Terminals – Elements for growth in place
## Port container terminals

<table>
<thead>
<tr>
<th>Terminal size (TEU)¹</th>
<th>Total no. of terminals</th>
<th>% of total terminals</th>
<th>No. of terminals which are state owned²</th>
<th>State-owned % of total terminals</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt; 100K TEU</td>
<td>594</td>
<td>47.6%</td>
<td>307</td>
<td>51.7%</td>
</tr>
<tr>
<td>100K &lt; 250K TEU</td>
<td>256</td>
<td>20.5%</td>
<td>62</td>
<td>24.2%</td>
</tr>
<tr>
<td>250K &lt; 500K TEU</td>
<td>160</td>
<td>12.8%</td>
<td>34</td>
<td>21.3%</td>
</tr>
<tr>
<td>500K &lt; 1 million TEU</td>
<td>126</td>
<td>10.1%</td>
<td>23</td>
<td>18.3%</td>
</tr>
<tr>
<td>&gt; 1 million TEU</td>
<td>112</td>
<td>9.0%</td>
<td>20</td>
<td>17.9%</td>
</tr>
<tr>
<td>Total</td>
<td>1,248</td>
<td>100.0%</td>
<td>446</td>
<td>35.7%</td>
</tr>
</tbody>
</table>

Notes: (1) Terminal size is based on 2009 throughput
(2) Excludes terminals owned or managed by state owned global operators such as PSA and DP World but includes terminals where the government has majority ownership

Source: Drewry Maritime Research (2011)

Source: Drewry 2011; Bain analysis
Rethinking the market

Customer performance
- Cost per move
- In-depth knowledge of customers' business, operational excellence

Fleet performance
- Cost per hour
- Life-cycle cost, maintenance excellence

Product fit
- Cost per item
- Product-application knowledge
The new Terminals business area

• **Our customers**
  Sea and river ports, container depots, intermodal terminals and other diverse customers

• **Our mission**
  is to improve the efficiency of cargo flows

• **Our strategy**
  is to help our customers’ business run better
The most comprehensive offerings in the industry

**Equipment**
Complete set of equipment for terminal processes

**Systems & Automation**
Terminal operating systems
Automated equipment
Automated terminals

**Services**
Global service network
Rebuilding and refurbishing
Service contracting
Terminal development

Packaging & integration & operationalisation
Industrial & Terminal sales and operating margin
- growth and margin improvement potential for Terminals

EBIT% Q1/08–Q4/10 excluding restructuring costs

MEUR
Customer focus

Customer driven way of thinking

Research, Technology and Engineering
Product Areas
Projects and Offerings
Global Sales and Service
Navis acquisition boosts terminal development innovation

• Adding Navis to portfolio enables us to offer complete solutions for terminal customers and enlarge the accessible market
Establishing competence centres in Singapore and Tampere bring more customer focus on R&D

**Singapore Competence Centre**  
Focus on customers and terminal processes

**Tampere Technology and Competence Centre**  
Focus on technology
Repositioning in the heavy cranes market

• With the planned joint venture with Rainbow Heavy Industries our target is to achieve a leading position in heavy cranes

• The aim is to
  • Further strengthening our presence in China
  • Create growth globally
  • Improve production capacity and cost efficiency
Winning with products

Bolivariana de Puertos, S.A., Venezuela

Indonesia
Winning with projects

London Gateway

TraPac Inc, Los Angeles, USA
Winning with services

GMP Le Havre, France

Northport (Malaysia) Bhd
Focus areas for Terminals

• Offering development, including equipment, systems & automation and services
• Project sales and delivery capabilities
• Sales management capabilities
• Cost efficiency
Box thinking

Pure and simple box thinking – how to move containers evermore effectively!
we keep cargo on the move™