



**“Enhancing
competitiveness and
exploring current
opportunities in the Black
Sea economy”**

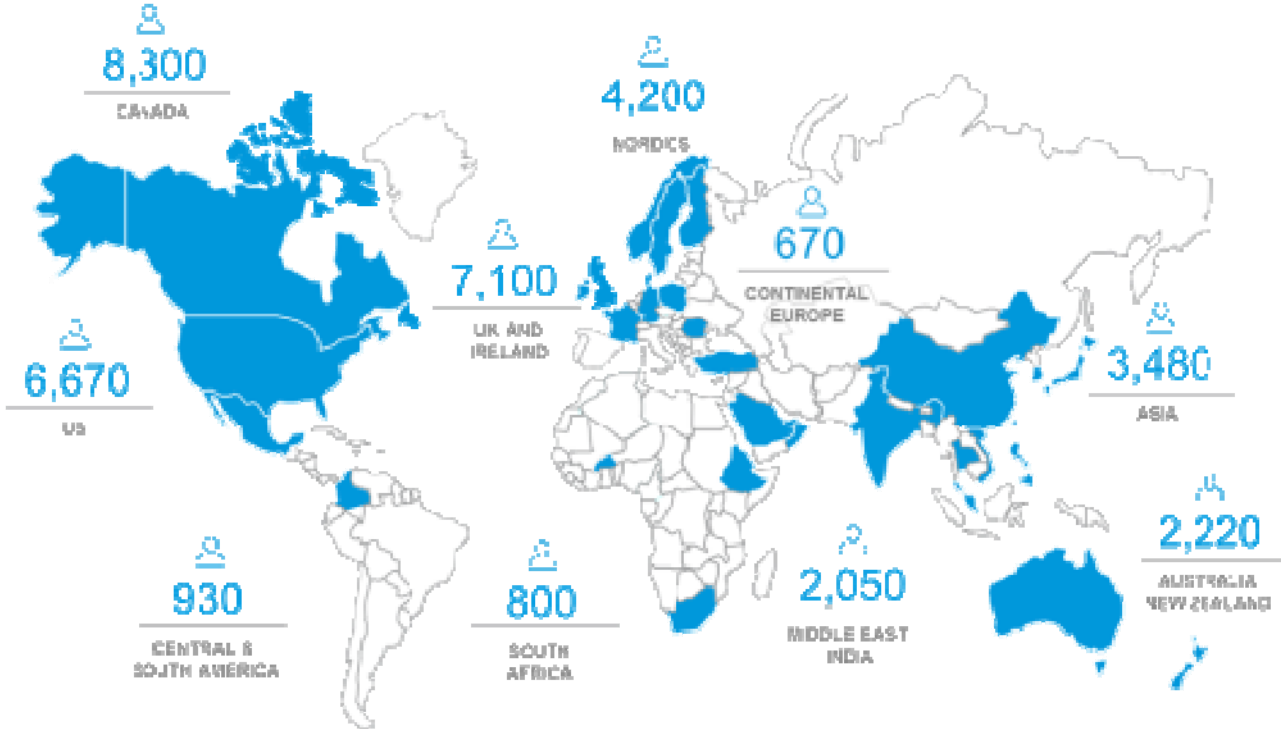
*Roy Van Eijdsen
Director*

Maritime Advisory

*6th Black Sea Ports &
Shipping 2017 Exhibition
and Conference, May 2017*

WSP BACKGROUND

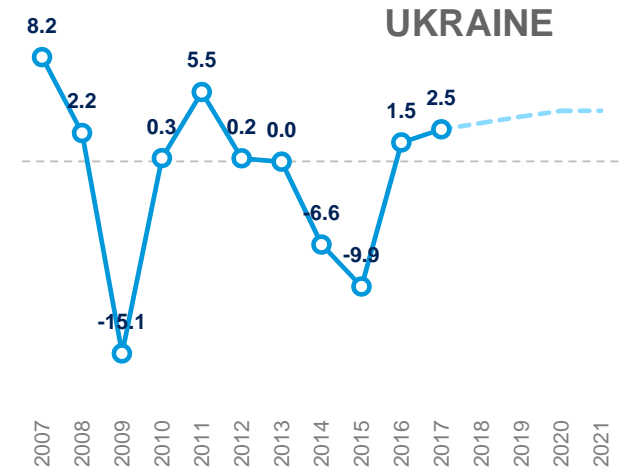
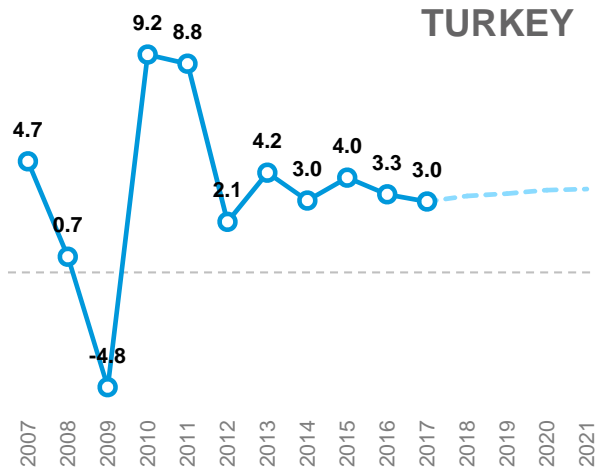
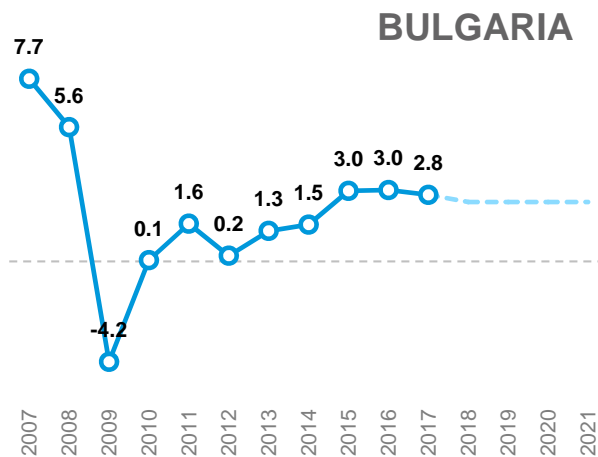
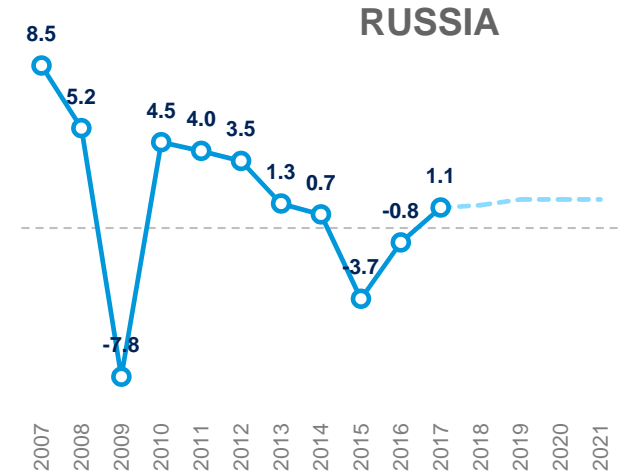
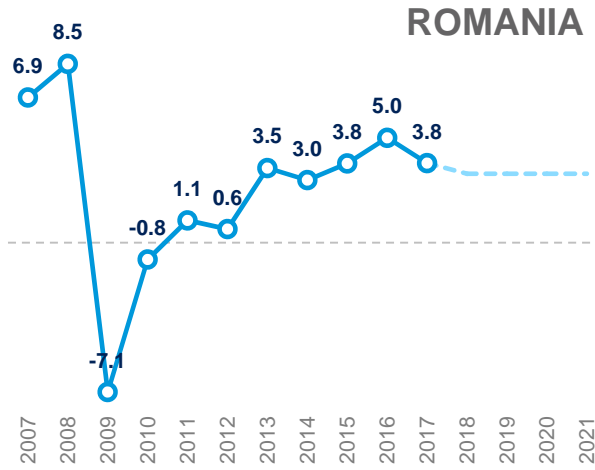
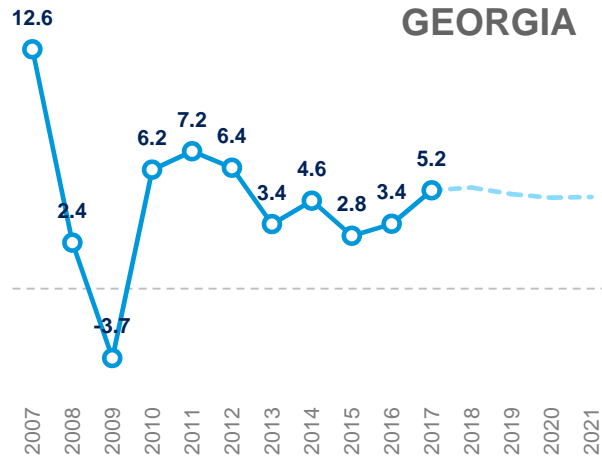
WSP Parsons Brinckerhoff has changed its name to WSP in May 2017



