport schemes are increasing in importance. Port of Hamburg Marketing has taken up this development in its market cultivation. The MOER working group was already founded in 2015, with the Representative Offices in Budapest, Prague and Vienna working out supra-national sales and marketing concepts. During 2016, MOER region market, transport and competition



analyses were compiled and statistics evaluated. This data is the prerequisite for analysing freight and traffic flows in the entire region. The working group's activities are an important cornerstone for further positive developments in volume between the Port of Hamburg and the Central European hinterland. In addition to commercial delegation visits to Hamburg, in the coming years international events with members and customers are planned in the markets.

MARKET AND ACTIVITY REPORTS

# Baltic region

With a 20 percent share of the Port of Hamburg’s container throughput, the Baltic region is the second strongest contributor here after the East Asia trade. As an overseas port, Hamburg performs a vital function as a distribution hub for feeder cargo across Northern Europe and the Baltic region. The Port of Hamburg scores through its geographical proximity to markets there plus its dense network of feeder liner services. After the previous year had proved challenging, in 2016 this trade of such importance for the Port of Hamburg saw cargo volumes tending to stabilize.



In 2016, container transport between Hamburg and the Baltic region remained at the previous year’s level of 1.8 million TEU. In the previous year, even in Hamburg weak demand caused by the serious recession in the Russian economy and stronger competition in the transshipment segment caused a notable (22.6 percent) decline in volumes in container transport with the Baltic region.

In 2016 Hamburg’s strongest trading partner in the Baltic was once again **Russia**. In worldwide terms, with 453,000 TEU in 2016, after China the country was again the Port of Hamburg’s second-ranking partner for container throughput. After a distinct (34.4 percent) downturn in volume in 2015, last year these stabilized and started to pick up again with growth of 4.5 percent. The 2016 upturn in this trade was powered by imports. At 204,000 TEU, these gained a distinct 10.7 percent, attributable to loaded containers, which increased by a disproportionate 19.1 percent to 164,000 TEU.

In the Baltic region, **Poland** takes fourth place as a trading partner for the Port of Hamburg. In this neighbouring country, direct calls at Gdansk and competition for transshipment cargo depressed the volume trend for

seaborne cargoes in Hamburg. In 2016, 214,000 TEU were handled via Hamburg by sea with Poland, or 9.7 percent fewer than in the previous year.

Volumes via **Lithuania** as a Baltic state grew unusually strongly. In 2016 volume handled in Hamburg rose by 31.0 percent to 117,000 TEU – a new record for Hamburg. The reason is an additional service operated from July 2015 in the CKYHE alliance by Yang Ming.

In 2016 **Sweden** was Hamburg’s ninth strongest trading partner for container transport, taking third place in the Baltic region after Finland. With volume 10.6 percent down on the previous year, 243,000 TEU were still handled in Hamburg. The downturn is attributable to recent direct calls by East Asia services at Gothenburg. These caused potential volumes for transshipment to circumvent the main ports in the Northern Range. It became apparent in the course of 2016 that the volume involved was settling down at a low level.

## MARKET ACTIVITIES

The Baltic region was always regarded as natural hinterland for the Port of Hamburg. Yet this is a fact that is in-

creasingly changing. Many states on the Baltic, such as Poland, Sweden and Russia, for example, are increasingly developing their own ports, to market these in the medium term as regional handling hubs. For instance, in 2016 container handling in Polish seaports grew by over 9 percent. Compared to Gdynia with a 6.3 percent drop, with its container throughput up by almost 20 percent, the Port of Gdansk emerged as the clear pacesetter.

For Port of Hamburg Marketing, it is therefore of immense importance to be active in the markets, joining selected partners in consolidating the Port of Hamburg's presence and market positioning. In 2016, for example, fresh event formats were offered in new regional markets. Against the background of trade sanctions and the tense situation in Russia, Latvia's foreign trade developed astonishingly steadily thanks to increases with the USA, China and EU countries. Many member companies are active in Latvia or maintain intensive business links with companies there. To cultivate such relationships and forge new ones, Port of Hamburg Marketing joined the Port of Liepaja, the Freeport of Riga Authority and the Freeport of Ventspils Authority in issuing invitations to a German-Latvian Maritime Forum. The event was also the occasion for a joint conference, at which representatives of the ports of Hamburg, Liepaja, Riga and Ventspils informed guests about current developments in the transport and logistics market as well as future alliances.

Prior to the Port Evening in St. Petersburg, the traditional networking event in Russia, a delegation from the Hamburg Metropolitan Region visited the universal Port of Bronka. St. Petersburg's new deepwater port entered service at the end of 2015. Participants were briefed on plans for further development and the new handling facility's strategic importance for future cargo flows between the Russian Federation and Germany.

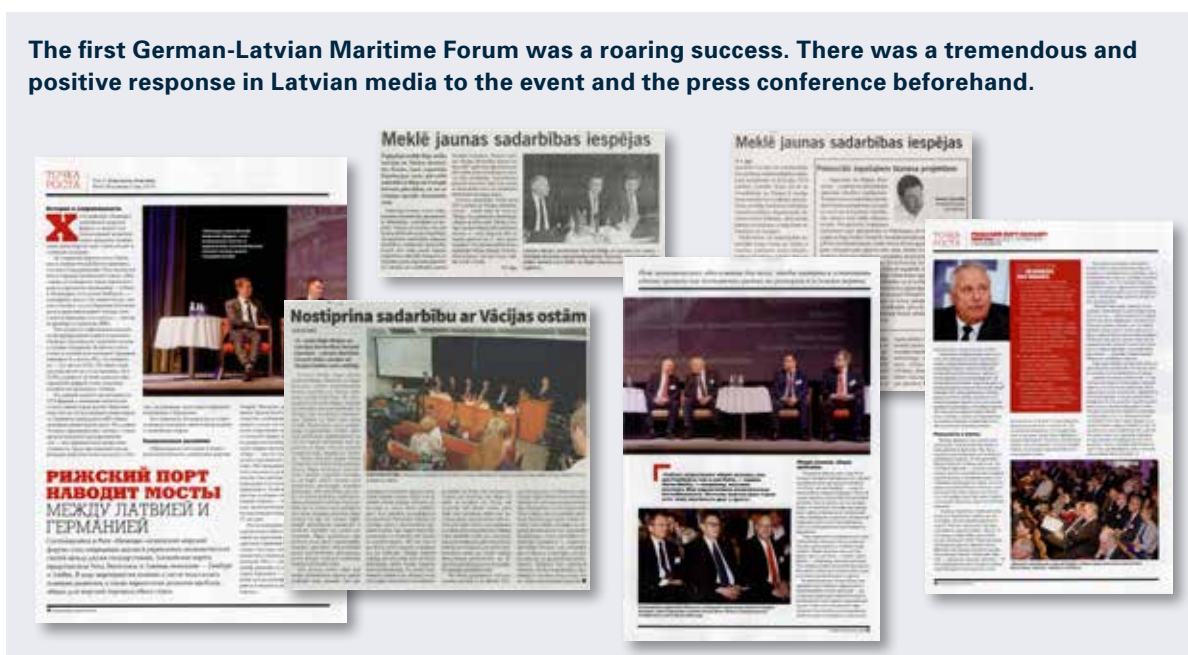
Port of Hamburg Marketing also ran a series of events in Poland, offering shippers and forwarders the opportunity of making new contacts with member companies and other representatives of Port of Hamburg business and for expanding existing links. Among the highlights in Poland were the Port Evening in Warsaw, as well as the information sessions 'The Port of Hamburg for Insiders' in Katowice and Warsaw, as part of which members companies spoke on special topics and introduced transport and IT solutions.

