



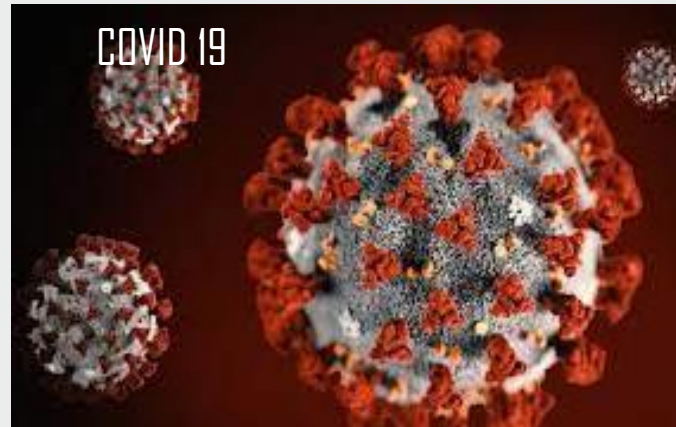
**TRANSPORT SOLUTIONS**



## GLOBAL CHAIN CHALLENGES: BALTIC SEA – BLACK SEA

- The Black Sea freight market:  
yesterday and today
- Ferry service – cargo traffic analysis
- Rising freight rates – challenges and new opportunities for  
shippers
- New transport projects

# FREIGHT MARKET GROWTH FACTORS



New COVID 19 outbreaks  
and introduction of quarantine in the ports of  
China





## CONTAINER SERVICE

Since the beginning of 2021, container shipping spot freight rates have continued to rise due to port congestion and the major imbalance between demand and maritime container transport effective capacity.

Rising Freight Rates  
From 2 till 5 times\*

\* depending on the route



## CMA CGM MAKES THE DECISION TO STOP ALL SPOT RATE INCREASES



Date: 10/09/2021

Reference: 20

### CMA CGM MAKES THE DECISION TO STOP ALL SPOT RATE INCREASES

Dear Valued Customers,

Since the beginning of 2021, container shipping spot freight rates have continued to rise due to port congestion and the major imbalance between demand and maritime container transport effective capacity.

Although these market-driven rate increases are expected to continue in the coming months, the **Group has decided to put any further increases in spot freight rates on hold** for all services operated under its brands (CMA CGM, CNC, Containerships, Mercosul, ANL, APL).

This decision applies to spot rates and is **effective immediately until February 1, 2022**.

CMA CGM is also investing heavily to strengthen its service offering. The Group has increased the capacity of its operated fleet by 11% since December 31, 2019, through the addition of new vessels and the purchase of second-hand vessels. Over the last 15 months, the Group has also increased its container fleet by 780,000 TEUs.

Through these measures, CMA CGM aims at strengthening its valuable customer relationships and providing support as they navigate today's difficult supply chain challenges.

For more information, please contact your usual sales representative.

CMA CGM Shipping Agencies Ukraine on behalf of CMA CGM Group

BETTER WAYS

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# THE BLACK SEA FREIGHT MARKET