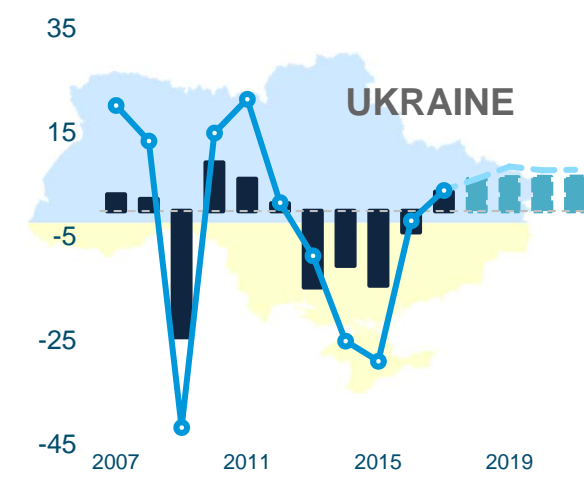
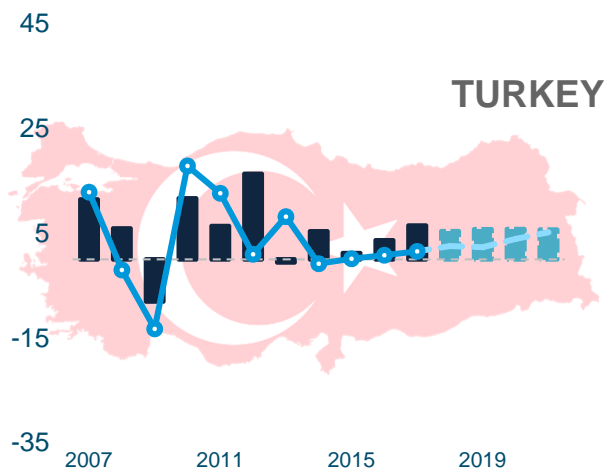
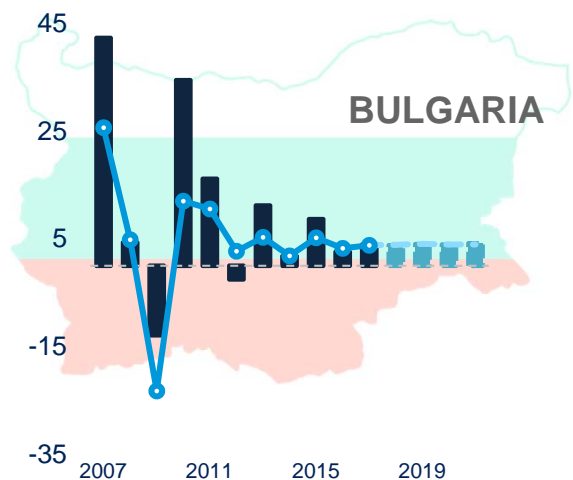
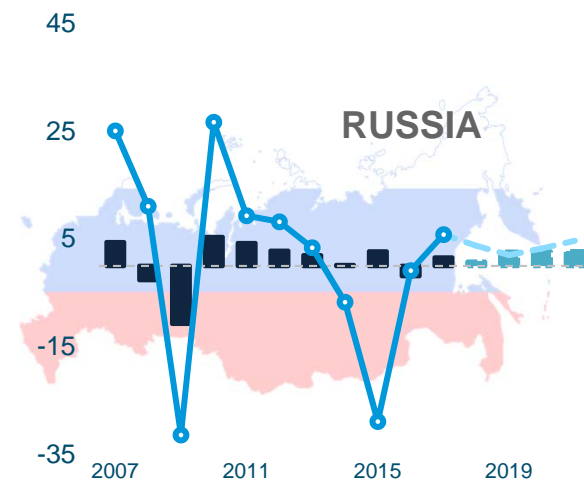
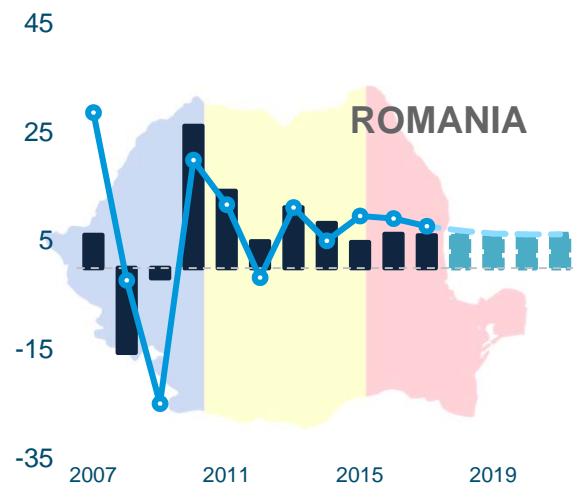
