



# IMPROVING REGIONAL MARITIME CONNECTIVITY AND REVIEWING IMPLEMENTED INITIATIVES

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# WSP Global

More than 50,000 Experts Globally

OFFICE LOCATIONS

QUICK FACTS:

130+

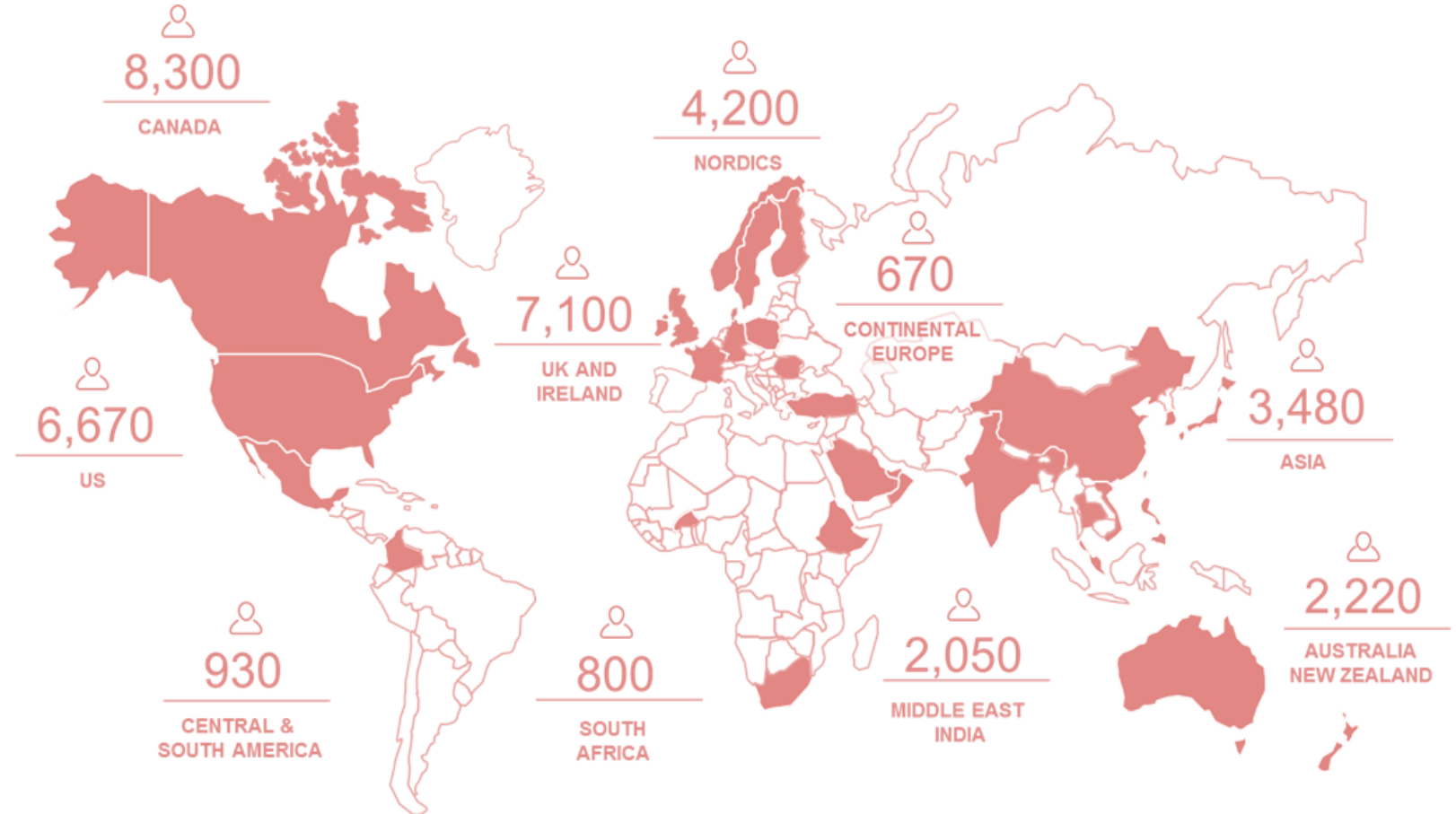
YEARS OF EXPERIENCE

250+

OFFICE LOCATIONS WORLDWIDE

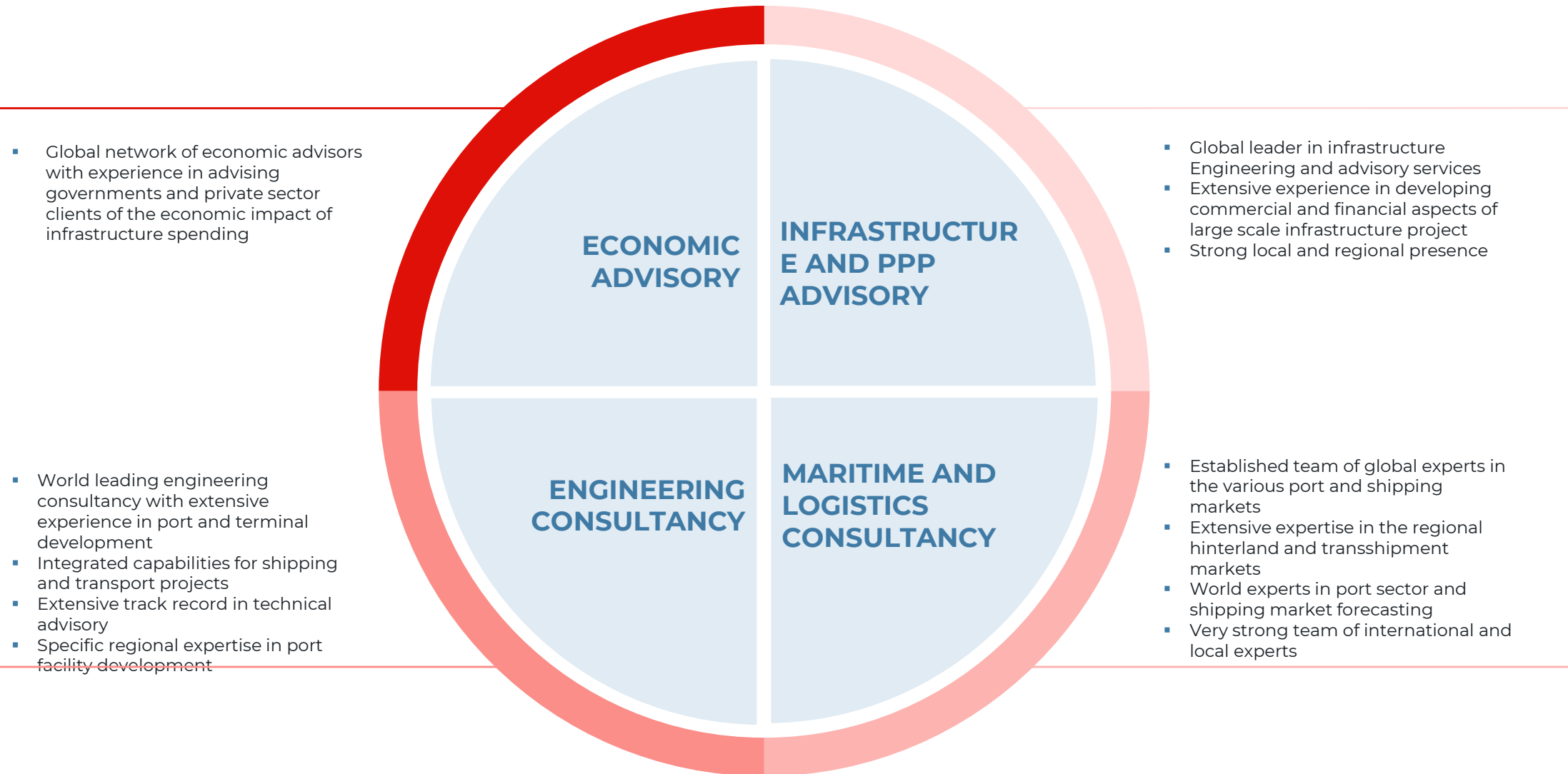
300+

MARITIME EXPERTS



