

# 8th Black Sea Ports and Shipping Conference

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# Agenda



A

Introduction  
to Roland  
Berger



B

Global  
maritime  
trends



C

Regional trade  
and maritime  
trends



D

BRI  
developments



E

Some  
suggestions



## **A. Introduction to Roland Berger**

# Founded in 1967, Roland Berger is a leading global strategy firm with successful operations in all major international markets

## Our global presence

**50** offices in **34** countries, with approx. **2,400** employees

Over **220** partners with specific expertise organized in **14** competence centers

Serving over **1,000** international clients

## Clients

**75%** repeat clients

**40%** of top 1,000 global companies

**50%** of Europe's leading companies



[www.rolandberger.com](http://www.rolandberger.com)

# We have deep experience and expertise in supporting ports, terminal operators and maritime sector development globally

Selected Roland Berger clients in ports/terminals and shipping

## Ports/terminals



## Shipping



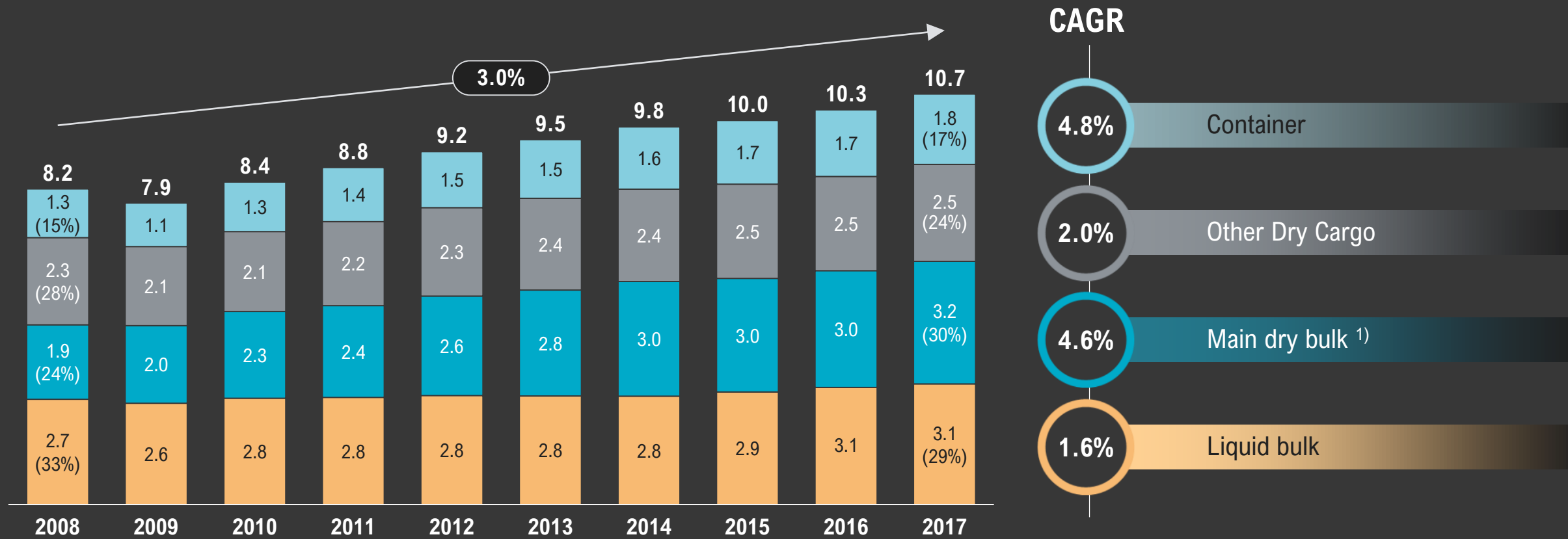
-  We are proud to be a **top 5** player in the **global strategy consulting market**
-  We have **deep global port/terminal planning and development experience** and **extensive expertise** in related **business/ operational topics**
-  We have a **Global Maritime Practice**



## B. Global maritime trends

# During the last decade, global maritime trade has grown slower than in the past – main growth is coming from containers and dry bulk

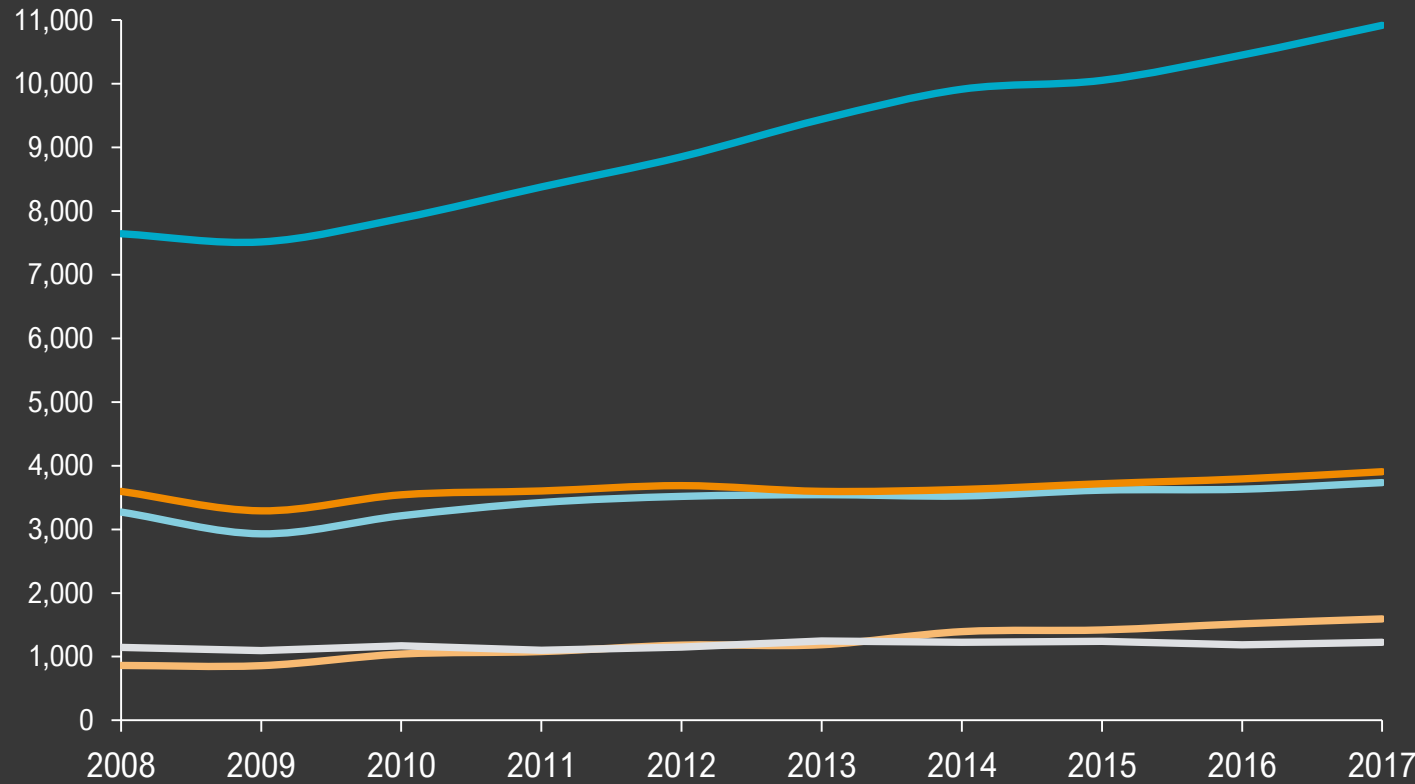
International seaborne trade [bn tonnes loaded]