Represented by Marina Basso Michael, HHM's Head of Market Development for the Baltic Region/Eastern Europe, Maciej Brzozowski, its Representative for Poland, and Natalia Kapkajewa, Representative for Russia, Port of Hamburg Marketing delivered lectures and facilitators for events and conferences in the Baltic region. They showcased the diversity of services in Hamburg as a port and logistics centre as well as the latest developments and projects there.

For member companies, Port of Hamburg Marketing organized company visits, events, participation in conferences and tours by delegations in the Baltic states. HHM also arranged contacts with potential business partners, supplied market and sector data, and handled market analyses as commissioned. In addition, HHM representative Maciej Brzozowski supported the work of Port of Hamburg Marketing's Project Department with his expertise on the EU's EMMA project, which is designed to promote and further develop inland waterway shipping in the Baltic region.

In Poland, in 2016 Port of Hamburg Marketing catered handsomely for the upcoming generation in the logistics sector, with Maciej Brzozowski giving lectures on the Port of Hamburg in 2016 at leading universities in Warsaw.

**The first German-Latvian Maritime Forum was a roaring success. There was a tremendous and positive response in Latvian media to the event and the press conference beforehand.**



MARKET AND ACTIVITY REPORTS

# Asia

Asia traditionally belongs to Hamburg’s strongest trade route and so in 2016 its seaports were among the pacesetters on container traffic with Hamburg. With 4.74 million TEU, around 53 percent of Hamburg’s total container throughput was discharged or loaded for a source or destination region in Asia. The total was up by 1.3 percent on the previous year. Asian companies appreciate the universal port of Hamburg for its excellent links with its European hinterland.



With container throughput at around 2.6 million TEU, in 2016 the **People’s Republic of China (incl. Hong Kong)** was the Port of Hamburg’s top trading partner by a wide margin, accounting for 29 percent of total container throughput. That represented a 1.6 percent advance on the previous year. Due to a cooling off of demand, any enhanced momentum on this trade route will only occur medium term. This is also reflected in the quarterly trend in China’s foreign trade with the European Union.

In 2016 container traffic between Hamburg and **South Korea** was 12.9 percent lower at 274,000 TEU. This weakness reflects South Korea’s faltering economy and a decline in the NE Asian country’s foreign trade. According to the Bank of Korea, this year South Korea’s sluggish economy should grow by 2.7 percent compared to 2016. Other estimates are even lower.

Direct container traffic with the Port of Hamburg’s trading partner **India** totalled 241,000 TEU. Available data suggests that this is a new record in Hamburg, with throughput up by 2.0 percent compared to the previous year. This puts India in tenth place among the Port of Hamburg’s trading partners, as in the previous year. Container traffic between Hamburg and Sri Lanka must also be seen in the Indian market context. Part of the cargo for India is handled via the distributor port of Colombo in Sri Lanka. In 2016 container traffic with Sri Lanka achieved above-average growth of 27.0 percent in Hamburg. Throughput totalled 107,000 TEU, a new record for Hamburg after 102,000 TEU in 2005.

The trend was once again distinctly positive on Hamburg’s container traffic with the **United Arab Emirates (UAE)**. Up by an above-average 11.1 percent, traffic with this trading partner reached a new

record at 234,000 TEU. An expansion of capacity with larger vessels and the cooperation between UASC and China Shipping from May 2014 positively influenced the volume trend in Hamburg.

In 2016 direct container traffic between Hamburg and **Vietnam** also improved significantly. At 45,000 TEU, volume was up by a notable 62.2 percent. The previous record of 33,000 TEU set in 2012 (33,000 TEU) was therefore handsomely exceeded. Partly owing to expansion of capacity on the NE2 (CK(H)YE) and Loop 1 (G6) services with larger containerships, volumes were already rising relatively strongly back in 2014.

## MARKET ACTIVITIES

### CHINA

China as the Port of Hamburg's most important market is intensively cultivated by Port of Hamburg Marketing (HHM). Anne Thiesen acts as Representative for Hong Kong, Southern China and SE Asia, and Lars Anke as her opposite number for China, Japan and Korea. In June 2016 Port of Hamburg Marketing organized a delegation tour in China for member companies. Apart from visiting the transport logistic China trade fair in Shanghai, participants were offered an extensive programme of events and visits. Among these were expert discussions with representatives of leading Chinese import and export companies, along with the Port of Ningbo, Tianjin Port Group and Tianjin Free Trade Zone. A VIP reception with members of the major new shipping company China COSCO Shipping Group, the

Port of Shanghai, the Ministry of Transport, as well as leading shippers and forwarders, also offered a fine opportunity for strengthening existing contacts.

In October Port of Hamburg Marketing and exhibiting member companies once again showcased for the general public at the China International Logistics and Transportation Fair (CILF) in Shenzhen. Axel Mattern, Port of Hamburg Marketing's Joint CEO and representatives of Hamburg Port Authority also took the opportunity of participating in the World Ports Strategy Forum and a dinner during the TPM Asia Conference. The trade fair was also the occasion for Port of Hamburg Evenings in Guangzhou and Hong Kong for players in the local maritime sector.

Anne Thiesen contributed speeches and presentations at events and conferences in Southern China on the diversity of services in Hamburg as a port and logistics centre. She also successfully expanded her network by attending a variety of other functions. Among the highlights was the Motor Vehicle/Vessel Emissions Control Workshop 2016, or MoVE, organized by Hong Kong Polytechnic University and the Hong Kong Ministry of the Environment. Axel Mattern, Port of Hamburg Marketing's Joint CEO, was also present to speak about the development of the Port of Hamburg into a smartPORT. From both the economic and ecological viewpoint, the Port of Hamburg is regarded as exemplifying a successful port operation in an urban environment.

Among the venues for Lars Anke with speeches on the Port of Hamburg's strengths were Break Bulk Asia



**MARKET AND ACTIVITY REPORTS**

**HAMBURG PORT BUSINESS DELEGATION VISITS CHINA**

The mix of Port of Hamburg information events to promote their own services and tours of leading Chinese industrial, commercial and logistics companies proved a complete success for the companies making the trip.



