

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?



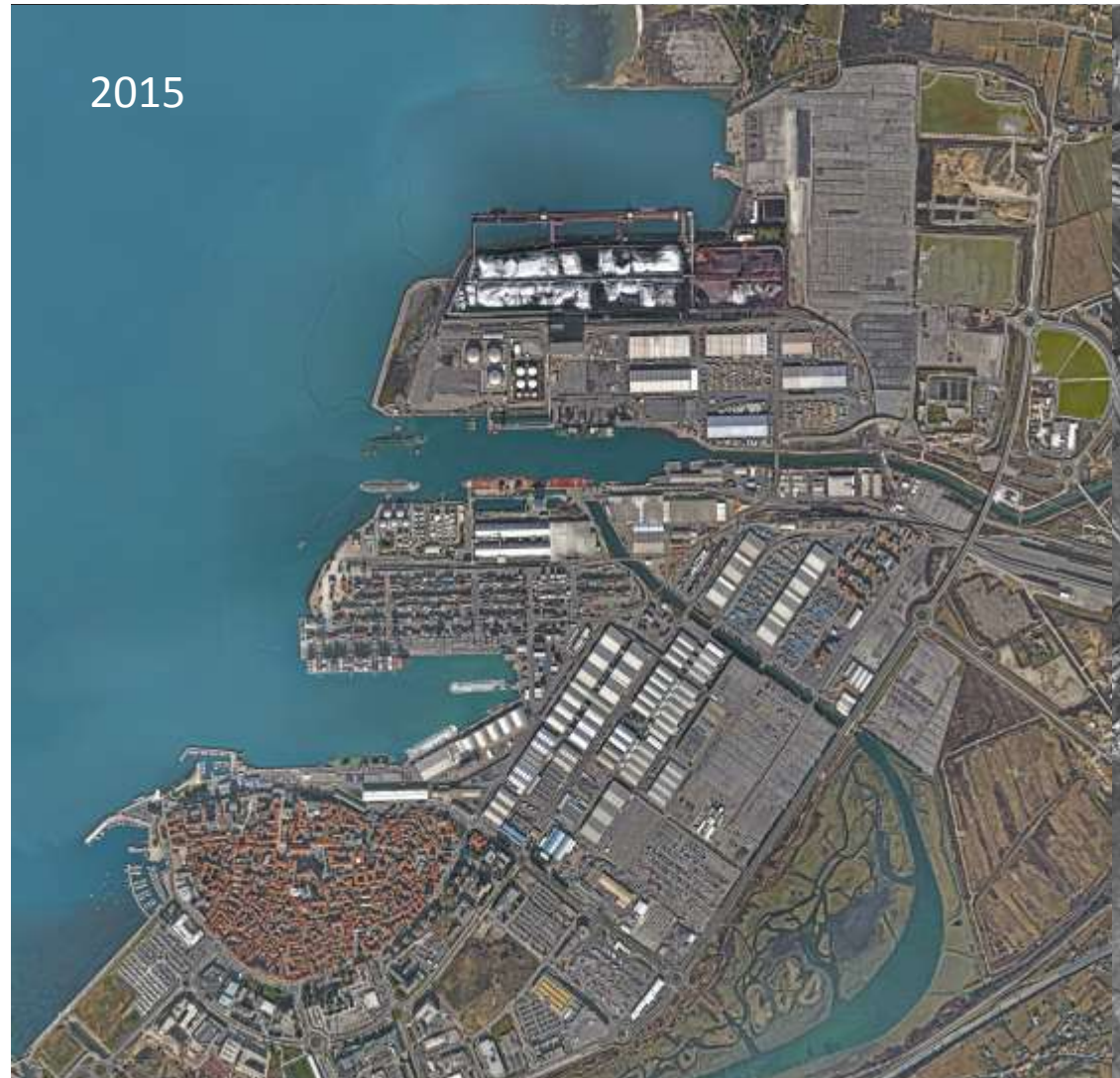
About the company Luka Koper, d.d.

- 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,
- 1st largest container terminal in Adriatic,
- 2nd 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.



