Traffic flows between the Baltic ports and other major European ports

Feeder, Ferry and Short Sea cargo traffic in the Mediterranean Area
Genoa, 17th – 20th April 2007

Maciej Matczak, Ph.D.
Actia Forum Ltd.
Gdynia Maritime University

PRESENTATION SCHEME

1. Baltic Sea Region – general information
2. Baltic Seaports – current performance
3. Baltic Regular Shipping – main data:
   – Container traffic;
   – Ro-Ro transport;
   – Passengers traffic.
4. UK – BSR (Port-Net Study 03-2)
5. Summary

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Actia Consulting

BSR COUNTRIES
FACTS AND FIGURES

COUNTRIES OF THE BALTIC SEA REGION

- **Area of the BSR:** 1 693,9 thou. km^2 (42,2% EU 25)
- **BSR Population:** 147 731 thou. people (32,8% EU 25)
- **BSR:** 18% of global production
- **BSR:** 16% of global export

BALTIC SEA REGION SEAPORTS

- **408 Seaports**
- **Annual turnover of the Baltic Seaports**: over 700 m tones and 65 m passengers
- **Total annual container turnover**: over 6.5 m TEU (2006)

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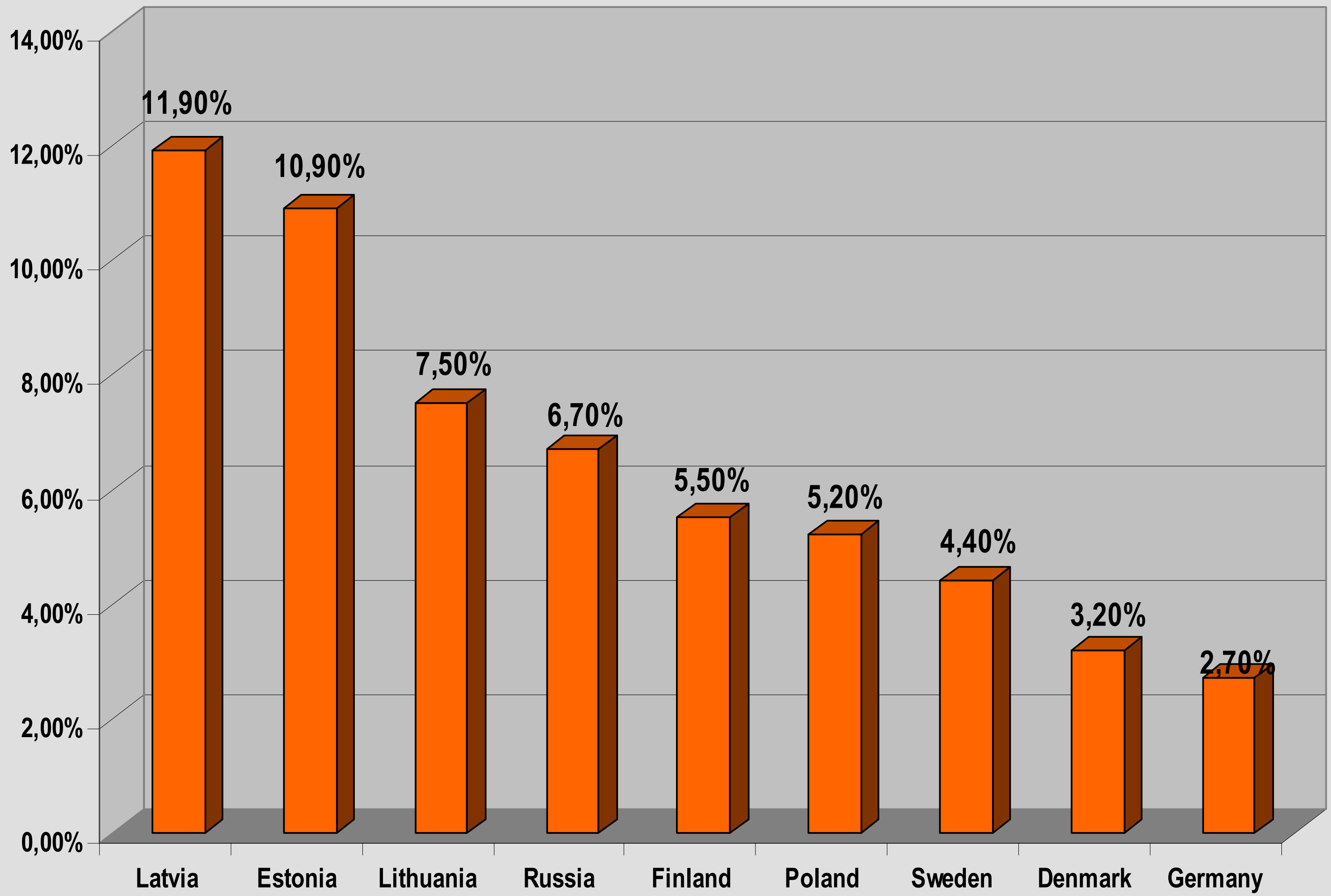
GDP DEVELOPMENT
IN BSR COUNTRIES IN 2006



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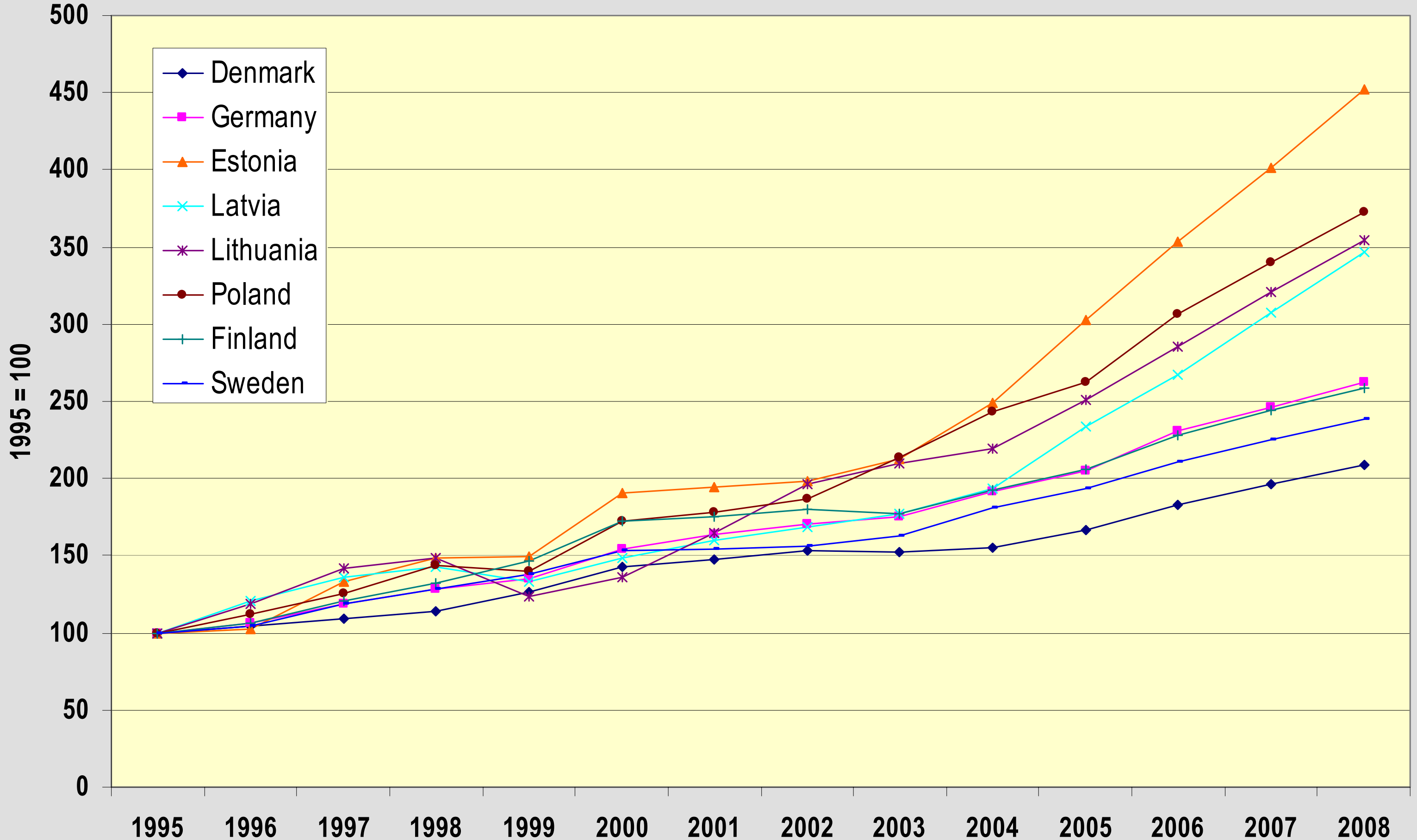
THE FOREIGN TRADE DEVELOPMENT
OF THE BSR COUNTRIES



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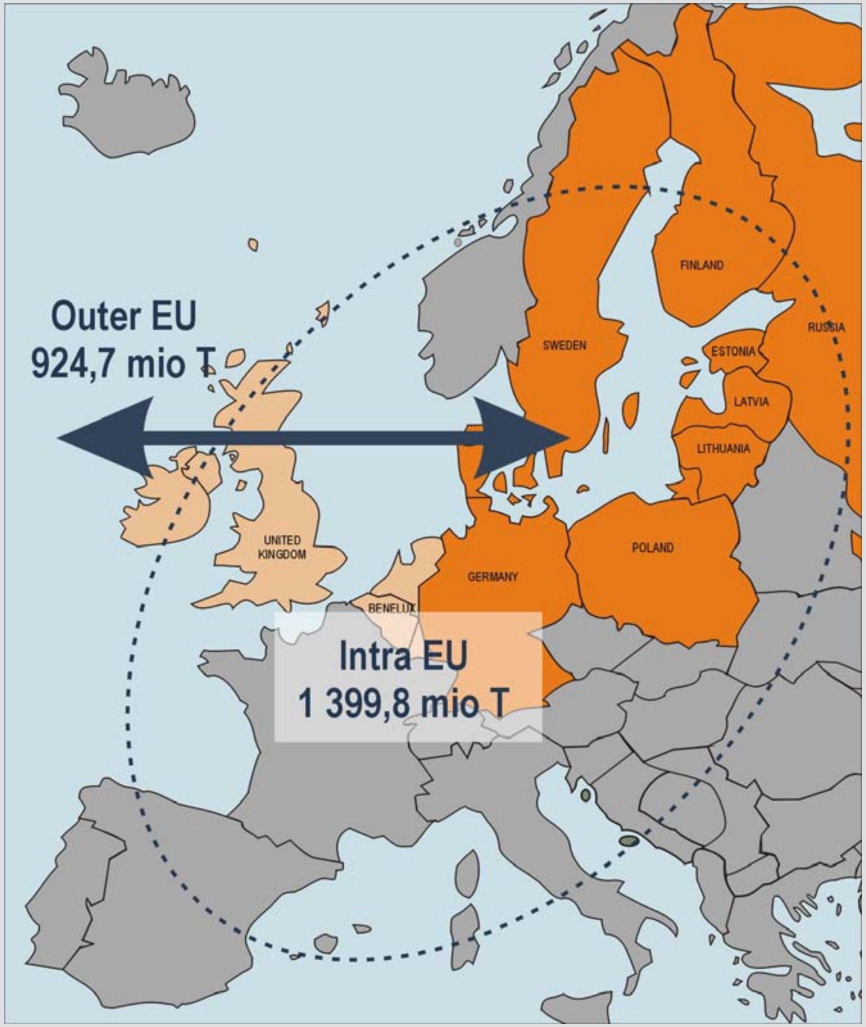
BSR COUNTRIES
EXTERNAL EXCHANGE VOLUME



