

30th March 2016

أهلا وسهلا



Luka Koper - Port of Koper

The Egyptian gate to/from Europe

Presented by Mr. Andrej Cah, Sales & Marketing Director

Our cooperation started...



Various fruit & vegetables...
Nile mandarins by vagon to
Germany in **1982**



... memories from some gatherings and workshops

Alexandria, 2001



Luka Koper 2004



Luka Koper 2005



Luka Koper 2009



Cairo 2015

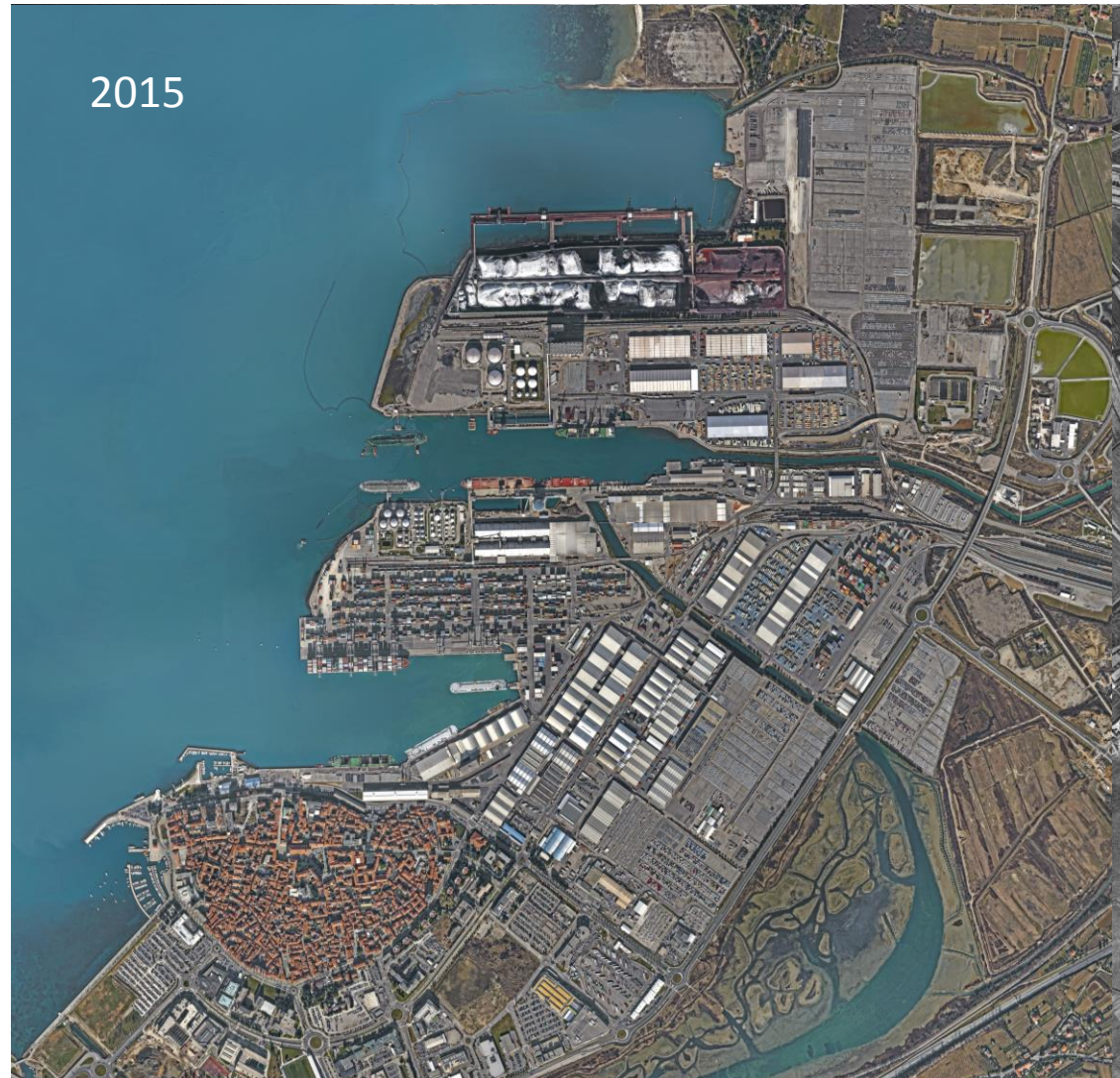
About the company Luka Koper, d.d.

