

*Container shipping via Russian Black Sea ports :  
Results of 2014 and Outlooks for 2015*

4th Black Sea Ports and Shipping 2015, Istanbul, Turkey

# Who are we?

Founded in 1996. Anually handle over 200 000 TEU laden containers via Russian ports .

**No.1** Mutiregional container operator via Russian seaports

**No.4** Private container operator in Russia

**No.4** Operator of container block-trains via Russian seaports.



# MAIN BLACK SEA GATEWAYS, 2012-2014



# Russian container seaports, 2013-Q1 2015

**KALININGRAD:**  
2013: 322'636 TEU  
2014: 325'189 TEU  
Q1'15: 37'613 TEU

**ST.PETERSBURG/UST-LUGA**  
2013: 2'514'520 TEU  
2014: 2'482'245 TEU  
Q1'15: 453'439 TEU

**VLADIVOSTOK\*:**  
2013: 619'353 TEU  
2014: 670'421 TEU  
Q1'15: 110'578 TEU

**VOSTOCHNIY\*:**  
2013: 435'443 TEU  
2014: 435'934 TEU  
Q1'15: 90'927 TEU

**NOVOROSSIYSK:**  
2013: 722'417 TEU  
2014: 720'173 TEU  
Q1'15: 165'708 TEU



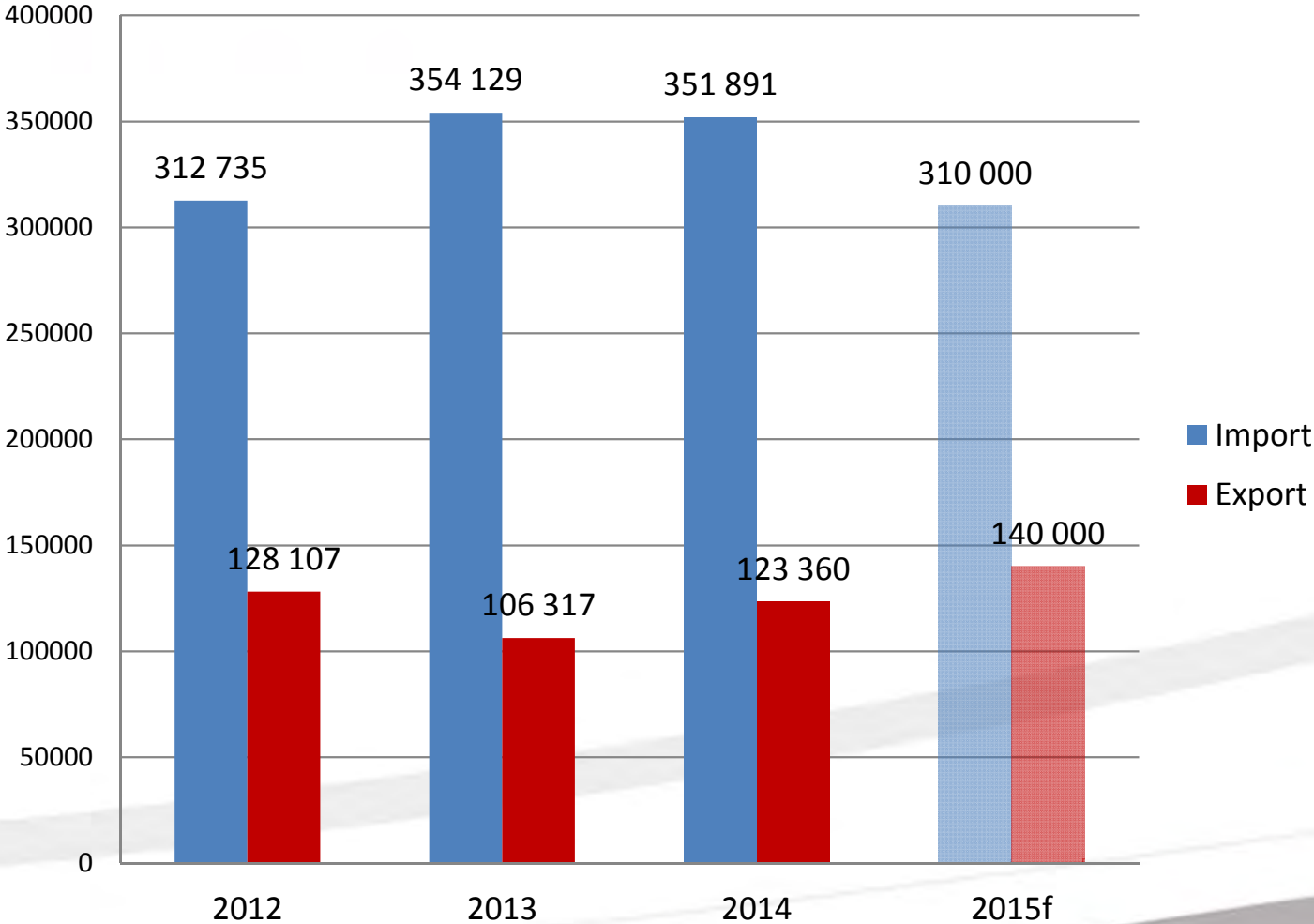
\* - EXCLUDING CABOTAGE SHIPMENTS.

