

The European Union's TRACECA programme

for Azerbaijan, Georgia, Kazakhstan, Turkmenistan and Ukraine

Motorways of the Sea for the Black Sea and the Caspian Sea

MoS MARKET APPROACH July 2010



This project is funded by
the European Union

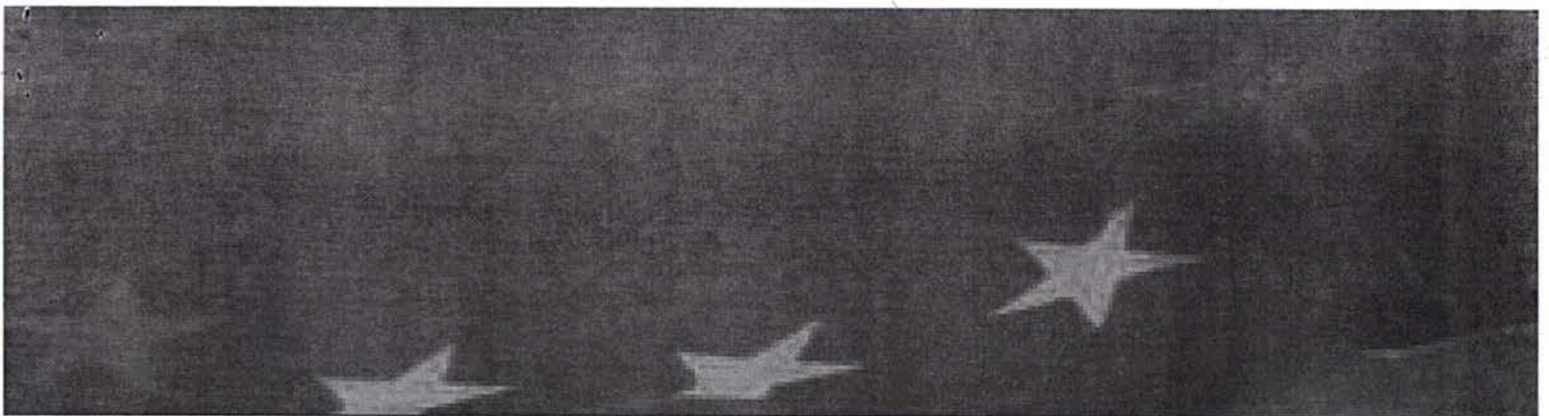


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The European Union's TRACECA programme

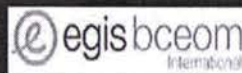
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Table of contents

1. Market identification	4
1.1 The three different transport techniques: rail, ro-ro and container	4
1.2 Geographical scope: bilateral, regional and transit trades	5
1.3 Customers' base : who are the decision-makers ?	5
1.4 Target Volumes	5
2. The supply approach	5
2.1 The specific case of the rail-ferries	6
2.2 The Ro-ro demand	6
2.3 Container: a glance into the crystal ball	7
3. - Users' views on TRACECA and competing corridors	8
3.1 The Northern Corridor:	8
3.2 The Southern (purely road) Corridor:	8
3.3 The Chinese (purely rail) Corridor (Qingdao-Dostyk) for containers:	9
3.4 The TRACECA Corridor:	9
3.5 What opportunities for TRACECA corridor?	10
4. Attracting the users to the TRACECA corridor by:	11
4.1 Changing users' perception	11
4.2 Meeting users' requirements	11
Annex 1: Northern, Central and South corridors	13
Annex 2: Existing maritime services in the Black and the Caspian Seas	15
Annex 3: Example of situation of Caspar railferry fleet (07/07/2010)	16
Annex 4: Door-to-door prices	18
Annex 5: Maritime services	19

With the aim to develop sustainable transport services and attract more cargo flow along the TRACECA corridor based on the MoS initiatives, the MoS Market Approach targets those users routing today their cargo via alternative transport corridors. Converting the MoS concept into a workable and accessible commercial tool, evolving in the course of time with the progress and development of TRACECA, is the means chosen by the Black Sea and Caspian Sea MoS Project to fulfill its task.

1. Market identification

1.1 The three different transport techniques: rail, ro-ro and container

- The countries under review have a deeply rooted 'rail transport' culture corresponding to geographical facts: they are big (Kazakhstan alone is as big as all Western Europe), wide apart from each other, rather low-populated, with considerable distances between human settlements as well as between production and consumption areas, and they mainly produce a large range of raw or semi-finished industrial and agricultural materials in huge volumes. Further, they are separated by two seas.
This explains why the railferry technique is not only very much alive in this part of the world - while it nearly disappeared anywhere else – but even flourishing. Considerable investments have already been made or are planned with States support to improve the existing railferry links and open new ones from North to South across the Black Sea (Derince-Illyichevsk, Kerch-Poti, Kavkaz-Varna, Kavkaz-Poti, Kavkaz-Samsun) for serving Russia as well as Central Asian markets.
- Dedicated Roro operations fitted for commercial road trucks and trailers in both the Black Sea and the Caspian Sea are very few and there is none, at the moment, along the TRACECA Corridor. Existing services link Turkish ports (Trabzon, Samsun, Zonguldak) with Russia (Sochi, Novorossiysk) and Ukraine (Skadovsk), Bulgaria (Burgas) with Georgia (Poti) and Russia (Novorossiysk). Rolling cargo (consisting mostly in accompanied TIR trucks) are loaded on the Black Sea railferries as complementary cargo only depending on the space available. The same applies to the Caspian Sea liner services.
- There is a huge containerized trade into and out of the Black Sea proceeding from or destined to the Far-East, Europe, the Americas or the rest of the world. However the flow along the TRACECA Corridor is next to nil and remains de facto limited to bilateral direct trade. The modern container culture, with door to door deliveries and transit/transshipment combinations, is painfully nascent in this part of the world with limited exceptions only.

1.2 Geographical scope: bilateral, regional and transit trades

In broad terms and in principle, the marketing geographical area encompasses the whole Euro-Asian continent. In actual facts it covers:

- The European Union as a whole on the Western side, with a focus on Eastern and Central European countries as traditional trade partners of the TRACECA countries.
- Scandinavia, the Baltic States and Belarus as markets with a potential easy access to the TRACECA Corridor via the Viking train.
- The MoS project beneficiary countries plus all the landlocked countries (Armenia and the other 'stan' including Afghanistan) which can be accessed only or mainly through the MoS project beneficiary countries.

1.3 Customers' base : who are the decision-makers ?

- For all cargoes, including cargo in railwagons (wholly) and heavylifts, containers, trucks and rolling cargo (partly): Freight Forwarders and big Shippers (large commercial traders and/or industrial companies).
- Cargo loaded in trucks: Trucking Companies (except as above).
- Cargo in line owned containers: Global, and, possibly, regional Container Shipping Lines (except as above).

A very significant part of the trade (and the corresponding transport operations) being controlled outside of the TRACECA countries, it is essential for TRACECA national stakeholders willing to attract more cargo flow and to compete with the alternative routes to develop a capacity to deal with external decision-makers, and more particularly :

- For institutional stakeholders, to be aware of their expectation
- For transport operators, to get acquainted with these potential customers and trading network.

1.4 Target Volumes

- A market share objective is not realistic in the short or medium-term, the priority being to build credibility and confidence in the service package.
- The volume to be attracted must correspond to a fully efficient, seamless operation of the existing infrastructure (ports, vessels, intermodal facilities including inland) all along TRACECA Corridor.