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



BV - NON GMO certified
BV – EKO/BIO certified

Evolution through decades



Port of Koper – efficient combination of cost, time and energy savings

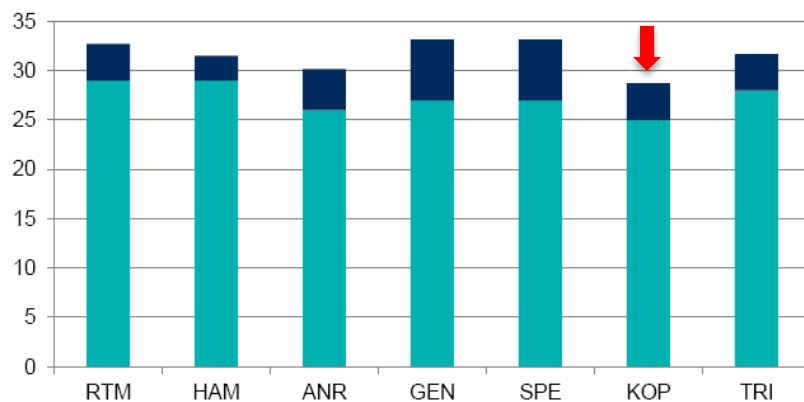


- more than 2.000 Nm shorter maritime route – up to 7 days shorter transit time by sea (if “slow steaming” at 12 knots)
- alternative route to Europe (impact of SECA Regulation effective on 1st January 2015 in Baltic Sea, North Sea and English Channel)

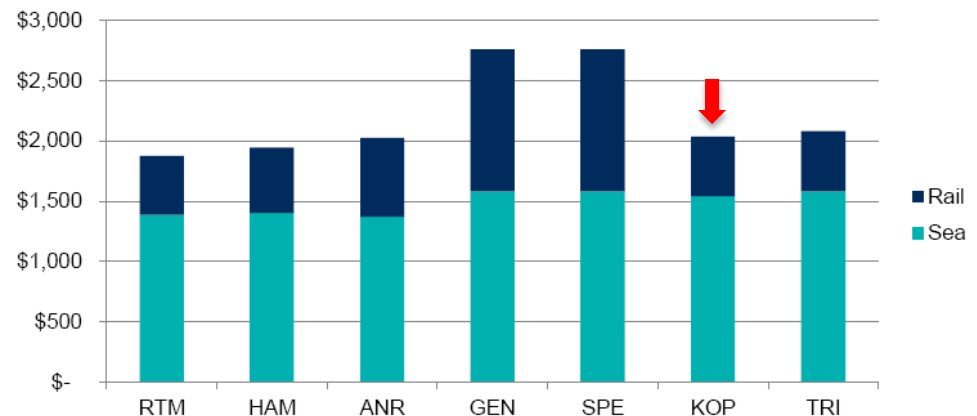
Drewry's Best route analysis

- in March 2016 Drewry published the **Best route market study for containerized transport to South Germany,**
- The study analyzed the transport of one 40-ft container from **Shanghai to Muenchen** through various ports (Rotterdam, Hamburg, Antwerp, Genova, La Spezia, Koper and Trieste),
- Koper resulted as the **best option for shippers with time-sensitive cargo.**

