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## 1. Introduction

The Mediterranean and the Black Sea are two almost closed sea basins bordering the European Union's coasts. As these basins are situated at the crossroads of several continents, they are also business and trading areas for the Member States and particularly for the respective coastal states and their coastal regions.

The EU has almost 40 000 km of Mediterranean coastline. The Mediterranean is also a major shipping channel, with almost a third of all international cargo traffic passing through it. The Mediterranean is a key world maritime route with 30 % of worldwide traffic, 25 % of oil transport, and 450 ports and terminals. In this area of intense maritime traffic, important maritime safety mechanisms have been implemented: rescue operations, anti-pollution devices, etc. They are coordinated by the European Maritime Safety Agency.

In addition, around 50 000 ships sail through the Bosphorus every year, including at least 10 000 oil tankers. The transport of oil and gas is also a key activity in the Black Sea, now generally based on tankers.

The hectic shipping and short sea activity in the East Med basin and the Black Sea is supported by an array of operators of various organisation sizes, but with one goal in mind – that of providing the most efficient and effective way to transport cargo to the industry. This report tries to give a snapshot of main players in the principal countries of this region, supported by relevant data and developments.

## **2.MALTA**

### **OPERATORS**

Although Malta's ship register is one of the largest worldwide, Maltese ship operators are rather limited, with only 3 companies that can be considered as such namely Gozo Channel, Virtu Ferries, and Malta Motorways of the Sea.

### **GOZO CHANNEL**

Gozo Channel provides a vital "LIFE LINE" between the islands of Malta, the mainland, and Gozo. Its modern fleet includes three state of the art ferries, M.V. Ta' Pinu (delivered March 2000), M.V Gaudos (delivered February 2001), and M.V. Malita (delivered March 2002). Passenger and vehicle service is provided all the year-round between Mgarr Harbour (Gozo) and Cirkewwa (Malta) including Saturdays, Sundays and Public Holidays together with a night service throughout the year.

Gozo Channel offers a comprehensive Roro Passenger Service for foot passengers, car and car passengers as well as cargo vehicles, including hazardous cargo.

Gozo Channel was formed in 1979, to maintain, develop, and operate a sea transport service to and from Malta, Gozo and elsewhere which, by the carriage of passengers, freight and mail, will serve the national economy and interest of the Maltese Islands.

The overriding business strategy for Gozo Channel is to provide an economic, efficient, profitable, reliable and safe service to Gozo and for the Company's customers. Management has identified a number of key elements which will assist the Company achieve its objectives. These include:

- Safety, quality and environmental protection;
- Offering competitive and reasonable prices and complying with the social obligation aspect required of the Company;
- Basing the Company's strategy on a marketing and customer care orientation.

The Company's first vessels to operate the route were the M/V Ghawdex (purchased in early 1979) the M/V Melitaland and M/V Mgarr (both purchased in early 1980). Initially, these vessels performed an average of eight (8) round trips per day.

With diversification in mind, a seasonal service to Sicily was introduced in June 1981 with the M/V Ghawdex. The Company operated up to three (3) weekly trips to Siracuse, Catania and eventually Pozzallo and the service became very popular among local Maltese and Gozotan wishing to spend a day or more in Sicily. The service was discontinued in 1995.

As the traffic between Malta and Gozo increased, more vessels were introduced into the service to cope with the demand, and by 1990 the Company was operating five (5) vessels, including a fast ferry service between Mgarr, Sliema and Sa Maison, and performing an average of 27 round trips per day. In that year the Company carried 1.93 million passengers and 370,000 cars.

In the mid 90s, the Company embarked on a very ambitious programme - the modernisation of the fleet. Plans for the construction of three ro-ro vessels at the Malta Shipbuilding were finalised. The first vessel, the M.V. Ta' Pinu, was introduced into service in March 2000, whilst the second ship, the M.V. Gaudos entered into service in February 2001. The third vessel, the M.V. Malita, was delivered in March 2002. All vessels have state of the art technology.

In line with the ongoing modernisation programme, the Company introduced various customer care initiatives. Customer orientation became the order of the day. This is reflected in the slogan adopted by the Company: 'A Service to Gozo and for our Customers'.

Today, Gozo Channel has become one of the leading local maritime companies in Malta, with over 240 employees. On average, the company performs 19,000 trips a year, and ferries around 3.5 million passengers and 900 thousand vehicles annually between the two Islands.

As shown by its history, over the coming years, the Company will continue to strive to improve its service in line with the development of Gozo and the demands of its customers.

### Ferry Fleet Guide

Gozo Channel operates the largest ferry fleet in the Maltese islands. Three ferries cruising between Gozo and the mainland Malta, carry over 3.3 million passengers annually. It is the 'LIFE LINE' of Gozo, acting as a marine highway for commercial users, tourists and the daily commuters alike.

There are around 240 dedicated employees who have contributed to make the transit between the sister islands a most pleasant and enjoyable experience.

In the fleet, the Master supervises the entire ship's operation from the bridge, which is the communications and navigation center of the vessel. The First Officer assists the Master with the operation of the vessel, including loading and unloading operations. Except when docking or in tight quarters, the steering of the ship is generally left to the bosun who follows the directions of the bridge officer. Able-bodied seamen (AB) and ordinary seamen (OS) work as deckhand, directing vehicles, securing lines when the ship docks, acting as lookouts, patrolling the vessel for safety hazards and cleaning of the vessel.

Beneath the car deck, the engine room and control center are supervised by the Chief Engineer, who oversees repairs and maintenance to the vessel's mechanical and electrical equipment. The Chief Engineer and the Assistant Engineer also monitor all the control system and in some instances, control the speed of the vessel, in line with the Master's commands. The oiler assists the engineers by physically monitoring the performance of all the machinery, thus ensuring that everything is operating correctly.

It is therefore obvious that the personnel involved in the various categories of work have to adhere to strict standards of professional performance making sure that they are working in unison and executing competently, thereby ensuring an environment which is consistently dynamic.

### RoRo Ferry Service

Gozo Channel operates a RoRo Ferry Service between the Maltese Islands primarily on two main routes - one between Mgarr - Gozo and Cirkewwa - Malta, the other between Mgarr - Gozo and Sa Maison - Malta. Crossings are regular and during peak periods and/or high season they become more frequent to cope with demand.

The Mgarr/Cirkewwa route is oriented to foot and car passengers including private cars, even though commercial vehicles are also carried on this route.

The Mgarr/Sa Maison route is cargo oriented, and normally operates once a day on a return basis, Mondays to Fridays. Passengers and private cars are also carried on this route, the latter when space permits.



### Fleet

- M.V. Gaudos
- M.V. Malita
- M.V. Ta' Pinu



## DIRECT FEEDBACK

In the next 6 months, Gozo Channel is planning to update further their shortsea services. The total shortsea capacity (ro-ro) in ro-ro units of Gozo Channel are as follows:

- Ship 1 MV Ta'Pinu 150 x 620= 93,000
- Ship 2 MV Malita 150 x 620=93,000
- Ship 3 MV Gaudos 80x430=34,400

Gozo Channel operates three ferries which cruise between Gozo and Malta, carrying over 3.3 million passengers annually. The company states that the general state of the market in the last 12 months was positive.

The company stated that according to Malta's National Statistics Office (NSO), despite a decline in ferry crossings, sea transport between Malta and Gozo registered increases in vehicles and commuters in the first quarter of 2013 when compared to the corresponding quarter of 2012. A total of 814,754 passenger trips were recorded between Malta and Gozo, an increase of 5.2% compared to the corresponding quarter last year. The highest number of commuters was recorded in March - 320,031 or 39.3% of the total for the quarter. The number of vehicles carried by scheduled vessels went up by 5.4%, totalling

236,051. Total trips in the period under review stood at 4,582, a decrease of 4.5% over the corresponding period last year. The majority of trips took place in March - 1,596 or 34.8% of total trips for the first quarter.

Moreover, in the second quarter, sea transport between Malta and Gozo registered increases in vehicles, commuters and trips when compared to the corresponding period last year, according to NSO. A total of 1,150,990 commuters travelled between Malta and Gozo during the second quarter this year, an increase of 6.6% when compared to the corresponding quarter in 2012. The highest number of commuters was recorded in June - 397,266 or 34.5% of the total for the quarter. The number of vehicles carried by scheduled vessels went up by seven%, totalling 293,446. The number of trips in the period under review stood at 4,792, an increase of 1.1% over the corresponding period last year. The majority of trips took place in June - 1,660 or 34.6% of total trips for the second quarter.

The company believes that the general state of the market in the next 6 months will become better. Nonetheless, Gozo Channel is not aware of the ESN and the ESN website, and further awareness efforts need to be done.

## **VIRTU FERRIES**

Virtu Ferries have been operating a high speed ferry service between Malta and Sicily since 1988. The *JEAN DE LA VALETTE*, 800 passengers, 156 vehicles including trailers, makes over 500 round trips every year between Valletta and Pozzallo (90 minute) and Catania (3 hours) effectively making Malta part of mainland Europe.

Venezia Lines, a wholly owned subsidiary of Virtu Ferries, has since 2001 run a six month seasonal service between Venice and eight Adriatic ports in Slovenia and Croatia. The high speed passenger ferries *SAN FRANGISK* and *SAN PAWL*, both with a capacity of 317 passengers, are deployed on this service. *SAN GWANN*, 427 passengers and 21 vehicles, operates between Bari, Italy and Durres in Albania.

All the companies vessels fly the Malta Flag, are classed by Det Norske Veritas and are certified to the highest international and EU safety standards.

### Fleet

San Marco  
Jean De La Vallette  
San Gwann  
San Pawl  
San Frangisk  
Maria Dolores



## DIRECT FEEDBACK

The total shortsea capacity (ro-ro) in ro-ro units of Virtu Ferries is 500 mtrs x 750 voyages annually. Virtu Ferries states that in the last 12 months, the general state of the market had no real change. They think that it will also not change in the next 6 months. For many Maltese, Sicily remains a shopping destination, but many also go to discover the enchanting landscape and nature that the nearby island has to offer, with several Maltese also buying properties there. With a crossing time of 90 minutes to Pozzallo and 3 hours to Catania, this daily, year-round, day return, service has eliminated the geographic divide between Malta and main land Europe, making Malta truly part of the European market. The proximity of Malta to Sicily, and with the catamaran leaving at convenient times, people can travel without interrupting work schedules. According to Virtu Ferries, the service carries in excess of 250,000 passengers and 25,000 private and commercial vehicles between Malta and Sicily annually. The schedule of just over 500 round trips per year allows for year-round day return excursions to Sicily from Malta and similar seasonal excursions to Malta from Sicily; these excursions have turned Malta and Sicily into two-point tourist destinations. Significantly the schedule also caters for niche commercial markets with a daily interchange of fresh agricultural and dairy products and fish between the two islands.

## MALTA MOTORWAYS OF THE SEA

Malta Motorways of the Sea Limited was incorporated on the 25th November 2005, a Limited Liability Company under the Malta Merchant Shipping Act.

Malta Motorways operates a fleet of 4 ships, namely Euroferry Malta, Eurocargo Europa, Eurocargo Africa, and Setubal Express. The types of cargo carried include trailers, reefer trailers, containers, cars, pallets, out-of-gauge cargo, hazardous cargo, boats, project cargo, and drydocking equipment.

### Passenger Routes

The passenger routes provided by GRIMALDI LINES group which includes also Malta Motorways of the Sea, offers regular departures to Barcelona, Tunis, Tangier, Malta, Patras, Igoumenitsa, Corfu, Porto Torres, and Palermo from Italy (Civitavecchia, Livorno, Salerno, Venice, Ancona, Brindisi).



NB: The above map includes also routes of Minoan Lines, another subsidiary of Grimaldi.

### Fleet

Euroferry Malta  
Eurocargo Europa  
Eurocargo Africa  
Setubal Express





The Group's programme of developing its Mediterranean short sea services is once again illustrated by the deployment, last March, of three new modern ro/ro vessels *Eurocargo Palermo*, *Eurocargo Roma* and *Eurocargo Sicilia*.

The *Eurocargo Palermo*, built at the Hyundai Mipo shipyards, has been deployed at the beginning of March in the short sea line linking Livorno to Savona, Barcelona and Valencia, together with the vessel *Eurocargo Ravenna*. The modern unit, with a length of 200 metres and a gross tonnage of 32,645 tonnes, is able to transport 3,847 linear metres of rolling cargo, at a service speed of 22 knots. This service, which has a three-times-a-week frequency, offers very convenient transit times for the traffic from the industrial basins of Milan, Turin and the north of Italy with Barcelona, the Catalunya region and the north of Spain.

Meanwhile, the *Eurocargo Roma* and *Eurocargo Sicilia* entered respectively into the Genoa-Livorno-Palermo and the Ravenna-Brindisi-Catania short sea routes. These two services offer customers of Northern Italy's industrial triangle an easy access to Sicily, as well as a fast connection between the Upper and the Southern Adriatic coast of Italy.

Furthermore, cargo from Switzerland, Germany, Austria and Eastern Europe can enjoy the advantages of these new lines. With the same features as her sistership *Eurocargo Palermo*, the *Eurocargo Roma* joined the *Eurocargo Brindisi* to provide four times a week the Genova-Livorno-Palermo MoS dedicated to the transport of rolling freight.

The *Eurocargo Sicilia*, built by the Odense shipyard, joined her sistership *Eurocargo Catania* on the three-times-a-week Ravenna-Brindisi-Catania service. Both have a cargo capacity of 250 commercial units, such as trucks, trailers, overgauge vehicles and other types of rolling cargo.

The deployment of these new Eurocargo-class vessels is aimed at strengthening and developing an efficient network of connections on the short sea routes, by providing the best service options to the Group's customers.

## DIRECT FEEDBACK

In the last 12 months, Malta Motorways of the Sea implemented further changes to improve their short sea services. The total short sea capacity (ro-ro) in ro-ro units is an average of 650 trailers/units per week on 4 voyages per week. The total short sea capacity (container) in TEU units is also an average of 650 trailers/units per week on 4 voyages per week. According to Malta Motorways of the Sea, the general state of the market in the last

12 months has improved. The shipping company Grimaldi Group strengthened its presence in the Adriatic Sea by launching a maritime connection dedicated to the transport of rolling units (cars, vans, trucks, semi-trailers, etc.) between the Italian ports of Ravenna, Brindisi and Catania in November. Through Brindisi and Catania, freight transporters will also be able to use, through transshipment, other regular services of the Grimaldi Group to Greece, the Balkans, Malta and Libya. In fact, the Neapolitan Group currently offers daily departures from Brindisi to Igoumenitsa and Patras while, from Catania, it performs four-times-a-week departures to Malta and weekly sailings to Libya (Tripoli, Al Khoms).

The company believes that the general state of the market in the next 6 months will have no real change. Furthermore, it states that it is aware of the ESN and the ESN website. It is in fact one of the founding members of the Malta Shortsea Promotion Centre (MSPC).

## **RELEVANT NEWS ITEMS**

### **Gozo Channel Co, Ltd. promotes a heart-safe environment**

Heart disease, in general, is the biggest killer in the modern world. It is a sobering thought that each year, in particular, sudden cardiac arrest (SCA) causes death of over 280,000 in the USA. In Europe, with 46 countries and with a population on the European continent of 730 million, the incidence of sudden cardiac arrest is estimated at approximately 1 per 1000 inhabitants per year, thus involving 700,000 people. Malta, surely and sadly, is not immune. These deaths may occur everywhere and anyone can be a victim of this silent killer. Many of these deaths are avoidable if the appropriate therapy and treatment is available within a few minutes (3-5 mins) of the onset of SCA. The placement of automated external defibrillators (AEDs) in the workplace can save lives and allow corporate entities to deliver a 'Heartsafe Environment' to workers and customers.