*On Monday, 13 June the delegation held a discussion with representatives of Shanghai UBI Logistics (China) Ltd.*



*The 'Port of Hamburg - leader for specialized logistics' workshop on the afternoon of the same day was a 'sell-out' with 75 representatives of Chinese companies, offering all those present the opportunity of business discussions followed by networking activity.*



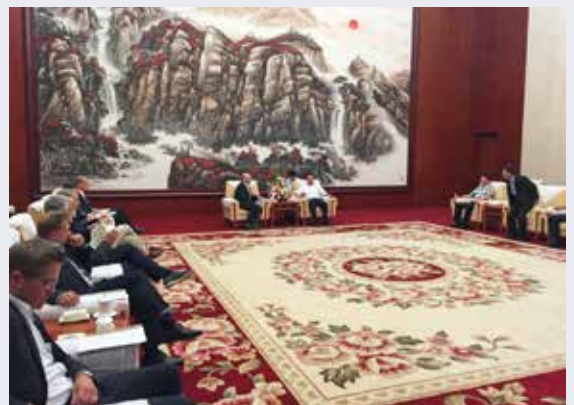
*A visit to Tianjin Free Trade Zone was on the programme for Thursday, 16 June*



*In the morning the Dongjiang Free Trade Zone was presented to members of the delegation.*



*Valuable contacts were made at the ensuing round-table discussions with representatives of export and logistics companies from the Tianjin Free Trade Zone.*



*The delegation was welcomed by the Deputy Governor of the Tianjin Binhai New Area, Chan Ze-Feng, in the afternoon.*

in Shanghai, the Ningbo Silk Road Forum, Port Development Forum, the Qingdao Port Conference, Intermodal Asia, the Green Logistics Forum in Hangzhou and the International Port Conference in Lianyungang. He held discussions with potential alliance partners and customers for the Port of Hamburg in the course of visits to Lanzhou, Chengdu, Wuhan, Jiashan, Tianjin, Qingdao and Beijing. On the basis of on-the-spot appointments met by members of the Shanghai Representative Office, analyses were also compiled on the trend of Chinese foreign trade flows in the context of the 'new normal' for the Chinese economy, and on the development of Chinese domestic logistics in the inland waterway shipping and rail transport sectors.

Prepared and organized by the Shanghai and Hong Kong Representative Offices, in July and October 2016 agreements on cooperation were signed with the ports of Ningbo and Qingdao, as well as Guangzhou, with special reference to the Port of Hamburg's smartPORT strategy.

Special articles were published in various media on the significance of Port of Hamburg. The Representative Office in Shanghai also issued monthly press releases on the latest developments in the Port of Hamburg and at HHM member companies to the Chinese press.

In 2016 visits by various Chinese delegations to Hamburg, for example Qingdao Port Authority, the Tianjin Free-Trade Zone and the Chinese Ministry of Transport, underlined the close relations existing between the two countries.

Heavy demand persisted from members companies for advice. The focus was on developments in the recently established free-trade zones in various Chinese cities, also on support in contractual disputes with Chinese business partners, arranging contacts, start-up advice, and statistical data.

## INDIA

In 2016 Peter Deubet, Representative for India, cultivated and intensified contacts in the transport industry, with shippers, forwarders and liner agents, successfully building up Port of Hamburg Marketing's network.

Through its Representative Office in Mumbai, Port of Hamburg Marketing participated in events with speeches and presentations, highlighting Hamburg's service diversity as a port & logistics powerhouse. One highlight was 'Maritime Nation India 2016', held in Navi-Mumbai. High-ranking players in the maritime sector were there. In addition, Maritime India Summit 2016 and the Annual General Meeting of the German-Indian Chamber of Commerce offered decision-makers from the Indian port & logistics sector the opportunity of exchanging views.

In 2016 the activities of the Representative Office also included publication of special articles in leading media, computation of the statistical data and handling enquiries from members. The office also supported a visit by a delegation from the HSBA Hamburg School of Business Administration by organizing company visits and a tour of Mumbai Port Trust.

In India, special value is placed on cultivating and expanding personal ties. In 2016, Peter Deubet showcased the service portfolio of seaport businesses in Hamburg during speaking dates for decision-makers in the Indian transport industry.

## SOUTH KOREA

Namyeon Lee, HHM Representative for South Korea, visited numerous Korean shippers, shipping companies and forwarders to promote the Port of Hamburg's diversity of services. Other salient activities in cultivating the market included monitoring and analysis of export cargo flows from such major Korean companies as Samsung, LG and Hyundai/KIA.

In 2016 the Representative Office also published special articles in such renowned media as 'Korea Logistics News', Korea's largest logistics and shipping magazine.

On behalf of Port of Hamburg Marketing, Namyeon Lee delivered speeches and made presentations at events and conferences in South Korea, promoting the Port of Hamburg's diversity of services as a port & logistics centre. As a feature of HHM's commitment to the upcoming generation in logistics, as a guest speaker he gave a lecture at Pyeongtaek University about the Port of Hamburg and its efficient hinterland links.

On account of market changes, the Port of Hamburg's Representative Office in South Korea was closed on 31 December 2016.



# Port of Hamburg Marketing Representative Offices

**At a total of twelve locations, Representative Office staff look after the interests of Hamburg's seaport transport business, especially those of member companies, in what are important markets for the Port of Hamburg. The Baltic Region / Eastern Europe and Asia / Overseas market regions are additionally handled from the Hamburg Headquarters.**

## HEADQUARTERS

### Market Development Baltic Sea Region / Eastern Europe

Marina Basso Michael  
Phone: +49 40 37709 111  
E-Mail: basso-michael@hafen-hamburg.de

### Market Development Asia / Overseas

Mathias Schulz  
Phone: +49 40 37709 114  
E-Mail: schulz@hafen-hamburg.de

## GERMANY

### Representative Office Eastern Germany

Dresden Representative  
Stefan Kunze  
Phone: +49 351 6538 131  
E-Mail: stefan.kunze@hafen-hamburg.de

### Representative Office Southern Germany

Munich Representative  
Jürgen Behrens  
Phone: +49 89 186097  
E-Mail: behrens@hafen-hamburg.de

### Representative Office Western Germany

Dortmund Representative  
Volker Hahn  
Phone: +49 231 9839 9695  
E-Mail: hahn@hafen-hamburg.de

## INTERNATIONAL

### Representative Office Austria

Vienna Representative  
Alexander Till  
Phone: +43 1 712 54 84  
E-Mail: till@hafen-hamburg.de

### Representative Office Poland

Warsaw Representative  
Maciej Brzozowski  
Phone: +48 22 654 60 07  
E-Mail: brzozowski@hafen-hamburg.de

### Representative Office Russia

St. Petersburg Representative  
Natalia Kapkajewa  
Phone: +7 812 3327140  
E-Mail: kapkajewa@hafen-hamburg.de

