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Logistics Processes and Motorways of the Sea II

in Armenia, Azerbaijan, Georgia, Kazakhstan, Kyrgyzstan, Moldova,
Tajikistan, Turkmenistan, Ukraine, Uzbekistan

*LOGMOS Master Plan – Annex 3
Part II*

Shipping Line Information

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Types of vessels

Dry cargo vessel: a non box-shaped geared or gearless Lo-Lo vessel (cargo holds are designed for general cargo carriage)

Lo-Lo: Lift-on/Lift-off (geared or gearless container 'box-shaped' vessels)

PCC: Pure Car Carrier

PCTC: Pure Car and Truck Carrier

Railferry: a vessel designed to carry rail wagons

Ro-Ro: Roll-on/Roll-off vessels (usually having the capacity to accommodate up to 12 drivers in cabins. Above 12 passengers (Pax), the vessel is considered a Passenger Vessel and therefore is subject to different safety regulations and additional equipment requirements)

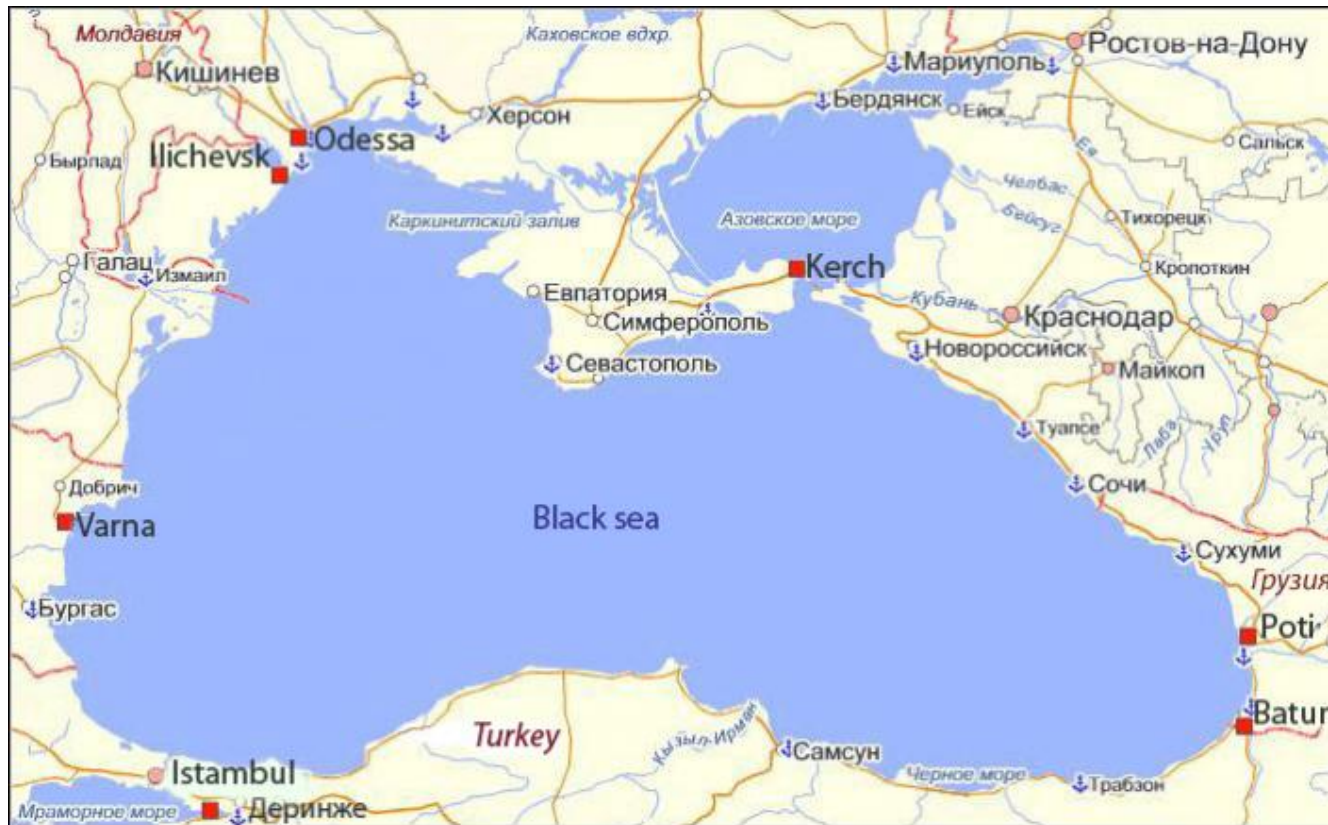
RoPax: (or Ferry Vessel): Roll-on/Roll-off vessel with a large Pax capacity (i.e. the vessel can accommodate in cabins more than 12 Pax, or more Pax than the number of rolling units (trucks/cars) that can be loaded on board)

Sea-river vessel: a vessel which can sail both at sea and on inland waterways



1 **REGULAR MARITIME SERVICES FROM / TO THE MAIN PORTS OF THE DIRECT BENEFICIARY COUNTRIES – UPDATE MARCH 2014**

BLACK SEA BASIN





Logistics Processes and Motorways of the Sea II

1.1 Georgia

Port	Service from/to	Shipping Line	Mode	Frequency	Capacity / Number of ships	Notes
<i>Poti</i>	Kerch ¹	UkrFerry / BMF ²	Ro-Ro+Rail-ferry	Weekly	Up to 108 rw wagons or 90 TIR trucks ³	Russian gauge

¹ Service temporarily suspended.

