



NAPA
North Adriatic Ports Association

Connectivity of the Baltic Sea and Mediterranean

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Luka Koper, d.d.

Cyprus, 6th of September 2012



- NAPA performance
- NAPA geographical position and opportunities
- Maritime and inland connections (and their advantages)
- Development plans

Background and milestones



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February 2009 Letter of Intent for collaboration

March 2010 Registration of NAPA as an independent entity

June 2010 First presentation at the T&L China exhibition

November 2010 Port of Rijeka joined NAPA

May 2011 The first exhibition of NAPA in Europe on T&L Muenchen

October 2011 NAPA ports included in the "Core ports" of the TEN-T "core network"

January 2012 Presentation of MDS Transmodal study to the European Commission

February 2012 Presentation at the logistic exhibition SITL India in Mumbai

June 2012 Second participation at the T&L China exhibition

Running ITS Multiport Adriatic Gateway / TEN-T project

Running SAFEPORT / Cross -border cooperation Slovenia – Italy

Running INWAPO / Central Europe programme

Why NAPA?



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- **Geographic position** of North Adriatic (especially for Far East markets via Suez Canal)
- **Alternative** to North European ports
- **Reducing** inland infrastructures burden
- **Balancing** regional development (North–South)
- Reducing **environmental** impact
- **Global market** conditions (reallocation of existing flows of goods, new businesses)

NAPA'S key principle: "Coopetition"
"Cooperate internationally – compete internally"

Objectives of NAPA



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- **Commercial:** attracting more cargo to Europe via Adriatic Ports (southern gateway)
- **Institutional:** developing suitable public transport infrastructure (priorities for Trans European Transport Network / corridors) to support bigger volumes and efficient services

European benchmark

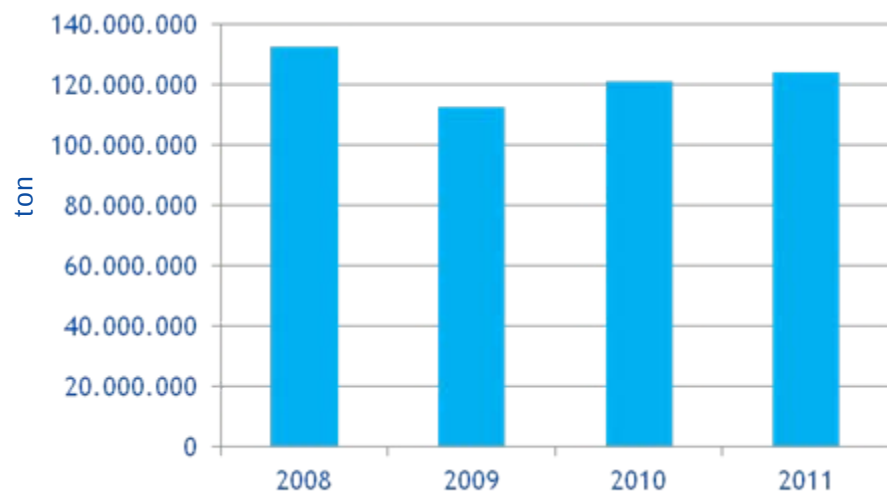


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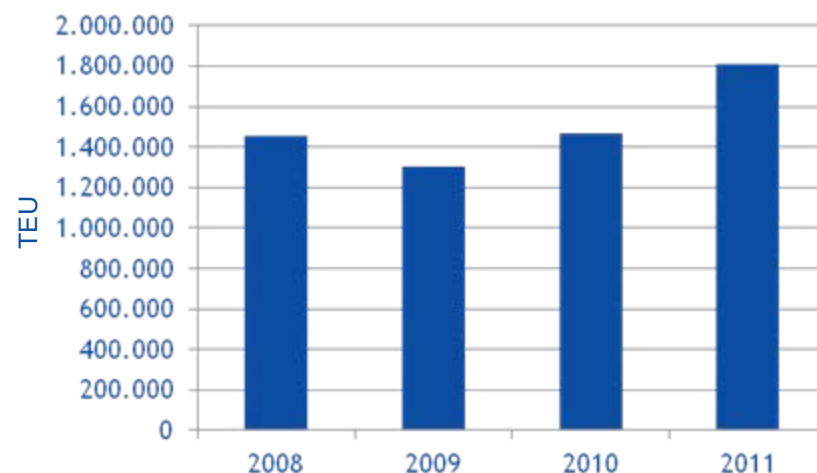
	Total throughput in million tonnes (2011)	Index 11/10
Rotterdam	434,0	+1,0%
Antwerp	187,1	+5,0%
Hamburg	132,2	+9,1%
NAPA ports	124,2	+3,6%
Marseille	88,2	+2,4%
Bremen	80,5	+17,3%

	Container throughput in million TEU (2011)	Index 11/10
	11.8	+6,5%
	8.6	+2,3%
	9.0	+14,2
NAPA ports	1.8	+22,4%
	0.9	-1,0%
	5.9	+21,0%