With the above concept in mind, Gozo Channel Co. Ltd has invested in the acquisition of five state-of-the-art Automated External Devices – the Powerheart G3 Plus from Cardiac Science. As explained by Gozo Channel Chairman, Mr Paul Curmi, 'Gozo Channel services thousands of passengers who make use of the ferry service between Malta and Gozo every day and night. With the incidence of Heart Related Deaths on the increase, we are to make in-roads into reducing this world-wide pandemic. Not only do we believe in safeguarding our customers and staff from ill fate caused by SCA, but we want to spearhead a strong culture of emergency response within the Maltese corporations.'

It's estimated that more than 95 percent of cardiac arrest victims die before reaching the hospital. A victim's chances of survival are reduced by 7 to 10 percent with every minute that passes without CPR (Cardiopulmonary Resuscitation) and defibrillation. 'That is why', continues Mr Curmi, 'selected members of Gozo Channel ferry crew have also undergone training in Basic Life Support and the use of AED. This certified training was provided by The Emergency Response Rescue Corps (ERRC).'

Few attempts at resuscitation succeed after 10 minutes. It is estimated that the median response interval (from call to ambulance arrival) is approximately 8-10 minutes (on land) – which means that by the time the emergency personnel arrive at a victim, the likelihood of survival from SCA will be extremely remote. This response time will of course be longer

when a victim collapses while travelling at sea – hence the investment by Gozo Channel of an AED on each ferry and one at each Terminal, in Mgarr and Cirkewwa.

Many world-wide studies have shown, without doubt, that early defibrillation saves valuable lives and by placing AEDs in corporations, workplaces and public places much sorrow and hardships could be spared. By making this life-saving investment, corporations can provide a Heartsafe environment that protects our most valuable assets – our people – from Sudden Cardiac Death.

Source: *Times of Malta*

Date: Wednesday, March 6, 2013

### **Joe Cordina heads Gozo Channel board**



The government has officially announced the composition of the new Gozo Channel Board, headed by former Labour Party financial secretary Joe Cordina.

Gozo minister Anton Refalo visited the company's offices, where he was greeted by the new board members Joe Cordina (chairman) Dr Christian Zammit (deputy chairman) Dr Renata Formosa (secretary) and Dr Kevin Mompalao, Charles Muscat Michael Attard, Josianne Cutajar George Said, Victor Borg and Liliana Curmi, members.

Source: *Times of Malta*

Date: Wednesday, April 24, 2013

### **Malta Motorways of the Sea renews agreement with Malta Chamber**

Malta Motorways of the Sea has renewed its Bronze Support Agreement with the Malta Chamber of Commerce, Enterprise and Industry. The new three-year agreement was signed by Dott. Emanuele Grimaldi, Chairman at Malta Motorways of the Sea and Mr David G. Curmi, President of the Malta Chamber.

"Malta Motorways of the Sea have supported the Malta Chamber since 2009. Prior to the merger, the company previously supported the Federation of Industry, and has renewed its commitment ever since," Mr Curmi said. The Malta Chamber President also praised Malta Motorways of the Sea Managing Director Ernest Sullivan and General Manager Joseph Bugeja for their active participation in Malta Chamber committees and activities.

Dott. Grimaldi declared that Malta Motorways of the Sea was proud to associate itself with the Malta Chamber. He said that the Malta Chamber's national mission and role to promote enterprise and growth to the benefit of all its members, the economy and nation were worthy of his company's special support. He also mentioned his company's wider role in the context of serving the local business community via modern vessels equipped with latest technology so as to ascertain the highest level of service and efficiency to the local business community.

Source: *MaltaIndependent*

Date: Tuesday, June 25, 2013

### 3. GREECE

#### OPERATORS

The EENMA founded in April 1940, initially as Shipowners Association Mediterranean steamers ships. Registration fee in EENMA, have ships that belong to Greek shipowners, irrespective of flag.

Its members now numbering 150 ships and the main types are Bulk carriers, Cargo ships, Tankers, Refrigerators, Ro-Ro, Container ships

List of EENMA (Hellenic Shortsea Shipowners Association) Members (Shipping Operators)

<b>COMPANY</b>	<b>e-mail</b>
A.C.A. Shipping Corp	<a href="mailto:chart@acashipping.com">chart@acashipping.com</a>
Aegean Ship Iii N.E.	<a href="mailto:aegean@aegeanoil.gr">aegean@aegeanoil.gr</a>
Aegean Ship Viii N.E.	
Amari N.E.	<a href="mailto:adafnomili@avin.gr">adafnomili@avin.gr</a>
Artemision Maritime Co	<a href="mailto:operation@sirios.co">operation@sirios.co</a>
Astrea N.E.	<a href="mailto:central@assodivers.gr">central@assodivers.gr</a>
Coasters Maritime Inc	<a href="mailto:questar@otenet.gr">questar@otenet.gr</a>
Delta International Ship.Co	<a href="mailto:deltasa@otenet.gr">deltasa@otenet.gr</a>
Derris Finance Ltd	<a href="mailto:european@enitank.com">european@enitank.com</a>
Eko-Afroditi N.E.	<a href="mailto:k.arvanitis@eko.gr">k.arvanitis@eko.gr</a>
Eko-Artemis N.E.	
Eko-Athina N.E.	
Eko-Dimitra N.E.	
Eko-Ira N.E.	
Enea Management	<a href="mailto:enea@enea.gr">enea@enea.gr</a>
European Co-Operation S.A.	<a href="mailto:info@europeanco-operation.gr">info@europeanco-operation.gr</a>
Evia Petrol & Metaf. N.E.	<a href="mailto:eviapetrol@mylakiltd.gr">eviapetrol@mylakiltd.gr</a>
Evia Shipmanagement S.A.	
Firodi N.E.	<a href="mailto:firodi@otenet.gr">firodi@otenet.gr</a>
Fres N.E.	<a href="mailto:adafnomili@avin.gr">adafnomili@avin.gr</a>
Ganmar Tankers Co	<a href="mailto:ganmar@otenet.gr">ganmar@otenet.gr</a>
Hellenic Environmental Center	<a href="mailto:info@hec.gr">info@hec.gr</a>
Iraklis Ane	<a href="mailto:manosa@lafarge.gr">manosa@lafarge.gr</a>
Irina N.E.	<a href="mailto:lassiship@yahoo.gr">lassiship@yahoo.gr</a>
Jet Tank Ship.Co	<a href="mailto:jettank@jetoil.gr">jettank@jetoil.gr</a>
Kouros Maritime Ent. Inc	<a href="mailto:kourosmar@otenet.gr">kourosmar@otenet.gr</a>
Larus S.A.	<a href="mailto:larus@larus.gr">larus@larus.gr</a>
Lidra N.E.	<a href="mailto:european@enitank.com">european@enitank.com</a>
Lilas N.E.	<a href="mailto:operation@sirios.co">operation@sirios.co</a>
Load Line Marine S.A.	<a href="mailto:general@loadline.com">general@loadline.com</a>
Med Sea Tankers	<a href="mailto:shipping@medseatankers.gr">shipping@medseatankers.gr</a>
Medtankers Management	<a href="mailto:medtankers@ath.forthnet.gr">medtankers@ath.forthnet.gr</a>
New Line N.E.	<a href="mailto:newlinek@otenet.gr">newlinek@otenet.gr</a>
Nisos Evia N.E.	<a href="mailto:operation@sirios.co">operation@sirios.co</a>

Okarina Navigation N.E.	<a href="mailto:lassiship@yahoo.gr">lassiship@yahoo.gr</a>
Olympik Metaf. Ydatos N.E.	<a href="mailto:dil1@otenet.gr">dil1@otenet.gr</a>
Polrom Oil N.E.	<a href="mailto:info@polrom.gr">info@polrom.gr</a>
Pylos N.E.	<a href="mailto:v.tyrogalas@martechltd.com">v.tyrogalas@martechltd.com</a>
Queensway Navigation	<a href="mailto:info@queensnav.com">info@queensnav.com</a>
Sea Venus Marine Co Ltd	<a href="mailto:seavenus@otenet.gr">seavenus@otenet.gr</a>
Sekavin Iii N.E.	<a href="mailto:adafnomili@avin.gr">adafnomili@avin.gr</a>
Silver Maritime Inc	<a href="mailto:silvermar@silvermar.com">silvermar@silvermar.com</a>
Sirios Ii N.E.	<a href="mailto:operation@sirios.co">operation@sirios.co</a>
Souda N.E.	<a href="mailto:adafnomili@avin.gr">adafnomili@avin.gr</a>
Stefanaus N.E.	<a href="mailto:dkotsifopoulos@veronaus.gr">dkotsifopoulos@veronaus.gr</a>
Thalassies Ellinikes Grammes N.E.	<a href="mailto:mgogis@hellenicsealines.gr">mgogis@hellenicsealines.gr</a>
Thalatta Ship. Manag. S.A.	<a href="mailto:gzafiroud@thalatta-ship.gr">gzafiroud@thalatta-ship.gr</a>
Unibros Shipping Corp.	<a href="mailto:mail@unibros.gr">mail@unibros.gr</a>
Universal Faith Ship. Co Ltd	<a href="mailto:center@assodivers.gr">center@assodivers.gr</a>
Vamvaship Maritime S.A.	<a href="mailto:vvamv@otenet.gr">vvamv@otenet.gr</a>
Vassilios Ship. Co	<a href="mailto:vsc@otenet.gr">vsc@otenet.gr</a>
Vistagi N.E.	
Zefyros N.E.	<a href="mailto:adafnomili@avin.gr">adafnomili@avin.gr</a>

List of Regular Lines:

<b>Company</b>	<b>From</b>
United Marine Agencies	Cyprus
Arkas	Port Said
Cargo Book	Cyprus
Salamis	Cyprus
Cosco	Adriatic
Neptune	France
United Marine Agencies	Italy
Allalouf	Italy
Msc	Italy
Arkas	France
Adamis	Barcelona
Neptune	Italy
Adamis	Spain
United Marine Agencies	Taranto
Allalouf	Salerno
Cosco	Adriatic
Zim Hellas	Albania
Cosco	Italy
Msc	N. Europe
Carel	N. Europe
United Marine Agencies	N. Europe
Adamis	Italy
Msc	Saudi Arabia

United Marine Agencies	Far East
Cosco	Far East
Msc	Turkey
Neptune	Turkey
Skandinavian	Istanbul
Skandinavian	Izmir
Cosco	Turkey
Zim Hellas	Black Sea
Arkas	Mersin
Neptune	Turkey
Neptune	Black Sea
Allalouf	Izmir
Msc	Romania
Msc	Turkey
Adamis	Turkey
Neptune	Turkey
Adamis	Mersin
Cosco	Turkey
Arkas	Istanbul
Allalouf	Izmir
Neptune	Black Sea
Salamis	Cyprus
Arkas	Port Said
United Marine	Cyprus
Msc	Egypt
Cargo Book	Cyprus
Msc	Spain
Cosco	Adriatic
Skandinavian	Italy
Msc	Italy
United Marine	Italy
Msc	Italy
Cosco	Spain
Adamis	Portugal
United Marine	Taranto
Cosco	Adriatic
Zim Hellas	Albania
United Marine	Far East
Zim Hellas	Far East
Cosco	Far East
Msc	N. Europe
Skandinavian	N. Europe
Zim Hellas	N. Europe
Carel	N. Europe

### List of principal Shipping Agencies:

COMPANY	Phone number	e-mail	website
Allalouf (Hellas) Ltd	+302104132011		<a href="http://www.allalouf.gr">www.allalouf.gr</a>
Arkas Hellas S.A.	+302104599460	<a href="mailto:arkas@arkas-hellas.gr">arkas@arkas-hellas.gr</a>	<a href="http://www.arkas-hellas.gr">www.arkas-hellas.gr</a>
Maersk Hellas S.A.	+302109473200	<a href="mailto:pirsaldirt@maersk.com">pirsaldirt@maersk.com</a>	<a href="http://www.maerskline.com">www.maerskline.com</a>
Mediterranean Ship.Co Greece Sa (Msc)	+302104145500	<a href="mailto:generic@mscgr.mscgva.ch">generic@mscgr.mscgva.ch</a>	
United Marine Agencies S.A.	+302104140600	<a href="mailto:bizexp@uma.gr">bizexp@uma.gr</a>	<a href="http://www.zim.com">www.zim.com</a>
Zim Hellas	+302104585800	<a href="mailto:arvanitis.nikos@gr.zim.com">arvanitis.nikos@gr.zim.com</a>	
Empros Lines	+302108125500	<a href="mailto:liner@emproslines.com">liner@emproslines.com</a>	
Cosco Hellas S.A.	+302104290810	<a href="mailto:alexandra@cosco.gr">alexandra@cosco.gr</a>	
Neptune Line	+302104557700	<a href="mailto:email@neptunelines.gr">email@neptunelines.gr</a>	<a href="http://www.neptunelines.com">www.neptunelines.com</a>
Medcargo	+302104179470	<a href="mailto:medcargo@otenet.gr">medcargo@otenet.gr</a>	<a href="http://www.medcargo.gr">www.medcargo.gr</a>
Skandinavian	+302104586300	<a href="mailto:info@sneal.gr">info@sneal.gr</a>	<a href="http://www.sneal.gr">www.sneal.gr</a>

### SERVICES / DEVELOPMENTS IN THE REGION

a. Ferry services to the Greek islands have further receded to the tune of -20% during the last 12 months. Smaller operators have been obliged to leave the market.

b. RoPax services in the Adriatic have also shown a dramatic decline in passengers as well as trucks despite cheaper fares. All operators have been making big losses.

c. The Greek flagged short sea cargo fleet has been declining in number of ships and capacity during the last decade down from 400 to about 200 vessels of all types.

d. There has been no newbuilding activity whatsoever.

e.Regulation 3577/92 on Cabotage has had serious restricting impacts on EU flags interpenetration. Many third flag vessels are now plying the Greek territorial waters on basis of dispensations.

f. The number of regular lines remains more or less stable after the demise of the last Greek regular lines eight years ago.

g. The main regular lines serving Greece in the container trade are MSC, COSCO and A.P.Moeller.

h. COSCO is keenly interested to assume the control of the management company of the port of Piraeus.

i. All portfolios of Greek ports have been transferred to a public fund seeking to privatize them.

## DIRECT FEEDBACK

THE CHAIRMAN OF THE HELLENIC SHORTSEA SHIPOWNERS ASSOCIATION  
*Mr Charalambos Simantonis*



IS INTERVIEWED BY  
*Professor Alkis John Corres of SPC Greece.*



**AJC:** Mr Chairman welcome and thank you for responding to our request for a brief interview on SSS.

Please tell us which are the 3 most important problems of the Greek shortsea shipping today?

**CS:** Thank you for your invitation, I'm very pleased to attend to your request. Greek sss is not different from EU SSS in the sense that it shares its fortunes. High average age of ships, difficulties in fleet renewal and lack of a dedicated trading area. Let me explain myself better. The high average age of ships is a consequence of lack of a dedicated trading area such as those existing in Australia, China, India, Russia and the United States. In all these regions sss is served by the country's flag. Regrettably, there is no such a thing in the EU, where ships from all flags have full access to intra-community transport. In business terms, this transpires as very small profit margins which inhibit ship replacement. Greek SSS has been shrinking as a result for years having lost approximately 200 vessels in the course of the last ten years, or less.