² UkrFerry and BMF are private companies operating a joint-service under intergovernmental agreements supplemented by a pool sharing agreement. BMF is an ex-Bulgarian state-company ('Navigation Maritime Bulgare'- in short, 'NaviBulgar') and, since August 2008, a 70% subsidiary of the Bulgarian-German consortium 'KG Maritime Shipping'.

UkrFerry and BMF deploy the following fleet in the Black Sea:

- 4 sister Rail/Ro-Ro ferries (2 under Ukrainian and 2 under Bulgarian flag) of 108 wagons or 90 TIR trucks capacity (these were built during the Soviet period, in the late 1970s, the 2 Bulgarian in Norway, and the 2 Ukrainian in the Pula (Croatia) Ulyanik shipyard, which also delivered between 2005 and 2012 all the new railferries employed by Azerbaijan Caspian Shipping Company in the Caspian Sea);

- Additionally, two Rail/Ro-Ro ferries, one belonging to Ukrferry, the M/S 'Greifswald', a vessel of 103 wagons or 98 TIR-truck capacity built in 1988 and, since July 2013, another one chartered by Ukrferry from Danish company DFDS, of 50 wagons + 50 TIR-truck capacity, built in 1987.

It is worth noting that the M/S 'Vilnius Seaways' is the last Russian-gauge rail-ferry under an EU Member State (Lithuania) flag. DFDS used to run it in the Baltic Sea to carry cargoes in wagons between the EU (port of Sassnitz, Germany) and CIS countries (via the port of Klaipeda in Lithuania). The steadily declining rail-borne traffic has, however, led DFDS to close this line in 2013.

Furthermore, all 6 vessels carry passengers in cabins (the 4 sisters have a capacity of 50 Pax each while the 'Greifswald' can accommodate 150 and the 'Vilnius Seaways' 108 Pax).

³ As vessels plying the service may change depending on the volume of cargo bookings, the capacity indicated and noted 'up to' is the capacity of the biggest vessel in the service at the time of writing this report.



Logistics Processes and Motorways of the Sea II

Port	Service from/to	Shipping Line	Mode	Frequency	Capacity / Number of ships	Notes
Poti	Ilychevsk	UkrFerry / BMF	Ro-Ro+Rail-ferry	3 times per week	Up to 108 rw wagons or 90 TIR trucks	Russian gauge
	Derince, Constanza, Novorossiysk ⁴	UkrFerry / BMF	Ro-Ro+Rail-ferry	Every fortnight	Up to 108 rw wagons or 90 TIR trucks	Russian gauge
	Malta, Istanbul (Ambarli), Poti, Trabzon, Odessa ⁵ , Varna West, Thessaloniki, Malta	CMA-CGM (Black Sea 1 Feeder)	Lo-Lo	Weekly	1 x 1061 + 2 x 1155 TEU	In-house plus common feeder service
	Port Kavkaz	Black Sea Ferry Investment (BFI–БФИ) ⁶	Ro-Ro+Rail-ferry	Weekly	1 x 50 wagons or 70 TIR trucks	Russian and European gauges
	Gemlik ⁷ , Istanbul (Kumport+Marport), Samsun	Arkas (Turkey-Poti Service – TPS)	Lo-Lo	Weekly	2 x 1604 TEU	Liner plus feeder service, loading Maersk to Poti

⁴ The service from Derince to Poti has been in place since 2012. It has been planned for some time to extend it to Constanza and Novorossiysk.

⁵ Brooklyn-Kiev Container Terminal berths 42-43.

⁶ A 51% subsidiary of RZD (the Russian Railways), also operates similar Rail/Ro-Ro ferry services in the Baltic Sea between Ust Luga (Russia) and Baltiysk (Kaliningrad enclave, Russia), and between Baltysk and Sassnitz (Germany). The Line also provides spot calls at the rail-ferry terminal of Samsun (Turkey).

⁷ Borusan Terminal.