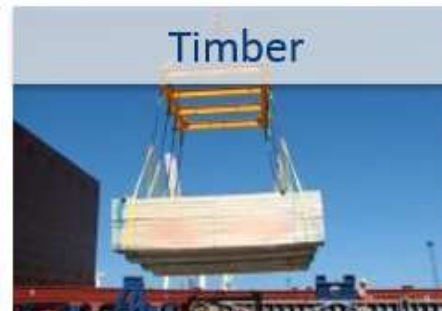
BV - NON GMO certified
BV – EKO/BIO certified

Evolution through decades

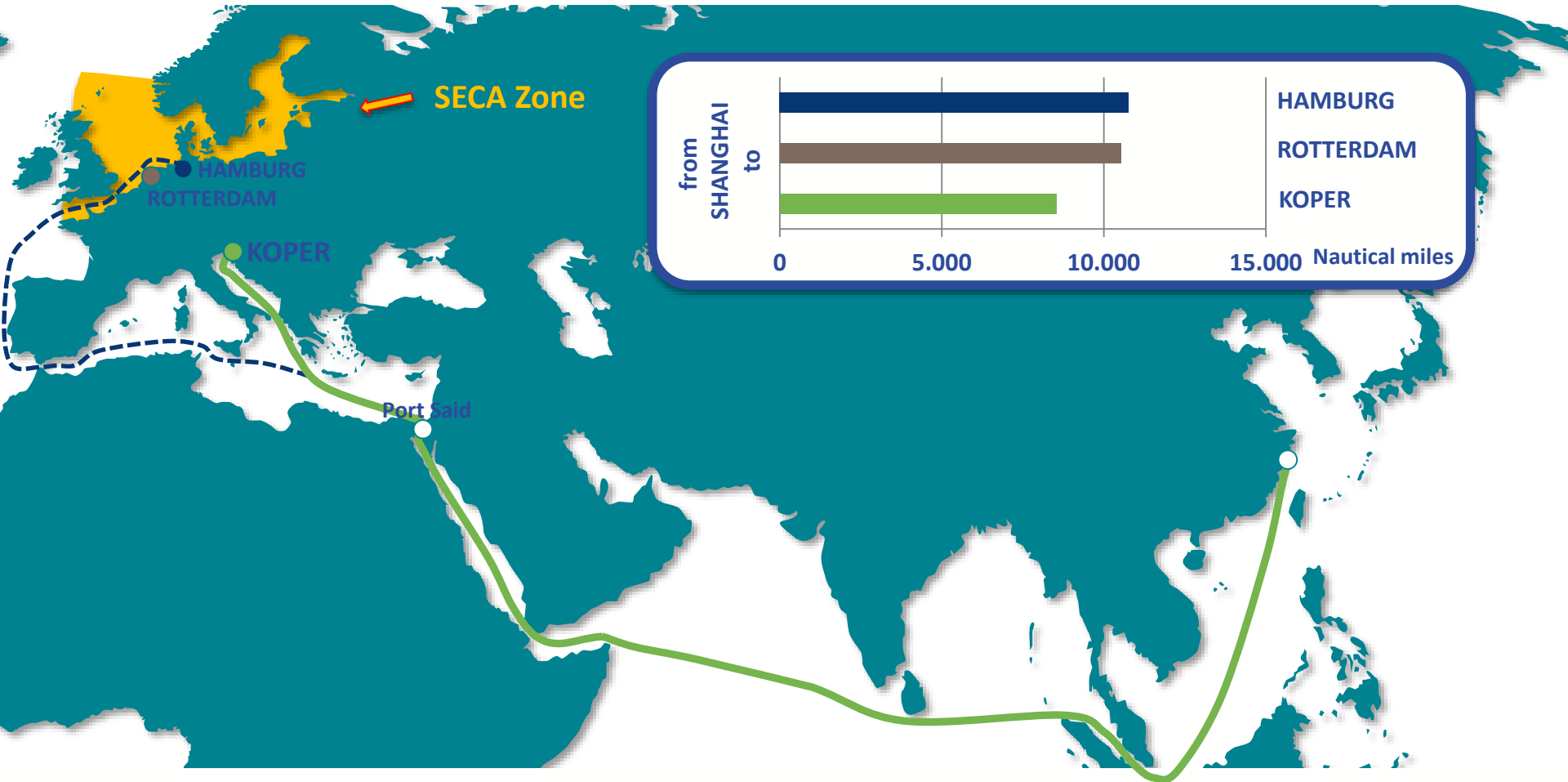


The port in numbers

- 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 CO₂ (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