# Maritime Advisory

*Global Expertise Delivered Locally*



# Main Baltic ports

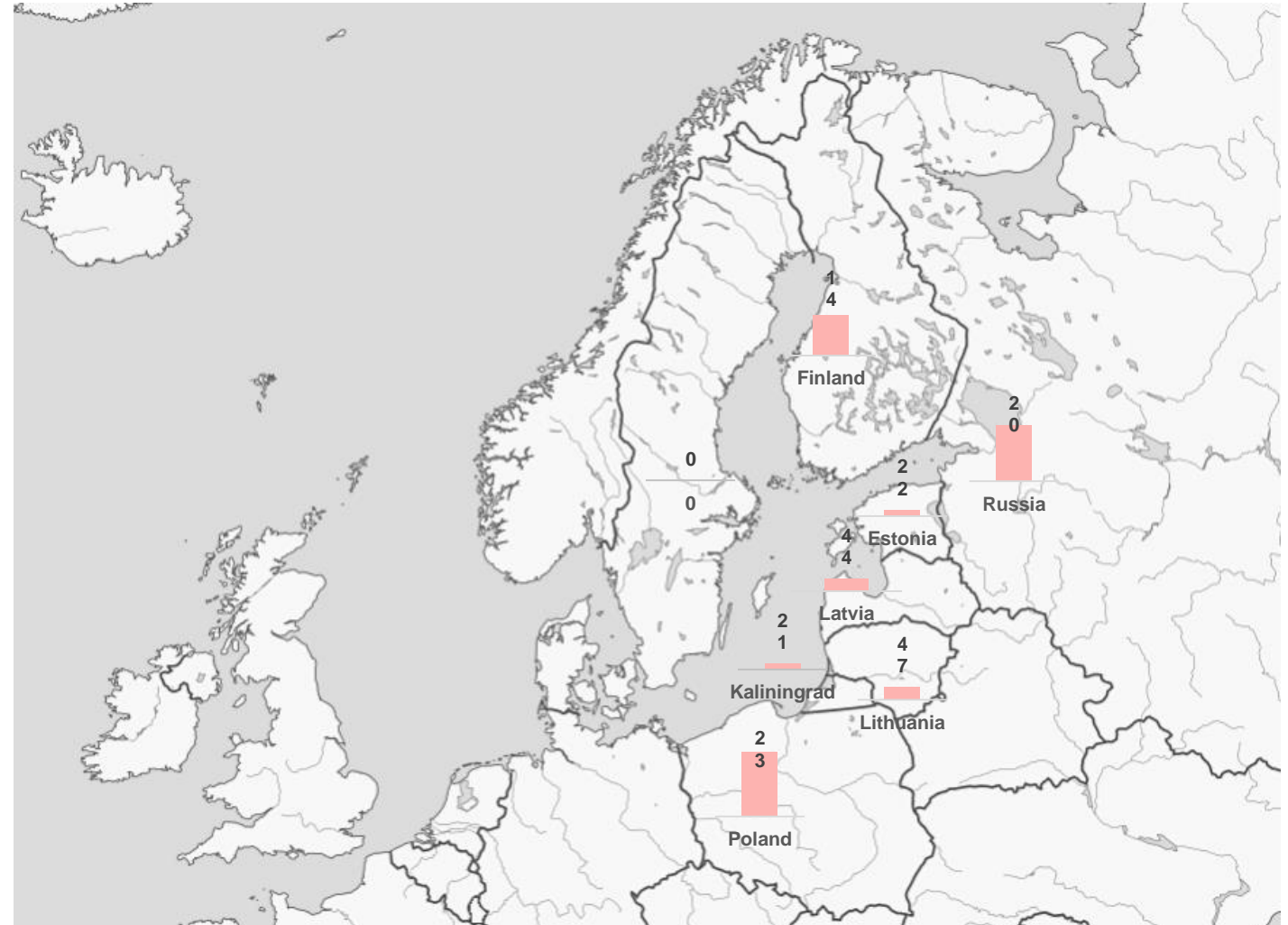
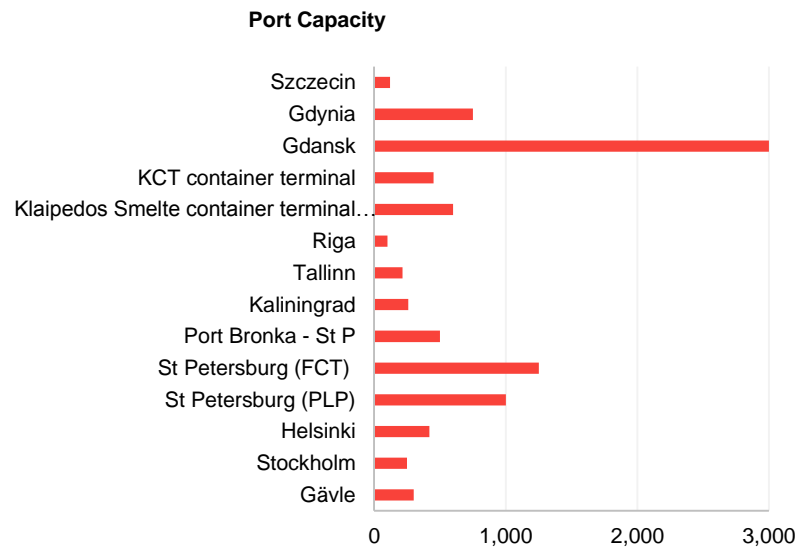
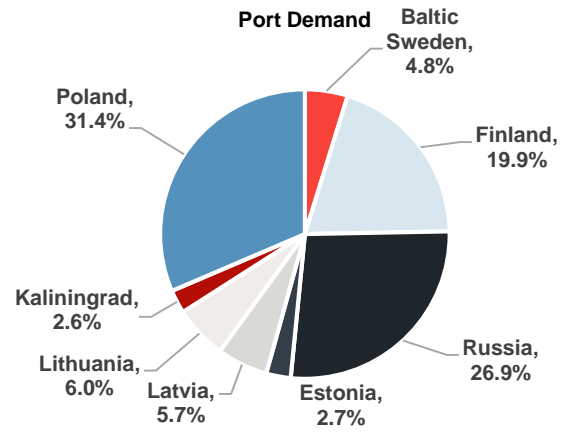
Region and Ports Under Review

