



# Your five star route to Europe

Transportevents, 12th Intermodal Africa, 23 and 24 October 2014, Durban

**North Adriatic ports serving the African Market – trends and prospects**

Presented by Mitja Dujc, Sales Manager at Luka Koper - Port of Koper



# Four ports - one port



**NAPA**  
North Adriatic Ports Association

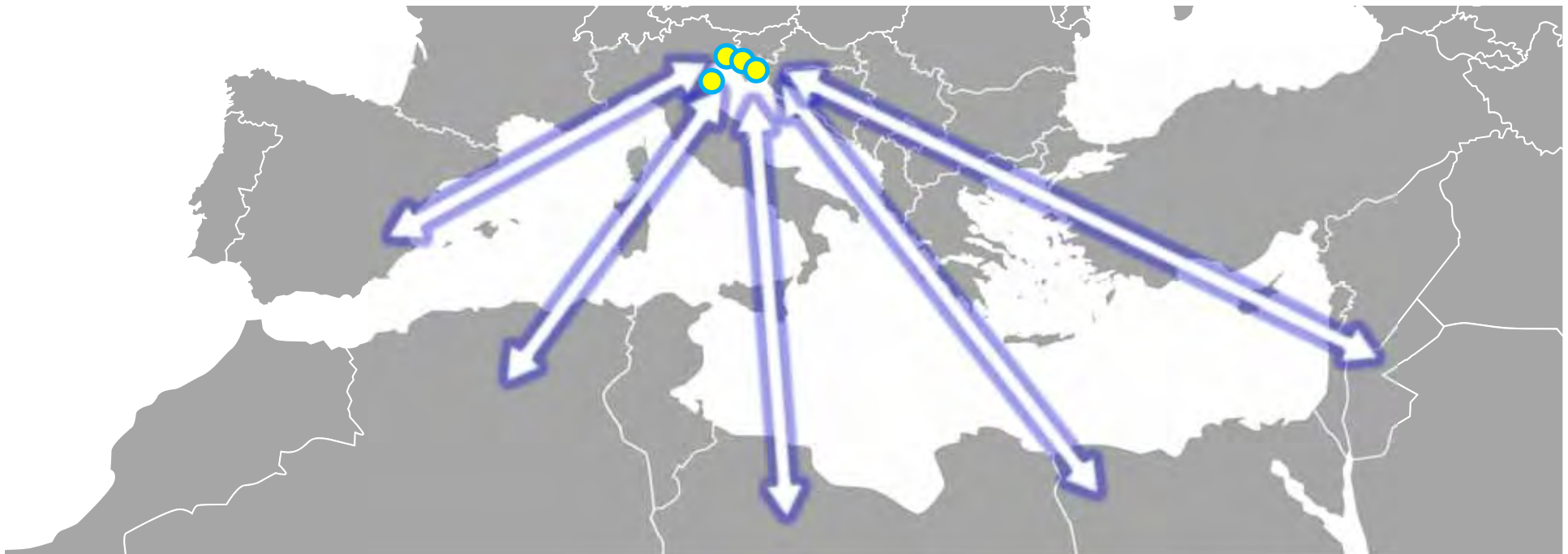


## Developed maritime connections with the Mediterranean and beyond



**NAPA**  
North Adriatic Ports Association

- Regular maritime connections with container, conventional and Ro-Ro services
- Feeder connections with major container hub ports
- Short sea shipping - Motorways of the Sea

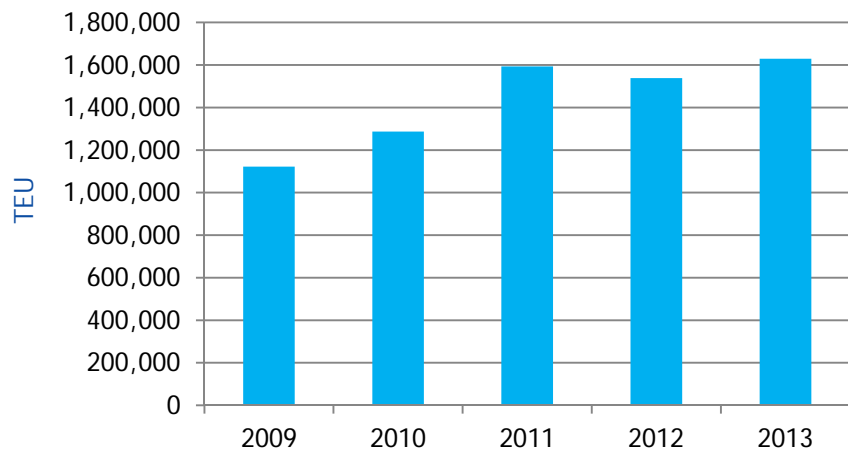


# European benchmark

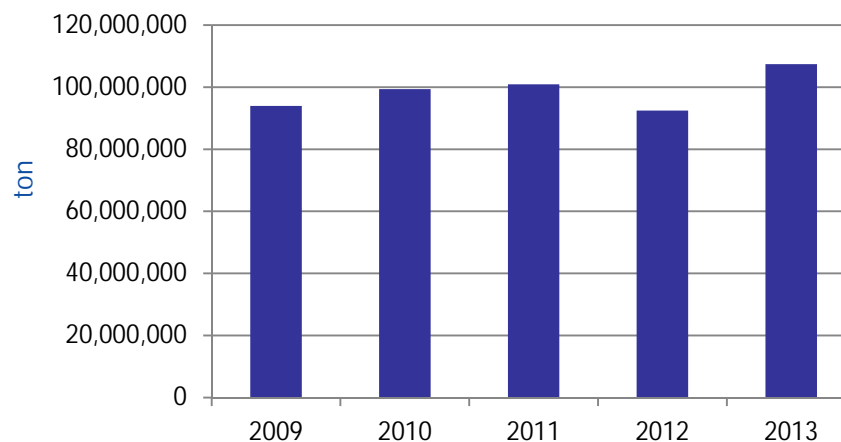


	Total throughput in million tonnes (2013)	Container throughput in million TEU (2013)
Rotterdam	440.0	11.6
Antwerp	190.9	8.6
Hamburg	139.0	9.3
<b>NAPA ports</b>	<b>108.0</b>	<b>1.6</b>
Marseille	80.0	1.1
Bremen	78.8	5.8
Zeebrugge	43.0	1.9