## General Cargo (USD/t)

### Turkey - Ukraine



JULY  
AUGUST  
SEPTEMBER

2020

8  
9  
9

2021

16-17  
18-19  
20-21

GROWTH  
**2,3** times

### Georgia - Ukraine



JULY  
AUGUST  
SEPTEMBER

2020

13  
14  
14

2021

17-18  
18-20  
20-22

GROWTH  
**1,5** times

# FERRY SERVICE

Turkey - Ukraine

2020

2021



700-  
800\$

650-  
750\$

**- 50\$ / truck**

Georgia - Ukraine

2020

2021



1 000 \$

1 100 \$

2 150 \$/w  
33,5\$/t

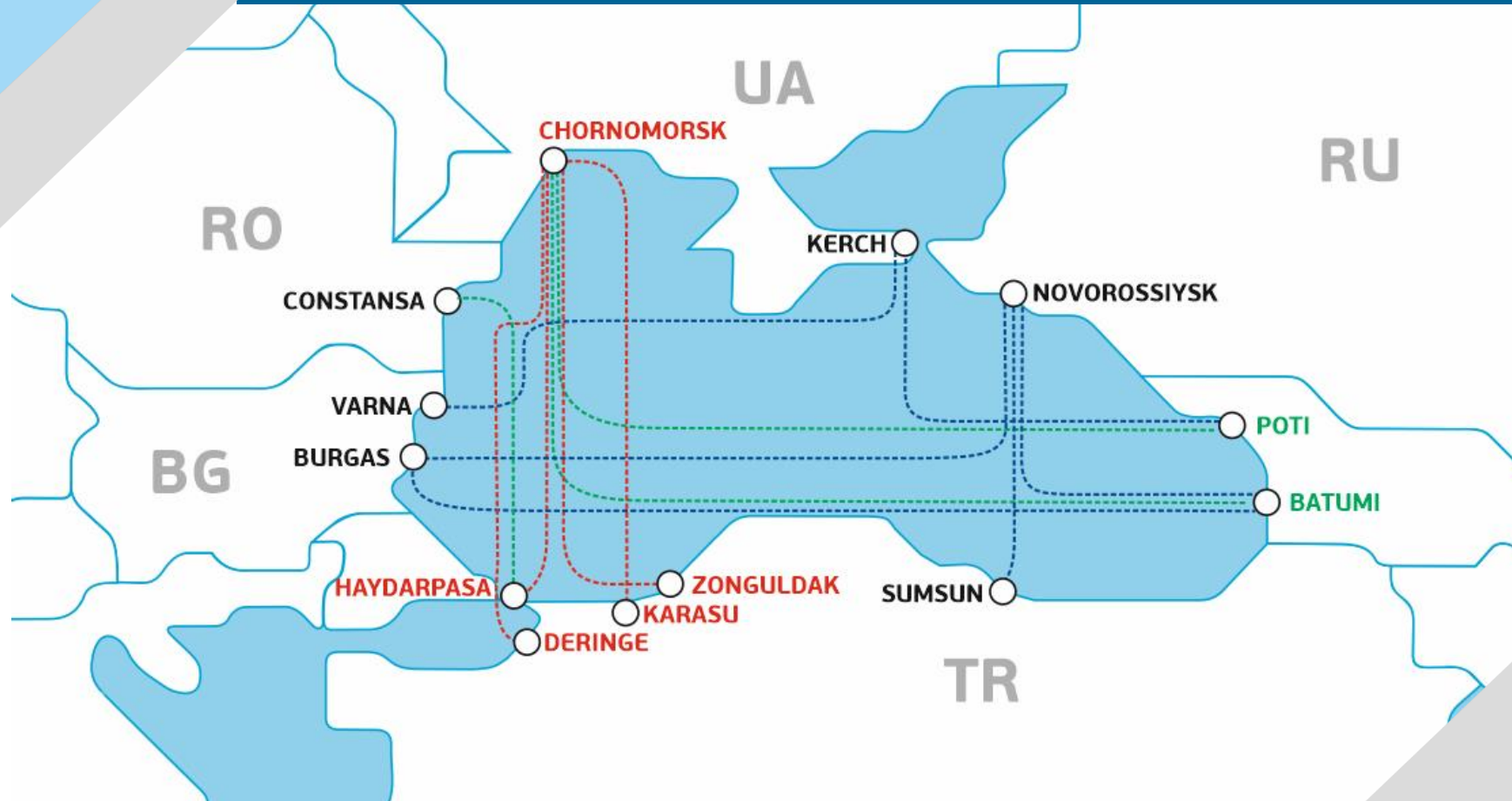
2 150 \$/w  
33,5\$/t

**+ 100\$ / truck**

**0\$ / wagon**



# Ferry transportations in the Black Sea – marine routes for intermodal transportations





# Ferry Complex at the Sea Trade Port of Chornomorsk (Ukraine)







## Ferryboat Calls to the Sea Port of Chornomorsk



3 calls per week  
(Batumi/Poti, Georgia)

2 calls per week  
(Karasu, Turkey)



1 call per week  
(Derince, Turkey)



3 calls per week  
(Istanbul (Haydarpasha), Turkey)

3 calls per week  
(Zonguldag, Turkey)



## Trade Turkey — EU

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Turkey is the 5<sup>th</sup> largest trade partner of EU, export market and import supplier.

Certainly EU is a number one partner of Turkey for import and export. This way, total merchandise trade in 2020 made up about 164 billion Euro. An essential part of this trade is realized through road transport (trucks and trailers).



## Trade Turkey - EU: transit opportunities for Ukraine and the Baltic Sea countries

Overall freight transport between the Baltic countries and Turkey is about 55 000–60 000 items/year. Goods transport between Turkey and the Scandinavian countries make up about 10 000 items/year.

Transport connection between Germany and Turkey is about 200 000 items / year, whereas about 15 000 - 20 000 items/year have their destination point in the Eastern part of Germany, close to Poland.

As a result, total potential traffic is about 90 000 items/year.



