



BORUSAN PORT

AN ALTERNATIVE CONNECTION FOR THE BLACK SEA TRADE

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Agenda



➤ Borusan Port (2008-2019)

➤ Borusan Port Operations

➤ Market outlook

- Container
- General Cargo

Borusan Port (2000 - 2008)



Annual Capacity

General Cargo: 2.250.000 m.tons

Container: 135.000 TEUs

Borusan Port (2008 - 2014)



Annual Capacity

General Cargo: 5.000.000 m.tons

Container: 450.000 TEUs

Car Park: 250.000 CEUs



Borusan Port Geographical Location



- In the strategic location of East Mediterranean and Black Sea maritime routes.
- A major import and export gate into the Turkish heartland.
- A key transit hub for international trade.



Borusan Port Operations



Container



- Loading \ Unloading
- Container CFS Operations
- Reefer Container Port Services

Ro-Ro



- Loading \ Unloading
- Stevedoring
- On board lashing
- Detection and repair of small damages on cars

General Cargo

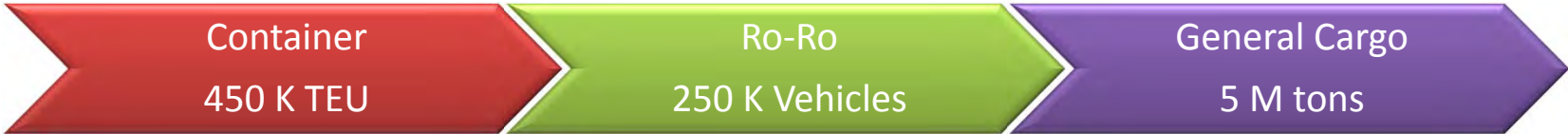


- Loading \ Unloading
- Terminal Services
- Bonded \Unbonded Warehousing

Project Cargo



- Loading \ Unloading
- L/S/D services for **all kind of oversize cargos**
- Bonded \Unbonded Warehousing



Container Operations

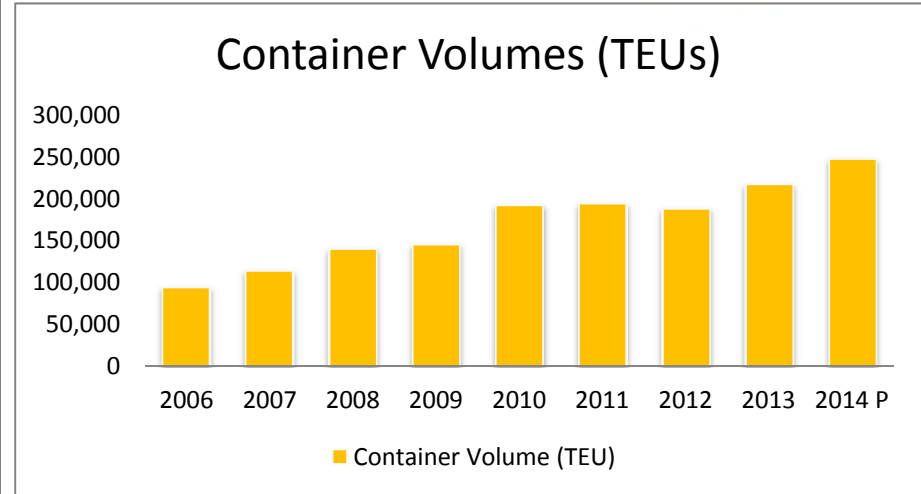
Technical Specs & Handling Volumes & Operational Performance



Borusan Container Terminal (BCT)



Berth	450m liner
Ship Type	Super Post Panamax
	14,5m depth
	400m LOA
Terminal Area	10.000+ TEUs
	20 rows, 50 m width
Equipment	120.000 sqm
	3 SSGs
	8 RTGs



- **Operation rate** : 60+ cont / hr for mainline vessels.
- **Truck turn time** : Less than 30 min.
- **Capacity** : 450.000 TEUs / year

Container Operations

IT Systems & Equipments

NAVIS SPARCS N4



-Together with other global ports, Borusan implemented Navis Sparcs N4 in March 2011.