**AJC:** If high age and lack of dedicated trading area the two most important problems of the Greek sss, which is the 3<sup>rd</sup> problem?

**CS:** Greek sss does not presently have access to low cost home porting. Various attempts in the past to convince the ports of Piraeus and Thessaloniki to provide a friendly environment for sss vessels has let to no results. If these major ports promoted the idea of low costs charges for frequently calling ships, there would be benefit for both sides, shipowners and ports.

Since we are discussing the present situation, let me also add that the effects from the application of Regulation 3577/92 on cabotage have been rather poor. This regulation has achieved the exact opposite of its original intention, in the sense that it has blocked interpenetration of operators rather than making it easier. I am very surprised why it has taken the Commission such a long time to realize that.

**AJC:** I tend to agree with you Mr Chairman on regulation 3577/92, it was a pity that the EU Council of Ministers could not support the suggestions of Commissioner Borg on a single maritime space for the EU.

Are there any long term wishes from the side of the Greek sss?

**CS:** Yes, certainly. We would love to see the link of East Med to the fluvial system of the EU via Axios River connecting to the Danube. This would increase the importance of this port and would also give a tremendous boost to our sea-river operators. We would also like to see free access of EU SSS ships into the canal system of Russia and Ukraine. After discussing this matter for such a long time maybe it is time to move forward.

**AJC:** Last question Mr Chairman: Do you think the Greek SSS vessel is competitive?

**CS:** I regret to say that presently it is not. Think about it: High age, very expensive crew and strong competition from lower cost flags. How can one be competitive when everything runs against competitiveness? Greek SSS must be allowed to assume its former glory by the Greek government through a drastic simplification of the antiquated ship manning rules presently in force. If that does not happen, the future is doomed.

## RELEVANT NEWS ITEMS

### Piraeus to be European maritime capital in 2015

Piraeus is to be named Europe's maritime capital for 2015, European Maritime Affairs and Fisheries Commissioner Maria Damanaki revealed.

On July 1, in Belgium's capital, Brussels, the Council of European Union announced the cities that will host European Maritime Day (EMD) every year until 2019.



For the year 2015, EMD will be hosted in Greece, in the city of Piraeus, transferring in that way "two and a half thousand years of maritime history in the heart of the Eastern Mediterranean," as announced by the European Commission.

Damanaki met with PASOK leader and Deputy Prime Minister Evangelos Venizelos in Athens and informed him of the news.

With the opportunity of the decision's announcement, the Commissioner for Maritime Affairs and Fisheries, Maria Damanaki stated: "This is an important date for EU Maritime policy. The selection of hosting cities mirrors the diversity of Europe's maritime environment."

Venizelos said that Greece plans to make maritime affairs one of the key issues of its six-month EU presidency, which begins in January.

**Source:** [www.shippingherald.com](http://www.shippingherald.com)

### **Piraeus car loading station ready by Sep. 2013**

The Piraeus Port Authority announced that the car loading station at the Ikonio Car Terminal will be put in full operation in September 2013, following a relevant board decision. All the necessary works at the container and car terminals will be completed by the end of June 2013.

The Port Authority is already in talks with shipping and logistics firms in order for the car transportation system via rail to be operational by September 2013. The port will also be linked to Thriasio via railway by the same date.

Source: [www.shippingherald.com](http://www.shippingherald.com)

### **Piraeus port to become Mediterranean's No1 port**

A new investment of €224 million is being negotiated between the Hellenic government and Cosco Group, regarding the further expansion of Pier III of the container handling terminal of the Port of Piraeus, currently managed by the Chinese conglomerate. This was announced by Prime Minister Antonis Samaras, during his speech in the inauguration ceremony of the new Pier III



The new investment has been proposed by Cosco and isn't part of the original concession agreement signed back in late 2008. Should it be realized it will add 500 new jobs and enhance the port's handling capacity to reach almost 7 million TEUs annually, thus becoming the leading port in the Mediterranean Sea.

According to Samaras, Cosco has already invested €340 million, without yet exhausting the port's capacity. With the new investment planned, the total amount will increase to almost €600 million. From his part, Capt. Wei Jiafu, President of Cosco Group, who was also present in the inauguration ceremony, said that from the original 116,000 TEUs handled by the company during its first year of presence in the Port of Piraeus, it reached 2.1 million TEUs in 2012, while this year it is projected that a total of 2.5 million TEUs will be handled. The new Pier III, completed three years ahead of the original timeframe will result in a 5-year extension of Cosco's concession agreement (to a total of 35 years), as it was stated in the contract that should the investment be completed prior to 2016, an additional five year extension would be automatically set in place. With the commencing of operations (scheduled for the 1st of July) in Pier III, Cosco's subsidiary in Hellas, Piraeus Container Terminal SA (PCT) will be able to handle a total of 4.7 million TEUs per year.

### **Greece set for cruise traffic boost in 2013**

A total of 4.824 cruise ships carrying 5.475.816 passengers reached Greek cruise ports in 2012, data released by the Hellenic Ports Association. The Association's chairman, George Anomeritis said the numbers are very encouraging and that cruise ship traffic in Greece will rise in 2013. Infrastructure is being strengthened in 40 ports all over Greece, which is set to boost the cruise sector. Mr. Anomeritis also noted that Piraeus is at the top of

Mediterranean ports (along with Civitavecchia and Barcelona) in terms of transit passenger traffic.

Source: [www.shippingherald.com](http://www.shippingherald.com)

### **Greek and Italian Ports Achieve High Environmental Recognition**

On 20 February, ESPO awarded five new PERS certificates during a seminar held in Piraeus. ESPO congratulates the Greek ports of Corfu, Lagos, Kavala and Volos, and the Italian port of Piombino for this significant achievement.

The five small and medium size ports joined EcoPorts and achieved PERS certification as part of their participation to the EC co-funded SuPorts project, focusing on the sustainable management of European local ports. SuPorts is a European INTERREG IVC project which aims to assist local ports in the implementation of environmental strategies and to facilitate their access to suitable environmental management tools, enabling them to remain competitive by contributing to a more sustainable EU.

The port of Piombino is the first ever Italian port that achieves PERS certification. The four Greek ports join the already certified ports of Piraeus and Thessaloniki and raise the number of Greek ports holding a valid PERS certificate to six. Greek ports are clearly the champions of PERS, accounting for six out of the total of 16 certificates that were awarded in the course of the last two years.

The successful event in Piraeus was welcomed by the Greek Secretary General of Ports and Port Policy, Konstantinos Moutzouris and attracted various participants including local authorities, port professionals and academia.

Source: [www.espo.be](http://www.espo.be)

### **Salamis Lines' Ro/Ro service from Israel to call Piraeus**

A. Rosenfeld shipping Ltd, Salamis Lines' exclusive ship agent in Israel, informed that, Salamis Shipping S.A. Ro/Ro service, which serves the ports of Lavrio- Limassol–Haifa, resume its call at Piraeus.

Mr. Zary Rosenfeld, director general of A. Rosenfeld Shipping Ltd. said in a press release that the decision to return to Piraeus was made following numerous requests put forward by local clients who claimed that land transportation from Lavrio port to final destinations was expensive.

Rosenfeld added that the return to Piraeus enable the company to offer, for the benefit of Israeli market, a service for full containers, LCL cargo, motor vehicles as well as heavy machinery.

The vessels' schedule is Haifa- Limassol- Lavrio- Piraeus – Lavrio - Limassol–Haifa.

Source: [www.port2port.com](http://www.port2port.com)

## **Evergreen to reshuffle its East Med feeder network**

In order to provide better service in the Eastern Mediterranean area, Evergreen Line will adjust its Greece – Turkey Service (GTS), by adding the Turkish port of Gebze, and launch a new service called GCY.

The existing Greece-Turkey-Malta (GTM) service will be adapted to become the Greece – Cyprus service (GCY), with the following port rotation: Piraeus – Thessaloniki – Limassol - Piraeus

A company spokesperson stated: 'With this new feeder service from Piraeus to Thessaloniki and Cyprus and vice versa, Evergreen Line will satisfy market demands for improved transit times from Limassol to North Europe especially for reefer cargo".

Source: <http://www.allaboutshipping.co.uk>

## **HP and COSCO reach deal on Greek hub**

U.S. information technology giant Hewlett Packard has sealed a deal with Chinese shipping giant COSCO.

It agrees that HP can use COSCO's cargo terminal in the Greek port of Piraeus as a transit center to distribute its products.



According to the Greek Development Ministry, HP will move to Piraeus its central distribution hub for central Europe, the Middle East, North Africa, the Eastern Mediterranean and Eastern Europe.

HP senior Vice President says the deal initially provides for the transport of 20,000 HP containers annually.

The agreement coincides with the completion of a new 17-kilometre railway line connecting Piraeus with the main European freight network. Greek state rail operator Trainose can now forward a train to HP's key European hub in Prague in five days, said the company's chairman Thanassis Ziliaskopoulos

A day before the HP – COSCO deal, the government passed a law offering companies not based in Greece a VAT exemption to move their goods through the country. To be liable for the break, the imports must be worth at least 120 million Euros annually for the first five years, and 300 million Euros thereafter, while at least 90 percent of the goods must be earmarked for non-Greek markets.

Source: *News Shortsea*

Date: 15<sup>th</sup> March 2013

## **Greeks active in the newbuilding market**

The first week of March ended with strong presence of Greek owners in the newbuilding market. OceanBulk Maritime is said to have placed an order for two 180,000dwt vessels and Carras Hellas also another two similar vessels at Japan Marine United. In the

kamsarmax segment, Oceanbulk of Greece also confirmed ordering two kamsarmax vessels at Japan Marine United for delivery in 2014. In the tanker segment, European Navigation is said to be planning the ordering of a series of medium range tankers at STX Offshore & Shibuilding, with no concrete details. In the gas LPG segment, Brave Maritime is said to have signed a contract for the construction of two 7,200cbm pressurized LPG vessels at Japan's Kyokuyo Shipyard for delivery in the first half of 2014 at a newbuilding cost of \$22mil each.

In the second-hand market, Greek owners appeared to have bought one panamax dry bulk carrier built in 2005 and one handymax built in 2001 for about \$27,8mil, in the gas tanker segment, one small LPG with 5,018cum gas capacity built in 2006 for about \$15mil and in the container segment, two feedermax vessels of about 971TEU built in 1998 and in 1997 for about \$5,5mil.

Source: [www.shippingherald.com](http://www.shippingherald.com)

### **A generic ship for the short sea trades of the EU**

Alkis J. Corres, Union of Shipowners of Mediterranean Trading Vessels of Greece, Cooperation Committee for the Renewal of the Greek Short Sea Fleet (ESYAN), Harilaos N. Psaraftis, National Technical University of Athens

#### **ABSTRACT**

The Union of Mediterranean Trading Shipowners of Greece with the technical assistance of ICEPRONAV of Romania have developed a generic ship type that can be constructed in such ways to serve the needs of a wide spectrum of transportation requirements, while ensuring significant economies for the builder in series. The need for this exercise has arisen in the context of ESYAN where clustering of various ship types around the six thousand tons mark had to be taken advantage of in a way to generate scale economies for both, the owners and the builders. While no serious technical innovation is involved, this type of application is novel and offers measurable savings in identifiable areas of the construction. If the matter of the replacement of the Greek Short Sea Fleet is seen as part of the overall strategy of Greece in the post cabotage era of the EU, a large number of such vessels are expected to be built. This paper describes the rationale behind this project and discusses the opportunities and challenges to promote it.

## 4. CROATIA

Croatia has an increasing shortsea activity supported by a number of ship operators providing relevant links to the country's ports.

### PRINCIPAL OPERATORS AND THEIR FEEDBACK

#### **CMA CGM CROATIA D.O.O.**

Shipping agency representing Cma Cgm, France

Contact: *Jakov Karmelic, director*

#### COMMODITY TYPES

- The CMA CGM CROATIA D.O.O. is a shipping agency which represents the major container shipping company, so the agency accepts all commodities for overseas transport, always subject to the policy/restrictions valid at some port.



#### COUNTRIES OF INTEREST

- From the port of Rijeka the shipping agency accepts cargo to all principal ports.
- The company maintains a feeder service from Rijeka to Malta, and then from Malta to all major Mediterranean ports.



#### MARITIME LINKS OPERATED

- From Rijeka to Malta weekly feeder service.

- Vessels capacity nominal 1300 TEU, average speed is about 15 – 18 kn.
- Travel time/transit time from Rijeka to Malta depend on the rotation (vessel calling more ports in the region) and could vary from 2 to 4 days.

### LOGISTICS INITIATIVES AND TRENDS, BOTTLENECKS, BARRIERS AND HARMONIZATION OF PROCEDURES AND RULES

- For the moment there is limited gravitation area of the Rijeka port: Croatia, SW part of BiH and central/north part of Serbia,
- There are around 10 different shipping services out of Rijeka,
- Such status is good for the customers (exporters, importers) because they have more options, but such situation is not ideal for the shipping lines because of the limited volume of cargo,
- With the opening of the central european markets all lines and ports in the region will have Benefits with the much more cargo,
- Present obstacles are:
  - railway infrastructure
  - perception of the documentation / customs issues
  - few railway connections

### **JADROLINIJA**

Provides maritime transport of passengers and personal vehicles.

Contact: *Darko Mrnjavac, Head of Development and Documentation Service*



### COMMODITY TYPES

- JADROLINIJA is a shipping company which transports mainly passengers, their luggage, and their vehicles.
- Vehicles that are transported by the company's ships are not considered as cargo, there is not issued a bill of lading for vehicles, the vehicles are luggage of passengers.
- Trucks are not shipped, except in exceptional cases where the ship is empty and for economic reasons there is the need to fill the ships space.
- Passengers and their personal vehicles have a tariff advantage compared to commercial trucks.
- Occasionally there are instances of transportation of building equipment based on prior agreement and always with the passengers and their vehicles taking priority.

### COUNTRIES OF INTEREST

- Countries of interest and operations are specifically Croatia and Italy.



### MARITIME LINKS OPERATED

- From Dubrovnik to Bari in summer there are 2 voyages per week, and in winter the line does not operate. The vessels capacity is of about 1300 persons<sup>1</sup> and about 300 personal vehicles<sup>2</sup> (cars), average speed of ships is 18 kn. Average travel time per voyage is 6 hours. There are generally no delays in ports. The average tariff costs depend on season.
- From Split to Ancona in summer there are 5 voyages per week, and in winter there are 2 voyages per week. The vessels capacity is of about 1300 persons<sup>1</sup> and about 300 personal vehicles<sup>2</sup> (cars), average speed of ships is 18 kn. Average travel time per voyage is 6 hours. There are generally no delays in ports. The average tariff costs depend on season.
- From Zadar to Ancona in summer there are 5 voyages per week, and in winter there are 2 voyages per week. The vessels capacity is of about 1300 persons<sup>1</sup> and about 300 personal vehicles<sup>2</sup> (cars), average speed of ships is 18 kn. Average travel time per voyage is 6 hours. There are generally no delays in ports. The average tariff costs depend on season.



### LOGISTICS INITIATIVES AND TRENDS

- A fundamental change that is in progress is the adjustment to a newly built highway network which encourages switching to maritime transport to the road transport.
- The coastal line along the Adriatic sea (Rijeka – Dubrovnik - Rijeka) is being terminated because of the new highway.

### **AP MOLLER MAERSK – SAFMARINE CONTAINER LINES**

Container carrier with worldwide services. Moving containerized cargo around the globe focusing on the ocean, with knowledge to provide inland and logistics services.