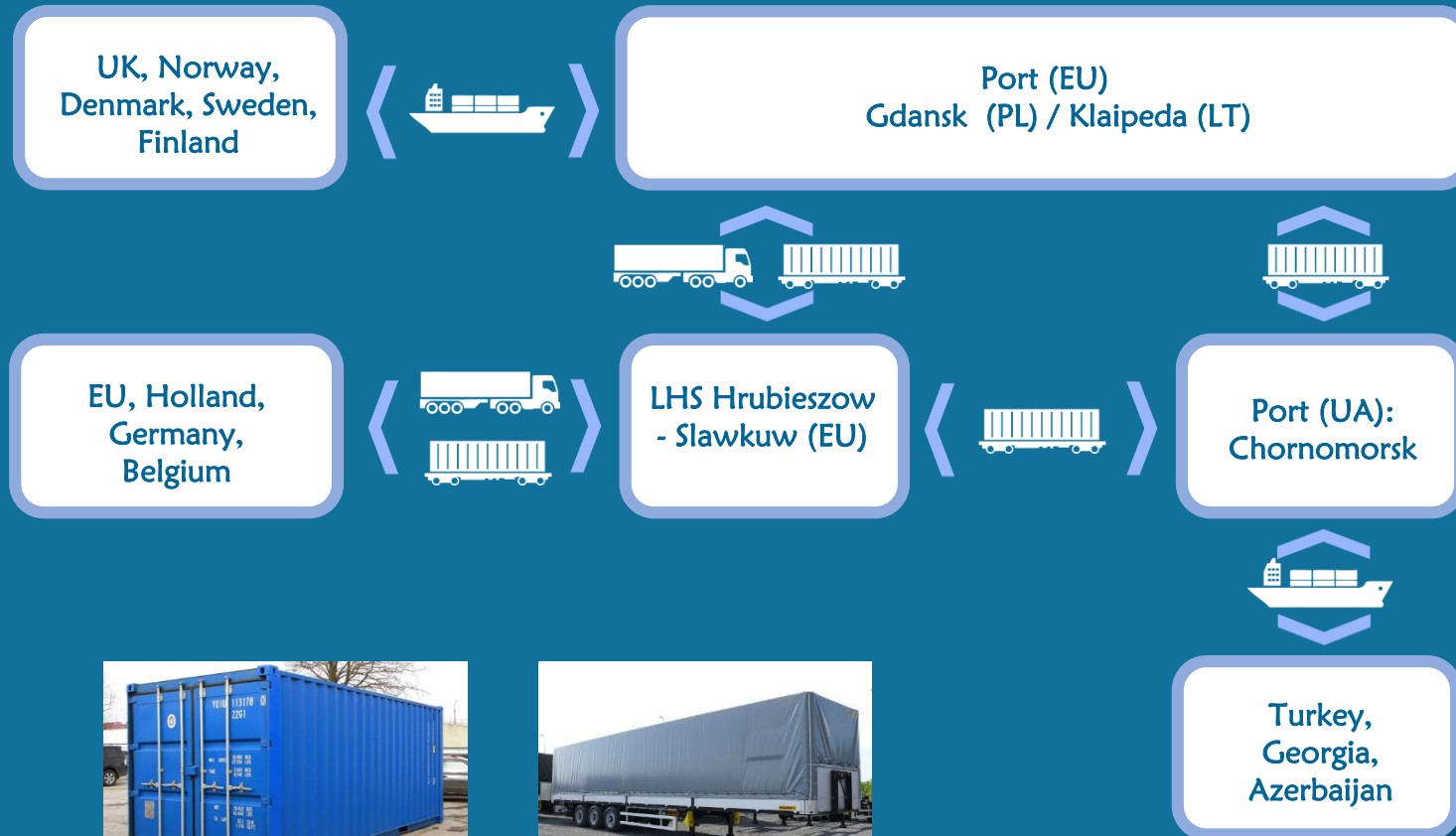


## Potential for further increase of cargo transportations using ferry service

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# Intermodal transportations connecting ports of the Baltic and the Black seas