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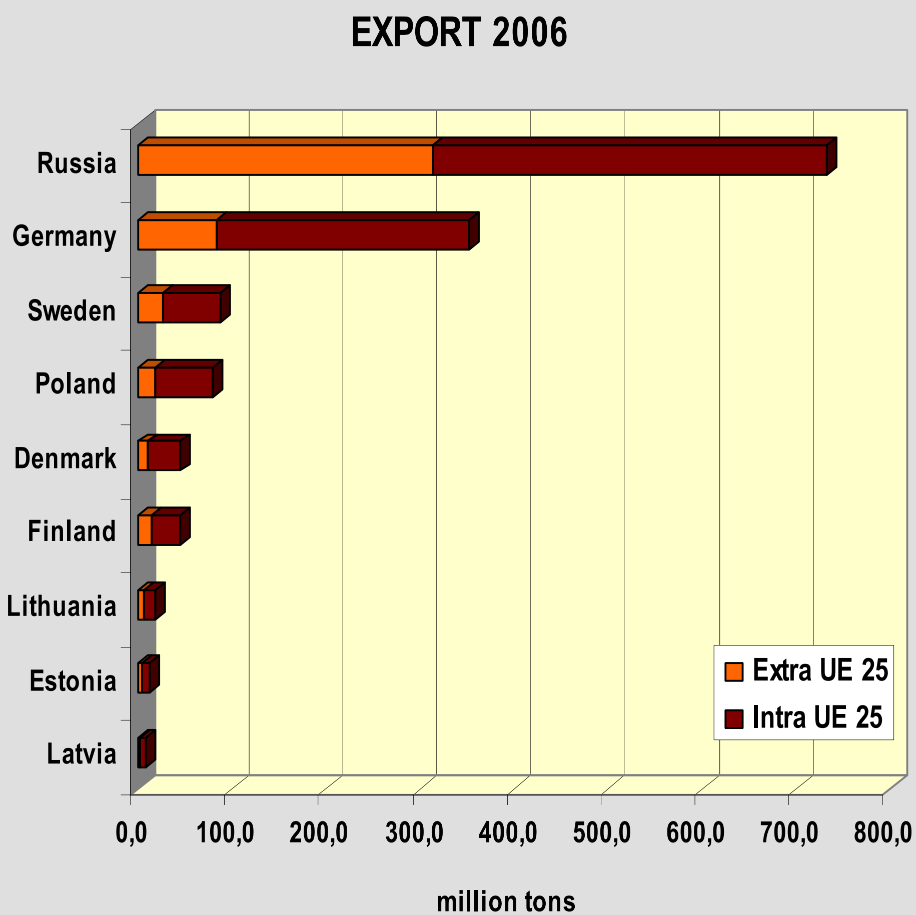
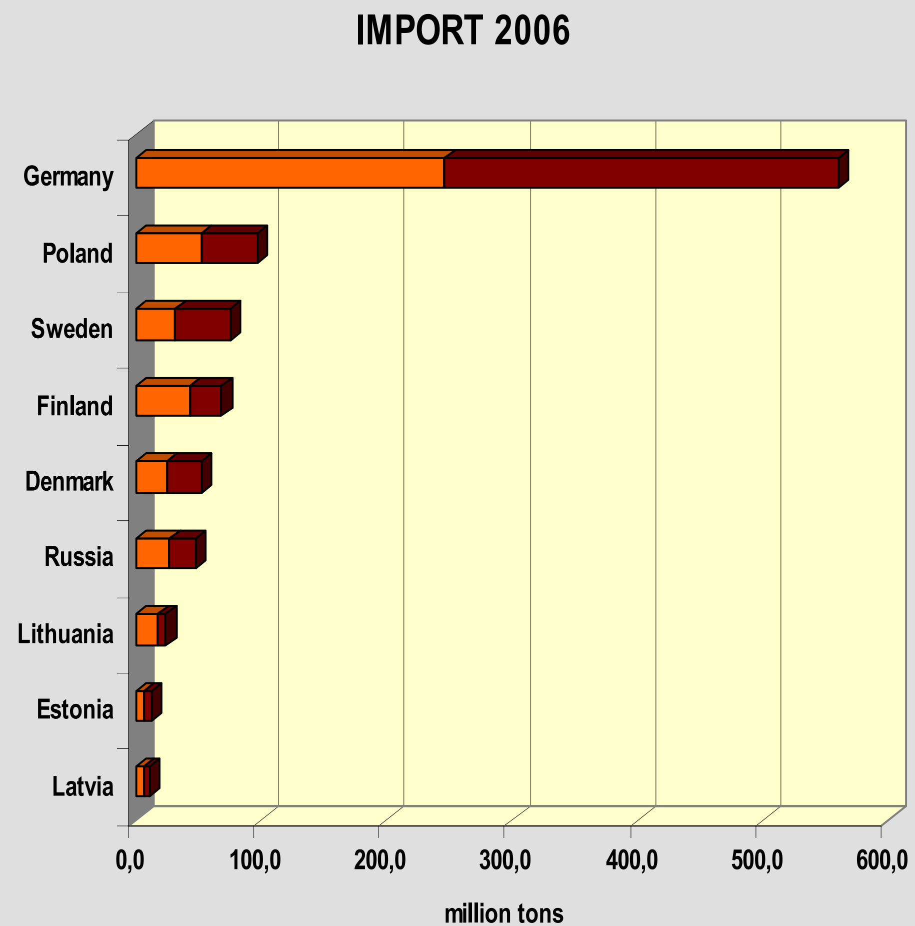
THE EXTERNAL EXCHANGE VOLUME
IN THE BALTIC COUNTRIES





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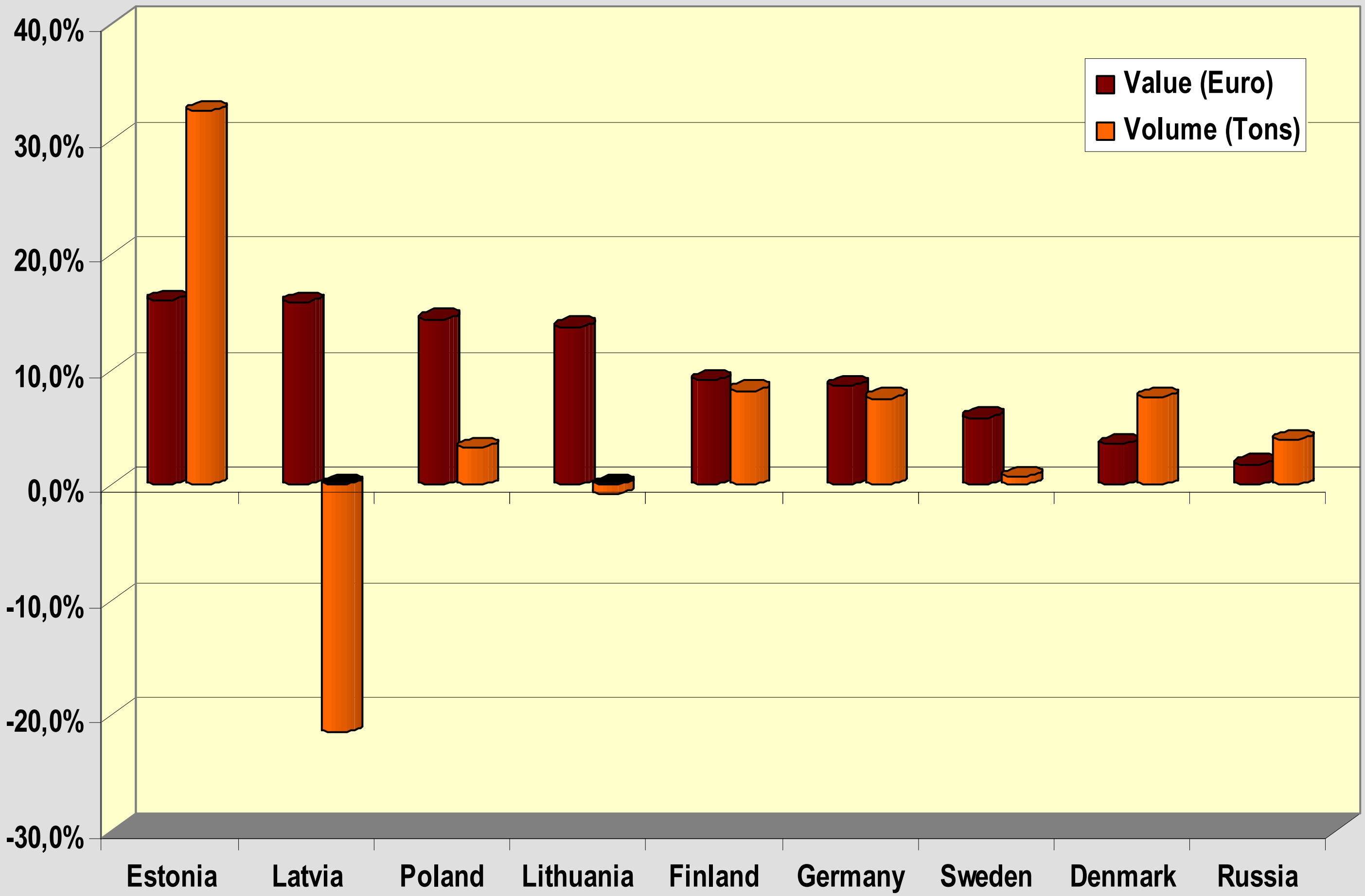
THE VALUE AND VOLUME OF FOREIGN TRADE DEVELOPMENT IN THE BSR COUNTRIES IN 2006



BSR COUNTRIES
MAIN TRADE PARTNERS

FOREIGN TRADE PARTNERS:

Denmark –	Germany, Sweden, United Kingdom;
Estonia –	Finland, Sweden, Germany, Russia;
Lithuania –	Russia, Switzerland, Germany, Poland, Latvia;
Poland –	Germany, Russia, Czech, Austria, Ukraine;
Germany –	France, USA, Netherlands, United Kingdom, China;
Sweden –	USA, Germany, Denmark, Norway, United Kingdom;
Finland –	Russia, Germany, Sweden, United Kingdom;
Latvia –	Germany, Lithuania, Russia, Sweden, Estonia;
Russia –	Germany, Netherlands, Italy, China;

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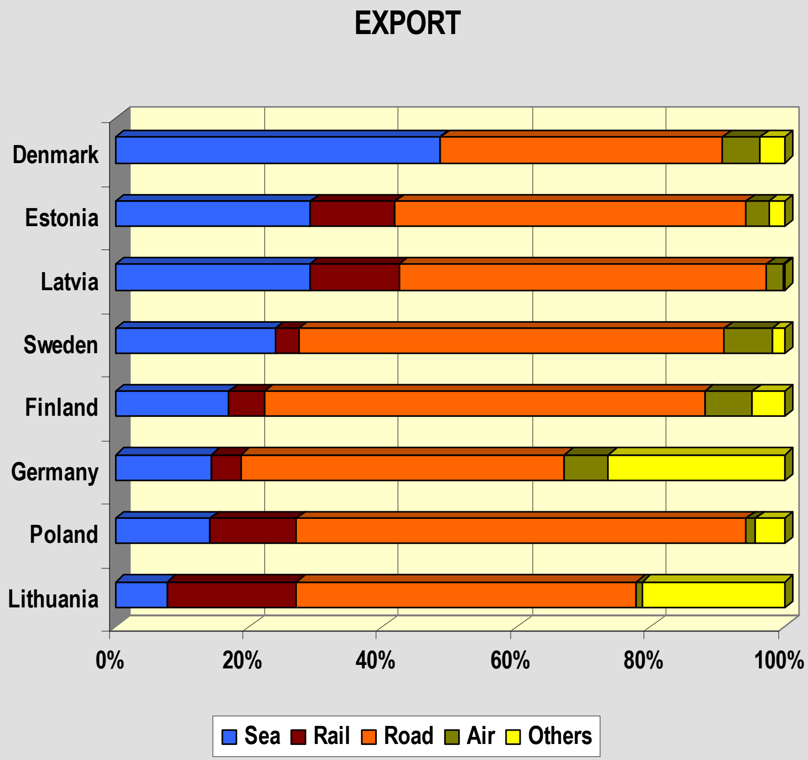
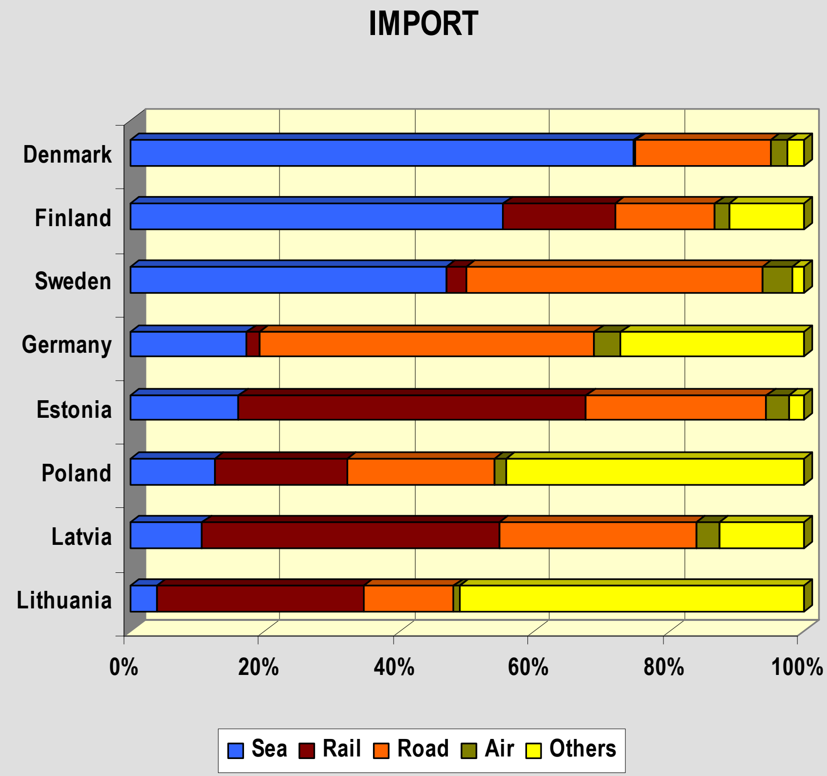
EUROPEAN FOREIGN TRADE
BY MODE OF TRANSPORT