Logistics Processes and Motorways of the Sea II

Port	Service from/to	Shipping Line	Mode	Frequency	Capacity / Number of ships	Notes
Poti	Istanbul, Odessa ⁸	MSC (Istanbul-Poti-Odessa Service)	Lo-Lo	Weekly	1 x 1129 TEU	In-house feeder service
	Istanbul, Gemlik	MSC (Istanbul-Poti-Gemlik Service)	Lo-Lo	Weekly	1 x 854 TEU	In-house feeder service
	Istanbul, Trabzon	MSC (Istanbul-Poti-Trabzon Service)	Lo-Lo	Weekly	1 x 1287 TEU	In-house feeder service
	Istanbul, Samsun	MSC (Istanbul-Poti-Samsun Service)	Lo-Lo	Weekly	1 x 1287 TEU	In-house feeder service
	Piraeus, Istanbul (Mardas), Poti, Novorossiysk ⁹	UFS	Lo-Lo	Weekly	1 x 977 + 1 x1155 TEU	Independent feeder service also loading Evergreen to Poti and Novorossiysk
Batumi	Varna, Iliychevsk	UkrFerry / BMF	Ro-Ro+Rail-ferry	Every 8 days	Up to 108 rw wagons or 90 TIR trucks	Russian gauge

⁸ Every other voyage, calling alternatively at Iliychevsk.

⁹ NUTEP Terminal.



Logistics Processes and Motorways of the Sea II

Port	Service from/to	Shipping Line	Mode	Frequency	Capacity / Number of ships	Notes
Batumi	Istanbul, Gemlik	MSC (Istanbul-Batumi-Gemlik Service)	Lo-Lo	Weekly	1 x 1618 TEU	In-house feeder service

1.2 Moldova

Port	Service from/to	Shipping Line	Mode	Frequency	Capacity / Number of ships	Notes
Giurgiulesti	Constanza ¹⁰	Danube Logistics	Lo-Lo	Weekly	1 x 240 TEU	Feeder service

1.3 Ukraine

Port	Service from/to	Shipping Line	Mode	Frequency	Capacity / Number of ships	Notes
Ilychevsk	Poti	UkrFerry / BMF	Ro-Ro+Rail-ferry	3 times per week	Up to 108 rw wagons or 90 TIR trucks	Russian gauge
	Varna, Batumi	UkrFerry / BMF	Ro-Ro+Rail-ferry	Every 8 days	Up to 108 rw wagons or 90 TIR trucks	Russian gauge
	Haydarpasa (Istanbul)	UkrFerry / BMF	Ro-Ro	Twice weekly	1 x 95 TIR trucks	Launched February

¹⁰ CSCT.



Logistics Processes and Motorways of the Sea II

Port	Service from/to	Shipping Line	Mode	Frequency	Capacity / Number of ships	Notes
Ilychevsk						2014
	Far East ¹¹ , SEA, Izmit, Istanbul (Ambarli ¹²), Constanza ¹³ , Odessa ¹⁴ , Ilychevsk ¹⁵ , Istanbul (Ambarli), Port Said East Terminal, SEA, Far East	CMA-CGM (Bosphorus Express) / MAERSK (AE3)	Lo-Lo	Weekly	11 vessels - 2 x 6540 + 2 x 6552 + 1 x 7398 + 1 x 7410 + 2 x 7450 + 2 x 8004 + 1 x 8700 TEU	Vessel sharing agreement
	West Med ¹⁶ , Gioia Tauro, Piraeus, Istanbul, Gebze, Burgas ¹⁷ , Ilychevsk,	MSC (West Med service)	Lo-Lo	Weekly	1 x 2440 + 1 x 2700 + 1 x 2702 + 1 x 2732 TEU	In-house feeder and liner service

¹¹ 11 ports of call in Asia, out of which 9 are westbound (6 in China down from Dalian to Chiwan, 2 in South Korea (Kwangyang and Busan), and 1 in Malaysia (Tanjung Pelepas) and 2 are eastbound (Port Kelang (Malaysia) and Singapore). Duration of round-trip: 77 days.

¹² Kumport Terminal.

¹³ CSCT.

¹⁴ Brooklyn-Kiev Terminal, berths 42-43.

¹⁵ Container Terminal Ilychevsk (CTI - formerly Ukrtranscontainer Terminal).

¹⁶ Valencia, Castellon, Barcelona, Fos.

¹⁷ Every other voyage.



Logistics Processes and Motorways of the Sea II

Port	Service from/to	Shipping Line	Mode	Frequency	Capacity / Number of ships	Notes
Ilyichevsk	Odessa, Istanbul, Gebze, Gemlik, Izmir, Aliaga					
	Far East ¹⁸ , Piraeus, Kumpport, Ilyichevsk ¹⁹ , Constanza ²⁰	COSCO, Yang-Ming, Wan-Hai, CSCL, PIL, Hanjin, K-Line, ZIM (ABX – SBS - ABS)	Lo-Lo	Weekly	8 vessels - 2 x 5551 + 5 x 5668 + 1 x 6039 TEU	Vessel sharing agreement
	Constanza, Gemlik ²¹ , West-Med, Algiers, Tunis ²²	NEPTUNE SHIPPING LINES	PCC – PCTC	Regular	15 vessels from 430 up to 4250 medium-size car capacity	
	Derince	Cenk Group	PCC	Regular	1 x 750 medium-size cars	
	Haydarpara	Stena Sea Line	RoPax	Twice weekly	1 x 130 TIR trucks	Service launched 03/2011

¹⁸ 5 ports of call from Shanghai (Central China) to Port Kelang. Duration of round-trip: 56 days.