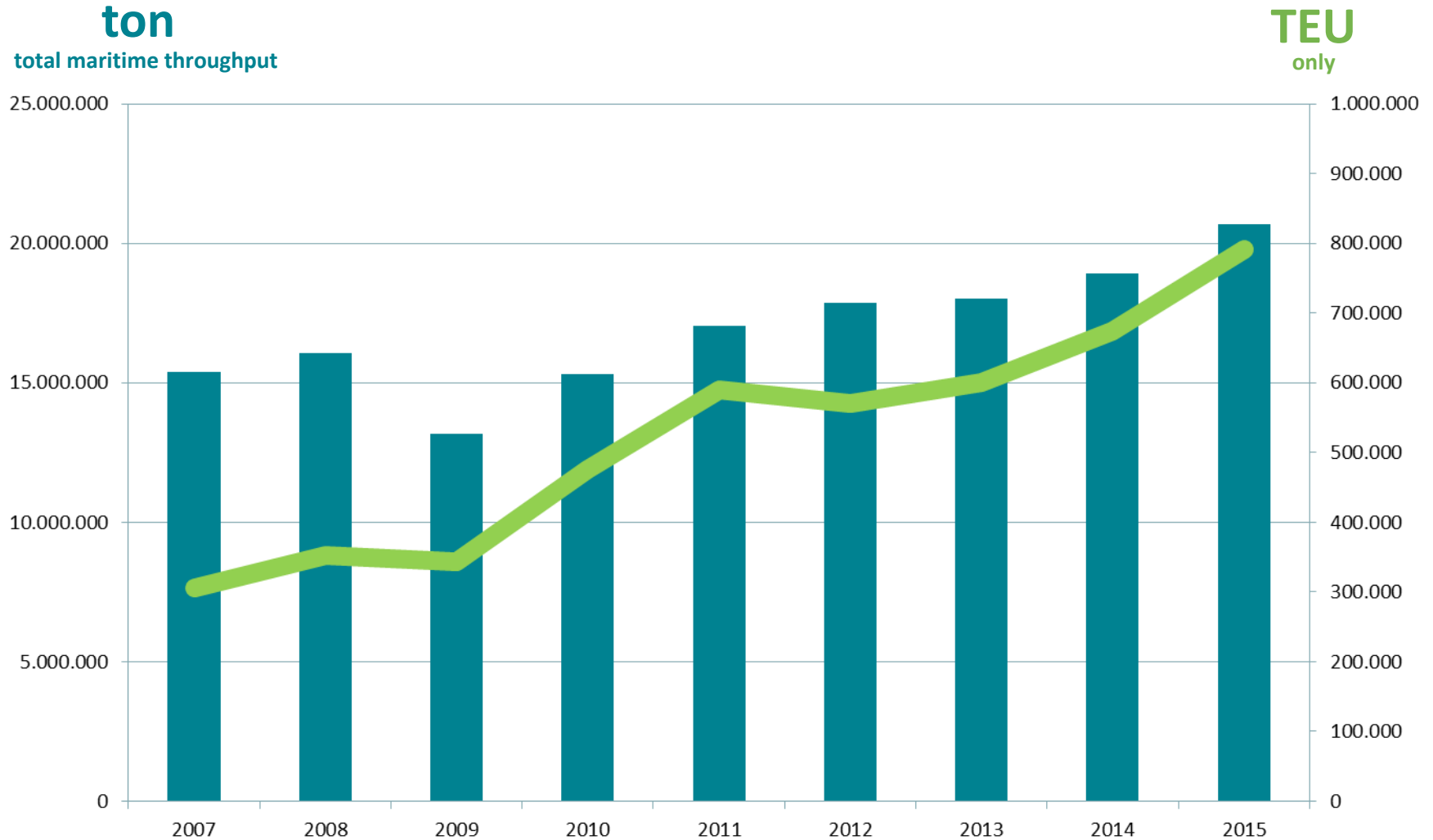
Transit time from Shanghai CY to Munich ramp (days)



Cost from Shanghai to Munich ramp (\$)



