

A large red and white RORO Express ship is docked at a port. The ship has "RORO EXPRESS" written on its side in black and red letters. The background shows a blue sky with some clouds and a body of water.

***What can we learn from the
Ro-Ro / freight industry?***

Jon Boyce 17th April 2007

Ro-Ro traffic 2006



- European Ro-Ro traffic
 - average growth 4%
- Highest growth on routes to
 - Russia
 - Baltic States
 - Poland
 - Italy
 - Spain

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Ro-Ro traffic 2006



- Majority of the growth in ***driver accompanied*** vehicles.
- Low growth in Inter-European ***unaccompanied*** trailer traffic
- Percentage of high-cube inter-modal 13.6m/48ft-containers is growing

Implications for the industry



- Pool of Eastern European drivers
- Wages will start to even out – but not soon
- The EU's working time directive is effective – but *only* where the law is enforced
- Road pricing will become widespread but marginally affect the Ro-Ro industry
- CO₂ emissions will be a major issue
- Short routes will still be preferred
- Overnight services of < 8 hrs will be favoured
- New and longer vehicle types will appear - offering €/km cost reductions of 20-25%

More efficient and longer trucks



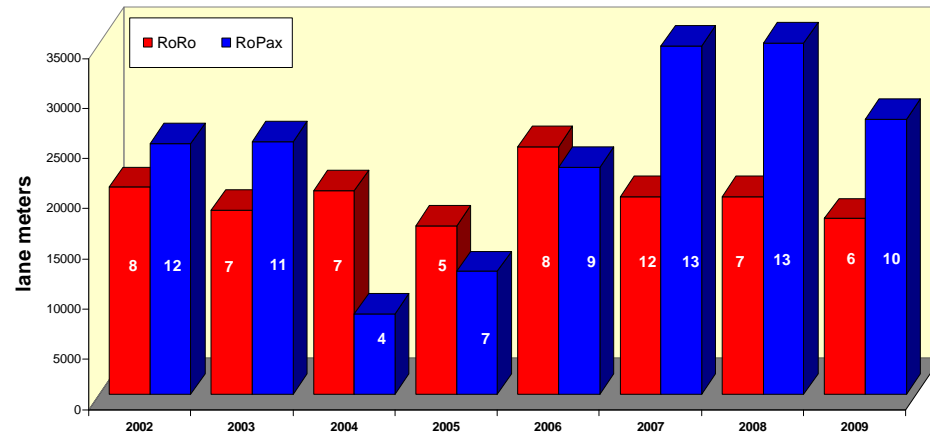
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Implications for the industry



- Ro-Pax vessels will continue to be in great demand in the short and medium term future.
- New, efficient, Ro-Ro vessels are urgently required to replace an ageing fleet.

RoPax taking over?



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CO₂ Emissions - A Hot Topic



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Is our industry really environmentally friendly?



An average tractor-trailer: 0.945 kg CO₂/km

23 kt 3831 l.m "Flower class" Ro-Ro: 0.96 kg CO₂/trailer/km

19 kt 2604 l.m Cobelfret Ro-Ro: 0.768 CO₂/trailer/km

28 knot 2000 l.m Ro-Pax: 3.61 CO₂/trailer/km

22 knot 5500 l.m Ro-Pax: 1.12 CO₂/trailer/km

Truck NOx emissions have been reduced:

1990: 44g/l

2009: 7g/l (Euro 5 engines)

Is our industry really environmentally friendly?



Maurizio Longo, director of the small and medium sized Italian trucking association CNA Fita :

“The trucking industry should not be made to carry a disproportionate share of the burden, while shipping's contribution to atmospheric pollution goes unexamined....”

He is pressing the Italian government for a reassessment of the Ecobonus scheme, designed to spur the transfer of trucks from road to sea.

“....because the Ecobonus system is based on routes rather than ships, it fails to distinguish between ship-owners who have invested in ecologically cleaner ships and those running less advanced vessels....”

SOLAS 2009 -What will be the effects on the cost of Ro-Ro and Ro-Pax ships?



- Extra steelweight
- Loss in lane meters
- Shipyards are unfamiliar with the new rules (excluding a few specialized yards)

SOLAS 2009



Higher costs:

- 1200 I.m Ro-Ro +10%
- 1800 I.m Ro-Ro +7%
- 2400 I.m Ro-Ro +4%

The only ***HARDER*** Ro-Ro example



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What will the "ship of the future" look like?



- Vessel size will grow, 240m length will be common
- Speed will be reduced to cut CO₂ emissions
- Drivers demand single cabins
- Separate restaurant, lounge and relaxation facilities

5500 lane meters - the way to go?



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15

Are ports prepared?



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Thank you for your attention!

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