¹⁹ Transshipment at Constanza to Burgas, Varna and Odessa.

²⁰ CSCT

²¹ Borusan Terminal.

²² NEPTUNE has the exclusive use of two car terminals at Evyap (Derince, Izmit Gulf, Turkey) and Constanza.



Logistics Processes and Motorways of the Sea II

Port	Service from/to	Shipping Line	Mode	Frequency	Capacity / Number of ships	Notes
Kerch	Poti ²³	UkrFerry / BMF	Ro-Ro+Rail-ferry	Weekly	108 rw wagons or 90 TIR trucks	Russian gauge
Kerch (Port Krym)	Port Kavkaz	AnRussTrans ²⁴ Kerch Ferry Crossing (КПП)	Rail-ferry Day-ferry ²⁵	4 roundtrips/day 6 to 8 vges/day	2 x 26 (cisterns) up to 28 (hoppers) rw wagons 3 vessels for passengers, cars, trucks and vans service	Russian gauge Ukrainian state-owned company/public service
Odessa	Odessa ²⁶ , Constanza ²⁷ , Istanbul (Marport), Casablanca, Tangiers, Algeciras,	Arkas (West Med - Black Sea Service - WBS)	Lo-Lo	Weekly	1 x 1199 + 1 x 1221 + 1 x 1604 TEU	Independent common feeder plus liner service

²³ Service temporarily suspended.

²⁴ The line is under a Russian exclusive monopoly officially approved at CIS governmental level. AnRussTrans (which is controlled by the Russian Railways - РЖД) operates now a fleet of 15 vessels (5 outdated Ro-Pax/rail-ferries built in 1973/1975 were sold for scrapping in 2013/2014) out of which 6 rail-ferries and RoPax running regularly in the Black Sea and the Baltic Sea (between Ust Luga and Baltysk). The main trade from Port Kavkaz to Kerch is oil and oil products in cisterns from Russia, Azerbaijan and Central Asia. The 5-mile passage from Port Kavkaz to Port Krym across the Kerch Strait lasts about 30'.

²⁵ Without cabins.

²⁶ HPC, Odessa Terminal, berths 2-3.

²⁷ SOCEP.



Logistics Processes and Motorways of the Sea II

Port	Service from/to	Shipping Line	Mode	Frequency	Capacity / Number of ships	Notes
Odessa	Cagliari, Izmir, Istanbul (Marport)					
	Malta, Istanbul (Ambarli), Poti, Trabzon, Odessa ²⁸ , Varna West, Thessaloniki, Malta	CMA-CGM (Black Sea 1 Feeder)	Lo-Lo	Weekly	1 x 1061 + 2 x 1155 TEU	In-house plus common feeder service
	West Med ²⁹ , Gioia Tauro, Piraeus, Istanbul, Gebze, Burgas ³⁰ , Ilyichevsk, Odessa, Istanbul, Gebze, Gemlik, Izmir, Aliaga	MSC (West Med service)	Lo-Lo	Weekly	1 x 2440 + 1 x 2700 + 1 x 2702 + 1 x 2732 TEU	In-house feeder and liner service
	Far East, SEA, Izmit, Istanbul (Ambarli), Constanza, Odessa, Ilyichevsk, Istanbul (Ambarli), Port Said East Terminal, SEA,	CMA-CGM (Bosphorus Express) / MAERSK (AE3)	Lo-Lo	Weekly	11 vessels - 2 x 6540 + 2 x 6552 + 1 x 7398 + 1 x 7410 + 2 x 7450 + 2 x 8004 + 1 x 8700 TEU	Vessel sharing agreement

²⁸ Brooklyn-Kiev Container Terminal berths 42-43.

²⁹ Valencia, Castellon, Barcelona, Fos.

³⁰ Every other voyage.



Logistics Processes and Motorways of the Sea II

Port	Service from/to	Shipping Line	Mode	Frequency	Capacity / Number of ships	Notes
Odessa	Far East					
	Piraeus, Novorossiysk, Odessa, Constanza, Varna, Istanbul	Evergreen (Black Sea Feeder Service – BSF)	Lo-Lo	Weekly	1 x 1200 + 1 x 1468 TEU	Also loading ZIM
	Far East ³¹ , Haifa, Ambarli ³² , Odessa ³³ , Novorossiysk, Ambarli, Haifa, Nhava Sheva	ZIM (East Med / Black Sea Express Service – EMX)	Lo-Lo	Weekly	10 vessels - 7 x 4253 + 3 x 4526 TEU	
	Novorossiysk, Gemlik, Istanbul, Evyap, Izmir, Alexandria, Ashdod, Haifa, Izmir	Admiral Container Lines	Lo-Lo	Weekly	1 x 510 + 1 x 660 + 1 x 700 TEU	

³¹ 5 ports of call in the FE from Pusan (South Korea) to Port Klang (Malaysia). Duration of round-trip: 70 days.