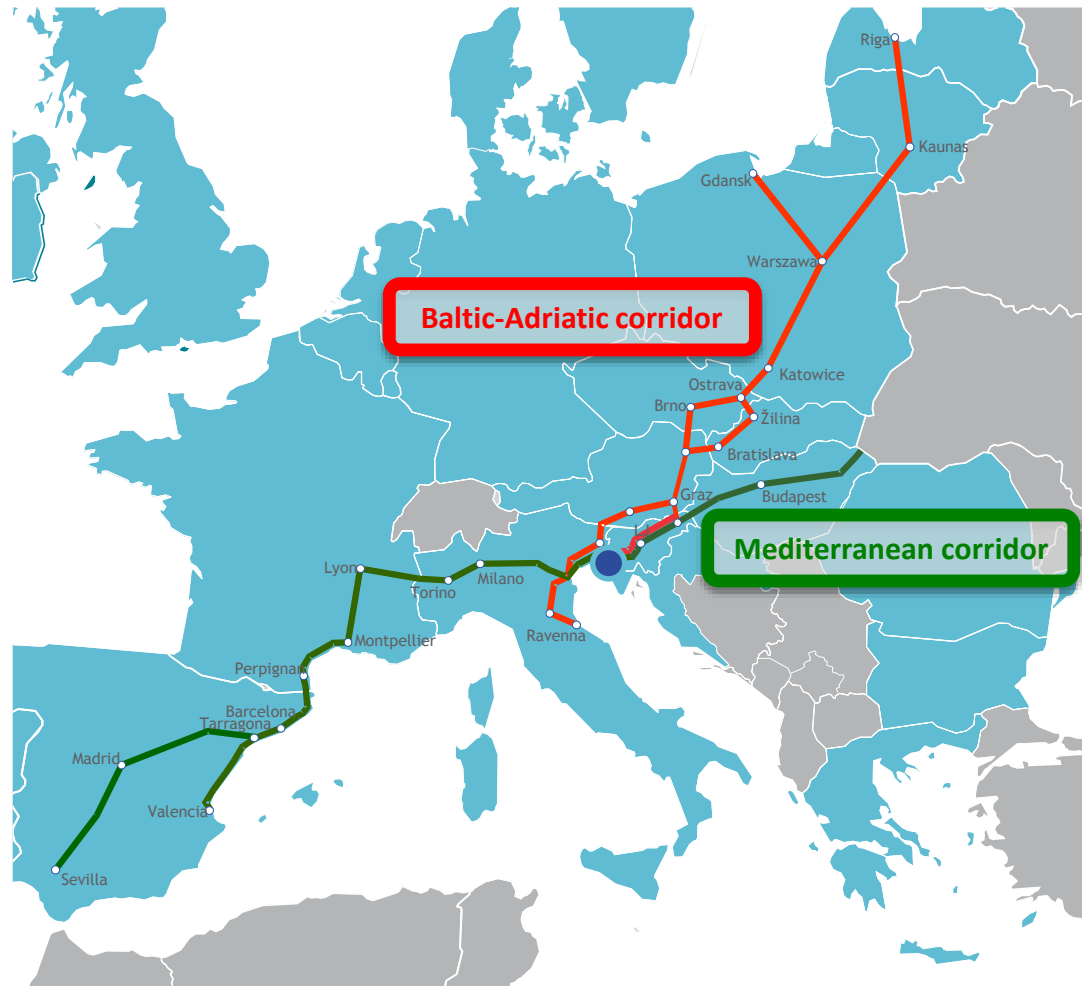
Direct services from Far East

- **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).

