



# HHLA TK Estonia in Tallinn / Muuga Port

## Your logistical hub in the Baltics

September 2021

**Hamburger Hafen und Logistik AG (HHLA) is a leading European port and logistics company, listed since 2007.**

**The City of Hamburg holds 69 % of shares in HHLA; the remaining 31 % are in free float.**

**The company's activity spans from the Port of Hamburg to many parts of Europe.**



# Business activities are divided into four segments



## Container

- Container throughput
- Container-related services (e.g. storage, repair)

€ 737.5 million revenue\*

€ 65.4 million EBIT\*



## Intermodal

- Container transport via rail and truck in the ports' hinterland
- Operation of inland terminals

€ 476.8 million revenue\*

€ 88.3 million EBIT\*



## Logistics

- Specialist handling of dry bulk, break bulk, vehicles, fruit, etc.
- Consulting and training
- Project Logistics

€ 51.4 million revenue\*

€ -3.9 million EBIT\*



## Real Estate

- DNA of HHLA and business card of the city
- Development and commercialization of Speicherstadt and Fischmarkt

€ 38.1 million revenue\*

€ 12.9 million EBIT\*

\* 2020 figures

# Container terminal operations form the core of business activities with a throughput of 6.8 million TEU in 2020 in Hamburg and abroad



## Container Terminal Altenwerder

- One of the most modern terminals in the world
- Very high degree of automation



## Container Terminal Burchardkai

- Largest container terminal in Germany
- First facility in Europe to introduce tandem cranes



## Container Terminal Tollerort

- Smallest but most flexible terminal in Hamburg
- Rail terminal built with five curved tracks



## Container Terminal Odessa / Ukraine

- Largest container terminal in the Ukraine
- Success story for HHLA foreign investment since 2001



## HHLA TK Estonia / Tallinn

- Largest container terminal in Estonia
- Terminal acquired in 2018



## HHLA PLT Italy / Trieste

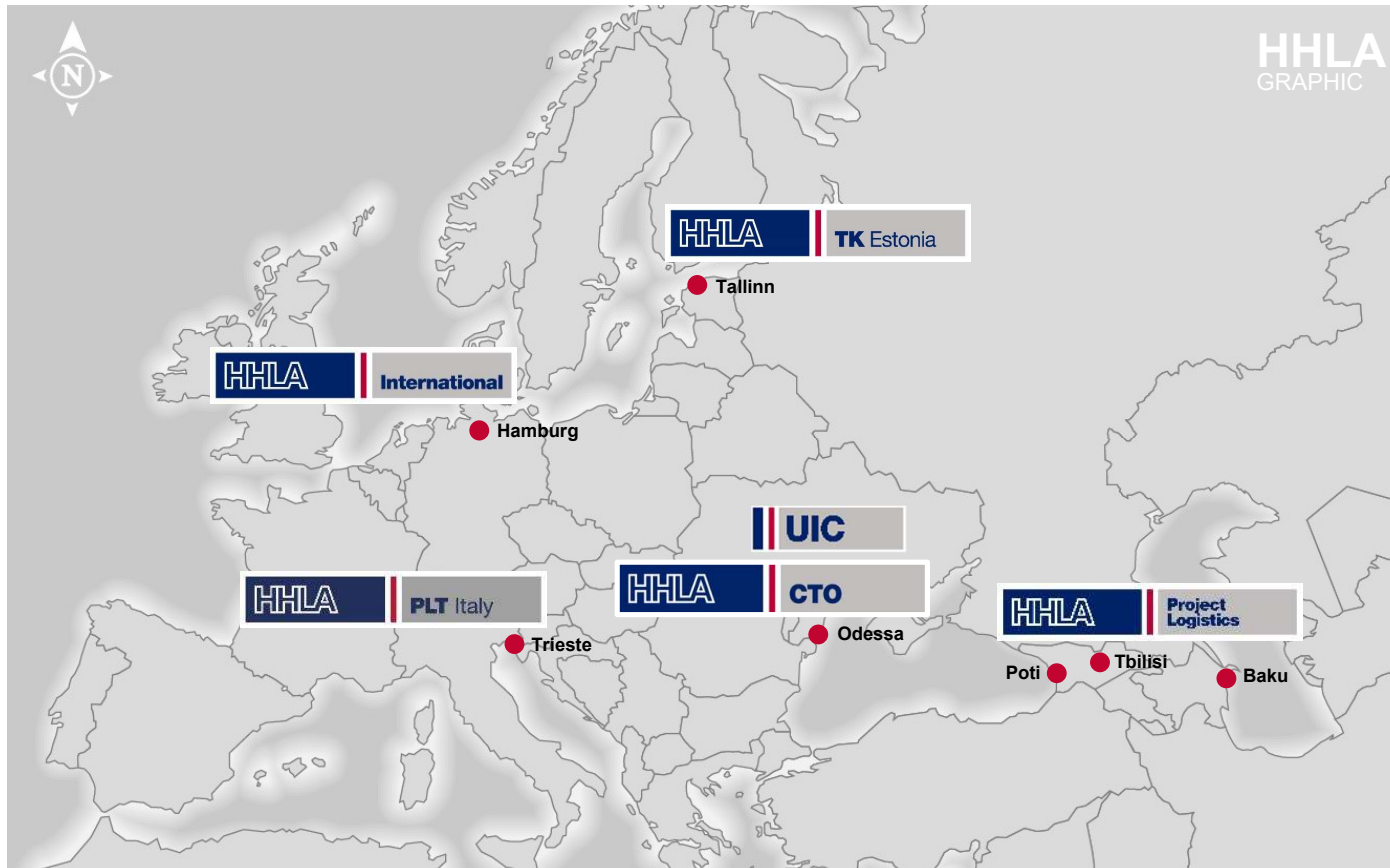
- New multipurpose terminal in Italy serving the Adria
- Majority acquired in January 2021