Total throughput of NAPA ports in tonnes



Container throughput of NAPA ports in TEU

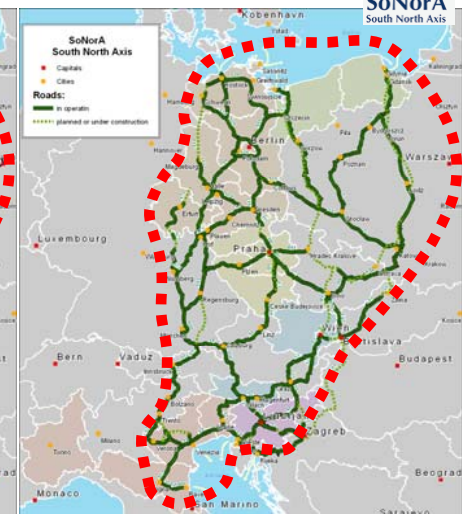
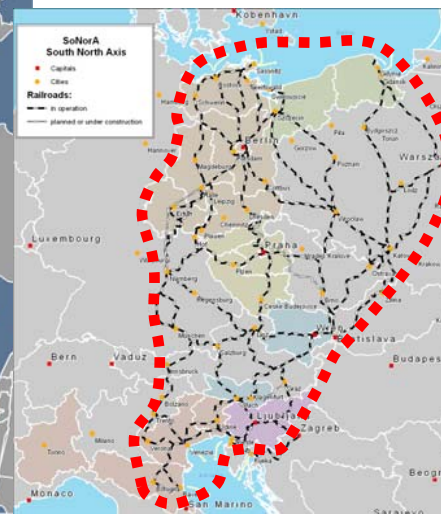
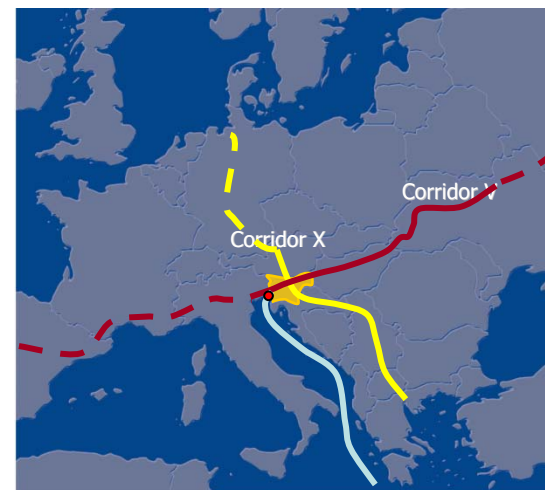
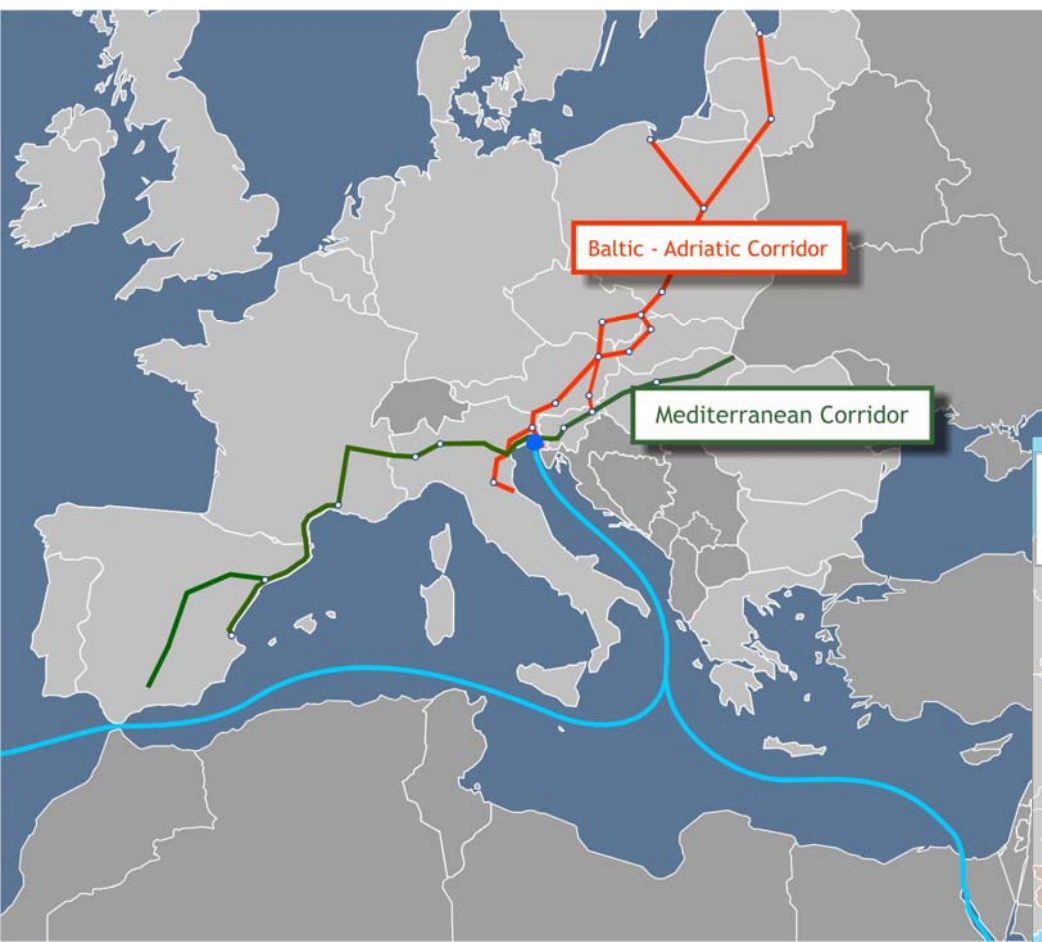


TEN-T regulation proposal and other corridors



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- new opportunities along the Adriatic-Baltic corridor markets (South – North route)
- intensifying our position on the Mediterranean corridor (East – West route)

