

# Luka Koper - Connecting markets

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Port of Koper connecting markets of Central and Eastern Europe with Mediterranean Sea and Far East

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How China - 16 CE European Countries  
could strengthen and develop their relations?



# About the company Luka Koper, d.d.



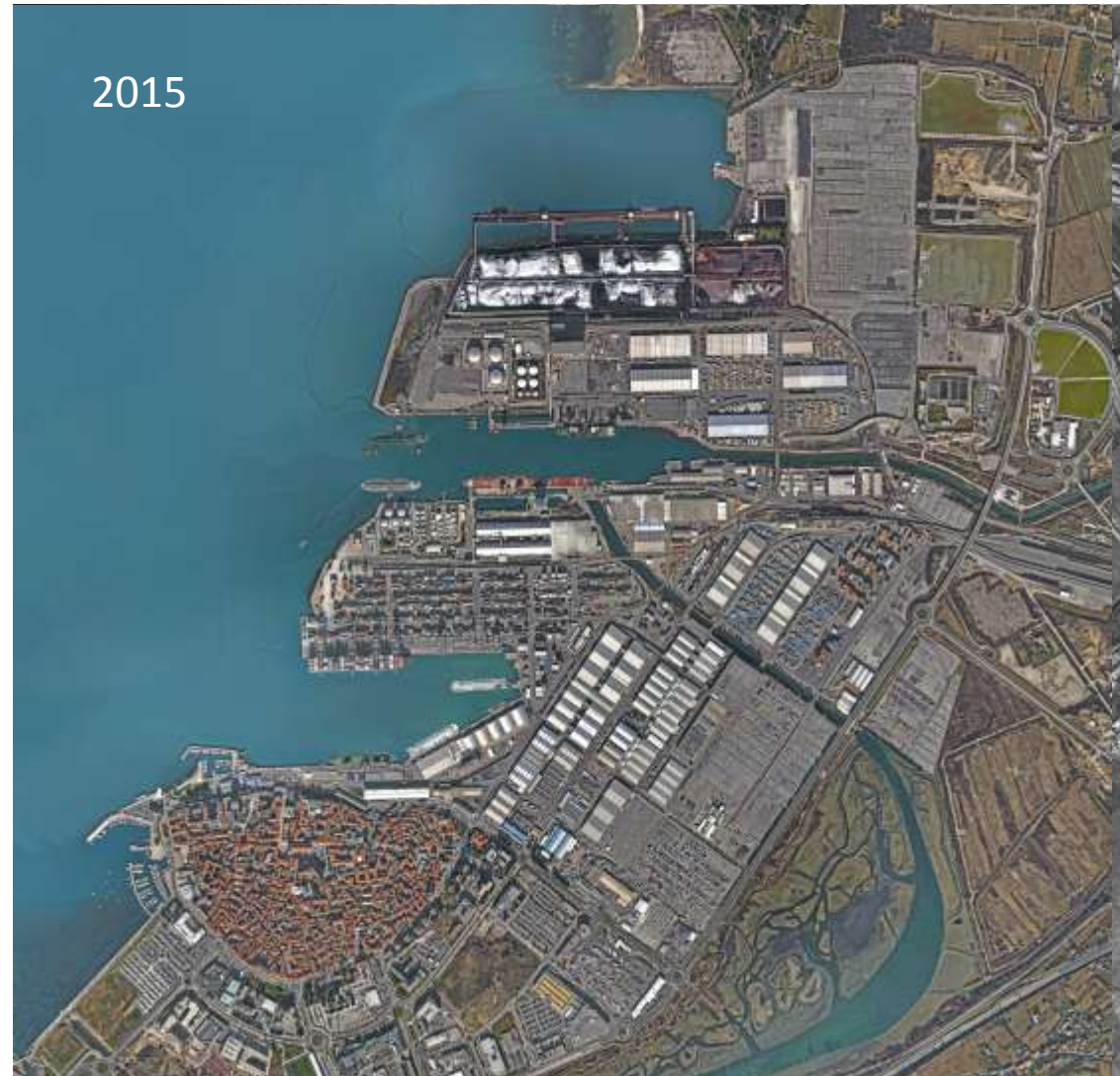
- established in 1957,
- public limited company listed on the Ljubljana stock exchange,
- concession granted for the management of the port area until 2043,
- invests in infrastructure and suprastructure in the port area,
- National spatial plan for the development of the port adopted in 2011,
- terminal operator of all 12 specialized terminals in the Port of Koper,
- 1<sup>st</sup> largest container terminal in Adriatic,
- 2<sup>nd</sup> largest car terminal in Mediterranean,
- maritime throughput in 2015: 20,7 million ton,
- container throughput in 2015: 790.734 TEU,
- Estimated revenues for 2015: 184,2 million EUR (Luka Koper Group),
- 1,000 employees in the Luka Koper Group,
- significant effect on the national economy.



