

December 2011

The magazine for our customers

interconnect



Ports of Auckland

Super City –
World Class Port

Excellence in Exporting

Rugby World Cup at
Home



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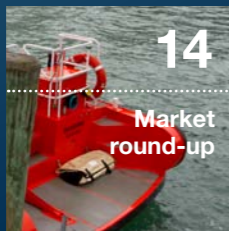
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Market round-up



POAL focus

September and October brought the Rugby World Cup to New Zealand and put Ports of Auckland in the global spotlight. As Auckland's port, we were thrilled to play a role in the success of the event and pleased with the support we received from both our staff and customers.

Tony Gibson
CEO Ports Of Auckland



Recent months have also been notable for the grounding of the *MV Rena* off the coast of the Bay of Plenty. POAL's staff, tugboat *Waka Kume* and the Seafuels barge *Awanuia* have been intimately involved in the salvage operation, under contract to salvor Svitzer.

In November we welcomed the *Waka Kume* and *Awanuia* back to Auckland and formally thanked the crew involved for their hard work. I have considerable personal admiration for them and for the salvors who continue to work on the vessel. Again, I need to acknowledge the patience and understanding of our bunker customers who needed to rearrange their plans, sometimes at short notice, to compensate for the absence of the *Awanuia* from Auckland. We're pleased to see her back in business for the busy summer months.



Market trends

The year has seen a number of changes in container shipping line services, including the introduction of the new CMA CGM ANZEX service. To date, Ports of Auckland has benefited from the changes, with a 3.9% increase in container volumes (TEU), and a 1.9% increase in trans-shipments for the July-September quarter.

Full import volumes have been strong compared with last year, due to a combination of market growth and earlier shipping of import volumes for the festive period than in past years, likely as a result of the Rugby World Cup.

Trade was also strong in other areas, with a 16.3% increase in vehicle imports and record high cruise ship bookings.

However, our overall operating environment remains extremely challenging. The latest indications are that after a strong October, container volumes are starting to taper off and the start of 2012 will be quieter than normal. The increase in vehicle imports is also expected to reverse following the introduction of a new emissions rule in 2012.

Industrial action

In late November, close to our print deadline for *Interconnect*, we received a strike notice from the Maritime Union of New Zealand - Local 13 (MUNZ). This was an extremely disappointing and somewhat surprising development, as over the course of this year we have worked hard to build a partnership with staff and the union.

The union has chosen, as it has many times in recent years, to take highly disruptive industrial action during one of the busiest periods in the shipping calendar.

We sincerely apologise for the inconvenience caused to our customers, local businesses and their customers here and abroad during this busy pre-Christmas trading period. We are working closely with the Port of Tauranga and KiwiRail to minimise the disruption to the supply chain.

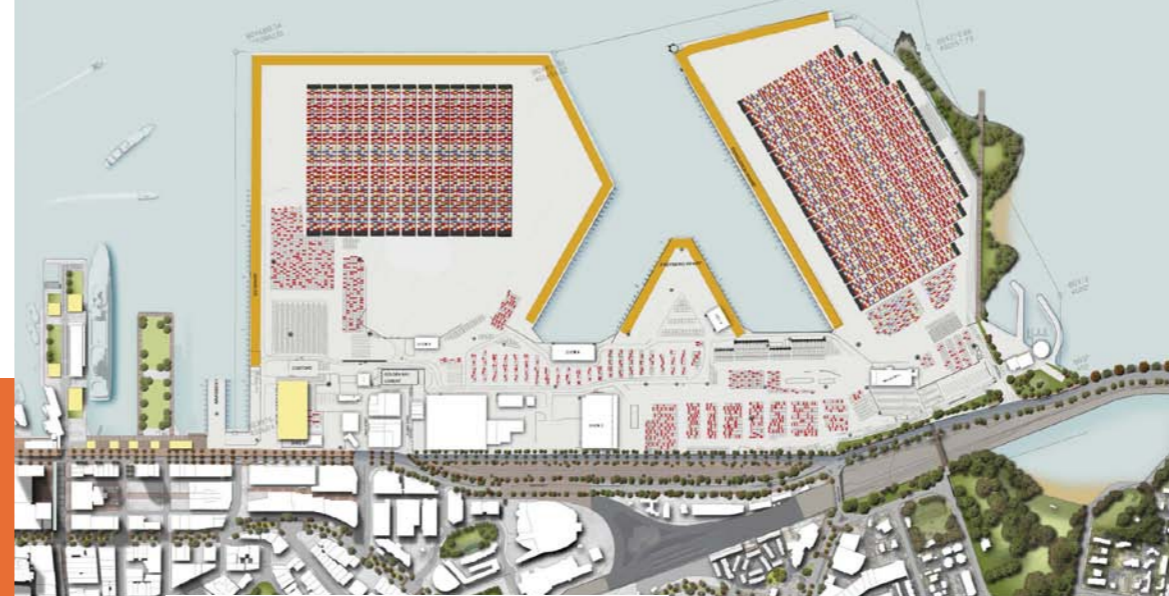
We will keep customers informed as the situation evolves and appreciate your support in these testing times.