Hamburg Terminals: 6,193 kTEU in 2020

Terminals abroad (HHLA International): 584 kTEU in 2020

# HHLA International GmbH is responsible for the management and development of HHLA's international terminals

HHLA INTERNATIONAL ENTITIES IN UKRAINE, ESTONIA, ITALY AND GEORGIA

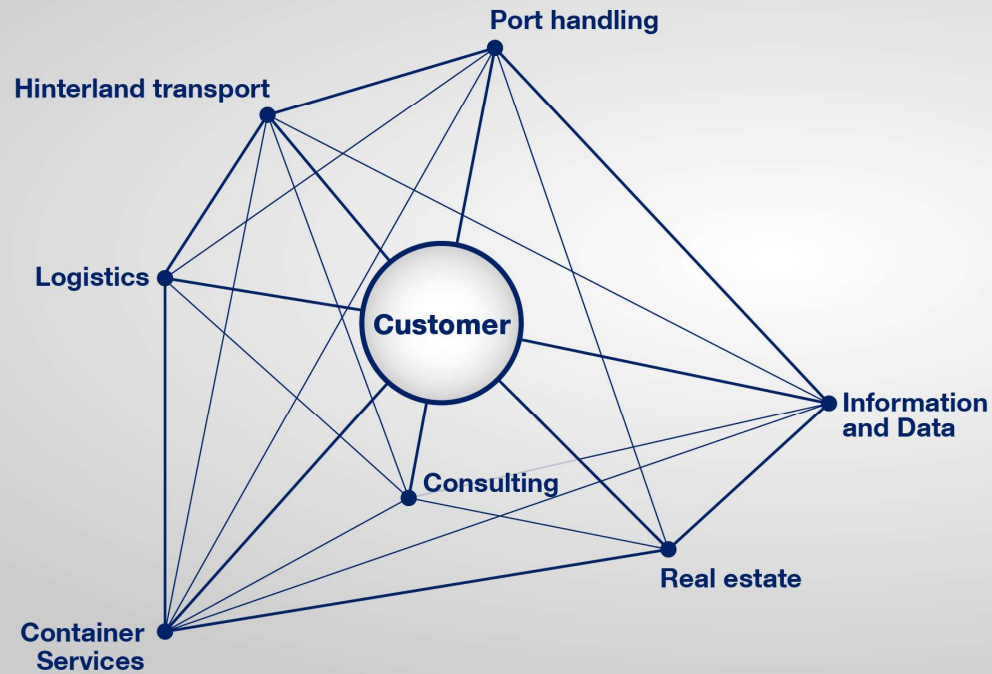


## HHLA International GmbH

- Established in 2017
- 100% owned subsidiary of HHLA, based in Hamburg, responsible for
  - Strategic management and development of the international subsidiaries of HHLA
  - International development of terminal portfolio of HHLA through acquisitions or new developments
- Currently five entities under management:
  - Three container terminals (CTO, TK Estonia and PLT Italy)
  - One intermodal operator in Ukraine (UIC)
  - One freight forwarding company (HHLA Project Logistics, focus on project cargo)