Container throughput of NAPA ports in TEU



Total throughput of NAPA ports in tonnes

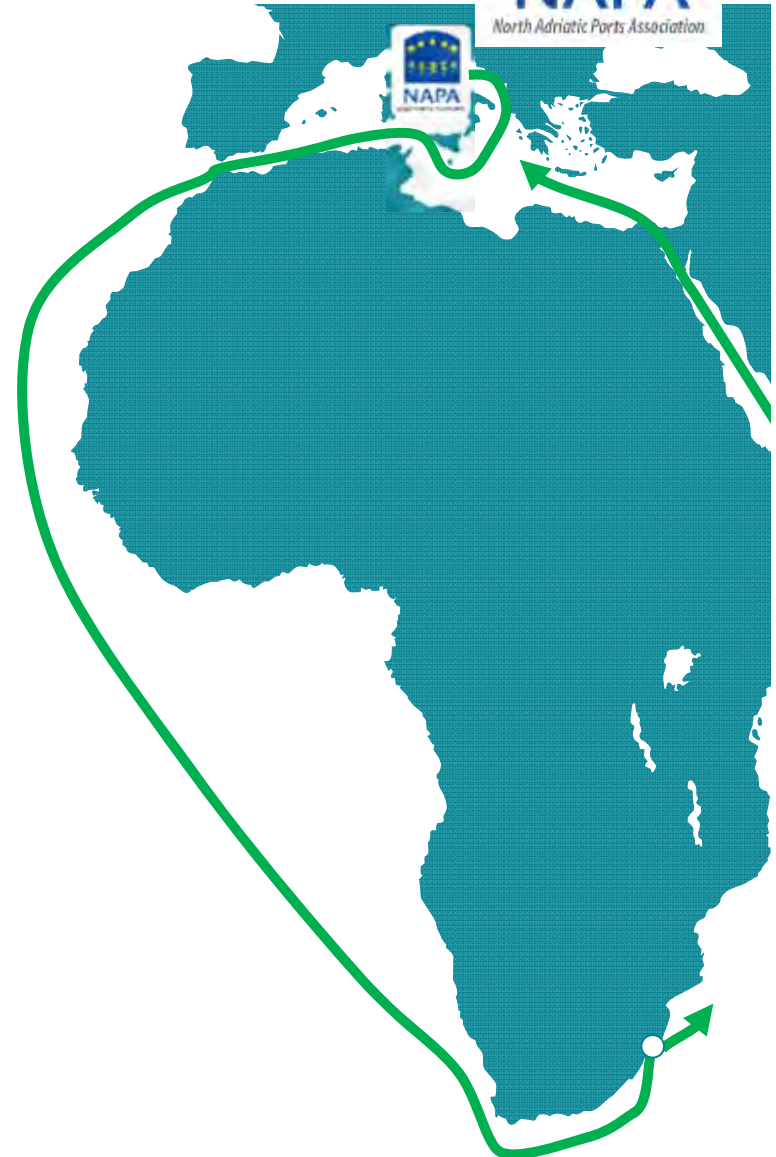


# Container services RSA - Adriatic



- Regular container services via transshipment ports in Mediterranean and Asia

Operator	Transshipment port	Approx. transit time
Hapag-Lloyd	Port Said Damietta/Singapore	45 days
MSC	Gioia Tauro Las Palmas	35 - 40 days
Maersk/Safmarine	Algeciras	35 - 39 days





## Overview of connections and infrastructural investments



- Port of Venice
- Port of Trieste
- Port of Koper
- Port of Rijeka

# Port of Venice



AUTORITÀ PORTUALE  
DI VENEZIA

# Port of Venice - Intramed Destinations

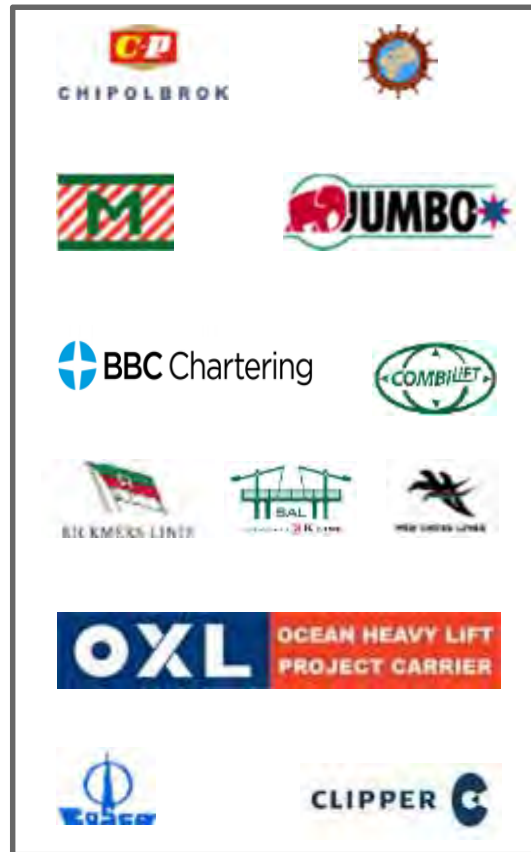
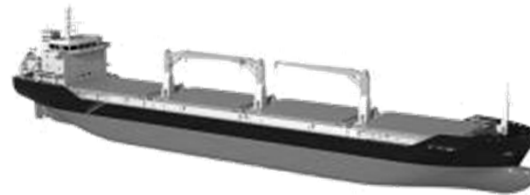


TO: GREECE, TURKEY, LYBIA, EGYPT, ISRAEL, LEBANON





# Port of Venice - Liner Services



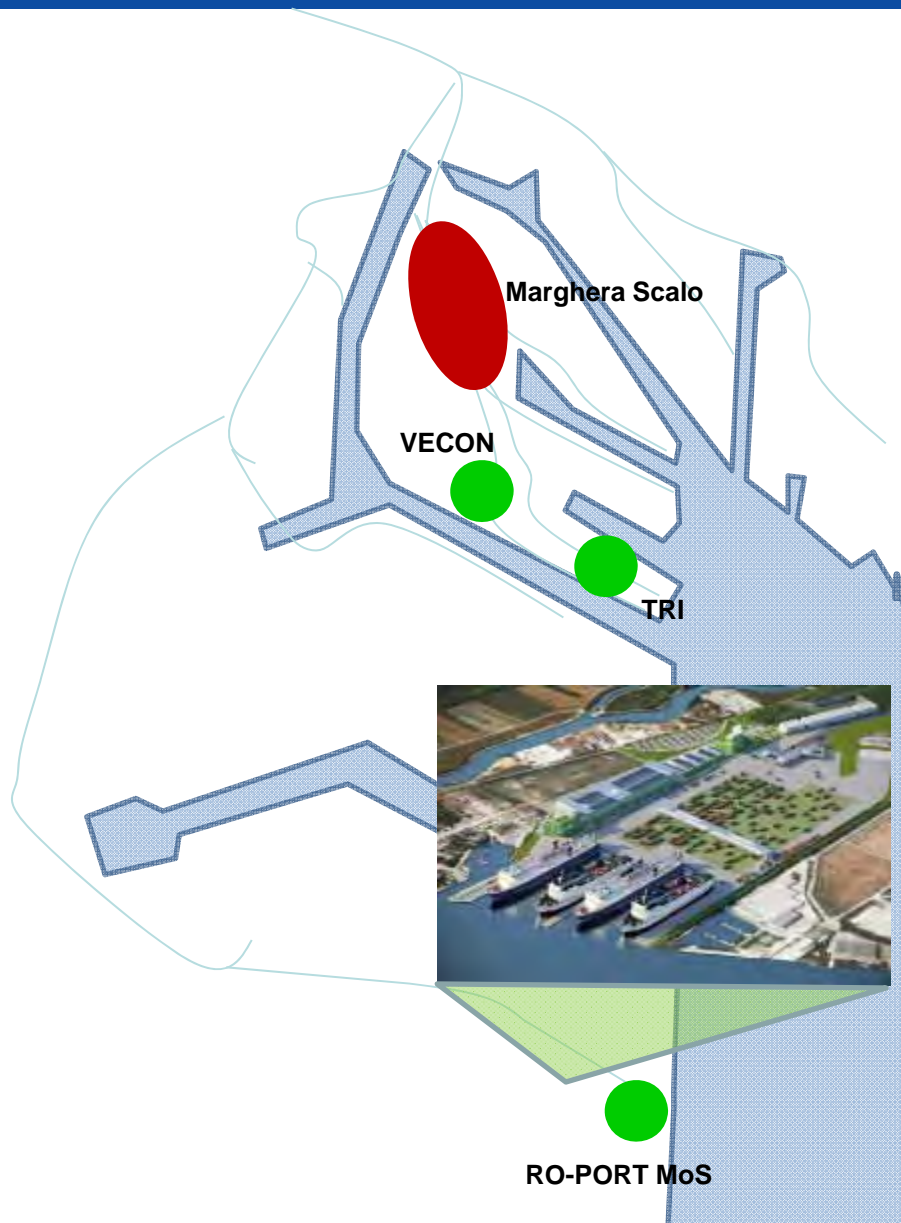
SCHEDULES  
AND PORTS OF CALL ON:  
[www.port.venice.it/it/sailing-list.html](http://www.port.venice.it/it/sailing-list.html)