-Container operations are tracked through automatically generated work orders.

-Prime Route ,Autostow and Expert Decking modules enable truck optimization, faster and efficient planning.



3 SSG Cranes



- 1 x 20 Row handling
- 2 x 18 Row handling
- 60 Tons lifting from 50 m.
- Twin lift spreader
- 30 + moves\hr\crane

8 RTG Cranes



- 41 tons lifting capacity
- 7+1 stacking width
- 5+1 stacking height

Stackers

- 7 Reach stackers

Container Operations

Container Services – to Black Sea



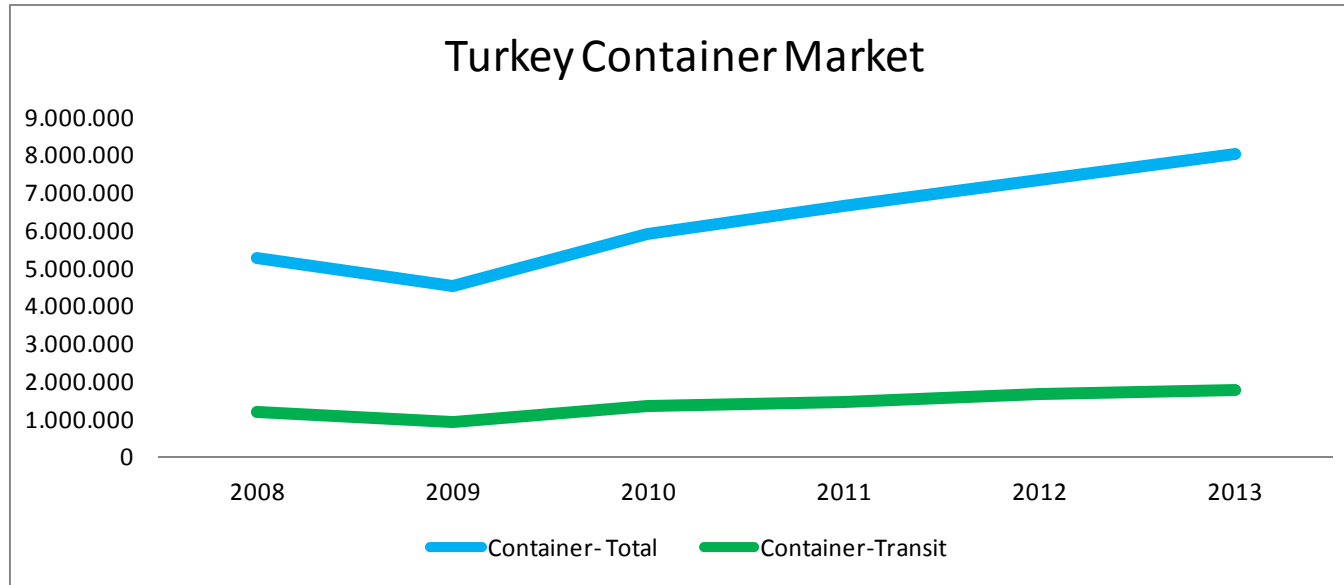
-Admiral, Zim and Global Shipping Line services call at Black Sea Ports & Borusan.

ZIM LINE : Novorossiysk – Odessa –Constanza – Evyap –Borusan – Limas – Pireaus – Haifa – Ashdod