³² Mardas Terminal.

³³ HPC, Odessa Terminal, berths 2-3.



Logistics Processes and Motorways of the Sea II

Port	Service from/to	Shipping Line	Mode	Frequency	Capacity / Number of ships	Notes
	Port Said East, Ashdod, Ambarli, Constanza, Odessa, Ambarli, Ashdod	Hapag-Lloyd, MOL ³⁴ (BSF)	Lo-Lo	Weekly	1 x 2762 / 1 x 2824 TEU	
TIS Yuzhniy	Caucedo, Manzanillo, Buenaventura, Guayaquil, Balboa, Manzanillo, Algeciras, Malta, Evyap, Kumpport, Novorossiysk ³⁵	MAERSK (ECUMED ³⁶)	Lo-Lo	Weekly	10 vessels – 1 x 2797 + 1 x 2833 + 7 x 3194 + 1 x 4194 TEU	Base cargo : fresh fruit in reefer containers MSC buys slots on this service
Yevpatoria	Zonguldak	Karadeniz Ro-Ro Cenk Group	RoPax RoPax	Weekly Weekly	2 x 85 TIR trucks 1 x 53 + 2 x 85 TIR trucks	Base cargo: fresh fruits and vegetables
Skadovsk Sebastopol	Zonguldak	Birlik Roro Isletmeleri	RoPax	Weekly	1 X 75 TIR trucks	Base cargo: fresh fruits and vegetables

³⁴ The G6 (born in December 2011 from the merger of former Grand and New World Alliance including APL, Hapag-Lloyd, HMM, OOCL, MOL and NYK) stopped its direct Far East-Black Sea service in September 2013. G6 members are now loading on ZIM EMX service and launched in addition this BSF feeder operation to relay containers between the Far-East and the Black Sea via Port Said.

³⁵ NUTEP Terminal.

³⁶ 69-day roundtrip



Logistics Processes and Motorways of the Sea II

Port	Service from/to	Shipping Line	Mode	Frequency	Capacity / Number of ships	Notes
<i>Dnepropetrovsk</i>	Constanza	Tavria Line	Sea-river	Weekly	2 x 112 TEU STK Class	



Logistics Processes and Motorways of the Sea II

CASPIAN SEA BASIN





Logistics Processes and Motorways of the Sea II

1.4 Azerbaijan

Port	Service from/to	Shipping Line	Mode	Frequency	Capacity / Number of ships	Notes
Baku	Aktau	Azerbaijan Caspian Sea Shipping Company ³⁷	Rail-ferry	2-3 / week unscheduled	28, 52 or 54 wagons	Russian gauge
			Ro-Ro	2 / week unscheduled	2 x 33 TIR trucks or 365 cars 'LADA' type	Service resumed 02/2011
			Dry-cargo vessels	Upon inducement / no regular schedule	About 100/120 TEU on deck	NATO humanitarian cargo to Afghanistan
	Turkmenbashi	Azerbaijan Caspian Sea Shipping Company	Rail-ferry	2-3 / day unscheduled	28, 52 or 54 wagons	Russian gauge
	Bandar Anzali, Nowshahr, Amirabad	Khazar Sea Shipping Lines	Dry-cargo vessels	na	2500/7000 DWCC	

³⁷ Azerbaijan Caspian Sea Shipping Company, the state-owned shipping company of Azerbaijan deploys a total fleet of 13 rail-ferries and 2 Ro-Ros.



Logistics Processes and Motorways of the Sea II

1.5 Kazakhstan

Port	Service from/to	Shipping Line	Mode	Frequency	Capacity / Number of ships	Notes
Aktau	Baku	Azerbaijan Caspian Sea Shipping Company	Rail-ferry	2-3 / week unscheduled	28, 52 or 54 wagons	Russian gauge
			Ro-Ro	2 / week unscheduled	2 x 33 TIR trucks or 365 cars 'LADA' type	Service resumed 02/2011
			Dry-cargo vessels	Upon inducement / no regular schedule	About 100/120 TEU on deck	NATO humanitarian cargo to Afghanistan
	Bandar Anzali, Nowshahr, Amirabad	Khazar Sea Shipping Lines	Dry-cargo vessels	na	2500/7000 DWCC	



Logistics Processes and Motorways of the Sea II

1.6 Turkmenistan

Port	Service from/to	Shipping Line	Mode	Frequency	Capacity / Number of ships	Notes
Turkmenbashi	Baku	Azerbaijan Caspian Sea Shipping Company	Rail-ferry	2-3 / day unscheduled	28, 52 or 54 wagons	Russian gauge
	Bandar Anzali, Nowshahr, Amirabad	Khazar Sea Shipping Lines	Dry-cargo vessels	na	2500/7000 DWCC	
	Makhachkala	SAFINAT Group	Rail-ferry	regular	2 x 52 wagons	Russian gauge Base cargo: oil and LNG