I would like to thank our customers and other stakeholders for their continued support throughout the year. To all of you, to your colleagues and families, all of us here at Ports of Auckland wish you a very merry Christmas and a happy, healthy and successful 2012.

In early December we were disappointed to lose the Maersk Southern Star service, as a result of the industrial action. One of our major services, the loss represents 52 ship calls, 123,600 containers and nearly \$20m in revenue annually.



September 2011 heralded a new era in Auckland's history with the launch by Auckland Council of the draft Auckland Plan, Waterfront Plan, Auckland City Centre Masterplan and Economic Development Strategy.



waterfront development

Super City, World Class Waterfront, Growing Port

When finalised, these documents will shape the development of Auckland over the next 30 years and beyond. The Auckland Plan is a 30-year strategic document that identifies priorities for Auckland's future, and aims to deliver Mayor Len Brown's vision of making Auckland the world's most liveable city by 2040.

The draft Waterfront Plan, which like the Auckland Plan will be completed in early 2012, is a 30 year action plan that aims to unlock the potential of Auckland's CBD waterfront.

Waterfront Auckland Planning and Design Manager Rod Marler says Council's vision is for a waterfront that is a world class destination – a place that excites the senses and celebrates Auckland's sea-loving Pacific culture and maritime history.

"We want the waterfront to be a place that supports commercially successful and innovative businesses and is a place for all people – an area rich in character and activities that link people to the city and the sea."

Some of the most exciting proposed projects include:

- A waterfront pedestrian walkway and cycleway
- New beaches at St Mary's Bay and Teal Park
- A salt-water pool on Queens Wharf
- A canal at Wynyard Quarter
- Extending light rail from Wynyard Quarter to the CBD
- An inner-city rail loop
- A third harbour crossing.

PORT 2055+



PORT 2035-2040_28 YEARS



PORT 2015-2020_8 YEARS

The Auckland and Waterfront plans are particularly important to Ports of Auckland and General Manager Port Infrastructure Ben Chrystall says it is pleasing to see the strong recognition given to the port in the drafts of both documents.

"The Port is a key part of New Zealand's supply chain and both draft plans acknowledge the strategic role it plays in the regional and national economy," Mr Chrystall said.

"In Ports of Auckland's comments on the draft Plans we emphasised the importance of an efficient, growing Port to underpin the economic growth that will be needed if the proposed projects are to be affordable and achievable."

"We also gave specific feedback on the need to protect the port footprint from Bledisloe to Fergusson, and to provide for expansion by locking in the Port Management Area 1a for port activities (as set out in Regional Coastal Plan)."

Other points made by Ports of Auckland included the importance of:

- Protecting and enhancing Auckland's road and rail corridors for freight
- Protecting water space for ship access/manoeuvring
- Appropriate planning controls in areas surrounding the port and freight corridors
- Ensuring projects with transport implications are supported by rigorous traffic modelling.

At a briefing for customers and stakeholders as part of the draft Waterfront Masterplan consultation process in October 2011, Ports of Auckland released updated port development concept drawings.

These high-level drawings provide an insight into how the Auckland seaport could develop in the future, factoring in the substantial projected growth in the region's population and trade needs over time.

Mr Chrystall says the concept drawings aim to find the optimum balance of berth length and yard area to maximise the port's capacity, and to provide for both container and breakbulk cargo volumes in the eastern port.