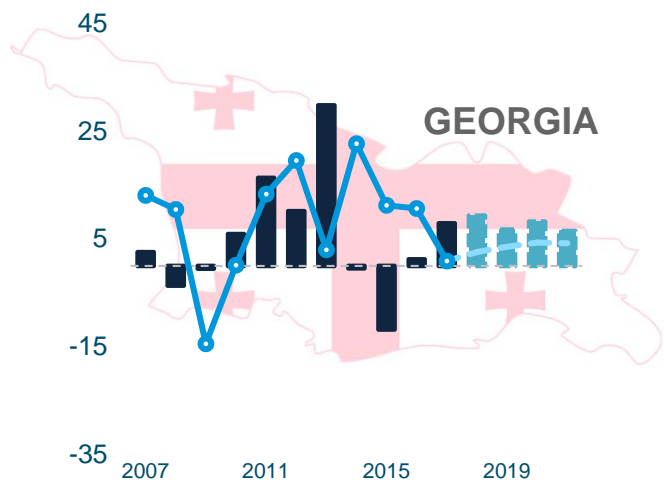
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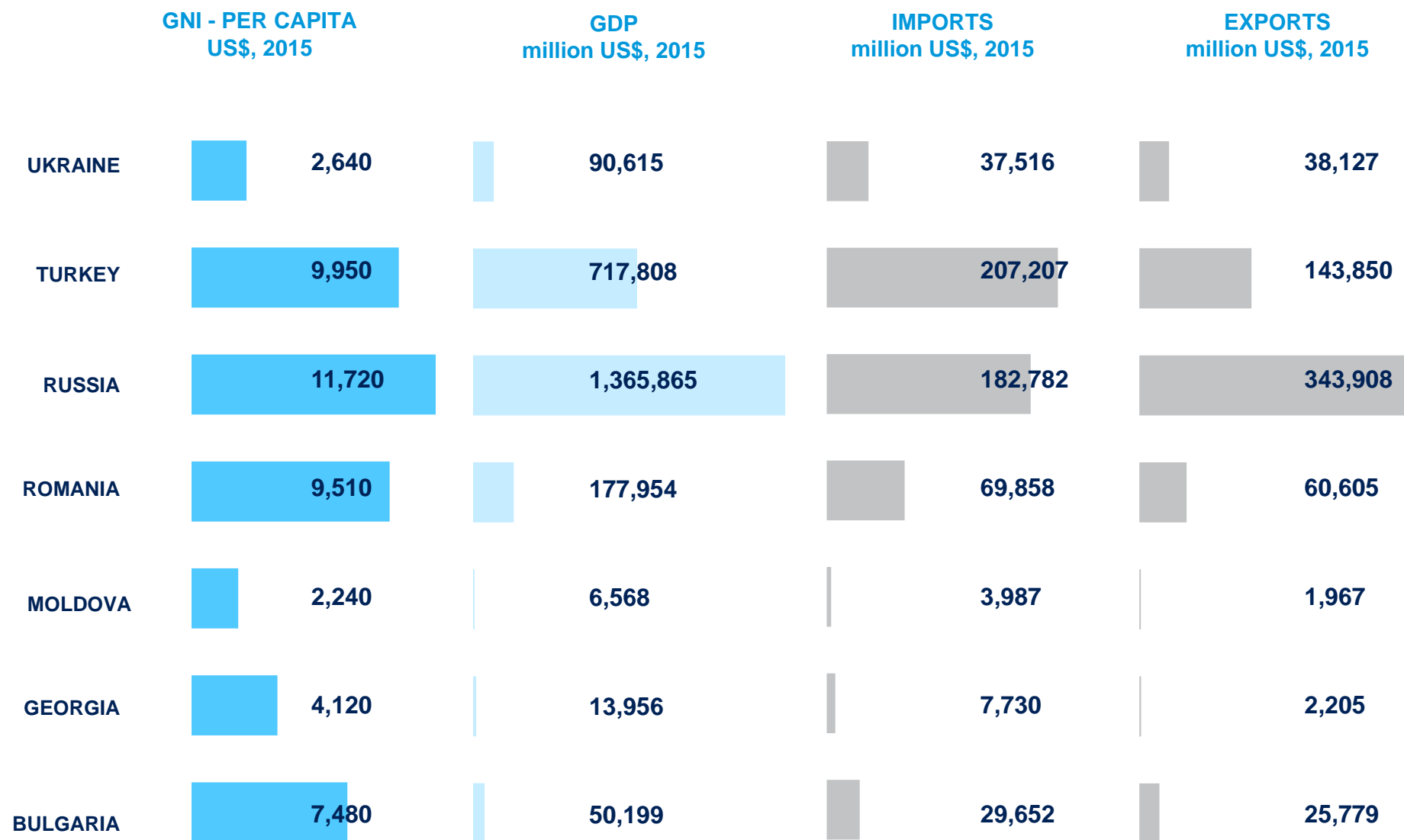
I - GDP, (CONSTANT PRICES) – ANNUAL % CHANGE AND FORECAST