## Key factors of South Russia container market in 2015

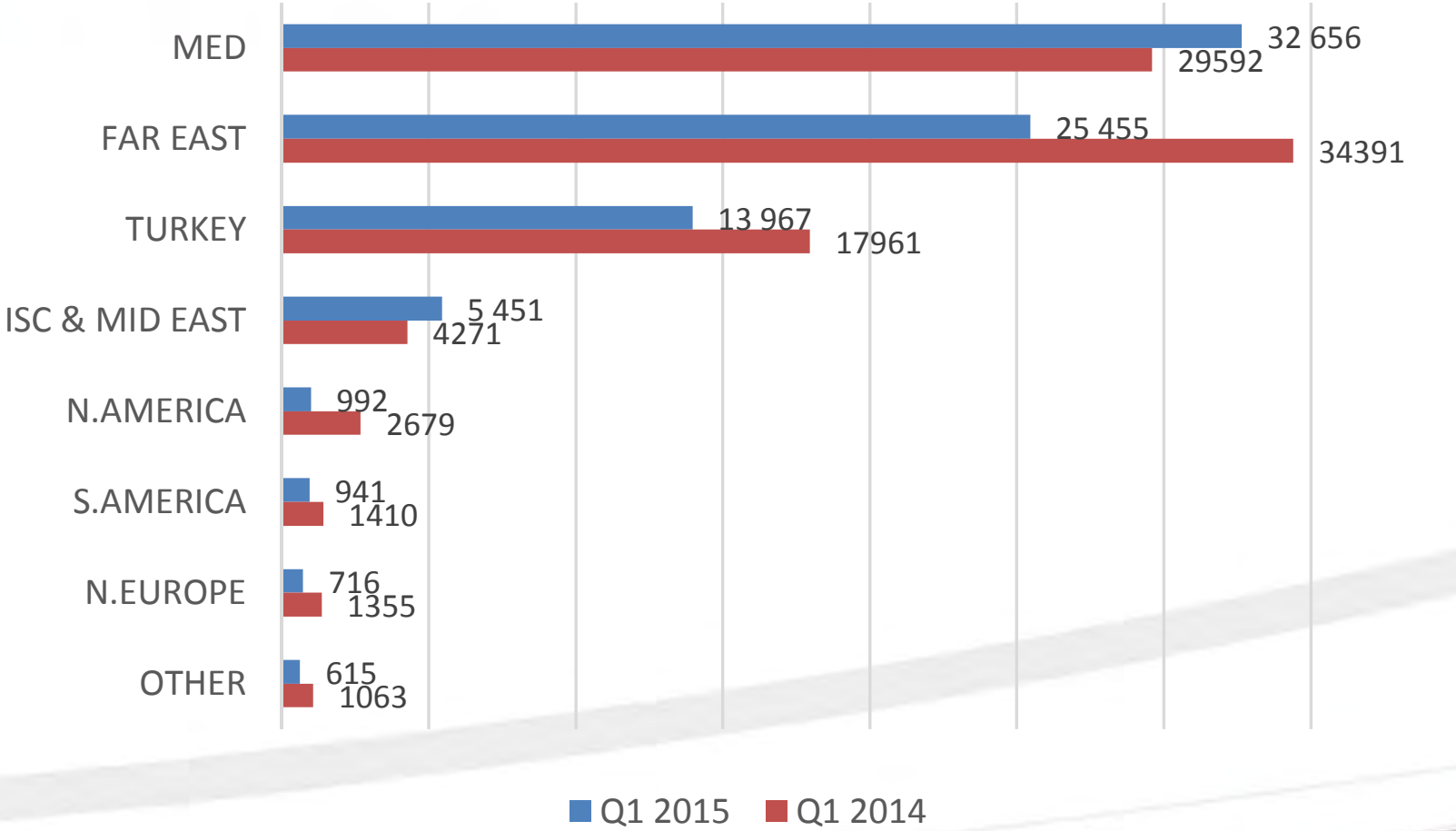
1. Russian currency devaluation by 42% YoY ;
2. Bank interest rates jumped by over 50% YoY;
3. Export dues and other restrictions on exports from Russia;
4. Russian ban on food-stuffs imports from EU and US since Aug. 2014;
5. Massive introduction of ULCS on Asia-Europe/Med trades;
6. Cascading of smaller tonnage and launching of direct services to Black Sea.