BV - NON GMO certified  
BV – EKO/BIO certified

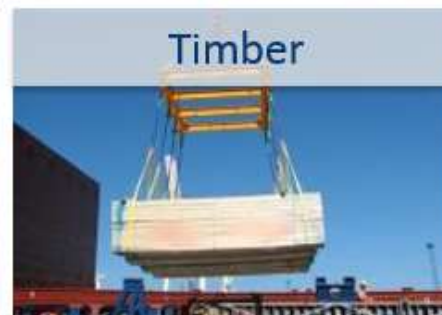


# Evolution through decades



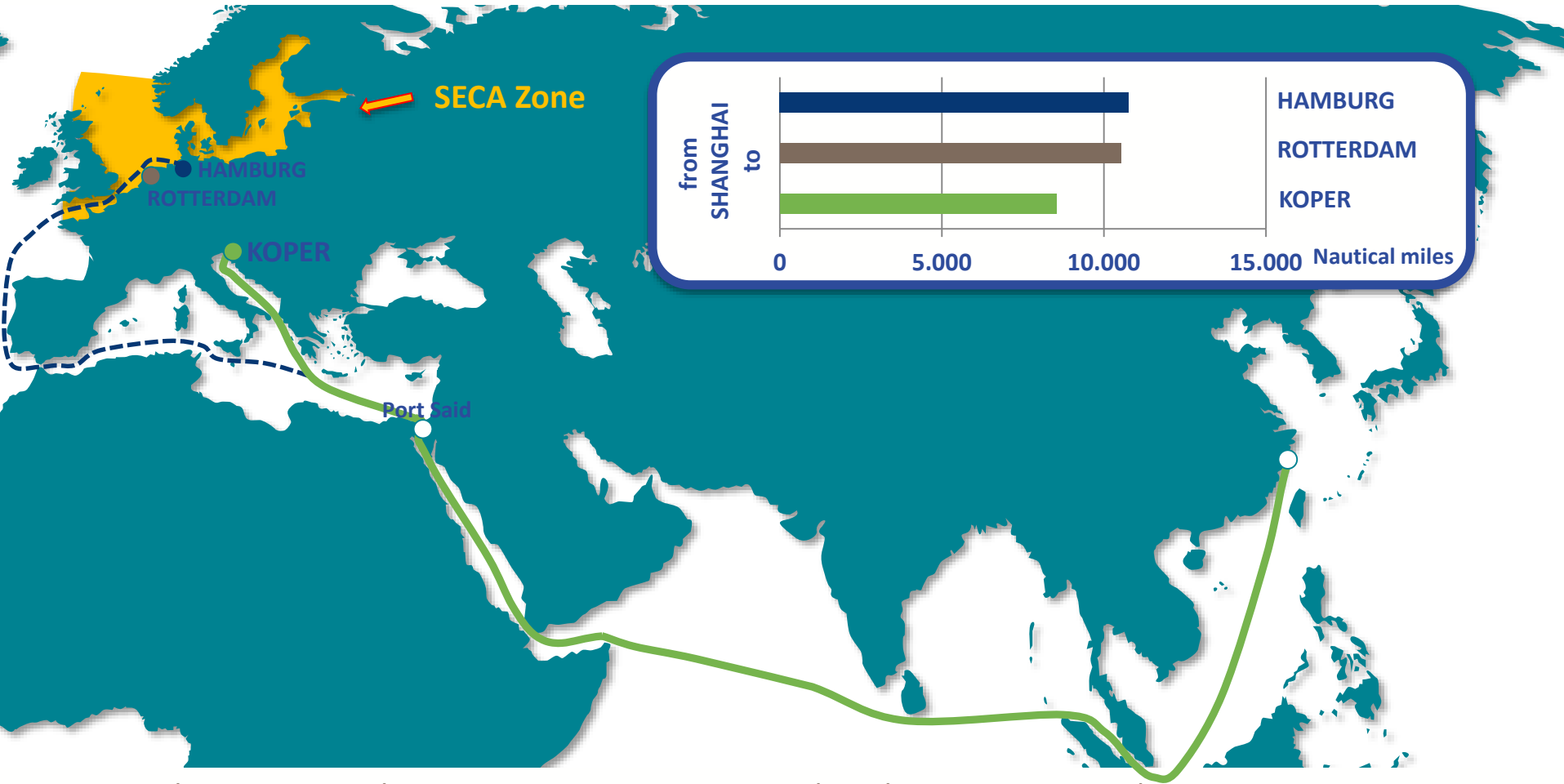
# The port in numbers

- 280 ha of port area,
- 12 specialized terminals,
- 3.4 km of operative quays, 26 berths.





# Efficient combination of cost, time and energy savings



- more than 2.000 Nm shorter maritime route – up to 7 days shorter transit time by sea (if “slow steaming” at 12 knots)
- shipping 1 container (18 gross ton) from Far East (Shanghai) to Koper saves approx. 1.040 kg of CO<sub>2</sub> (source: <http://www.poferrymasters.com/about-us/the-environment/co2-emission-calculator>)
- alternative route to Europe (impact of SECA Regulation effective on 1st January 2015 in Baltic Sea, North Sea and English Channel)

# Maritime connections

- regular **container, Ro-Ro** and **conventional** connections with all continents,
- numerous tramper, tanker and other dedicated services,
- more than 50 operators calling Koper on regular basis,

## Regular container services

-  weekly direct services with major Far East and SE Asian ports
-  weekly Intra-Mediterranean services
-  container services with hub ports