2. The supply approach

2.1 The specific case of the rail-ferries

- The rational employment of the existing fleet of railferries in both the Black and the Caspian Sea is a first and absolutely necessary step towards an improvement in the operation of the whole transport chain.
- The existing tonnage is enough to meet the needs of the market, all the more under the present economic circumstances.
- However the service schedules remain erratic on all maritime railferry links either on account of port congestion (berth occupancy in Aktau) or because of a lack of proper and timely coordination with the railway companies (Poti, Turkmenbashi).
- In most cases vessels remain at berth (sometimes for several days) waiting for the return wagon load : this entails berthing delays for the next incoming vessels, accrued voyage expenses for the whole fleet, a much poorer rolling stock turnover with subsequent stock imbalance and possible equipment shortages at one or the other end of the route,
- Implementing fixed-day sailings or at least regular schedules will allow attracting new cargo-flows which today are routed via alternative means and corridors and run the railferries at full capacity, and port facilities at optimized occupancy.

A few examples of lost trades:

- ✓ breakbulk cargo from Turkey to Turkmenbashi routed in winter by rail through the TRACECA Central Corridor and through the Volga-Don complex by sea-river vessels as soon as the navigation period starts (as per the Port of Poti, the volume lost is in the range of 300,000 T p.a.).
- ✓ breakbulk cargo shipped in rail wagons from the Asian part of Turkey to Illychevsk by ferry then through Ukraine and Russia into Central Asian landlocked countries.
- ✓ breakbulk cargo in rail wagons from the European part of Turkey and Bulgaria through Romania, Moldova, Ukraine and Russia into Central Asian landlocked countries.
- ✓ Cargo in breakbulk or in railway containers railed from Kazakhstan to Central European countries (Serbia, Montenegro, Slovakia) via Russia and Ukraine, containers from the Far-East railed from Odessa and (mostly) Riga through Russia into Central Asian landlocked countries. Additionally the ports of the Baltic States handle the whole container-flow between Northern Europe and Central Asia.

2.2 The Roro demand

- There is a big, already existing market in the Caspian region, controlled in its vast majority by Turkish companies, estimated at 24,000 trucks yearly into Turkmenistan and Kazakhstan alone,
- Only 5,000 cross the Caspian Sea due to the insufficient quality of the shipping services offered,
- Most are longing to use the Trans-Caspian route to reduce transit-times and costs (sailing from Anzali or Baku forth and back saves some 1,400 km driving/500 liters of gasoline),
- Deploying only one small Roro of the 'Kompositor' type (35 trucks / 12 kn cruise speed / 3/4 stern ramp therefore not requiring any special berth/ramp) available in the fleet of Caspar) on a permanent basis (1 sailing every 3 days) between Baku and Aktau would enable to cover the full present needs of the Turkish-Kazakh market (4,000 trucks a year). This only requires a full berthing priority and a smooth customs and transit system in both ports.
- This could be easily duplicated on the shorter Baku-Turkmenbashi route (160' vs 253' for Aktau-Baku) where, under the afore-mentioned conditions, it would be possible to offer a sailing every 48 hours and absorb 50% more trucks with a similar vessel.
- The Black Sea case is different as the competitive advantage of Roro versus all land transport, in terms of frequency, transit-time and costs remains to be proved. As in Western Europe, and except when the maritime advantage is clear, the shift from road to sea needs a very strong political will based on a set of socio-ecological criteria emphasizing environmental and safety concerns.

2.3 Container: a glance into the crystal ball

- Container has worldwide become the standard unit of transport for an innumerable variety of goods.
- The development of containerization along the TRACECA Corridor remains however extremely slow at bilateral as well as regional level, let alone transit cargo-flows, mainly because of administrative, commercial and tariff barriers and a rather low knowledge of modern container operation.
- The advantages resulting from the use of container in reducing overall transport costs (as in the Sino-US trade where containers proceeding from China stuffed with consumer or industrial goods have long been reloaded back full of scraps, old papers etc.. and more recently full of grain) and boosting exports are still to be learnt, with the understanding that shipping in containers allow today a great(er) deal of companies worldwide to reach an incomparably larger market by trading with small(er) customers.
- Nonetheless, significant container flows are developing via alternative corridors, for instance between Europe and Central Asia via the Baltic States by rail, or via Bandar-Abbas by truck and China by rail.
- Thanks to a combined initiative involving TRACECA, a limited but growing operation is going on from Poti to Afghanistan via Baku and Aktau on behalf of the NATO, the needs of the troops being now estimated at 30,000 containers a year.
This, however, is considered as performed at non-economic over-priced conditions, using non-adapted transport means of limited capacity and with an irregular schedule,

- The major container shipping lines, which constitute the evident driving force in promoting containerization, could be attracted provided, among other provisions, a standard regular container feeder service would be implemented in the Caspian Basin,
- Contrary to the railferry and Roro, an even medium-size container operation will call for more new infrastructure and equipment investments, port management and employees vocational training in both Aktau and Turkmenbashi.

3. - Users' views on TRACECA and competing corridors

(Ref Antalya TRACECA IGC High Level Meeting May 2010)

3.1 The Northern Corridor:

- At the fall of the USSR and for many years thereafter, driving along the Northern route was considered as a perilous adventure. Transport news were full of seemingly accounts where trucks, trailers, cargoes and drivers vanished each day in the Polish or Russian forest... sometimes together with their escort.
- Today :
 - the Corridor is said to be safe,
 - administrative rules (including Customs') have become clear and accessible,
 - costs are the lowest (between 7 and 9,000 Euros per 20 T / 80 + cbm truck from Western Europe to Almaty or Astana excluding escort fees), and can be quickly/timely budgeted including illegal payments which, as per the IRU, the latter represent as much as the double (98%) of the total transit cost,
 - travel-times are more or less fixed and dates of delivery of cargo to the consignees can therefore be scheduled (about 18 days on average from the Netherlands to Almaty). One of the most remarkable achievement in this respect is the Baltika Transit Container Block Train launched in 2003 : over 4,000 km straight from Latvia to Almaty-1 railway station in 96 hours, twice a week,
 - Shippers and Consignees have an easy and direct access to information about their cargo location in real time/at any time (especially with regard to rail transport),

3.2 The Southern (purely road) Corridor:

Similarly :

- The Corridor is said to be safe,
- costs are higher (12,000 Euros for a truck as above from Paris to Almaty) but can be quickly/timely budgeted including illegal payments (as per the IRU, the latter increases the total transit cost by 62%),
- travel-times are more or less fixed and dates of delivery of cargo to the consignees can therefore be scheduled (about 22 days on average from Germany to Almaty),

3.3 The Chinese (purely rail) Corridor (Qingdao-Dostyk) for containers:

- The Corridor is safe,
- costs are cheap and can be quickly/timely budgeted,
- travel-times are more or less fixed and dates of delivery of cargo to the consignees can therefore be scheduled,

3.4 The TRACECA Corridor:

- The Corridor remains 'Terra Incognita' for a great deal of users who express biased/ungrounded views,
- For other users, who have a knowledge of the situation :
 - The Corridor is not always safe,
 - administrative rules and documentation (including Customs' and railways operators) are not clear, often changed, differing from one country to another and not easily accessible (even for local enterprises),
 - obtaining quotations for transport costs is a difficult and time-consuming process, illegal payments (38% of the total transit cost as per the IRU, which is lower than on the other routes, but based on higher levels) vary and cannot be budgeted,
 - OOG (out of gauge) cargoes cannot be moved via the Central Corridor through Caucasus due to gauge restrictions which entail the loss of whole contracts for local operators,
 - costs are altogether higher than via other corridors especially with concern to rail tariffs,
 - travel-times are not fixed because they depend upon too many transport operators, therefore dates of delivery of cargo to the consignees cannot be scheduled as accurately as needed,
 - Shippers and Consignees have no access to information about their cargo location, whatever the mode of transport.