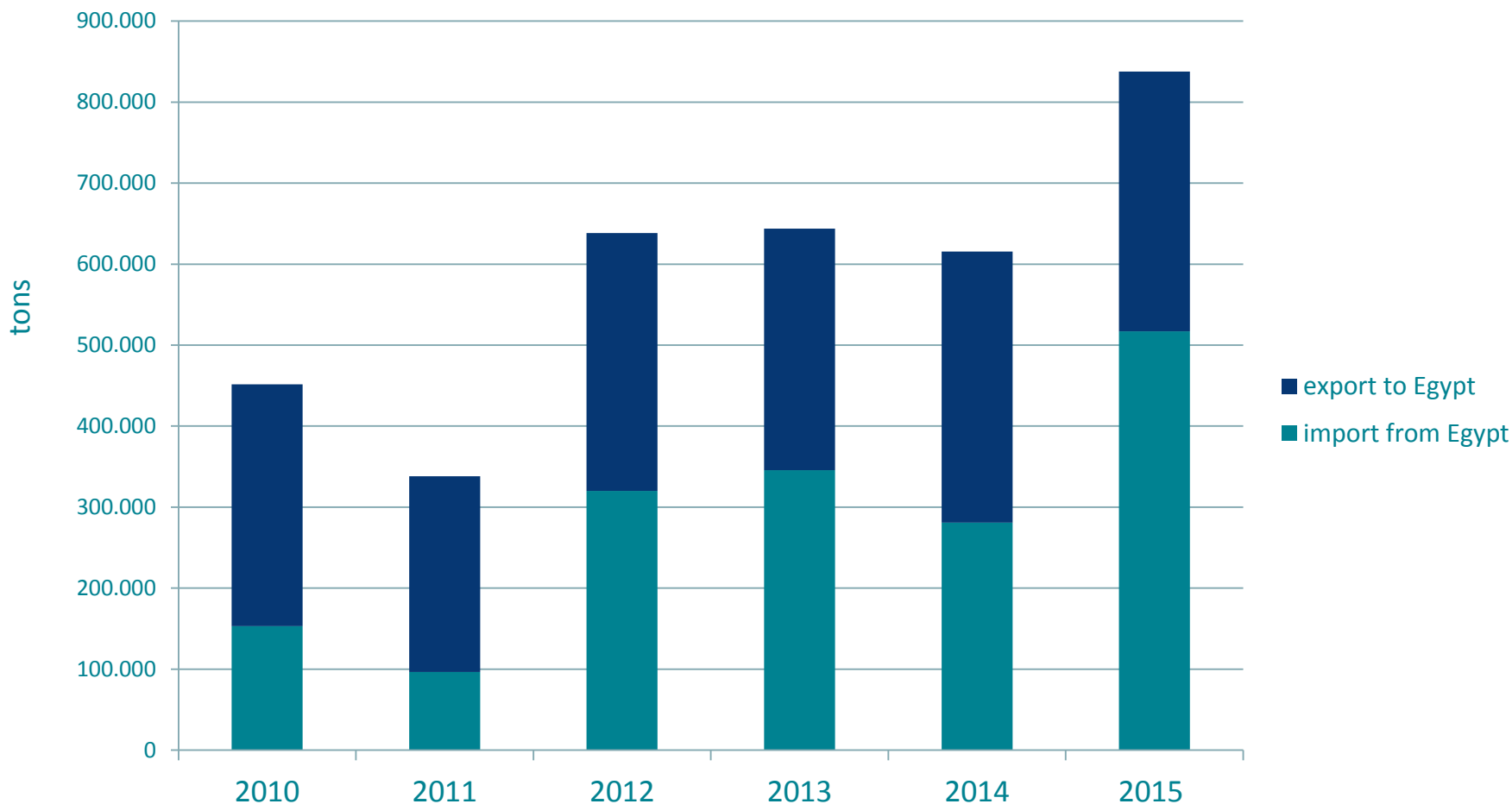
Maritime throughput



Egyptian cargo traffic via Koper

Export to Egypt: paper, cellulose, fire-safe bricks, electronics, plastic foil, apples,...

Import from Egypt: fruits and vegetables, salt, electronics, plastic, readymade garments,...