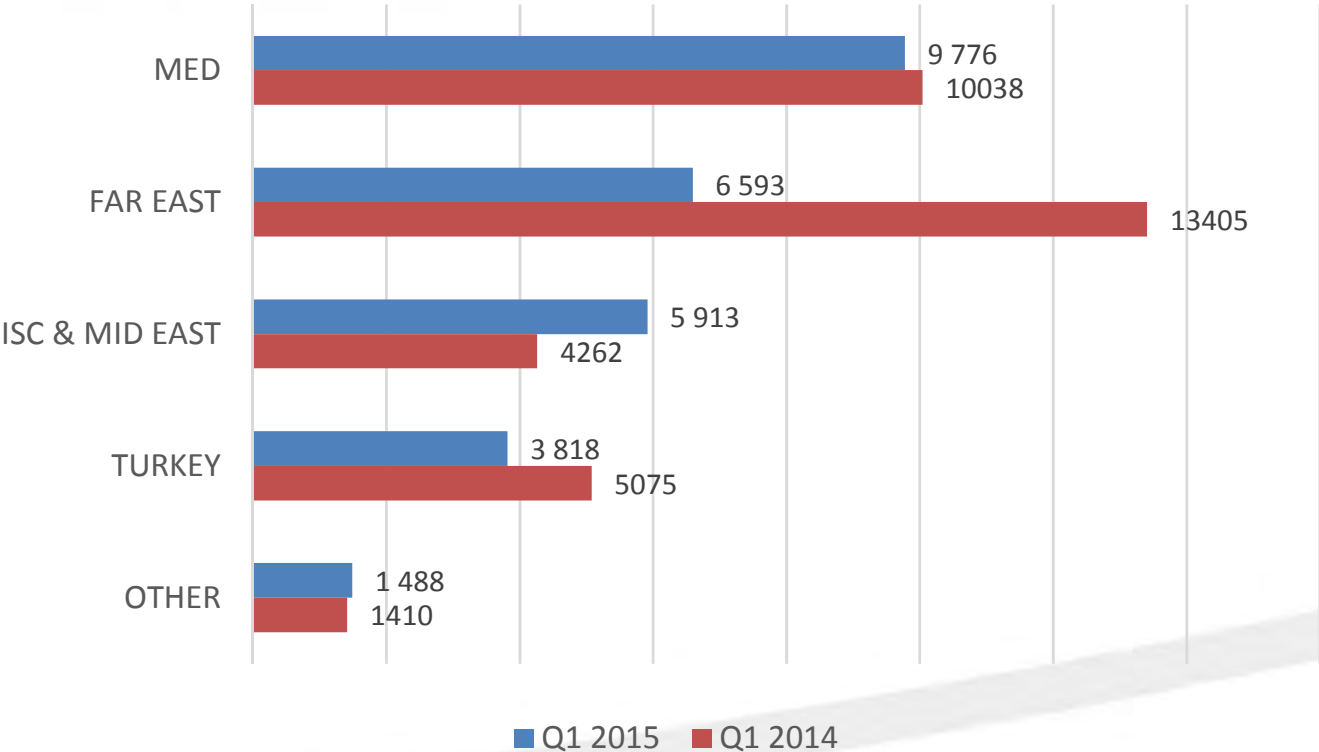
# Container transportation via Novorossiysk : 2012-2014 and forecast for 2015