### Representative Office Czechia / Slovakia

Prague Representative  
Vladimir Dobos  
Phone: +420 224 891 301  
E-Mail: dobos@hafen-hamburg.de

### Representative Office Hungary

Budapest Representative  
Kristina Kovacs  
Phone: + 36 1266 2039  
E-Mail: kovacs@hafen-hamburg.de

### Representative Office India

Mumbai Representative  
Peter Deubet  
Phone: +91 22 666 52 134  
E-Mail: Peter.deubet@hamburgmumbai.com

### Representative Office China, Japan, Korea

Shanghai Representative  
Lars Anke  
Phone: +86 21 5386 0857  
E-Mail: anke.lars@hamburgshanghai.org

### Representative Office Hong Kong, South China, South-East Asia

Hong Kong Representative  
Anne Thiesen  
Phone: +852 2522 5268  
E-Mail: anne@annethiesen.com.hk

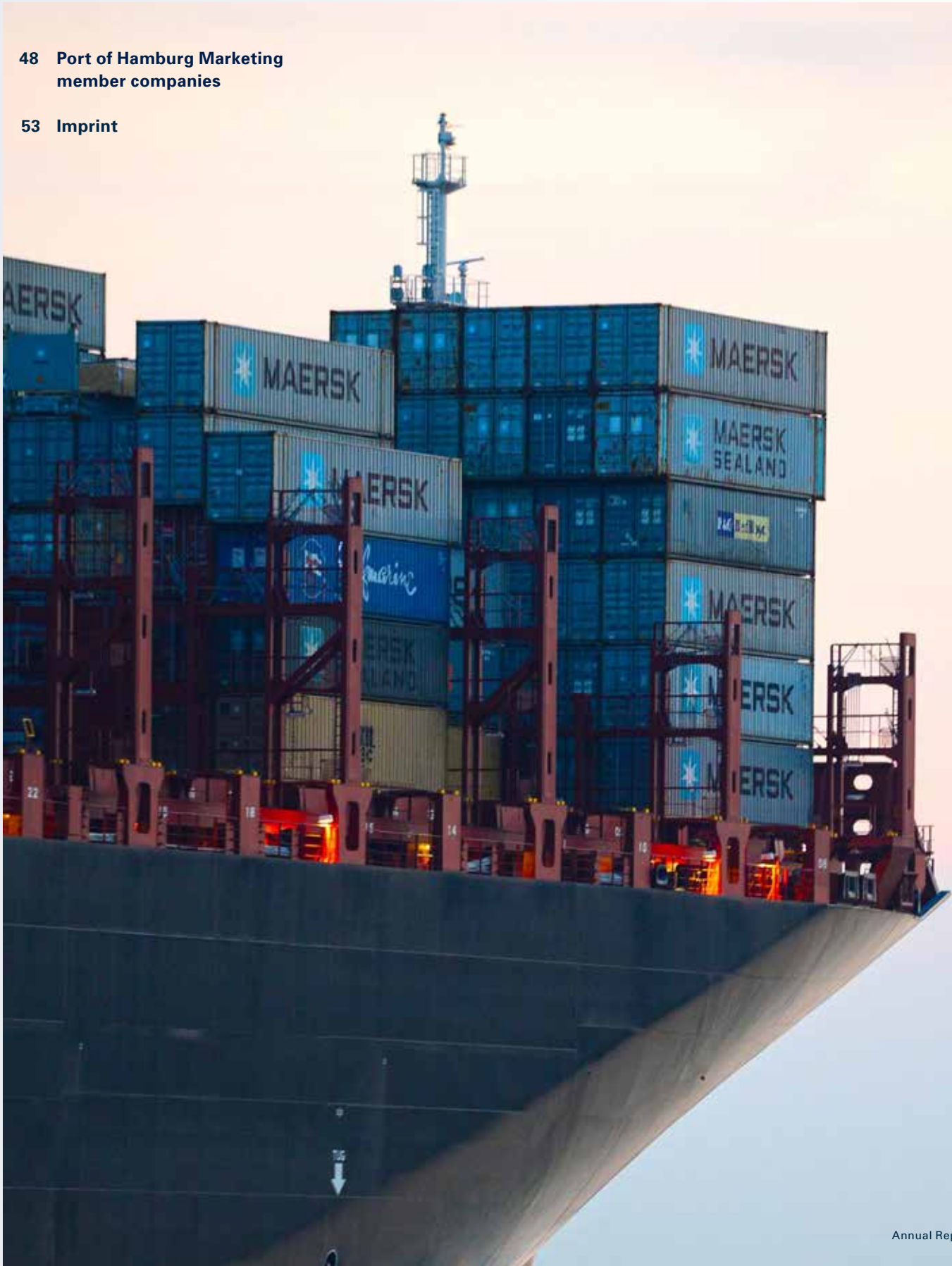


# ADDITIONAL INFORMATION

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member companies

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# Port of Hamburg Marketing member companies

**The Port of Hamburg is Germany's largest universal port. Its strength and competitive ability is especially thanks to the companies active here in the port in transportation, logistics and industry. Many of these companies are members of Port of Hamburg Marketing.**

## A

a. hartrodt Deutschland (GmbH & Co) KG	www.hartrodt.com
ACL Atlantic Container Line Deutschland GmbH	www.aclcargo.com
ADECON Sp. z o.o. Sp.K.	www.adecon.pl
ADM Hamburg Aktiengesellschaft	www.adm.com
Advanced World Transport a.s.	www.awt.eu
ajax Loktechnik GmbH & Co. KG	www.ajax-loktechnik.com
ALC Timber Worxx Packaging GmbH	www.timber-worxx.de
Alcotrans Container Line GmbH	www.alcotrans.nl/de/standorte
Alfons Köster & Co. GmbH	www.alfons-koester.de
APL Co. (Germany)	www.apl.com/germany
ARIVIST Logistics Overseas GmbH	www.arivist.com
Arnold Koch jr. GmbH	www.arnold-koch.de
ATG Alster-Touristik GmbH	www.alstertouristik.de

## B

Baltic Rail Gate GmbH	www.baltic-rail-gate.de
Baltica-Trans	www.baltica-trans.ru
Barkassenbetrieb Bülow GmbH	www.barkassenvermietung-hamburg.com
Barkassen-Centrale Ehlers GmbH	www.barkassen-centrale.de
BEHALA Berliner Hafen- und Lagerhausgesellschaft mbH	www.behala.de
BOBE Speditions GmbH	www.bobe.de
Bomin Linde LNG GmbH & Co. KG	www.bominlinde.com
boxXpress.de GmbH	www.boxxpress.de
BREEZE Industrial Packing GmbH	www.breeze-packing.com
Brunsbüttel Ports GmbH	www.brunsbuettelports.de
BSPartner GmbH & Co. KG	www.bspartner.de
Bugsier- Reederei- und Bergungsges. mbH & Co.	www.bugsier.de
Buss Capital GmbH & Co. KG	www.buss-capital.de
Buss Group GmbH & Co. KG	www.buss-group.de
Buss Hansa Terminal GmbH & Co. KG	www.buss-ports.de
Buss Port Logistics GmbH & Co. KG	www.buss-ports.de
BUSS Ross Terminal GmbH & Co. KG	www.buss-ports.de
Buss Sea Terminal Sassnitz GmbH & Co. KG	www.buss-sts.de
Buss Shipping GmbH & Co. KG	www.buss-group.de
Buss Terminal Stade GmbH & Co. KG	www.buss-ports.de