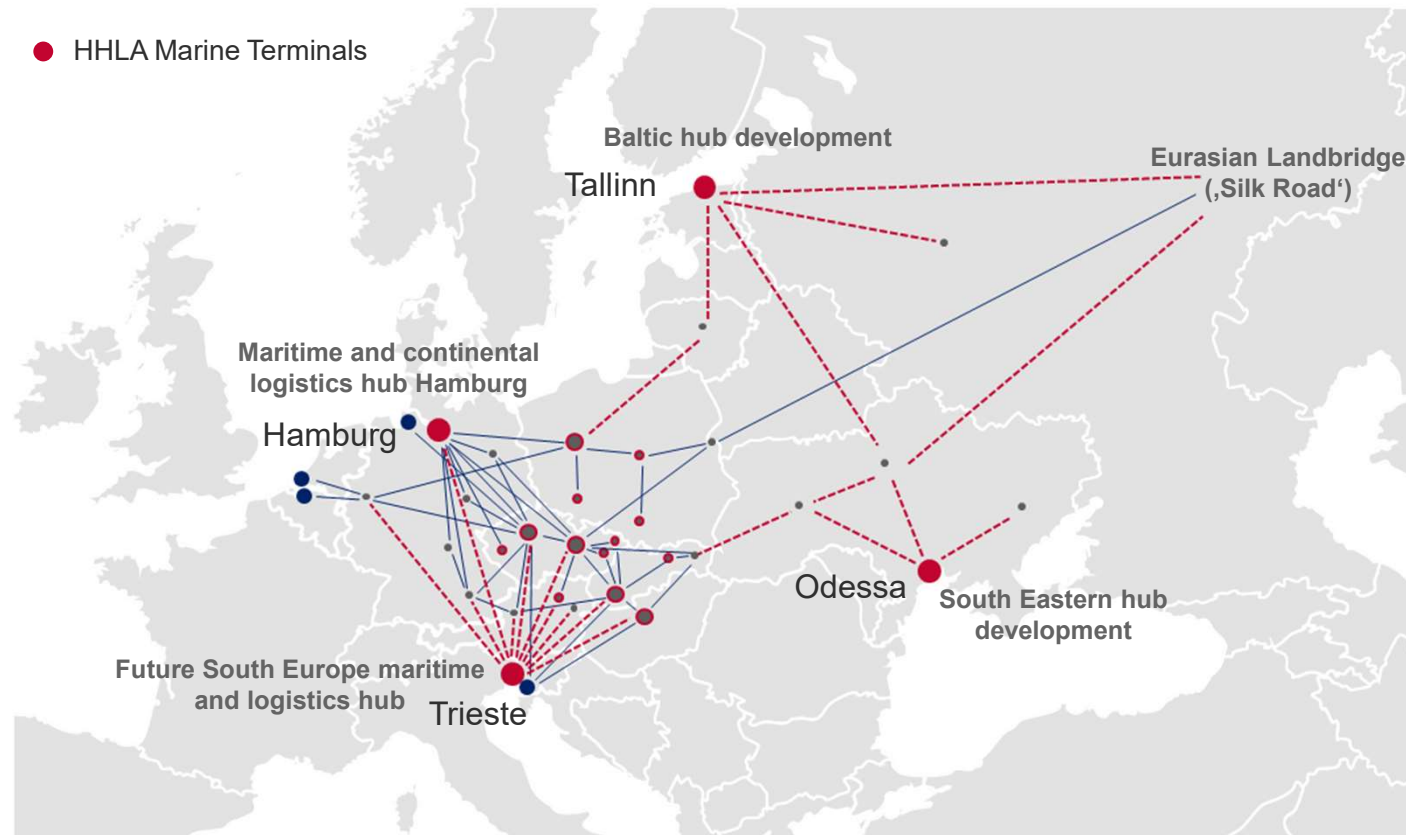
# HIG activities are increasingly visible on the HHLA map

We come from Hamburg, are at home in Europe and travel the world. As the gateway to the future, we offer our customers the best way to transport their goods sustainably and efficiently.