ADMIRAL : Novorossiysk – Odessa Borusan-Mardas-Evyap-Limas-Nempont -Ashdod-Haifa

GLOBAL SHIPPING LINE:Constanza- Limas-Borusan

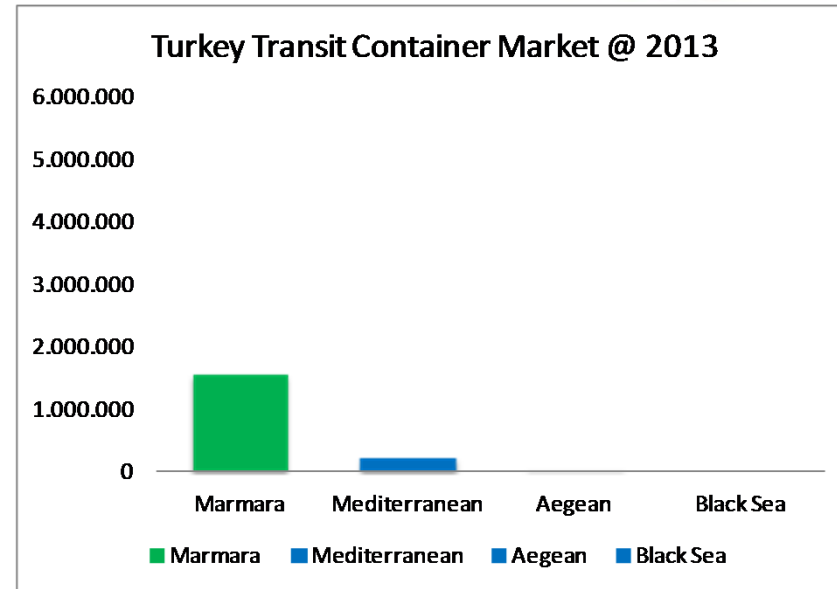
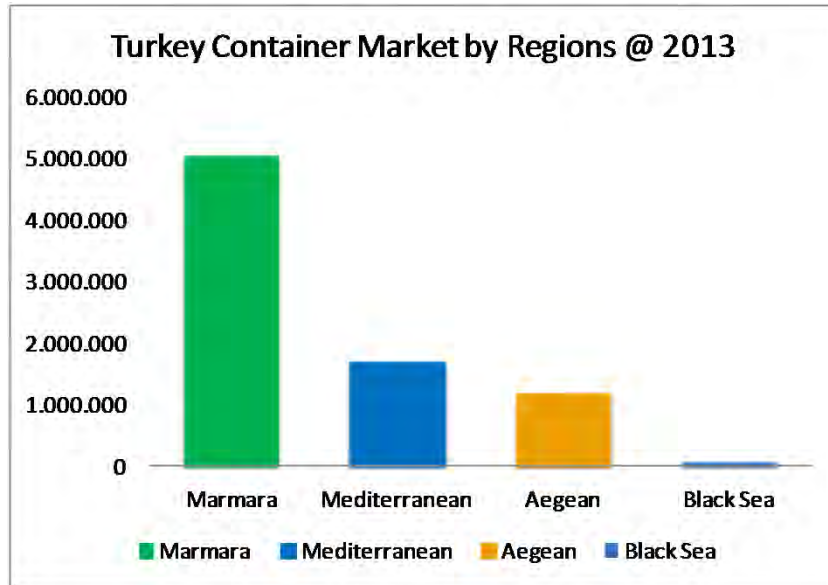
Market Outlook – Container



- **7.995** kTEUs containers were handled by Turkish ports at 2013. **1.768** k TEUs of this volume (%22) are transits.

- CAGR (2008-2013) is about % 9 for both transit and total container handlings.

Market Outlook – Container



-% **60-65** of Turkey’s container volume is being handled at Marmara.

-% **80-90** of Turkey’s transit container volume is being handled at Marmara.

