



Latest Trends and Developments in the Black Sea, Shipping Market MAY 2015

- Turkey importance for Seatransportation in the Black Sea Region
- Today and future of roro and container shipments in the Black Sea Region
- Turkish seaports hub significance in the multimodal shipments **

Introduction

- Speaker introduction
- Brief company introduction for Turkey
- Brief company introduction for Region



Corridor, Hub, Gateway

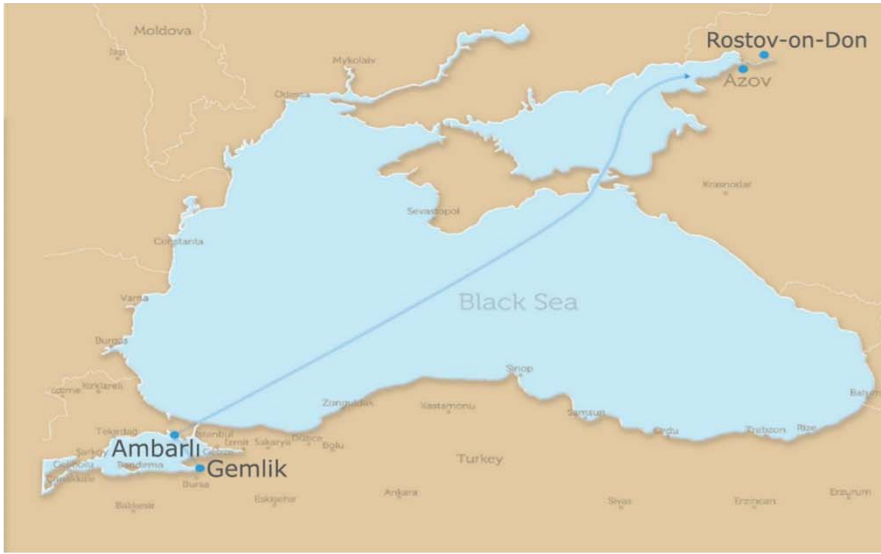
- Corridor: European corridor from Danube to Black Sea
- Corridor: Caucasus corridor to Caspian Sea
- Corridor: Marmara Sea + Bosphoruscorridor to Black Sea
- Gateway: Samsun, Iskenderun, Constanza, Poti, Illychevsk, Rostov...
- Hub: Marmara ports –inbound
- Hub: Constanzaports –inbound
- Hub: Marmara, Illychevsk, Constanzaports -outbound



Turkey: Intra Black Sea Services

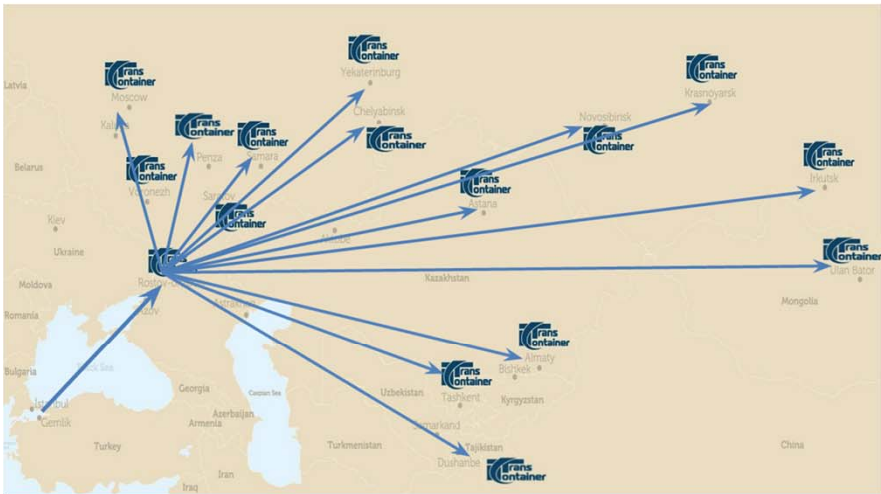
- Recognition of container services between Turkey and other countries
- Recognition of roroservices between Turkey and other countries
- East and West black sea differentials
- Brief view on Azov Sea services





Sea Routing

Frequency: Every 10 days



Truck & Rail Routing



Today and New Trends

Today in containers:

- Istanbul hubbingin/out booming and its reasons
- Direct market services (MSC, CMA CGM, Arkas, LAMRus, Admiral...)
- Main ports and current dynamics
- Ukraine as a gateway for Baltic ?
- Geopolitical situation and business environment

New trends in container:

- Mid size international line eyeing the Black Sea
- All mid size have set ups in Turkey and looking at hubbingthere
- Possible south hubbingduring fruit and vegetables season
- Direct service linking the Caspian Sea
- Geopolitical situation and business environment



Today and New Trends

Today in roro:

- Derinceas a Black Sea hub for pccmarket
- Haydarpaşaas a gateway for roro
- Direct market services by roroand ropax(Stena Sea Line, Ukrferry...)
- Main ports and current dynamics
- Ukraine as a gateway for Russia and Central Asia
- Geopolitical situation and business environment

New trends in roro:

- Mid size pcc to expand in Black Sea
- Impact of Derinceport's privatization
- Autoportissue
- Development of gateway ports such as Samsun, Illychevsk
- Development of multimodal roroservices ? i.e. Europe, Turkey, Russia
- More competition !
- Geopolitical situation and business environment



Container vs Roro

Advantages		Disadvantages	
container	roro, ropax	container	roro, ropax
Worldwide market	Truck intake	Less intake	Customer
45' development	Moreregular frequency	Multimodalinfrastructure	Bunkerprice
Longdistance cheaper	One godoor to door		



Caspian Sea's influence and impact

- Caspian Sea a tremendous market
- Caspian Sea: difficulties and its impact in the black sea market
- Important development of Caspian Sea port and its impact on the Black Sea
- Impact of high rates in Georgia and in the Caspian Sea feeder services on the Black Sea
- Current roroand container services in Caspian Sea
- Development of roroservices in Caspian Sea
- Development of container service from Black Sea to Caspian Sea



Future developments

- More development of Istanbul ports for hubbing(Asyaportimpact)
- Development of Turkish black sea ports
- More development of Azov Sea ports
- Impact of north sea, balticsea low sulphuremission regulation





Thank you for your attention