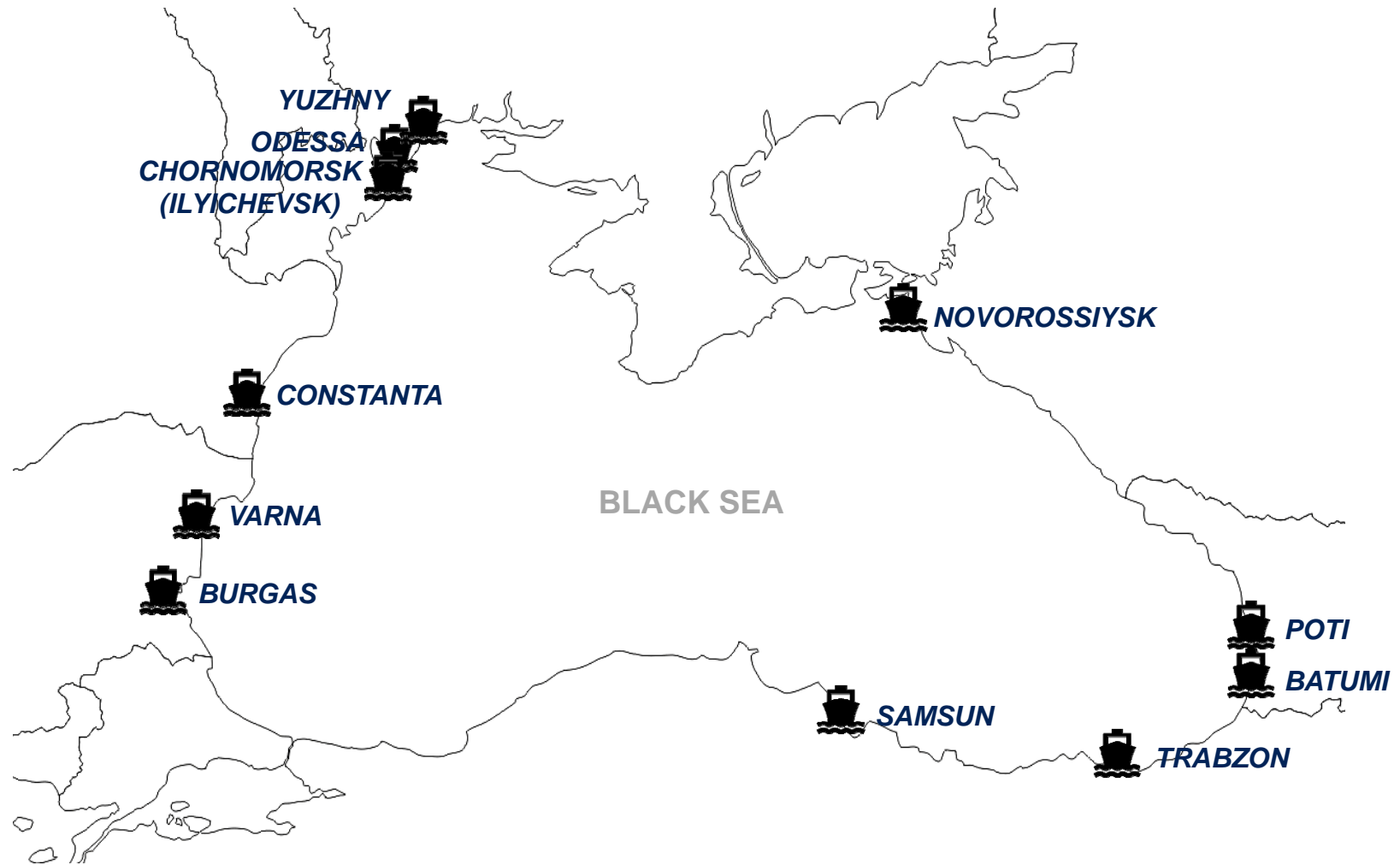
II – IMPORT & EXPORT – ANNUAL % CHANGE



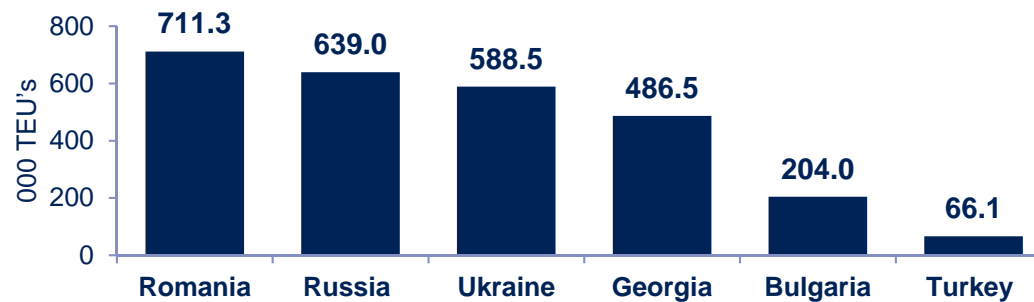
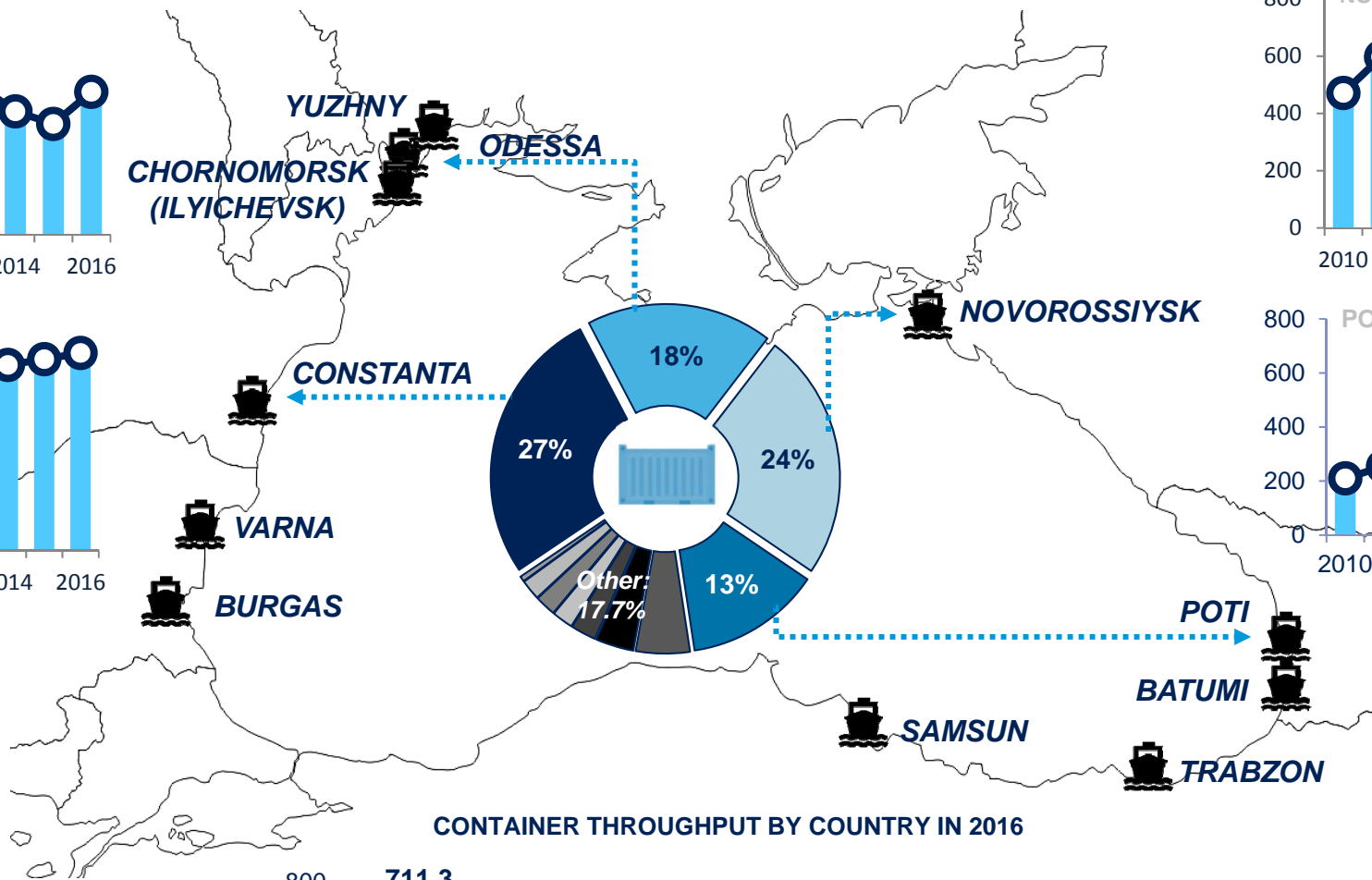
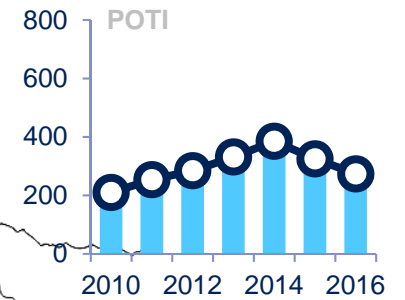