1) Main dry bulk: iron ore, grains, coal, bauxite/alumina, phosphate

# In terms of regions, growth is now mainly driven by Asia

Global maritime trade [2008-2017, MT m]



**% of Total**  
[2017]

**CAGR**  
['08-'17]

51.1 %

3.6%

Asia

17.5 %

1.3%

Europe

18.3 %

0.8%

America

7.5%

6.4%

Oceania

5.7%

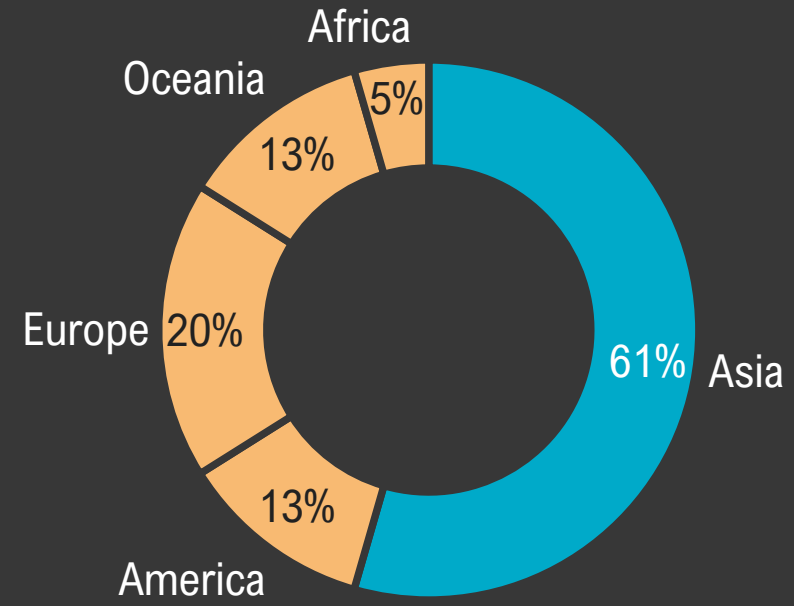
0.7%

Africa



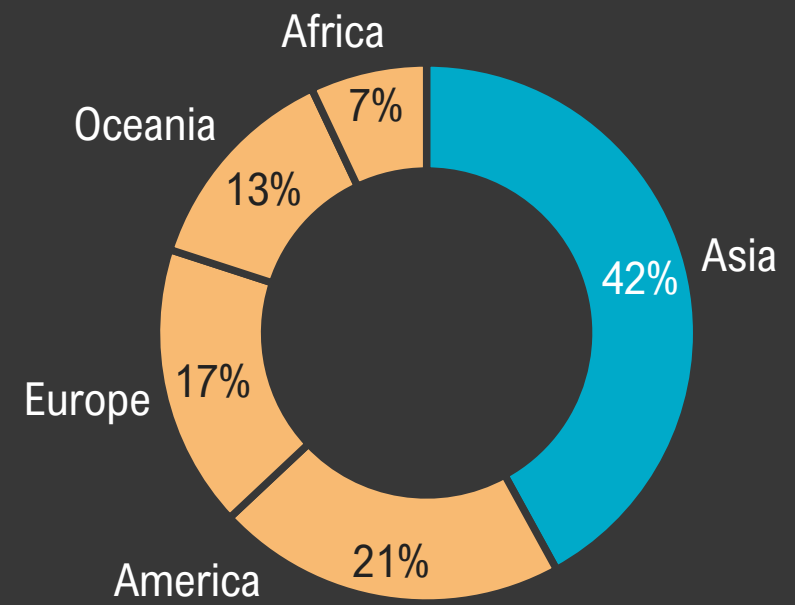
# Asia now accounts for >50% of maritime trade in terms of tonnage

Share of world tonnage [2017]