Contact: *Ivić Vodopija, East Adriatic Manager*

<sup>1</sup> It depends which ship is operate; M/V Duborvnik – 1300 persons, M/V Marco Polo 1053 persons, M/V Zadar 1053 persons.

<sup>2</sup>It depends which ship is operate; M/V Duborvnik – 300 personal vehicles (cars), M/V Marco Polo 270 personal vehicles (cars), M/V Zadar 280 personal vehicles (cars).

## COMMODITY TYPES

- The AP MOLLER MAERSK – SAFMARINE CONTAINER LINES is a ship operator which accepts all commodities for the overseas transport, always subject to the policy/restrictions valid at some port.



## INFORMATION ON MARITIME LINKS OPERATED

- The agency operates a weekly line Trieste-Bar-Ploče-Split-Trieste.
- From Trieste to Bar there is 1 voyage per week. The vessels capacity is about 350 TEU, average speed of ships is 12 kn. Average travel time per voyage is about 32 hours. There are generally no delays in ports.
- From Bar to Ploče there is 1 voyage per week. The vessels capacity is about 350 TEU, average speed of ships is 12 kn. Average travel time per voyage is about 16 hours. There are generally no delays in ports.
- From Ploče to Split there is 1 voyage per week. The vessels capacity is about 350 TEU, average speed of ships is 12 kn. Average travel time per voyage is about 7 hours. There are generally no delays in ports.
- From Split to Trieste there is 1 voyage per week. The vessels capacity is about 350 TEU, average speed of ships is 12 kn. Average travel time per voyage is about 20 hours. There are generally no delays in ports.

## LOGISTICS INITIATIVES AND TRENDS

- Reducing costs and increasing efficiency as a continuous exercise.



## BOTTLENECKS, BARRIERS AND HARMONIZATION OF PROCEDURES AND RULES

- There are relatively frequent strikes of port workers in port of Trieste.
- There is relatively poor and outdated port machinery and equipment in the ports of Bar and Split.
- The relationship with the administration of ports works in a harmonious manner.

## OTHER SUPPORTING DATA

### **RO-RO services of Croatian ports**

<b>Ports</b>	Rijeka	Zadar	Šibenik	Split	Ploče	Dubrovnik
Bari						√ <sup>3</sup>
Ancona		√ <sup>2</sup>		√		
Rijeka				√ <sup>1</sup>		√ <sup>1</sup>
Zadar						
Šibenik						
Split	√ <sup>1</sup>					√ <sup>1</sup>
Ploče						
Dubrovnik	√ <sup>1</sup>			√ <sup>1</sup>		

1 - seasonal from 01.06. till 30.09.

2 - seasonal from 04.04. till 06.10.

3 - seasonal from 26.03. till 03.11.

### **RO-RO services of Croatian ports – number of sailings per week**

<b>Ports</b>	Rijeka	Split	Ploce	Zadar	Sibenik	Dubrovnik
Bari						3-6
Ancona		3-5		3-6		
Rijeka		2				2
Split	2					2
Ploce						
Zadar						
Sibenik						
Dubrovnik	2	2				

## RO-RO services of Croatian ports - number of trucks and trailers - both directions

Ports	Rijeka	Split	Ploče	Zadar	Sibenik	Dubrovnik
Bari						10.177 <sup>1</sup> 1.436 <sup>2</sup> 340 <sup>3</sup> 2.866 <sup>4</sup>
Ancona		10.871 <sup>1</sup> 776 <sup>2</sup> 4.070 <sup>3</sup> 2.657 <sup>4</sup>		10.912 <sup>1</sup> 142 <sup>2</sup> 2.554 <sup>3</sup> 2.693 <sup>4</sup>		
Rijeka		1.100 <sup>1</sup> 7 <sup>2</sup> 15 <sup>3</sup> 477 <sup>4</sup>				1.100 <sup>1</sup> 7 <sup>2</sup> 1 <sup>3</sup> 477 <sup>4</sup>
Split	1.100 <sup>1</sup> 7 <sup>2</sup> 15 <sup>3</sup> 477 <sup>4</sup>					1.100 <sup>1</sup> 7 <sup>2</sup> 1 <sup>3</sup> 477 <sup>4</sup>
Ploče						
Zadar						
Sibenik						
Dubrovnik	1.100 <sup>1</sup> 7 <sup>2</sup> 1 <sup>3</sup> 477 <sup>4</sup>	1.100 <sup>1</sup> 7 <sup>2</sup> 1 <sup>3</sup> 477 <sup>4</sup>				

1 – passenger cars

2 – buses

3 – trucks

4 – other vehicles

## Container services of Croatian Ports

PORTS	Rijeka	Zadar	Šibenik	Split	Ploče	Dubrovnik
Taranto	✓			✓	✓	
Gioia Tauro	✓				✓	
Ancona	✓			✓	✓	
Ravenna	✓			✓	✓	
Venice	✓			✓	✓	
Trieste	✓			✓	✓	
Koper	✓			✓	✓	
Bar	✓				✓	

- All mentioned lines are weekly feeder service.

## 5. CYPRUS

### OPERATORS

The main operators providing shipping links to Cyprus are described below. Some of them are principally deep sea operators who still provide shortsea coverage and / or short links with their main liner calls.

#### Shipping Lines calling at Limassol Port

#### Container ships:

**Liner agent: Blue Ice Navigation Co. Ltd**

Website: [www.blueice.com.cy](http://www.blueice.com.cy)



Blue Ice Navigation Co. Ltd is an independent Liner Shipping & Forwarding Company.

It has set up a global network of agents and partners and as a team, they provide the customer with a vast range of professional services including Liner Agency, Ships operations, Forwarding, Clearing, Warehousing, Distribution, Logistics projects.

#### Shipping Line: BISU LINE

Rotation: Piraeus – Limassol – Piraeus

Frequency: Weekly

**Liner agent: The Cyprus Shipping Co Ltd**

Website: [www.borlines.com](http://www.borlines.com)



Borchard Lines Ltd

#### Shipping Line: Borchard Lines Ltd



Line Name: North Europe (NE)

Rotation: London - Rotterdam - Antwerp to Piraeus -

Limassol - Ashdod - Haifa - Alexandria - Izmir - Salerno to London - Rotterdam - Antwerp.

Frequency: Weekly

Line Name: West Coast UK (WUK)

Rotation: Cardiff - Dublin - (Belfast) - Liverpool - Leixoes - Castellon - Salerno to Piraeus -

(Istanbul) - Limassol - (Izmir, Alexandria) - Haifa - Ashdod - Mersin - Salerno - Leixoes to Cardiff -

Dublin - (Belfast) - Liverpool - (Ports in brackets involve transhipment).

Frequency: Weekly





Line Name: West Mediterranean (WM)  
 Rotation: Barcelona - Marseilles - Genoa to Limassol - Ashdod - Haifa - Alexandria to Barcelona - Marseilles - Genoa  
 Frequency: Weekly

Line Name: Adriatic (ADR)  
 Rotation: Ravenna - Venice to Ashdod - Haifa - Limassol to Ravenna - Venice.  
 Frequency: Weekly



Liner agent: Maersk Cyprus Ltd  
 Website: [www.maerskline.com](http://www.maerskline.com)



**MAERSK  
LINE**

Maersk Line has had representation in Cyprus since the summer of 2001, with headquarters in Limassol, where their dedicated sales and customer service representatives offer the well-known global services of Maersk Line coupled with their local knowledge and expertise.

Maersk Cyprus achieves superior temperature controlled service through their Reefer Team at Limassol container terminal, with the collaboration of the Cyprus Agriculture.

Another advantage Maersk Cyprus has at its disposal is the power of the Internet. At their award winning website » [www.maerskline.com](http://www.maerskline.com) registered customers can track and book their cargo as well as maintain their own statistical database. 24-hour Live Help "Chat" is available to assist customers even after local working hours.

Shipping Line: MAERSK LINE

Rotation: Limassol – Alexandria - Ashdod – Salerno – Felixstowe - Rotterdam - Bremerhaven – Antwerp - Marsaxlokk - Haifa - Limassol  
 Frequency: Weekly service with 5 vessels

Rotation: Limassol - Port Said - Piraeus - Thessaloniki - Limassol  
 Frequency: Weekly service with 2 vessels

Shipping Line: CMA CGM

Line Name: FAS Levant East Med 2 Feeder

Rotation: Malta – Mersin – Beirut - Latakia – Limassol – Alexandria - Malta

Frequency: Every Week

Vessels: King Basil, Mediterranean Sea



**Liner agent: Feeder Network Shipping Agency Ltd**

Website: [www.feedernetwork.com.cy](http://www.feedernetwork.com.cy)

Shipping Line: MCL Feeder Services Ltd

Line Name: EGYPT LEVANT A - LOOP 2

Rotation: Port Said –East, Port Said –West, Damietta, Ashdod, Haifa, Limassol, Port Said - East

Frequency: Every 6 days

Vessel: MAIKE D



**Liner agent: Gulf Agency Co (Cyprus) Ltd**

Website: [shipping.cyprus@gac.com](mailto:shipping.cyprus@gac.com)



Delivering your strategy.

GAC Cyprus offers a wide range of shipping and logistics services throughout Cyprus's major ports and cities.

Shipping Line: Evergreen

Line Name: Greece Cyprus service - GCY

Rotation: Piraeus – Thessaloniki – Limassol – Piraeus

Frequency: Weekly



**Liner agent: Associated Agencies Ltd**

*Shipping Line: HAMBURG SUED*

Rotation: Felixstowe – Rotterdam – Bremerhaven- Antwerp – Haifa – Limassol – Alexandria – Ashdod- Felixstowe – Rotterdam – Bremerhaven

Frequency: Weekly

**Mediterranean Shipping Co (Cyprus) Ltd**

Website: [www.msccyprus.com](http://www.msccyprus.com)



MSC provides an unparalleled service network via dedicated own offices throughout the world and remains a truly independent and private Company able to respond quickly to market changes and implement long term plans, without unnecessary interference or delay. As of End-June 2013, MSC was operating 450 container vessels with an intake capacity of 2,290,000 TEUs.

Line Name: Adriatic – Piraeus – Limassol

Rotation: Venice – Ravenna – Ancona – Piraeus - Limassol

Frequency: Weekly

Vessels: MSC ANNAMARIA - MSC FLORIANA - MSC ADELE - MSC GIORGIA

Line Name: TIGER SERVICE TO LIMASSOL

Rotation: Qingdao - Busan - Shanghai - Ningbo - Hong Kong - Chiwan - Singapore - Jeddah - Beirut - Limassol

Frequency: Weekly

Vessels: MSC RAPALLO - MSC ALEXANDRA - MSC DANIELLA - MSC GENOVA - MSC LA SPEZIA - MSC DEILA - MSC FAUSTINA

Line Name: UK – NORTH WEST CONTINENT/LIMASSOL

Rotation: Bremerhaven – Hamburg - Le Havre - Felixton – Rotterdam – Antwerp – Barcelona-Valentia – Limassol

Frequency: Weekly

Vessels: MSC VERONIQUE - MSC LEANNE - MSC EMMA - MSC CLAUDIA - MSC MANU

Rotation: Thessaloniki – Volos – Piraeus – Limassol

Frequency: Weekly

Vessel: PARIS JR

**U.S.L. United Shipping Lines Ltd**

Website: [www.unitedshippinglines.com](http://www.unitedshippinglines.com)



UNITED SHIPPING LINES is a world-wide provider of high quality ocean transportation services with offices located in most major ports. USL is a legally bonded and FMC licensed NVOCC with a world-wide tariff for both import and export shipments to and from the United States. USL negotiates and maintains shipping contracts with VOCC's to provide reliable and competitive ocean services in most trade lanes throughout the world.

Rotation: Thessaloniki – Limassol – Thessaloniki

Frequency: Weekly

**Liner agent: Shoham (Cyprus) Ltd**

Website: [www.shoham.com.cy](http://www.shoham.com.cy)



SHOHAM (CYPRUS) LTD is one of the main liner and tramp shipping agents in Cyprus. With their vast experience in every aspect of ship agency and cargo handling activity they serve with dedication the import, export and transshipment trade of Cyprus.

Container terminal operations, stevedoring, customs clearing, freight forwarding, container haulage, container stuffing or unstuffing and warehousing are within the scope of their agency activities.

- Port agents in Limassol and Larnaca for all types of vessels: container, general cargo, bulk carriers, tankers, drilling platforms or cruise vessels.
- Port agents in Limassol and Larnaca for bulk carriers, project cargo, cruise vessels, tours and excursion organizers.
- Ship stores, spares and provisions, crew changes and repatriations.
- Heavy cargo haulage and Project Cargo handling.
- Global n.v.o.c.c. coverage, air freight, marine and air cargo consolidation.
- Chartering, marine insurance, cargo surveys.
- Travel agents.

Shipping Line: ZIM

Line Name: North Europe Service 2 (NE2)

Rotation: Felixtowe – Rotterdam – Bremerhaven – Antwerp – Haifa – Limassol – Alexandria – Ashdod – Salerno – Felixtowe

Frequency: Weekly

Vessels: Deve, Rosa, Lana, Pohorje, Derby D

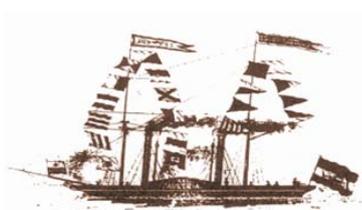
Line Name: Black Sea Express - BSX

Rotation: Haifa-Limassol Durres -Constanta-Varna-Istanbul-Izmit – Gemlik – Thessaloniki - Izmir-Piraeus-Limassol-Haifa

Frequency: Weekly

Vessels: Novorossiysk Star, Warnow Beluga, Odessa Star, Warnow Porpoise

**Liner Agent: AMHURST BROWN LTD**



Shipping Line: WALLENIUS WILHELMSSEN LINES

Rotation: China, Japan, Hongkong, Thailand, Korea & Singapore

Frequency: Weekly

Vessels: Feeders

**Liner Agent: MANTOVANI NAVIGATION LTD**

Website: [www.almantovani.com](http://www.almantovani.com)

Our services include:

- Port operations (including cruise vessels)
- Local marketing activity
- Booking of cargo imports and exports
- Documentation
- Container control
- Transshipment operations
- Crew changes
- Inland haulage
- Repairs
- Bunkering
- Ship-chandlers



**MANTOVANI NAVIGATION LTD**

In addition Mantovani Navigation has the capability to process and transmit electronically all shipping documentation (manifests, loading/discharging lists, bay plans, Bills of Lading etc) to any port required well in advance of a vessel's arrival with the latest technology available.

**Shipping Line: NIPPON YUSEN KAISHA**

Rotation: China, Japan, Hongkong, Singapore

Frequency: Weekly

Vessels: Feeders

**Shipping Line: MCCL**

Rotation: MEDITERRANEA

Frequency: MONTHLY

**Ro-Ro ships / Car Carriers:**

**Liner agent: M & A SHIPPING CO LTD**

**Shipping Line: GRIMALDI**

Line Name: Euro-Med Service

Rotation: Salerno, Savona, Setubal, Bristol, Cork, Esbjerg, Wallhamn, Antwerp, Southampton, Malta, Piraeus, Izmir, Ashdod, Limassol and Alexandria.

Frequency: weekly

Line Name: Adriatic Service

Rotation: Ravenna, Venice, Monfalcone and Koper , Piraeus, Ashdod, Haifa, Alexandria, Izmir, Gemlik, Lattakia, Tartous and Limassol.