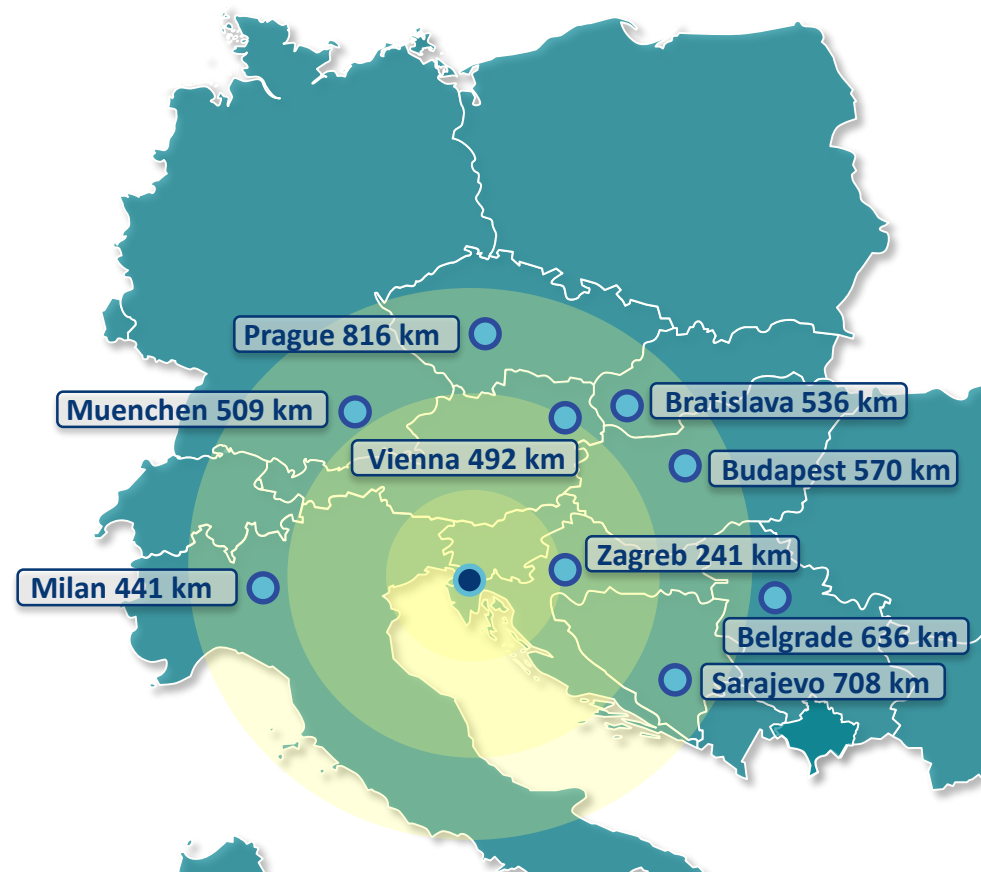
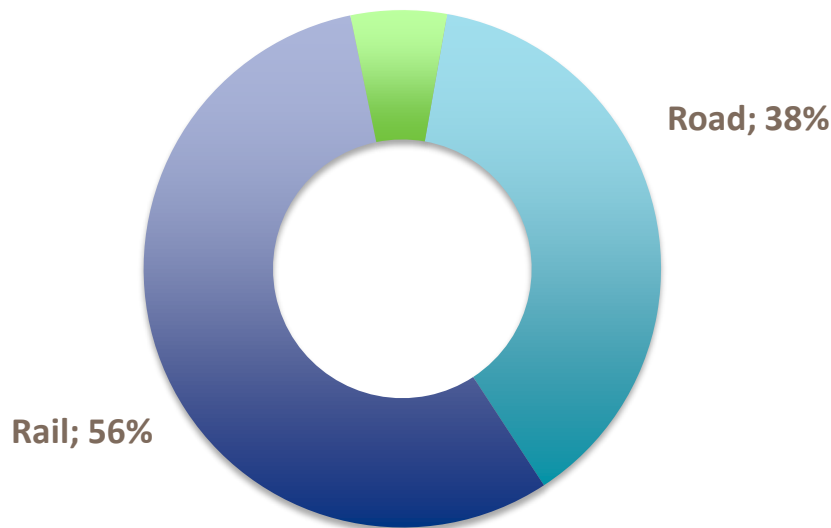