## Imports

Imports in Asia mainly driven by bulk cargo

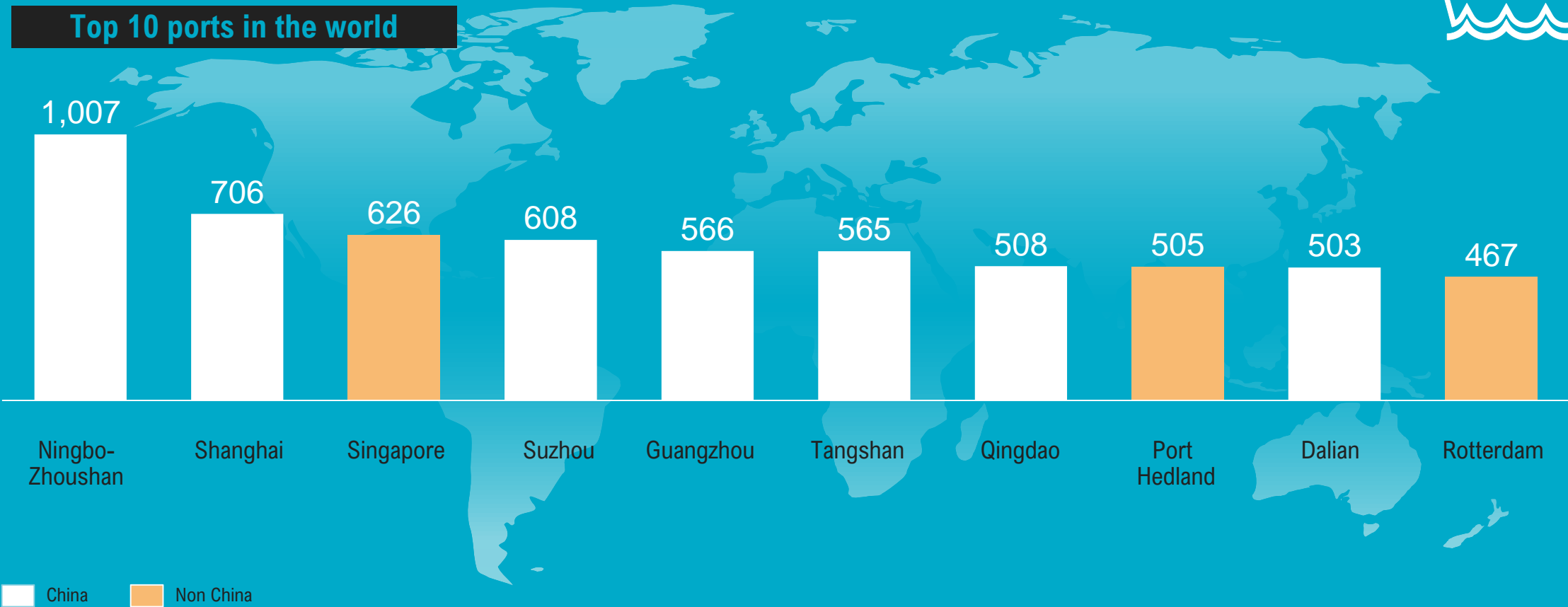
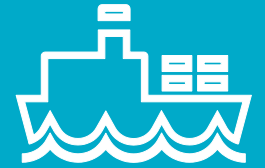


## Exports

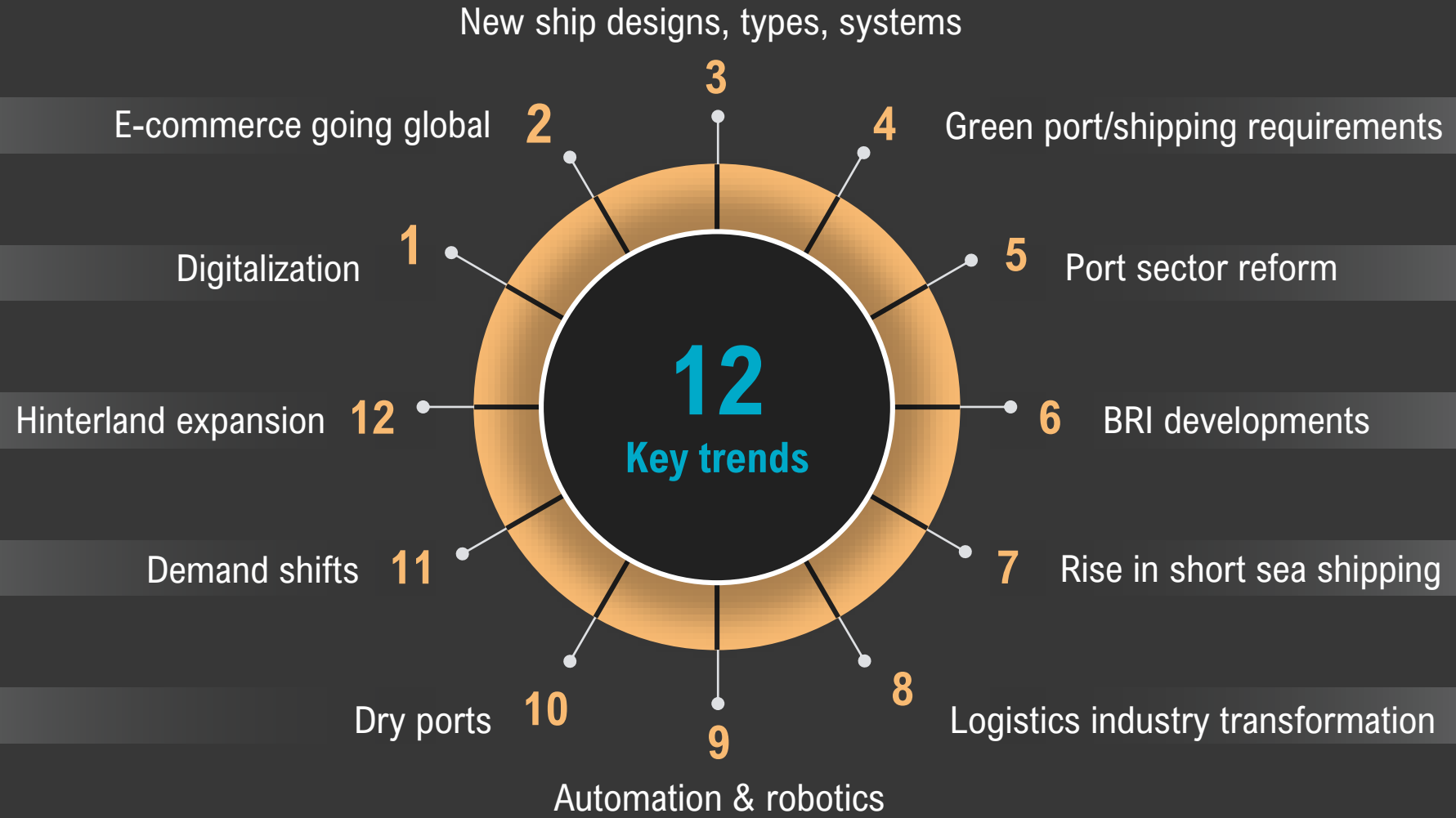
Exports from Asia mainly driven by consumer products