Frequency: weekly service

## Liner agent: Hull Blyth Araouzos Ltd

Website: [www.hba.com.cy](http://www.hba.com.cy)

HULL BLYTH & CO LTD looks after the interests of many of the world's major shipping lines, offering a series of services:

- Container Lines: Far East
- Pure Car Carriers: Fast East and Europe
- RO/RO Line: Mediterranean
- Vessels owned or chartered by the UK Ministry of Defence
- Salvage and heavy Lift Carriers
- Grain Vessels' Charterers: Europe and Middle East
- Wine traders and Wine vessel owners
- Oil companies
- Cruise Lines



### Shipping Line: Höegh Autoliners

Line Name: East Asia to Europe

#### *Load ports:*

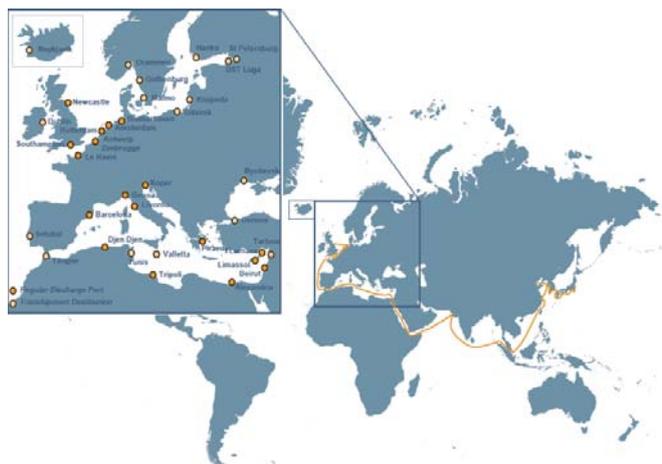
- Shanghai, China
- Incheon, South Korea
- Gunsan, South Korea
- Masan or Pusan, South Korea
- Kawasaki, Japan
- Kobe, Japan
- Kanda, Japan
- Hitachinaka, Japan
- Singapore

#### *Discharge ports, Mediterranean:*

- Alexandria, Egypt
- Beirut, Lebanon
- Mersin, Turkey
- Barcelona, Spain
- Djen-Djen, Algeria
- Genoa, Italy
- Livorno, Italy
- Koper, Slovenia
- Larnaca, Cyprus
- Limassol, Cyprus
- Piraeus, Greece
- Valletta, Malta

#### *Discharge Ports, North Continent:*

- Amsterdam, Netherlands
- Antwerp, Belgium
- Zeebrugge, Belgium
- Bremerhaven, Germany
- Le Havre, France
- United Kingdom:
  - Newcastle, UK
  - Southampton, UK
- Red Sea:
  - Jeddah, Saudi Arabia



**Liner agent: Nakufreight Ltd**

Website: <http://www.nakufreight.com.cy>

Since its incorporation in 1974, Nakufreight has grown into a chartering broker, tramp operator and liner agency organization with offices in Nicosia, Limassol and Larnaca, providing service, technical assistance and commercial advice to principals around the world.



Shipping Line: NEPTUNE LINE

Line Name: Line Name: Line 05

Rotation: Koper – Piraeus (Port for all shipments ex Spain, France, Italy, and Turkey) – Limassol – Tartous – Beirut – Alexandria – Piraeus

Frequency: Monthly

Ro-Ro ships carrying mainly General Cargo:

- **Liner agent: Salamis Shipping Services LTD**

Website: [www.salamisorganisation.com](http://www.salamisorganisation.com)

Services:

- Weekly Ro/ ro Liner service Greece- Cyprus- Israel and V.V
- C/S Salamis FILOXENIA using Limassol port as a home port
- Port Operations and Ships Agency Services
- Oil and Gas logistics
- Ocean Shipments / Forwarding / Removing Activities.
- Door to door delivery
- Air Freight
- T.I.R REEFERS AND Tilt trailer Service via Greece to from central- West Europe (CIR LTD)
- Weekly groupage Trailer Service from Milano Italy to Cyprus
- Cargo Logistics - Customs Clearing and Local Transport in Cyprus



Rotation: Haifa- Limassol- Lavrio- Limassol-Haifa.

Frequency: Weekly

Vessel: ALIOS

Note: Occasionally Salamis Lines is also calling the ports of Rhodes and Alexandria.

Expected to add a call at Piraeus.

## **DIRECT FEEDBACK**

Brief interview regarding the status of the short sea in Limassol port.

**Port Name :** Limassol Port

**Authority:** Cyprus Ports Authority (CPA)

**Name:** Panayiotis Agathocleous

**Position:** Administrative Officer

- 1. What percentage of the port's turnover constitutes SSS (including wet/dry/container cargo, cruises and RoPax services)?**  
16% (Ro-Ro Cargo and Transit Container)
- 2. Does your port offer any special treatment in way of discounts and/or dedicated quays to shortsea operators? If not, does CPA have planned to offer special treatment?**  
No, all services calling at Limassol port are served without any delays due to constant availability of berthing positions.
- 3. What has been the development of SSS the last two years in your port?**  
The same situation applies today as it was two years ago.
- 4. Which types of shortsea cargo do you expect to show the highest growth in the next five years?**  
Sea transportation of LNG from Vasiliko port to nearby countries.
- 5. Does the CPA maintain statistics for SSS?**  
Dedicated statistics for SSS are not maintained, but statistics for different types of services are available.
- 6. In 2020 the LNG Plant is expected to be operational and start LNG exports to Europe and other parts of the world. Have liner companies shown any interest in providing LNG liner services?**  
Not at the moment.
- 7. One of the aims of CPA is to increase Limassol port's role as a centre for passenger and cruise traffic. In this context CPA is constructing a new passenger terminal. Have cruise companies shown any interest in providing SSS services for passengers?**  
No, until today we did not receive any interest for the provision of SSS services for passengers or Ro-Pax from Limassol port. Currently we have only the local cruises during summer time (Limassol port to Greek islands mainly) and the large cruise ships that call Limassol port for few hours.

Brief interview regarding the status of the short sea in Larnaca port.

**Port Name :** Larnaca Port  
**Authority:** Cyprus Ports Authority (CPA)  
**Name:** Panayiotis Agathocleous  
**Position:** Administrative Officer

**1. Please briefly explain the main reasons that the SSS is not developed at your port.**

Larnaca is a small port without any major loading/unloading operations. It mainly serves the regional cargo and does not have any regular lines that carry TEUs or General Cargo.

**2. Do you think that with the completion of the redevelopment of Larnaca port and marina the SSS will develop?**

No, since this project mainly refers to the transformation of Larnaca port into the island's major cruise port. It also includes the rehabilitation of the port land, i.e. hotel, apartments, recreational facilities.

**3. What percentage of the port's turnover constitutes liner services (including wet/dry/container cargo, cruises and RoPax services)?**

No liner services, except from some Israeli passenger ships that call at the port twice a week during summer months.

**4. What percentage of the port's turnover constitutes feeder services (including wet/dry/container cargo, cruises and RoPax services)?**

No regular feeder services.

**5. In 2020 the LNG Plant is expected to be operational and start LNG exports to Europe and other parts of the world. Have liner companies shown any interest in providing LNG liner services?**

Not at the moment.

## RELEVANT NEWS ITEMS

### East Med Cruise now from Limassol

Let's Go Cruises by Amathus, released its new catalogue "Luxury Cruises 2013" and announces impressive itineraries for 2013 with the leading cruise companies in the world: NCL Cruises, Costa Cruises, Royal Caribbean Cruises, Celebrity Cruises, Pullmantur Cruises and TUI Cruises.

In the catalogue you will find cruises to the most popular destinations in the Mediterranean, the Baltic, the Adriatic Sea, Norwegian Fjords, the Caribbean, the Far East and Alaska at really affordable prices.

For the second consecutive year, Let's Go Cruises by Amathus gives the opportunity to experience the luxury with embarkation from Limassol on board the stunning Costa Mediterranea for a cruise in the Eastern Mediterranean. Travel to the beautiful islands of Greece, Rhodes, Santorini and Crete, Alanya, and Haifa and live unforgettable moments. Also with the Zenith of Pullmantur Cruises for the months of July and August from Piraeus to the Greek islands, Izmir and Istanbul and the popular route of the Western Mediterranean from Malta with the amazing Costa Favolosa. Impressive routes in the Adriatic with Costa Magica from Piraeus, the Mediterranean with Norwegian Epic from Barcelona or Rome and the Baltic Sea with Norwegian Star and more!

For more information please visit the following link:

[www.amathustravel.com](http://www.amathustravel.com)

### **Maersk Line, MSC and CMA CGM establish new liner alliance**



CMA CGM, Maersk Line and MSC Mediterranean Shipping Company SA have agreed to establish a long-term operational alliance on East – West trades, called the P3 Network. The aim is to improve and optimize operations and service offerings.

The P3 Network will operate initially 255 vessels on 29 loops on three trade lanes: Asia – Europe, Trans-Pacific and Trans-Atlantic.

The P3 Network vessels will be operated independently by a joint vessel operating center, the Partners will continue to have fully independent sales, customer service and marketing functions. Vessels committed to the P3 Network will continue to be owned / chartered and funded by the Partners.

The joint vessel operating center will operate an expected capacity of around 2.6 million TEU of which Maersk Line is expected to contribute with 1.1 million TEU. MSC and CMA CGM will contribute with approximately 35% and 23% of the capacity respectively.

The P3 Network is expected to provide customers with an improved service offering in terms of a better coverage, improved frequency and higher network stability. P3 will create value by allowing Partners to operate with larger vessels while improving utilization. This will lead to significant environmental benefits from reduced bunker consumption.

The lines intend to start operations in the 2nd quarter of 2014, but the starting date will be subject to obtaining the approval of relevant competition and other regulatory authorities.

Source: [www.msccgva.ch](http://www.msccgva.ch)

### **New rotation – MSC SYRIA**

Starting by the end of June, MSC will have following rotation: Venice – Ravenna – Ancona – Piraeus – Limassol – Alexandria- Beirut – Lattakia- Piraeus –Gioia Tauro – Venice so from/ to Lattakia there will be a direct call to/ from Italian ports, Piraeus, Limassol and Izmir

Source: [www.ms cgva.ch](http://www.ms cgva.ch)

### **MSC - Line D**



Starting by September, the Line D of MSC will start to call directly and on weekly basis the port of Thessaloniki, the routing will be as following: Venice - Ravenna - Ancona - Thessaloniki – Piraeus - Limassol - Alexandria (old port) - Beirut - Lattakia - Izmir - Piraeus - Gioia Tauro - Venice

Source: [www.ms csyria.com](http://www.ms csyria.com)

### **Evergreen Launches East Black Sea Service (EBS)**

Evergreen Line announced the launch of its new East Black Sea (EBS) service, aimed at improving the line's service coverage in the region, particularly to/from the port of Poti (Georgia).

Evergreen will operate this new weekly service jointly with United Feeder Services (UFS). The partners will operate two vessels, the 971teu BFP MELODY and the 1,155 teu MURAT K respectively. The service's port rotation is Piraeus, Istanbul, Poti, Novorossiysk and Piraeus.



Poti is a significant addition to Evergreen's global port network serving as it does the country of Georgia and the surrounding territories. Located between the Black Sea and the Caspian Sea, Georgia provides a natural corridor to the markets of neighbouring countries' thanks to its improved road and rail connections.

In addition, the EBS service will offer a second weekly Evergreen call at Novorossiysk; the other already provided by the line's BSF service, which also links the Russian port with Istanbul and Piraeus.

Source: [www.allaboutshipping.co.uk](http://www.allaboutshipping.co.uk)

## **Signing Ceremony for new, environmentally friendly, ships**

In the presence of his Excellency the Minister of Communications and Works Mr. Tasos Mitsopoulos, contracts were signed for 4 environmentally friendly ships, to be built for the Cypriot ship owning company FrontMarine, in one of the leading privately owned Chinese shipyards.



The 4 vessels with a DWT of 58,500 MT will be delivered to their new owners starting the middle of 2015. The revolutionary new hull design – without bulbous bow – assures that the vessels will have a substantial saving on fuel consumption. Also the emissions of CO<sup>2</sup> and other greenhouse and toxic gases will be much lower than the latest international standards.

The ships will each have 4 cranes with a lifting capacity of 35 tons and will be classed by Germanischer Lloyd (GL). As per the contract FrontMarine has the option to purchase another 4 vessels by the end of this year.

Source: [www.allaboutshipping.co.uk](http://www.allaboutshipping.co.uk)

## **OOCL joining ZIM's East Med/Black Sea Express Service (EMX)**



ZIM's leading East Med/Black Sea Express Service (EMX) is to be joined by OOCL starting September 2013.

EMX provides first-class service between China, Korea and Malaysia to the East Mediterranean and Black sea regions, offering a unique gateway to Russia and CIS countries, with an exclusive direct call to Novorossiysk at with the fastest transit time in the market, direct Odessa call and excellent port coverage.

EMX Rotation: Pusan - Ningbo - Shanghai - Shenzhen-Da Cha - Port Klang - Haifa – Istanbul (Ambarli) - Odessa - Novorossiysk -Istanbul (Ambarli) - Haifa - Nhava Sheva - Port Klang - Shenzhen-Da Cha – Pusan

ZIM's long-standing EMX service, upgraded last year to include additional exclusive calls at best-in-market transit times, proved to be very popular with customers. OOCL joining ZIM in this successful venture is an additional indication to the leading position of ZIM's services to the East Med and Black Sea.

OOCL will introduce two container vessels to the EMX and Zim will employ eight vessels.

Source: [www.zim.com](http://www.zim.com)

## **G6 Alliance cancel direct call at Ashdod**

The Asia Black Sea Express (ABX) service will be replaced by a service connection via Port Said as well as a new feeder service to the Black Sea. Members of the G6 Alliance have announced their decision to modify their network between the Far East and the Black Sea effective from week 36.

The last sailing for the Asia Black Sea Express (ABX) service will be "MOL Performance".

According to press release issued by the G6 Alliance all port coverage will be maintained by a new dedicated feeder service with a connection via Port Said that will be added to Loop 4 of the G6 Alliance.



The G6 Alliance's Mediterranean service, EUM, will also provide a connection to the newly deployed Black Sea feeder through the existing Port Said call. The rotation of the feeder service will be: Port Said > Ashdod > Istanbul > Constanza > Odessa > Istanbul > Ashdod > Port Said.

The G6 Alliance members are APL, Hapag-Lloyd, Hyundai Merchant Marine, Mitsui O.S.K. Lines, Nippon Yusen Kaisha and Orient Overseas Container Line.

Source: [www.port2port.com](http://www.port2port.com)

## **MSC upgrading Israel - Black Sea service**

Mediterranean Shipping Company S.A. (MSC) announced the upgrading of its Israel - Black Sea service.

According to the company's statement, the Black Sea service currently served by the TEU 1,384 sisters MSC Edith and MSC Adriana, on a 14-day round trip will add a weekly fixed day call at Constanta. The new port rotation will commence with "MSC Adriana" voyage 335.

The statement noted that the service is focused on Israel's fresh produce export to markets in the black sea in general and the Russian market in particular.

The upgraded port rotation will be: Ashdod – Haifa – Alexandria – Piraeus – Novorossiysk – Constanta – Gebze – Izmir. According to the company's statement, the upgraded service will offer shorter transit time; 8 days to Novorossiysk, 11 days to Constanta, 13 days to Constanta.

Source: [www.port2port.com](http://www.port2port.com)

## **Shortsea supply chain boost Davies Turner**

Davies Turner's overland services from North Africa, the southern Mediterranean, the Balkans, and Turkey, have benefitted from a growing trend by UK retailers to place more frequent and smaller orders with suppliers based closer to home.