One of the highlights of the plan is the possible release of Captain Cook wharf for public redevelopment, subject to the expansion of Bledisloe wharf.

"The release of the concept plans is the beginning of a comprehensive process of engaging with our customers and stakeholders about the future footprint and layout of the port," says Mr Chrystall. "We anticipate seeking further industry feedback and preparing an updated Port Development Plan document in 2012."

"I'd like to thank those of our customers and stakeholders who submitted in support of Ports of Auckland during the consultation process. These are exciting times for Auckland and it is good to see business having a voice in the process."

Ports of Auckland is 100% owned by Auckland Council Investments Limited, a Council Controlled Organisation of Auckland Council.

For fuller details of the updated port development concept drawings, see www.poa.co.nz

Two new reports by leading consultancy Market Economics shed light on the large economic role and impact of Ports of Auckland.

POAL Releases New Economic Impact Reports

The October 2011 reports found that Ports of Auckland was New Zealand's **largest and most important seaport**, handling 37% of the country's total seaport trade, and 31% of trade across all ports, including airports.

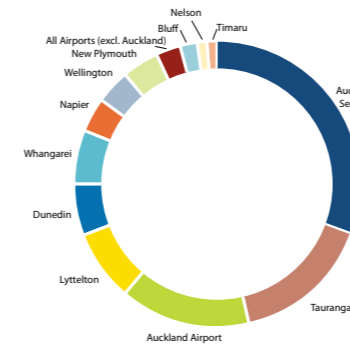
Ports of Auckland is also the country's **dominant cruise exchange port, vehicle import hub and container port**, handling 36% of the entire New Zealand container market and 60% of the upper North Island market.

Market Economics found that Ports of Auckland supported more than a fifth (22%) of the Auckland economy, and sustained 187,300 jobs. The total role of Ports of Auckland in the Auckland economy is \$12.5 billion of value added (equivalent to GDP).

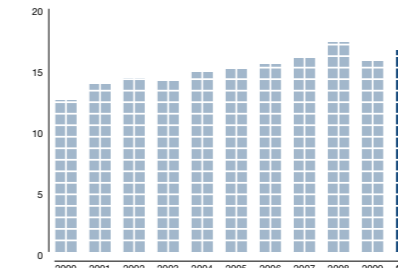
The value of trade through Ports of Auckland has increased by 41% since 2000, and 25% since 2005. (Since 2005 container volumes have increased by 39%).

During the 2009 global financial crisis, the value of imports through Ports of Auckland declined by 10% and then recovered to a level close to the post-recession highs. Export growth has been faster overall (57% growth since 2000) and with rapid growth in recent years (average annual growth of over 10% since 2005), due in large part to growth in dairy exports and to a lesser extent other food exports.

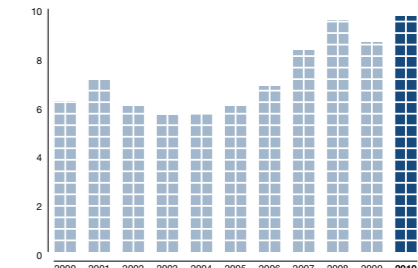
As well as estimating the role and impact of the port today, the reports give projections for 2021 and 2031, based on the economic growth targets in the draft Auckland Plan.



Share of trade value through NZ Sea and Airports, 2010



Imports through Ports of Auckland, \$b by calendar year



Exports through Ports of Auckland, \$b by calendar year

The key points in the reports, which are based on the 2010 calendar year, are:

- Approximately \$26.4 billion of trade passes through Ports of Auckland (POAL) each year, roughly 31% of New Zealand's total trade, and more than 90% more than the next largest by value (Port of Tauranga).
- The \$26.4 billion is made up of \$9.6 billion of exports and \$16.8 billion of imports. By value, POAL is New Zealand's largest port for both imports and exports.
- Of the \$16.8 billion of imports, \$12.1 billion (72%) are intermediate inputs which are further processed or manufactured elsewhere in Auckland or New Zealand, sometimes for re-export.
- 67% of POAL imports are destined for the Auckland market, next highest Waikato (9%).
- POAL is the largest export port in the country in value terms. Trade handled by POAL represents 25% of sea exports and 22% of total New Zealand merchandise exports by value, and 30 percent of sea exports by volume.
- 67% of POAL exports (by value) are sourced from within Auckland, next highest Waikato (12%).
- The total role of POAL in the Auckland economy in 2010 is \$12.5 billion of value added (equivalent to GDP) or 22% of the Auckland economy. This is equivalent to more than 187,000 jobs.
- In 2031, under the economic growth targets in the Auckland Plan, the total role of POAL in the Auckland economy will increase to \$42 billion of value added, or nearly 26% of the Auckland economy, equivalent to 628,000 jobs
- The total role of POAL in the New Zealand economy in 2010 is \$21.5 billion of value added (equivalent to GDP). This is equivalent to 336,000 jobs.
- In 2031, under the economic growth targets in the Auckland Plan, the total role of POAL in the New Zealand economy will be \$54 billion of value added. This is equivalent to 835,000 jobs.
- The upper North Island handles a large proportion of the country's entire trade – with some 68% of total New Zealand trade by value in 2010 being handled by Ports of Auckland (31%), the Port of Tauranga (16%), Auckland International Airport (15%) and Northport (6%). Between them, Ports of Auckland and Port of Tauranga handle 59.7% of the country's entire container market.

Market Economics also found that the cruise industry in New Zealand was highly dependent on Ports of Auckland.

Drawing on estimates of regional impacts from a 2010 study completed for the Ministry of Tourism and Cruise New Zealand, Market Economics were able to summarise the spend which occurs in Auckland as a result of the Port.

In that report the Auckland area was estimated to receive \$50.3m of cruise industry direct expenditure as a result of the Port's presence (excluding airfares and bunkering). The total effect of this injection into Auckland economy generated \$50.4m of value added (GDP) and 791 jobs in Auckland, and added value of around \$153 million to New Zealand.

For more information and copies of the full reports, see www.poal.co.nz.

Rugby World Cup Finds its Natural Home

The excitement of the 2011 Rugby World Cup is over and once again, New Zealand can claim to be the home of the Webb-Ellis Cup.

Ports of Auckland was heavily involved in both the behind-the-scenes planning for the activity on the Auckland waterfront, and the opening night spectacular. POAL was also closely engaged in ensuring a smooth experience for the four cruise ships that were in port, chartered especially for the semi-finals and finals weekends.

POAL Cruise Operations Manager Leigh Robins says while the port had handled multiple cruise ships visiting simultaneously in the past, this situation was unique and presented an unusual set of challenges, particularly around passenger handling. "Thanks to considerable advance planning and cooperation from all involved, everything went smoothly."

A highlight of the waterfront opening night celebrations was the orchestrated straddle 'dance' in which POAL Terminal Operations crews strutted their straddles' moves around cranes on Bledisloe Wharf where Ports of Auckland staff and family were supported by members of the Ngati Whatua tribe in the performance of the haka.

The evening sky lit up with the magnificent fireworks display while the port tugboats played a special role in the choreographed light show, dancing and shooting water into the sky, making for a truly awesome image seen worldwide.

Behind the scenes Ports worked with Auckland Council and customers to help provide a great experience for visitors to Auckland in 2011, including making space available for waterfront fan zones on Captain Cook and Marsden wharves, facilitating the loading of fireworks onto barges, and erecting a stack of containers which were wrapped to promote the opening night celebrations. A Giant Rugby Ball even made it onto Bledisloe Wharf.

The logistics involved behind the scenes were anything but straightforward and POAL is grateful for the understanding and support its customers showed during this time. Special thanks go to its Car Carrier customers and car transport companies who were tasked with removing vehicles from the central wharves in record time in between fan zone operating hours.

It was truly a team effort to rival the All Blacks on the pitch.

Excellence in Exporting



And the winners are...

Prominent stars at the 2011 inaugural Westpac Auckland Central Business Awards were **Temperzone Limited**, winner of the Ports of Auckland Excellence in Exporting category and **Buckley Systems Ltd (BSL)**, winner of the Excellence in Innovation award as well as top prize – the Westpac Auckland Central Supreme Business Excellence Award.