3.5 What opportunities for TRACECA corridor?

The competing corridors have also their own weaknesses which might be opportunities for the Corridor:

- The road border-crossing procedure along the Northern Corridor is still difficult (even more at the moment owing to the implementation of the 'Customs Decentralization Concept in Russia). It has been noted that Belarus Customs Officers lack due vocational training and generally do not know how to handle European Customs documents (resulting in up to 2 day delay). Likewise the truck delay in crossing the Russian-Kazakh border is 2 days on average.

Altogether, the IRU reckons that truck drivers spend up to 40% of travel time just crossing borders, whichever the corridor used.

- The convoy escort procedure in Belarus and Russia remains a non-fully predictable issue, depending on the value of the cargo, which may result in extra-payments and delays waiting for the convoys to be formed. The convoy escort costs about 230-250 Euros/truck in Belarus. It officially costs about 1 USD/km in Russia but the real cost may amount to 2 USD/km with the illicit payments, albeit transport operators get receipts for these whereby they can invoice back same to their Customers. And it must be considered that these rates apply to distances ranging between 2 and 3,000 km.

As a result freight forwarders and trucking companies tend to route valuable cargo (100,000 to 130,000 Euros per truck load) via the Southern Corridor and lesser value cargo via the Northern one.

- The Customs Union between Belarus, Russia and Kazakhstan so far resulted only in steep customs duty tariff increases without prejudicing the impacts of the new rules coming into effects on July 2010, a number of conflicting norms and overlapping legislative acts in the various countries are still making difficulties. Of even greater concern is the customs broker registration provision in its present form, whereby technical or human mistakes or failures (even of customs software) are classified as administrative offences and easily putting companies dealing with customs related business at risk of losing their business.
- A lot of cargoes from US origin destined to the oil and gas industry in Central Asia cannot be moved via the Southern Corridor (Iran). Still, it is not shipped via TRACECA but via the Volga-Don complex (as explained above), making it a potential.
- Foreign drivers crossing Iran are often fined because they have too much fuel in their tanks upon arrival at the Turkish-Iranian border where they further experience delays (2-3 days) on account of numerous truck, driver's papers, cargo and cargo documents inspections. Besides Iranian Authorities levy a 550 USD/truck 'oil-difference' tax on trucks crossing back to Turkey.

- The Chinese railways do not (yet) provide the users with information about their container location while crossing China.

4. Attracting the users to the TRACECA corridor by:

4.1 Changing users' perception

- Political authorities and governmental organizations as well as main stakeholders in the beneficiary countries could show a strong will and a long-term commitment vis-à-vis TRACECA to the Transport Industry (Public and Private actors, mainly in the EU).
- It is of paramount importance to make TRACECA better known to the same circles through dedicated events, organizing, for instance, widely-advertized test-shipments (as was done for the NATO containers and is currently done on the Northern Corridor by the national railway companies of China, Russia, Latvia, Germany).
- A TRACECA User Guide addressing a vast audience in the Transport Industry giving factual, concrete, up-dated information (a possible project for the TRACECA website?) about the Corridor and where to obtain further specialized information would also greatly help change the image.
- Such a guide would also help emphasize the strong points and therefore the attractiveness of the TRACECA Corridor as compared with other routes.

4.2 Meeting users' requirements

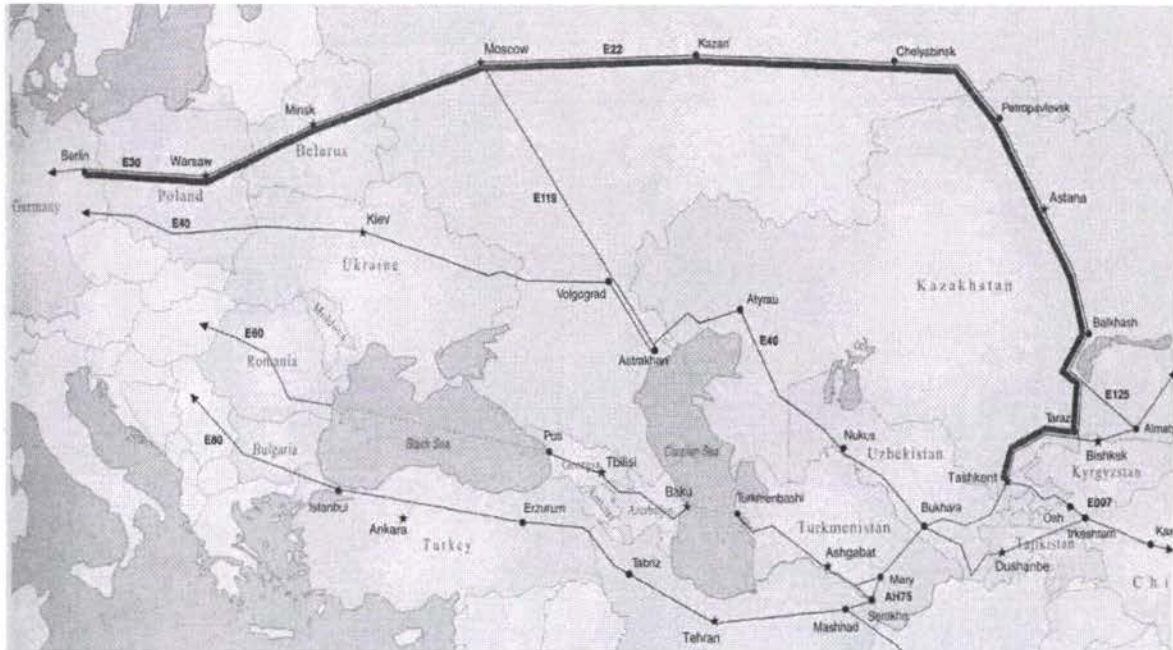
- Setting-up a common, seamless, permanent cargo (and equipment) location information system between railways operators would enable the Users (Shippers, Transport Companies – especially Container Shipping Lines - and Receivers) to trace the cargo and erase the feeling of insecurity which TRACECA is unfortunately often labeled with.
- Setting-up a public centralized common vessel schedule for the railferries in the Black and the Caspian Seas would be a key improvement to attract rolling cargo. There exists, in Western Europe, a number of brokerage companies which collect and advertize on the web the schedules of all the ferries sailing in the European seas and take care of finding the best/timely/cheapest connections, booking the space and settling the freight charges in advance with the shipping lines, for their freight forwarder, shipper or haulier clients.

- Adopting a common simplified customs procedure and fixed and reduced tariffs for cargoes in transit (whichever the mode) would also help reduce delays at border crossing points.
- Adopting, throughout the Corridor, a commonly harmonized cargo nomenclature for railways tariffs would simplify the task of the local forwarders and drastically reduce the time they need to hand out a rail transport quotation, putting them on a par with their Russian colleagues.
- Working out common lower railways tariffs for cargoes in transit with longer periods of validity is a basic requirement from all the users. Predictability is the key word of transport and cost stability is a fundamental component of the perceived reliability of any route.
- Changing legal rules dating back from more than two decades, the TRACECA countries have agreed to address and this could be done also with a view to boost containerization in the region. This implies, in particular, to amend in the short term the prevailing regulations regarding the filling of railway bills, making the Shipping Line's designated partner and only them – and not the receiver of the cargo - responsible for following-up and retrieving Lines' equipments and imposing financial penalties onto a third party failing to meet its obligations with regard to the handling of the said equipment.

These are first ideas suggested and discussed between operators, users and project experts.