Logistics Processes and Motorways of the Sea II

WORLD RANKING OF CONTAINER LINES OFFERING SERVICE IN THE BLACK SEA (as of March 20, 2014)³⁸

Rank	Operator	Total		Owned		Chartered			Orderbook		
		TEU	Ships	TEU	Ships	TEU	Ships	% Chart	TEU	Ships	% existing
1	Maersk	2606051	565	1465385	248	1140666	317	43.8%	255780	14	9.8%
2	MSC	2401627	481	1036103	188	1365524	293	56.9%	438851	38	18.3%
3	CMA-CGM	1507647	422	526288	83	981359	339	65.1%	367657	37	24.4%
4	Evergreen	876013	200	501027	107	374986	93	42.8%	299252	25	34.2%
5	COSCO	768949	155	406024	94	362925	61	47.2%	87158	8	11.3%
6	Hapag-Lloyd	739207	153	394270	64	344937	89	46.7%	26338	2	3.6%
7	APL	652603	122	349672	47	302931	75	46.4%	41600	4	6.4%
8	Hanjin	601785	108	299474	43	302311	65	50.2%	110720	12	18.4%
9	CSCL	592668	130	432283	73	160385	57	27.1%	155216	11	26.2%
10	MOL	552638	112	208372	34	344266	78	62.3%	122600	12	22.2%
12	NYK Line	466737	104	300513	54	166224	50	35.6%			
13	OOCL	461140	88	312065	46	149075	42	32.3%	61968	6	13.4%
14	Yang Ming	369105	85	216090	45	153015	40	41.5%	239418	21	64.9%
15	HMM	363763	61	125510	19	238253	42	65.5%	99300	9	27.3%
16	PIL	355215	164	248916	114	106299	50	29.9%	46800	12	13.2%
17	K Line	354131	68	131156	21	222975	47	63.0%	69350	5	19.6%
18	ZIM	328218	84	133394	25	194824	59	59.4%			
21	Wan Hai Lines	168965	74	148745	66	20220	8	12.0%			

³⁸ The list includes only shipping companies actually providing their (own and/or chartered) tonnage in Black Sea liner services.



Logistics Processes and Motorways of the Sea II

27	UniFeeder	57,357	55			57,357	55	100.0%			
29	Arkas	48702	36	35226	26	13476	10	27.7%			
54	FESCO	21826	19	10864	13	10962	6	50.2%			

Source: Alphaliner Top 100



2 OTHER REGULAR MARITIME SERVICES FROM / TO THE MAIN PORTS OF THE INDIRECT BENEFICIARY COUNTRIES AND OTHER BLACK SEA/CASPIAN PORTS – UPDATE MARCH 2014

BLACK SEA BASIN

2.1 Bulgaria

Port	Service from/to	Shipping Line	Mode	Frequency	Capacity / Number of ships	Notes
Burgas Varna	Ambarli ³⁹	MSC (Bulgaria Service)	Lo-Lo	Weekly	1 x 1388 TEU	In-house feeder service
Burgas Varna ⁴⁰	Marport, Kumport	Arkas (Turkey / Bulgaria Service - TBS)	Lo-Lo	Weekly	1 x 1199 TEU	Also loading Maersk

³⁹ Marport Terminal.

⁴⁰ West Terminal.



Logistics Processes and Motorways of the Sea II

2.2 Romania

Port	Service from/to	Shipping Line	Mode	Frequency	Capacity / Number of ships	Notes
Constanza	Haifa, Ashdod, Limassol, Novorossiysk, Constanza ⁴¹ , Gemlik ⁴² , Thessaloniki, Izmir, Piraeus	ZIM (Black Sea Express - BSX)	Lo-Lo	Weekly	2 x 1296 + 2 x 1702 TEU	
	Constanza ⁴³ , Taganrog	CMA-CGM (Black Sea 2 Feeder)	Lo-Lo	Weekly	1 x 266 TEU	In-house feeder service

⁴¹ CSCT.

⁴² Borusan Terminal.

⁴³ SOCEP.



Logistics Processes and Motorways of the Sea II

2.3 Russia

Port	Service from/to	Shipping Line	Mode	Frequency	Capacity / Number of ships	Notes
Novorossiysk	Alexandria Ashdod	MAERSK (Seago Line – Black Sea Service)	Lo-Lo	Weekly	1 x 868 + 1 x1092 TEU	
	Trieste, Koper, Ravenna, Venice, Gioia Tauro, Piraeus, Gemlik, Evyap, Gebze, Istanbul, Novorossiysk, Constanza	MSC (Adriatic Service 1)	Lo-Lo	Weekly	1 x 2604 +1 x 2754 + 1 x 2808 + 1 x 3016 TEU	In-house liner plus feeder service
	Alexandria, Mersin, Soyak	Arkas (East Med-Russia Express – ERS) ⁴⁴	Lo-Lo	Weekly	2 x 1604 TEU	Independent common feeder plus liner service
	Mersin, Antalya, Kumport, Limas, Novorossiysk, Marport, Gemlik, Aliaga, Famagusta ⁴⁵	Arkas (Antalya-Novorossiysk Service - ANS)	Lo-Lo	Weekly	1 x 1122 + 2 x 1139	

⁴⁴ Additional spot calls at Limas (Nemrut Bay).