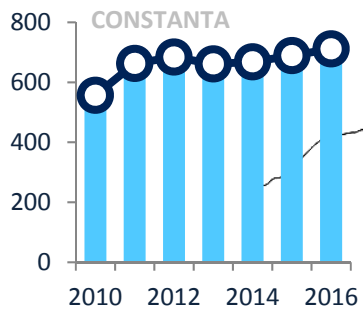
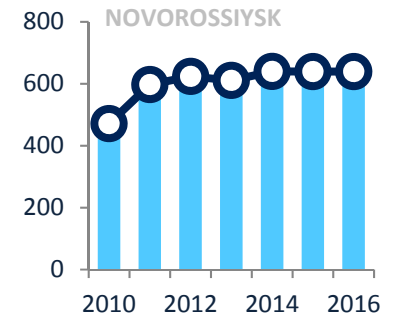
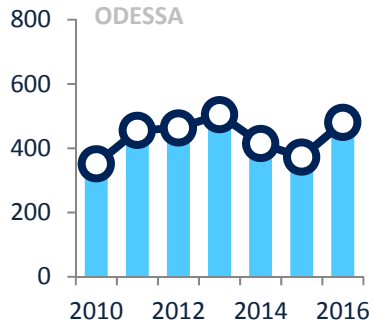
III – KEY ECONOMIC INDICATORS IN BLACK SEA REGION