Container

Break-bulk

Ro-Ro/Ro-Pax

# Port of Venice - Ro-Ro and Ro-Pax facilities



## CURRENT FACILITIES

### TRI - Terminal Rinfuse Italia

MAXIMUM DRAFT : up to 11.30 mt

1 BERTH WITH RO-RO RAMP

INSIDE RAYLWAY NET

BULK SILO : 100.000 tonn capacity

TERMINAL SURFACE: 277.500 m<sup>2</sup>;

STORAGE AREA : 230.000 m<sup>2</sup>

WAREHOUSES: 52.724 m<sup>2</sup>

### VECON

MAXIMUM DRAFT: up to 11,50 mt

1 BERTH WITH RO-RO RAMP

INSIDE RAYLWAY NET

TERMINAL SURFACE: 283.800 m<sup>2</sup>

STACKING YARD: 283.000 m<sup>2</sup>

## NEW FACILITIES: RO-PORT MoS

Ro Port Mos terminal will be operational in June 2014.

It will be equipped with:

- 2 docks with 4 piers able to host 4 vessels in parallel;
- a logistic platform with controlled temperature warehouses (100.000 mq);
- open and parking area (40.000 mq);
- 2 track directly linked with Marghera Scalo
- 36 hectares of total surface

# Port of Venice - Services for the Mediterranean



## STORING AND HANDLING FRUIT AND VEGETABLES

Inside the commercial port  
25,146 m2 area  
200,000 m3 warehouses  
Temperature-controlled facilities



## A NEW FREE ZONE

The existing free zone is being relocated to a more convenient location



## A NEW ONE-STOP SHOP: THE PORT HEALTH CENTER

Border Veterinary  
Phytopatology office  
Health Office



## PRE-CLEARING AND SINGLE WINDOW



At the Port of Venice customers can profit from quicker customs procedures such as

- ✓ Pre-Clearing
- ✓ Single Window

# Port of Trieste

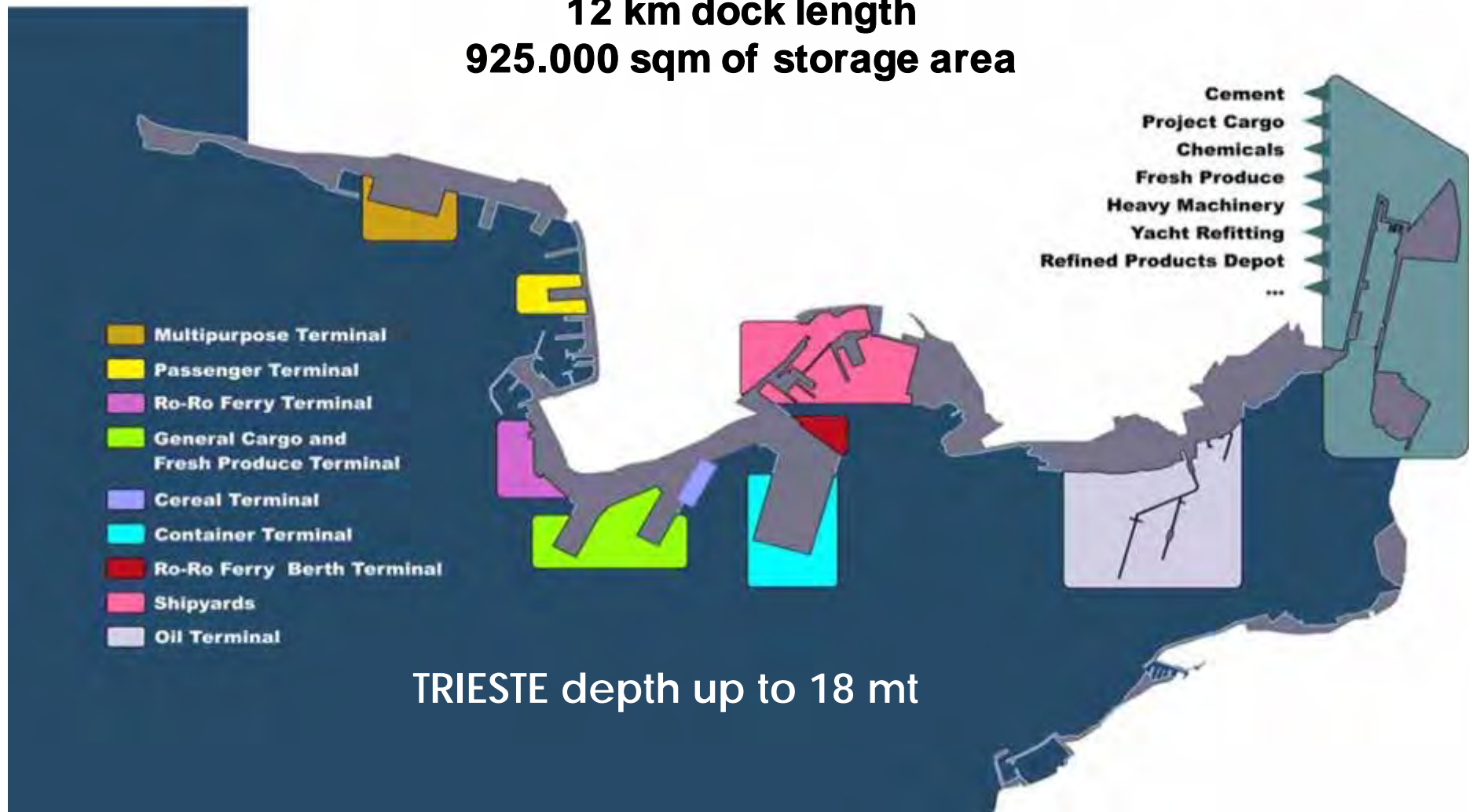




# PORT AUTHORITY OF TRIESTE: PORT AND INFRASTRUCTURES



**2,3 million sqm**  
**1,8 million sqm free port area**  
**12 km dock length**  
**925.000 sqm of storage area**



**TRIESTE depth up to 18 mt**



# PORT AUTHORITY OF TRIESTE: MARITIME TRAFFIC



	2013	2012	Variation % 2013 / 2012
<b>CONTAINER MOVEMENT TEUs (shifting &amp; restous included)</b>	<b>458.597</b>	<b>408.023</b>	<b>+12,39%</b>
<b>CRUDE OIL (tons)</b>	<b>41.284.644</b>	<b>35.014.883</b>	<b>+17,90%</b>
<b>PASSENGERS MOVEMENT (units)</b>	<b>147.414</b>	<b>98.647</b>	<b>+49,43%</b>
<b>TRUCKS ON RO-RO / FERRY BOATS (units)</b>	<b>271.519</b>	<b>212.633</b>	<b>+27,69%</b>