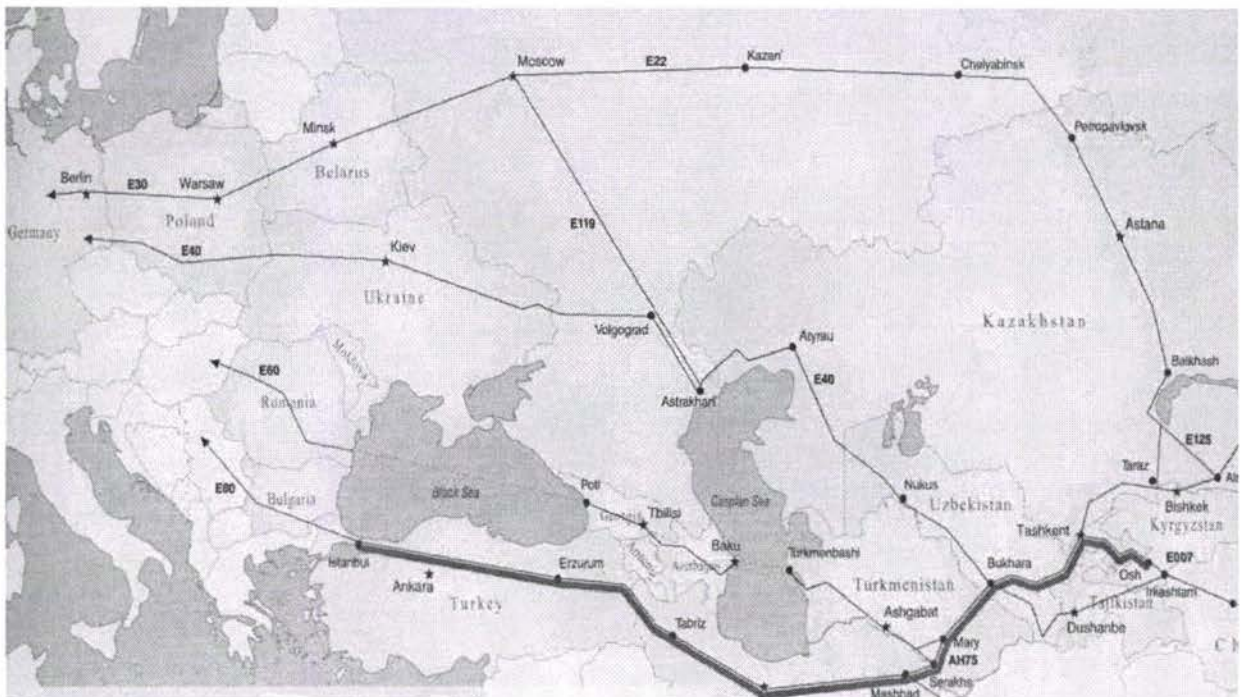
Annex 1: Northern, Central and South corridors

Picture 1. Northern Europe – Asia – Europe corridor



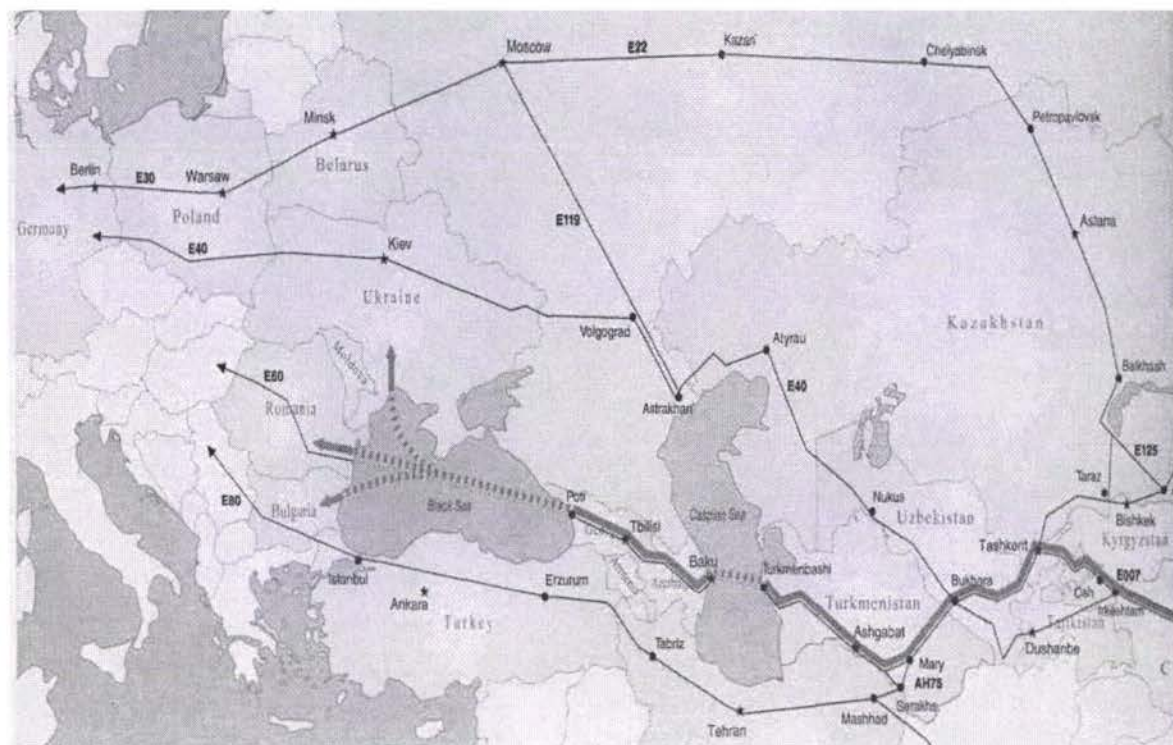
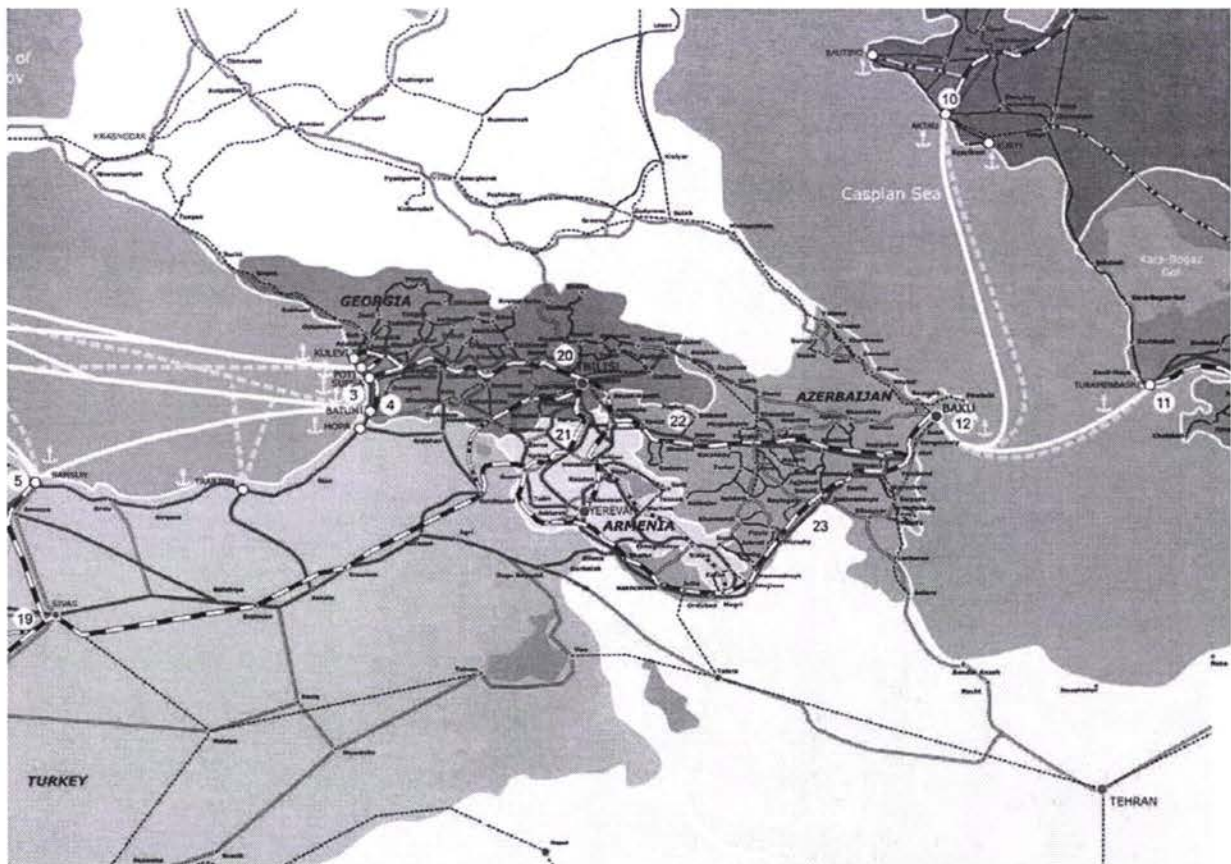
Source: International Road Union (IRU)