## C

C. Steinweg (Süd-West Terminal) GmbH & Co. KG	www.csteinweg.de
Captrain Deutschland GmbH	www.captrain.de
Carl Robert Eckelmann Transport und Logistik GmbH	www.eckelmannag.de
Carl Wolter GmbH	www.carl-wolter.de
CBT Logistics GmbH	www.cbtham.de
C-Delta GmbH	www.c-delta.com
CENEP Group SE	www.cenep-group.com
Česko-saské přístavy, s. r. o. Děčín	www.csp-labe.cz
CIS-Cargo GmbH	www.cis-cargo.de
CLC China Logistic Center GmbH	www.china-logistic-center.de
CMA CGM (Germany) GmbH	www.cma-cgm.com
COLI Schifffahrt & Transport GmbH & Co. KG	www.coli-shipping.com
Color Line GmbH	www.colorline.de
CONDACO & KTD-M GmbH	www.condaco.de
CONICAL GmbH	www.conical.de
Contargo GmbH & Co. KG	www.contargo.net
COSCO SHIPPING Lines (Europe) GmbH	www.coscoshipping.de
ČSPL a.s.	www.cspl.cz
CST Container-, Speditions- u. Transportges. mbH	www.cst-container.com
CTD Container-Transport-Dienst GmbH	www.ctd.de
CTS Container Terminal Salzburg GmbH	www.ct-sbg.at

<b>D</b>	
DAKOSY AG . . . . .	www.dakosy.de
DAL Schifffahrts-Agentur mbH & Co. KG . . . . .	www.rantzau.de
DB Netz AG . . . . .	www.dbnetze.com/fahrweg
DCP Dettmer Container Packing GmbH & Co. KG . . . . .	www.dcp-hamburg.de
Delfs & Associates GmbH . . . . .	www.delfs-associates.com
deugro (Deutschland) Projekt GmbH . . . . .	www.deugro.com
Deutsch-Chinesische Wirtschaftsvereinigung e.V. . . . .	www.dcw-ev.de
Deutsche Binnenreederei AG . . . . .	www.binnenreederei.de
Deutscher Tarifeur-Verein e.V. . . . .	www.dtvev.de
Deutsch-Russischer Wirtschaftsbund e.V. . . . .	www.deutsch-russischer-wirtschaftsbund.de
DFDS Seaways Baltic GmbH . . . . .	www.dfdsdisco.de
DHL Global Forwarding GmbH . . . . .	www.dhl.de
Dolezych GmbH & Co. KG . . . . .	www.dolezych.de
Dortmunder Hafen AG . . . . .	www.dortmunder-hafen.de
DVWVG Bezirksvereinigung Hamburg . . . . .	www.dvwg.de
<b>E</b>	
ECE Projektmanagement G.m.b.H. & Co. KG . . . . .	www.ece.de
Eichholtz GmbH . . . . .	www.eichholtz.de
Eimskip Deutschland . . . . .	www.eimskip.com
Elbe Allianz e.V. . . . .	www.elbeallianz.org
ElbePort Wittenberge GmbH . . . . .	www.elbeport.de
ELBREKLAME Marketing und Kommunikation EMK GmbH . . . . .	www.elbreklame.de
Emons Air & Sea GmbH . . . . .	www.emons.de
Emons Rail Cargo GmbH . . . . .	www.emons.de
EMR European Metal Recycling GmbH . . . . .	www.emrgroup.com
EPS ESTE PROJECT SERVICE GmbH . . . . .	www.eps-hamburg.de
Ernst Glässel GmbH . . . . .	www.glaessel.de
ERS Railways B.V. . . . .	www.ersrail.com
Eurofins Umwelt Nord GmbH . . . . .	www.eurofins.de
EUROGATE Intermodal GmbH . . . . .	www.egim.eu
European Cargo Logistics GmbH . . . . .	www.ecl-online.de
European River-Sea-Transport Union e. V. . . . .	www.erstu.com
Evergreen Shipping Agency (Europe) GmbH . . . . .	www.evergreen-line.com
Evropská vodní doprava-Sped. s. r. o. . . . .	www.evd.cz
<b>F</b>	
FENIX LLC . . . . .	www.port-bronka.ru
FILog Forschungsgemeinschaft Innovative Logistik e.V. . . . .	www.filog.org
Finnhub ry . . . . .	www.finnhub.fi
FONTENAY Consulting & Assekuranz-Makler GmbH . . . . .	www.fontenay-assekuranz.de
Forschungsgemeinschaft für Logistik e.V. . . . .	www.fglhamburg.de
Fr. Meyer's Sohn (GmbH & Co.) KG . . . . .	www.fms-logistics.com
Fracht FWO Polska Sp. zo.o. . . . .	www.frachtfwo.pl
Fraunhofer-Institut für Fabrikbetrieb und -automatisierung . . . . .	www.iff.fraunhofer.de
Friedrich A. Kruse jun. Internationale Spedition e.K. . . . .	www.spedition-kruse.de
FRIGO Coldstore Logistics GmbH & Co. KG . . . . .	www.frigo-hamburg.de
<b>G</b>	
G.T.H. Getreide Terminal Hamburg GmbH & Co. KG . . . . .	www.getreide-terminal.de
GCD Glomb Container Dienst GmbH . . . . .	www.glomb.com
Geodis Wilson Germany GmbH & Co. KG . . . . .	www.geodiswilson.com
Gerd Buss Stevedoring GmbH . . . . .	www.buss-ports.de
Gerlach Zolldienste GmbH . . . . .	www.gerlachcs.de
Gesamtverband Schleswig-Holsteinischer Häfen e.V. . . . .	www.haefen-sh.de
GHB Gesamthafenbetriebs-Gesellschaft mbH . . . . .	www.ghb.de
GLA German Liner Agencies GmbH . . . . .	www.glagencies.de
Glückstadt Port GmbH & Co. KG . . . . .	www.glueckstadtport.de
Grimaldi Germany GmbH . . . . .	www.grimaldi-germany.de
GRIMEX Trade & Logistics GmbH . . . . .	www.grimex-tl.com
<b>H</b>	
H.D.Cotterell GmbH & Co. KG . . . . .	www.cotterell.de
H.S.H. Schleppgesellschaft mbH . . . . .	www.hsh-hamburg.de
HACKLIN Deutschland GmbH . . . . .	www.hacklin.fi
HADAG Seetouristik und Fährdienst AG . . . . .	www.hadag.de
Hafen Akademie Hamburg GmbH . . . . .	www.hafenakademie.de
Hafen Hannover GmbH . . . . .	www.hannover-hafen.de
Hafenbetrieb Aken GmbH . . . . .	www.hafen-aken.de
Hafenbetriebsgesellschaft Braunschweig mbH . . . . .	www.braunschweig-hafen.de