## Direct services from Far East

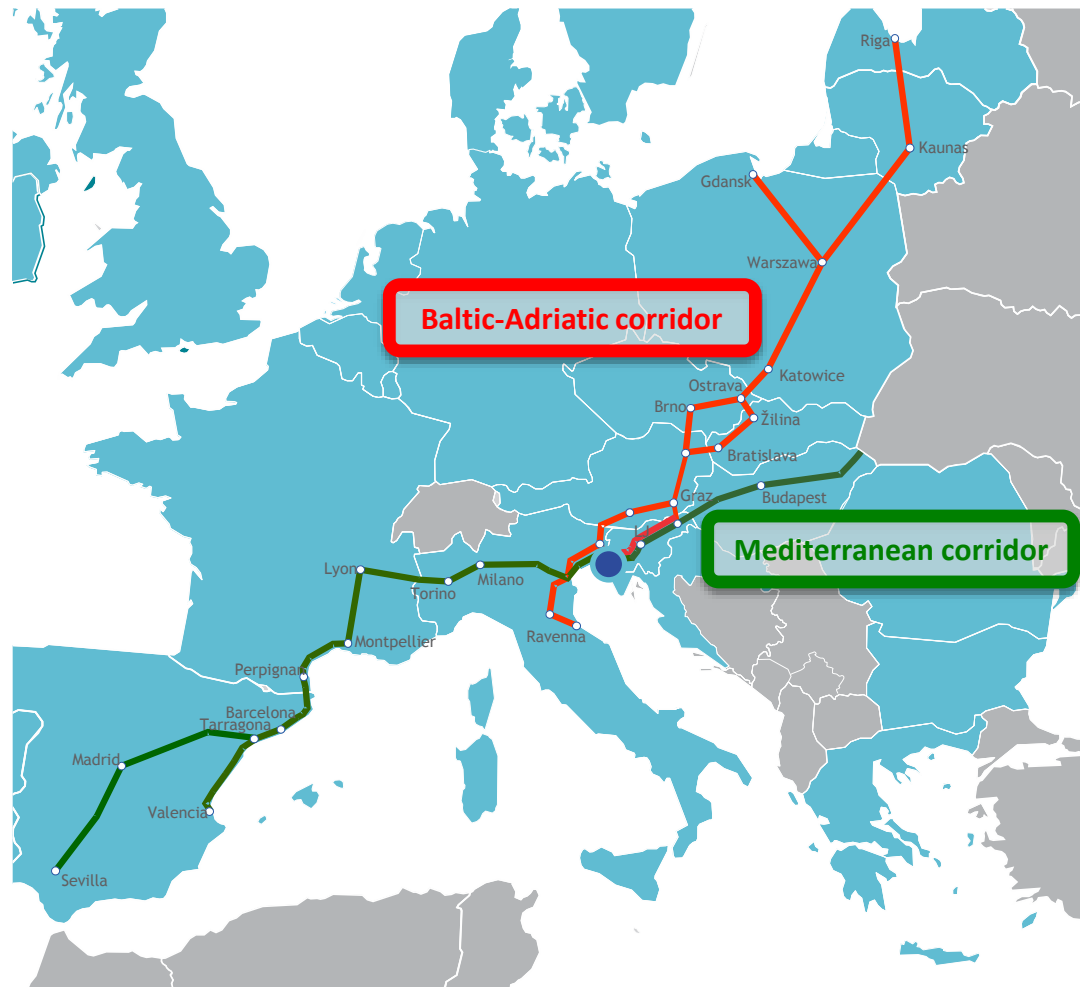
- **2M alliance**, Maersk Line + MSC (Koper as 1st port of call)
- **Ocean3 alliance**, CMA-CGM, CSCL, UASC (Koper as first and last port of call)
- **CKYHE Alliance**, COSCON, “K” Line, Yang Ming, Hanjin and Evergreen Line + MOL + CSCL





# On strategic crossroads

- on the crossroad of Baltic-Adriatic corridor and Mediterranean corridor,
- recognized as a core EU port (within TEN-T regulations).



# Hinterland rail & road connections

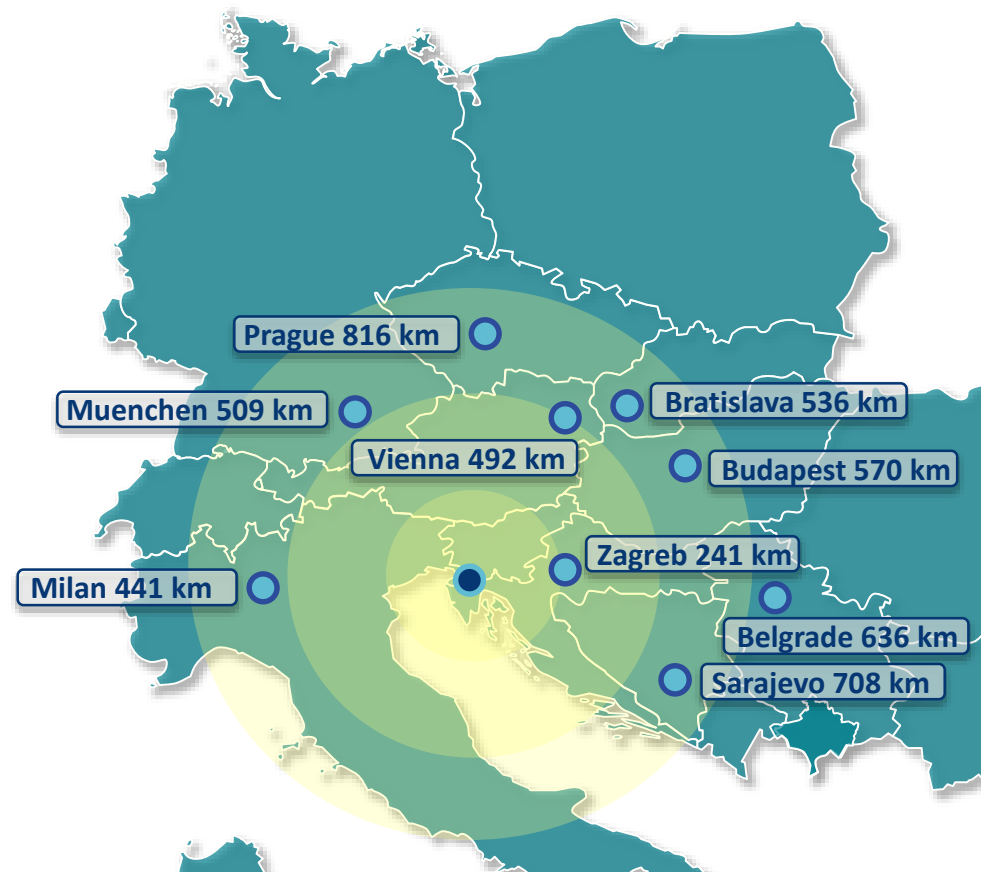
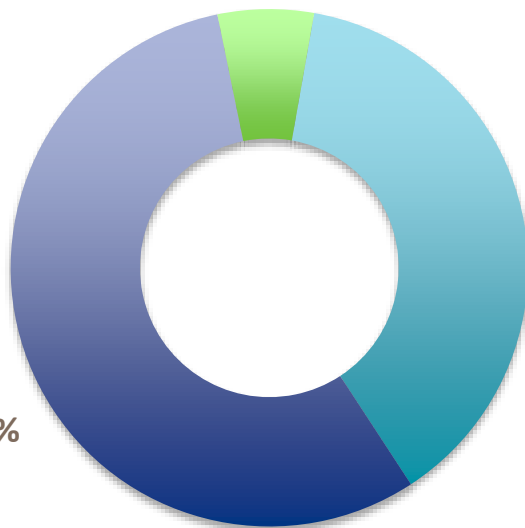
- excellent railway connections to hinterland markets,
- modern highway network,
- business centres of surrounding hinterland markets can be reached from the Port of Koper by **road in less than 1 day** and by **train in less than 2 days**.
- an average of 62 trains / day in 2015.