Picture 2. Southern Europe – Asia – Europe corridor



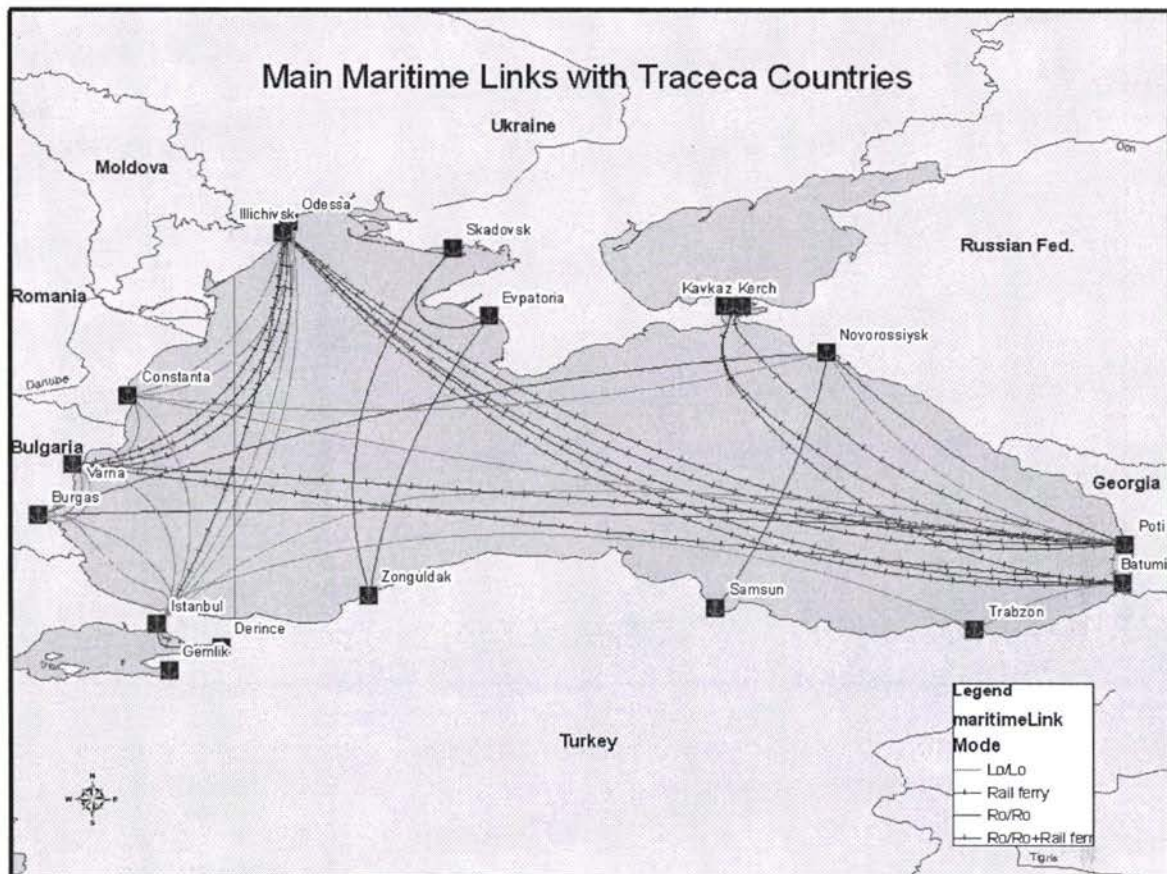
Source: International Road Union (IRU)

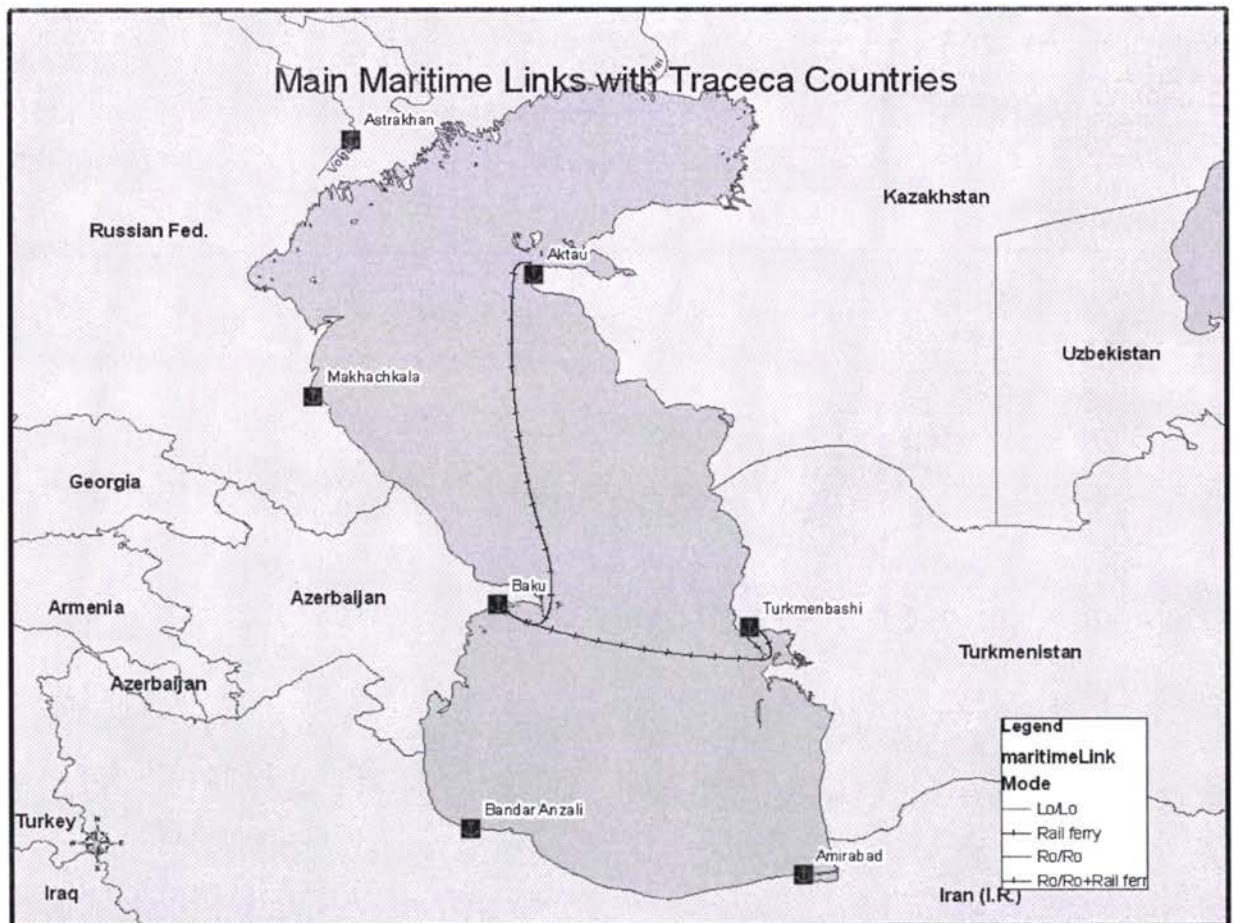
Picture 3. Central Western Europe- Asia- Europe corridor