Ports of Auckland's GM Sales, Marketing and Logistics Craig Sain was delighted with the victories. "It was great to see two of our big exporters recognised in what was a very competitive awards programme," Mr Sain said. "We were also pleased to see a long-time Ports of Auckland supplier **Paramount Services**, led by Paul Brown, make the finals of the Excellence in Service Delivery and Excellence in Business Leadership categories. Our sincere congratulations go to the award winners and finalists."

Exporting over 80% of its production, much of it through Ports of Auckland, privately-owned Temperzone is New Zealand's longest established air-conditioning manufacturer. CEO Les Kendall said the award was recognition for the many years Temperzone has led the local industry and supported the local economy by exporting air conditioners to Australia, China and South East Asia.

Another Ports of Auckland export customer, BSL is a global leader in the manufacture and supply of precision electromagnets used in such applications as computer chips, flat screen televisions, whiteware, medical systems and particle accelerators.

Craig Sain said that the Awards were a reminder that while Ports of Auckland is a major import port it is also New Zealand's largest export port by value.

"In the 12 months to June 2011 Ports of Auckland handled exports worth NZ\$10b, with around two thirds of these coming from the Auckland region."

Other award winners included **Stevenson Engineering Limited**, **Foster Moore Ltd**, **International Travel College of New Zealand**, **Netball NZ Inc** and **Farro Fresh**. **Tony Coombe, CEO, Stevenson Engineering Limited**, won the Excellence in Business Leadership Award.

The other finalists in the Excellence in Exporting award category were **Cossiga Ltd**, **The Professional Bar and Restaurant School** and **Xlerate Technologies Ltd**.

The Awards competition was organised by the Auckland Chamber of Commerce. For more information see www.chamber.co.nz.

Brett Kendall (Temperzone Limited) giving his acceptance speech.



Craig Sain, General Manager Sales, Marketing & Logistics (POAL) (right) presents Brett Kendall with his award.



Super Shipping Shootout



The Ports of Auckland Charity Golf Tournament, held on Thursday 24 November, was a great success thanks to an excellent response from customers and suppliers.

On an early summer's day rain gave way to sunshine at the 2nd annual POAL Charity Golf day at the well groomed Remuera course in the heart of Auckland city. In a hotly contested tournament, players from over 32 companies enjoyed a great day on – and off – the fairways and the greens.

POAL launched its Charity Golf day in 2008 to raise money for its adopted charity, Cure Kids – the face of the child health research foundation that carries out research into life-threatening child illnesses in New Zealand.

“There has been an overwhelming response from POAL customers, suppliers and business associates for our chosen charity Cure Kids. It’s a highly worthwhile cause that we are delighted to be able to support” said POAL CEO, Tony Gibson.

“With entry fees, on-course donations and auction proceeds we raised a fantastic \$35,076 for CureKids. This is a great outcome and something that was appropriately celebrated at the 19th hole!”

Cure Kids CEO Vicki Lee thanked Ports of Auckland for hosting their fundraising golf day saying, “It means so much to the families whose child lives with a life-threatening illness that people are willing to do so much for them. We at Cure Kids live by the motto that you must have fun raising funds. Money Ports of Auckland has raised will go to research illnesses such as cystic fibrosis, asthma, diabetes, heart disease, leukaemia and many other genetic conditions that together affect approximately one child in every 30, potentially one in every classroom.”

Event organiser Richard Potton, POAL Manager Sales, Marketing & Product Development thanked all those who donated prizes and goods for auctions, all those who attended and contributed generously to auctions and fund-raising activities and all the support crew who helped make the day the success it was. “This annual charity golf day has become a popular fixture in POAL customers’ diaries. The date for the 2012 event will be released early to enable customers and guests to set aside the day and we look forward to seeing everyone again next year”.



POAL CEO Tony Gibson Presents Cure Kids representative Rosemary Such with a check for \$35,076.



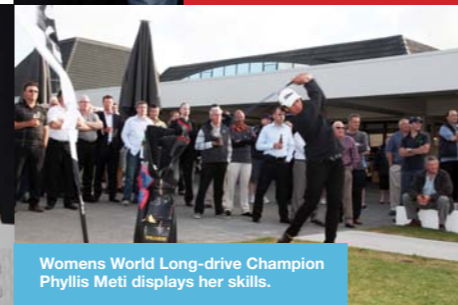
Winning team NZL Group. Left to right: Darin Hills, Rob Pompey, Matthew Foster and Jon Reid with Tony Gibson.