<b>VESSEL MOVEMENTS (calls only)</b>	<b>2.402</b>	<b>2.274</b>	<b>+5,63%</b>
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# KEY INFRASTRUCTURES AND SERVICES: THE CONTAINER TERMINAL



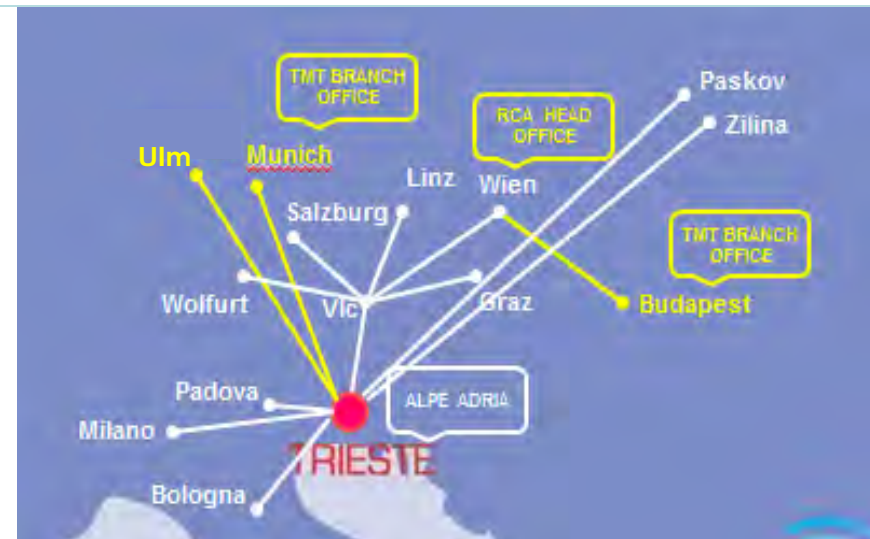
- 458.597 teus performed in 2013
- A modern infrastructure and equipment with 650-700.000 teu capacity: the biggest in the Adriatic.
- Draft: 18 meters at the berth
- New 3.000 meters rail park inside
- 362 days per year working time

**SEVERAL DIRECT MARINE CONNECTIONS WITH THE BEST T/T: MAERSK, CMA CGM, MSC, SEAGO LINE, EVERGREEN, HANJIN, YANG MING, MOL, CHINA SHIPPING, ZIM**

## THE INTERMODAL CONNECTIONS VIA TRIESTE

Over 30 trains per week operated by  
T.O.Delta, Alpe Adria, Rail Cargo  
Austria, to / from:

**MUNICH 4-5/week**    **ULM 1/week**  
**AUSTRIA 5/week** (Wien-Salz-Villach-Graz-Wolf)  
**(ZILINA 1/week)**    **(PASKOV 1/week)**  
**MILANO 2/week**    **PADOVA 5-7 week**



# KEY INFRASTRUCTURES AND SERVICES: THE FRUIT TERMINAL



- 625 m quay length
- 4 berths
- 51.500 m<sup>2</sup> warehouses
- Rail connected warehouses
- Special regime of free zones allows goods to maintain their foreign origin until the final importation, without paying any duty.

## COLD WAREHOUSES

- 51.500 m<sup>2</sup> warehouses
  - 18.200 m<sup>2</sup> cold warehouses
  - 30.000 m<sup>2</sup> storage in open area
  - Rail connected warehouses
  - L.M.E. and LIFFE registered warehouse
- A direct “green line” with the cntr terminal for quick deliveries





# PORT AUTHORITY OF TRIESTE: THE INVESTMENT PLAN



## Logistic Platform



### Logistic Platform – 1st phase (Euro 132.000.000)

New Terminal with a quay of 600 m and with the deep sea-bottoms (a depth of up to 14 m)

### Logistic Platform – 2nd phase (Euro 184.500.000)

Further investments with the creation of an equipped area and new docks, structures from which the future Pier VIII will develop

## New Ro Ro Trml



### Zaule Ferry Terminal – 1st phase (Euro 27.000.000)

New Terminal to be allocated for port operations, container handlings and storage of goods with the deep sea bottoms (with a depth of up to 12 m) for the docking of RO-RO vessels

## New Rail Trml



### Rail Terminal of Campo Marzio (Euro 10.000.000)

New port near the border state property, consisting of an external railway ramp composed by 4 tracks served by RMGC cranes, rationalization of the current needs of the rail transport connected to the port

# Port of Koper





# The multi-purpose Port of Koper

Containers and Ro-Ro



Break bulk



Liquid bulk



Project cargoes



Passengers



Perishables



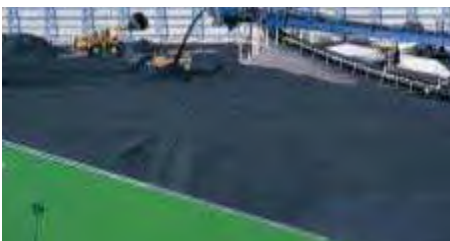
Cars



Alumina and other minerals



Coal and iron ore



Soya, grain, cereals,...