# Key import trades Q1 2015/14, TEU



# Key export trades Q1 2015/14, TEU

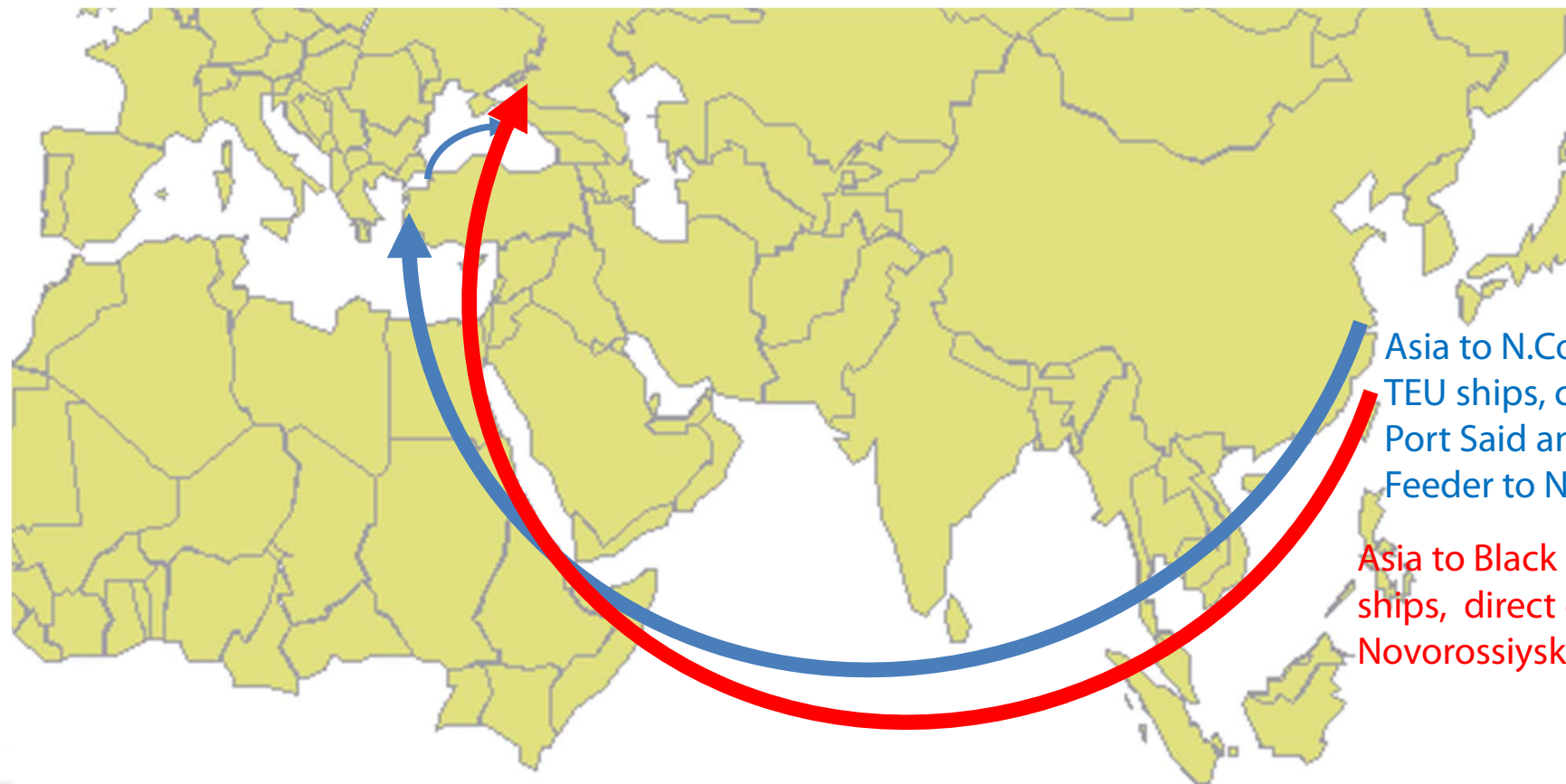




# LINER SCHEDULES TO NOVOROSIYSK, MAY 2015

	Operator	Vessels	Port rotations	Call frequency
1	ADMIRAL	3 x 860 TEU	<b>Novorossiysk</b> – Odessa – Gemlik - Ambarli – Evyap – Izmir – Alexandria – Haifa – Ashdod – Gemlik – Evyap – <b>Novorossiysk</b>	Weekly– NUTEP
2	ARKAS	2x1600 TEU	Mersin - Dekhelia– Marport - <b>Novorossiysk</b> – Marport- Mersin - Dekhelia	Weekly- NLE
3	CMA-CGM	1x300 TEU	Constanta – <b>Novorossiysk</b> – Taganrog-Constanta	Weekly– NUTEP
4	MAERSK	10x2800-3400 TEU	Guayaquil – Balboa – Manzanillo – Algeciras – Malta - Izmit– Ambarli — <b>Novorossiysk</b> -Yuzhny (Odessa)– Ambarli – Izmit– Izmir– Algeciras - Cucedo– Manzanillo – Buenaventura -Guayaquil	Weekly- NUTEP
5	MAERSK	7x4500-4800 TEU	Nhava Sheva – Hazira – Pipavav – Jebel Ali – Salalah – Port Said – Mersin – Izmit – Istanbul – <b>Novorossiysk</b> – Istanbul – Izmit-Izmir – Mersin – Jeddah – Jebel Ali – Pipavav – Hazira – Nhava Sheva	Weekly-NCSP
6	SEAGO/ZIM (seasonal)	2x2200 TEU	Alexandria– Ashdod – <b>Novorossiysk</b> – Alexandria	Weekly- NUTEP