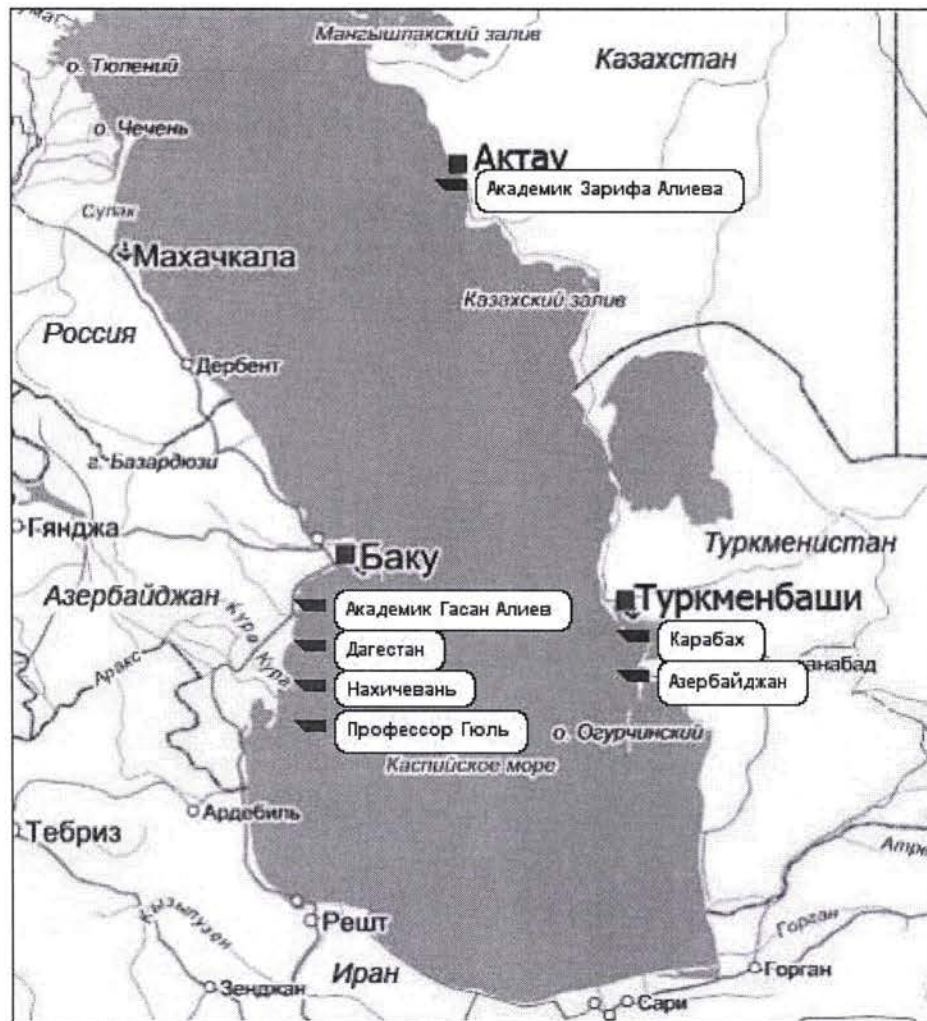
Source: International Road Union (IRU)

Annex 2: Existing maritime services in the Black and the Caspian Seas





Annex 3: Example of situation of Caspar railferry fleet (07/07/2010)



The 4 vessels in Baku are under loading/going to load for Turkmenbashi where the 2 vessels at berth are loading back to Baku.

The sole vessel in Aktau is under loading operations for Baku.

The above evidences the huge imbalance in the trade from Baku to Aktau on the one hand and from Baku to Turkmenbashi on the other hand.

It also gives an idea of why and how Turkmenbashi, which has only 2 ramps, is a congested port. The steaming time between Baku and Turkmenbashi is 12 hours.

The 'Akademik Zarifa Alieva' and the 'Karabakh' are the 2 last purchased in 2007 from the Croatian shipyards at Pula. They have a 52-waggon capacity.

The 5 other ones have been built in the mid-80's and have a capacity of 28-waggons. They belong to the 'Dagestan' Class.

Annex 4: Door-to-door prices

Door-to-door prices- Full trucks- full truckload (FTL)

	TBILISSI		BAKU		ALMATY		ASHGABAT	
A	15 – 16	6 000	18 – 20	6 600	21 – 23	7 500	18 – 20	8 300
B	12 – 13	6 200	12 – 13	7 000	25 – 26	10 300	16 – 17	9 000
C	14	5 700	14	6 000		7 600		9 500
D		4 600		5 500		8 800		9 100
E	10 – 12	5 400	12 – 14	5 800	24	[12 600]	15 – 17	7 600
F		5 000		5 400		9 500		7 300
G	8 – 10	6 200	10 – 12	6 600	17 – 20	10 000	12 – 15	8 200
H		5 800		6 000	15 – 18	10 700	12 – 15	7 000
Min.	10	4 600	10	5 400	15	7 500	12	7 000
Max.	16	6 200	20	7 000	26	[10 700]	20	9 500
Average	12,5	5 600	14,5	6 100	22,5	9 200	16,5	8 250

Notes : A – H : transport logistic operators interviewed

Col. 1 : transit-time / days

Col. 2 : “all in” prices in € / full laden truck / trailer (December 2009)

Annex 5: Maritime services

The attached tables are updating (July 2010) the maritime services from / to the main ports of the direct beneficiary Countries of the MoS pilot project programme and linking these Countries with ports of the Black Sea and Caspian Sea.

Each port to port Line is coupled with the following information:

- maritime operator name
- transport mode / technique
- schedule / frequency
- vessels type / capacities
- important information
- explanatory footnote

General Notes:

- a. Names between brackets after the shipping line name are the brand names given by the shipping lines to their services.
- b. At the time of writing (July 2010) a number of services have been – sometimes heavily - down-sized / cancelled (compared with the previous review December 2009) due to the prevailing economic circumstances.
- c. Same services linking small ports and / or operated on a non regular basis are not mentioned.
- d. The TRACECA 'shipping backbone' across the Black Sea i.e. the UkrFerry / BMF joint-service is operating in competition with the Russian Railways liner system from Port Kavkaz.
- e. Double calls of - sometimes very large - container vessels at various ports, mostly in the Ukraine, do not depend upon port technical conditions and facilities. Most of the time they are linked to Customs rules and practices which are thus affecting schedules and transit time (and related costs for ships and cargo).