TRADE VALUE, YEAR 2004

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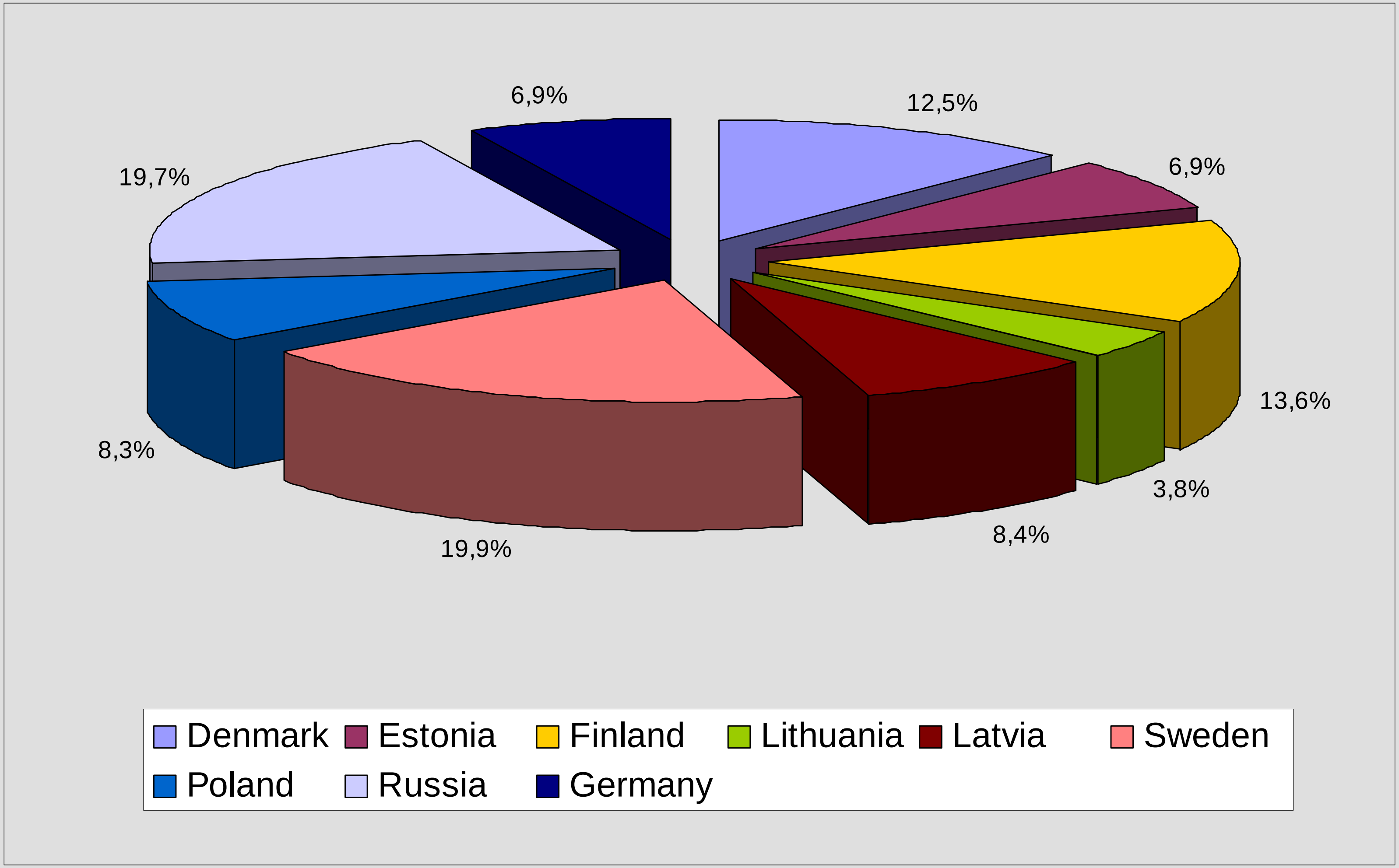
BALTIC SEAPORTS TURNOVER MARKET SHARE IN 2005



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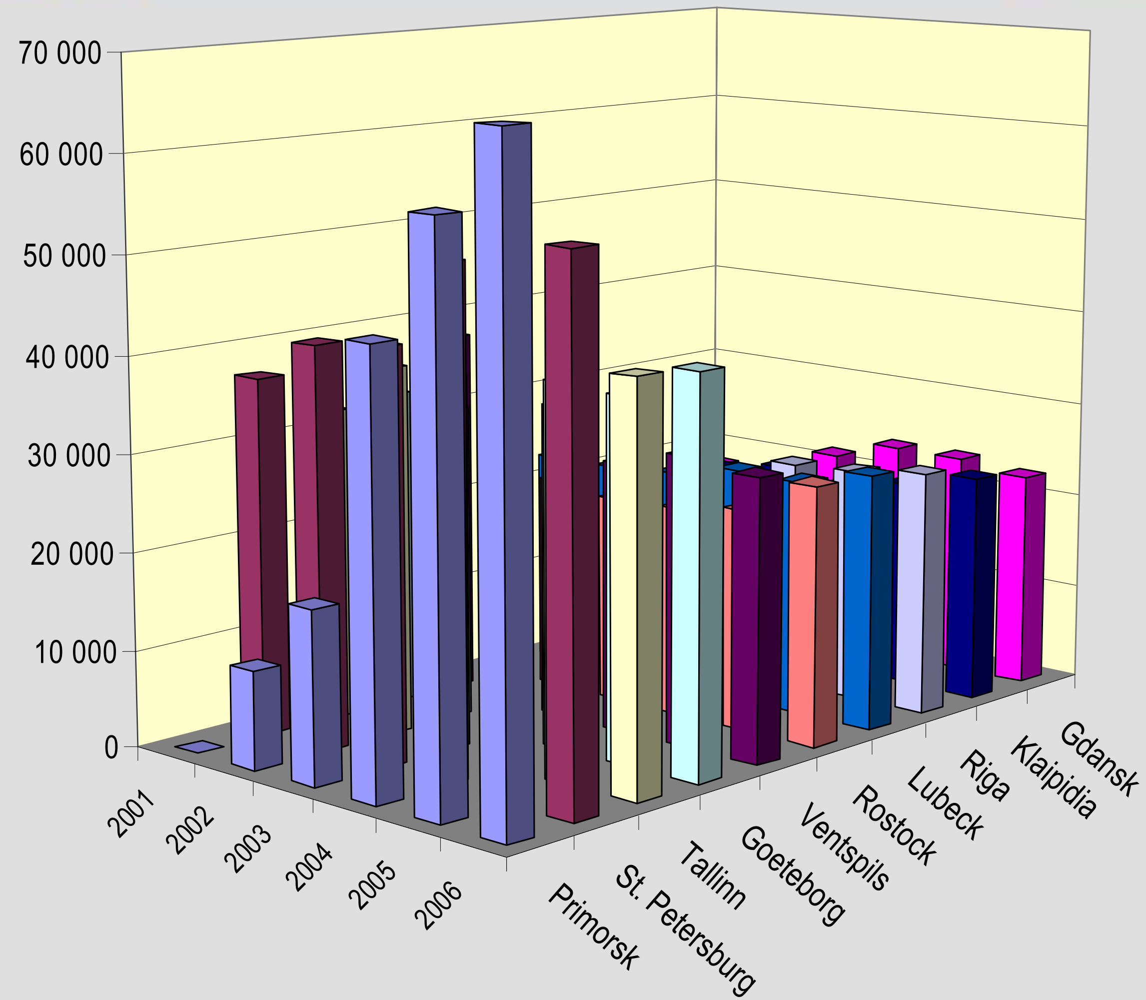
TOTAL CARGO TURNOVER
IN THE BALTIC SEAPORTS 2001 – 2006



M TONS

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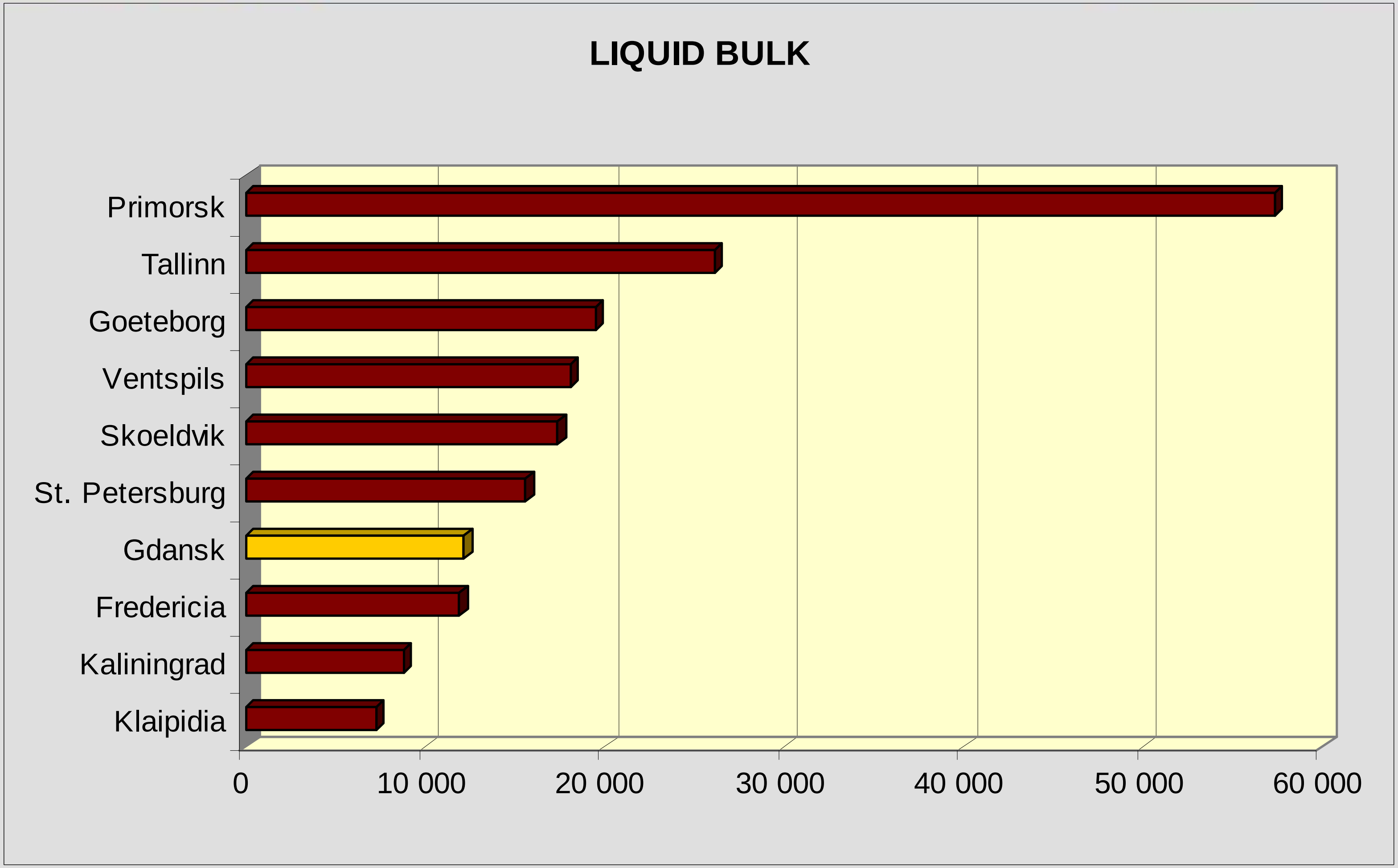
TOP 10 LIQUID BULK SEAPORTS
ON THE BALTIC IN 2005