## Modal split

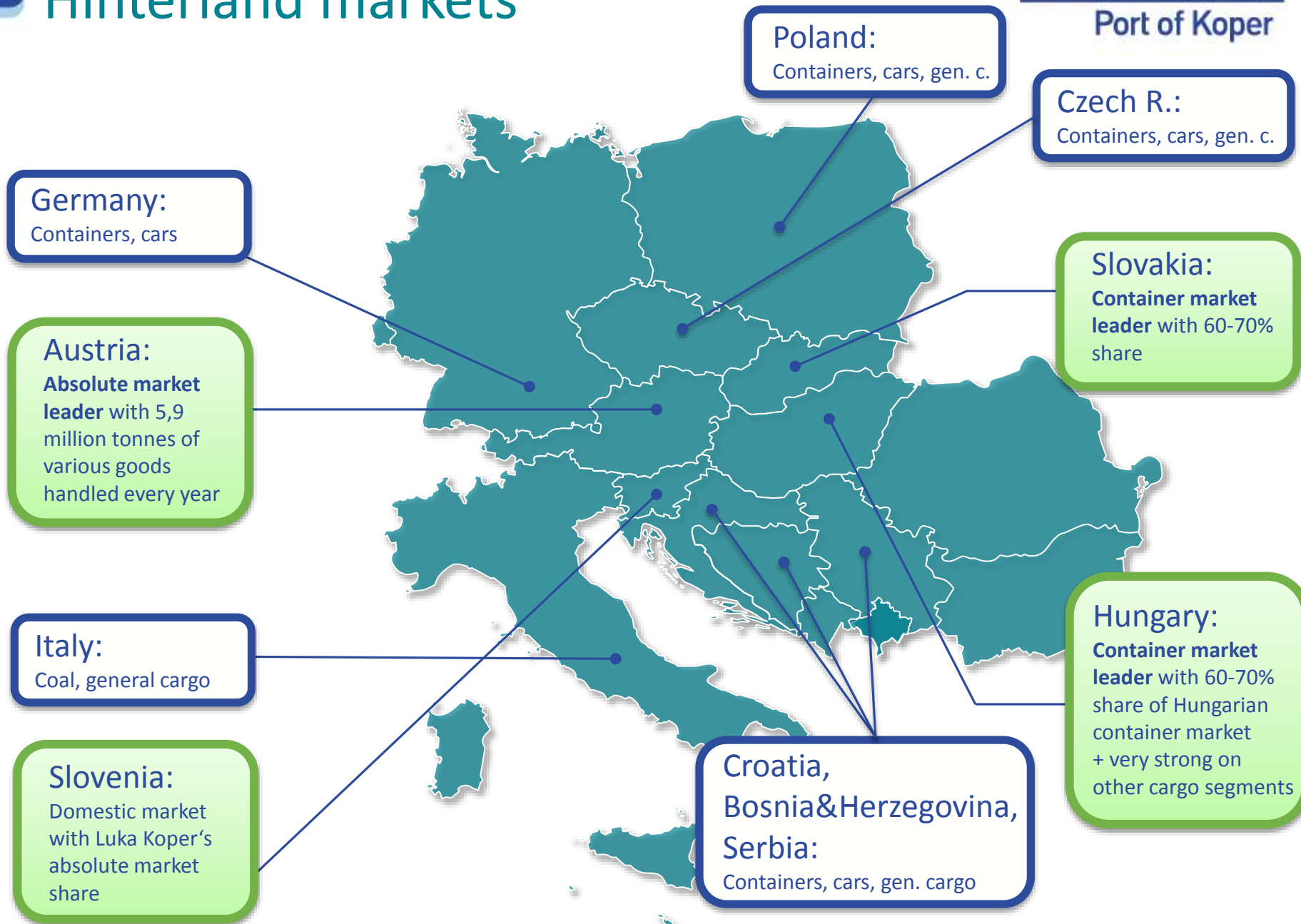
Transshipment; 6%

Road; 38%

Rail; 56%



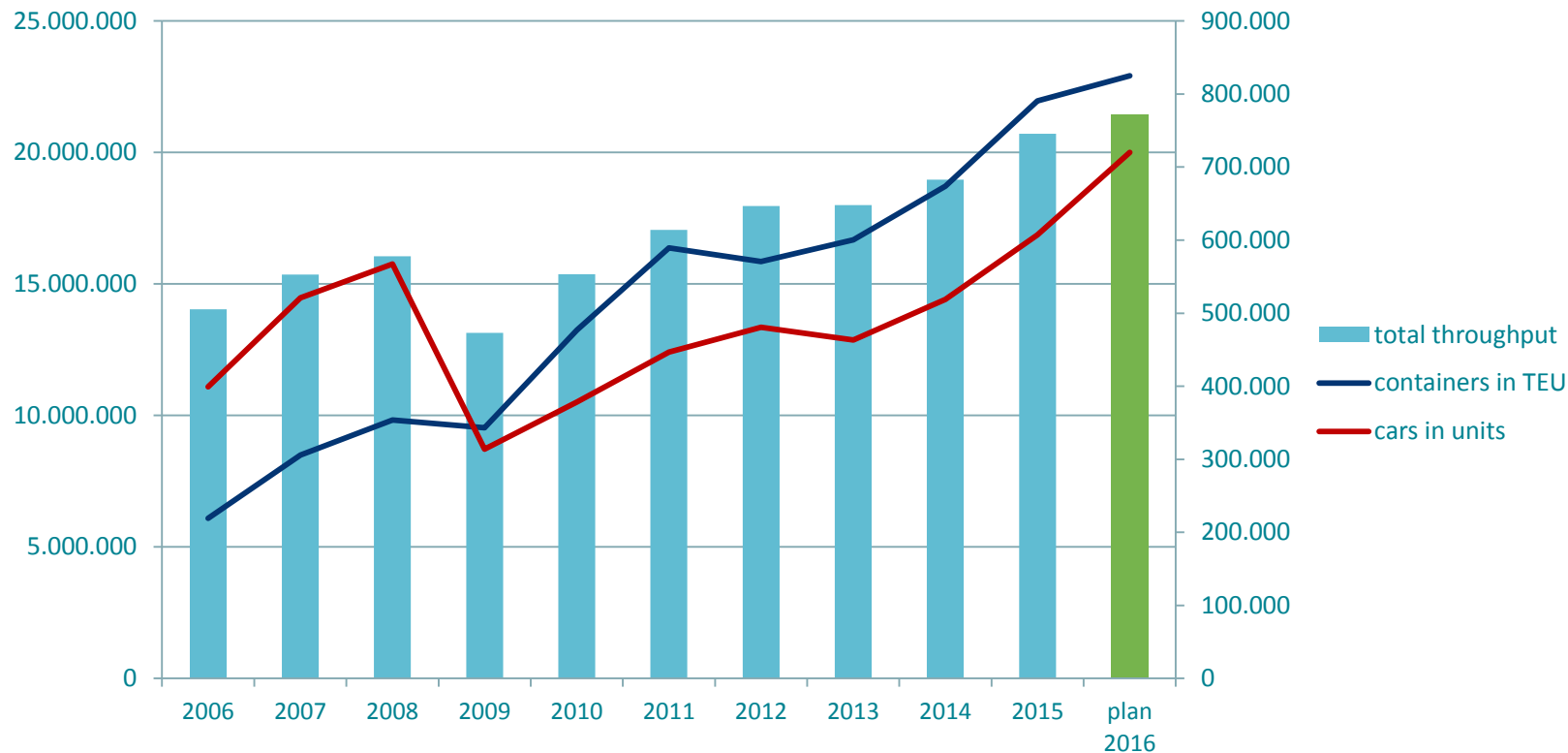
# Hinterland markets





# Multipurpose port

with strategic focus on containers and cars

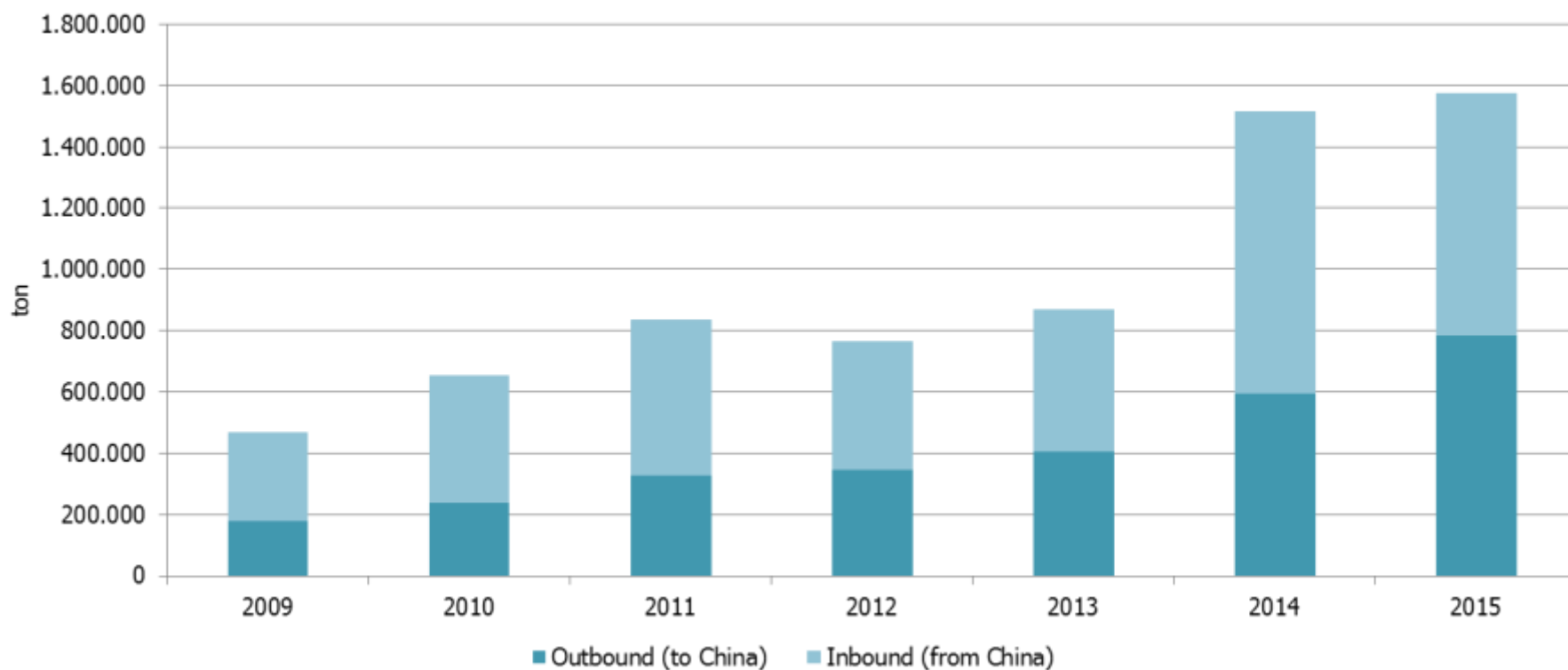