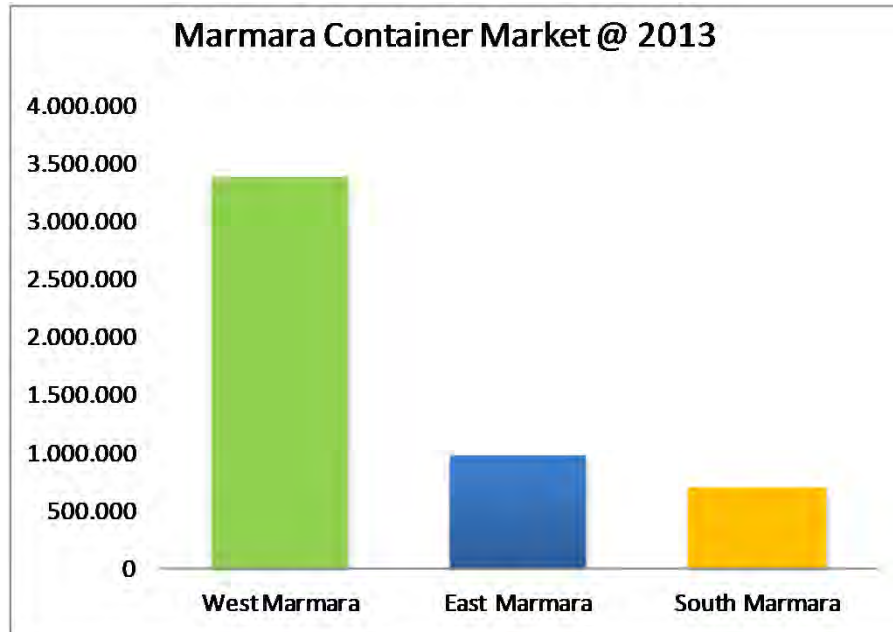
	2009	2010	2011	2012	2013	CAGR
Marmara - Growth rate	-19%	35%	13%	10%	10%	16%
Turkey -Total Growth rate	-14%	30%	13%	10%	9%	15%

➤ Marmara’s container growth rate is bigger than Turkey’s total container growth rate.



* Source : Türklim (Port Operators Association of Turkey)

Market Outlook – Container (Borusan Port)



	2013 H1	2014 H1
South Marmara - TEUs	332.517	375.021
Growth Rate		13%
Borusan	103.173	116.941
Growth Rate		13%
Marmara	2.427.059	2.572.755
Growth Rate		6%

-Borusan Port is located at South Marmara.

➤ As compared with the same period of previous year, (first half), South Marmara’s and Borusan’s container growth rate is bigger than Marmara’s total container growth rate.

General Cargo & Project Cargo Operations

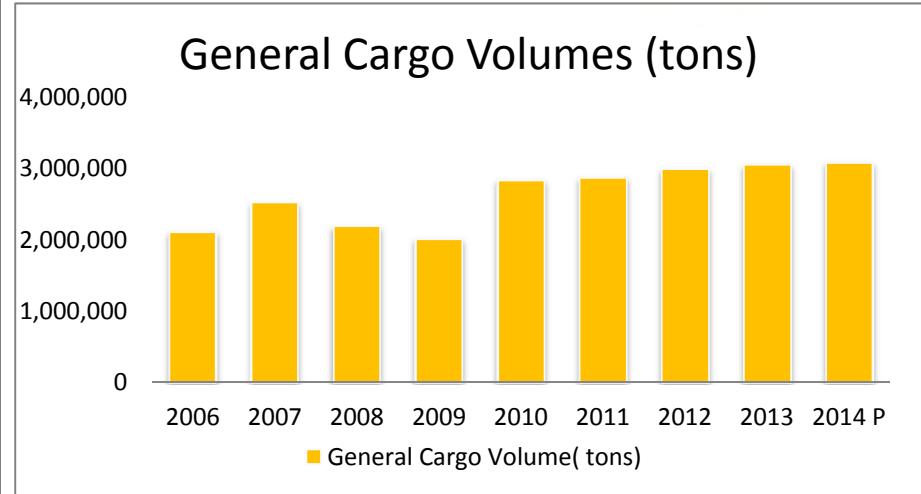
Technical Specs & Handling Volumes & Operational Performance



Borusan Multipurpose Terminal (BMT)



Berth	788m
Ship Type	Panamax
	12m max depth
	250m LOA
	65.000 DWT
Equipment	5 MHCs



- **Operation rate** : 6.000 ton / day

- **Capacity** : 5.000.000 tons / year

General Cargo & Project Cargo Operations

IT Systems & Equipments



BOPSNET (Borusan Port Service Network)