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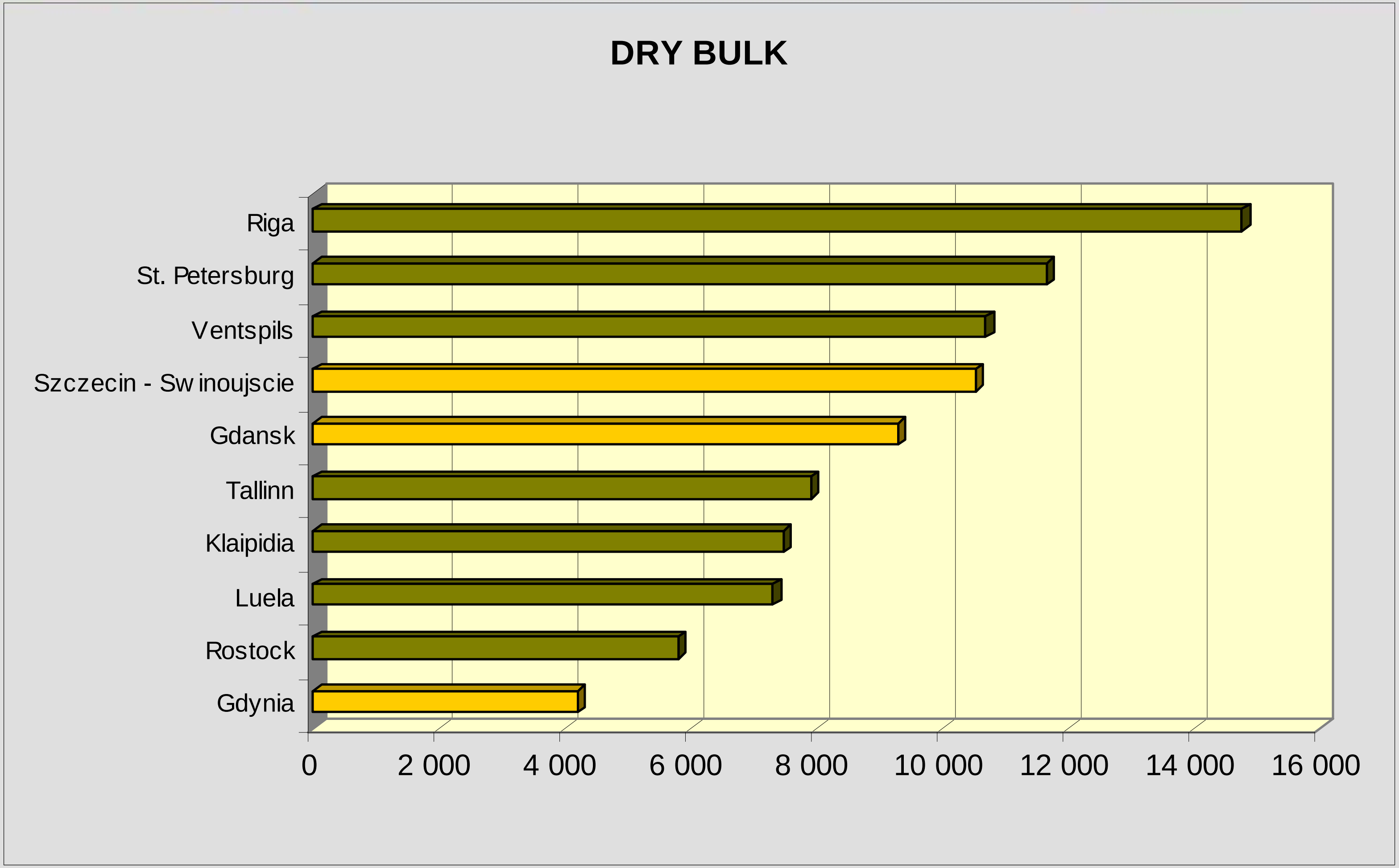
TOP 10 DRY BULK
BALTIC SEAPORTS IN 2005



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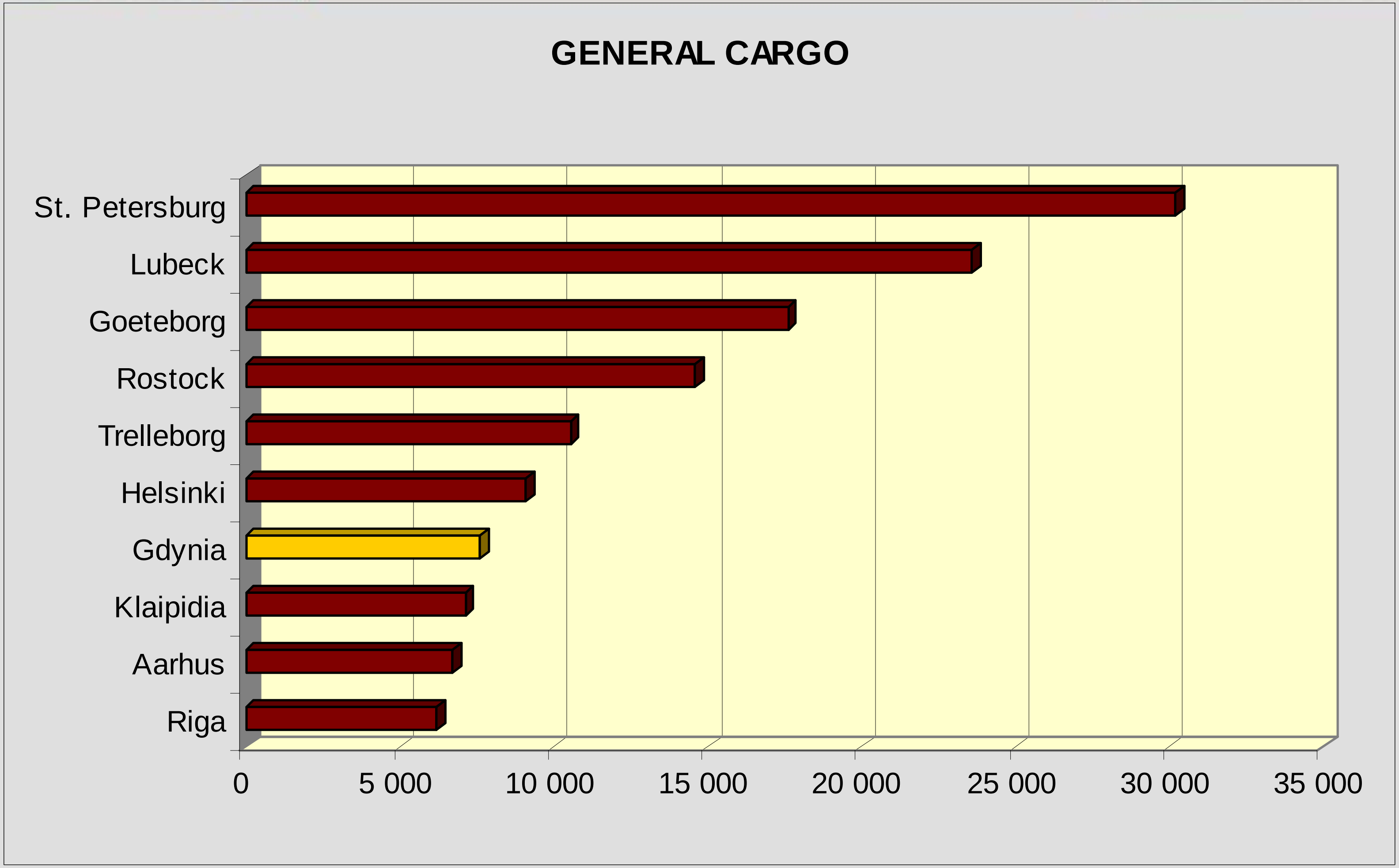
TOP 10 GENERAL CARGO SEAPORTS
ON THE BALTIC IN 2005



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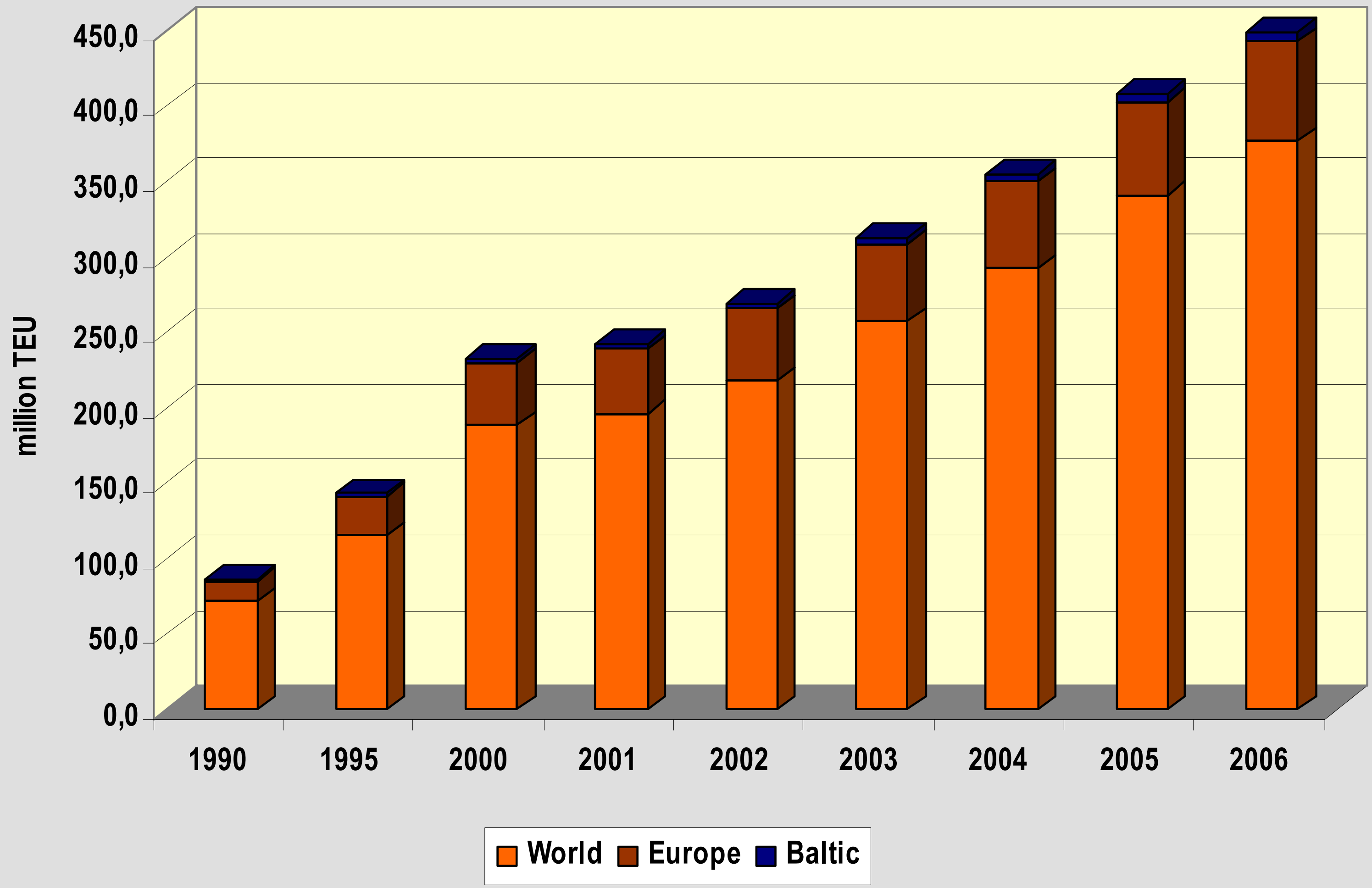
THE BALTIC AND EUROPEAN CONTAINER SEAPORTS ON THE WORLD MARKET