# Seven of the ten largest ports in the world are now located in China

Total cargo throughput [2017, MT m]

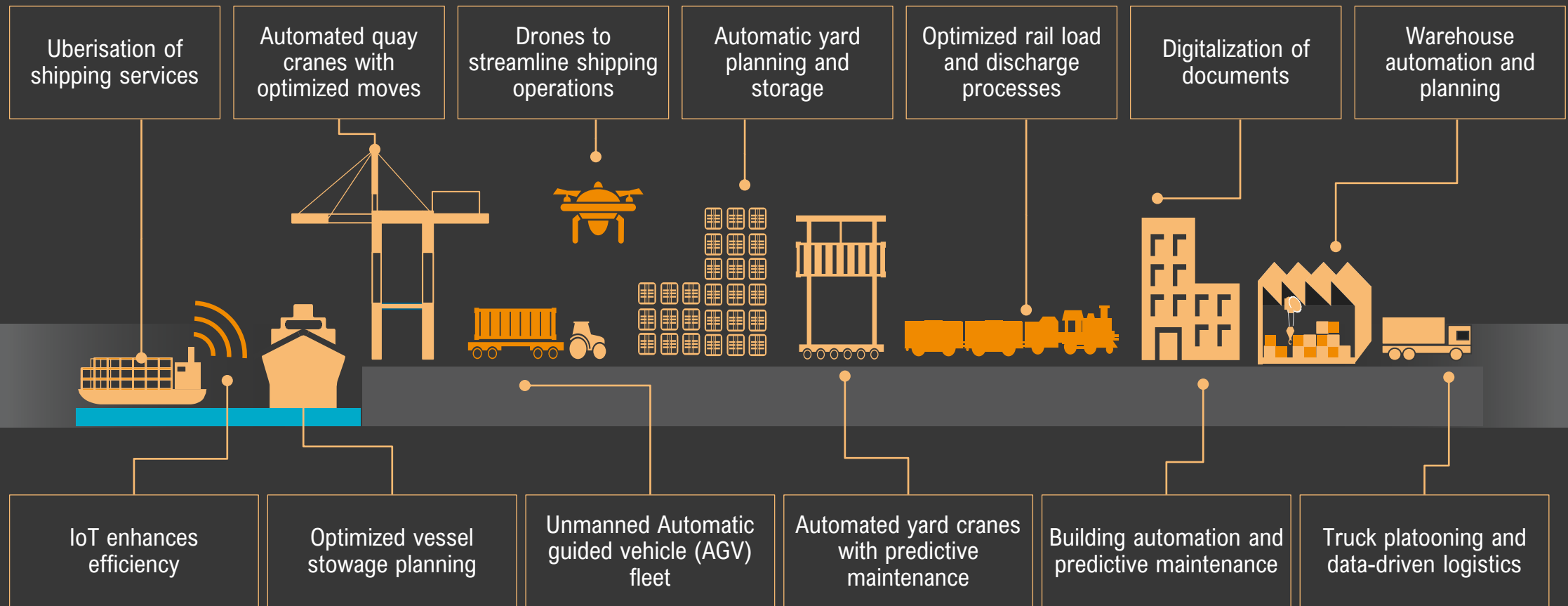


# We see 12 megatrends that are challenging the maritime industry today



# New digital technologies are affecting all port operations, improving efficiencies and bringing new challenges

## Digital technologies and port operations

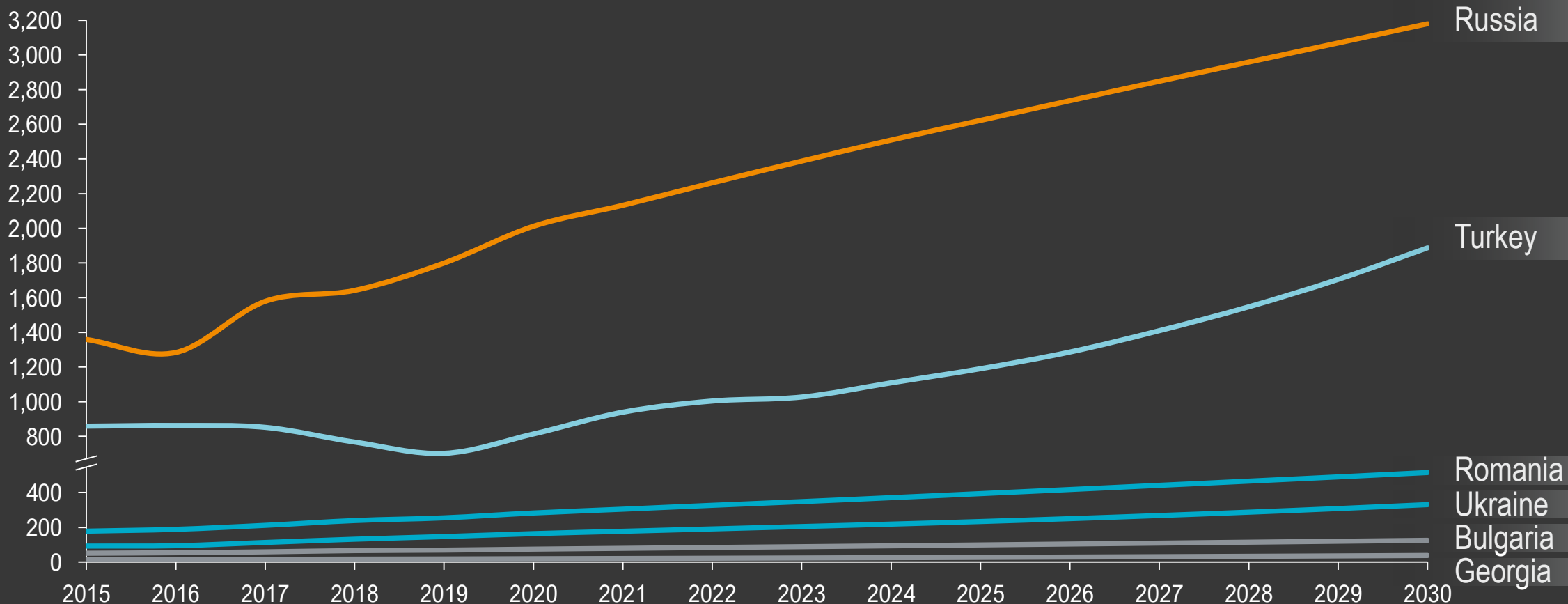