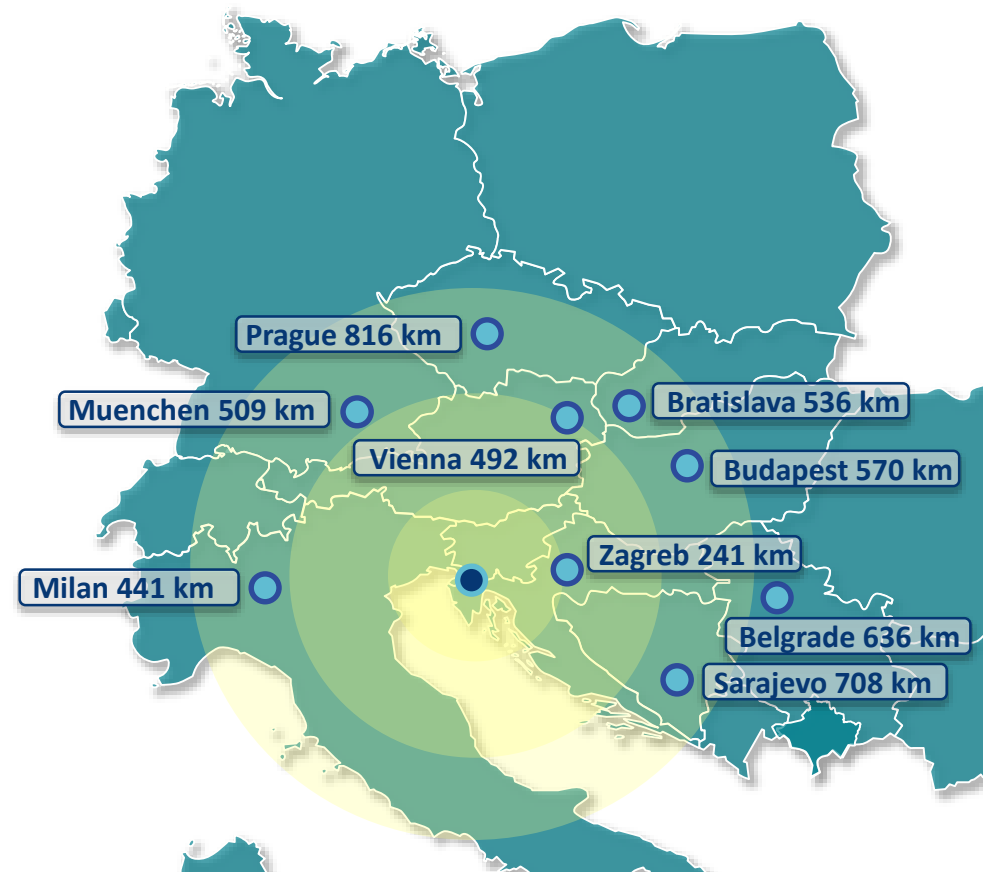
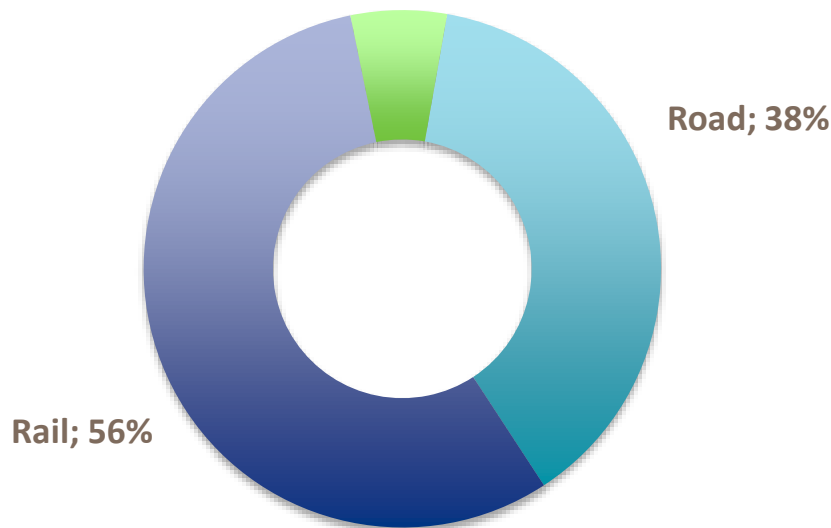


