

TOC Europe, Rotterdam, 17-19 June 2025



DATA SOURCES

Survey data



Digitalization



Climate and Energy



Infrastructure



Market outlook



Community building



Health, Safety and Security



Environmental care



Strategic decisions

External data

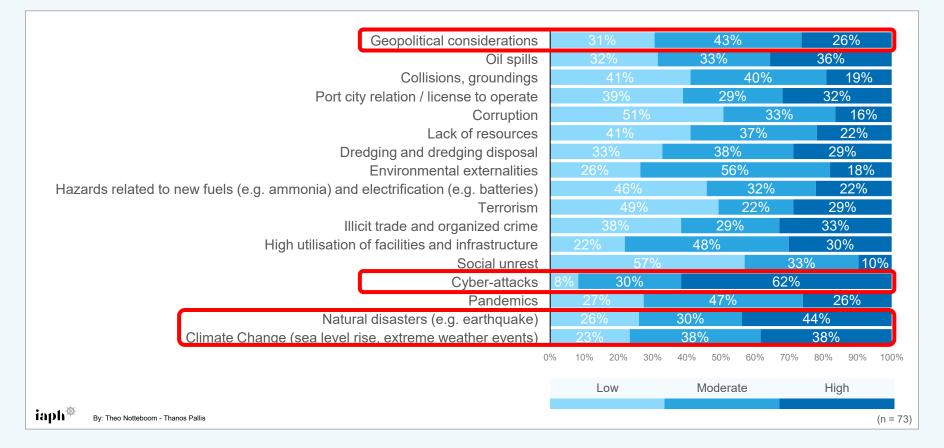
- S&P Global port data
- UNCTAD / MDS Transmodal LSCI data



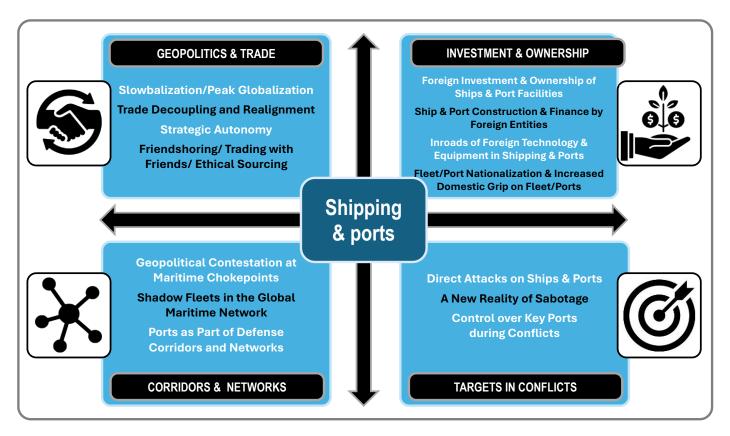
Health, Safety and Security



Evaluation of risk factors for the port area







Source: adapted from Notteboom & Haralambides (2025)



Health, Safety and Security



Status of initiatives in the area of health, safety and security

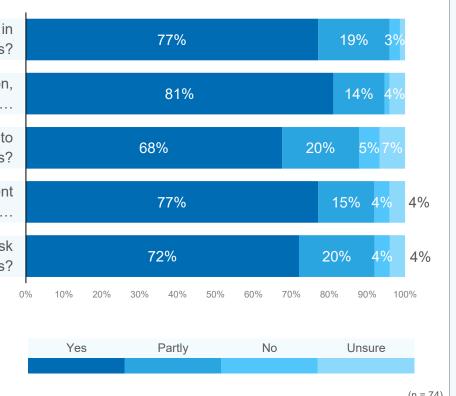
Do you regularly undertake emergency drills and exercises in your port involving all relevant stakeholders?

Has the port authority established procedures for coordination, collaboration, and resource sharing with relevant parties...

Has the port authority implemented a business continuity plan to cope with potential disruptions associated with its priority risks?

Has the port authority developed an emergency management response and coordination framework to address its priority...