- In- house operations software system for general cargo.
- Online customer monitoring of cargo information.
- Regularly updates customers with special reports.
- Interconnects and integrastes with customer systems (EDI).
- Web-based ship registering



1 Gottwald HMK7608 Crane

Max lifting capacity: 140 Tons

2 Gottwald HMK260E Crane

Max lifting capacity: 100 Tons

2 Liebherr LHM 150

Max lifting capacity: 40 Tons

7 Heavy Tractors

13 Light Tractors

General Cargo & Project Cargo Operations

Warehouses



-Borusan Port :

- offers customers bonded and unbonded warehouses and A- type antrepot areas.
- manages ship loading, unloading, terminal and warehousing services in integration with each other.

	Closed Warehouse	Open Warehouse
Bounded	11.200 m ²	48.000 m ²
Entrepot	3.800 m ²	2.000 m ²
Total Bounded	15.000 m²	50.000 m²
Total Unbounded	-	10.000 m²
Total Area	15.000 m²	60.000 m²



Project Cargo Operations

Operational Performance



- Borusan Port handles largest export project type consignments in Turkey.
- Yearly handling volume is about 40.000 tons (varying sizes and weight).
- All kind of oversize cargos such as machines, yachtes,wind flowers and tanks can be handled at Borusan Port.
- Borusan port is a good option as a transit port to Black&Caspian Sea from Mediterrennian Far-East, West-Europe.



➤ Available stock areas for high volume lots



➤ Special equipment



➤ Experienced staff



➤ Superior location

Project Cargo Operations



-The top three highest tonnage single piece project cargo loads handled in Turkey were all dispatched from Borusan Port.

- 1.100 ton / unit
- 550 ton / unit
- 350 ton / unit



Project Cargo Operations

Gas Projects



➤ Transit Gas Pipe Operations

Borusan port provides entegrated;

- Discharging operations
- Terminal & stocking services
- Loading & lashing operations for transit gas pipes. (from Mediterrennian to Caspian)



Gas Projects @ Turkmenistan

- 37 shipments (16 vessels discharging, 21 vessels loading)
- 5.000 pieces pipes were handled as transit.(Totally 70 k tons)
- In hold,on deck loading, lashing,securing, dunnaging
- Operations without any damage
- Terminal handling services,cargo plan preparing, stock management, damage inspection



Project Cargo Operations

Izmit Bay Bridge



➤ About Izmit Bay Bridge

-Located at the eastern end of Marmara Sea, close to Izmit and approximately 50 km to southeast of Istanbul.

-Will be one of the longest suspension bridges in the world.

Izmit Bay Bridge

- Logistics transport designed with project cargo owner.
- Well organised planning processes from gate entrance to stock yard and vessel designed together with customer.
- Stock management and complementary services (painting, assembling, repairing, re-rotation etc.)
- Loading, LSD, cargo plan preparing
- 6 shipments - 48 pieces (max. tower weight 350 tons/piece) were loaded until now.
- 8 shipments will be completed in next months.