# Ambition to integrate existing (and new) facilities into HHLA's growing hinterland network

## Integration of maritime and hinterland networks for efficient supply chains



- Focus on development of interlinked regional hubs to efficiently serve the (European) hinterland
- Strong focus on railway connections, e.g.
  - Support of Amber train in Baltics States
  - Support to re-establish Tallinn as gateway for Russia
  - Efforts to position TK as part of OBOR initiative
  - Establishment of UIC to improve intermodal offering in Ukraine
  - Set-up of intermodal connections in Trieste and integration into Metrans network
- Development of non-container activities and value added services, to diversify and bind customers
  - Support in attraction of customers for value added services at TK and CTO
  - Support of cross subsidiary activities, e.g. Project Logistics and terminals

# Amber Train

Intermodal freight connection between Finland and Middle and South Europe

36,000 trucks / month between Finland - Estonia



## Multimodal ferry – rail – truck connection:

- Easy first mile – last mile transport with semi-trailers
- Port hubs enable flexible handling
- Start: 2x weekly service, development: 4x weekly service



## Preparing grounds for Rail Baltica:

- Route: Helsinki – Muuga – Kaunas – Warsaw/other hubs
- Customer attraction
- Good cooperation between international partners in 3B



## Adressing the climate neutrality goal:

- Activity withing the EU climate neutrality package – Shift2Rail
- Better infrastructure capacity usage
- Customers in Finland value sustainability aspect





## Ro-ro services are currently a key customer group for the terminal



Ro-Ro terminal in Muuga, Estonia



Ro-RO terminal in Trieste

# General cargo operations include mainly handling of aluminum, sawn wood and pig iron



**Aluminum unloading for global resource company**



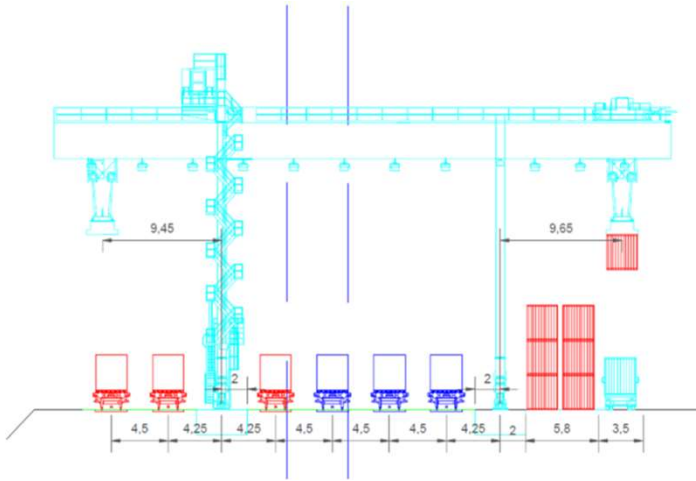
**Pig iron unloading for neighboring steel mill**



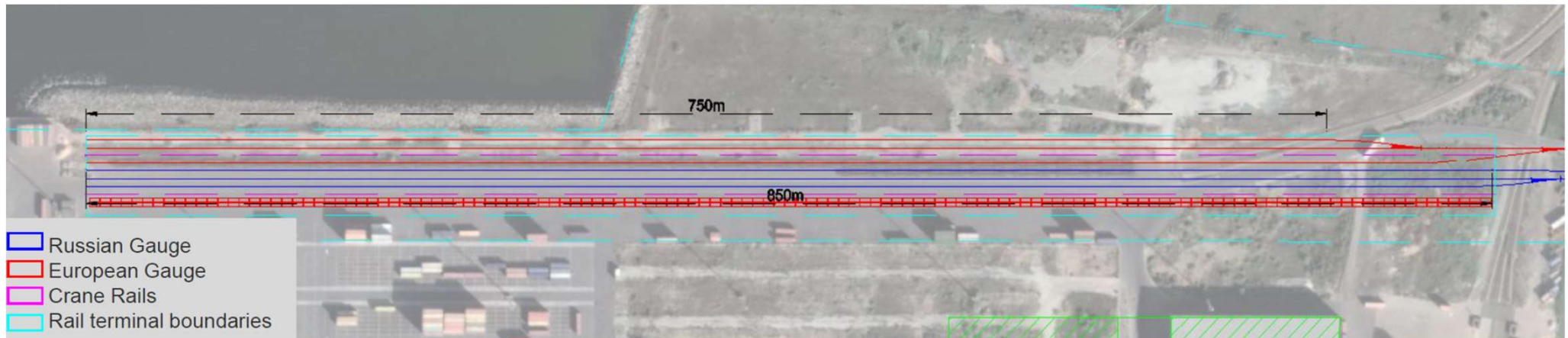
**Sawn wood storage at former GCT terminal for regional exporters**