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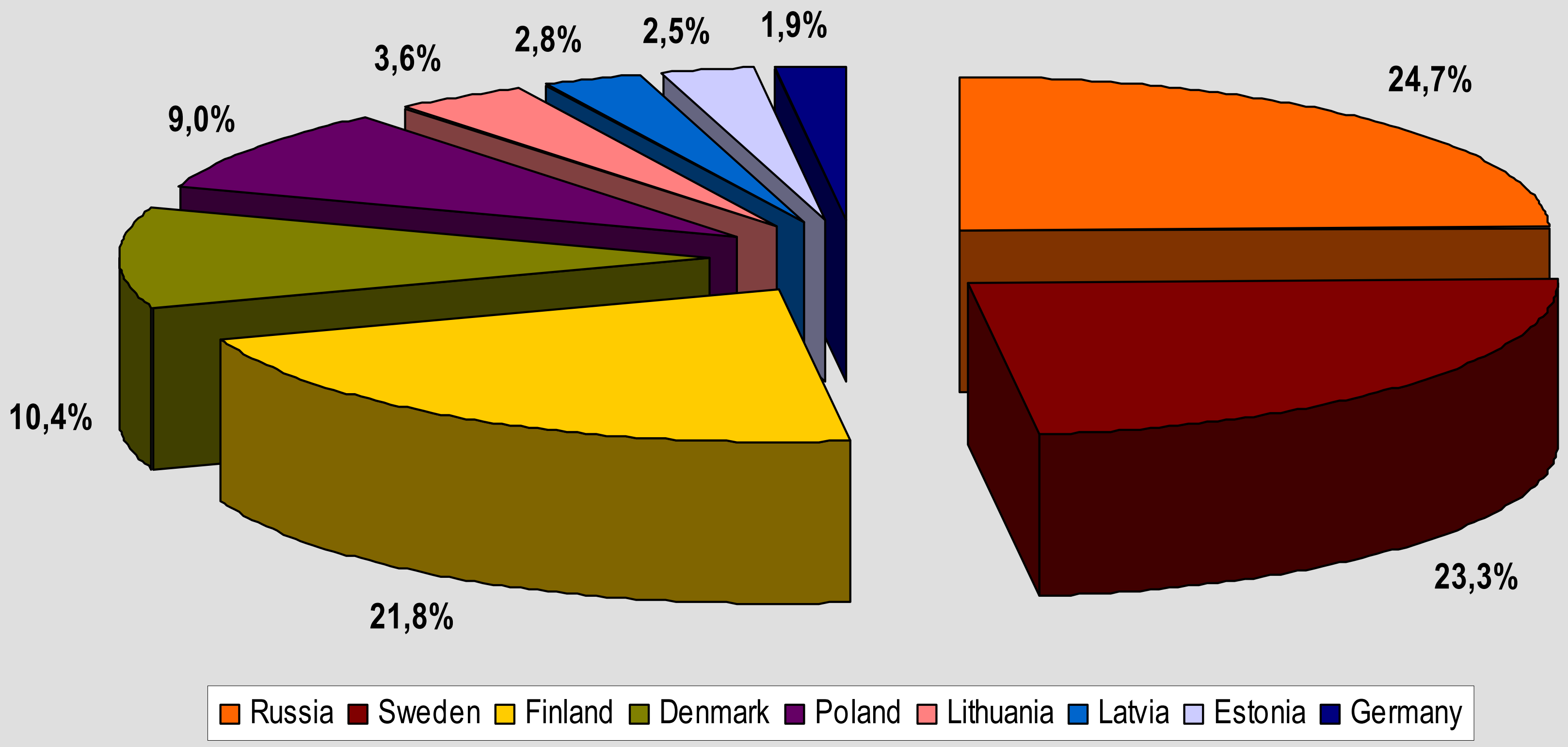
BALTIC SEAPORT CONTAINER THROUGHPUT

BY COUNTRIES IN YEAR 2006



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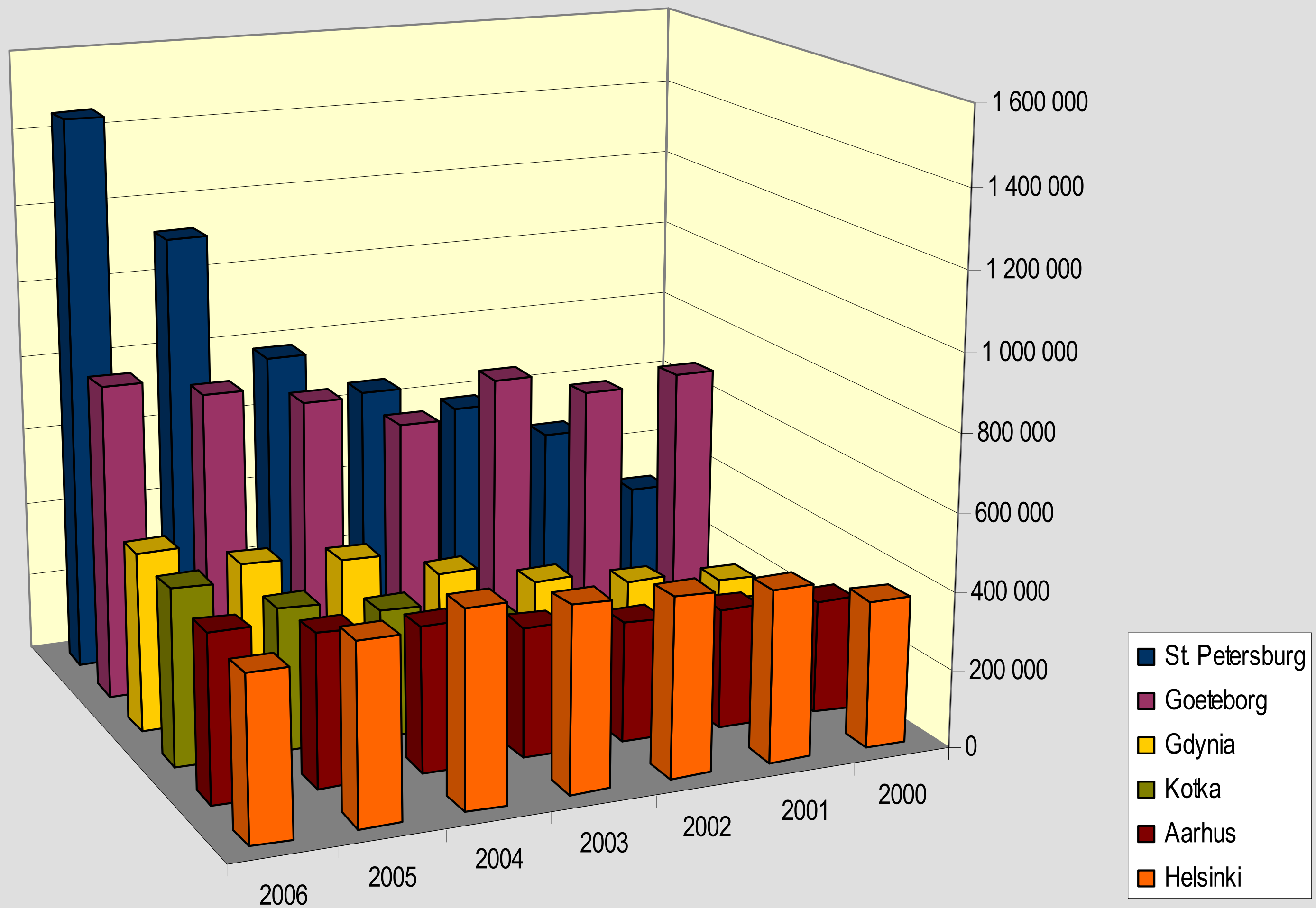
THROUGHPUT DEVELOPMENT IN THE MAIN CONTAINER SEAPORTS ON THE BALTIC



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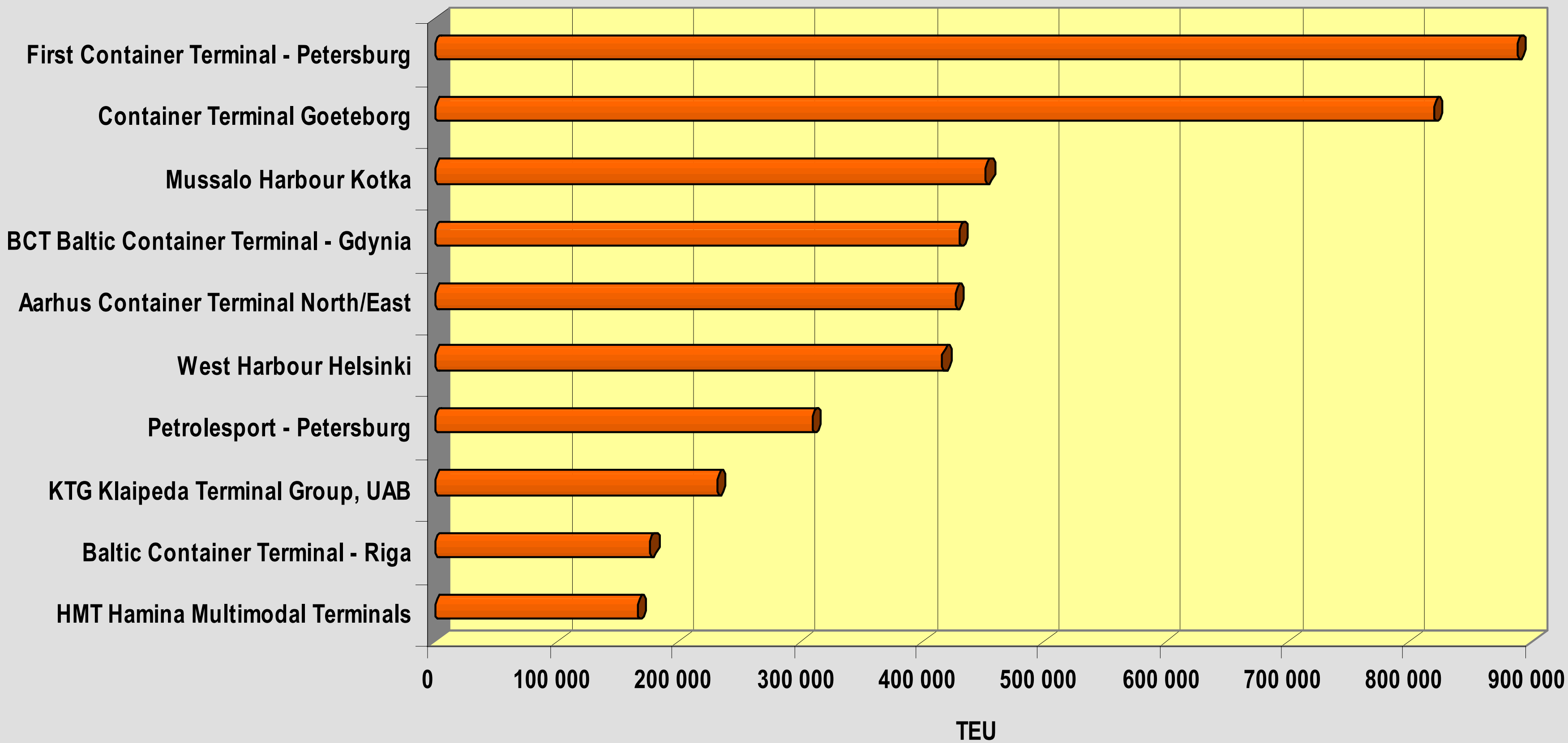
TOP 10 OF THE BALTIC CONTAINER TERMINALS
IN YEAR 2006



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THE MAIN AREAS OF THE BALTIC RoRo MARKET
IN YEAR 2006