Maritime services from / to the main ports of the direct beneficiary countries (Up-date July 2010)

UKRAINE						
	Service from/to	Shipping Line (1)	Mode	Frequency	Capacity	Notes
<i>Ilyichevsk</i>	Poti	UkrFerry	Ro/Ro+Rail ferry	Weekly	M/S "Greifswald" 103 rw waggons or 98 TIR trucks	Russian gauge
	Derince	UkrFerry	Ro/Ro+Rail ferry	Every 10 days	108 rw wagons or 90 TIR 1 680 Lane meters	Russian gauge
	Varna, Poti, Batumi	UkrFerry / BMF (2)	Ro/Ro+Rail ferry	Weekly	108 rw wagons or 90 TIR 1 680 Lane meters	Russian gauge
	Far East (3), Istanbul, Constanza, Ilyichevsk, Odessa (4), Damietta, Far East	CMA-CGM (BEX) / MAERSK (AE3)	Lo/Lo	Weekly	11 x 6200 / 6600 TEUS (5)	Vessel sharing agreement
	Gioia Tauro, Varna-West, Constanza CSCT, Ilyichevsk	MAERSK (Gioia Tauro Sce)	Lo/Lo	Weekly	1 x 1068 plus 1 x 1368 TEUS	In-house feeder service
	Far East (6), Damietta, Kumport, Constanza (7), Ilyichevsk,	CSCL, COSCON, Wan-Hai, PIL, K-Line, Yang-Ming (ABX)	Lo/Lo	Weekly	8 X 4251 / 4734 TEUS	Vessel sharing agreement
	Constanza, Istanbul, West Med, North Africa, Ilyichevsk, Constanza (8)	NEPTUNE SHIPPING LINES MSC (Ukraine service)	Roro PCC – PCTC types (Car and truck carriers) Lo/Lo	Regular Weekly	430 up to 3200 medium-size cars 1 x 1512 TEUS	In-house feeder service

UKRAINE						
Ilyichevsk	Ashdod, Haifa, Limassol, Odessa, Ilyichevsk, Ambarli, Istanbul, Gemlik, Izmir, Piraeus	ZIM (Black Sea Ukraine Service)	Lo/Lo	Weekly	3 X 1260 /1296 / 1334 TEUS	In-house feeder +liner service
	Far East (9), Jeddah, Istanbul, Constanza, Ilyichevsk, Odessa	NORASIA (ABS)	Lo/Lo	Weekly	9 x 5527 / 5770 TEUS	
Kerch Kerch (Port Krym)	Poti/Batumi	UkrFerry / BMF	Ro/Ro+Rail ferry	Weekly	108 rw wagons or 90 TIR 1 680 Lane meters	Russian gauge
	Port Kavkaz	AnRussTrans	Rail ferry	Daily (multiple sailings)	2 x 26 (cisterns) up to 28 (hoppers) rw wagons (10)	Russian gauge
Odessa	Cagliari, Marport, Constanza CSCT, Odessa, Novorossyisk NLE, Poti, Varna West, ConstanzaCSCT, Marport, Cagliari	UFS / Arkas	Lo/Lo	Every 10 days	2 x 1529 plus 1 x 1604 TEUS	Independent common feeder service plus (Arkas) liner service
Odessa	Malta, Volos, Constanza (11), Novorossyisk, Poti, Trabzon, Odessa, Constanza (11), Varna, Malta	CMA-CGM (Black Sea)	Lo/Lo	Weekly	2 x 907 plus 1 x 737 TEUS	In-house feeder service
	Ashdod, Haifa, Limassol, Odessa, Ilyichevsk, Ambarli, Istanbul, Gemlik, Izmir, Piraeus	ZIM (Black Sea Ukraine Service)	Lo/Lo	Weekly	3 X 1260 / 1296 / 1334 TEUS	In-house feeder + liner service

UKRAINE						
Odessa	Far East (9), Jeddah, Istanbul, Constanza, Ilyichevsk, Odessa	NORASIA (ABS)	Lo/Lo	Weekly	9 x 5527 / 5770 TEUS	
	Istanbul, Odessa, Ilyichevsk	MSC (Ukraine service)	Lo/Lo	Weekly	1 x 1512 TEUS	In-house feeder service
	NWE, Med, all Black Sea ports	Oldendorff/Flamar	Parcel/Heavylift	Monthly	Tramp H/L vessels	
	Far East (3), Istanbul, Constanza, Ilyichevsk, Odessa (4), Damietta, Far East	CMA-CGM (BEX) / MAERSK (AE3)	Lo/Lo	Weekly	11 x 6200 / 6600 TEUS	Vessel sharing agreement
Evpatoria (Skadovsk)	Zonguldak	Karadeniz Ro-Ro	Ro/Ro	Weekly	1 x 1454 lane meters	

GEORGIA						
Port	Service from/to	Shipping Line (1)	Mode	Frequency	Capacity	Notes
	Ilyichevsk	UkrFerry	Ro/Ro+Rail ferry	Weekly	M/ S "Greifswald" 103 rw waggons or 98 TIR trucks	Russian gauge
Poti	Batumi, Varna, Ilyichevsk,	UkrFerry / BMF	Ro/Ro+Rail ferry	Weekly	108 rw wagons or 90 TIR trucks	Russian gauge
	Batumi, Kerch	UkrFerry / BMF	Ro/Ro+Rail ferry	Weekly	108 rw wagons or 90 TIR trucks	Russian gauge
	Malta, Volos, Constanza (11), Novorossyisk, Poti, Trabzon, Odessa, Constanza (11), Varna, Malta	CMA-CGM (Black Sea)	Lo/Lo	Weekly	2 x 907 plus 1 x 737 TEUS	In-house feeder service
	NWE, Med, all Black Sea ports	Oldendorff/Flamar	Parcel/Heavylift	Monthly	Tramp H/L vessels	
	Port Kavkaz	Black Sea Ferry Investment (BFI - БФИ) (12)	Ro/Ro+Rail ferry	Weekly	2 x 50 wagons or 318 TEUS	Russian and European gauges
	Burgas, Poti, Novorossyisk, Poti, Burgas	SOMAT (13)	Ro/Ro	Weekly	1 x 1200 lane meters	In-house feeder service (14)
	Heraklion, Gioia Tauro, Poti	MAERSK (Heraklion-Poti Sce)	Lo/Lo	Weekly	2 x 1100 TEUS	In-house feeder service
Poti	Istanbul, Poti, Trabzon	MSC	Lo/Lo	Every 3 days	2 x 975 /1022 TEUS	In-house feeder service
	Istanbul, Novorossyisk, Poti	Norasia (Black Sea Link)	Lo/Lo	Weekly	1 x 698 TEUS	In-house feeder service

	Ilyichevsk	UkrFerry	Ro/Ro+Rail ferry	Weekly	M/S "Greifswald" 103 rw wagons or 98 TIR trucks	Russian gauge
Batumi	Poti, Kerch	UkrFerry / BMF	Ro/Ro+Rail ferry Lo/Lo	Weekly	108 rw wagons or 90 TIR trucks	Russian gauge
	Ilyichevsk, Varna	UkrFerry / BMF	Ro/Ro+Rail ferry	Weekly	108 rw wagons or 90 TIR trucks	Russian gauge

AZERBAIJAN						
Port	Service from/to	Shipping Line	Mode	Frequency	Capacity	Notes
Baku	Aktau	CASPAR	Rail ferry	2-3 / week	28 or 52 waggons	Russian gauge
	Turkmenbashi	CASPAR	Rail ferry	2-3 / day	28 or 52 waggons	Russian gauge
	Bandar Anzali	IRISL (Khazar Sea Shipping) (15)	LoLo	Weekly	1 x 3800 dwt general cargo vessel	