⁴⁵ Spot calls at Constanza (SOCEP) just before or after Novorossiysk.



Logistics Processes and Motorways of the Sea II

Port	Service from/to	Shipping Line	Mode	Frequency	Capacity / Number of ships	Notes
Novorossiysk	Pipavav, Hazira, Jawarharlal Nehru ⁴⁶ , Jebel Ali, Salalah, Port Said, Mersin, Izmit, Ambarli, Novorossiysk, Ambarli, Izmit, Mersin, Jeddah, Jebel Ali ⁴⁷	MAERSK (Europe-Middle-East ME 3)	Lo-Lo	Weekly	1 x 4324 + 1 x 4444 + 1 x 4824 + 1 x 5060 + 3 x 5618 TEU	
	Caucedo, Manzanillo, Buenaventura, Guayaquil, Balboa, Manzanillo, Algeciras, Malta, Evyap, Kumport, Novorossiysk ⁴⁸	MAERSK (ECUMED)	Lo-Lo	Weekly	2 x 2797 / 2833 + / 7 x 3194 TEU	Base cargo: fresh fruit in reefer containers MSC buys slots on this service
	Damietta, Port Said ⁴⁹ , Istanbul (Ambarli), Gemlik, Thessaloniki, Piraeus	CMA-CGM (FAS Egypt Maramara Feeder)	Lo-Lo	Weekly	2 x 1129 / 1155 TEU	In-house liner plus feeder service

⁴⁶ All three last ports on North Indian West Coast.

⁴⁷ 51-day roundtrip.

⁴⁸ NUTEP Terminal.

⁴⁹ East Terminal.



Logistics Processes and Motorways of the Sea II

Port	Service from/to	Shipping Line	Mode	Frequency	Capacity / Number of ships	Notes
Novorossiysk	Hamburg, Antwerp, Soutampton, Tangiers, Malta, Thessaloniki, Gebze, Istanbul (Ambarli ⁵⁰ +Haydarpasa), Samsun, Novorossiysk ⁵¹ , Constanza ⁵² , Istanbul (Ambarli), Gebze, Gemlik, Aliaga, Malta, Tangiers, Casablanca ⁵³	CMA-CGM (Femex 1 – Aegean Shuttle)	Lo-Lo	Weekly	6 x 2824 TEU	Co-loading Arkas between Istanbul and Black Sea ports
	Port Said ⁵⁴ , Mersin, Ambarli ⁵⁵ , Novorossiysk, Gemlik	CMA (Citrus Express)	Lo-Lo	Weekly	1 x 966 + 1 x 1022 + 1 x 1098 TEU	Seasonal in-house feeder service dedicated to fresh fruit

⁵⁰ Kumport Terminal.

⁵¹ NUTEP.

⁵² CSCT.

⁵³ 42-day roundtrip back to Hamburg.

⁵⁴ East Terminal.

⁵⁵ Kumport Terminal.



Logistics Processes and Motorways of the Sea II

Port	Service from/to	Shipping Line	Mode	Frequency	Capacity / Number of ships	Notes
Novorossiysk Gelendjik ⁵⁶ Tuapse	Samsun	Cenk Group Kalyoncu Ro-Ro ⁵⁷ Birlik Denizcilik Karadeniz Ro-Ro	Ro-Ro	Several times weekly 1 vge/week	1 x 85 TIR trucks 1 x 50 + 1 x 63 + 1 x 85 TIR trucks 1 x 85 TIR trucks 1 x 75 TIR trucks	
Rostov-on-Don	Mardas ⁵⁸	LAMRus (in cooperation with MSC)	Lo-Lo	3 vges /month	1 x 225 TEU sea-river vessel	Service extended to Turkmenbashi during navigation period of Russian inland waterways
Azov	Ambarli	MAERSK	Lo-Lo	Every 9 days	1 x 370 TEU	

⁵⁶ Turkish vessels are deployed to either port depending on cargo-flow. The base cargo is fresh fruit and vegetables and industrial cargoes to Central Asia.

⁵⁷ This company operates a total fleet of 9 Ro-Ros and also runs a non-regular line between Zonguldak and Ilyichevsk.

⁵⁸ Additional spot calls at Mariupol and Azov.