| Throughput              | Plan 2016 | Estimation 2020 | Development: 2030* | Alternative: 2030 |
|-------------------------|-----------|-----------------|--------------------|-------------------|
| <b>Total (tonnes)</b>   | 21,4 mln  | 24,3 mln        | 35,1 mln           | 27,4 mln          |
| <b>Containers TEU)</b>  | 825,000   | 1,000,000       | 2,000,000          | 1,300,000         |
| <b>Vehicles (units)</b> | 720,000   | 850,000         | 1,250,000          | 865,000           |

\*subject to: double railway line Koper - Divača

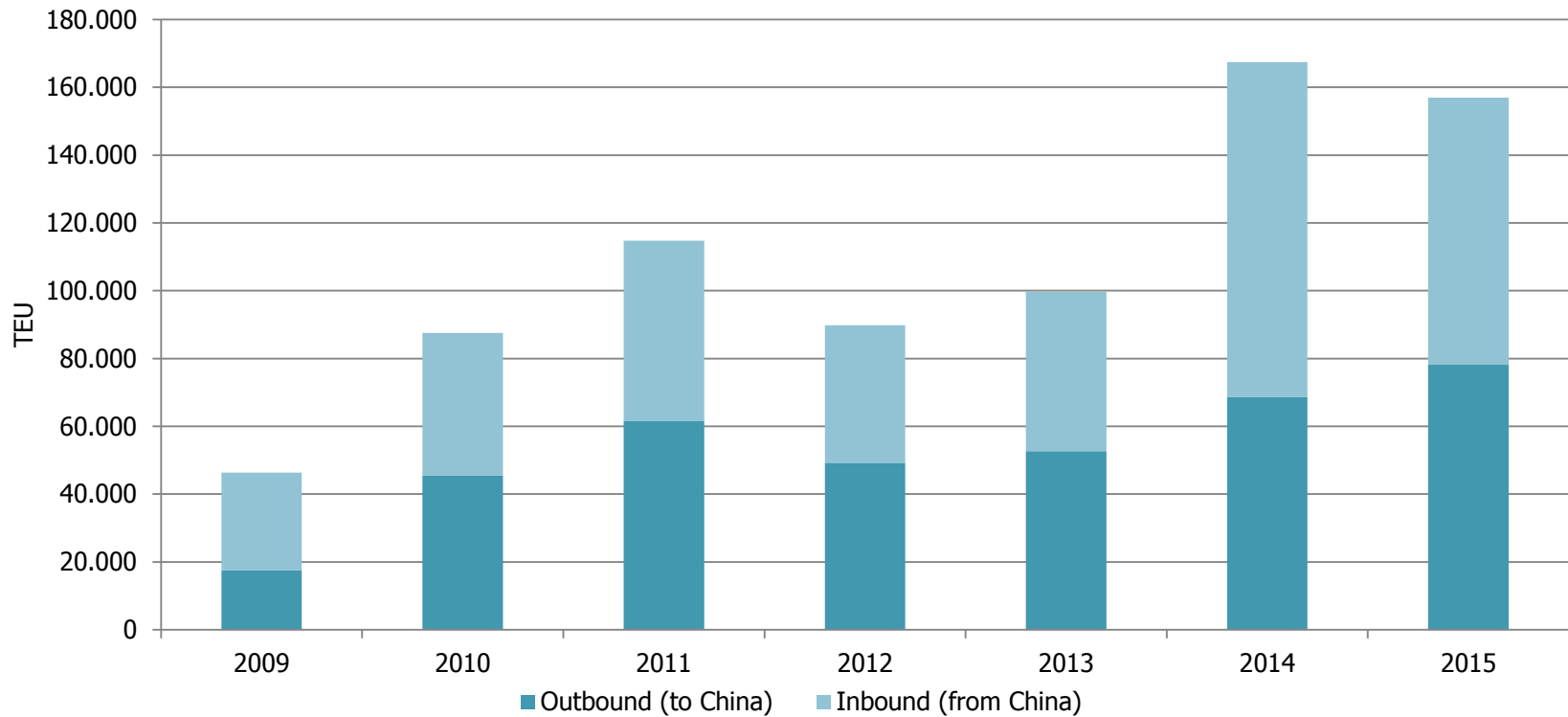
# Chinese overseas traffic through Koper