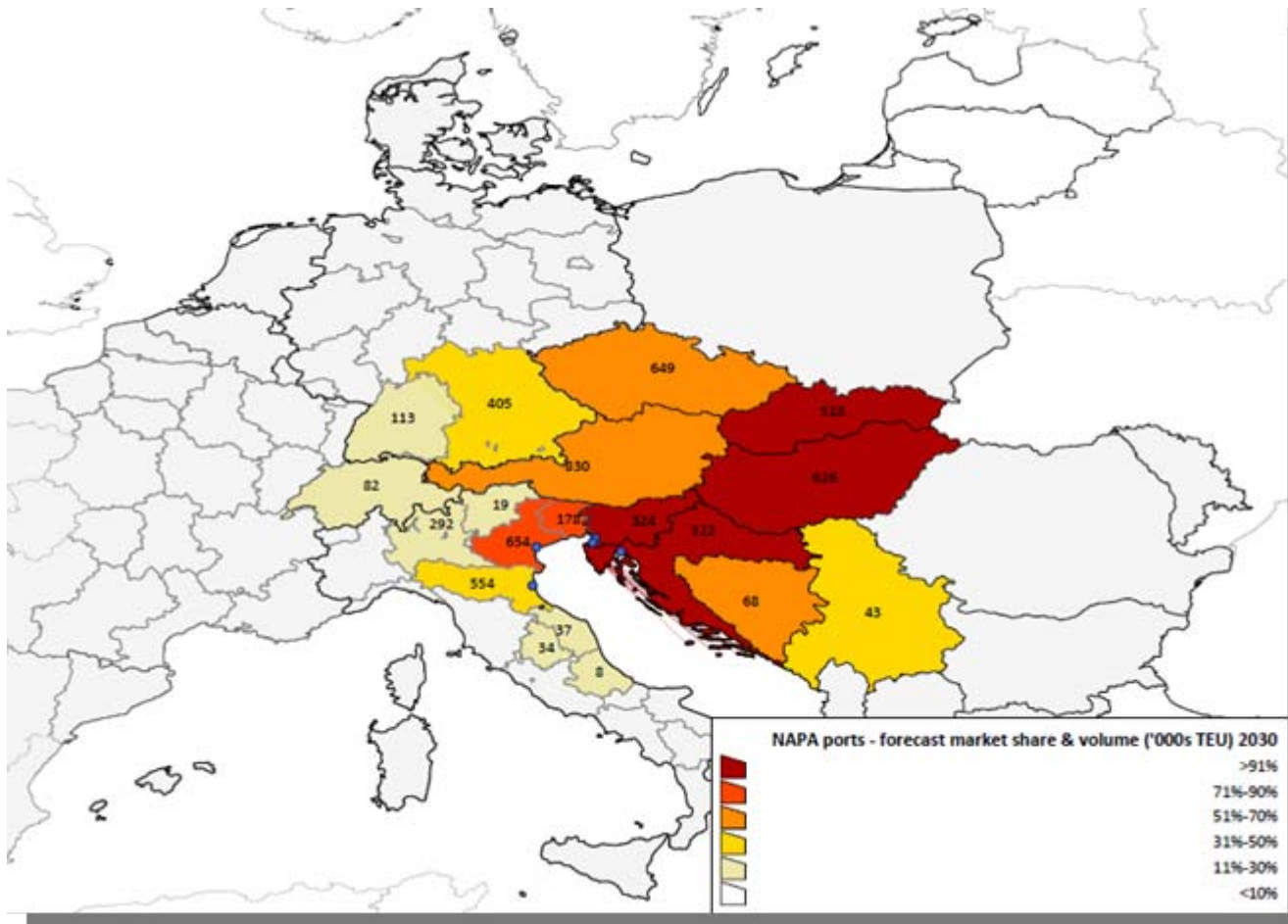


Container market potential of NAPA ports



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- The result of a dedicated Market Study (TEN-T ITS project; MDS Transmodal):
NAPA potential by 2030 is 6 million TEUs



Enlarging our market potentials



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- new opportunities along the Adriatic-Baltic corridor markets
- potential cargo volumes to/from Baltic ports

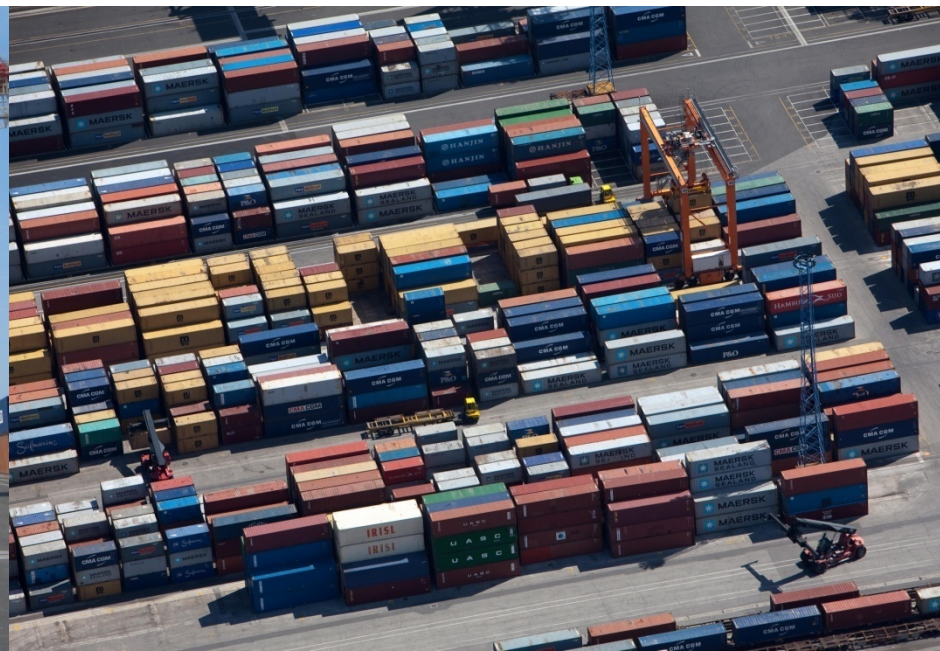
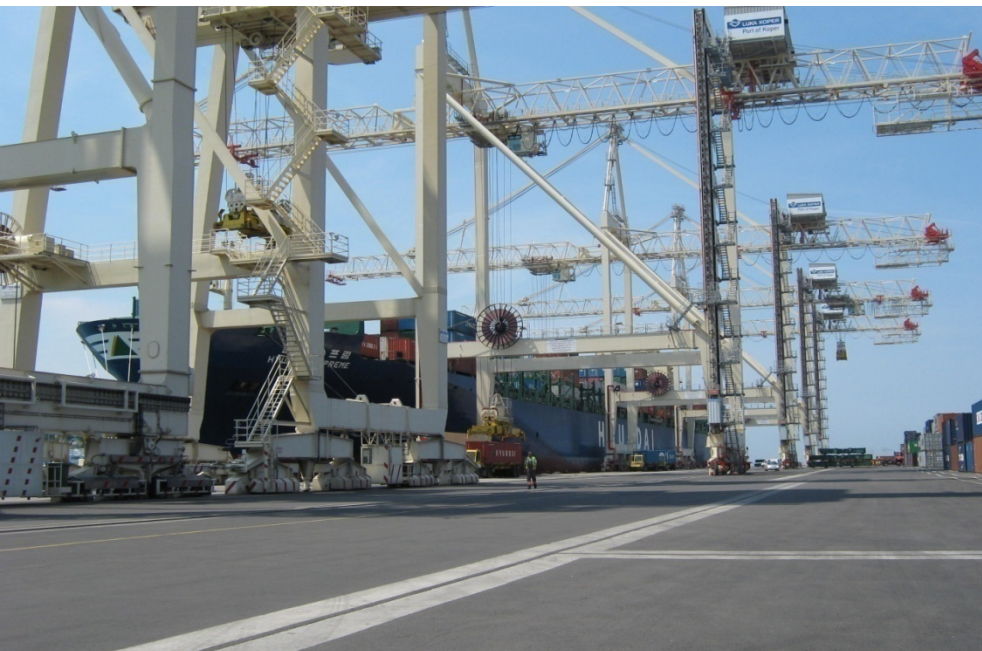