Timber



Livestock



## Port of Koper maritime connections



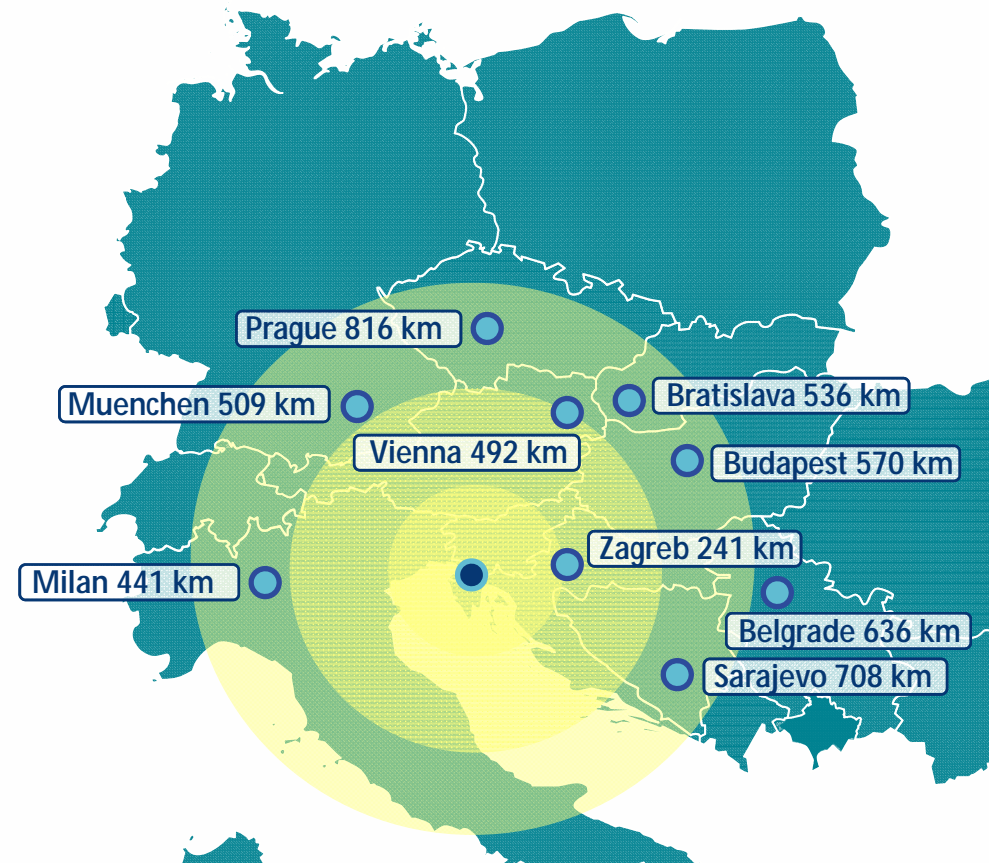
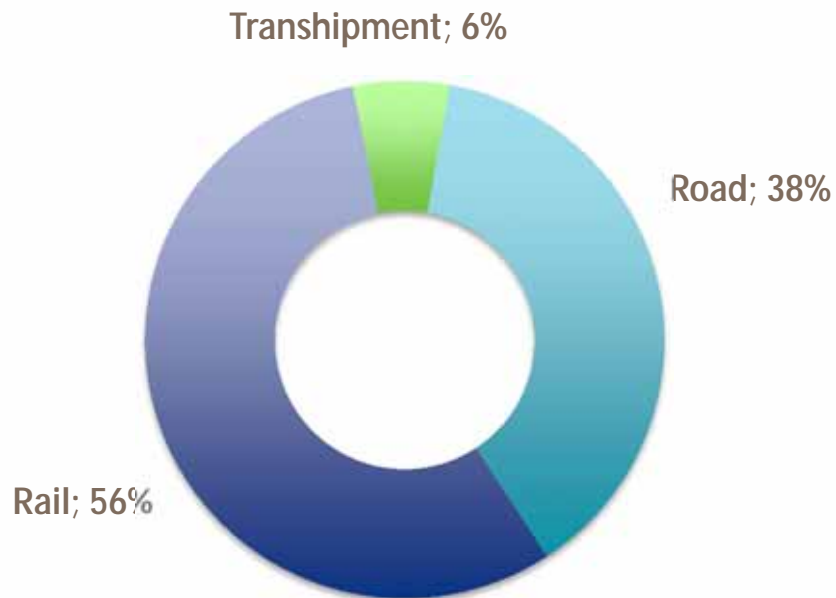
- regular container, Ro-Ro and conventional connections,
- numerous tramper, tanker and other dedicated services,
- more than 50 operators calling Koper on regular basis,
- 1907 vessels berthed in 2013.



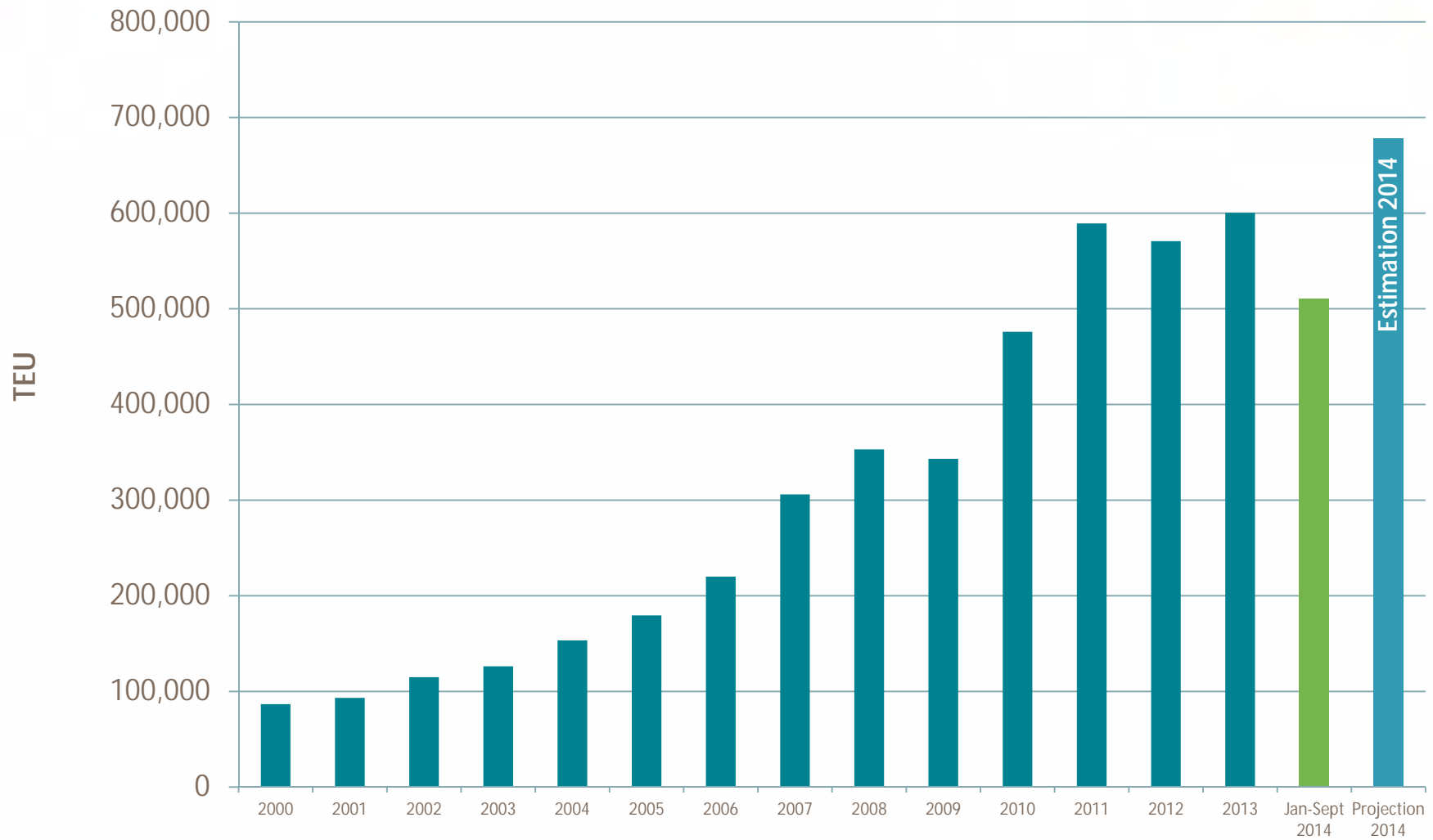
## Hinterland connections

- excellent railway connections to hinterland markets,
- modern highway network,
- business centres of surrounding hinterland markets can be reached from the Port of Koper by road in less than 1 day and by train in less than 2 days.
- an average of 52 trains / day.