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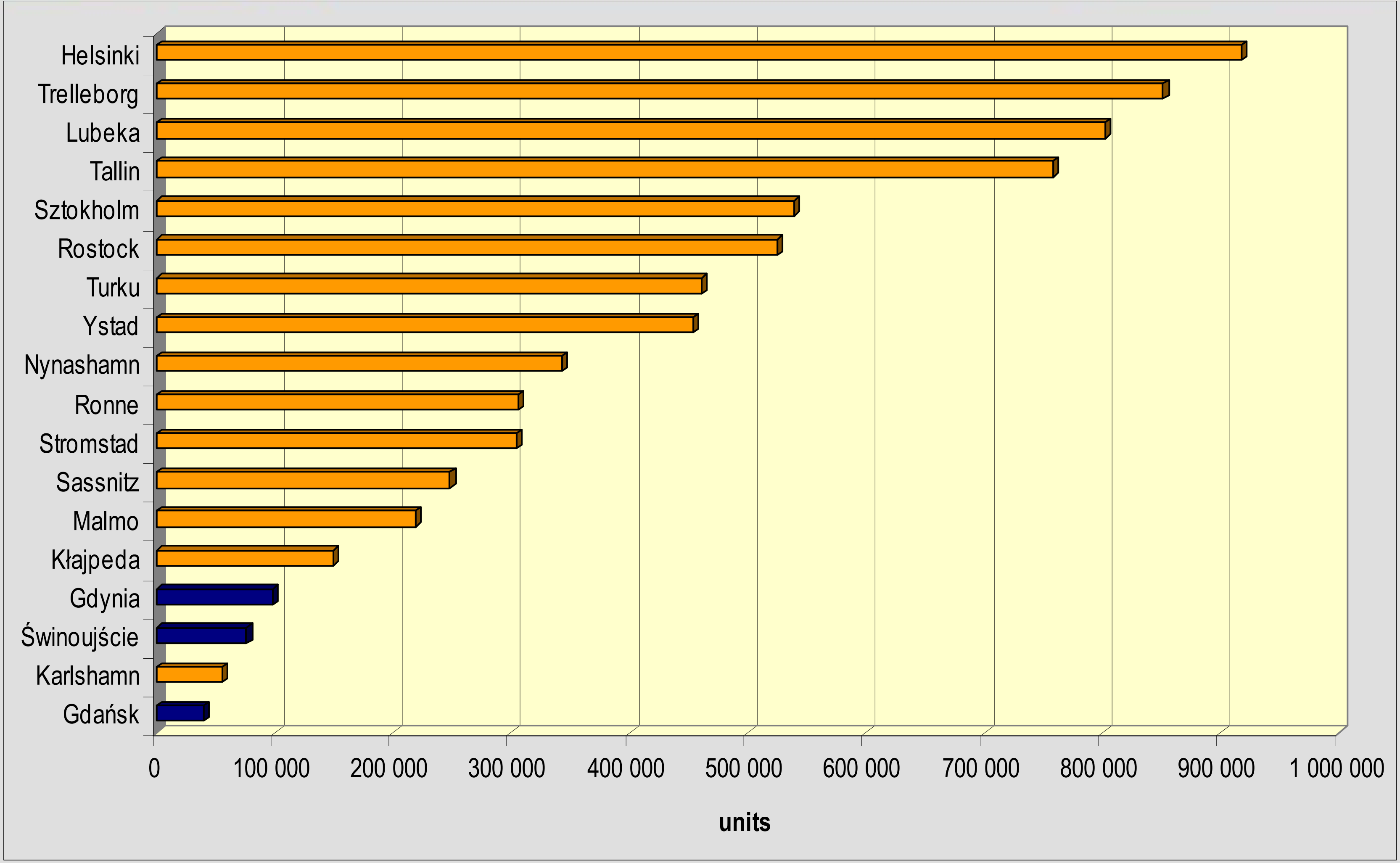
THE RANKING OF
THE TOP BALTIC RoRo SEAPORTS



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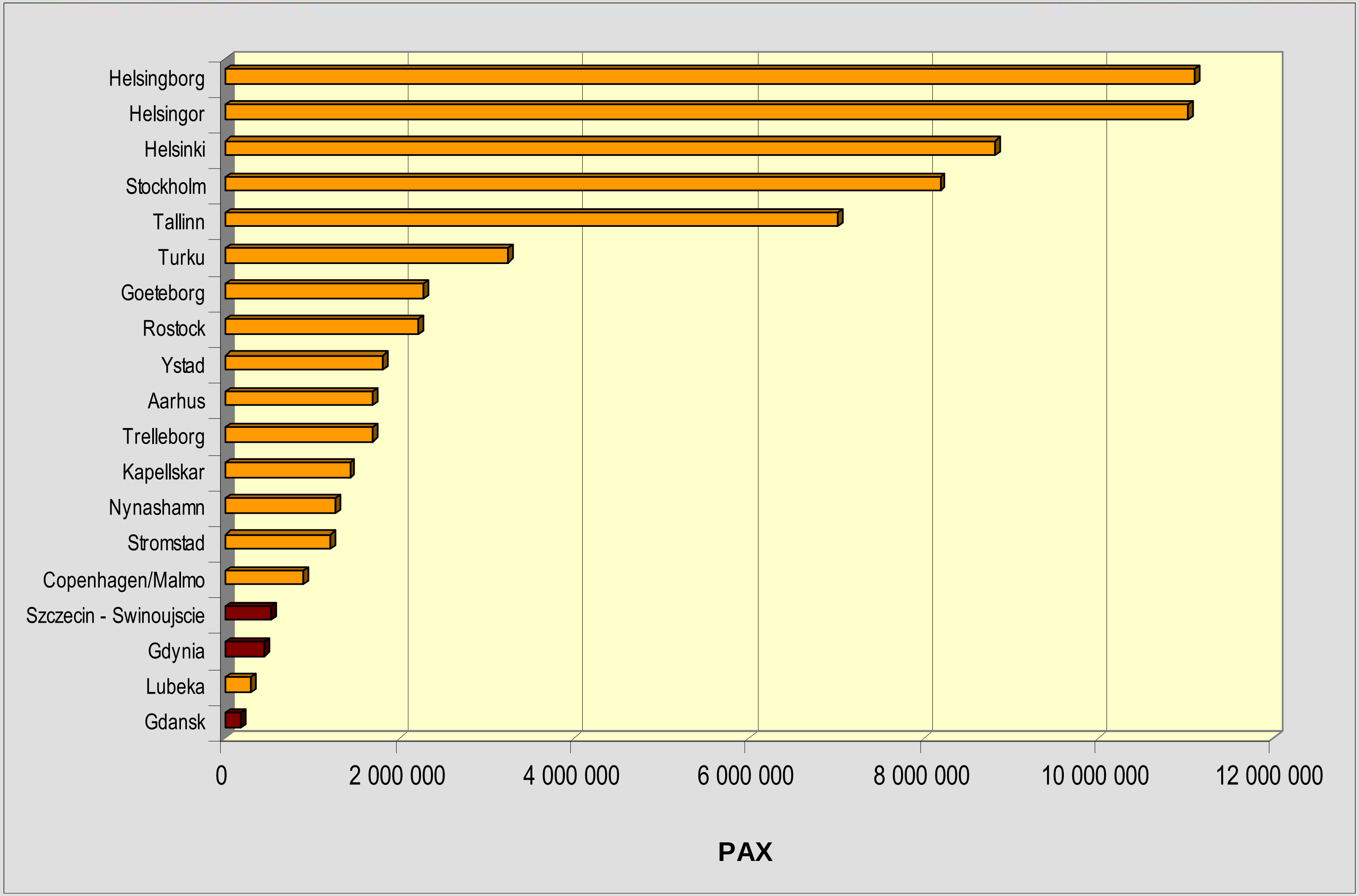
PASSENGER TRAFFIC
IN THE TOP BALTIC SEAPORTS



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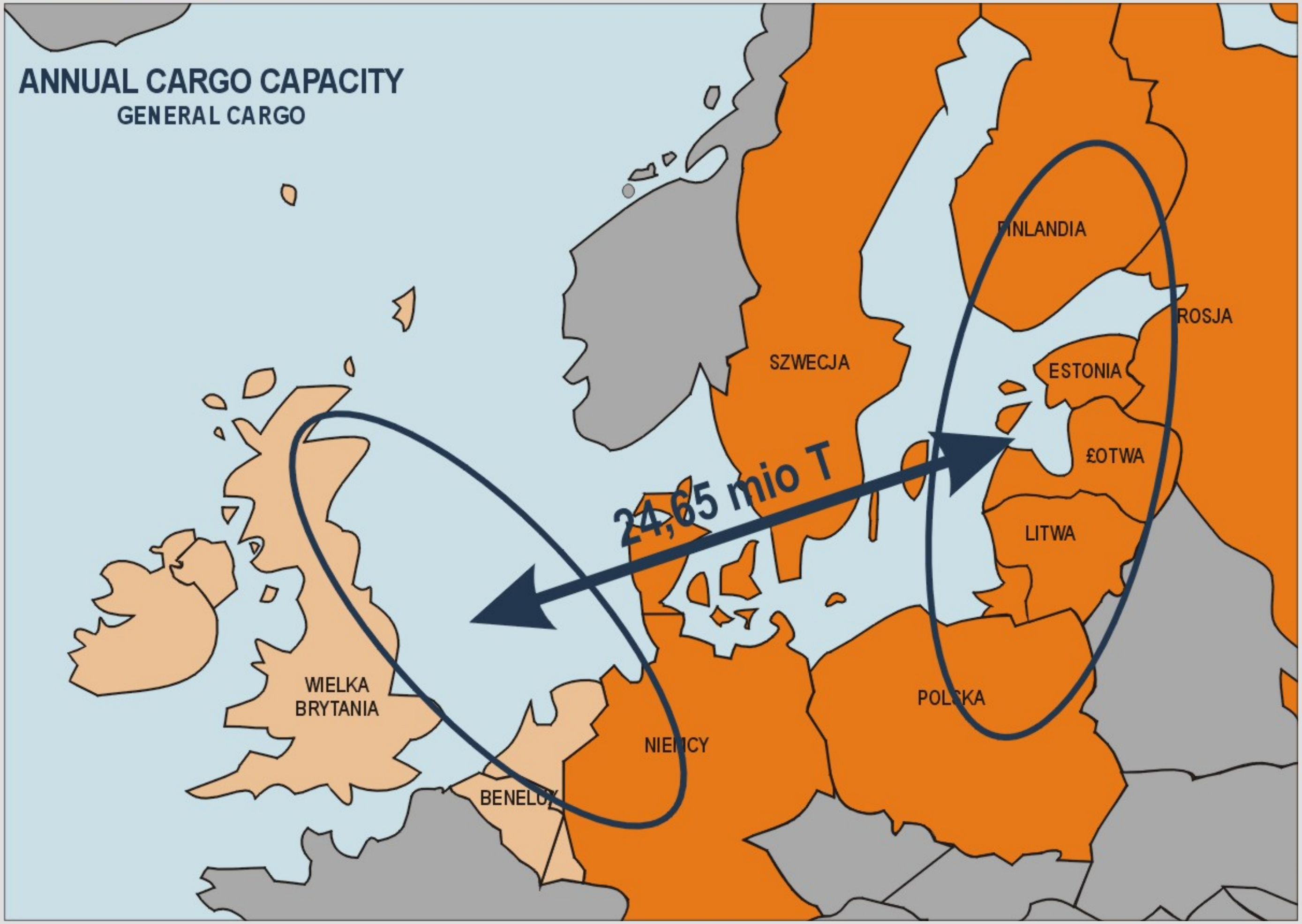
TRAFFIC FLOWS

CARGO CAPACITY OF THE MARITIME CONNECTIONS



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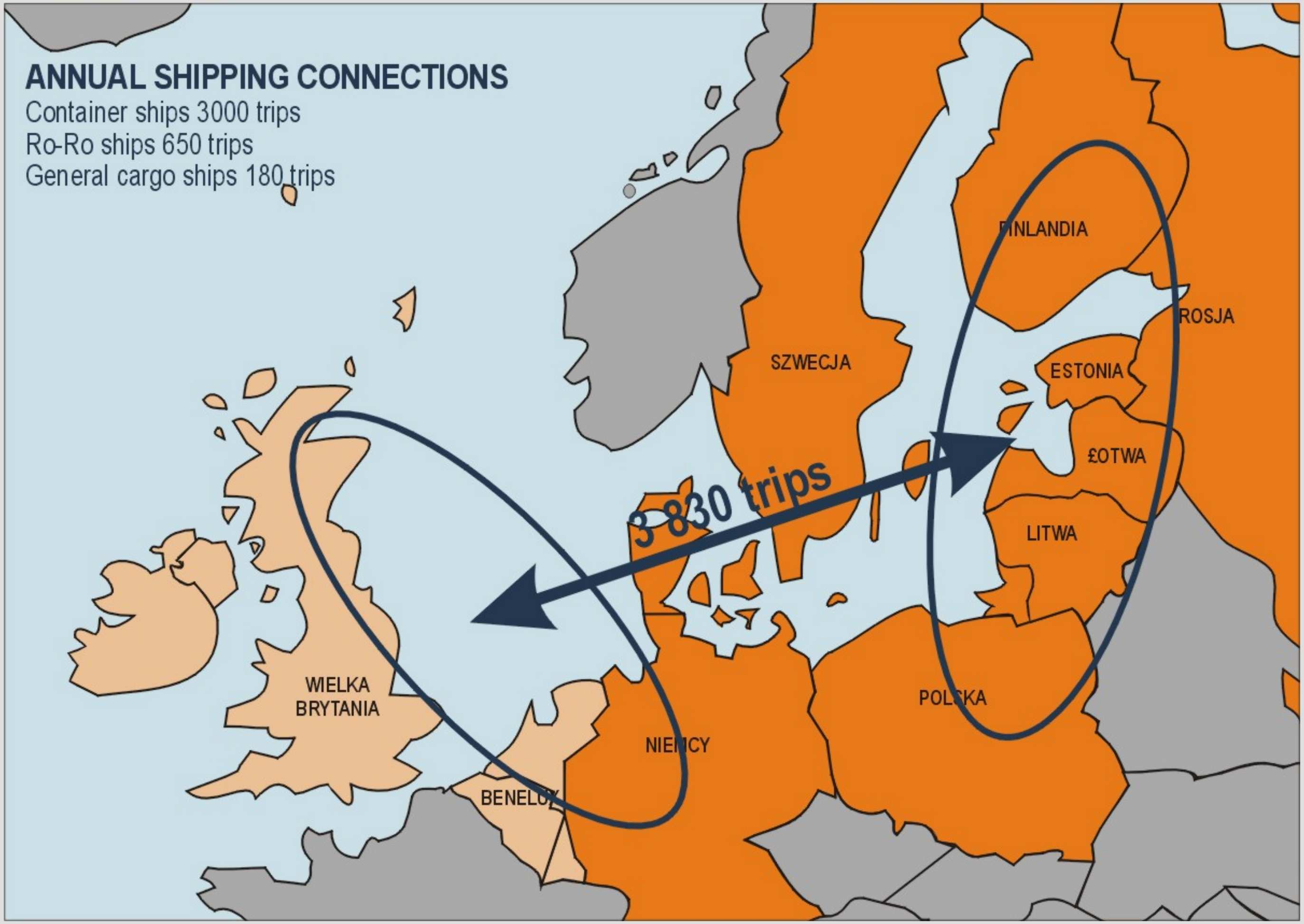
TRAFFIC FLOWS