Hinterland rail & road connections

- 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%



Hinterland markets



Germany:

Containers, cars

Austria:

Absolute market leader with 5,9 million tonnes of various goods handled every year

Italy:

Coal, general cargo

Slovenia:

Domestic market with Luka Koper's absolute market share

Poland:

Containers, cars, gen. c.

Czech R.:

Containers, cars, gen. c.

Slovakia:

Container market leader with 60-70% share

Hungary:

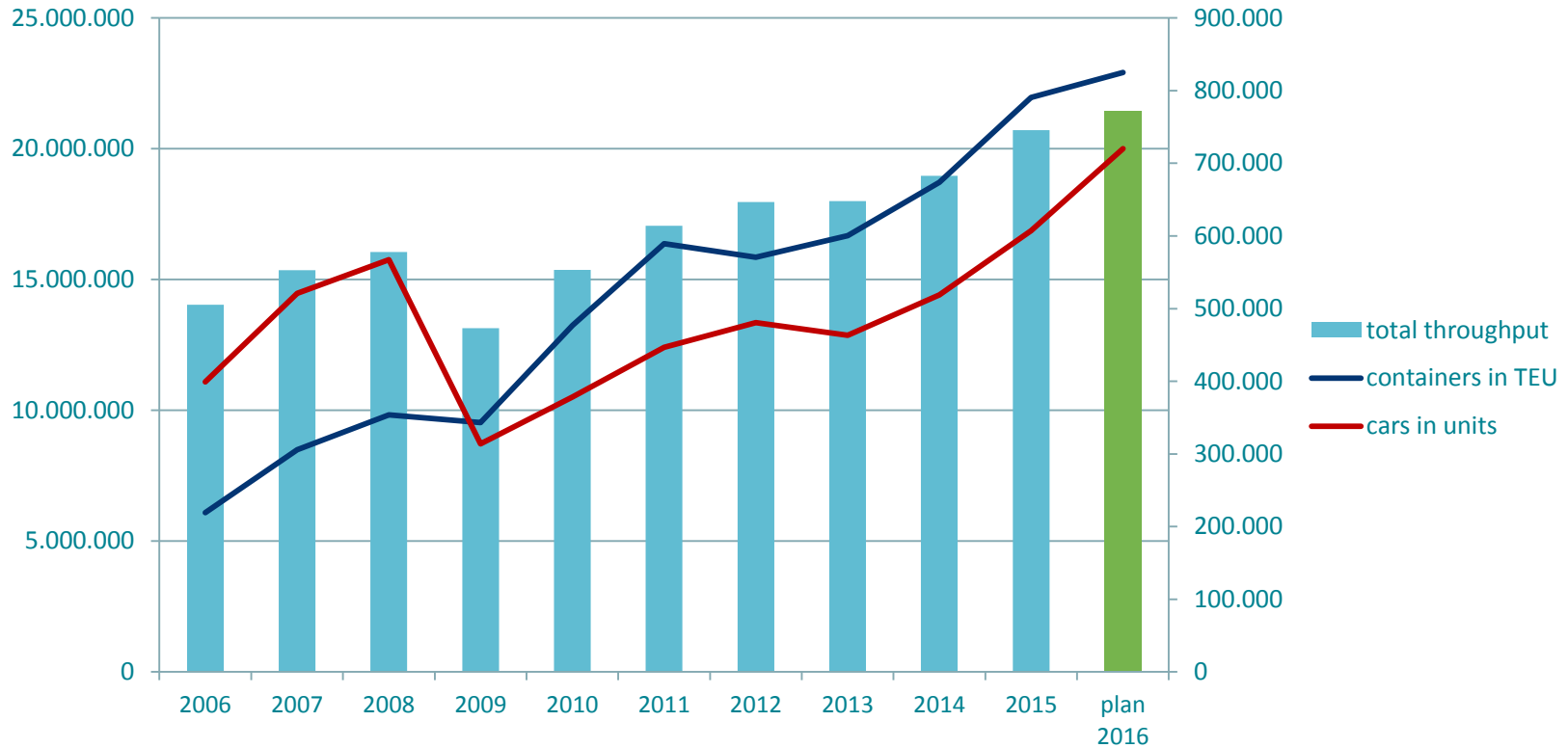
Container market leader with 60-70% share of Hungarian container market + very strong on other cargo segments