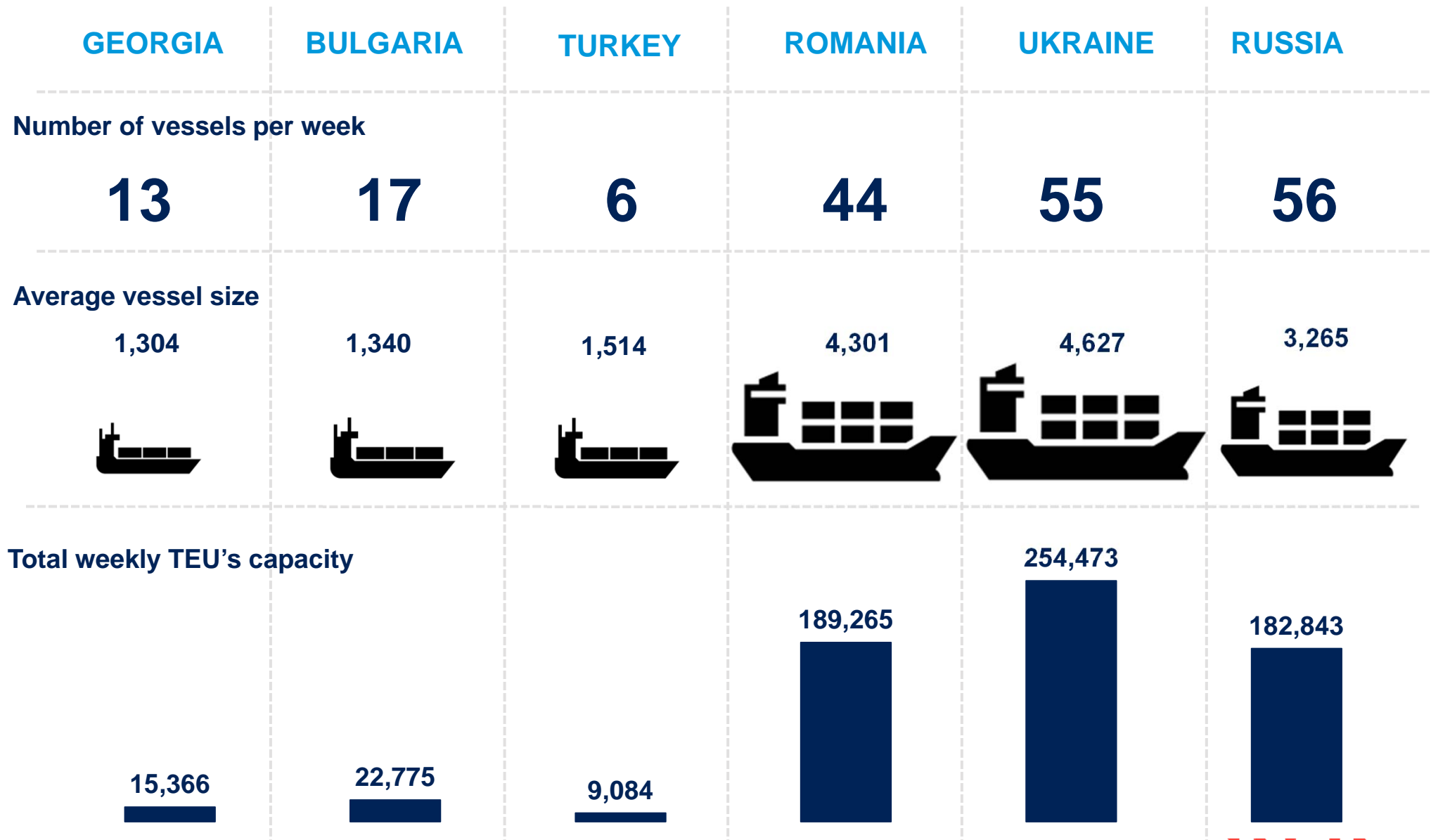
IV – KEY PORTS IN BLACK SEA REGION



V – CONTAINER VOLUMES IN BLACK SEA REGION, (000 TEU'S)