Has your port undertaken a threat / hazard identification and risk assessment to identify its main risk factors?



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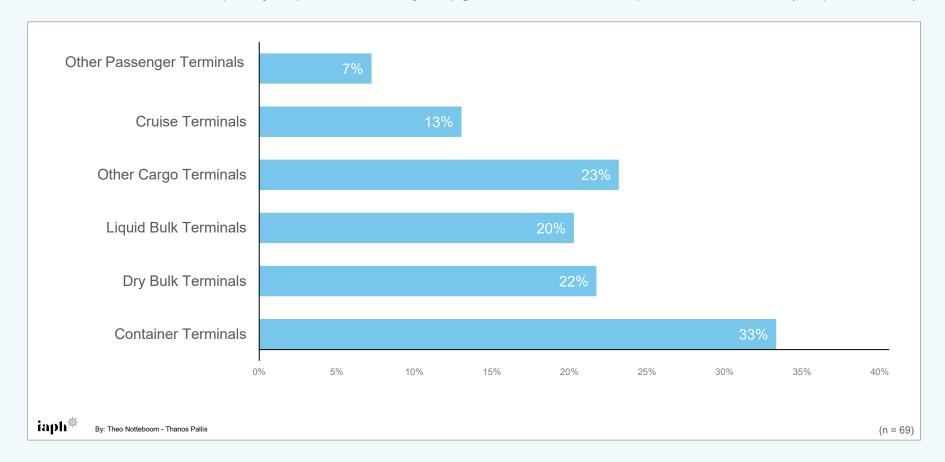
(n = 74)



Infrastructure + Strategic decisions



Ports where terminal capacity expansion or major upgrades will become operational in 2025 (%, per market)