Winner of the Fisher & Paykel Fridge Russell Watson (Right).



Individual Non-Handicap winner: Stuart Jennings (Maersk) with Tony Gibson.



Womens World Long-drive Champion Phyllis Meti displays her skills.

Congratulations to the following:
Winning Team Stableford Trophy: NZL Group
Winning Individual Stableford Handicap: Jon Reid (NZL Group)
Winning Individual Stableford Non-Handicap: Stuart Jennings (Maersk)
In addition, to the following who won these challenge holes and prizes:
Fisher & Paykel Fridge: Russell Watson
Hole-in-one Jaguar (For one weekend) – closest player: Jon Reid
Longest Drive – Wine package: Ryan O’Sullivan
Closest to the pin – Golf Bag: Stephen Priestley



Cure Kids ambassador Greer Haddock and her father Steve presenting on the night.

The depth of debate currently taking place in the New Zealand ports and shipping world is revealed in the original 51 submissions made to and published by the NZ Government's Productivity Commission's Enquiry into International Freight Transport Services.



Operating Hours and Net Loading/Unloading Rate per Hour for Bulk Commodities (logs, woodchips, oil, coal, etc.). Domestic NZ shipping company, Pacifica's interest is in gross hours at the berth, divided by the number of moves, to get a true picture of efficiency and productivity under the crane. The Shippers' Council would prefer the Australian Waterline measure to achieve is an apples to apples comparison.

There is spirited debate on what **changes in governance** could lead to improved ports' performance. The Shippers' Council believes local authorities should be encouraged to partially sell down their holdings, pointing to local government ownership as the reason why more rationalisation has not happened. Kotahi favours the development of a ports 'hierarchy' because it sees too many NZ container ports trying to operate the same business model.

The EMA, submits that any change in the number of ports should be driven by those who use the ports as they can identify whether there are savings and efficiencies or additional costs to be had. In this regard, Marstel (a private company with bulk liquid terminal operations in Australia and New Zealand) came up with its own definite idea on how to gain one efficiency — namely a closer relationship between the Port of Tauranga and Ports of Auckland.

One of the most contentious issues is whether there is a role for central Government in defining our ports and supply chain structure. Marstel's answer is 'yes'. It calls for a more active investment role for national or local government 'where ports demonstrate indirect benefits to the region by the provision of port infrastructure beyond the return the ports are able to generate for their own activities'. The Shippers' Council believes Government should keep out of port investment. But Lyttelton Port Company is more pointed in its comment: 'To date the Government has abdicated its responsibility for planning an integrated transport whole. If parochial interests are put aside there will be benefits'.

An interim report will be published in January after which further submissions will be accepted until February..A final report will go to Government in April 2012.

The submissions are listed at www.productivity.govt.nz.

insufficient cargo volumes to be fully outsourced to multiple terminal operations competing for cargo at the same port. Lyttelton Port Company notes that with NZ's small scale, multiple terminal operations are not economic and a lot of private monopolies would push up prices for pilotage, towage services, lines, container stevedoring etc.

Ports' **charging regimes** come in for scrutiny from the NZ Shipping Federation which suggests there is a significant degree of cross-subsidisation: 'every ship that docks is required to pay substantial wharfage charges but trucks and trains pay no such charges although they too use port facilities. We see no justification for the situation where one part of the sector subsidises another'.

The measurement of **productivity within NZ ports** is patchy at best and open to improvement. On this front Kotahi favours looking at separate segments, such as Berth Occupancy, Average Waiting Time for Berthing,



Responses to questions in the PORTS section vary widely. On the degree to which ports compete, export consortium Kotahi, finds 'an element of competition between some ports that is explicitly evidenced by initiatives such as Tauranga's Metroport operation in Auckland and Lyttelton's 'South Canterbury Rail Service' capturing cargo from Timaru and Temuka'. The NZ Shippers' Council is more critical: 'Despite some competition between ports (and perhaps some price cuts) there does not appear to have been a pay-off in terms of improved productivity.' It finds most NZ ports have low productivity compared to overseas ports with some notable exceptions'. (*This conflicts with the November released NZ Ministry of Transport Report which found that container productivity at NZ ports compared favourably with international counterparts.*) With the high level of Public Authority ownership of NZ Ports, the forwarding group (CBAFF) is more damning still: 'Port ownership in general ... is inefficient and makes no difference to cost or

productivity increases'. The Port of Tauranga however comes to the defence of the port sector: 'We consider there is considerable competition ... with New Zealand having an unusually high port density relative to our population'.