Croatia, Bosnia&Herzegovina, Serbia:

Containers, cars, gen. cargo

Multipurpose port

with strategic focus on containers and cars

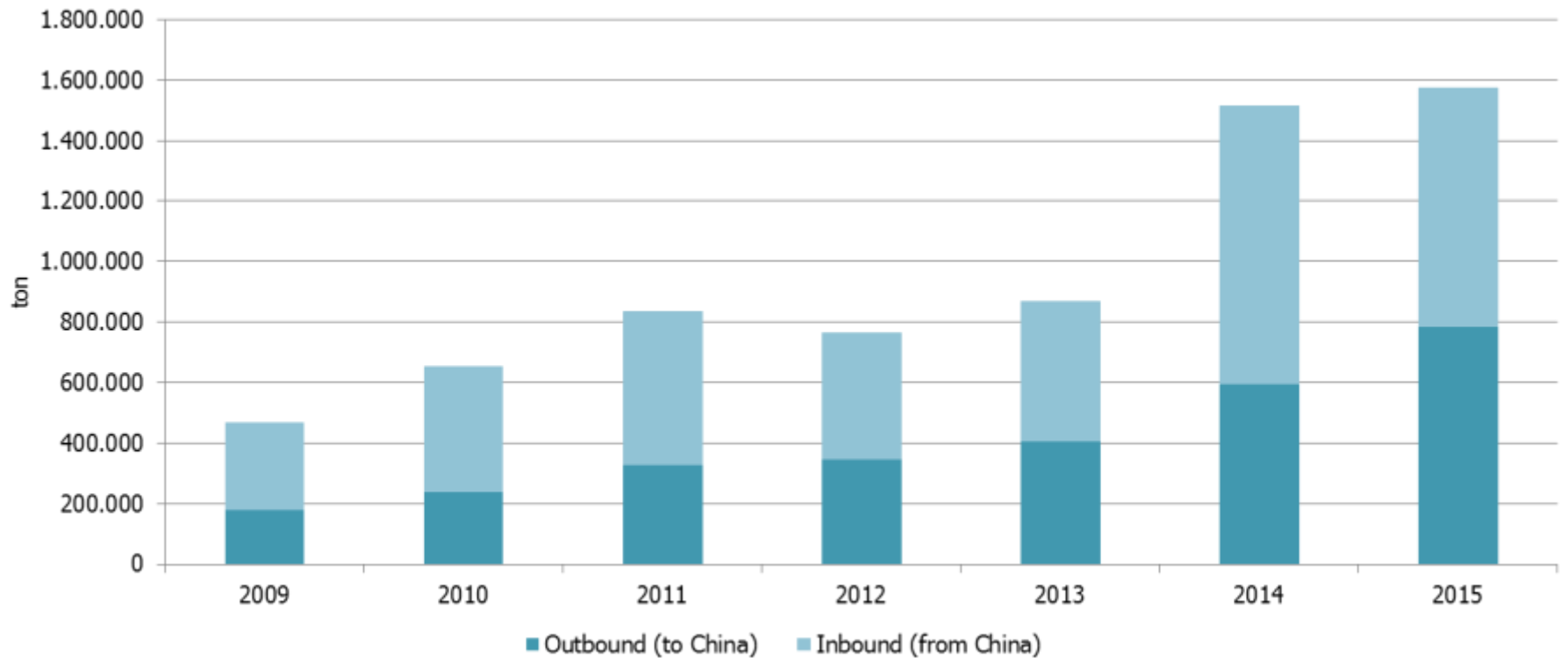


Throughput	Plan 2016	Estimation 2020	Development: 2030*	Alternative: 2030
Total (tonnes)	21,4 mln	24,3 mln	35,1 mln	27,4 mln
Containers TEU)	825,000	1,000,000	2,000,000	1,300,000
Vehicles (units)	720,000	850,000	1,250,000	865,000