HafenCity Hamburg GmbH	www.hafencity.com
Hafenkultur e.V.	www.hafenkultur.eu
Hafenschiffahrtsverband Hamburg e.V.	www.uvvh.de
Halifax Port Authority	www.portofhalifax.ca
Hamburg Cruise Center e.V.	www.hamburgcruisecenter.de
Hamburg Marketing GmbH	www.marketing.hamburg.de
Hamburg Messe und Congress GmbH	www.hamburg-messe.de
Hamburg Südamerikanische Dampfschiffahrts-Gesellschaft KG	www.hamburg-sued.com
Hamburger Hafen und Logistik Aktiengesellschaft	www.hhla.de
Hamburger Sparkasse AG	www.firmenkunden.haspa.de
Handelskammer Hamburg	www.hk24.de
HANSA Heavy Lift GmbH	www.hansaheavylift.com
HANSAPORT HAFENBETRIEBSGESELLSCHAFT MBH	www.hansaport.de
Hanseatic Cruise Staff Service GmbH	www.hanseatic-cruise-staff.de
Hanseatic Tally Service GmbH	www.hanseatic-tally.de
Hapag-Lloyd AG	www.hapag-lloyd.de
HCCR Hamburger Container u. Chassis-Reparatur GmbH	www.hccr.de
HEINRICH KRÖGER Container Transport & Logistik GmbH	www.kroeger.biz
Heinrich Osse Lagerhaus GmbH	www.osse-logistik.de
Heinrich Wegener & Sohn Bunkergesellschaft m.b.H.	www.wegener-bunker.de
HHLA Container Terminal Altenwerder GmbH	www.hhla.de
HHLA Container Terminal Tollerort GmbH	www.hhla.de
HHLA Frucht- und Kühlzentrum GmbH	www.hhla.de
HLG Hamburger Lasch GmbH & Co. KG	www.hamburglasch.de
HLS Eurocustoms24 Zollservice GmbH & Co.KG	www.eurocustoms24.de
HMS Hanseatic Marine Services GmbH & Co. KG	www.hms-services.com
HÖEGH Autoliners GmbH	www.hoegh.com
HPA Hamburg Port Authority AöR	www.hamburg-port-authority.de
HPC Hamburg Port Consulting GmbH	www.hpc-hamburg.de
HPTI Hamburg Port Training Institute GmbH	www.hpti.de
HTAG Häfen und Transport AG	www.htag-duisburg.de
Hyundai Merchant Marine (Deutschland) GmbH	www.hmm21.com

**I**

iCON International Container Service GmbH	www.icon-container.com
Identec Solutions AG	www.identecolutions.com
IFB International Freightbridge (Deutschland) GmbH	www.ifb-germany.de
IGS Schreiner GmbH	www.igs-logistics.com
IMPERIAL Shipping Services GmbH	www.imperial-baris.de
IMPORT PARTNER Internationale Zollspedition GmbH	www.import-partner.de
IMS CARGO Austria GmbH	www.imscargo.com
Initiative Kiel-Canal e.V.	www.initiative-kiel-canal.de
Institut für BFSV a. d. Hochschule f. Angewandte Wissenschaften Hamburg	www.bfsv.de
IPS International Packing Services GmbH	www.ips-hh.de
Ixocon GmbH	www.ixoccon.de

**J**

Jungheinrich AG	www.jungheinrich.de
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**K**

„K“ Line (Deutschland) GmbH	www.klineurope.com
Karl Gross Internationale Spedition GmbH	www.karlgross.de
Kewill GmbH	www.kewill.com
Konrad Zippel Spediteur GmbH & Co. KG	www.zippel24.com
KPMG AG Wirtschaftsprüfungsgesellschaft	www.kpmg.com
KRONE FLEET Deutschland GmbH	www.krone-fleet.com
Kuehne Logistics University	www.the-klu.org

**L**

LHG Service-Gesellschaft mbH	www.sg-luebeck.de
Lindner Fotografie	www.lindner-fotografie.de
Linz Service GmbH – Hafen Linz	www.hafenlinz.at
Logistik-Initiative Hamburg e.V.	www.hamburg-logistik.net
LogistikNetz Berlin-Brandenburg e. V.	www.logistiknetz-bb.de
Louis Hagel GmbH & Co. KG	www.louis-hagel.com
Lübeck Distribution Gesellschaft mbH	www.ldg.de
Lübecker Hafen-Gesellschaft mbH	www.lhg.com

**M**

ma-co maritimes kompetenzentrum GmbH	www.ma-co.de
MACS Linienagentur GmbH	www.macship.com

Maersk Deutschland A/S & Co. KG	<a href="http://www.maerskline.com">www.maerskline.com</a>
MARITIME Cargo Logistics GmbH	<a href="http://www.maritimegroup.de">www.maritimegroup.de</a>
Maritime Circle Line	<a href="http://www.maritime-circle-line.de">www.maritime-circle-line.de</a>
MARITIME LNG PLATTFORM e. V.	<a href="http://www.lng-info.de">www.lng-info.de</a>
Maritimes Cluster Norddeutschland	<a href="http://www.maritimes-cluster-nord.de">www.maritimes-cluster-nord.de</a>
Marlière & Gerstlauer executive search	<a href="http://www.marliere-gerstlauer.com">www.marliere-gerstlauer.com</a>
MARSH GmbH	<a href="http://www.marsh.de">www.marsh.de</a>
Mattson Containers GmbH	<a href="http://www.mccontainers.com">www.mccontainers.com</a>
mdrk Trusted Advisers Group Sp. zo.o.	<a href="http://www.mdrk.eu">www.mdrk.eu</a>
METRANS a.s.	<a href="http://www.metrans.cz">www.metrans.cz</a>
Mindener Hafen GmbH	<a href="http://www.mindener-hafen.de">www.mindener-hafen.de</a>
MOL (Europe) B.V.	<a href="http://www.molpower.com">www.molpower.com</a>
MSC Germany SA & Co. KG	<a href="http://www.msccgermany.com">www.msccgermany.com</a>