5



# Total Regional Baltic Container Port Capacity

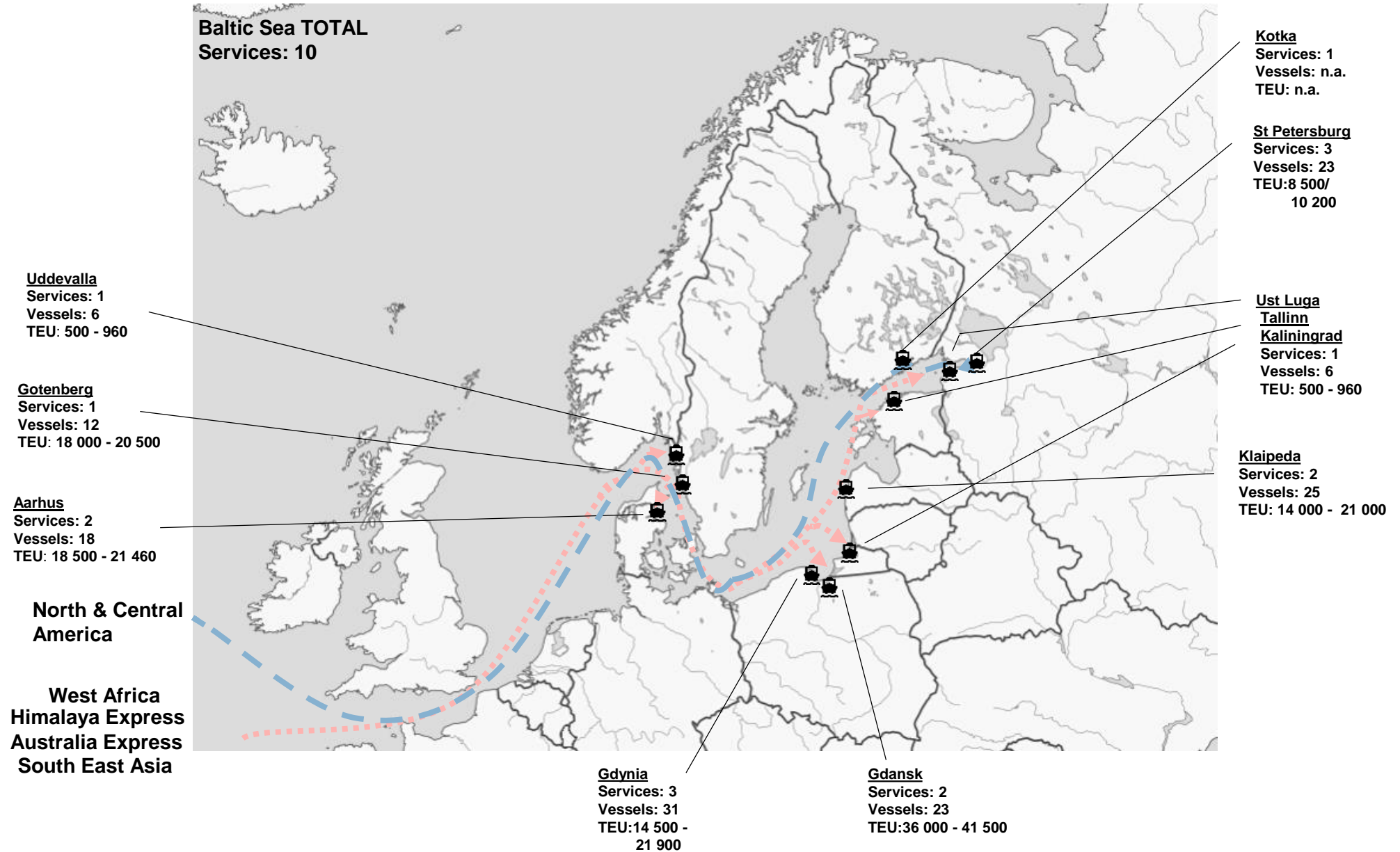
'000TEUs



# Baltic Sea Major Ports

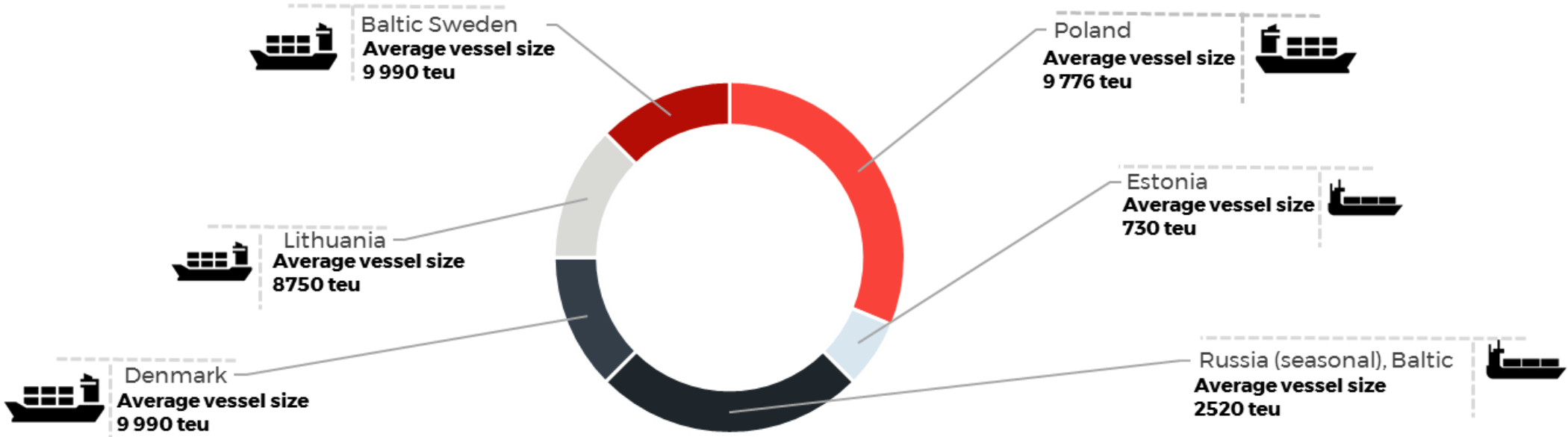
Shipping line services to the Baltic Sea Ports + vessels on route and range of TEU per vessel