*subject to: double railway line Koper - Divača

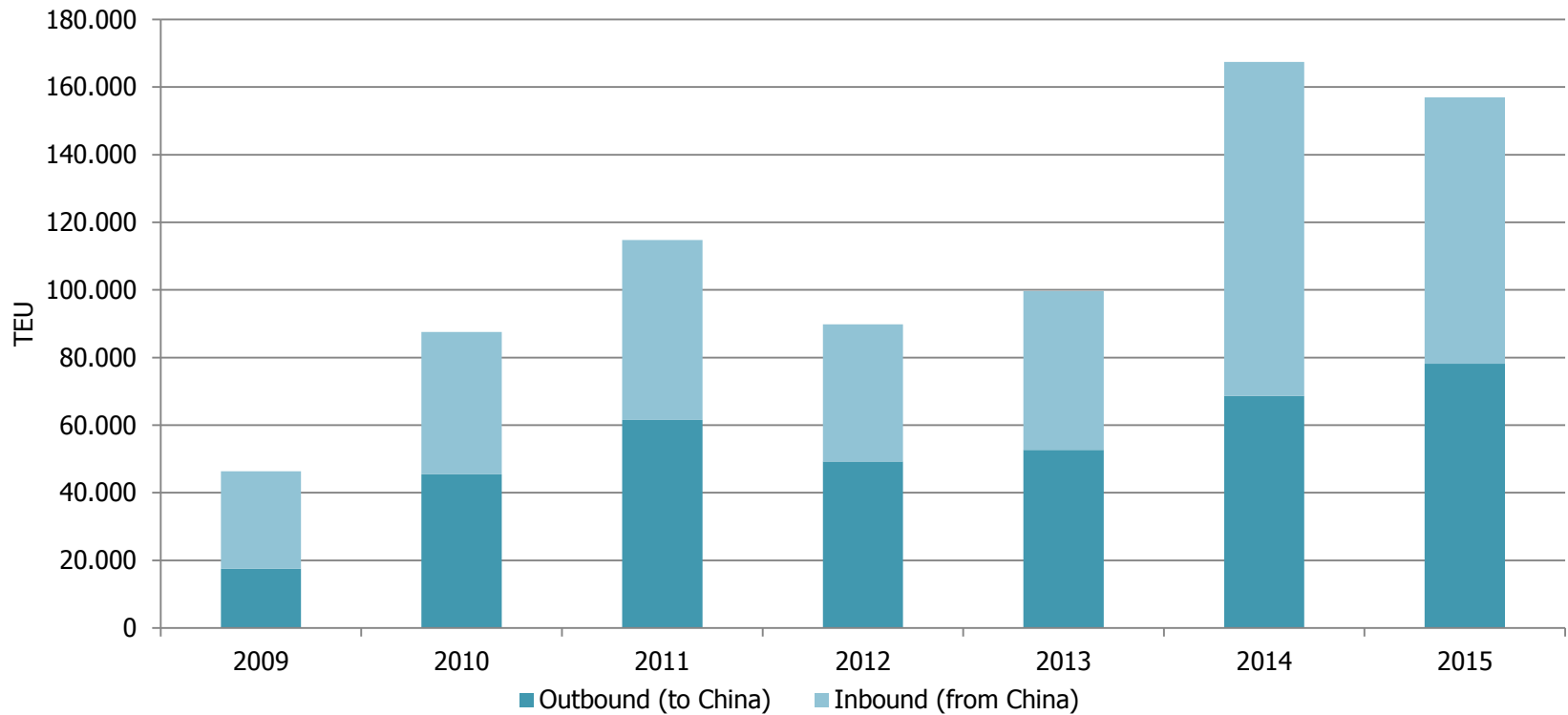
Chinese overseas traffic through Koper

Total cargo volume via Koper – 1.576.278 tones in 2015