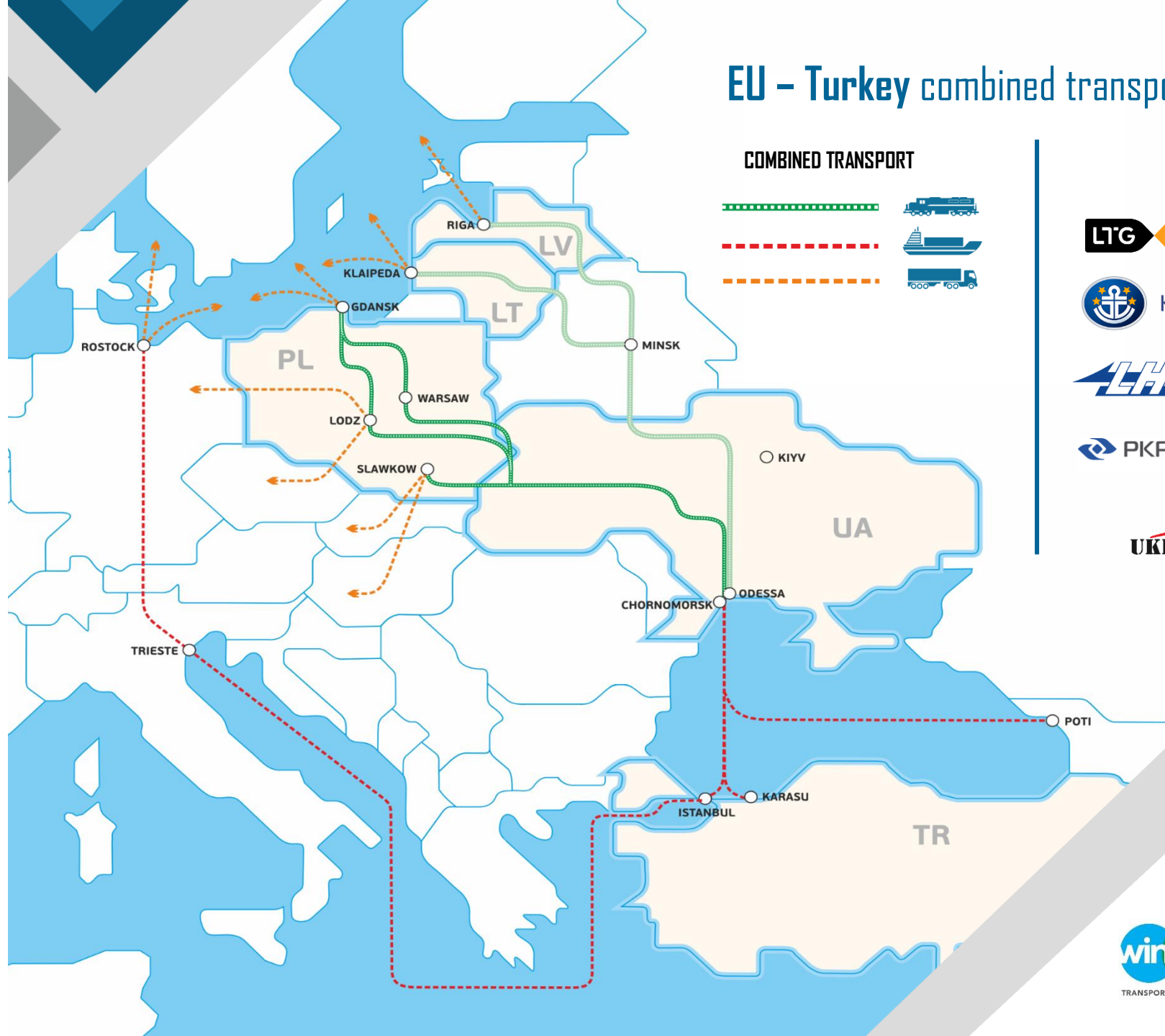
## Railway Piggyback Transportations Technology

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- No trucks
- No drivers
- Environment-friendly



# EU - Turkey combined transportation



## COMBINED TRANSPORT



## Project Participants:





## Route Operation Parameters

Port of Karasu (TR) – Chornomorsk (UA) –  
Slawkuw (PL) / Klaipeda (LT)

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- Time schedule Karasu – Chornomorsk **2 times per week**, with the fixed time and date of departure.
- **Transit Time – 24 hours.**
- Time for **terminal operations** (unloading, customs clearance, loading onto railway fitting platforms) in the port of Chornomorsk – **24 hours.**



## Route Operation Parameters

Port of Karasu (TR) – Chornomorsk (UA) –  
Slawkuw (PL) / Klaipeda (LT)

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- **Time Schedule for a block/piggyback train – 1 time per week with the fixed schedule.**

Anticipated transit time:

**Ukraine – Poland (Slawkuw) — not more than 48 hours**

**Ukraine – Lithuania (Klaipeda) — not more than 75 hours**

- **Anticipated Annual Cargo Flow for the Line at the beginning – 2000–4000 units/year.**

*40 – 80 units per week in each direction.*

## Project Participants Goals

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- To create and offer a new service for all the transport market players (Turkey, Ukraine, Poland, Lithuania, Latvia and any other stakeholders) along with the ferry service carriers and freight forwarding organizations aiming to diversify the transport services portfolio each participant used to have.
- To attract a share of the traffic realized through the road transport and containers on the route Turkey – Germany, Poland, Latvia, Lithuania - Sweden, Norway, Denmark, Finland and in the opposite direction.
- Alternative logistic solutions with the totally organized supply chain.

Thank you for attention!

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