7





# Vessels per Country per Week



8



# Baltic Sea Container Feeder Services


Regional sea feeder services


Operators and partnerships active: 26

- CMA CGM
- Containerships
- COSCO
- Eimskip
- Hacklin
- Hapag-Lloyd
- Langh Ship
- MacAndrews
- MacAndrews / EuroAfrica Shg Lines
- MACS
- Mann Lines
- MSC ----- Largest weekly capacity: 3 949 TEU
- Northern Shg Co
- ONE
- Samskip
- SCA Transforest
- Sea Connect
- Seago Line ----- Largest vessels: 3 600 TEU
- FESCO ESF / CMA CGM
- Shortsea Express Lines (SEL)
- Team Lines
- Thor Shipping & Transport
- Unifeeder
- Unifeeder / CMA CGM
- Unifeeder / X-Press Feeders ----- Longest rotation: 49 days
- Viasea Shipping (ColliCare)
- X-Press Feeders
- Yang Ming / COSCO

Number of services: 78

Amount of vessels: 146

 Vessel size < 1000 TEU: 56

 Vessel size > 1000 TEU: 90

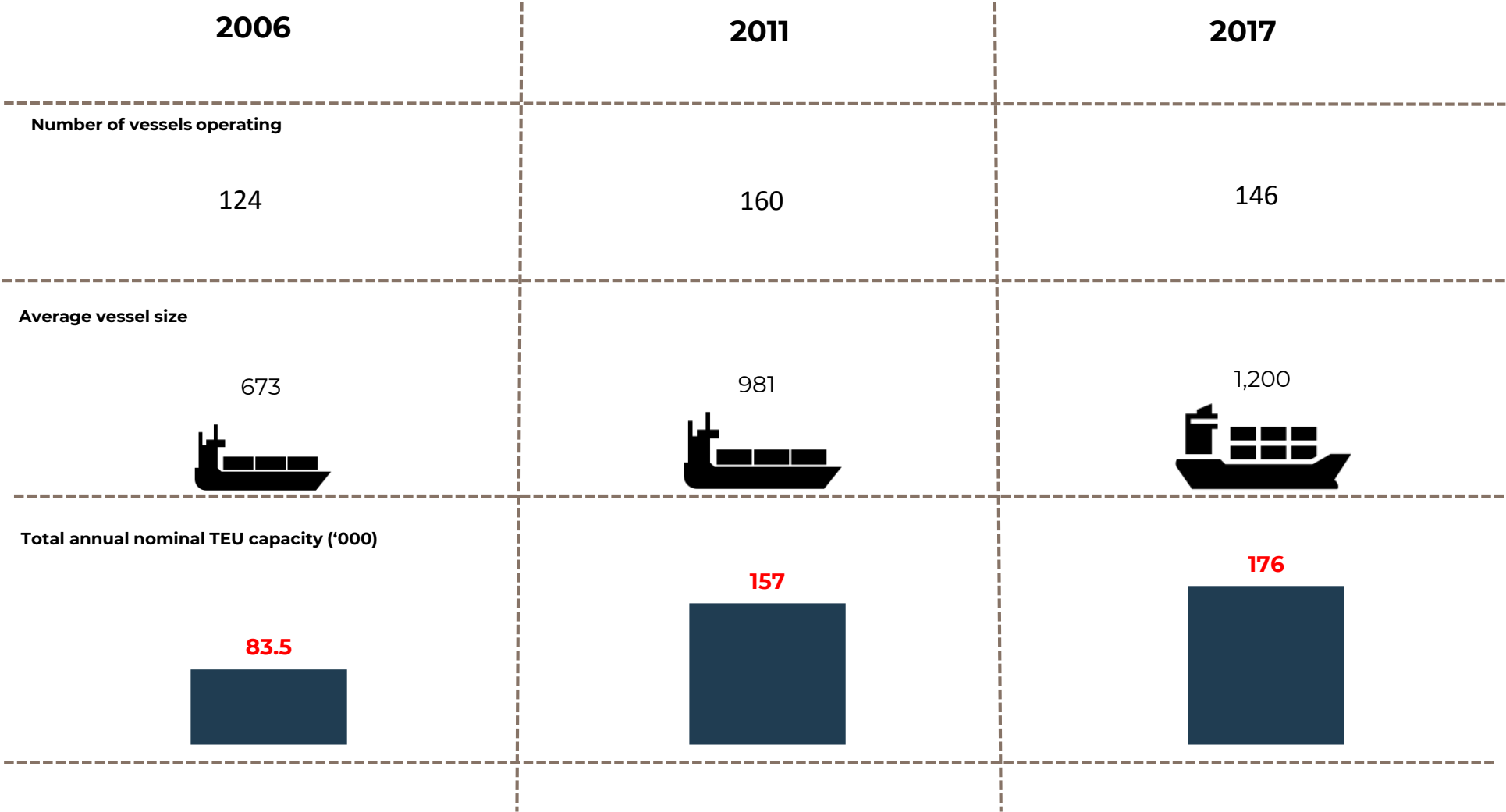
9



# Feeder Traffic Comparison

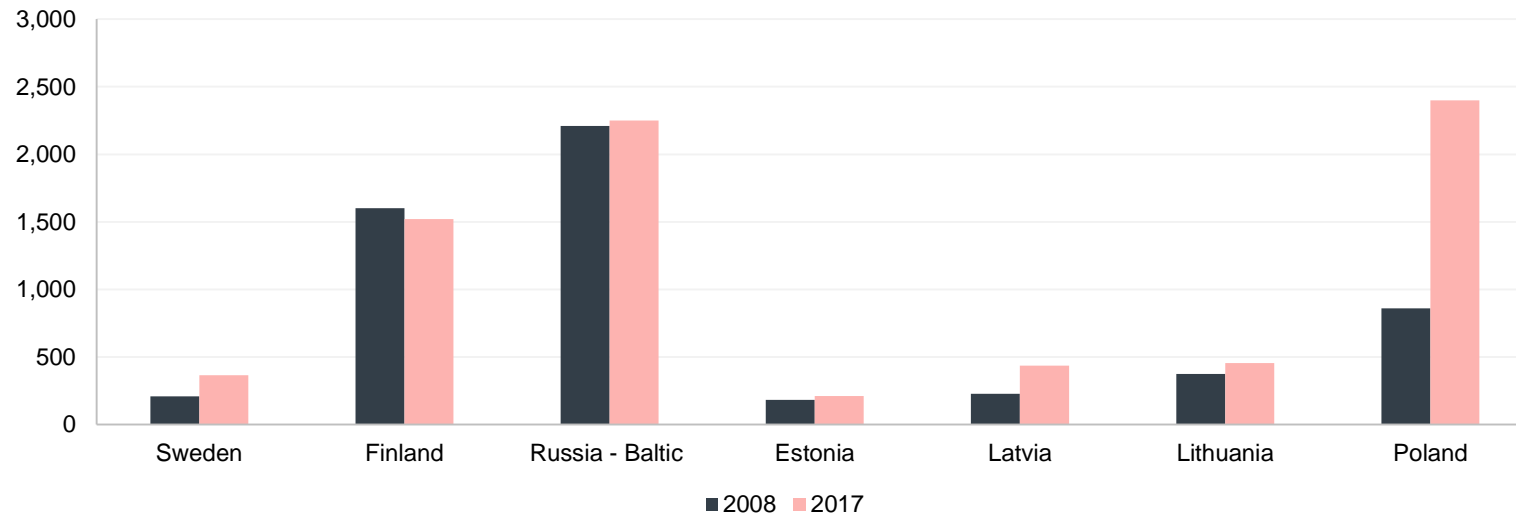
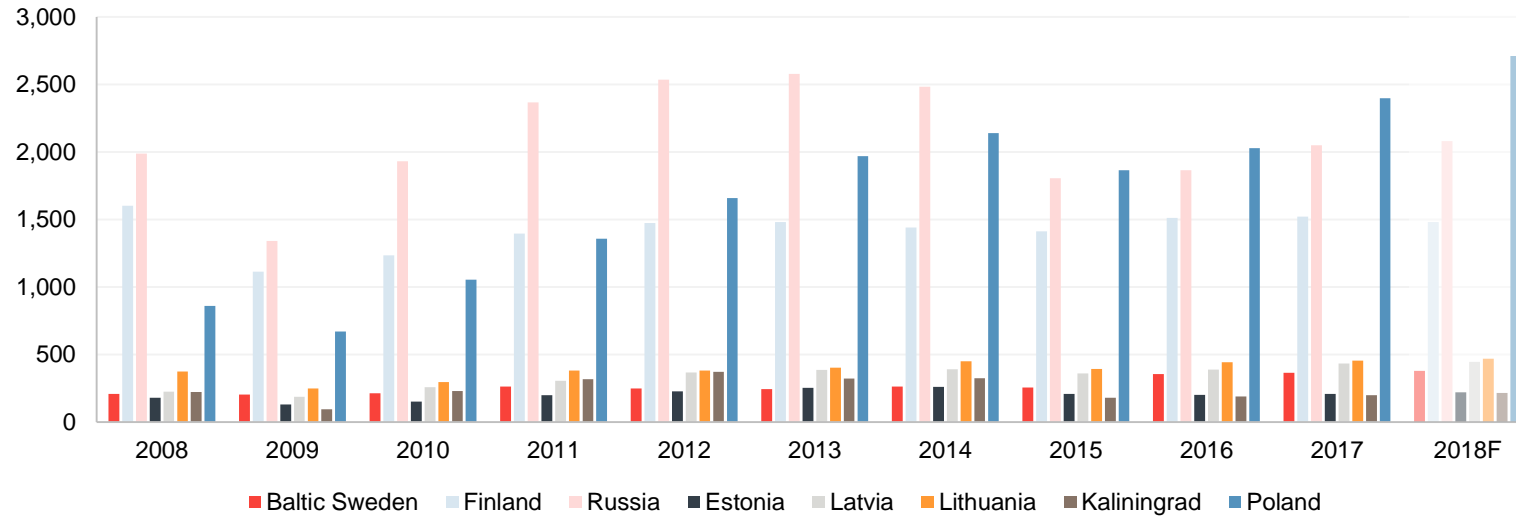
Baltic Sea feeder growth