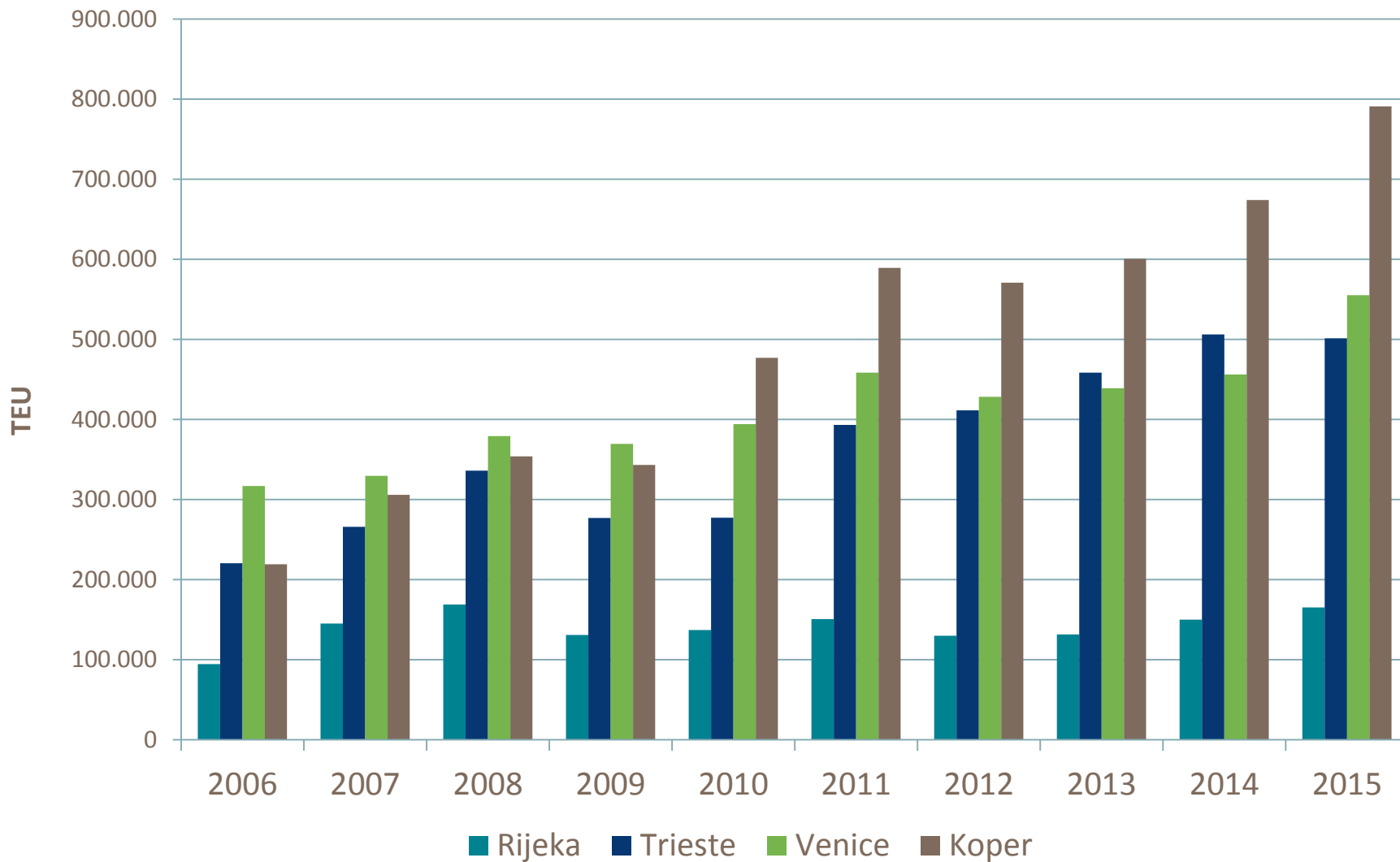


Chinese container traffic via Koper

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



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.