Logistics Processes and Motorways of the Sea II

Port	Service from/to	Shipping Line	Mode	Frequency	Capacity / Number of ships	Notes
Port Kavkaz	Varna ⁵⁹	AnRussTrans ⁶⁰	Ro-Ro+Rail-ferry	Weekly	2 x 50 wagons or 318 TEU	Russian and European gauges
Sochi⁶¹	Novorossiysk, Izmir, Ambarli, Gebze ⁶²	FESCO (Black Sea Shuttle)	Lo-Lo	Every 10 days	1 x 700 TEU	Opened October 2012

⁵⁹ This service allows operations to by-pass Romania, Moldova and Ukraine and shortens the distance from Bulgaria to Russia by some 800 kms.

⁶⁰ A joint-venture, called 'Varna Ferry' has been created between Bulgarian River Shipping Cy and Navigation Maritime Bulgare in 2011 in order for Bulgaria to take part in this trade. A first second-hand rail-ferry) has been purchased and underwent lengthy repairs. There have been plans to acquire a second unit . However the beginning of operations was repeatedly delayed and could still not be ascertained at the time of writing this report.

⁶¹ The port was closed to cargo vessels as from September, 2010 except for supplies for the 2014 Winter Olympic Games. New berthing facilities have been built for accommodating (larger) cruise ships and a new cargo terminal is under construction and should be ready some time during 2015.

⁶² Turkish ports in the Marmara and Aegean Sea are used as transshipment hubs for goods meant for Sochi carried by FESCO.



Logistics Processes and Motorways of the Sea II

Notes

- a) The above description of schedules, frequency, ports of transshipment and ports of call, vessels' sizes and types and services in general is based on the information made available on their websites or collected directly from the respective Ship Owners / Liner Operators at the time of writing this report. Actual services, rotation of vessels, ports of call and deployment of the fleet may vary significantly on a monthly, weekly or even daily basis on account of fluctuations in cargo volumes due to economic or seasonal factors (crops, summer period, religious celebrations, etc.), congestion, weather conditions preventing sailing/transiting/handling at port(s) and/or at Turkish Straits (Dardanel and Bosphorus), incidents at sea or in port(s) of technical or any other nature, administrative or governmental decisions, etc.
- b) Names between brackets after the shipping line name are the brand names given by the shipping lines to their involved services.
- c) The double calls of (sometimes very large) container vessels at various Terminals in a same port or at nearby ports usually depend upon technical reasons (such as the stowage of the containers on board of the vessel). In Ukraine they are linked to the more or less complacent customs-handling of certain kinds of goods (excise, audio, video, high-tech, high-value, luxury and the like).
- d) Reported container vessel TEU capacities are nominal ones.

Tendencies previously noted remain, i.e.:

- The size of the vessels employed both in deep-sea and feeder services keeps increasing due to the cascading effect resulting from the overcapacity in the container shipping industry and continuous introduction of always bigger ships in the FE-Europe trade lane.
- Compared with the 2008 pre-global financial crisis situation, the number of deep-sea container services in the Black Sea dropped as some have been merged and/or down-sized or now use slow steaming while others have been suspended or altogether suppressed. The last important development is the cancellation of the G6 Alliance direct service from the Far-East to the Black Sea and their joining the stand-alone one plied by Israeli company ZIM .
- It may however be reasonably assumed that the Ukrainian and Romanian container markets being now mature, further deep-sea lines should be opened in the near future to Novorossiysk.
- There are now feeder lines operating solely between the numerous container terminals around the Sea of Marmara. This area is becoming the main transshipment hub to and from the Black Sea, which may entail a further decrease in the volume of transshipments performed in Black Sea ports.



Logistics Processes and Motorways of the Sea II

The launching of the P3 mega alliance between Maersk Line, Mediterranean Shipping Company and CMA-CGM on the main east-west trades. is due to take place during the second quarter of 2014.

In principle this should not have much effect on the shipping trade pattern in the Black Sea and more generally in TRACECA as, according to plans, the services in the region should remain unchanged.

Some other topics will deserve attention in the future.

- After flirting vainly for the past twenty years with compatriot line Hamburg-Sud, German Hapag-Lloyd is now set to merge with Chilean CSAV thus giving birth to the world's number 4 Container Carrier. While Hapag-Lloyd presence in TRACECA region has always been rather marginal, CSAV used to hold a leading position in the Black Sea through its subsidiary Norasia until the 2009 price-war forced them to withdraw.
- The Ukrainian crisis and secession of Crimea should not bear major consequences for the container trade. It may however entail some changes for the short-sea railferry services which linked Ukraine and Russia through the Strait of Kerch and the Ro-Ro lines from Turkey to Ukraine via the ports of Yevpatoria and Sebastopol.
- The renewal of the dialogue with the Islamic Republic of Iran – a TRACECA member state – and possible lifting of the sanctions imposed by Western countries, could result in a revival of the container transit trade through Iranian ports in the Persian Gulf to Caucasus and Central Asia which undoubtedly would bring some decrease in the volumes handled in Black Sea ports, especially at Poti.
- The implementation of modern fast rail connections in Central Asia, such as the Silk Wind, will divert high-value cargo-flows from the sea route from the Far-East. This represents a future loss of potential volumes for Black Sea ports.