### Modal split



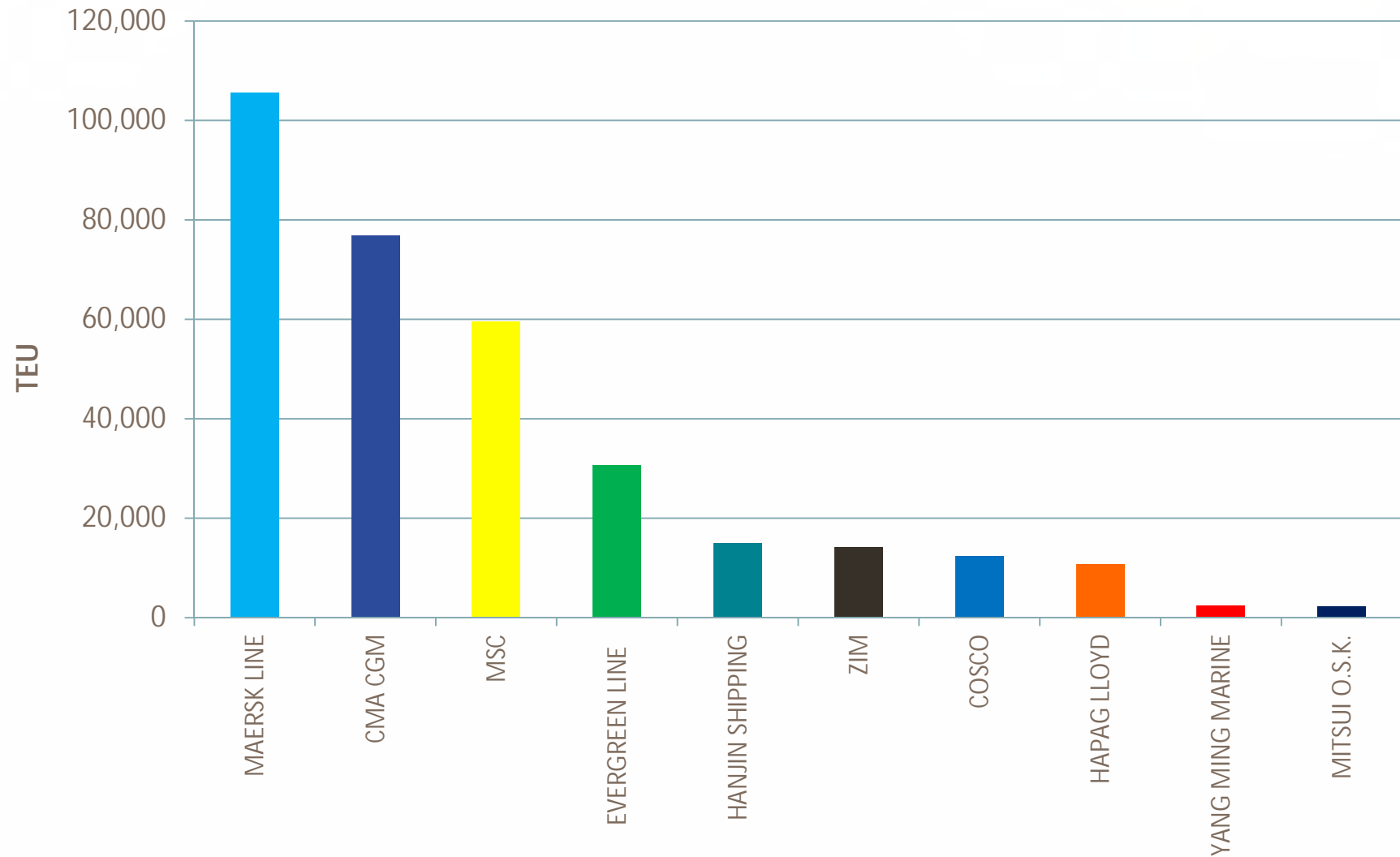
# Container traffic in Koper



**+14,5%**  
(Jan-Sept 14/13)

# Container throughput by shipping line

top 10 shipping lines in January - June 2014



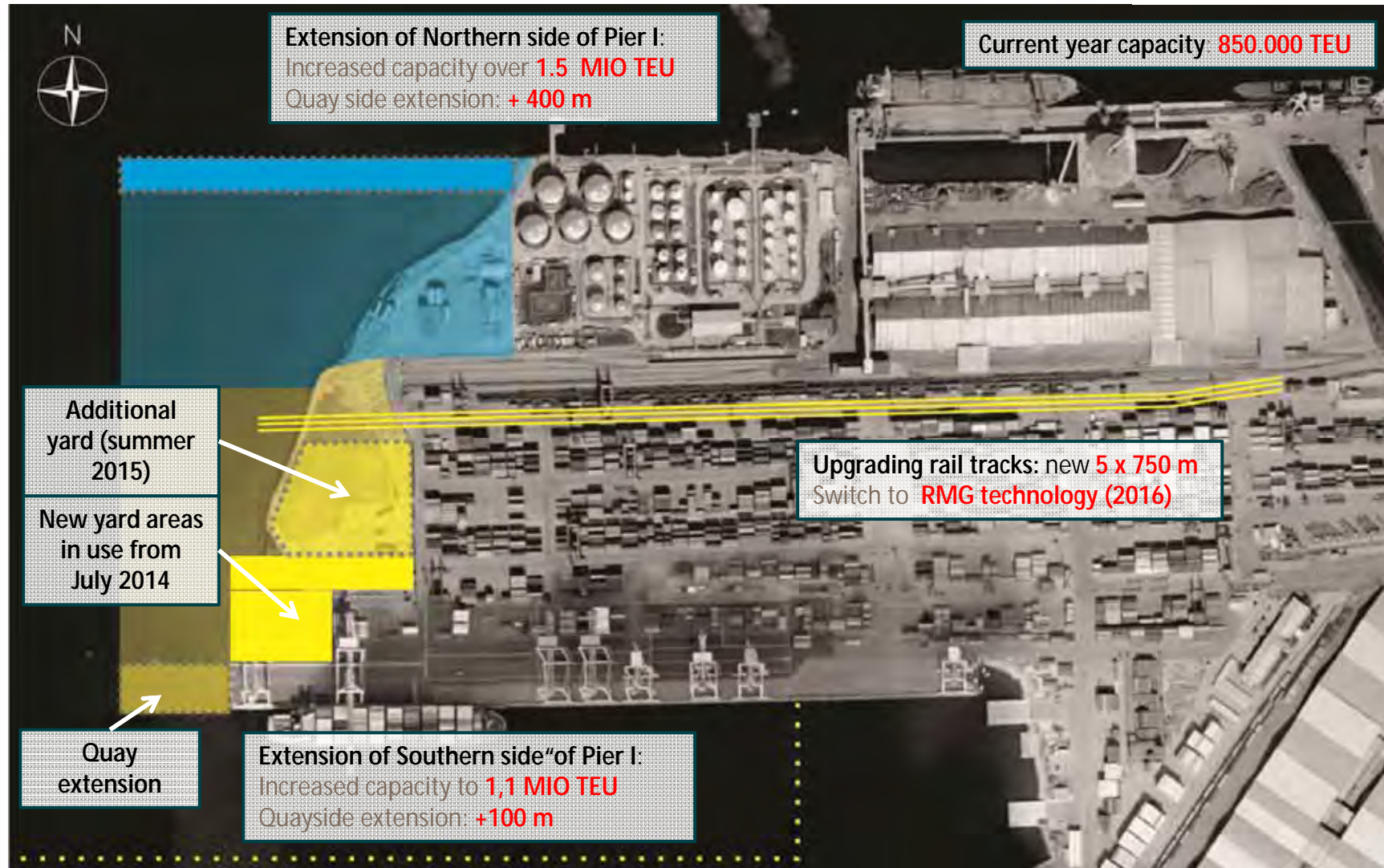


# Key development projects





# Koper Container terminal development plan



# Port of Rijeka



LUČKA UPRAVA RIJEKA  
PORT OF RIJEKA AUTHORITY

# Port of Rijeka Authority



LUČKA UPRAVA RIJEKA  
PORT OF RIJEKA AUTHORITY

## ROLE:

- ❖ PORT AREA DEVELOPMENT - 5 BASINS
- ❖ GRANTING OF CONCESSIONS FOR USE AND PERFORMANCE OF ACTIVITIES
- ❖ ADMINISTRATION WITH FREE ZONE
- ❖ CONTROL OF ENTRANCE AND DEPARTURE OF VESSELS



BAKAR

RIJEKA & SUŠAK



OMIŠALJ

RAŠA





# Terminals



LUČKA UPRAVA RIJEKA  
PORT OF RIJEKA AUTHORITY

## Bulk Cargo Terminal



- Sea depth: 18 m
- Annual capacity: 4.000.000 t
- One time storage capacity:
  - Iron ore: 400.000 t
  - Coal: 130.000 t
- Accommodation of Panamax & Capesize vessels

## General Cargo Terminal



- Sea depth: 12m
- Annual capacity: 2.000.000 t
- New shore cranes Liebherr
- Total capacity: 84 t each
- Installed: May 2013
- Possibility of various cargo handling

## Frigo Terminal



- Sea depth: 10m
- Annual capacity: 100.000 t
- Cooling facilities with chambers for
  - tropical fruit
  - Cooling facilities for frozen meat & fish

## Cereal Terminal



- Sea depth: 14 m
- Annual capacity: 1.000.000 t
- Single storage possibility for cereals: 56.000 t

## Terminal Bršica



- Multifunctional terminal
- Sea depth: 8m
- Accommodation and dispatch of live cattle
- Transhipment of timber, general and bulk cargo

## Škrljevo Inland Terminal



- Capacity
- Total area: 400.000 m<sup>2</sup>
  - Open warehouses: 130.000 m<sup>2</sup>
  - Covered warehouses: 43.000 m<sup>2</sup>
  - Free zone