## **C. Regional trade and maritime trends**

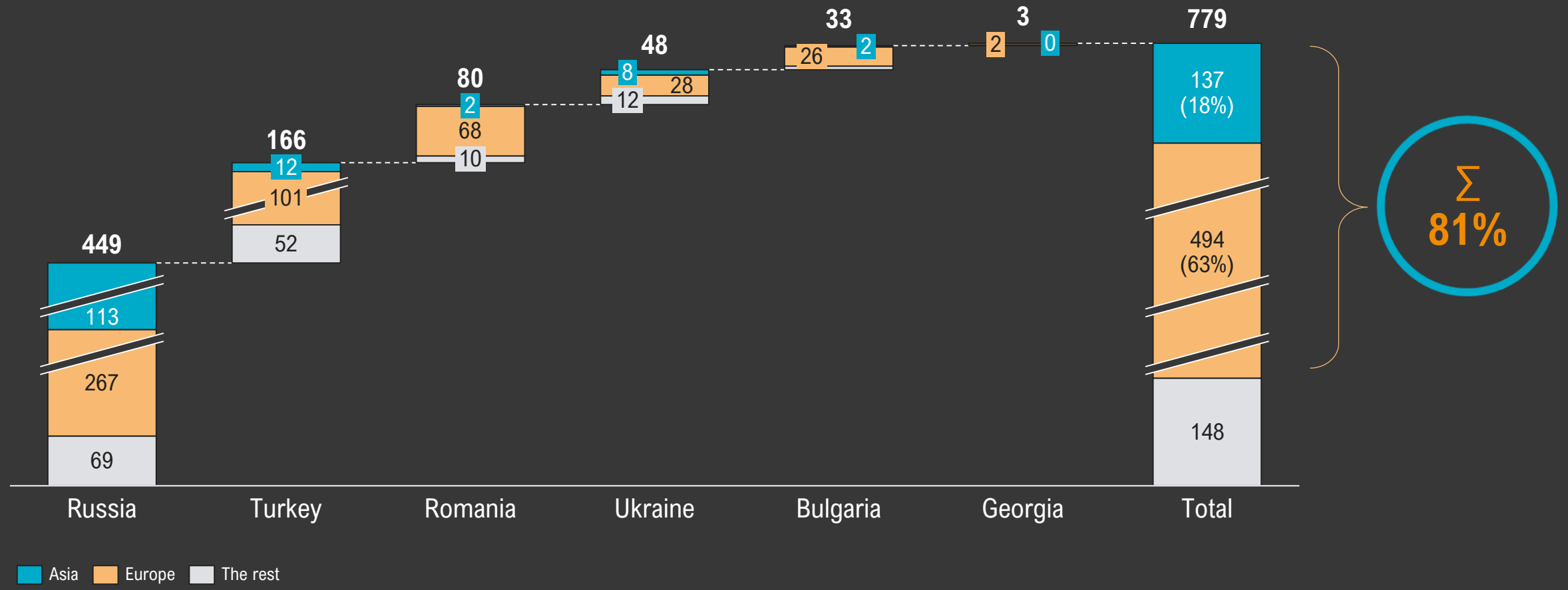
# Black Sea countries are expected to continue economic growth, implying growth in port throughput and capacity

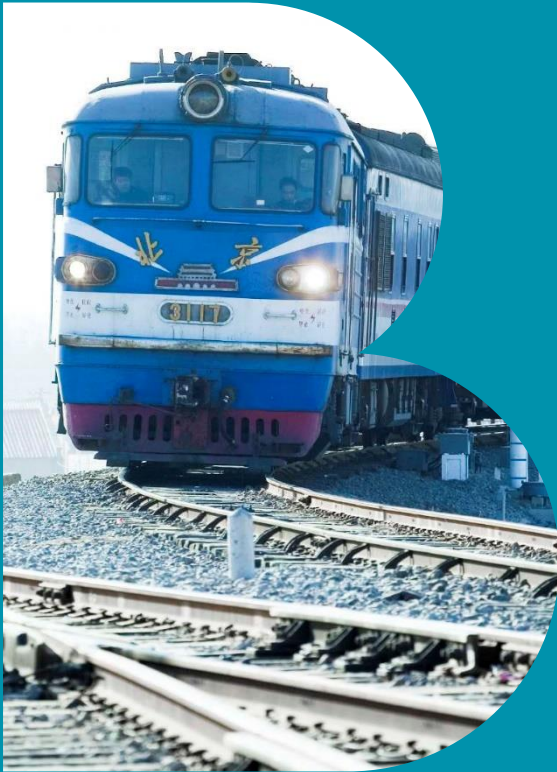
Black Sea countries' GDP [USD, bn]



# Europe is the main trading partner for Black Sea countries - Trade with Asia likely to grow faster

Black Sea countries' exports [USD, bn, 2018]