Project Cargo Operations

Wind Turbines



➤ Wind Power Plants

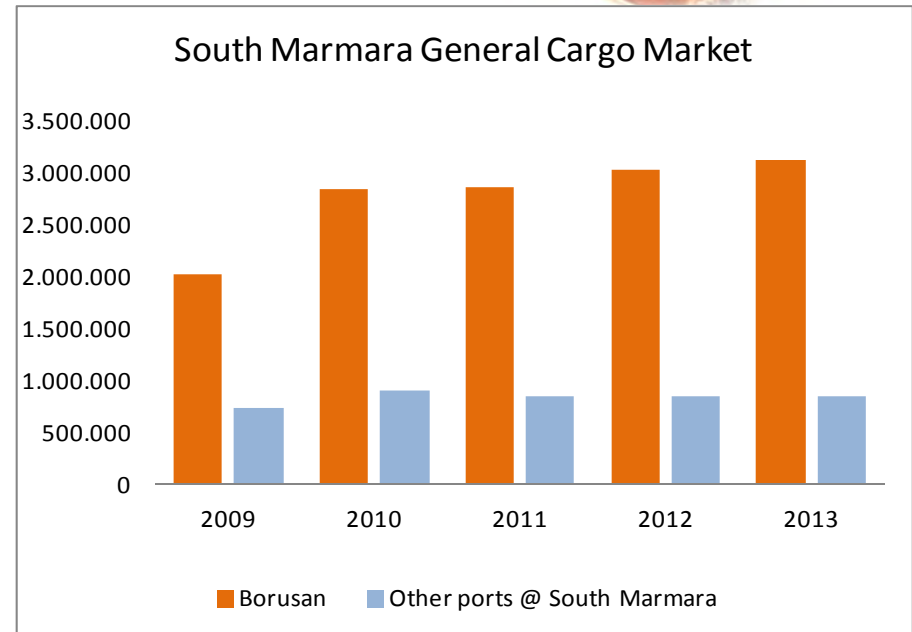
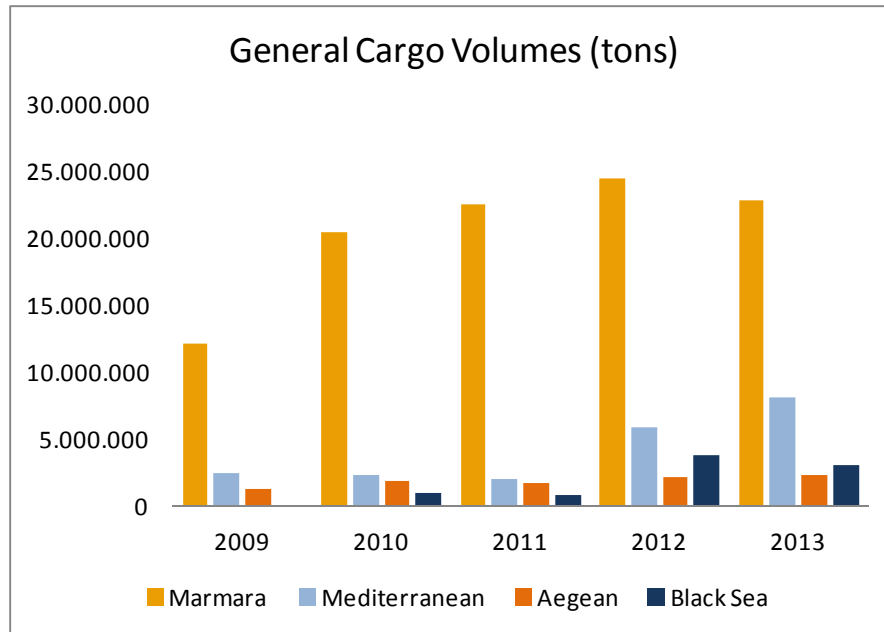
- Ship, terminal and warehousing operations of wind turbines are being handled at Borusan Port.
- Until 2006, 650 sets wind turbines were handled.

Wind Turbines @ Yalova

- 3 shipments (All discharging)
- Discharging, unlashng, inspection, terminal services and stock controlling
- 36 sets wind turbines
- Excellent operations rate (1500 tons / day) without any damage



Market Outlook – General Cargo



	2007	2008	2009	2010	2011	2012	2013
Borusan Market Share	77%	67%	73%	76%	77%	78%	79%

- Borusan Port is the leader at general cargo operations at South Marmara.
- @ 2013 Borusan Port handled 3.000.000 tons general cargo, **second biggest general cargo handling volume** in Turkey.

Conclusion...



For near future;

- The economic growth of South Marmara will be above Turkey's average,
- Due to high population and constraint of area, industrial zones and new investments will be shifting to South Marmara instead of Istanbul and East Marmara.
- After economic recovery, Black Sea Countries will attract new investment projects,

Borusan Port will be ready offering all kinds of port & terminal services;

- to consolidation and transshipment of the cargo from different parts of the world to Black Sea with **the experience, market share, equipments, capabilities.**



THANKS