**N**

NAVIS Schiffahrts- und Speditions-Aktiengesellschaft	<a href="http://www.navis-ag.com">www.navis-ag.com</a>
Netzwerk Logistik Leipzig-Halle e. V.	<a href="http://www.logistik-leipzig-halle.net">www.logistik-leipzig-halle.net</a>
Nippon Express (Deutschland) GmbH	<a href="http://www.nipponexpress.com">www.nipponexpress.com</a>
NORD Event GmbH	<a href="http://www.nordevent.de">www.nordevent.de</a>
Nordic Rail Service GmbH	<a href="http://www.nordic-rail-service.de">www.nordic-rail-service.de</a>
NORGATEC Handelsgesellschaft mbH	<a href="http://www.norgatec.de">www.norgatec.de</a>
Notariat Spitalerstrasse	<a href="http://www.notariatspitalerstrasse.de">www.notariatspitalerstrasse.de</a>
NSA Schifffahrt und Transport GmbH	<a href="http://www.nsa-hamburg.de">www.nsa-hamburg.de</a>
NYK LINE (Deutschland) GmbH	<a href="http://www.nykeurope.com">www.nykeurope.com</a>

**O**

Oiltanking Deutschland GmbH & Co. KG	<a href="http://www.oiltanking.com">www.oiltanking.com</a>
OPDR GERMANY GmbH	<a href="http://www.opdr.de">www.opdr.de</a>
ORCA Transport Agency GmbH	<a href="http://www.orca-transport.de">www.orca-transport.de</a>
Osteuropaverein der deutschen Wirtschaft e.V.	<a href="http://www.osteuropaverein.org">www.osteuropaverein.org</a>

**P**

Paul Grimm GmbH & Co. KG	<a href="http://www.paulgrimm.de">www.paulgrimm.de</a>
PCH Packing Center Hamburg GmbH	<a href="http://www.pchpacking.de">www.pchpacking.de</a>
Peter W. Lampke GmbH & Co. KG	<a href="http://www.pwl.de">www.pwl.de</a>
Petersen & Alpers GmbH & Co. KG	<a href="http://www.petersen-alpers.de">www.petersen-alpers.de</a>
PHH Personaldienstleistung GmbH	<a href="http://www.phh24.de">www.phh24.de</a>
planwerk elbe GmbH	<a href="http://www.planwerkelbe.de">www.planwerkelbe.de</a>
POHL & CO. GmbH	<a href="http://www.pohlgruppe.de">www.pohlgruppe.de</a>
POLZUG Intermodal GmbH	<a href="http://www.polzug.de">www.polzug.de</a>
Porath Customs Agents GmbH	<a href="http://www.porath.com">www.porath.com</a>
Port of Gothenburg AB	<a href="http://www.portofgothenburg.com">www.portofgothenburg.com</a>
Přístav Pardubice, a.s.	<a href="http://www.pristav-pardubice.cz">www.pristav-pardubice.cz</a>
PST CLC, a.s.	<a href="http://www.pst-clc.cz">www.pst-clc.cz</a>

**Q**

Quast & Cons. GmbH & Co. KG	<a href="http://www.quast-cons.de">www.quast-cons.de</a>
Quehenberger Air & Ocean GmbH	<a href="http://www.quehenberger.com">www.quehenberger.com</a>

**R**

Rail Cargo Operator - ČSKD s.r.o.	<a href="http://www.railcargooperator.cz">www.railcargooperator.cz</a>
RAINER ABICHT Elbrederei GmbH & Co.KG	<a href="http://www.abicht.de">www.abicht.de</a>
Reederei Ed Line GmbH	<a href="http://www.ed-line.de">www.ed-line.de</a>
Reinhold Bange (GmbH & Co.KG)	<a href="http://www.bange-hamburg.de">www.bange-hamburg.de</a>
REM CAPITAL AG	<a href="http://www.remcapital.de">www.remcapital.de</a>
REMAIN GmbH Container-Depot and Repair	<a href="http://www.remain.de">www.remain.de</a>
Rendsburg Port Authority GmbH	<a href="http://www.rendsburg-port-authority.de">www.rendsburg-port-authority.de</a>
RENDSBURG PORT GmbH	<a href="http://www.rendsburg-port.com">www.rendsburg-port.com</a>
REPACK Industrie-Verpackungs GmbH	<a href="http://www.repack.de">www.repack.de</a>
Rhenus Midgard Hamburg GmbH	<a href="http://www.rhenus.com">www.rhenus.com</a>
Rickmers-Linie GmbH & Cie. KG	<a href="http://www.rickmers-linie.com">www.rickmers-linie.com</a>

**S**

S&A Service und Anwendungstechnik GmbH	<a href="http://www.s-und-a.de">www.s-und-a.de</a>
Sächsische Binnenhäfen Oberelbe GmbH	<a href="http://www.binnenhafen-sachsen.de">www.binnenhafen-sachsen.de</a>
SACO Shipping GmbH	<a href="http://www.saco.de">www.saco.de</a>
Sallaum Lines Germany GmbH	<a href="http://www.sallaumlines.com">www.sallaumlines.com</a>
SAMSKIP GmbH	<a href="http://www.samskip.com">www.samskip.com</a>
Sandtorkai Handel Papenhagen KG	<a href="http://www.sandtorkai-handel.de">www.sandtorkai-handel.de</a>
Sartori & Berger GmbH & Co. KG	<a href="http://www.sartori-berger.de">www.sartori-berger.de</a>
Schiffsvermietung BARKASSEN-MEYER Touristik GmbH & Co.KG	<a href="http://www.barkassen-meyer.de">www.barkassen-meyer.de</a>

Schmidt-Ohm + Partner Werbeagentur GmbH	www.sop-hamburg.de
Schwarze & Consort. GmbH	www.schwarze-cons.de
Sea Master Shipping GmbH	www.seamastershipping.de
Seaco International Leasing GmbH	www.seacoglobal.de
Seaexpress Logistics GmbH	www.seaexpress.de
Securitas Gesellschaft für Seeverpackung mbH & Co. KG	www.securitas-gmbh.de
SECURITAS GmbH Sicherheitsdienste	www.securitas.de
SEEHAFEN KIEL GMBH & CO. KG	www.portofkiel.com
Seehafen Stade e.V.	www.seehafen-stade.de
SGKV - Studiengesellschaft für den Kombinierten Verkehr e.V.	www.sgkv.de
SGS Germany GmbH	www.de.sgs.com
Siemens AG	www.siemens.de
Silo P. Kruse Betriebs- GmbH & Co. KG	www.silo-p-kruse.de
SIS Internationale Spedition-GmbH	www.schaefer-sis.de
Skandic Service-Gesellschaft mbH	www.skandic-service.de
Softship AG	www.softship.com
STAQ Port Services GmbH & Co. KG	www.staq.de
STENA Line Scandinavia AB	www.stenalinefreight.com
STRABAG AG	www.strabag.de
SWOP Seaworthy Packing GmbH	www.swop.de