  - Actual activities : container depot, various cargo storing/handling, .....

## Oil Terminal



- Sea depth: 29 m
- Annual capacity: 30.000.000 t
- One time storage capacity:
  - 21 storage tanks : 1.030.000 t
- Accommodation :
  - VLCC up to 500.000 DWT

## Container terminal



- Pier length 623 m
- Depth 14,2 m
- Ro-Ro terminal
- Free Zone
- Surface area 150.000 m<sup>2</sup>
- Annual capacity 600.000 TEU



## Investment plans



LUČKA UPRAVA RIJEKA  
PORT OF RIJEKA AUTHORITY

# RIJEKA GATEWAY PROJECT WORLD BANK NEW CONTAINER TERMINAL ON ZAGREB PIER

THE TERMINAL IS PLANNED TO BE BUILT IN TWO STAGES



### 1<sup>ST</sup> STAGE

- ❖ 400 M PIER WITH 20 M DEPTH OF THE SEA
- ❖ 14 HA STORAGE/STACKING AREA
- ❖ ENTRANCE-EXIT COMPLEX
- ❖ LOADING-UNLOADING STATION FOR RAILCARS
- ❖ RELOADING EQUIPMENT- QUAY, STORAGE/STACKING AND RAILWAY TERMINAL
- ❖ SUPPORTING ACTIVITIES (SERVICE ACTIVITIES, OFFICE PREMISES, PARKING AREAS)

### 2<sup>ND</sup> STAGE

- ❖ 280 M PIER WITH 20 M DEPTH OF THE SEA
- ❖ 4 HA STORAGE/STACKING AREA

### RAILWAY STATION FOR CONTAINER TERMINAL

- ❖ 2,5 HA

# Investment plans



LUČKA UPRAVA RIJEKA  
PORT OF RIJEKA AUTHORITY

Port of Rijeka Authority and the City of Rijeka in cooperation with the Architect Association Rijeka (DAR) published invitation to the public, international, open, single-stage, anonymous, ideas COMPETITION for the urban-architectural concept design for the development of the Delta and Porto Baros area in Rijeka.

In the prescribed time limit a total of 56 entries were submitted (24 foreign). Competition Jury made a final decision on (17th of November 2013) on awarding the three equal FIRST PRIZES to the following entries:

- ❖ Studio 3LHD Ltd., Zagreb, Croatia
- ❖ PORTICUS Ltd., Split, Croatia
- ❖ Njiric + arhitekti Ltd., Zagreb, Croatia