GENERAL CARGO SHIPPING LINES



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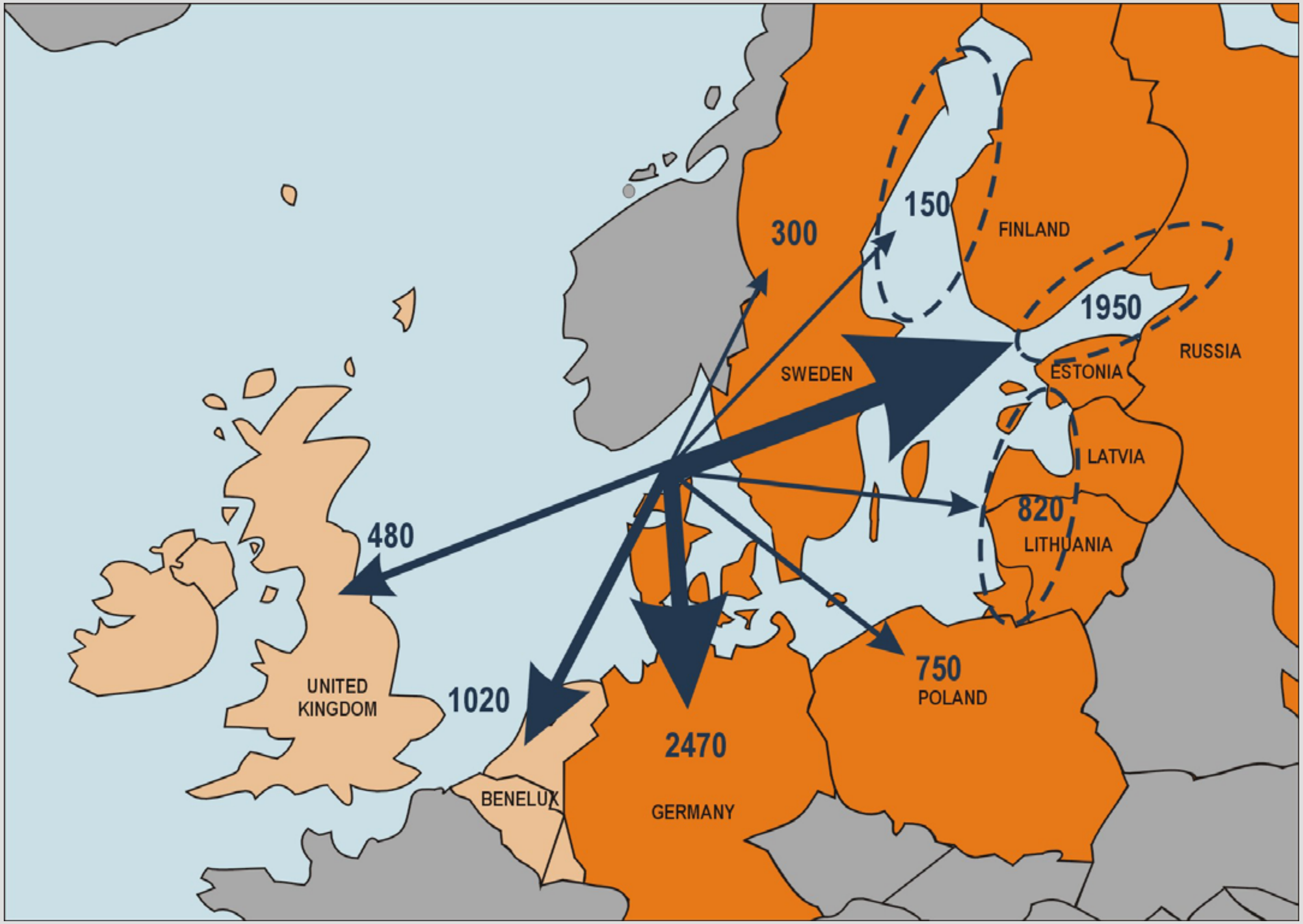
THE TRAFFIC OF CONTAINER VESSELS

ON THE BALTIC SEA IN YEAR 2006



* Round trips annualy

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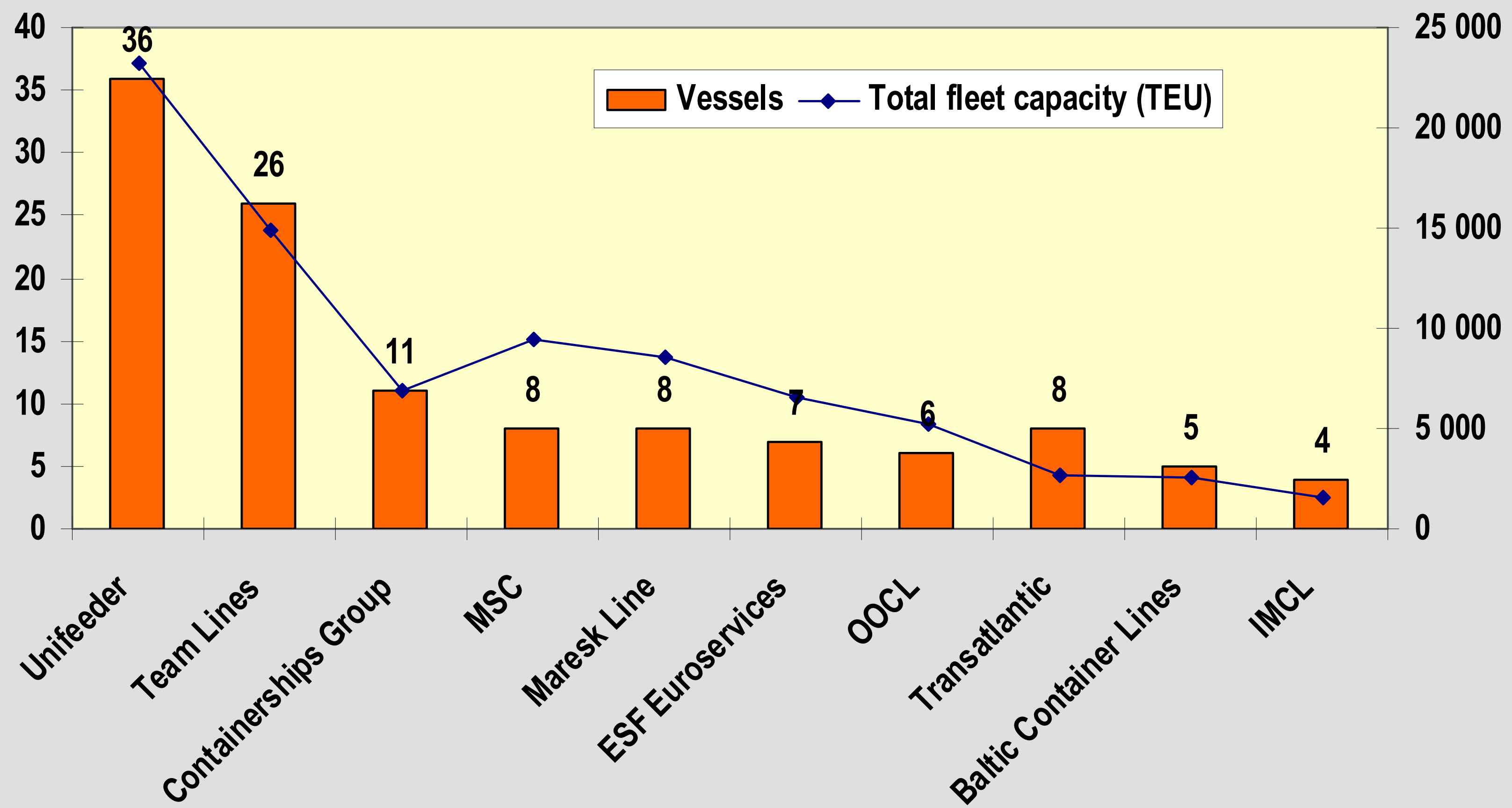
TOP BALTIC CONTAINER SHIPPING LINES



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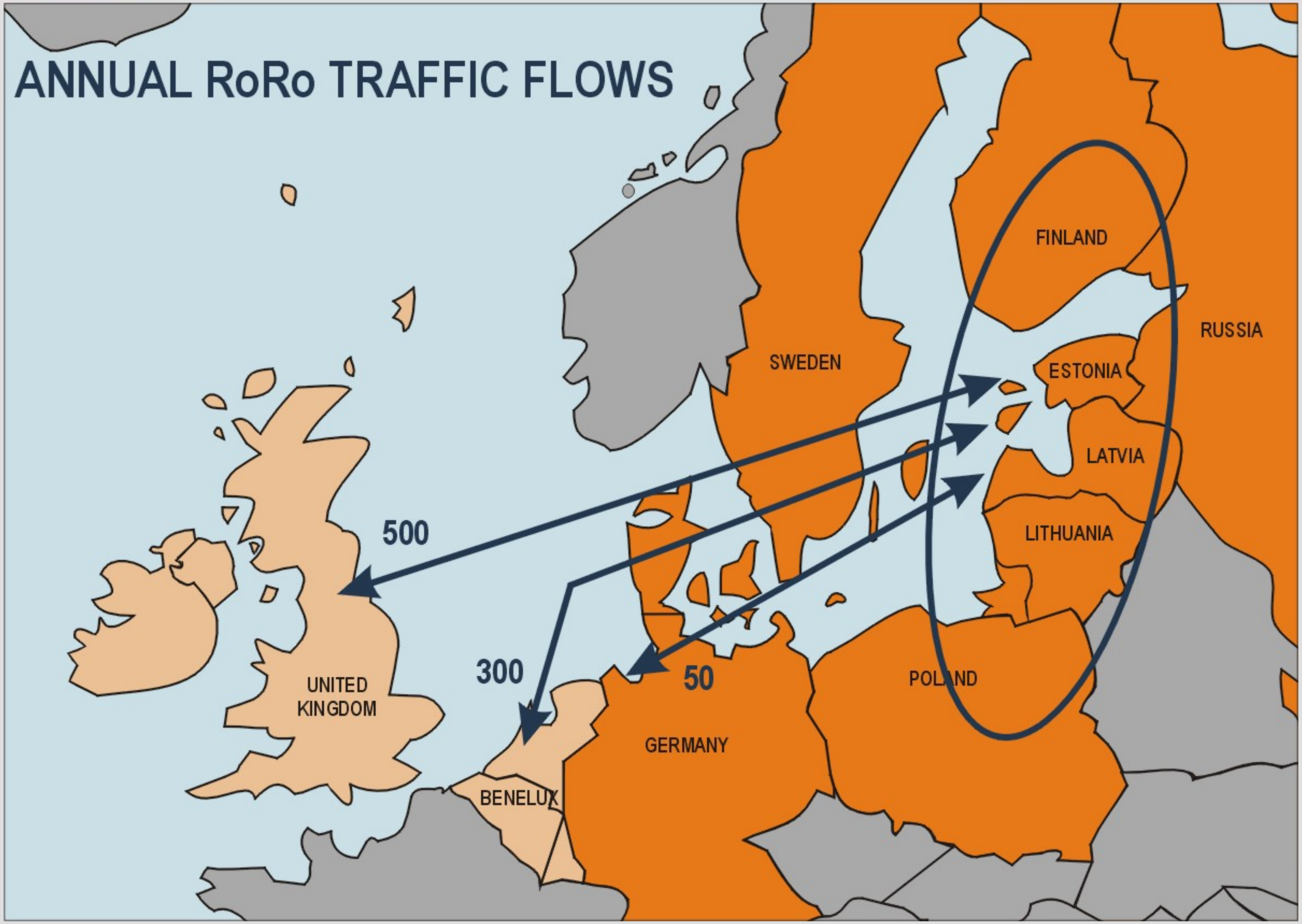
TRAFFIC FLOWS