Total cargo volume via Koper – 1.576.278 tones in 2015

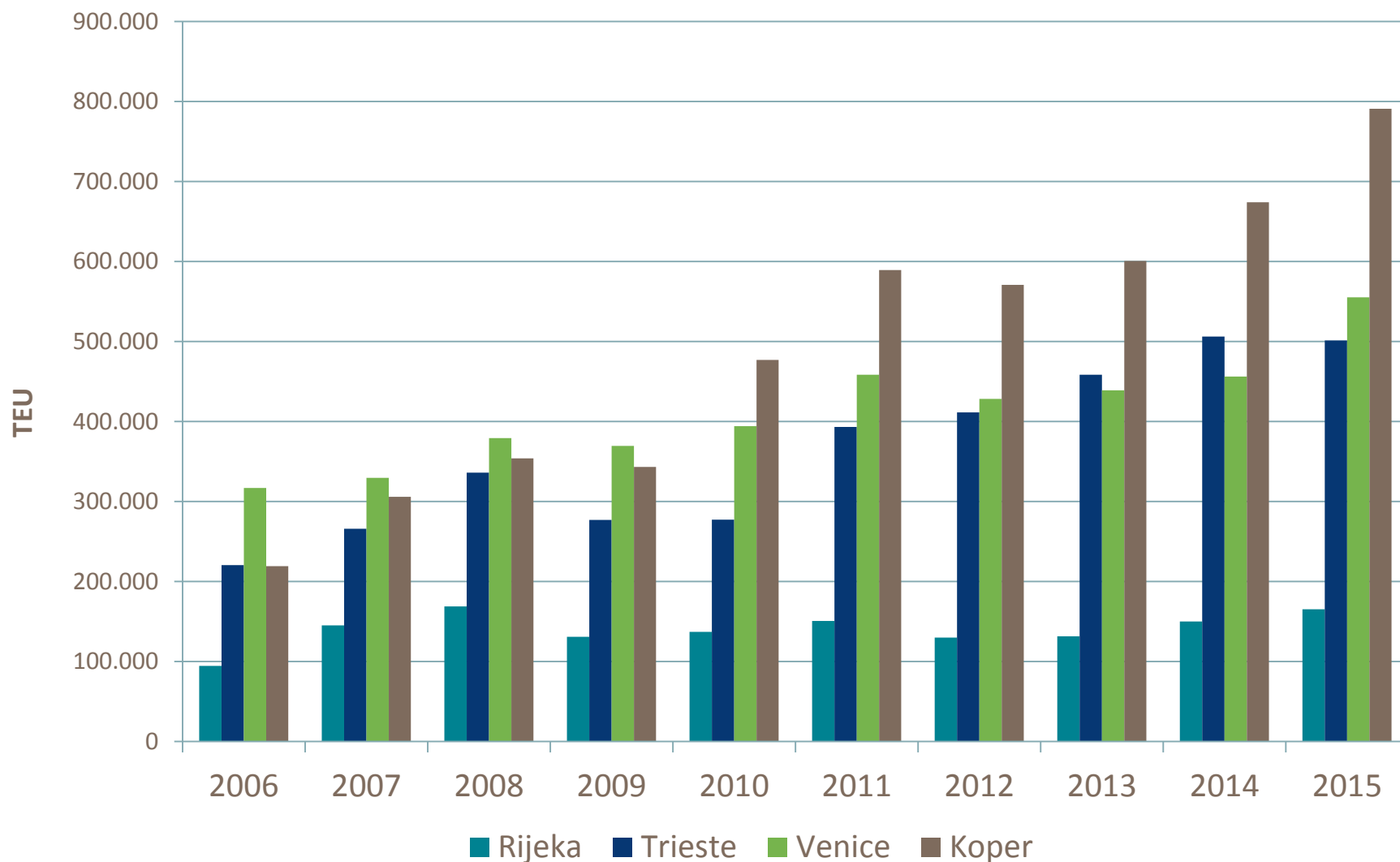


# Chinese container traffic via Koper

Traffic in 2015: 157.002 TEU



# Leading container port in North Adriatic area





# Growth comparison 2014/2015 in TEU

| In TEU millions             | 2015  | 2014  | %15    |
|-----------------------------|-------|-------|--------|
| Rotterdam                   | 12.23 | 12.30 | -0.5%  |
| Antwerp                     | 9.65  | 8.98  | 7.5%   |
| Hamburg                     | 8.87  | 9.78  | -9.3%  |
| Bremerhaven                 | 5.55  | 5.80  | -4.3%  |
| Valencia                    | 4.62  | 4.44  | 3.9%   |
| Algeciras                   | 4.51  | 4.57  | -1.2%  |
| Felixstowe                  | 3.98  | 4.07  | -2.3%  |
| Piraeus                     | 3.33  | 3.59  | -7.2%  |
| Marsaxlokk                  | 3.10  | 2.87  | 8.0%   |
| Ambarli                     | 3.08  | 3.44  | -10.6% |
| Le Havre                    | 2.56  | 2.55  | 0.1%   |
| Gioia Tauro                 | 2.55  | 2.97  | -14.2% |
| Genoa                       | 2.24  | 2.17  | 3.2%   |
| Southampton                 | 2.02  | 1.90  | 6.6%   |
| Barcelona                   | 1.97  | 1.89  | 3.8%   |
| St Petersburg               | 1.72  | 2.38  | -27.8% |
| Zeebrugge                   | 1.56  | 2.05  | -23.8% |
| Mersin                      | 1.44  | 1.48  | -2.9%  |
| La Spezia                   | 1.39  | 1.30  | 6.7%   |
| Sines                       | 1.33  | 1.23  | 8.5%   |
| Total Top 20 European ports | 77.68 | 79.75 | -2.6%  |