Regular container services



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Region to/from	Frequency	Ports of call
Far East	Weekly service	Major Far East and SE Asian ports
Intra-Mediterranean	Weekly service	Major ports in eastern Mediterranean, Turkey, Greece and South Italy
Feeder	Weekly service	All major hubs in the Mediterranean



Direct container service "Phoneician Express"



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FLEET DEPLOYED

- CMA CGM BALZAC 6447 TEU
- CMA CGM BERLIOZ 6627 TEU
- CMA CGM FLAUBERT 6966 TEU
- CMA CGM RAVEL 6712 TEU
- CMA CGM VOLTAIRE 6456 TEU
- SAFMARINE KARIBA 6200 TEU
- SAFMARINE KOMATI 6200 TEU
- MAERSK KARACHI 6690 TEU
- MAERSK KYRENIA 6788 TEU

KOPER

PORT SAID (EAST)

PUSAN

SHANGHAI

CHIWAN

HONG KONG

PORT KLANG

SINGAPORE

TANJUNG PELEPAS

WEST BOUND

FROM	TO	T/T (DAYS)
SHANGHAI	NAPA	28
PUSAN		26
CHIWAN		23
HONG KONG		22
TANJUNG PELEPAS		18
PORT KLANG		16

EAST BOUND

FROM	TO	T/T (DAYS)
NAPA	PORT KLANG	23
	SINGAPORE	24
	SHANGHAI	32
	PUSAN	34

WEST BOUND
EAST BOUND

Direct container service "ADN"



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FLEET DEPLOYED

- Ital Universo
- Ever Urban
- Ever Unison
- Ital Unica
- Ever United
- Ever Useful
- Ever Uranus
- Ever Union
- Ever Ultra
- Ever Uberty
- Ital Usodimare
- Ever Ursula



WEST BOUND

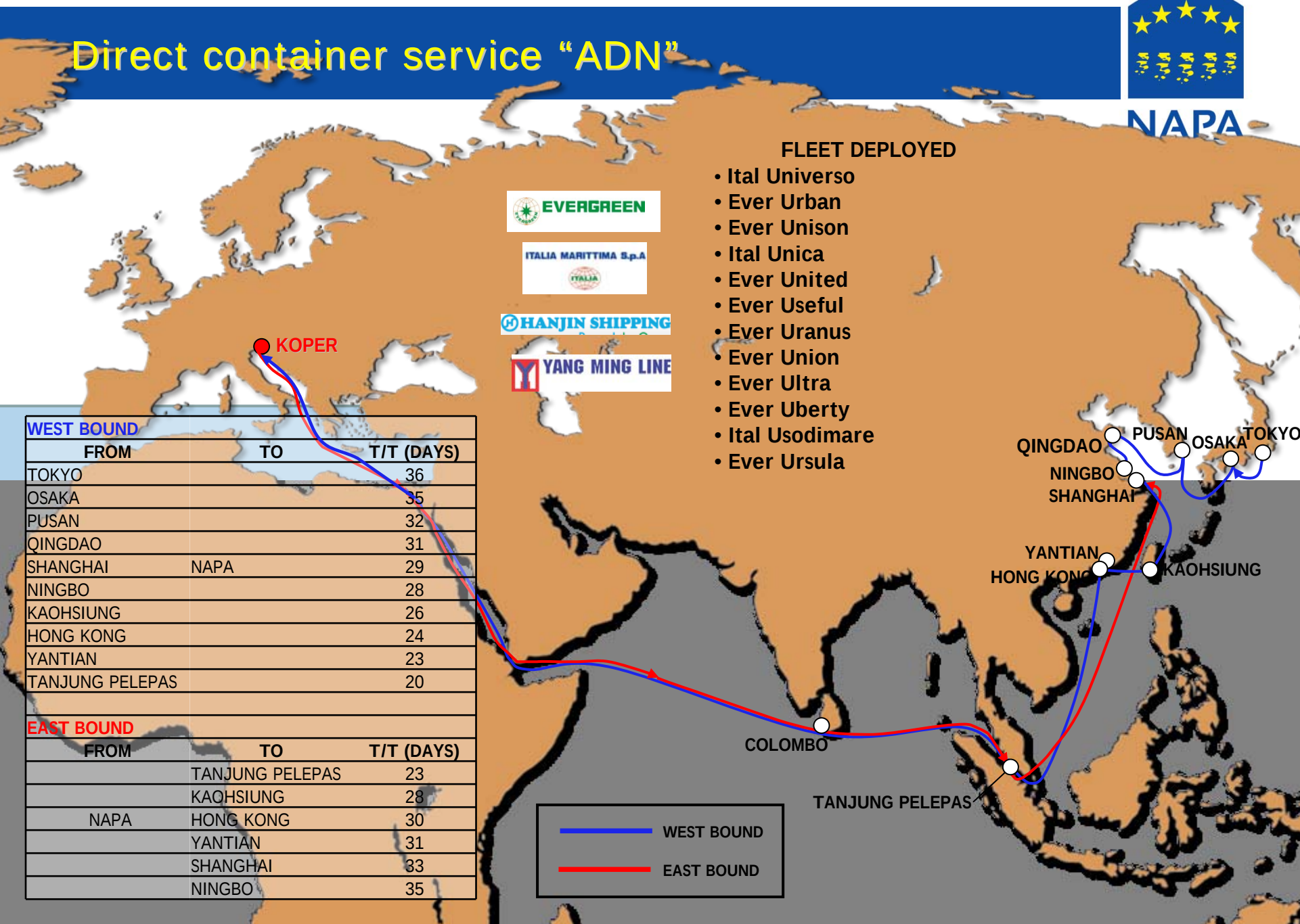
FROM	TO	T/T (DAYS)
TOKYO		36
OSAKA		35
PUSAN		32
QINGDAO		31
SHANGHAI	NAPA	29
NINGBO		28
KAOHSIUNG		26
HONG KONG		24
YANTIAN		23
TANJUNG PELEPAS		20