KAZAKHSTAN						
Port	Service from/to	Shipping Line	Mode	Frequency	Capacity	Notes
Aktau	Baku	CASPAR	Rail ferry	2-3 / week	28 or 52 wagons	Russian gauge
	Bandar Anzali	IRISL (Khazar Sea Shipping) (15)	Lo/Lo	Weekly	1 x 3800 dwt general cargo vessel	
	Makhachkala	na	na	na	4 x 5000 dwt vessels	Project approved by Russian Government 29/10/09

TURKMENISTAN						
Port	Service from/to	Shipping Line	Mode	Frequency	Capacity	Notes
Turkmenbashi	Baku	CASPAR	Rail ferry	2-3 / day	28 or 52 wagons	Russian gauge
	Bandar Anzali	IRISL (Khazar Sea Shipping) (15)	Lo/Lo	Weekly	1 x 5885 /7004 dwt general cargo vessel	
	Makhachkala, Amir Abad	Port of Makhachkala	Ro/Ro+Rail ferry	Said to be regular	780 Lane meters	Russian gauge / mostly new trucks and cars

Notes

- (1) With regard to the containerized trade it must be noted that a number of other major Japanese (MOL), European (Hapag-Lloyd, Hanjin's German subsidiary Senator Lines) and American container lines (APL) are loading on the services herein described.
- (2) UkrFerry and BMF operate in joint-service/under a pool sharing agreement a fleet of 4 sisterships ('Герой'='Heroes' class) built in the late 70's. BMF, an ex Bulgarian state-company ('Navibulgar') is now a 70% subsidiary of Maritrade Shipping und Transport GmbH, Duesseldorf.
- (3) 10 ports of call from Dalian (Northern China) to Port Kelang (Malaysia).
- (4) Double call in Odessa (HPC and Brooklyn Kiev Terminals).
- (5) All reported TEU capacities are nominal ones.
- (6) 5 ports of call from Shanghai (Central China) to Port Kelang.
- (7) Transshipment to Burgas, Varna and Odessa.
- (8) NEPTUNE has the exclusive use of two car terminals at Evyap (Derince, Turkey) and Constanza.
- (9) 7 ports of call from Xingang (China) to Port Kelang (Malaysia).
- (10) The line is under a Russian exclusive monopoly officially approved at CIS governmental level (AnRussTrans is controlled by the Russian Railways (РЖД). The main trade from Port Kavkaz is oil and oil products in tanks from Russia, Azerbaijan and Central Asia. *The passage from Port Kavkaz to Port Krym across the Kerch Strait lasts less than 30'.*
- (11) Double call in Constanza, SOCEP and CSCT (DPA Constanza South Terminals).
- (12) A 51% subsidiary of РЖД (the Russian Railways).
- (13) A 93% subsidiary of German major trucking and logistics company Willy Betz.
- (14) Willy Betz trucks and trailers carried across the Black Sea arrive from / depart to Europe to/from the loading port (Burgas) via another own Willy Betz dedicated 5 x 50 truck+trailer catamaran feeder service along the Danube river from/to Passau (Bayern) to/from Vidin (Bulgaria). The transit-time southbound (Passau to Vidin) is 5 days.
- (15) December 2009 - Data blocked for the Islamic Republic of Iran Shipping Lines – IRISL - (of which Khazar Sea Shipping is an affiliate) for political reasons.

Other maritime services from / to the main Black Sea/Caspian ports (Up-date July 2010)

RUSSIA						
Port	Service from/to	Shipping Line (1)	Mode	Frequency	Capacity	Notes
Novorossyisk	Ashdod, Novorossyisk NUTEP, Izmir Aliaga Terminal, Port Said East Terminal	MAERSK (Port Said Ashdod Novorossyisk Feeder)	Lo/Lo	Weekly	3 x 1092 / 1347 TEUS (2)	In-house feeder service
	Istanbul, Gemlik, Izmir, Haifa, Ashdod, Alexandria, Istanbul, Novorossyisk, Constanza,	MSC (Israel service)	Lo/Lo	Weekly	2 x 1384 / 1742 TEUS	In-house feeder service
	Far East (3), Colombo, Haifa, Ashdod, Ambarli, Novorossyisk, Constanza, Ambarli, Haifa, Nhava Sheva, Colombo	ZIM (East-Med Express Service - EMX)	Lo/Lo	Weekly	10 x 4253/ 4256 / 4334 TEUS	
	Alexandria, Beirut, Lattakia, Mersin, Marport, Gemlik, Novorossyisk, Marport, Evyap, Gemlik, Izmir	Arkas	Lo/Lo	Weekly	3 x 1604 TEUS	Independent common feeder plus liner service
	Samsun	Karadeniz Ro-Ro	Ro/Ro	Weekly	1 x 1454 lane meters	
	Samsun	Cenk Group	Ro/Ro	Weekly	M/S 'Cenk A' cap. n.a.	
Gelendjik	Samsun	Birlik Denizcilik	Ro/Ro	Weekly	n.a. (4)	
Taganrog	Constanza, Taganrog	CMA (Black Sea Feeder 2)	Lo/Lo	Weekly	1 x 266 TEUS	In-house feeder service

RUSSIA						
Port Kavkaz	Varna	Black Sea Ferry Investment (BFI - БФИ) (5)	Ro/Ro+Rail ferry	Weekly	1 x 50 waggons or 318 TEUS (6)	Russian and European gauges
	Samsun	Black Sea Ferry Investment (BFI - БФИ) (5)	Ro/Ro+Rail ferry	Weekly	1 x 50 waggons or 318 TEUS	Russian and European gauges
Sochi	Closed to cargo vessels as from September, 2010					
Astrakhan (7)	Bandar Anzali	IRISL (Khazar Sea Shipping) (8)	Lo/Lo	Weekly	1 x 3785 /3816 dwt general cargo vessel	
Olya (9)	Bandar Anzali, Aktau	Северо-Каспийское Морское Пароходство ФГУП (North Caspian Shipping Company)	Roro	Every 10 days	n.a. (10)	

BULGARIA						
Port	Service from/to	Shipping Line	Mode	Frequency	Capacity	Notes
Burgas, Varna	Istanbul	MSC (Black Sea Bulgaria Service)	Lo/Lo	Weekly	1 x 1388 TEUS	In-house feeder service

Notes:

- (1) With regard to the containerized trade it must be noted that a number of other major Japanese (MOL, NYK), Chinese (CSCL) and European (Hapag-Lloyd) container lines are loading on ZIM (EMX) service.
- (2) All reported TEU capacities are nominal ones.
- (3) 5 ports of call from Pusan (Korea) to Port Kelang (Malaysia).
- (4) The traffic consists in fruits and vegetables exported from Turkey.
- (5) A 51% subsidiary of РЖД (the Russian Railways).
- (6) A second, similar, vessel should be added as of August, 2010.
- (7) The Volga river is freezing from 56 up to 148 days per year with a year-on-year 100 day-average.
- (8) Data of December 2009 - Actual data are regrettably blocked as company listed under Executive Order 13382 which targets proliferators of weapons of mass destruction (WMD) and their delivery systems by the U.S. Department of the Treasury's Office of Foreign Assets Control (OFAC), freezing its assets under U.S. jurisdiction and prohibiting transactions with U.S. parties; according to the U.S. Department of the Treasury, the Islamic Republic of Iran Shipping Lines – IRISL - (of which Khazar Sea Shipping is an affiliate) provide logistical services to the Iran's Ministry of Defense and Armed Forces Logistics (MODAFL).
- (9) The port of Olya is located at the mouth of the Volga river on the Caspian Sea, about 100 km downstream from Astrakhan. It is ice-free all year-long.
- (10) Supposedly 4 Roro vessels of the Ro-8, 'Kompositor' class (35 trucks capacity).



On the Black sea



On the Caspian Sea