7	MSC	2x1388 TEU, 1700 TEU	Alexandria– Ashdod - <b>Novorossiysk</b> - Mersin – Haifa- Alexandria	Weekly– NLE
8	MSC	5 x 2800 TEU	Trieste – Koper – Ravenna – Venice – Gioia Tauro –Gemlik- Evyap – Gebze – Istanbul – <b>Novorossiysk</b> – Constanta – Istanbul – Gebze – Gemlik – Izmir – Piraeus – Gioia Tauro – Trieste	Weekly– NLE
9	EMC	2x1500 TEU	Piraeus- <b>Novorossiysk</b> -Odessa-Constanta-Varna-Istanbul-Piraeus	Weekly - NUTEP
10	ZIM /OOCL	10x4250 TEU	Pusan - Ningbo-Shanghai-Da Chan Bay- Port Klang-Haifa -Istanbul – Odessa - <b>Novorossiysk</b> - Istanbul- Haifa – Nhava-Sheva– Port Klang – Da Chan Bay - Pusan	Weekly – NUTEP
11	Maersk/MSC	15x4500-5000 TEU	Yokohama-Nagoya-Pusn-Shanghai – Ningbo – Yantian – Singapore – Izmit – Ambarli – Constanta –Ilychevsk – Odessa – <b>Novorossiysk</b> – Constanta – Ambarli – Port Said – Tanjung Pelepas – Hong Kong – Yantian – Shanghai – Pusan.	Weekly – NCSP
12	COSCO/YML	2x1200-1800 TEU	Piraeus – Istanbul- <b>Novorossiysk</b> – Constanta – Varna – Istanbul- Thessaloniki - Piraeus	Weekly - NUTEP

# Two models of service from Asia to South Russia



Asia to N.Continent, 14-18 000 TEU ships, calling at Piraeus, Port Said and Istanbul Feeder to Novorossiysk.