# Rail Baltica: direct access to European rail network

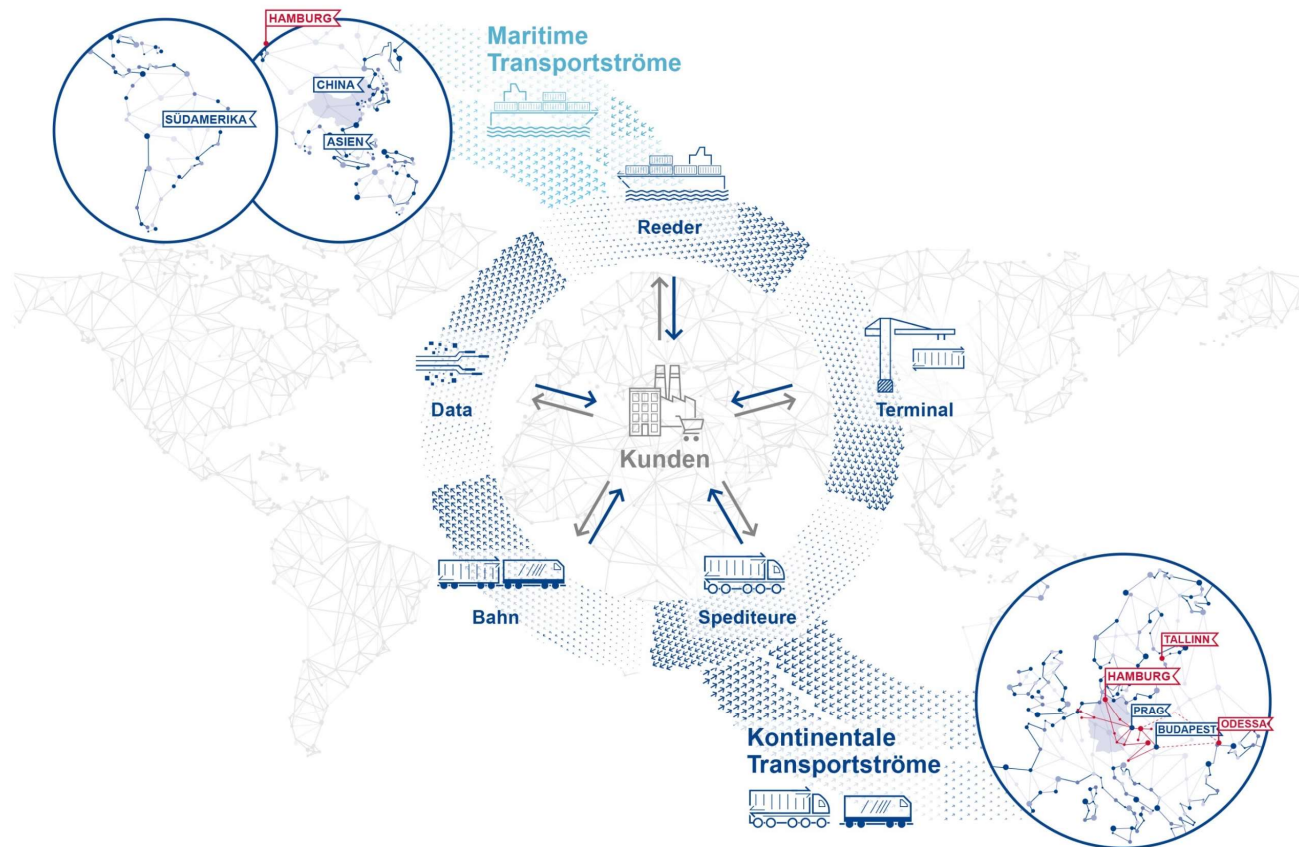
Variety of modality shifts in the future terminal



- Start of Rail Baltica to be in Muuga Port, with main terminal on the territory of HHLA TK Estonia, detailed technical design ongoing
- Agreed design will allow seamless transfer of cargo between RoRo – European / Russian gauge railway as well as from Russia to European gauge (and vv)
- Layout will allow to accommodate full block trains for both gauge widths
- Layout allowing to accommodate sea going containers as well as trailers (cranable and likely non-cranable trailers)



# HHLA vision is to be a gateway to the future and to become a logistical and digitally innovative hub along logistics chains



- HHLA a gateway to the future by offering its customers the best way to transport their goods safely, quickly and efficiently
- HHLA Group one of the leading port logistics provider in Europe
  - using state-of-the-art handling technology, innovative IT systems and automation
  - providing a very dense rail network linking major European ports to CEE
  - operating highly-efficient shuttle trains and inland terminals
  - connecting transport streams and data streams
- Vision to become a major logistical and digital node along evolving maritime and land-based transport routes

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