10



# Total Regional Baltic Container Port Demand

Annual teu national demand ('000)



# Overview of Transshipment Ports and Developments in the Baltic Region

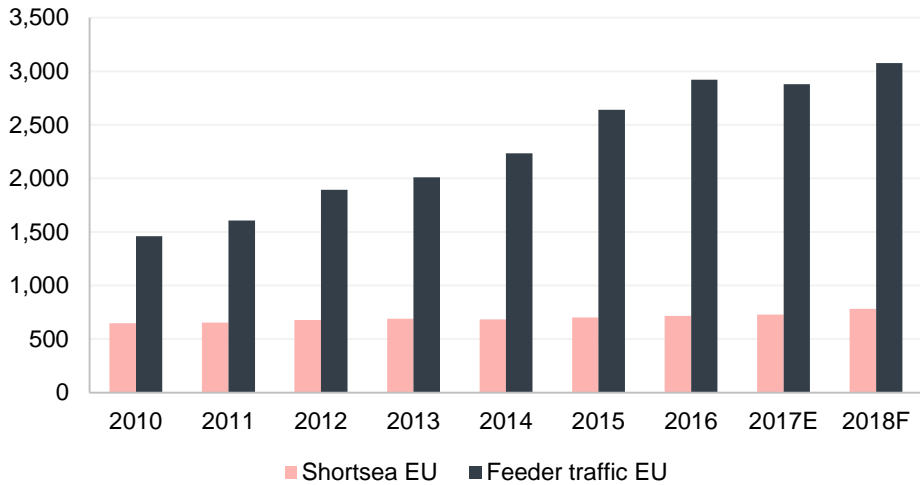
- Stockholm **Nynäshamn** to take over cargo handling from Stockholm's Frihamnen.
- **Gavle** ongoing expansion plans.
- ICTSI and HPH in **Gdynia** are planning to combine resources in order to compete with DCT Gdansk along with the deepening of the channel.
- **DCT Gdansk** expanded Terminal 2, further providing capacity for deepwater vessels. Further plans announced
- **Petrolsport CT (St.Petersburg)**, intends to upgrade the capacity by 2024 from 1.0m TEU capacity to 1.4m TEU.
- **Fehmarn Belt Fixed Link** is a planned immersed tunnel to connect the Denmark with Germany.
- **KCT (Klaipeda) Container Terminal.** to increase to 650,000 TEU to accommodate up to 8,000 TEU vessels with 13 m. draft.



# Brexit

## Baltic Ports to the United Kingdom

UK container throughput ('000 TEUs)