Another topic that attracts a lot of attention is **competition within ports**, in the sense of stevedoring and other services. The Shippers' Council for example takes the view that 'an individual shipping company ... should be able to choose which stevedoring company services its ship'. Export New Zealand is definite in its views: 'Terminals should be able to be privately owned and operated and there should ideally be two of them competing at each port Both Pacifica and the Employers & Manufacturers Association (EMA), see a good case for the port operator to take the stance of landlord only, while CBAFF suggests selling port stevedoring operations or terminals to commercial operators such as DP World and APM Terminals. Others submit that NZ ports have

By Dave MacIntyre

Government Enquiry Excites Debate

News & Views on New Zealand Shipping Trades



Recent shipping and related appointments include **Tony Mildon** as Director of Sales for Maersk NZ replacing **Campbell Smith** who is transferring to Turkey as Sales Director for Maersk's Black Sea operations. **Tony Mildon** has worked in container shipping for nearly 20 years most recently as General Manager of External Sales for Maersk NZ.

Replacing the high profile **Catherine Taylor** as Maritime NZ (MNZ) Chief Executive and Director, is **Keith Manch** who has over 20 years public service experience.

MNZ has also announced the appointment of **John Oldroyd** as Programme Manager of MNZ's Maritime Operator Safety System team (MOSS).

Andreas Barthel, one of the two sides of the dual management structure at Hamburg Sud NZ, has returned to Hamburg to

become Group-wide Compliance Officer for Hamburg Sud. As General Manager Finance, Logistics and Operations, he shared Hamburg Sud NZ management responsibility with **Simon Edwards** General Manager Commercial who now takes sole responsibility as General Manager Hamburg Sud NZ.

At Wallenius Wilhelmsen Logistics, New Zealander **Robert Lord** becomes Regional Director for Oceania based in Sydney where he succeeds **Greg Martin** who is retiring. **Robert Lord** has worked closely to WWL within several of its major customer segments including the mining, wood and paper industries.

After a 40 year career in the ports and shipping industry, **Greg Martin** – who since 2007 has guided WWL in Oceania – retires in March 2012.



Tony Mildon

Ports of Auckland has appointed David Payne as Senior Pilot with responsibility for ensuring the efficient and safe arrival and departure of ships at POAL's Auckland and Onehunga seaports. David Payne has worked for POAL for 10 years and holds a Master Class 1 Marine Pilot License.

Long-standing POAL customer Malaysian International Shipping Company (MISC), announced late November that it would cease its loss making container shipping business with its 16 container ships. In its submission to the Malaysian Stock Exchange, MISC said factors affecting the decision included the increasing 'high operating costs for global liner shipping and rapid changes in global trade patterns'. Following this re-evaluation of its business strategy, MISC will continue to operate oil, LNG and chemical tankers.



Maersk NZ says the shipping line's new Daily Maersk on time delivery guarantee, will not operate in the NZ market. Maersk Line NZ Trade & Marketing Manager Dave Gulik says local conditions and cargo volume means that the Daily Maersk 'conveyor belt won't stretch' to NZ but, 'the thinking behind it certainly will'. Daily Maersk is the Line's response to the 'serious challenge of reliability that the shipping industry generally faces'. Maersk says 'it's a statistical fact that almost one of every two containers does not reach destination on time'. The Maersk approach is to offer shippers transporting goods (initially) between four ports in Asia and three in Europe, a daily cut-off time for container delivery with a guaranteed date for cargo availability at destination port. That commitment is backed with cash compensation. Maersk says that by providing customers with greater certainty around total transportation times (rather than transit times), Daily Maersk reduces the need for them to carry buffer stocks, thereby streamlining their operation and reducing inventory stocks.

directory

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