Vicinity to the popular sites:  
Korzo street, market and theatre



Close contact to Rijeka City

Visibility from almost every corner of the City

Great amenities

Marina, hotel, tourist services

Services, landmarks, squares

Restaurant, offices, apartments

Public spaces

Waterfront, access to the sea

Boutiques, shops

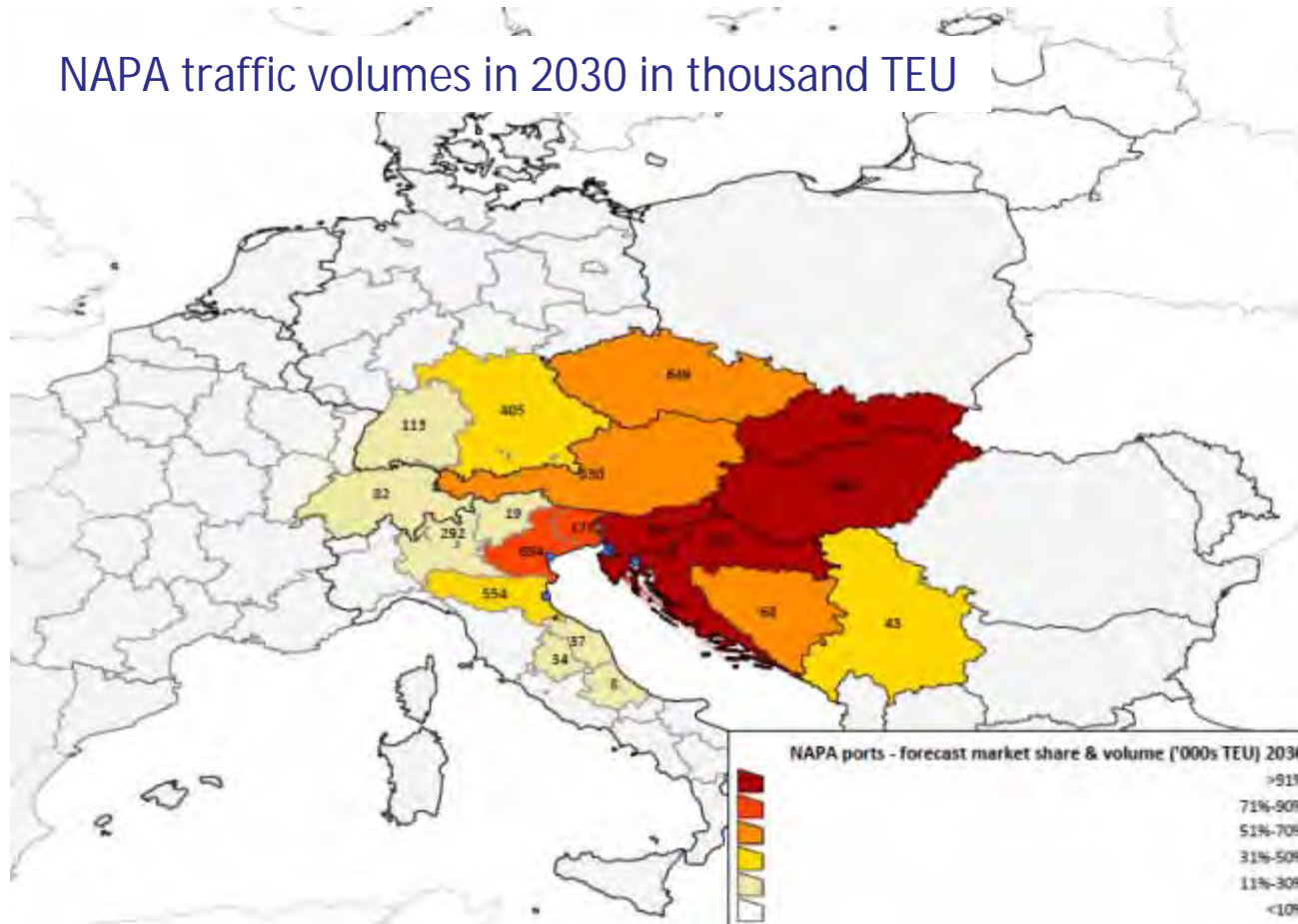
# Container market potential of NAPA ports



**NAPA**  
North Adriatic Ports Association

- The goal is to achieve 6 million TEUs by 2030

NAPA traffic volumes in 2030 in thousand TEU





# Development projects of NAPA ports - overview



## Irieste:

- Extension of Molo VII for 200 m
- Increasing capacity to 980.000 TEU/year by 2020
- New logistic platform – multipurpose terminals, 600 m of quay



## Venice:

- New Ro-Ro terminal
- New off-shore container terminal 8 Nm from Venice (?)



## Rijeka:

- Consolidation of the present Brajdica container terminal (600.000 TEU annual capacity in 2015)
- New container terminal on Riva Zagreb (planned 400.000 TEU capacity in 2017)



## Why NAPA?



- Geographic position of North Adriatic (especially from North African markets);
- Developed hinterland connections with Central and Eastern Europe,
- Alternative to North European ports;
- Reducing inland infrastructures burden;
- Balancing regional development (North-South);
- Reducing environmental impact;
- Global market conditions (reallocation of existing flows of goods, new businesses);

**NAPA'S key principle: "Coopetition"**  
"Cooperate internationally - compete internally"

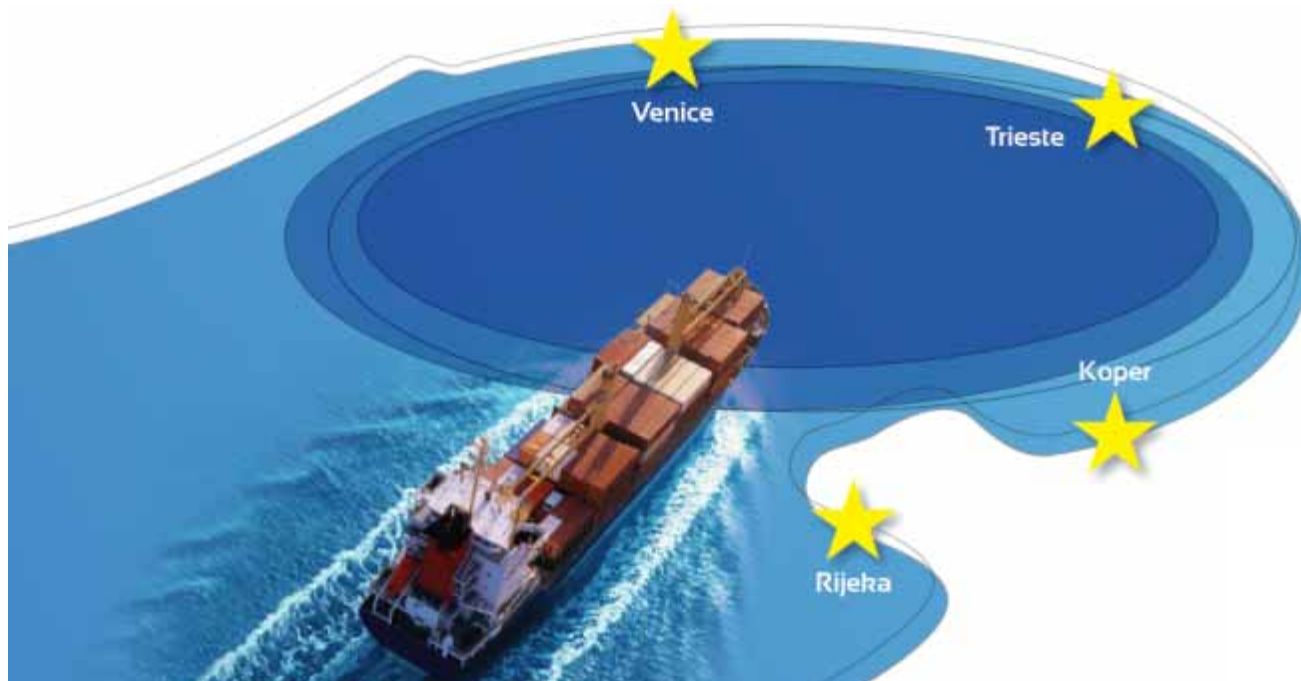


## NAPA as an opportunity for shippers from the region



- The shortest route to the heart of Europe,
- Quality, reliability and flexibility,
- Developed hinterland connections,
- Tailor-made services,
- Effective IT support,
- ISPS code compliant - security,
- Full support of customs authorities.

THANK YOU FOR YOUR ATTENTION



[www.portsofnapa.com](http://www.portsofnapa.com)