**T**

TB Logistik GmbH	www.tblogistik.com
TCI Transcontainer International Holding GmbH	www.mytcigroup.com
TCO TRANSCARGO GmbH	www.tco-transcargo.de
TCU GmbH & Co. KG	www.tcu.de
TEAM LINES Deutschland GmbH & Co. KG	www.teamlines.de
TFG Transfracht Internationale Gesellschaft f. kombinierten Güterverkehr mbH	www.transfracht.com
TRANSPORTWERK Magdeburger Hafen GmbH	www.magdeburg-hafen.de
TX Logistik AG	www.txlogistik.eu

**U**

UCA United Canal Agency GmbH	www.kiel-canal.de
UHH Umschlags- und Handelsgesellschaft Haldensleben mbH	www.uhh-haldensleben.de
UMCO GmbH	www.umco.de
UNICONSULT Universal Transport Consulting GmbH	www.uniconsult-hamburg.de
UniFeeder Germany - Branch of Unifeeder A/S	www.unifeeder.com
UNIKAI Lagerei- und Speditionsgesellschaft mbH	www.unikai.de
United Arab Shipping Company (UASC) Europe GmbH	www.uasc.net
United Depots Container Services GmbH	www.ctiedemann.de
Universal Transport Michels GmbH & Co. KG	www.universal-transport.com
Unternehmensverband Hafen Hamburg e.V.	www.uvh.de
USS United Shipping Services AB	www.uss.se

**V**

Vanguard Logistics Services Deutschland Schifffahrt und Transport GmbH	www.vls-global.com
Vattenfall Heizkraftwerk Moorburg GmbH	www.vattenfall.de/moorburg
Verein Hamburger Spediteure e.V.	www.vhsp.de
Verein Hamburgischer Quartiersleute von 1886 e.V.	www.uvh.de
Vereinigung Hamburger Schiffsmakler und Schiffsagenten e. V.	www.vhss.de
vesseltracker.com GmbH	www.vesseltracker.com
Vollers Hamburg GmbH	www.vollers.de
Vopak Dupeg Terminal Hamburg GmbH	www.vopak.com

**W**

W.E.C. Deutschland GmbH	www.weclines.com
Wallmann & Co. (GmbH & Co. KG)	www.wallmann-hamburg.de
Walter Lauk Ewerführerei GmbH	www.walterlauk.de
Werner Bruhns Lagereigesellschaft mbH	www.wernerbruhns.de
Wiener Hafen, GmbH & Co KG	www.hafenwien.com
Willis GmbH & Co. KG	www.willis.com

**Y**

Yang Ming Shipping Europe GmbH	www.yangming.com
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**Z**

ZIM Germany GmbH & Co. KG	www.zim-germany.com
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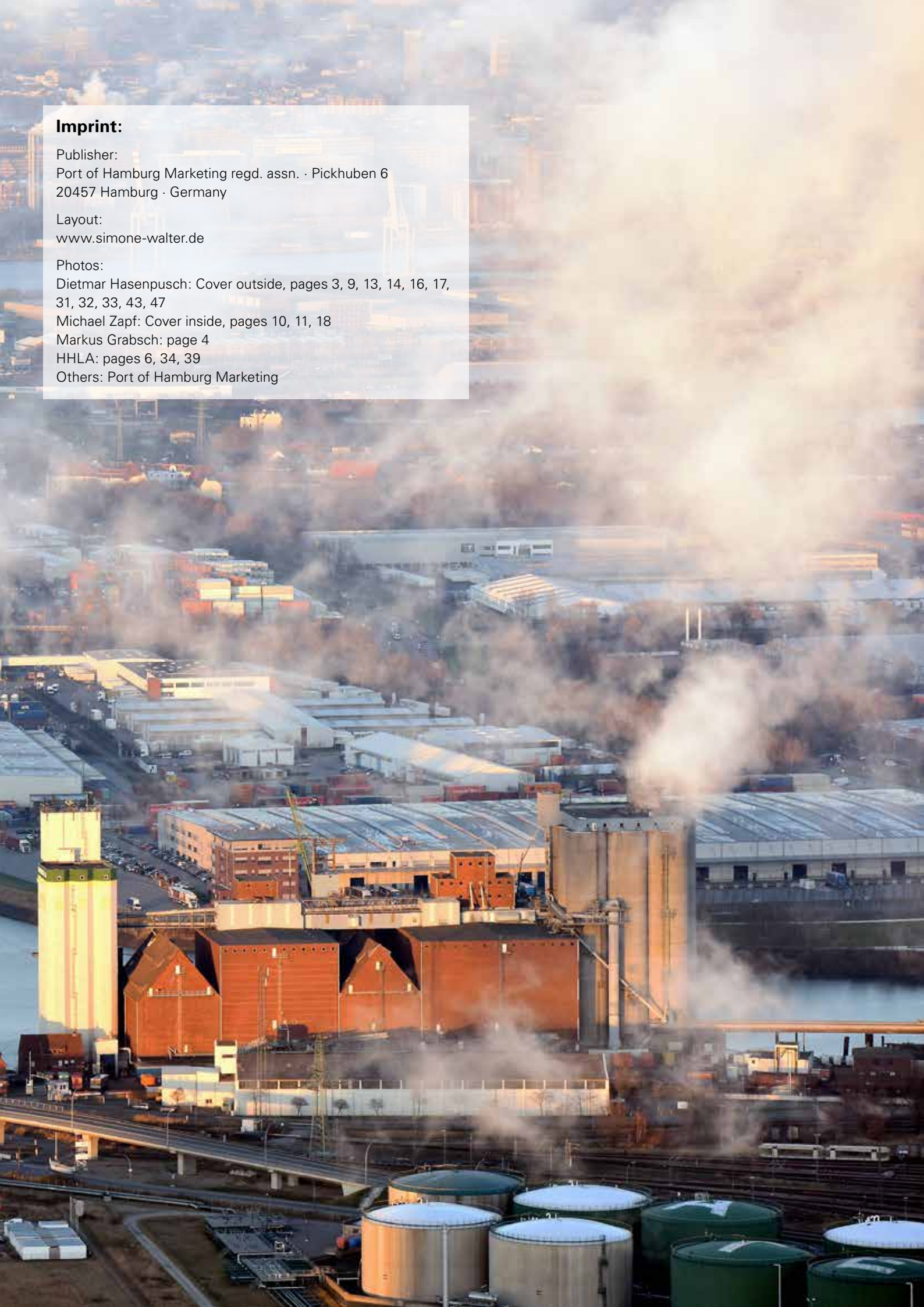
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Michael Zapf: Cover inside, pages 10, 11, 18

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Port of Hamburg Marketing Regd. Assn.  
Pickhuben 6 · 20457 Hamburg · Phone 040 37709-0 · Fax 040 37709-199  
Internet: [www.portofhamburg.com](http://www.portofhamburg.com) · e-mail: [info@hafen-hamburg.de](mailto:info@hafen-hamburg.de)