Sales director John McCartney said: "Volumes on our inbound trailers services from Turkey are going through the roof." "Production costs may be slightly higher than in South Asia or the Far East, but shorter lead times and the ability to order higher or lower volumes in response to rapidly changing levels of demand is encouraging near-sourcing across a range of business sectors in addition to retail and bringing a significant boost to throughput, in particular on our trailer operations between Turkey and the UK."

Source: [www.shortsea.info](http://www.shortsea.info)

## **Greening Europe's seaports and freight terminals**



Sea and inland navigation ports and freight terminals are faced with growing energy costs and major political and societal pressure in terms of their environmental performance.

There are new and stricter air quality standards and regulations coming online, but for the most part today's ports and terminals do not need to be pushed into changing. They understand themselves that there is an economic gain to be had by turning 'green'.

The EU-funded project GREEN EFFORTS ('Green and effective operations at terminals and in ports') is analysing port and terminal processes in detail with a view to developing new solutions reducing energy consumption while promoting the use of cleaner energy at container, roll-on roll-off (ro-ro) and inland waterway terminals.

With goods transport responsible for about 30 percent of the global carbon emissions caused by humans, GREEN EFFORTS is considering the increased use of renewable energies, as well as efforts to get port and terminal personnel actively involved in saving energy. The project will also examine the possibility of using liquefied natural gas (LNG), as well as shore-based power for berthed ships to reduce particle emissions in ports.

By focusing on efficiency and sustainability, GREEN EFFORTS is helping ports and terminals to achieve their own visions for 'greener' operations. Additionally to better environmental performance the project will also help port operators provide their customers with more accurate carbon footprint calculations, a key demand within the transport and freight network.

GREEN EFFORTS is also active worldwide, capitalising on opportunities to share

valuable knowledge and practical experience while strengthening trade relations with key stakeholders in the international port community, from South Asian to Latin America and beyond.

This information allows clients to calculate and publish their own product-related carbon footprint data, with the aim of improving their competitiveness in an increasingly environmentally conscious marketplace.

Source: [cordis.europa.eu](https://cordis.europa.eu)

## 6. BULGARIA

### OPERATORS

#### **NAVIGATION MARITIME BULGARE – SHIP OWNER/SHIP OPERATOR**

Navigation Maritime Bulgare AD is a Bulgarian maritime shipping company. The company is specialised in the carriage of bulk, general and containerized cargo, ro-ro and ferry cargo, chemical and petrol products to various destinations throughout the world. Navigation Maritime Bulgare EAD has an ISO 9001:2000 Quality management systems certificate. At present the Navigation Maritime Bulgare AD owns 30 vessels with a total 860,117 DWT and average age of 13 years. The company operates two ferries with 12 900 DWT each. Navigation Maritime Bulgare is designated as a national shipping carrier.



Bulk Carriers - New vessels: On 11th April 2012, Navibulgar took delivery of the sixth 30700 DWT vessel - bulk carrier. Thus, Navibulgar now operates a fleet of 6 sister bulk carriers: Vitosha (2010), Strandja (2010), Osogovo (2011) Belasitsa (2011), Lyulin (2011) and Rodopi (2012). All of them are built to an ice class, meaning they have sufficient strength, engine power and equipment to operate in the northern ice conditions. They are also "Lakers" type, so they can operate in the Great Lakes.



The 6st new bulk carriers cost 227 mil.usd- the largest investment of Bulgarian shipping company.

## Ferryboats

The company Navigation Maritime Bulgare operates two ferries with 12 900 DWT each.



Two identical ferryboat vessels operated by NAVIBULGAR ("Geroite na Sevastopol" and "Geroite na Odesa") each with total carrying capacity of 108 waggons/900 cars/100 motor trucks up to 16m length operate the regular lines: (1)Varna - Batumi - Ilichevsk – Varna; (2) Ilichevsk - Batumi – Ilichevsk; (3) Ilichevsk/Kerch - Batumi - Ilichevsk/Kerch; (4) Derince - Ilichevsk - Batumi - Ilichevsk – Derince

The trade name of Navibulgar's ferry line forwarding branch is FERRYSPEED. It provides a "door to door" carriage of all types of cargo (railway rolling stock, trucks, and containers, passengers, deck cargo and cars) to and from Ukraine, Belarus, Kazakhstan, Uzbekistan, Georgia, Armenia, Azerbaijan, Iran, Afganistan, Turkey, Greece, Macedonia and Serbia, using railway, maritime and auto transport.

Ferrysped together with Company partners offer several transport schemes for cargo shipment from Europe to Transcaucasia and Central Asia.

Main advantage of Navibulgar's ferry service: Possibility of cargo transportation without trans-shipment guarantees ; Higher safety and speed of delivery in comparison with traditional shipments ; Flexible tariff policy, based on the progressive discount system ; Single payment for a multimodal transportation

## New Ferryboat "Varna"



New Bulgarian ferry is on the water and is ready for operation. Was extended, widened and significantly modernized. Now totally improved ship can carry 42 wagons on the upper deck and on the lower 25 trucks. New ferryboat "Varna" will offer luxury cabins for crews of the trucks. With the commissioning Bulgarian company "Varna Ferry" will fulfill its obligation as a native carrier Bulgarian-Russian agreement for ferry service between Port Varna and Port Kavkaz. The forthcoming inclusion of "Varna" ferry in line

Varna-Kavkaz will help to increase the cargo turnover at Port of Varna. Ferryboat "Varna" will do about 50 full courses (Varna - Kavkaz - Varna) annually. That means more than 4,000 wagons and more than 2,000 trucks, further processed by Varna Ferry Complex.

### **I H B SHIPPING CO EAD – SHIP OWNER/SHIP OPERATOR**

IHB Shipping has been established in 2007 with a primary focus on the provision of Ship Management, New Buildings and Design Consultancy/Supervision services to third parties. I H B Shipping Management efforts are geared towards achieving technical excellence in Ship Management. A highly qualified team of experts is always capable of giving effective technical solutions to vessel problems. The Ship Management arm provides technical and commercial services. The New Building Consultancy team provides design, supervision and commissioning services. I H B Shipping Co EAD is a part of Industrial Holding Bulgaria group of companies.



### **AHILLEOS MARITIME– SHIP OWNER /SHIP OPERATOR**

'Ahilleos Maritime-Varna' LLC. was established in Varna, Bulgaria in 1991. The main activities of the company in the early years were in the sphere of ship-brokerage and agency services. Later on it successfully developed chartering and management of vessels with deadweight cargo capacity in variety of 7.000 up to 16.800 mts all over the world.

For more than 20 years extensive experience in the deep waters of shipping industry 'Ahilleos Maritime- Varna' LLC, with numerous vessels for general and bulk cargoes under commercial and technical management, has implemented variety long-lasting contracts.

The company operates five vessels. All of the vessels operate mainly in the West Atlantic and Caribbean Sea with occasional calls to Europe and West Africa carrying various cargoes – sugar, rice, aluminium products, fertilizers and others.



The ship managers are in possession of complete knowledge in ships - full understanding of specific technical matters, awareness of the commercial factors involved in operating a ship, extensive knowledge of the maritime laws and adequate understanding of relevant accountancy procedures.

Given above all the vessels under management / operating control of the company are completely prepared for best performance, always in compliance with good practices in shipping industry.

### **VST VARNA – SHIP OWNER /SHIP OPERATOR**

Varna Shipping and Trading (VST Varna) is a private company founded in 1998. The Company's principal activities include ship brokerage, chartering, ISM management, and maritime consultancy. VST Varna is committed in providing a complete range of reliable shipping services and building long-term relationships with clients and partners.



Varna Shipping and Trading EAD has considerable expertise in ISM implementation and control as the company currently operates a small fleet under ISM management. The company is ready to provide new shipowners with quality ISM-management services, ensuring them

that they will be able to face at any time the perils of the sea.

Varna Shipping and Trading EAD has significant experience with carriage of dry-bulk and general cargoes such as iron ore, coal, soda, minerals, grain, fertilizers, steel products, etc.

Their commitment to keep abreast of current market trends allowsthem to offer valuable advice to the clients. They maintain excellent relationships with reputable ship

owners and charterers from all parts of the world and have direct contact with some of the major exporters and traders in the local region.

### **NTN GROUP -TRIMPEX UNION – SHIP OWNER / SHIP OPERATOR**

The first private shipping agency company in Varna -Trimpex Union - is established in 1990 year.

Right after political and economical reforms in Bulgaria the company moves to the private sector and starts creation of a private agency.They continuously strive and work on enlargement the company`s activities and its participation in the maritime business. TrimpeX Union is predisposed in positive way for novelties and in this respect continuously put their efforts to implement a new transport schemes and trends.

They worked out and created the first RO-RO line Varna - Novorossiysk and the sea line Varna - Batumi.

Together with BMF and tourist companies as well made an attempt to rehabilitate the Bulgarian international passenger fleet. Knowledge of problems, professional learning, gained experience, analytical method of approach - all together enable them to take decisions adequate to any situation. It becomes apparent especially today as skillfully leads and puts into practice full management of the entrusted to all NTN Group fleet.

The company uninterruptedly works for raising the qualification of the employees in the NTN Group.

They serve liner and tramp vessels /from/to any destination, carrying all kinds of cargoes, loading and discharging/ tankers passenger vessels vessels under repair managed by the NTN Group vessel



### **COSMOS SHIPPING – SHIP OWNER/ SHIP OPERATOR**

COSMOS SHIPPING Ltd. was established in 1993 as a sole proprietorship offering ship brokerage and agency services. It has been growing ever since then to become now one of the most reputable private Bulgarian shipping companies active in the sphere of ship management, operation and chartering, incorporating professionals in the shipping

business keen to prove their abilities and professional skills. Focus on modern technology and customer satisfaction is the major drive for the company development.

Moving on from pure shipbrokering the company started acting as a manager, time charterer and operator of coastal size vessels of 1000-5000 dwt trading mainly in the Black and Mediterranean Seas, West Africa, Continent, Baltic and Far East. Later on two own vessels of this size were purchased and successfully managed and operated.

Since 2003 the company started chartering in handy size bulkers in the range of 20,000-45,000 dwt trading on world wide basis. In the year 2007 Cosmos Shipping acquired two vessels of 25,000 dwt, providing full commercial management, crewing and technical management. Currently, the company is acting as a ship manager of handy bulk carriers and is focused on expanding its fleet in the dry bulk sector.



Agencies representing main international shipping lines:-

### **MAERSK BULGARIA**

Maersk Line is represented in Bulgaria by Maersk Bulgaria Ltd., established in 1998. There are two offices in Bulgaria - Sofia (head office) and Varna.

Maersk Bulgaria is connected online to the extensive Maersk Line network, allowing fast and smooth coordination with all Maersk offices. Instant processing of all cargo related data is enabled by the most up-to-date IT platforms used by the company offices all over the world.

Maersk Line in Bulgaria offers weekly sailings via Varna, Burgas and Thessaloniki, connecting Bulgaria to and from virtually any destination in the world via Port Said in Egypt.

They aim at providing superior service to all their customers on the fast growing Bulgarian market.



Maersk Line Bulgaria and Port of Burgas signing a contract for commercial partnership

## **MSC BULGARIA**

MSC Bulgaria Ltd. was established in 1996 as a part of the global agency network of MSC Geneva.

The head office of MSC Bulgaria Ltd is located in central part of Varna, close to the port, with branch offices in Burgas and Sofia.

The company is run by its highly professional staff ready to meet all customers requirements, both regarding transportation and container export and import documentation. The scope of services offered, covers the whole variety of transportation schemes, including 'door to door services', regardless of the geographical location of either loading or delivery points. MSC,s pricing policy follow the prevailing trends of the market. At the same time this policy is flexible enough to meet as much as possible users needs.

Due to its reliable service the Company currently occupies leading position on the Bulgarian market.

MSC Bulgaria Ltd. offers weekly sailings from and to Varna, Burgas and Thessaloniki.



## **UNIMASTERS LOGISTICS PLC**

Unimasters Logistics Plc is a public, non-quoted company, with major logistic capabilities that span many industries and sectors. As one of the fastest growing freight management and logistics companies in Central and Eastern Europe, Unimasters Logistics gives clients a leading edge through use of a range of end-to-end, transparent logistics solutions. Our competitive advantage is based on effective, tailor-made services and on our willingness and ability to innovate and change constantly. UML Group continuously seek new market segments, partners and customers, while retaining and further developing existing partnerships.

Unimasters Logistics is recognised today as a leading supplier of quality port and marine logistics; freight management; contract logistics; cargo sales and marketing services for airlines and shipping companies, and many other services. UML Port & Marine Logistics products and services are: Ship Agency (Total service solutions for Ship owners, Ship managers and Charterers); Project & Port Logistics & Forwarding; Ship Supply (Delivery of full range of consumables and spare parts); Technical Services (Safety inspection; Safety management; Marine refrigeration system inspection and repairs; Environmental services); Marine Products (Marine lubricants and chemicals; Refrigerants; Technical gases; Tools & equipment for maintenance and repairs)

Two joint companies of Unimasters Logistics Plc - CMA CGM Bulgaria and Seabridge Agencies are representing leading shipping groups.

Seabridge Agencies Ltd. is official Yang Ming Marine Transport Corporation ([www.yangming.com](http://www.yangming.com)) Agent in Bulgaria. Yang Ming Marine Transport Corporation is a worldwide leading container shipping line.

CMA CGM Bulgaria JSCo. is official CMA CGM representative in Bulgaria. CMA CGM is a worldwide leading container shipping group.



**BON MARINE HOLDING S.A**  
**Bon Marine Shipping Agency Terminal Operator Ltd**

Bon Marine Shipping Agency – A team of highly qualified and experienced professionals provides a full range of agency services to the vessels visiting Bulgarian ports. This is one of their core activities. The company has contract with one of the major liner carriers K" Line (Kawasaki Kisen Kaisha Ltd.)\_ to represent them exclusively on the territory of Bulgaria.



to represent them exclusively on the territory of Bulgaria.

<http://www.klineurope.com/>

Bon Marine Shipping Agency offers transport solutions with all types of equipment plus a first class service

backed by leading international container carriers.(Evergreen Maritime Corporation)

With their activities they facilitate the realization of clients' international deals, by offering:

competitive freight rates; excellent transit time; customer-friendly procedures; permanent cargo tracking; prompt issue of documentation.

Their head office is in Varna, branch offices in Sofia and Rousse and a liaison office in Bourgas. That way they are strategically positioned to manage the main import and export traffics via the ports of Varna, Bourgas, Rousse and Thessaloniki.

**STEORRA LLC**

Steorra LLC was appointed by ZIM Integrated Shipping Services Ltd as its Liner Agent for Bulgaria 10 years ago, i.e. 2002. The Company's Head Office is in Varna, Bulgaria.



Based up-on high quality of transport and logistics services, Steorra's team of young people devote their efforts on establishment and improvement of an appropriate container trade's market share for ZIM in Bulgaria. Steorra's market behaviour is marked by a "Customer-Friendly-ZIM-Approach".

The Agency strictly obeys the quality management procedures, implemented by the Principals, so in a way, it can be accepted that its activities correspond to the requirements of the highest standards achieved by ZIM.

Strategic aim of Steorra's Management and Staff is to develop its share in the Bulgarian Market of transport and logistics services into permanent territory of trust, loyalty and care, in which Clients are liberated and relieved from usual transport worries and headaches.

Steorra Llc provide all customary services of a Shipping Company's Agent within the territory of Bulgaria, including but not limited to:Port and/or inland agency work; Marketing and Sales for the Principals' services; Handling of all types of cargo entering or leaving Bulgaria by Sea, Land or inner waterways or by transshipment; Handling of vessels owned, chartered or otherwise operated by the Principals within the Bulgarian Black Sea Ports; Reporting and keeping computer services required by Principals.