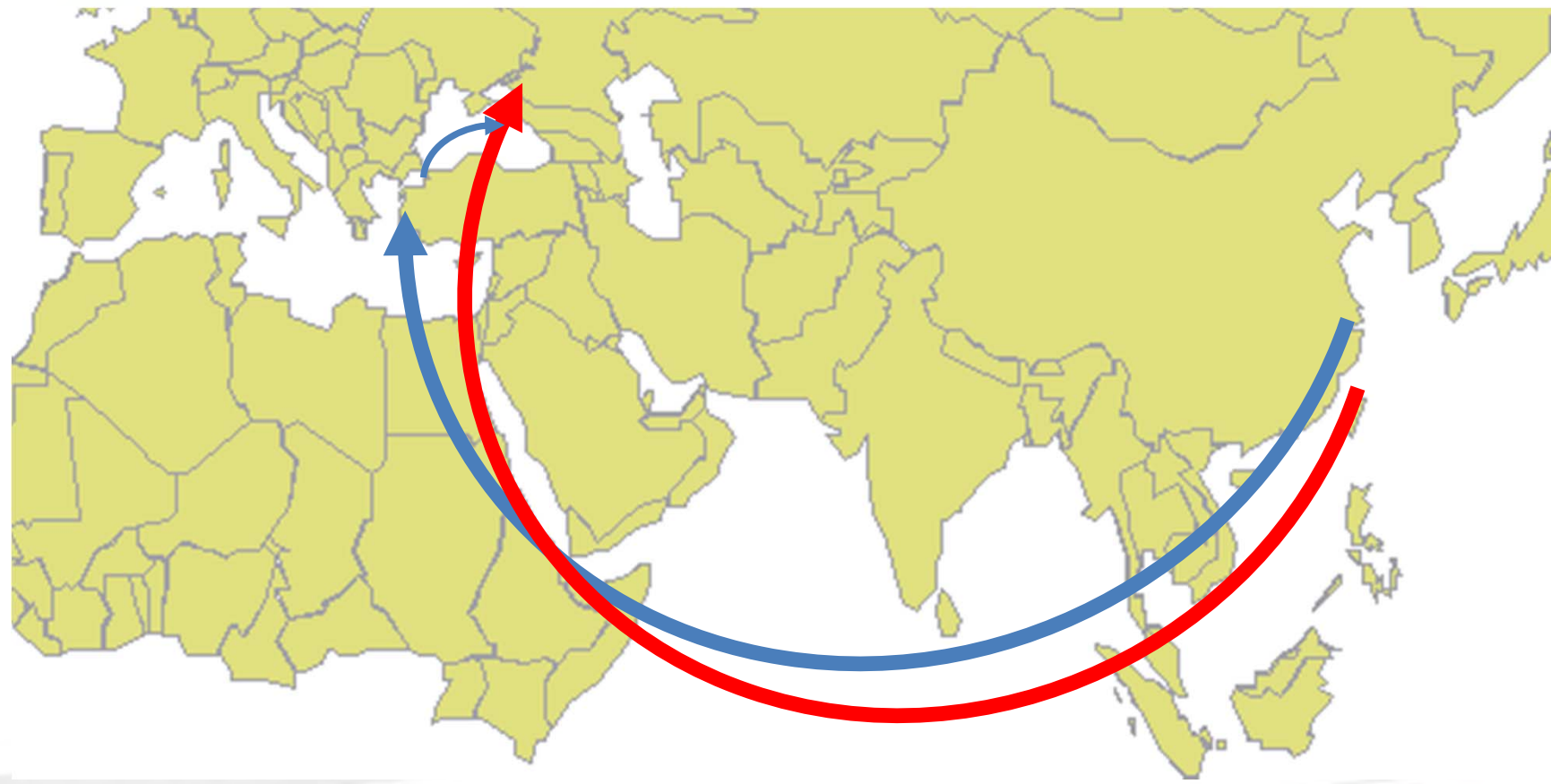
Asia to Black Sea, 4-5 000 TEU ships, direct call at Novorossiysk



➡ COSCO, EVERGREEN, MSC, YANG MING.

➡ MAERSK, OOCL, ZIM.



# Two models of service from Asia to South Russia



-  Cost efficiency and flexibility
-  Speed and mostly fixed day arrivals.





# Short-sea trade from Med to South Russia



**Seasonal:** Arakas, CMA-CGM, Seago

**Regular:** Admiral, MSC, ZIM

**October till June:** up to 12-15 000 TEU a month

**Season period gets longer!**



# Port terminals of Novorossiysk



TEU	NLE	NCSP	NUTEP	TOTAL
Carriers	MSC, ARKAS	ZIM/OOCL, MSK, MSC	MSK, EMC, ZIM, ADMIRAL, CMA	
Capacity, TEU	<b>300'000</b>	<b>180'000</b>	<b>350'000</b>	<b>830'000</b>
Q1'2015, TEU	64'419	33'628	67'148	165'195
Utilisation %	86%	75%	77%	79%

1. Shortage of quay and yard infrastructure at port terminals;
2. Import/ export volume and container equipment imbalance;
3. Significant seasonality of demand;
4. Foreign trade and financial regulations of Russia.

1. Using off-dock terminal of Ruscon as buffer handling facility for import and export container flows;
2. Rendering port forwarding services to shippers and liners at terminals of Novorossiysk;
3. Long-term contracts and partnerships with the leading market players and vendors;
4. Streamlining of operations, cost and risk cutting to ensure more lean and market fit products.



# THANK YOU!