## Koper vs Top 20 European ports

Average European ports: -2,6 %  
Koper: +17,3 %

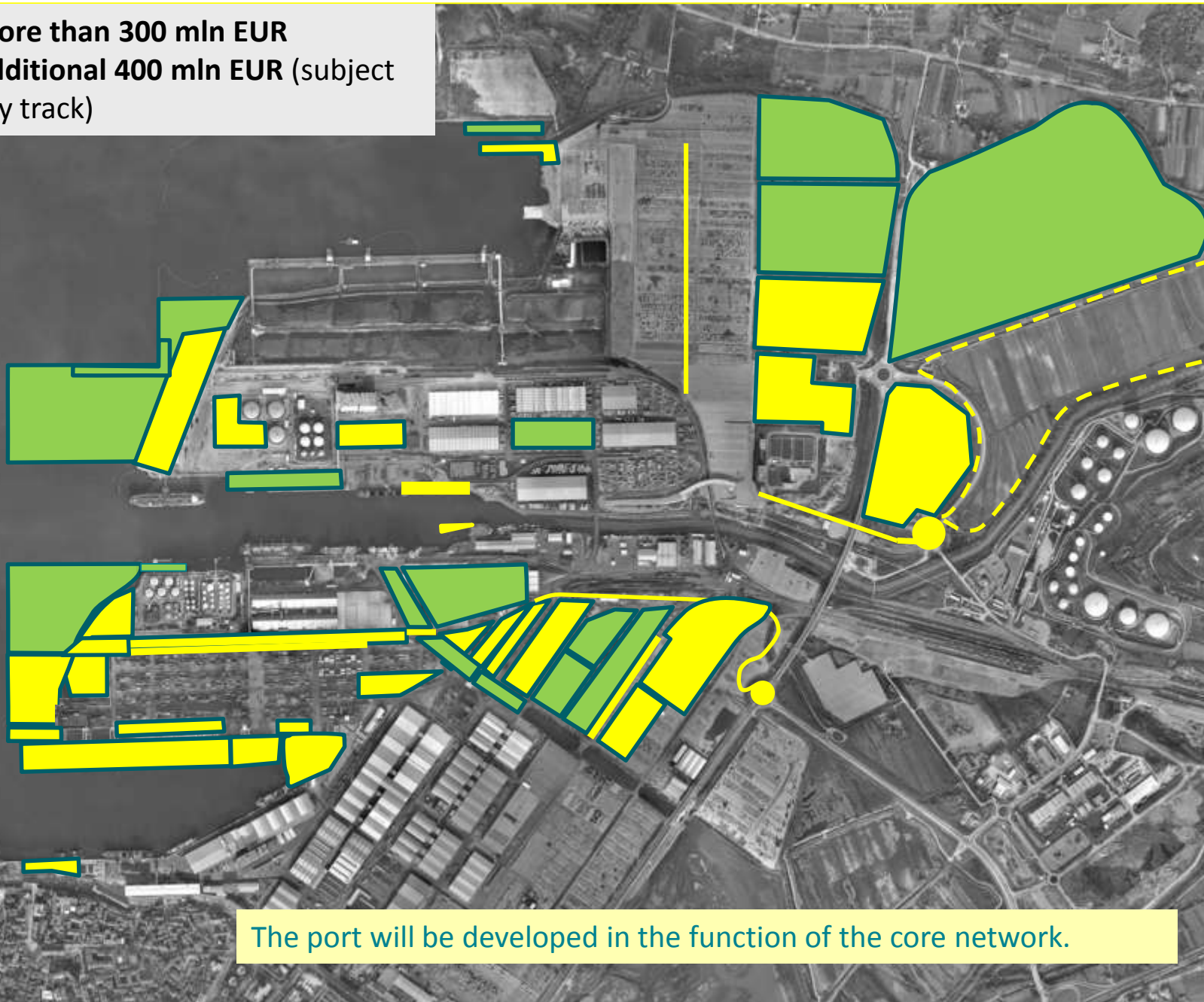
## Koper vs North Adriatic ports:

Koper: +17,3 %  
Rijeka: +7,4 %  
Trieste: -1,0 %  
Venice: + 21,7 %

Investments in port development till 2020

Investments in port development till 2030

- **2016 – 2020:** more than 300 mln EUR
- **2021 – 2030:** additional 400 mln EUR (subject to double railway track)



The port will be developed in the function of the core network.

# Main strategic projects until 2020

Container terminal – 235 M €



Car terminal – 24,7 M €



Liquid bulk terminal – 13,9 M €



Multipurpose warehouse – 42 M €





# The green and sustainable port

- **National Spatial plan** / long-term solution with sustainable development
- **Green port** – a lot of greenery inside the port area, with olive trees
- Acting **socially responsible** and supporting local community – more than 1 million EUR for sponsorships and donations in 2014
- **Open for public** with more than 20,000 visitors every year
- Sustainable development portal **Living with the port** – [www.zivetispristaniscem.si](http://www.zivetispristaniscem.si)



# Why Port of Koper?

- quality, reliability and flexibility,
- non-stop handling operations (24/7),
- developed hinterland connections,
- provision of tailor-made services,
- effective IT support connecting all port community,
- ISPS code compliant – security,
- full support of customs authorities (simplified customs procedures and pre-clearing),
- EU border inspection point; possibility of fiscal clearance and fiscal warehousing,
- up-to-date handling equipment and technology,
- good references.