To match the requirements of above high standard activities, Steorra qualifies for rendering a full logistics package of services to its valuable Clients. In fact they add value twice: on one hand to Principals' services and on the other hand, to Clients' product.

## **GLOBAL MARITIME SERVICES LTD**

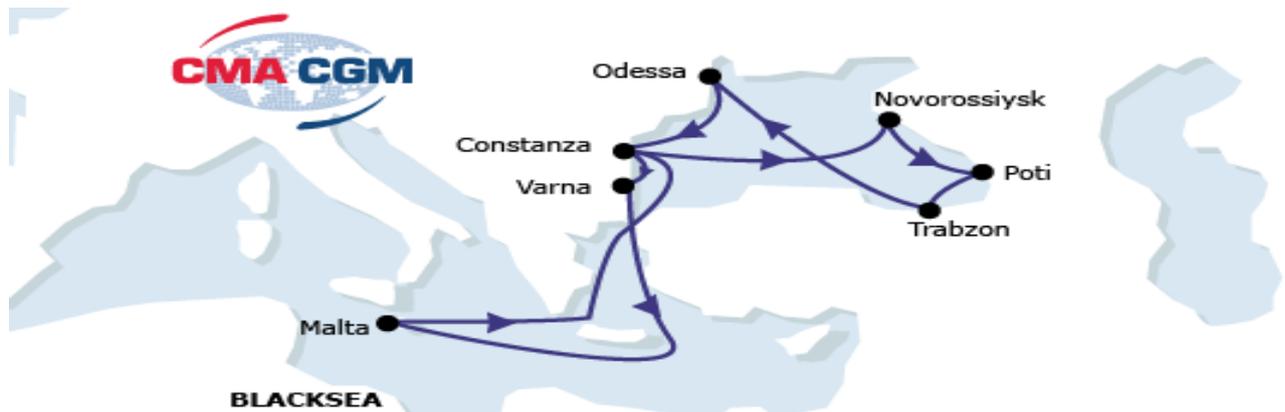


Global Maritime Services Ltd. was founded in 1998 and has been providing a full range of transport and logistics service to the Bulgarian and international markets for over many years now. The company's head office and the container depot are located in Varna – the main port city of Bulgaria. There is a branch office in the capital city of Sofia, which has been operational since 2001. Since its foundation the company is exclusive representative for Bulgaria of the global container line Hapag-Lloyd. They have been providing door-to-door container transport to and from worldwide locations at competitive freight rates and terms.

The company has a highly qualified team of skilled and experienced experts in the areas of forwarding, logistics, marine, automotive and intermodal transport, port and container yard activities. The expert team, combined with our facilities and equipment – containers, own warehouse and twenty-one trucks, etc. – has assigned Global Maritime Services as one of the leaders on the market for transport services in Bulgaria. Some of these services include: International door-to-door transport; Local and international auto-transport; Customs brokerage; Ship brokerage and port agency; Freight forwarding; Warehousing; Container depot.

## SHORTSEA SHIPPING /FEEDER SERVICES TO BULGARIAN SEA PORTS VARNA / BURGAS

1. Rotation: Istanbul-Burgas-Varna-Istanbul  
Ships: 1 Vessel  
Customers: MSC,NORAsia  
Frequency of Call: Weekly
2. Rotation: Istanbul-Burgas-Varna-Istanbul  
Ships: 1 Vessel  
Customers: MAERSK  
Frequency of Call: Weekly
3. Name: Black Sea Express  
Rotation: Haifa-Limassol-Constanta-Varna-Istanbul-Izmir-Gemlik  
Ships: 3 vessels  
Customers: ZIM  
Frequency of Call: 11 days
4. Name: Black Sea 1 Feeder  
Rotation: Malta-Varna-Constanta-Odessa-Novorossiysk-Poti-Trabzon-Odessa-Constanta-Varna-Malta  
Ships: 3 vessels  
Customers: CMA,UFS- Slots  
Frequency of Call: Weekly



5. Name: Cagliari-Black sea  
Rotation: Cagliari-Izmir-Istanbul,Odessa-Varna-Istanbul-Cagliari  
Ships: 2 vessels  
Customers:HL,ARKAS,YML  
Frequency of Call: 9 days



6.Name: Turkich Cobotage Service  
 Rotation: Istanbul-Gemlik-Varna-Istanbul  
 Ships: 1 vessel  
 Customers: HL.ARKAS,YML  
 Frequency of Call: 7 days



7.Name: Black Sea Express  
 Rotation:Piraeus-Novorossiysk-Constanta-Varna-Istanbul-Piraeus  
 Ships: 2 vessels  
 Customers: Evergreen,COSCO,K-Line,China Shipping,NYK.HL,ZIM,OOKL  
 Frequency of Call: Weekly



## 8. Name: Black Sea Service Seago Line.

The Black Sea service has been specifically designed for fast transportation of reefer cargo into the Black Sea area. It will offer direct weekly calls from Mersin and Ashdod to Novorossiysk, providing our customers with reliable weekly coverage between these ports. The rotation will be as follows: Ashdod-Mersin-Novorossiysk-Ashdod.

### *Short Sea Ferry/Ro-Ro Services*

Ferry Agreement Bulgaria-Ukraine-Georgia

Common multimodal transport company between Bulgaria-Ukraine-Georgia

### First Ferry Service: Navigation Maritime Bulgare Ferry Services

Two identical ferryboat vessels operated by NAVIBULGAR, each with total carrying capacity of 108 waggons/900 cars/100 motor trucks up to 16m length operate the regular lines: (1) Varna - Batumi - Ilichevsk – Varna; (2) Ilichevsk - Batumi – Ilichevsk; (3) Ilichevsk/Kerch - Batumi - Ilichevsk/Kerch; (4) Derince - Ilichevsk - Batumi - Ilichevsk – Derince. The trade name of Navibulgar's ferry line forwarding branch is FERRYSPEED. It provides a "door to door" carriage of all types of cargo (railway rolling stock, trucks, and containers, passengers, deck cargo and cars) to and from Ukraine, Belarus, Kazakhstan, Uzbekistan, Georgia, Armenia, Azerbaijan, Iran, Afganistan, Turkey, Greece, Macedonia and Serbia, using railway, maritime and auto transport. Ferrysped together with Company partners offer several transport schemes for cargo shipment from Europe to Transcaucasia and Central Asia. Main advantages of Navibulgar's ferry service:-

- Possibility of cargo transportation without trans-shipment guarantees ;
- Higher safety and speed of delivery in comparison with traditional shipments ;
- Flexible tariff policy, based on the progressive discount system ;
- Single payment for a multimodal transportation



## 7. OTHER

### RELEVANT NEWS ITEMS ON OTHER AREAS OF THE EAST MED / BLACK SEA REGION

#### **Israel issues tender for Haifa and Ashdod box terminals**

The Israel Ports Company (IPC) has issued the first stage of an international tender for two new container terminals in Haifa and Ashdod on a build-operate-transfer basis.

The tender, announced by the Israeli government, is aimed at global operators who will compete for a concession for Ashdod's Southport terminal and/or Haifa's Bayport terminals.



Built on reclaimed land, both terminals will feature container handling facilities to accommodate EEE class vessels, and when fully completed will boast quay walls measuring 1,600 metres and a depth of 17.3 metres.

The first stage of the tender will result in a list of eligible global operators, who will be selected on a number of factors including container terminal operational experience and financial strength. The operators will then be invited to participate in the second stage competitive bid process.

Concurrent with the operational tender, the IPC has completed the PQ stage for the tender for the construction of the new facilities and is issuing a request for proposal for the required works from the seven firms that have been deemed to meet the minimum criteria to participate in the request for proposal. The works covered include breakwater extensions and construction, dredging, reclamation and quay construction works.

Source: [www.shippingherald.com](http://www.shippingherald.com)

#### **New break bulk service from Antwerp to the East Med**

Currently the new line offers 1 departure a week with Antwerp as its main loading port and Alexandria (Egypt - 12 days transit time) and Mersin or Iskenderun (Turkey - 15-17 days transit time) as destinations. Possibly these destinations can be called at in reverse order depending on the cargo.

Apart from iron and steel products the service also takes general and project cargo on board. Although it isn't a heavy-lift service, there are nevertheless possibilities to take heavier objects. Europe East Med Shipping Line (EEL) of Malta is the operator of the chartered ships. In Antwerp it is represented by Belgian Cargo Services (BCS).

Source: <http://www.shortsea.be>

## **Seago Line - Black Sea service re-launch**



Seago Line confirmed the seasonal re-launch of its weekly Black Sea service. The focus of Black Sea service will be to service exporters and importers of perishable goods from southern Turkey, Israel and Egypt into the southern Russian market via the port of Novorossiysk. The service will restart in November 2013 and is expected to continue to run through to May or June 2014 depending upon market

demand.

The service will call at Mersin, Ashdod and one of the main ports in Egypt. The details of the exact port rotation and transit times will be announced at a later stage.

**Source:** [www.seagoline.com](http://www.seagoline.com)

## **2012 Black Sea region container market review**

Container terminals of Romania, Ukraine, Russia, Georgia and Bulgaria performed different results in 2012. While in previous years after the crisis these countries performed consistently high growth rates, in 2012 the situation has changed.

In 2012 total turnover of five countries of the Black Sea was 2,411,449 TEU, including empty containers, which is 2.11% higher than in 2011. For information, in 2011 overall growth, compared to 2010 was 23.99%.

For more detailed review of the situation we consider only loaded containers performance, excluding transshipment. A major factor of the growth slowdown was volumes reduce in Romania and Ukraine. Growth slowdown of Novorossiysk volumes was due to congestion of its container terminals. In 2012 Georgia became a leader by the container volumes growth, but the figure itself is two times lower than in the previous year. Thus, countries shares of laden container handling in 2012 redistributed as follows: Ukraine - 30.47%, Russia - 27.27%, Romania - 20.21%, Georgia - 14.96%, Bulgaria – 7.10%.

Black Sea region has traditionally been a region where import dominates exports, except Romania and Bulgaria, which have begun to change this trend back in 2011. In 2012, 64% of the total volume of laden containers was imports and 36% exports. In 2012, Russia and Ukraine increased volumes of laden containers with exports by 24.84% and 22.15%, respectively. In general, the laden/empty container distribution in the region is estimated to be 69% to 31% in 2012.

In 2012, top five container terminals were: DPW (Constanta), HPC Ukraine (Odessa), Poti, Novoroslesexport (Novorossiysk), CTI (Ilyichevsk). Comparing to 2011 terminals rating had changed – Poti container terminal overtaken Novorosles export and CTI, finishing third in 2012, while in 2011 it was ranked fifth.

As for liner operators at the Black Sea, in 2012 ZIM pressed CMA-CGM positions and showed the highest growth among global operators. In general, first four global operators control 66.97% of the Black Sea market, while in 2011 they controlled 67.09% of it.

In 2012, the year of the opening of G6 service, all its participants (APL, Hapag-Lloyd, Hyundai, MOL, NYK, OOCL) have significantly increased their volumes at the Black Sea.

Source: *Informall BG*

Date: 15<sup>th</sup> April 2013

### **APM Terminals to operate major Turkish port**

APM Terminals and Turkey-based Petkim have entered into a final agreement to create and operate Aegean Gateway Terminal (AGT). AGT will be one of Turkey's largest container and general cargo terminals and will be entirely operated by APM Terminals under a concession agreement with operations expected to start in summer 2015.



The agreement means that APM Terminals will assume full operational responsibility for the container terminal and general cargo operations in AGT.

The initial investment for the container terminal is approximately USD 400 million with further investments depending on market demand. APM Terminals will have the right to operate the port for a period of 28 years which may be extended further.

The CEO of APM Terminals, Kim Fejfer, explains that the independent port operator sees the deal as a winning combination of Petkim Port's location, its market access and natural deep water: "Turkey is a very important high growth market which we are pleased to enter together with strong and well respected business partners such as Petkim Petrokimya Holding A.S. and SOCAR. We look forward to establishing a long term presence in Turkey and apply APM Terminals' strong operational skills as well as our customer and safety focus into further developing the Izmir area into a key strategic logistics centre."

Petkim's port will offer 15.5 meter water depth and an efficient access to Turkey's high growth market. The initial capacity of the new container terminal will be 1.5 million TEU, which is 50% more than the capacity of the current city port of Izmir, Alsancak Port.

Source: [www.apmterminals.com/](http://www.apmterminals.com/)

Date: 22 February 2013

### **Rate restoration: North Europe/Greece, Turkey, Black Sea**

Seago Line announces a rate restoration effective October 1, 2013 in the trades between North Europe and Greece, Turkey (excl Mersin) and Black Sea. Traditionally rates in this trade have been stable but levels have significantly deteriorated in the past months and are no longer sustainable. We want to ensure that we are able to offer long-term, consistent and reliable services to you and your business. This can only be achieved by stabilizing rate levels to ensure sustainability in this market.

The details of the increases are:

#### Rate Increase Southbound

EUR 75/100 per 20'/40' container for rates in Euro

GBP 50/75 per 20'/40' container for rates in British Pounds

#### Rate Increase Northbound

EUR 50/75 per 20'/40' container for rates in Euro

Source: *SeagoLine*

Date: 28/08/2013

## 8. APPENDIX – OTHER SUPPORTING DATA

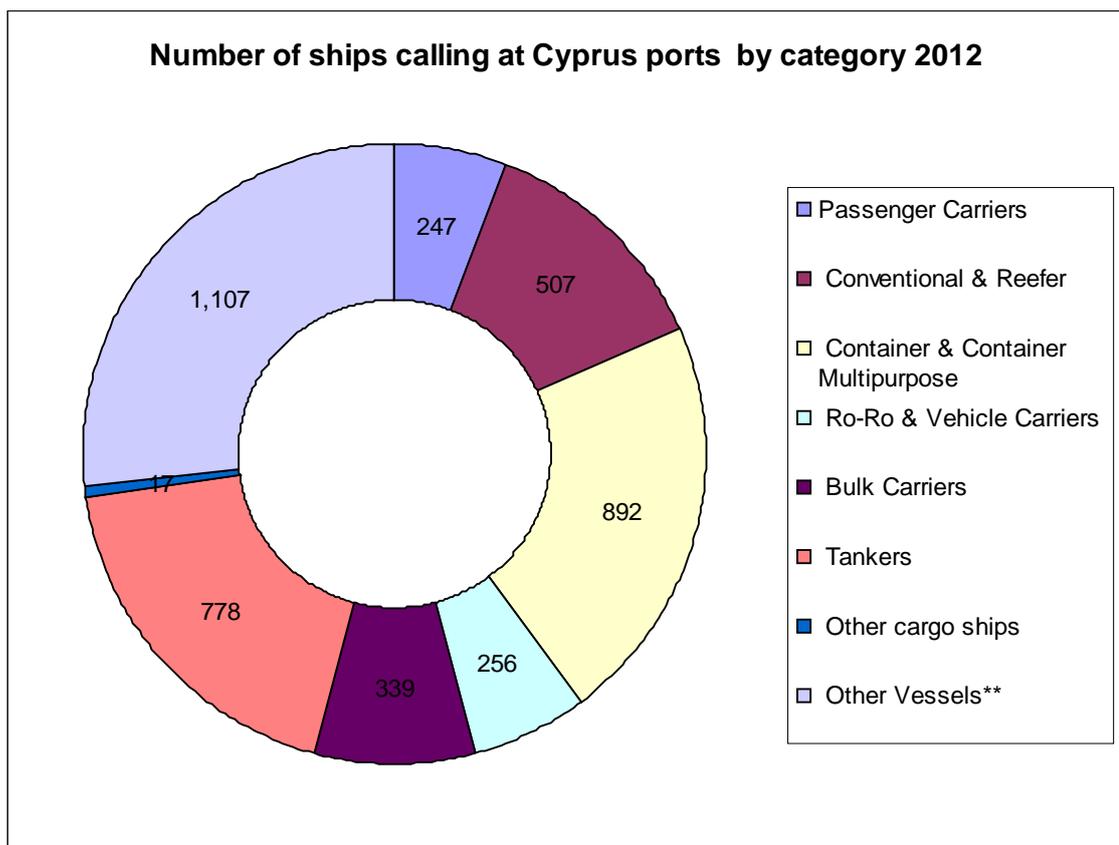
### CYPRUS

#### Shipping Activity - Cargo and Passenger Traffic

NUMBER OF SHIPS CALLING BY CATEGORY AND PORT- 2012					
	LIMASSOL	LARNACA	VASSILIKO	OIL TERMINALS*	TOTAL
<b>Passenger Carriers</b>	188	59	0	0	247
<b>Cargo ships:</b>					
-Conventional & Reefer	358	123	26	0	507
-Container & Container Multipurpose	890	2	0	0	892
-Ro-Ro & Vehicle Carriers	246	10	0	0	256
-Bulk Carriers	122	106	111	0	339
-Tankers	353	122	54	249	778
-Other cargo ships	13	3	1	0	17
<b>Subtotal Cargo Vessels</b>	1,982	366	192	249	2,789
-Other Vessels**	993	105	8	1	1,107
<b>TOTAL</b>	<b>3,163</b>	<b>530</b>	<b>200</b>	<b>250</b>	<b>4,143</b>