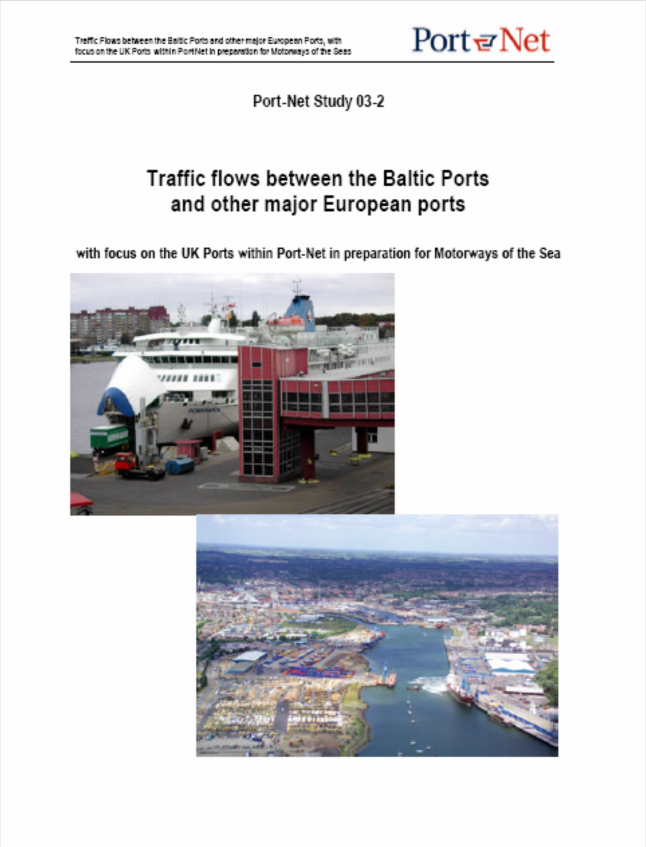
OUTER BALTIC RO-RO SHIPPING LINES



Port-Net Study 03-2

Traffic flows between the Baltic Ports and other major European ports with focus on the UK Ports within Port-Net in preparation for Motorways of the Seas

- **Maciej Matczak**, Ph.D. – Project leader and coordinator, Senior lecturer at the Gdynia Maritime Academy, Senior consultant, Actia Consulting/Actia Forum Ltd.
- **Bogdan Ołdakowski** – Project manager, CEO, Actia Forum Ltd.
- **Andrzej S. Grzelakowski**, Prof. – Head of Department of the Development and Management of Sea Ports at the Gdynia Maritime Academy
- **Krzysztof Urbaś** – Development Director, Port of Gdansk Authority SA,
- **Marek Błuś** – Master mariner, lecturer, maritime expert and writer, journalist.


Traffic Flows between the Baltic Ports and other major European Ports, with focus on the UK Ports within PortNet in preparation for Motorways of the Seas

Port-Net

Port-Net Study 03-2

Traffic flows between the Baltic Ports and other major European ports

with focus on the UK Ports within Port-Net in preparation for Motorways of the Sea

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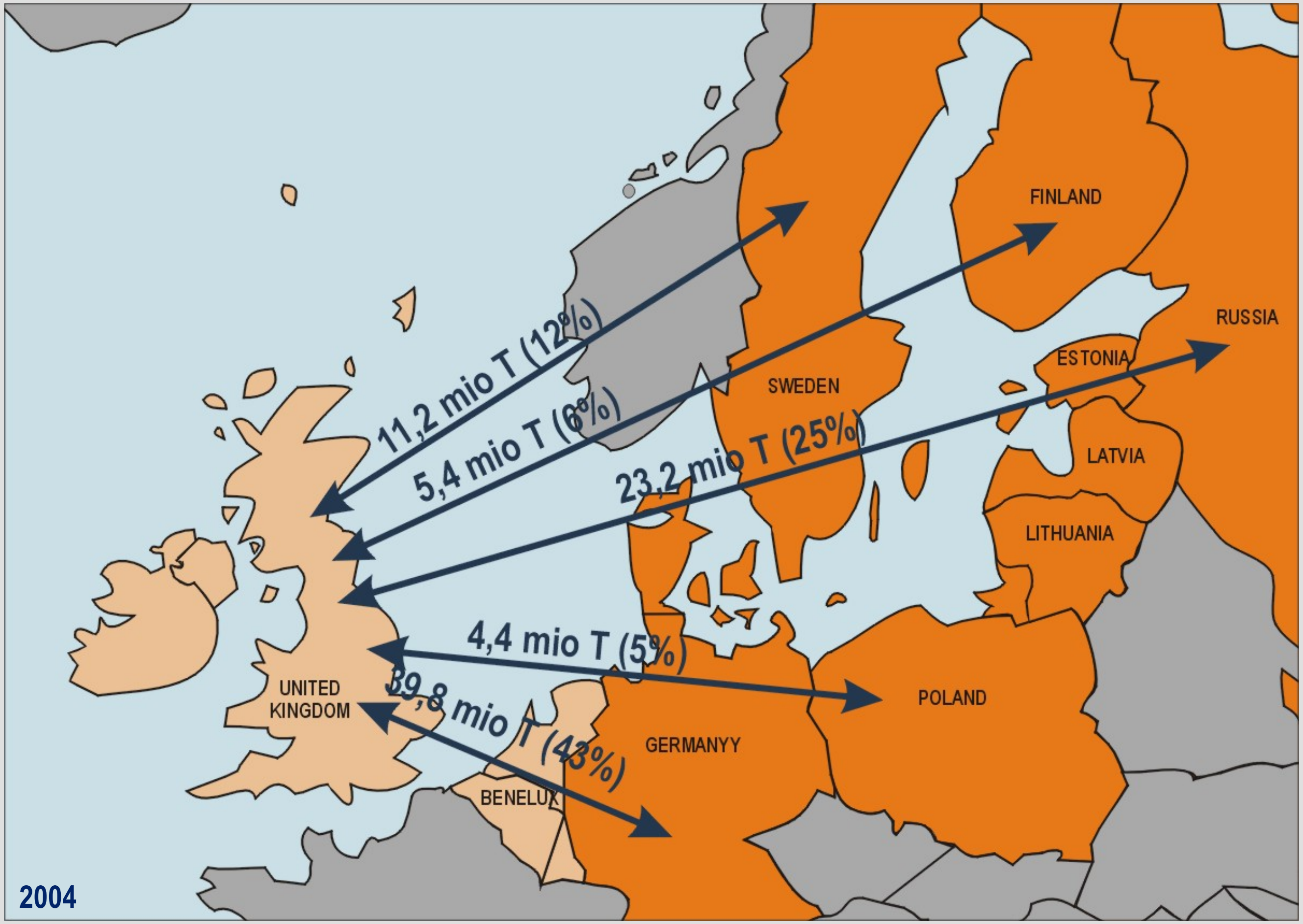
BSR - UK
EXTERNAL EXCHANGE



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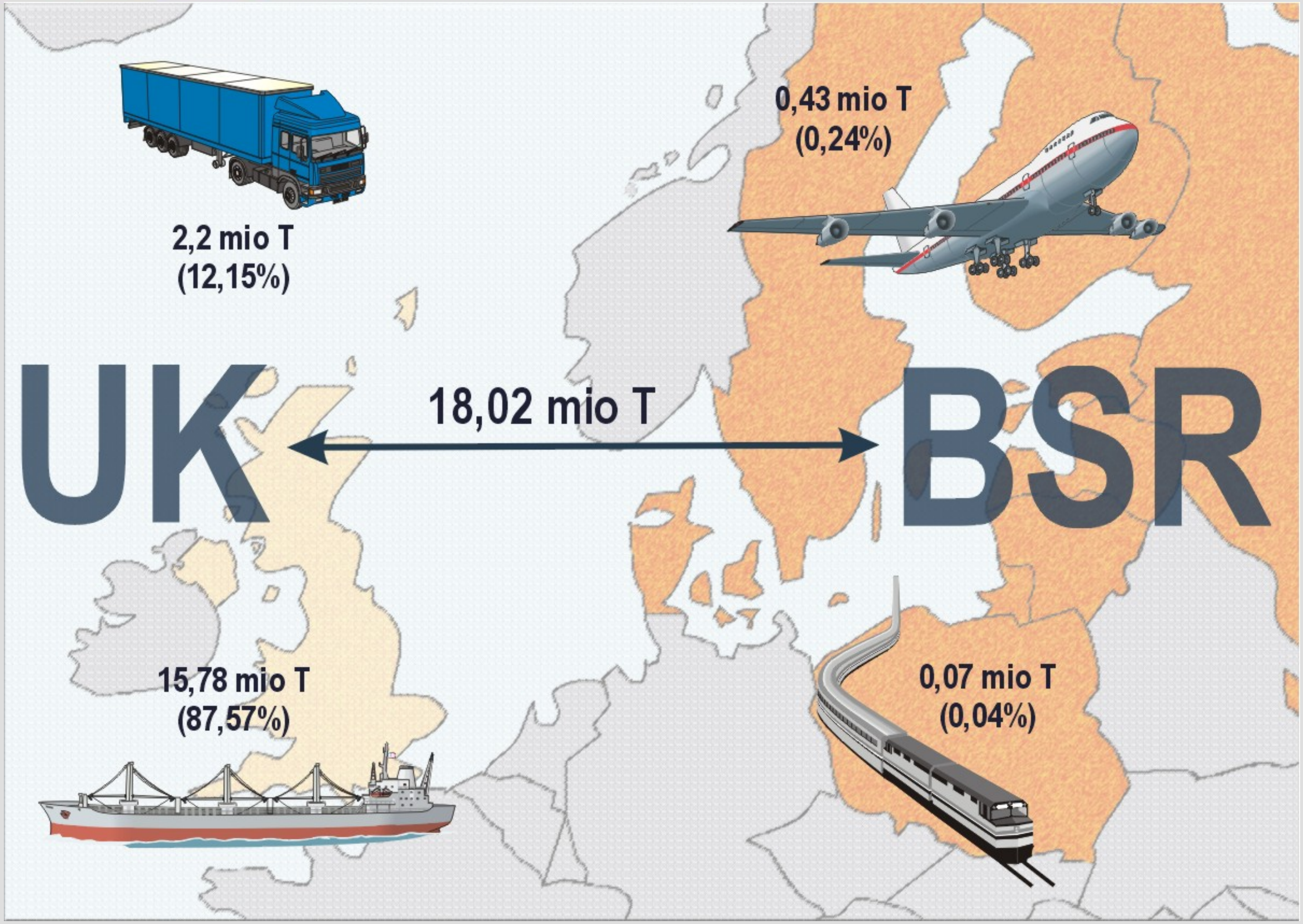
BSR - UK

EXTERNAL EXCHANGE BY MODE OF TRANSPORT



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BSR - UK
RECOMENDATIONS

- Dominant position of the maritime transport in the BRS – UK cargo exchange (87,57%).
- Alternative /competitive/ to maritime routs, transport connections on BSR – UK relation /beside Germany exchange/ currently do not play an important role and will not in the future.
- Short Sea Shipping and Motorways of the sea development will improve competitive position of the maritime transport in the BSR exchange.
- MoS will take advantage of the TEN-T development but do not cause cargo shifting ‘from road to sea’.
- Traffic flows and cargo exchange concentration indicated the probably MoS routs on the Baltic.
- Quality of hinterland connections is the key incentive in the ports future development.
- Underdevelopment of the hinterland transport infrastructure as the main obstacle of the land /rail – road/ and maritime carriage.

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SUMMARY

- Rapid development of the Baltic Countries economy up to 11.9%;
- Increase of the foreign trade value (+ 8.6%) and volume (+ 5.2%) in the BSR countries;
- Growth of the average value of one tone in the foreign trade: export + 3.3% and import + 2.3%;
- Growth of the containerization importance in the serving of **THE OUTER Baltic** foreign trade in the Region;
- Importance increase of the RoRo traffic in the serving **THE INTRA Baltic** foreign trade;
- Increase of the container and RoRo vessels capacity on the Baltic;
- Significant development of the Baltic container seaports throughput of about + 16.2% in 2006.
- Mediterranean – Baltic regular maritime connection more realistic in the future (MoS??);

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Area of interest:

- Transport;
- Management and environmental protection;
- Tourist;
- Regional development;
- European project management and preparation.

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