## D. BRI developments



# China's Belt and Road Initiative (BRI) is ambitious and it is global

## China BRI Vision

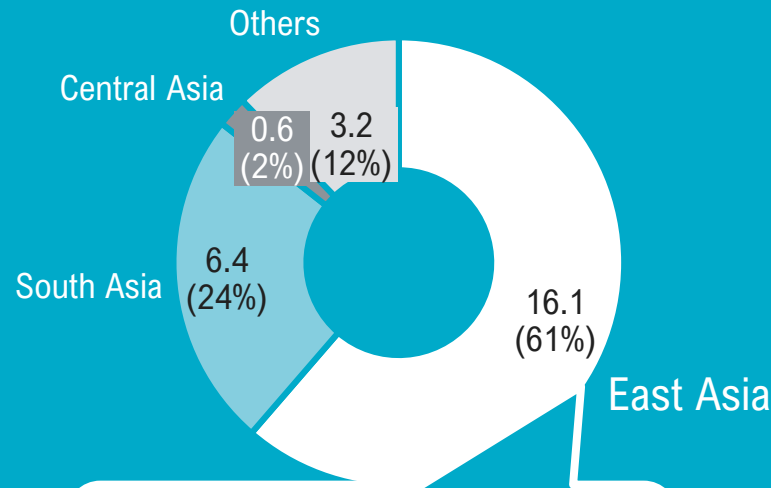


To construct a **unified large market** and **make full use of both international and domestic markets**, through **cultural exchange and integration**, to enhance **mutual understanding and trust of member nations**, ending up in an innovative pattern with **capital inflows, talent pool, and technology database** – China govt.



## Key figures of Belt and road initiative

Infrastructure needs by region [USD tr, 2016-2030]



Central Asia, South Asia and East Asia expected to account for majority of BRI spend