EAST BOUND

FROM	TO	T/T (DAYS)
	TANJUNG PELEPAS	23
	KAOHSIUNG	28
NAPA	HONG KONG	30
	YANTIAN	31
	SHANGHAI	33
	NINGBO	35

WEST BOUND

EAST BOUND



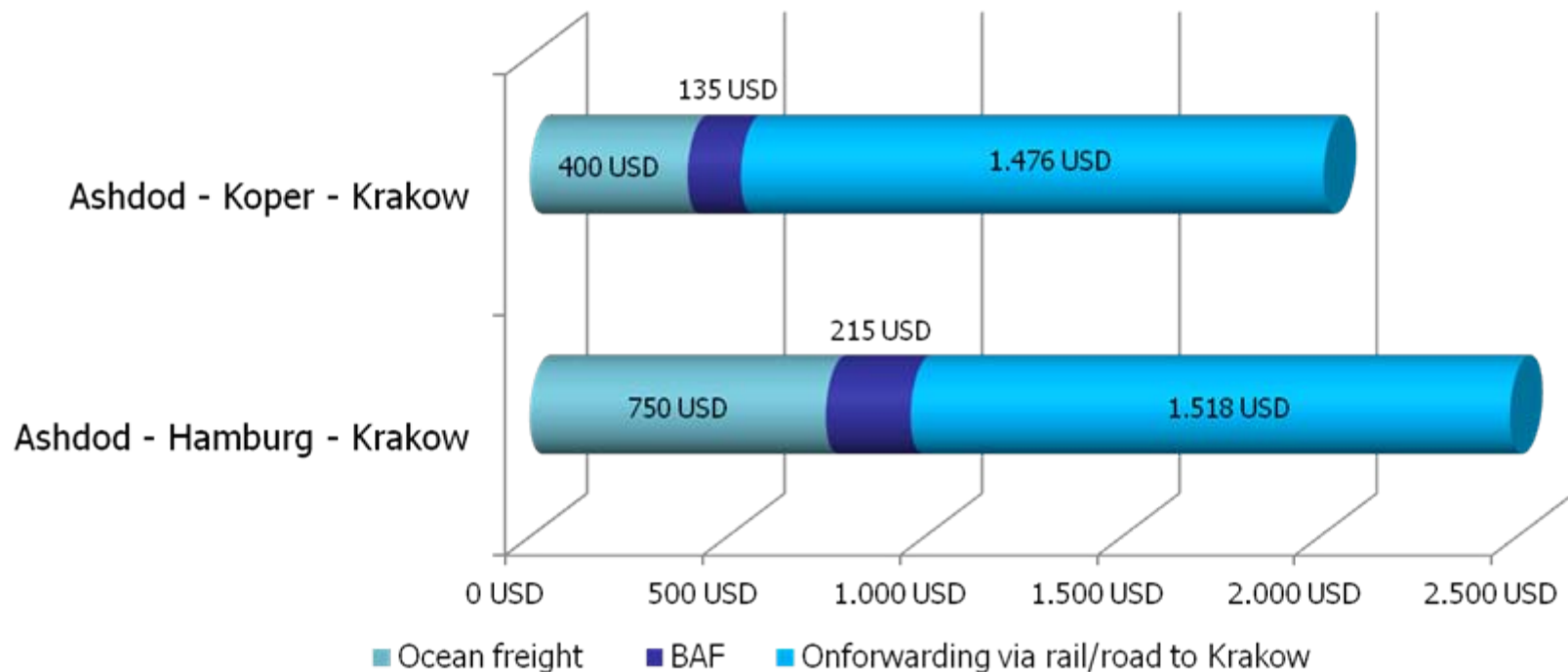


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Cost comparison

Important:

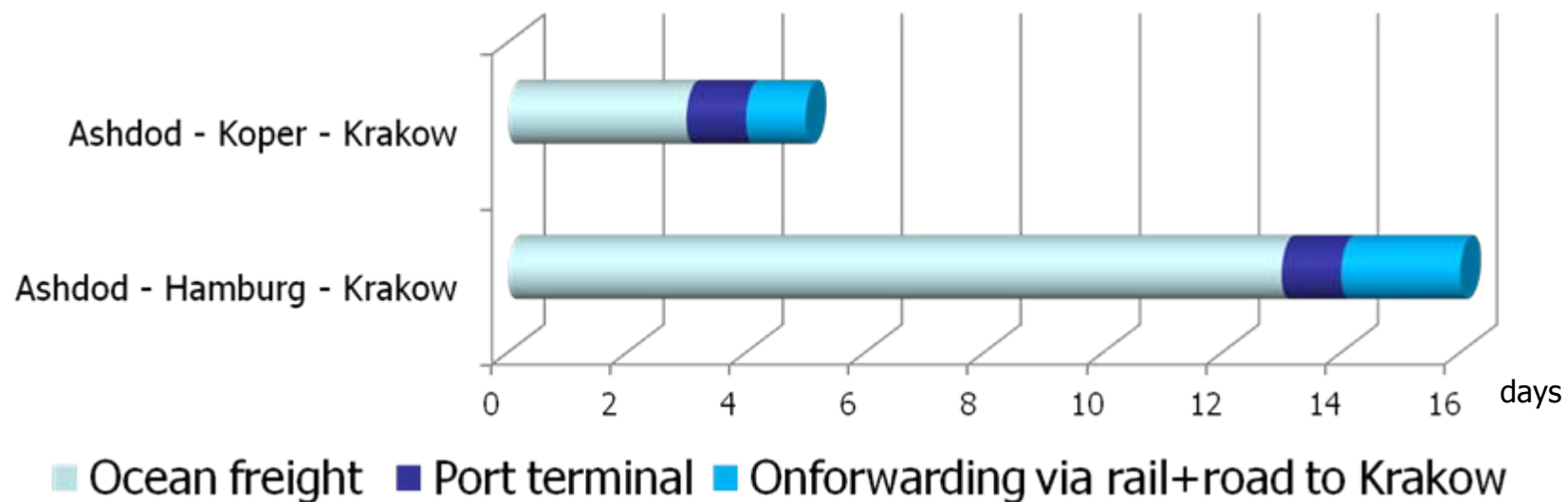
- Costs do not include THC, ISPS fee, doc fee, release fee
- Calculations are based on offers made at the end October 2011





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Transit time comparison

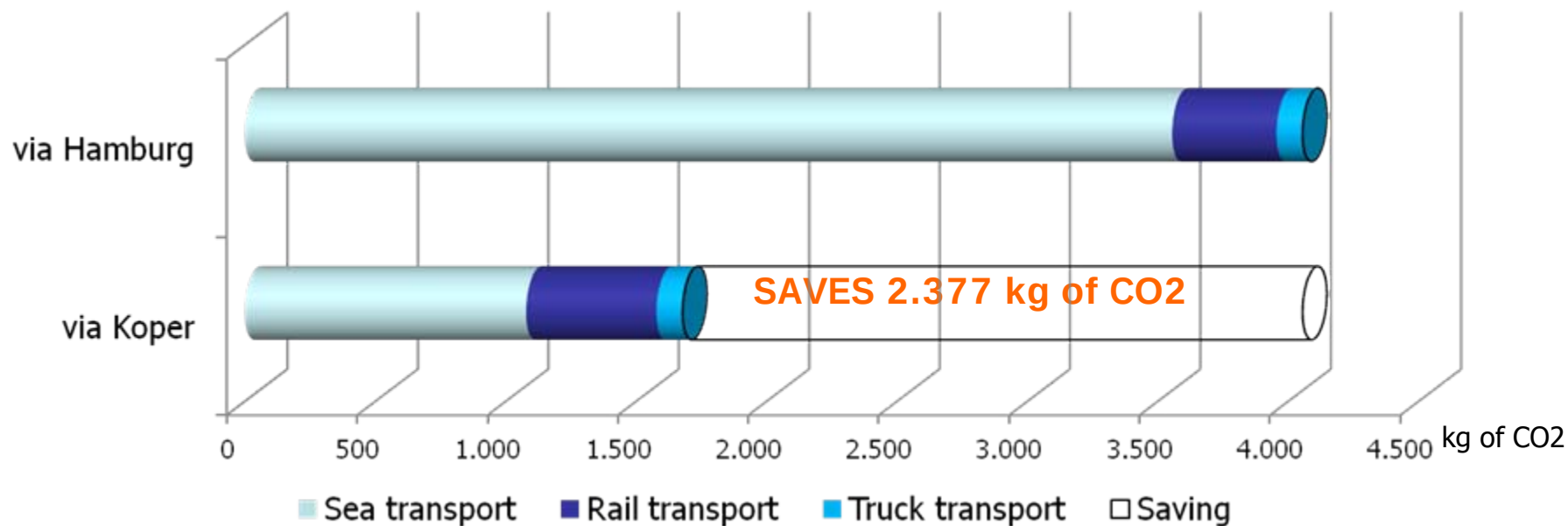


- by rail to Dobrowa Gornicza
- from Dobrowa Gornicza to Krakow by truck (90 km)



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CO2 emissions comparison



Source:
www.ecotransit.com
www.csx.com

Regular container train connections (ex. Koper)



SLOVENIA	Koper - Ljubljana/Maribor (Adria Kombi)	2-3 trains/day
GERMANY	Koper - Ljubljana - München (Adria Kombi)	up to 2 trains/day
CZECH REP	Koper - Vratimov (Adria Kombi)	3 trains/week
	Koper - Dobra u Fridku Mystku (Adria Kombi)	4 trains/week
	Koper - Vratimov (Adria Transport/AWT)	1 train/week
	Koper - Various destinations (Mettrans)	on demand
	Koper - Pascov (AWT)	1 train/week
HUNGARY	Koper - Budapest BILK (Adria Kombi)	7 trains/week
	Koper - Budaors - Koper (Integrail/Navismart)	3 trains/week
	Koper - Budapest (ARGO)	2 trains/week
	Koper - Budapest (Mettrans)	7 trains/week
SLOVAKIA	Koper - Žilina (Adria Kombi) - KIA dedicated	7 trains/week
	Koper - Bratislava (Adria Kombi)	4 trains/week
	Koper - Dunajska Streda and other destinations (Mettrans)	up to 21 trains/week
SERBIA	Koper - Ljubljana - Belgrade (Adria Kombi)	up to 2 trains/day
CROATIA	Koper - Zagreb (Adria Kombi)	up to 2 trains/day
AUSTRIA	Koper - Graz - Koper (Adria Transport)	4 trains/week (up to 5 trains/week)
	Koper - Graz area - Koper (Adria Kombi)	single wagons or trucks from Maribor onwards
	Koper - Villach CAPRIS (Adria Kombi, RCA Intermodal)	3 trains/week
	Koper - Villach - Koper (IM, Adria Kombi, DBSR...)	5 times week/single wagon servis
POLAND	Koper - Vienna - Dabrowa Gornicza (Baltic Rail)	2 trains/week
BOLGARIA	Koper - Ljubljana - Sofia (Adria Kombi)	1 train/week
ROMANIA	Koper - Arad - Koper (Adria Transport)	depending on demand
ITALY	Koper - Padova (Adria Kombi)	1 train/week