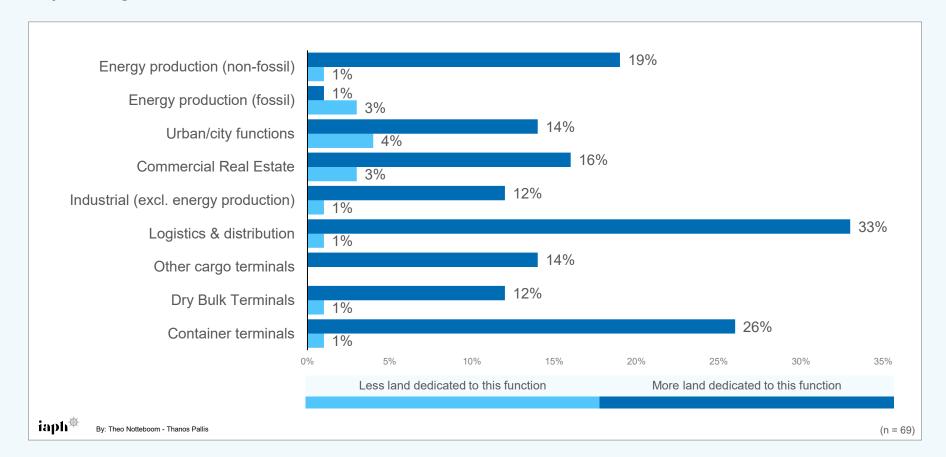




Infrastructure + Strategic decisions



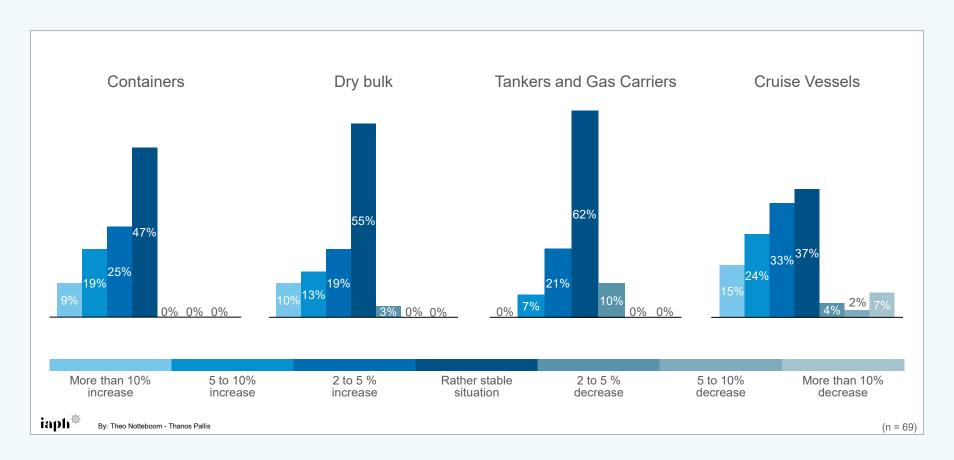
Major changes in Land Use 2025



Market Outlook – Survey data



In the next 12 months, do you expect the cargo throughput (pax) at your port to increase or decline?

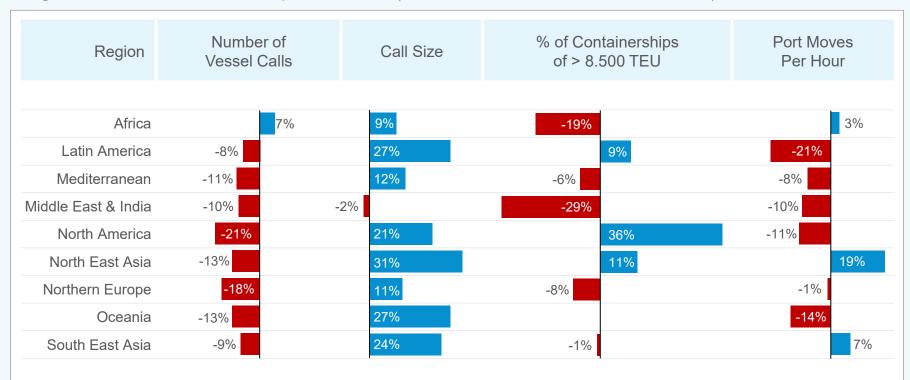




Trends in Container Ports



Long-term evolution of container port activities (Indexed based / Q4 2024 vs Q4 2019)



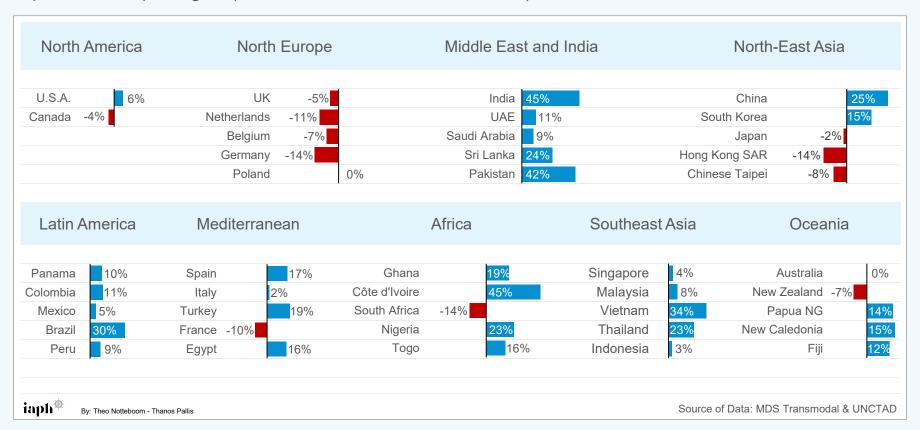




Trends in Container Ports - Liner Shipping Connectivity



Evolution of Liner Shipping Connectivity since 2019 Top 5 locations per region (index-based / Q4 2024 vs Q1 2019)



- Short-term impact: trade volumes shift lanes.
- Long-term impact: rewriting the map of maritime commerce?
- Open question: Will the trade flows moving through a port primarily reflect market strength, or increasingly represent the balance of political power?