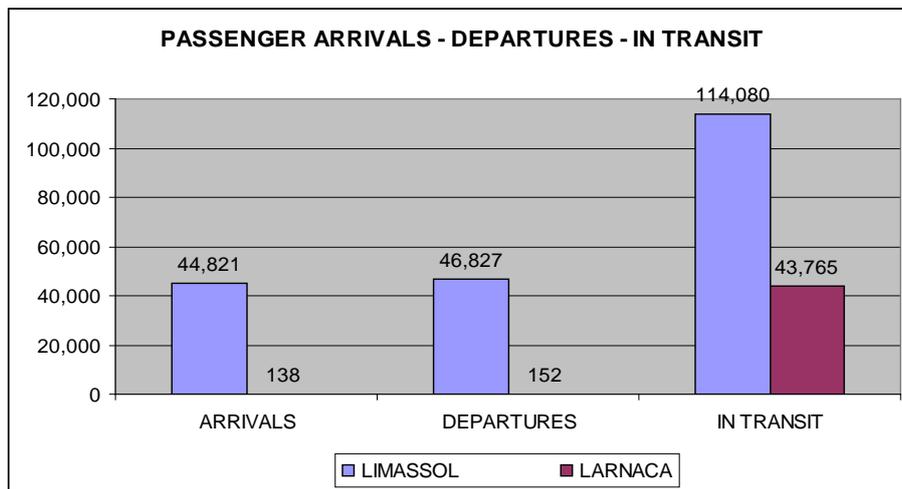
\* Oil Terminals: (Larnaka Oil terminal, Dekeleia, Moni, Akrotiri)

\*\*Other Vessels: Includes all other arrivals



## Passenger Arrivals – Departures –In Transit

	2012			
	ARRIVALS	DEPARTURES	IN TRANSIT	TOTAL
<b>LIMASSOL</b>	44,821	46,827	114,080	<b>205,728</b>
<b>LARNACA</b>	138	152	43,765	<b>44,055</b>
<b>TOTAL</b>	<b>44,959</b>	<b>46,979</b>	<b>157,845</b>	<b>249,783</b>



## CARGO HANDLED (In metric tonnes) (000s)

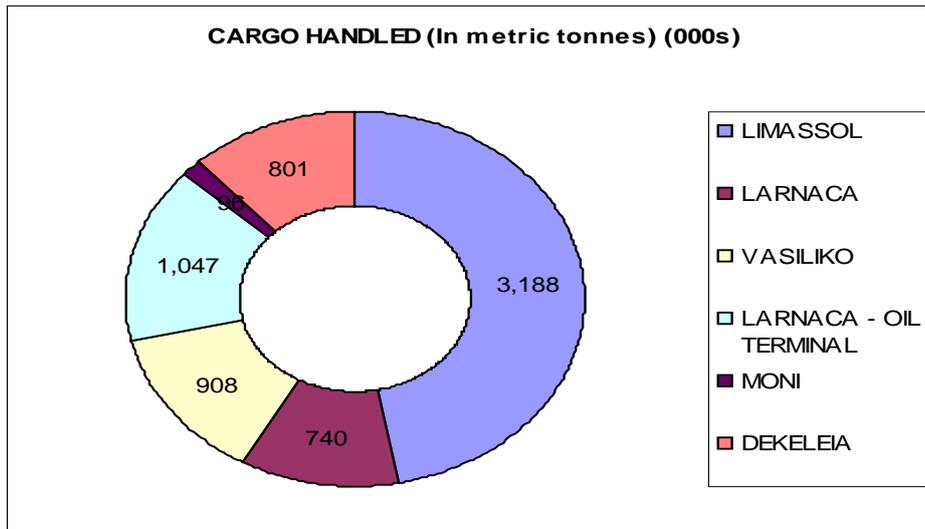
2012	IN				OUT				GRAND TOTAL
	CYPRUS	TRANSIT	COASTAL	TOTAL	CYPRUS	TRANSIT	COASTAL	TOTAL	
LIMASSOL	2,083	87	0	<b>2,170</b>	723	295	0	<b>1,018</b>	<b>3,188</b>
LARNACA	474	10	0	<b>484</b>	251	5	0	<b>256</b>	<b>740</b>
VASSILIKO	573	0	0	<b>573</b>	335	0	0	<b>335</b>	<b>908</b>
LARNACA*	1,047	0	0	<b>1,047</b>	0	0	0	<b>0</b>	<b>1,047</b>
MONI*	96	0	0	<b>96</b>	0	0	0	<b>0</b>	<b>96</b>
DEKELEIA*	801	0	0	<b>801</b>	0	0	0	<b>0</b>	<b>801</b>
<b>TOTAL</b>	<b>5,074</b>	<b>97</b>	<b>0</b>	<b>5,171</b>	<b>1,309</b>	<b>300</b>	<b>0</b>	<b>1,609</b>	<b>6,780</b>

\* Oil Terminals

**Note:** Manifested Imports of Petroleum Products to be used for Bunkers are not Included above

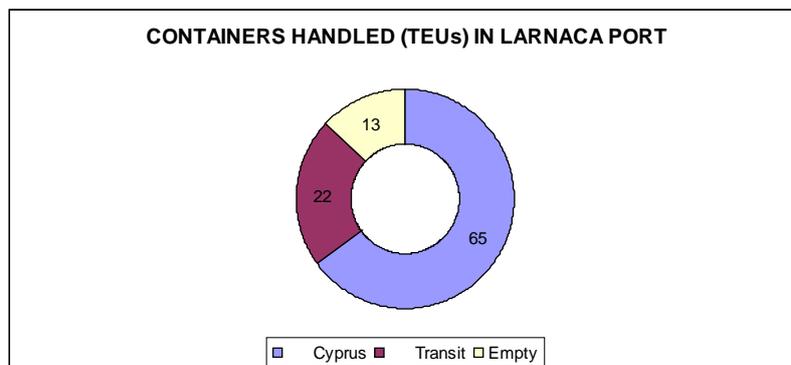
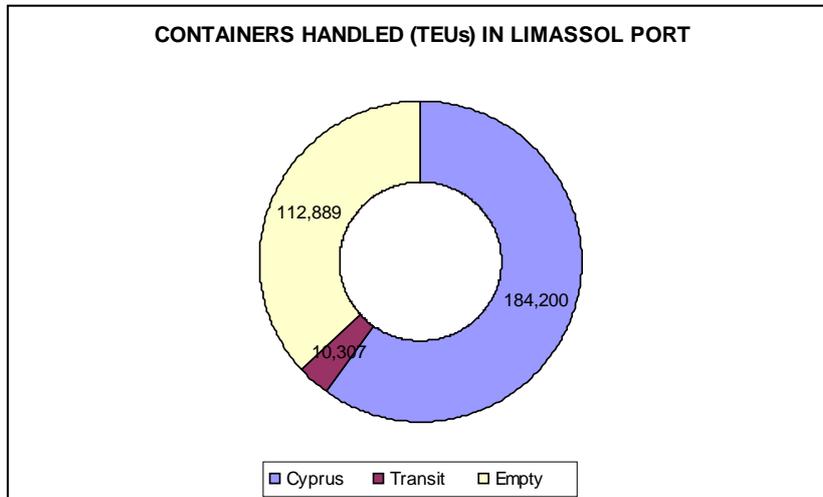
**Imports for Bunkers 2011 :** Lemesos 155.400 tonnes cy cargo & Larnaka 0

**Imports for Bunkers 2012 :** Lemesos 146.505 tonnes cy cargo & Larnaka 0



**CONTAINERS HANDLED IN LIMASSOL AND LARNACA PORTS (TEUs) - 2012**

	IN	OUT	TOTAL
Full			
Cyprus	142,192	42,073	<b>184,265</b>
Transit	5,199	5,130	<b>10,329</b>
<b>Sub-total</b>	<b>147,391</b>	<b>47,203</b>	<b>194,594</b>
Empty	5,954	106,948	<b>112,902</b>
<b>TOTAL</b>	<b>153,345</b>	<b>154,151</b>	<b>307,496</b>



## BULGARIA

### Ship owners /ship operators Bulk/Tanker/General Cargo ships

Number of vessels > 100 GT registered under country flag - Source UNCTAD

	Total	Oil Tankers	Bulk Carriers	General Cargo	Container Ships	Other
<b>Ships/Vessels</b>	92	11	14	20	0	47

Republic of Bulgaria in the period 2006-2012

Total cargo turnover through sea and river port

Years	2006	2007	2008	2009	2010	2011
<b>Sea ports</b>	27 762 401	25 426 146	27 132 353	22 271 801	23 431 263	25 656 586
<b>Inl.ports</b>	6 017 994	6 659 890	6 564 622	4 839 046	4 530 864	4 284 272
<b>Total</b>	33 780 395	32 086 036	33 696 975	27 110 847	27 962 127	29 940 858

Distribution of cargo turnover of sea ports in a way of transportation

Cargo	2006	2007	2008	2009	2010	2011
<b>Liquid</b>	11 825 695	11 492 705	11 721 337	10 397 819	10 140 622	10 506 992
<b>Bulk</b>	10 666 160	8 805 005	10 107 097	8 311 931	9 156 790	10 439 953
<b>General</b>	3 313 482	3 119 776	2 735 238	1 754 042	1 999 967	2 415 699
<b>Cont./t</b>	1 491 589	1 695 243	2 296 573	1 632 223	1 516 109	1 720 889
<b>Cont./Teu</b>	121 018	132 184	201 628	136 764	142 736	152 565
<b>RoRo/t</b>	444 664	380 876	272 163	175 788	146 753	119 182
<b>RoRo/unit</b>	16 498	14 442	12 194	6 658	9 607	6 530
<b>Total/t</b>	27 741 590	25 493 606	27 132 409	22 271 803	22 960 241	25 202 716
<b>Call</b>	6 902	8 227	8 711	7 706	7 912	8 702

Distribution of cargo turnover of inland ports

Years	2006	2007	2008	2009	2010	2011
<b>Liquid</b>	351 556	401 361	453 529	410 136	372 382	126 596
<b>Bulk</b>	2 632 695	3 032 738	2 622 636	2 240 747	2 303 682	1 970 068
<b>General</b>	999 567	994 576	901 341	416 021	419 734	607 558
<b>Total / int.</b>	3 983 818	4 428 675	4 037 660	3 066 904	3 095 798	2 704 222
<b>Total / cabt.</b>	2 034 176	2 231 215	2 526 962	1 772 142	1 435 066	1 580 057
<b>Total</b>	6 017 994	6 659 890	6 564 622	4 839 046	4 530 864	4 284 272
<b>RoRo/unit</b>	124 177	360 605	414 397	344 480	294 042	332 580

Source: MARAD

### BULGARIA Ship Operators /Containers results 2013

Table/Figure Containers Port of Varna / Port of Burgas January – July 2013

2013	Jan / Feb	March	April	May	June	July	Port of Burgas
<b>Total TEU</b>	<b>19 536</b>	<b>30 673</b>	<b>40 163</b>	<b>52 012</b>	<b>63 580</b>	<b>74 605</b>	<b>19 797</b>
MAERSK	4 467	6 474	9 041	11 031	12 863	15 003	7 615
MSC	3 650	5 169	8 068	10 749	12 612	14 678	12 182
UML	3 950	5 962	7 417	9 833	12 814	15 484	no
TER	2 468	4 140	5 581	7 275	8 856	10 057	no
GMS	1 807	2 760	3 428	4 346	5 235	5 824	no
STE	1 470	2 405	3 096	3 827	4 630	5 468	no

Source: BASBA.eu

## Short Sea Shipping Black Sea-Mediterranean

Form 2 000 to 10 000 dwt bulk/general cargo vessels trading Mediterranean – Black Sea region.

Table/Figure 1: Black Sea and Med Short Sea Fleet

	2009	2010	2011	2012		
Number of Vessels			2 522	2 358	2 235	2 176
Total DWT			12.31	11.45	11.00	10.84

Since 2009 the SSS Fleet has been consistently shrinking.  
Between 2009-2012 fleet diminished by 14 %. 350 vessels (147mln.dwt) removed.

Table/Figure 2: Mediterranean and Black sea Short Sea Fleet by age 2012

1-5 yrs	6-10 yrs	11-15 yrs	16-20 yrs	21-25 yrs	26-30 yrs	30 + yrs
348	205	194	196	222	376	632

Table/Figure 3: Mediterranean and Black Sea SSS Fleet by DWT2012

DWT	1-2 k dwt	2-4 dwt	4-6 k dwt	6-8 k dwt	9-10 k dwt	10-12k dwt
N	147	850	503	373	201	102

Table/Figure 4: European Short Sea /Coaster Order book (1.000 -12.000 dwt)  
Country (n 2011 / n 2012 )

Germany (110 / 38 ) ;	Netherlands ( 87 / 44 )
Russian Federation ( 34 / 11 ) ;	Turkey ( 17 / 7 ) ;
United Kingdom ( 9 / 3 ) ;	Denmark ( 8 / 4 ) Italy ( 8 / 0 ) ;
Estonia ( 8 / 4 ) ;	Ukraine ( 8 / 4 ) ; Norway ( 6 / 1 ) ; Ireland ( 6 / 6 ) ;
Greece ( 5 / 4 ) ;	Romania ( 3 / 0 ) ; Cyprus ( 2 / 0 ) ; Finland ( 1 / 0 ) ; France ( 1 / 0 ) ;
Number of SSS Fleet (new shipbuilding) from 300 unit down /2011 to about 130 unit /2012	

Table/Figure 5 Ali Aga Region/Turkey Scrapping

	2009	2010	2011	2012
Total DWT	213	307	845	669

Scrapping does on as a result of stricter environmental rules and weak market.  
Average scrapping age profile (around) 40 - 2010; 36 -2011; 35 -2012;

Source: ISTFIX