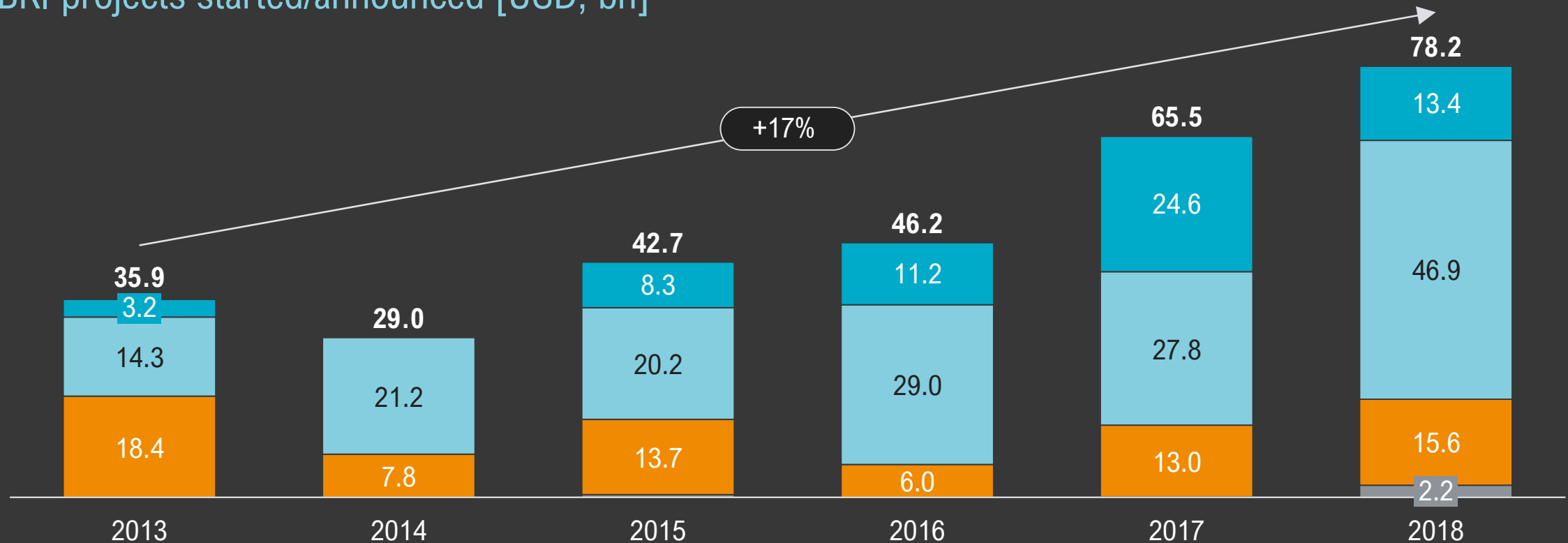
**62%** of world's population



**USD 4 - 8 trn** in total projected investment

# In BRI spending, emphasis is mainly on transport infrastructure, utilities and industrial parks

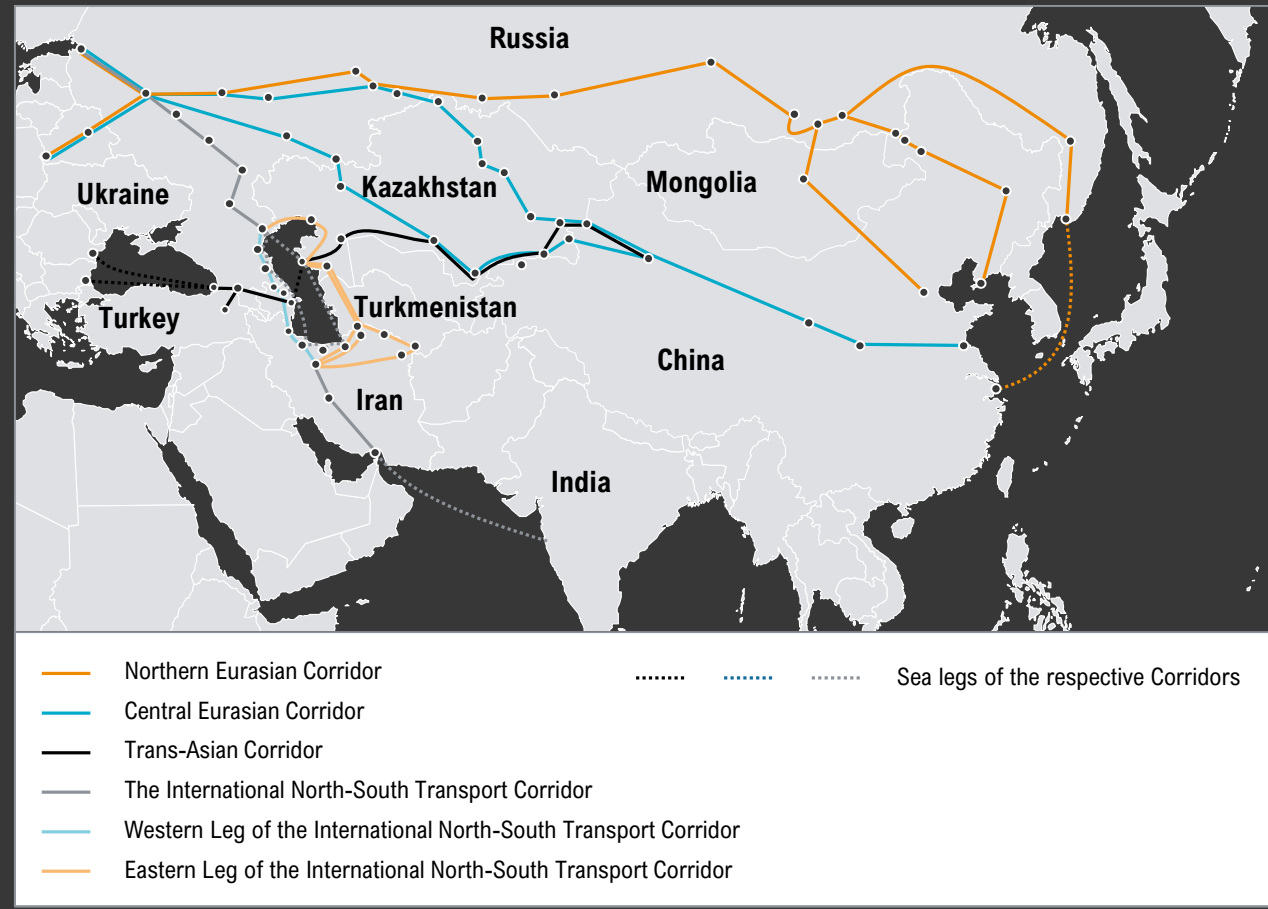
BRI projects started/announced [USD, bn]



Industrial park Transport Utilities Others

# Vitalizing and enabling overland East-West trade is a central idea in the overall BRI/OBOR concept

## Current development across the 4 routes



### Northern Eurasian Corridor

Developing rapidly

### Central Eurasian Corridor

Developing, but slow (Kazakhstan)

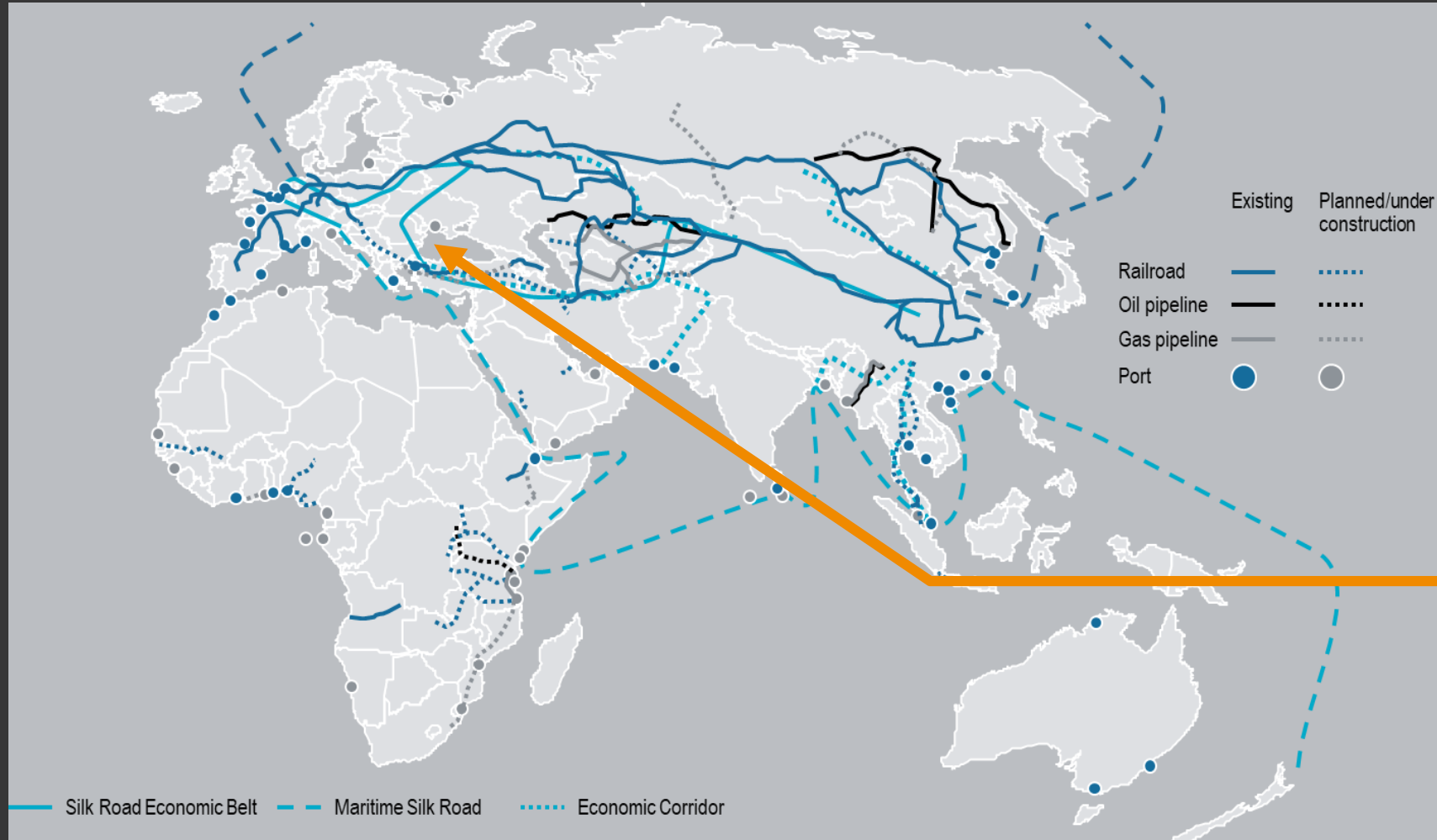
### Trans-Asian Corridor

Challenges of interface land-sea (Caspian Sea, Black Sea)