13

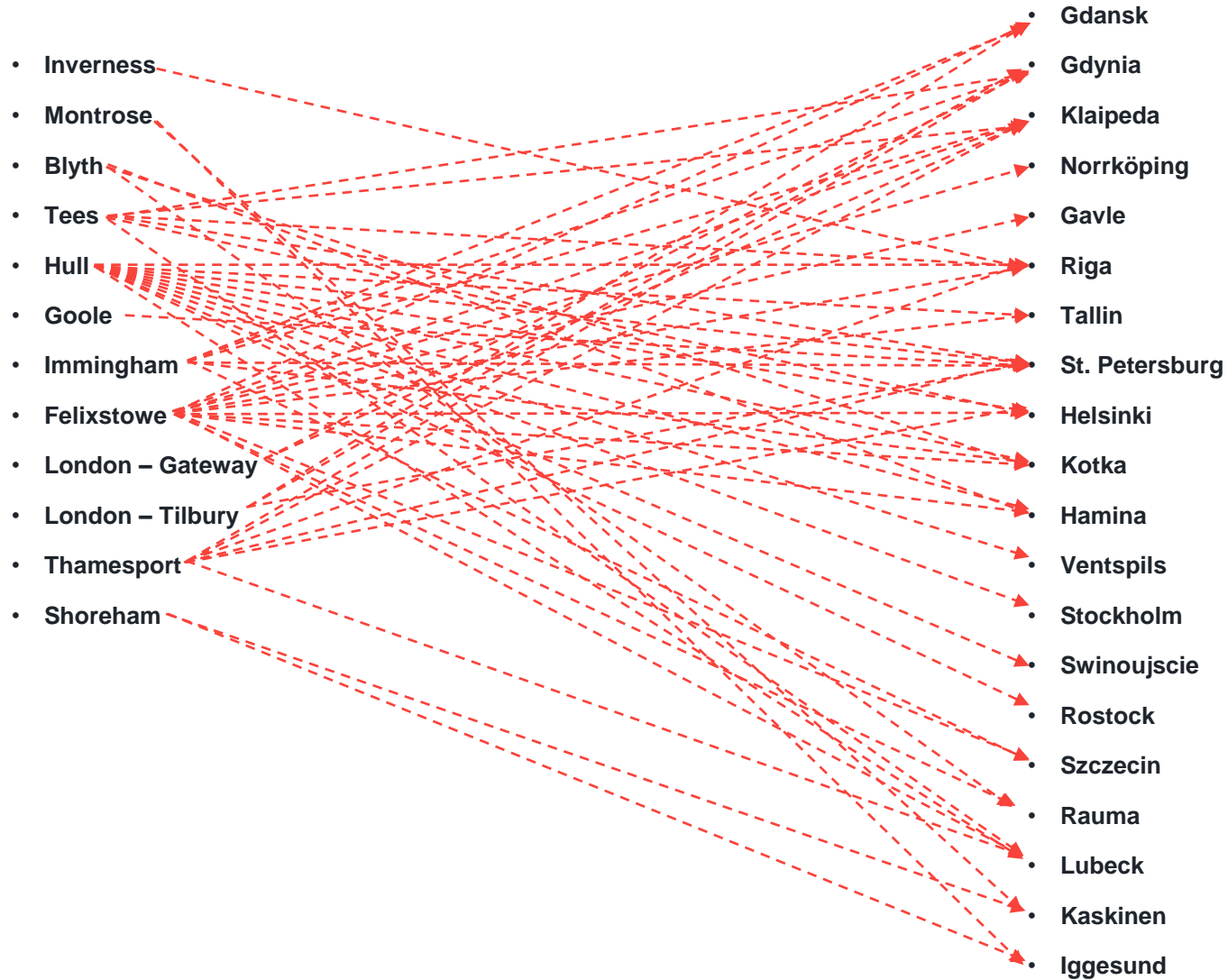
 23  
Number of Services

 100 – 21,000 TEU  
Vessel Sizes



# Brexit

## Baltic Ports to the United Kingdom





# Russian Sanctions

## Russian ports in the Baltic

### Overview:

**External** Baltic Sea traffic to Russia:  
Average vessel size: 2600 TEU  
Number of vessels per week: 5

St Petersburg's planned container expansion terminals and Maersk's new ice-classed feeder vessels route shows market demand rising.

2014 Ukraine Crimean crisis **Sanction repercussions**. Total trade dropped 29.3% from 2014 to 2015 - along with an oil crisis. The negative fall returned to positive, 3.5%, in 2015-2016 to then more than double to 9.5% the year after (2016-2017).

### Scenarios:

#### More sanctions

US provide more evidence on Russian interferences in elections and potential Russian action during November midterms elections. More sanctions levied.

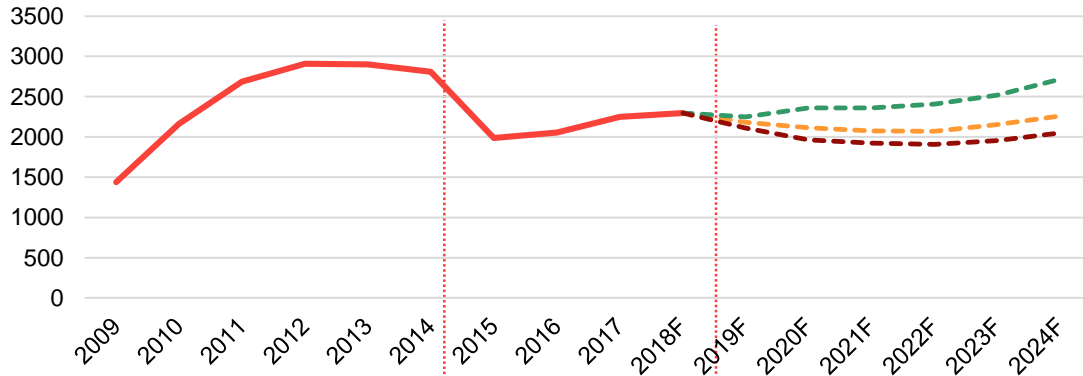
#### Continuation

Unlikely to see remorse or policy shift from Russia on Skripal poisoning. Sanctions maintained.

#### Less sanctions

European business and economies suffer under sanctions due to strong energy ties. Business lobbies politics. Sanctions decline.

Russia's Regional Baltic Container Port Demand



1st wave  
Sanctions  
introduced

2nd wave  
Sanctions  
introduced





## Summary

Shipping has changed in the Baltic Sea due to:

- Russian Sanctions and Reduced Transit
- Better Accessibility to St Petersburg
- The ongoing Labour issues in Gothenburg
- The establishment of DCT Gdansk as a regional hub

Threats for the future:

- Further reduction of trade with Russia
- Planned expansion projects may alter patterns
- Improvements in Gothenburg
- Brexit

THANK YOU

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