All other destinations are covered with daily single wagon service; Ratio between rail/truck: 60% rail, 40% truck (2011)

Adriatic train Koper – Graz – Vienna – Katowice and vice versa

Terminal	Arrival time	Departure time Cut off time	Terminal	Arrival time	Departure time Cut off time
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Northbound 1

Port of Koper		Thursday 22:00 Wednesday 17:00	Katowice		Monday 22:00 Monday 17:00
Cargo Center Graz	Friday 05:00	Friday 10:00 Thursday 17:00	Vienna Freudenau	Tuesday 16:00	Tuesday 21:00 Tuesday 16:00
Vienna Freudenau	Friday 16:00	Friday 21:00 Friday 16:00	Cargo Center Graz	Wednesday 5:00	Wednesday 9:00 Tuesday 17:00
Katowice	Saturday 12:00		Port of Koper	Wednesday 21:00	

Northbound 2

Port of Koper		Sunday 22:00 Saturday 17:00	Katowice		Friday 13:00 Friday 10:00
Vienna Freudenau	Monday 15:00	Monday 21:00 Monday 16:00	Vienna Freudenau	Saturday 06:00	Saturday 11:00 Friday 17:00
Katowice	Tuesday 12:00		Port of Koper	Sunday 03:00	

Baltic train Katowice – Gdynia and vice versa

Terminal	Arrival time	Departure time Cut off time	Terminal	Arrival time	Departure time Cut off time
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Northbound 1

Katowice		Monday 12:00* Saturday 12:00*	Gdynia BCT / GCT		Tuesday 12:00* Monday 17:00*
Gdynia BCT / GCT	Tuesday 08:00*		Katowice	Wednesday 8:00*	

Northbound 2

Katowice		Wednesday 12:00*	Gdynia		Thursday 12:00*
Gdynia	Thursday 08:00*		Katowice	Friday 08:00*	

Northbound 3

Katowice		Friday 12:00*	Gdynia		Saturday 12:00*
Gdynia	Saturday 08:00*		Katowice	Sunday 08:00*	

* Baltic train calls 3 different terminals in Katowice area. Please check from the booking office exact departure and cut-off time, which may vary depending on the terminal

Booking form to be downloaded from <http://www.balticrail.com/BalticRail-booking-form.doc>

Filled booking form to be sent to booking@BalticRail.com

Contact and booking information by e-mail or by phones +372 66 131 18 or +48 32 750 15 61