### International North-South Corridor

Iran, geopolitics

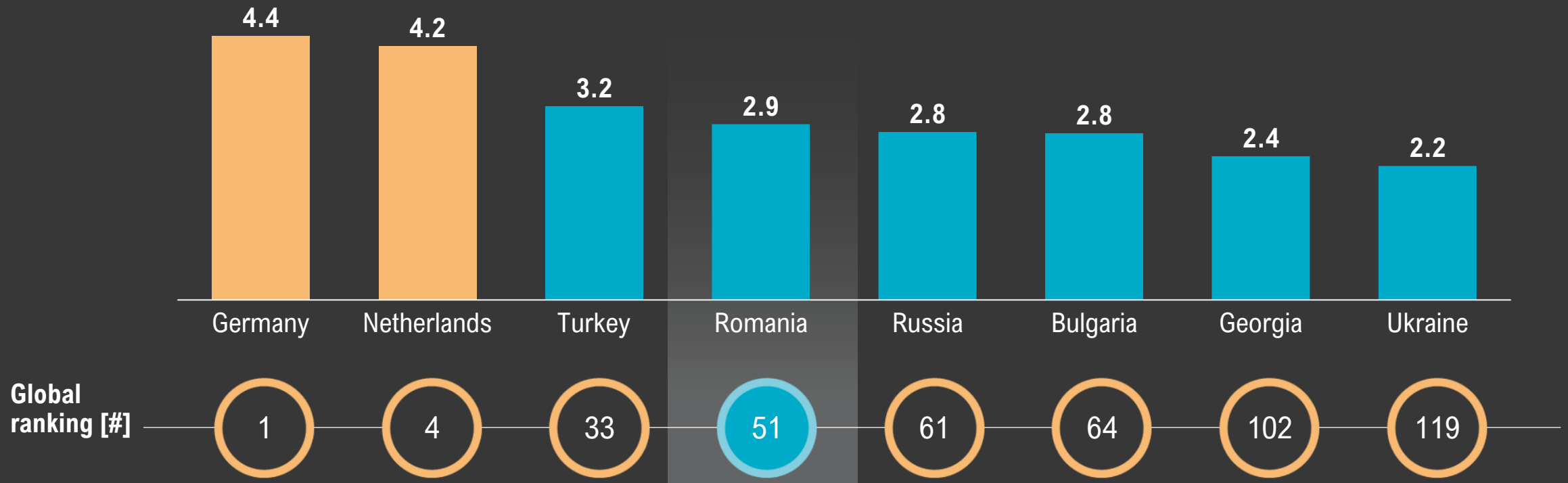
# Port and port-related investments are providing China new entry points to Europe (Greece, Italy, Portugal) ...



... and ports in the Western part of the **Black Sea** could do the same

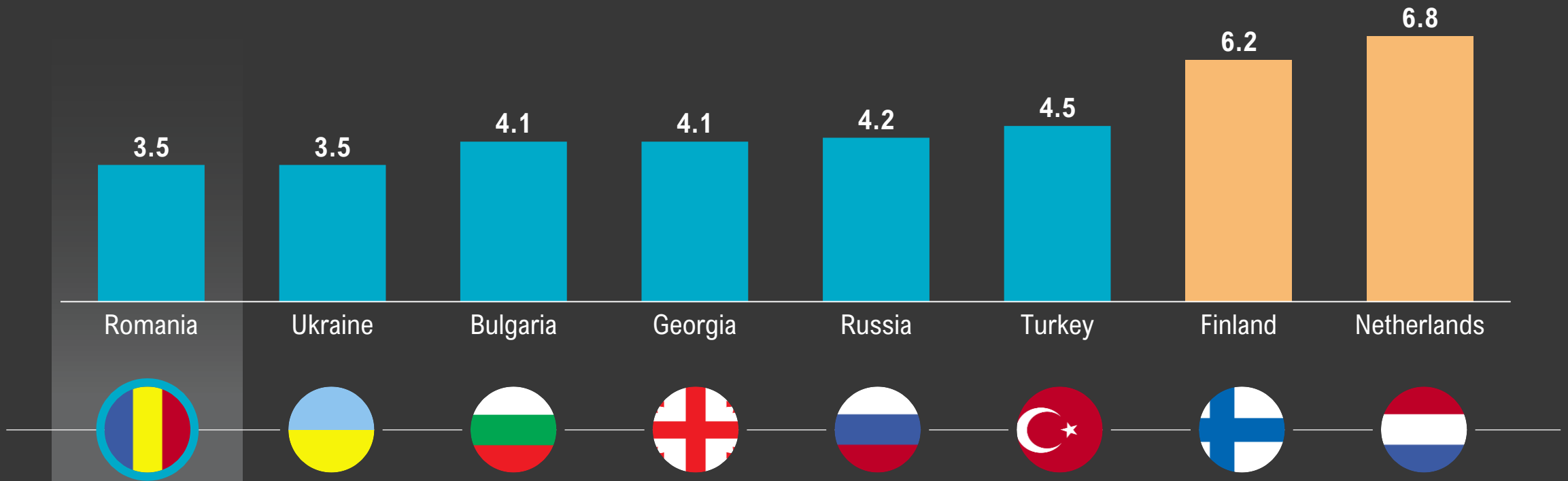
# BRI investments could potentially help improve the overall transport infrastructure in the region ...

2018 Logistics Infrastructure index (scale is 1-5)



# ... including their port infrastructure

Port Quality Index (scale 1-7)





## E. Some suggestions

# How to develop the port infrastructure in the Black Sea region/ Romania

Some suggestions



Remove bottlenecks  
(road/ rail  
infrastructure for e.g.  
outbound cargo)



Conduct proper  
feasibility studies  
(demand assessment,  
CAPEX split, business  
case, etc.)



Careful risk  
assessment and  
bankability



Improve port  
services to better  
jockey for business



Roland  
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THINK:ACT