VI – CONTAINERSHIPS SERVICES OVERVIEW IN BLACK SEA PORTS



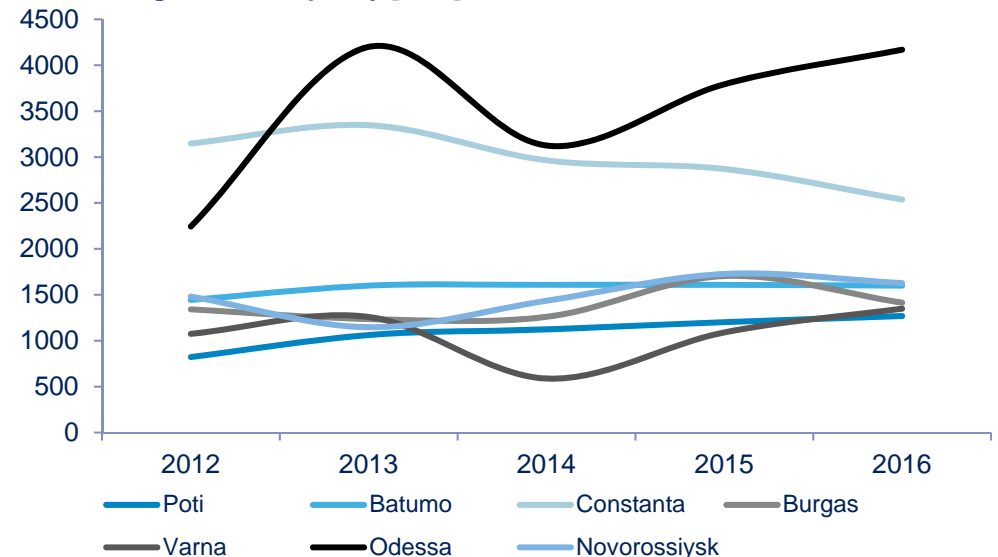
Source: Alphaliner, 2017 May



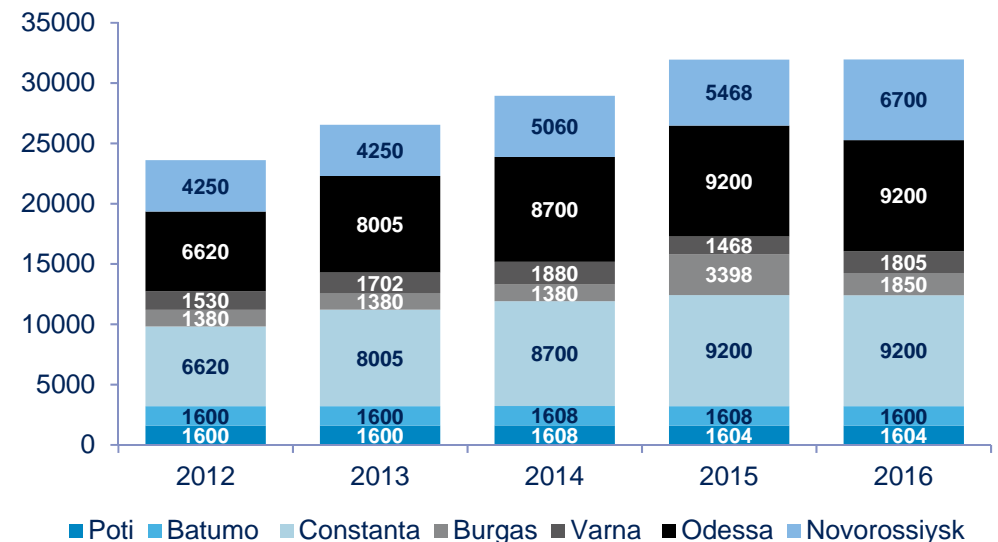
VII – CONTAINERSHIPS SERVICES OVERVIEW IN BLACK SEA PORTS

- Ports with sufficient water depth and facilities available have seen the average and maximum vessel size deployed by liner companies increase. Other ports have stagnated around feeder vessel types.
- Terminal productivity has increased – but there remain a need for further improvements
- Need for dredging – approach channels and berths. Clear planning needed for all terminal developments. Depth alongside is critical to ‘future-proof’ terminals.
- Longer berths; larger terminal area; increased gate pressure
- Larger/Havier Quay Cranes - Longer reach; Taller clearance; Twin/Tandem Lifts
- Increase in load on quay structures and increase in electrical loads and electrical infrastructure
- Black Sea ports will need to improve their productivity and efficiency to convince lines to return. Bigger vessels call at fewer ports and need to be turned quickly.
- New deepwater facilities will be attractive as alternatives to E.Med t/s hubs.
- Terminals which do not lift productivity will see market share decline

Average vessel capacity [TEU]



Maximum vessel capacity calling [TEU]