More info at <http://www.balticrail.com/Koper-Vienna-Katowice-Gdynia.html>



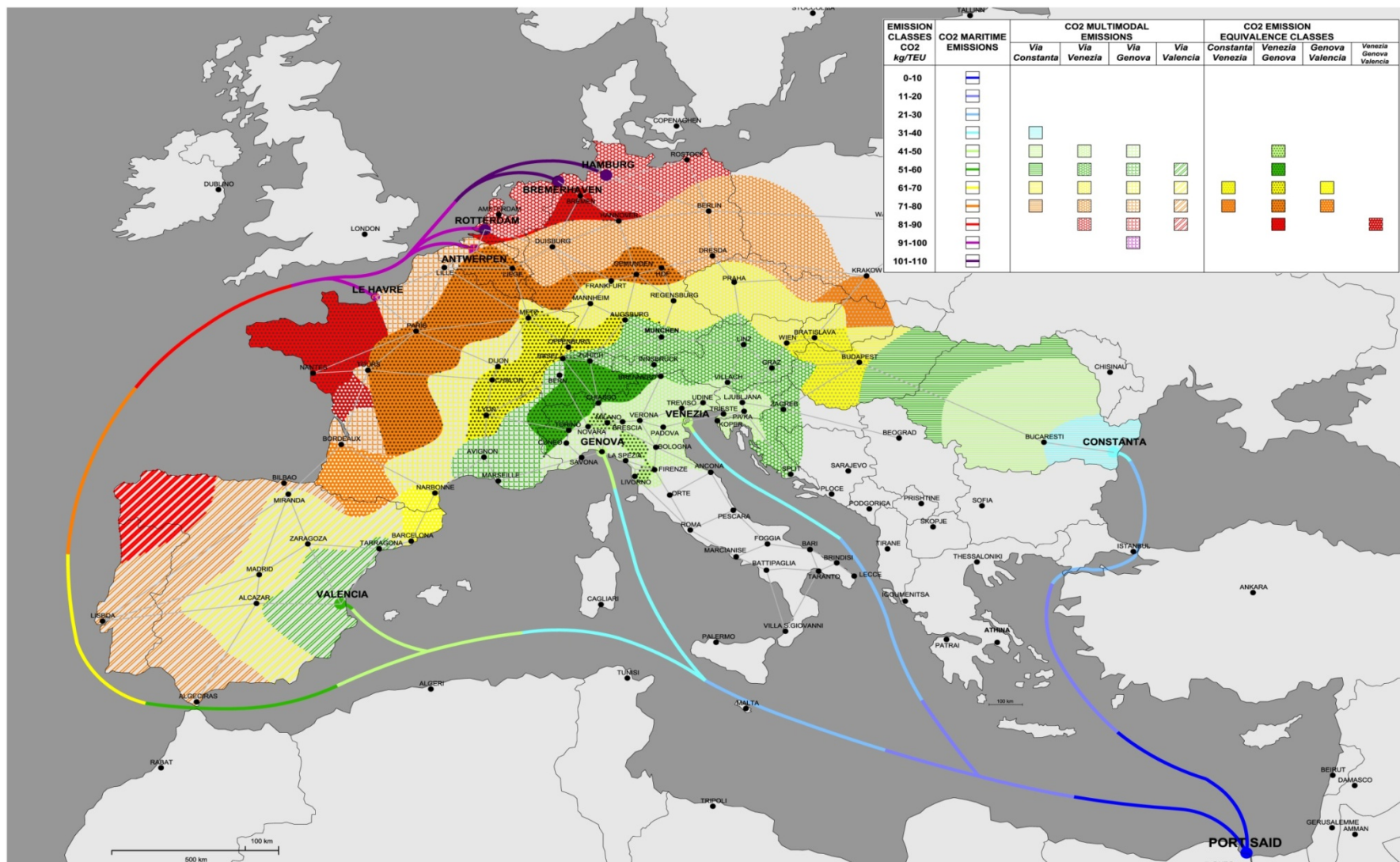
International sales and booking office

Phone: +372 6613129

Mobile: +372 52 50 287

info@BalticRail.com

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Investment plans

KOPER

- extension of pier 1 and 2,
- new pier 3,
- distribution centre,
- new main gate,
- new railway track.



- | | | |
|--|---|--|
|  Container and RO-RO Terminal |  Fruit Terminal |  European Energy Terminal |
|  Car Terminal |  Timber Terminal |  Passenger Terminal |
|  General Cargoes Terminal |  Dry Bulk Terminal |  Liquid Cargoes Terminal |
|  Quays and Moorings | | |



ADDITIONAL 400 HECTARES OF PORT AREA

Investment plans

RAVENNA

- deepening of canal bed,
- new container terminal,
- strengthening road and rail.



Terminals and Port Companies

Coastal Depots

Cruise Terminal

Shipyards and Offshore Industries

Available Areas



NEW RAVENNA CONTAINER TERMINAL

Investment plans

VENICE

- new Ro-Ro terminal,
- new container terminal,
- new off-shore container terminal,
- strengthening of railway network.



- | | |
|---|---|
|  Industrial port |  Oil Terminal |
|  Commercial terminals |  New Motorways of the Sea Terminal |
|  New Container Terminal |  Passenger Port |



THE VENICE CONTAINER OFFSHORE TERMINAL

Investment plans

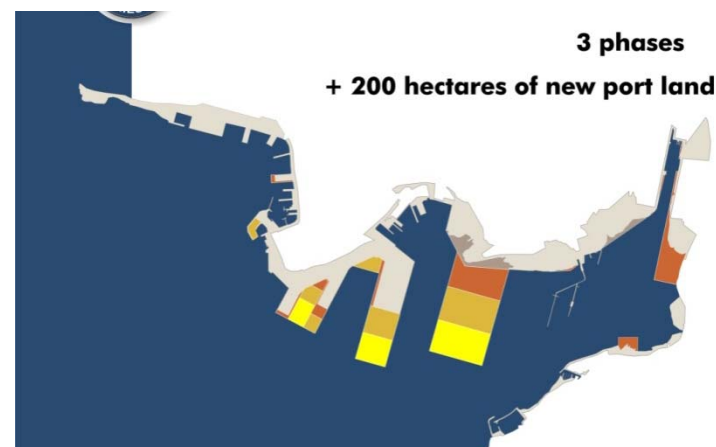


TRIESTE

- logistic platform,
- piers extension,
- new container and Ro-Ro terminals.



New Port Masterplan	Fruit Terminal	Oil Terminal
Multipurpose Terminal	General Cargo Terminal	Cement Terminal
RO-RO Ferry Berth	Cereal Terminal	Manufactured Products Tern
Pier Terminal	Pier Container Terminal	Chemical Terminal
Passenger Terminal	San Marco Shipyard	Frozen Products Terminal
RO-RO Ferry Terminal	Siot Pipeline Terminal	Refined Products Terminal



- 1st phase
- 2nd phase
- 3rd phase

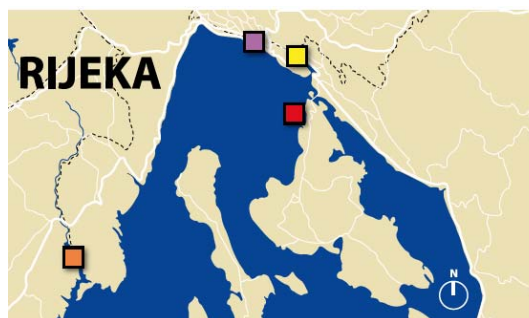
Investment plans



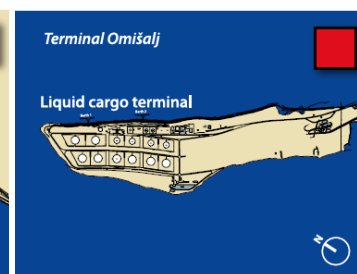
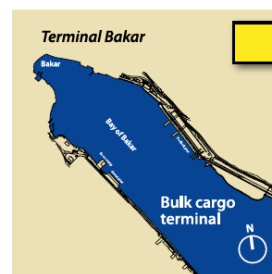
LUČKA UPRAVA RIJEKA
PORT OF RIJEKA AUTHORITY

RIJEKA

- enlargement of the existent container terminal,
- new container terminal,
- investments in rail infrastructure.



- Container terminal
General cargo
Silo terminal
Passenger port
New waterfront
New container terminal
- Bulk cargo terminal
- Liquid cargo terminal
- Livestock terminal
Timber terminal





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Thank you for your attention!