Source: Alphaliner, 2017 May



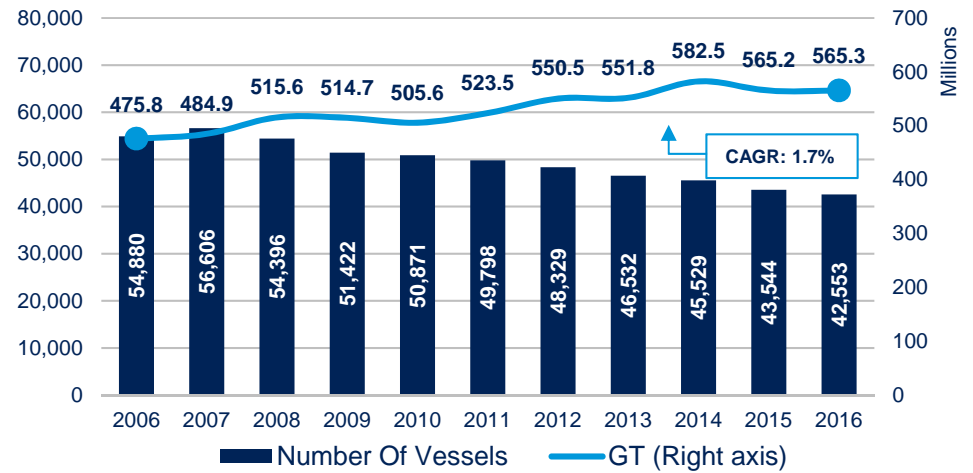
VIII - BOSPORUS STRAIT – PASSING VESSELS REVIEW

Restrictions regarding transit through the straits apply to both the Dardanelles and the Bosphorus Strait.

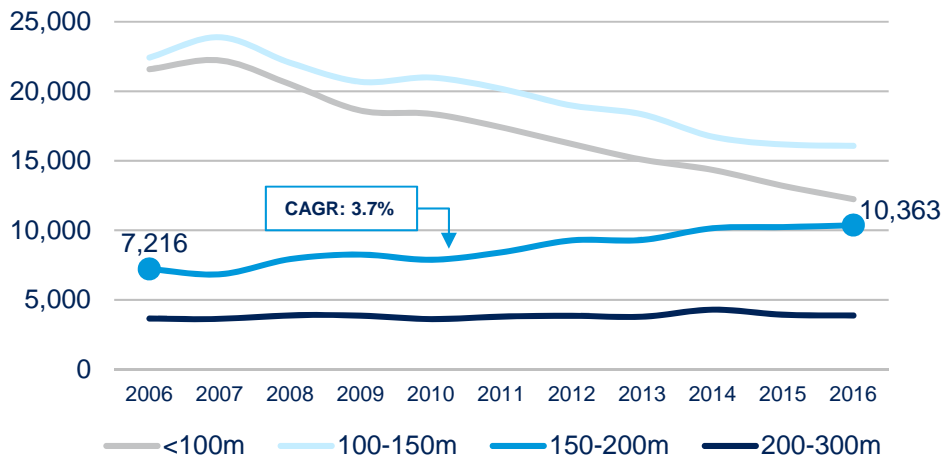
- Maximum air draft: 58m (only for Bosphorus);
- Maximum vessel draft: 20m;
- Maximum length(without special permission): 299.99m;
- Special permission can be given for vessels exceeding 300m;
- Only daylight navigation is allowed then in the straits;
- Air draft limitations set the additional limit in the Bosphorus.

=> Istanbul Canal?

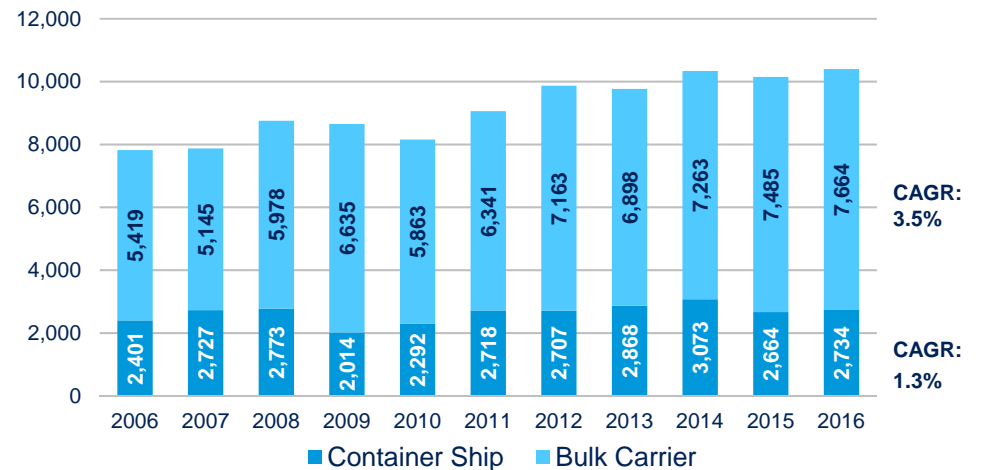
Number of vessels passing through the Bosphorus strait



Number of vessels passing through Bosphorus strait by vessel length



Container and Bulk vessels passing through the Bosphorus strait



XI - CONCLUSIONS

- There will be pressure to handle much larger vessels on all deepsea trades.
- These vessels and larger consignment sizes will see the need for longer quays with improved access and larger (and heavier) cranes.
- New deepwater facilities in Black Sea region to some attract mainline/secondary trade services.
- Some opportunity for Black Sea transshipment hub to compete with East Med.
- Although Black Sea region likely to still be served via feeder vessels, these vessels are likely to be bigger feeders.
- New investments in the Black Sea Area:
 - DP World
 - Hutchison
 - Anaklia
 - Upgrading of existing facilities

Major Game Changers:

- Alliance Developments
- Changing Vessel mix
- Increased transit through Iran to Caspian Sea States
- Bosphorus Canal
- Ukraine momentum
- Russia-Turkey improved relations

THANK YOU

ROY VAN EIJDEN

Director

WSP Group Africa

 **+44(0) 7980 687346**

 **+44(0) 7980 687346**

 **Roy.VanEijdsen@wspgroup.com**

 **WSP House, 70 Chancery Lane
London, WC2A 1AF**