Hinterland rail & road connections

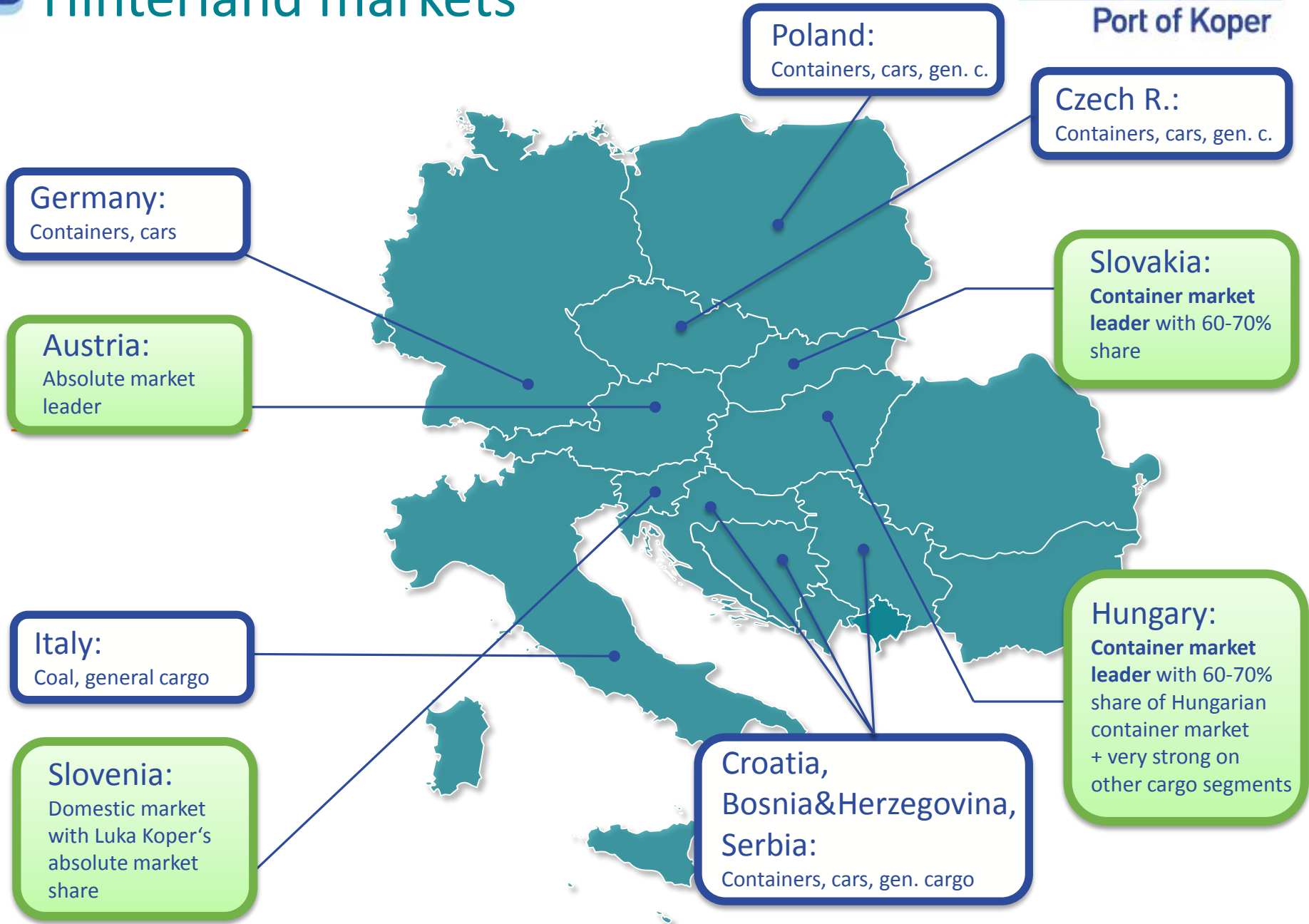
- excellent railway connections to hinterland markets,
- modern highway network,
- business centres of surrounding hinterland markets can be reached from the Port of Koper by **road in less than 1 day** and by train **in less than 2 days**.

Modal split

Transshipment; 6%



Hinterland markets



Poland:
Containers, cars, gen. c.

Czech R.:
Containers, cars, gen. c.

Germany:
Containers, cars

Austria:
Absolute market leader

Slovakia:
Container market leader with 60-70% share

Italy:
Coal, general cargo

Slovenia:
Domestic market with Luka Koper's absolute market share

Croatia, Bosnia&Herzegovina, Serbia:
Containers, cars, gen. cargo

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

Multi-purpose port

Containers



Break bulk



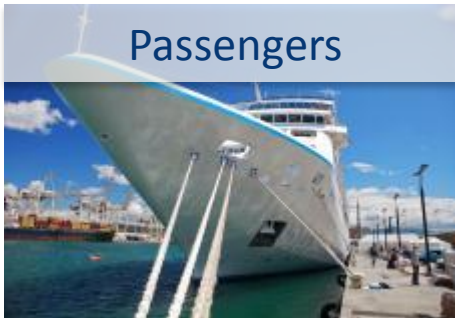
Liquid bulk



Project cargoes



Passengers



Reefer cargo



Cars & Ro-Ro



Alumina and other minerals



Coal and iron ore



Cereals and fodder



Timber



Livestock



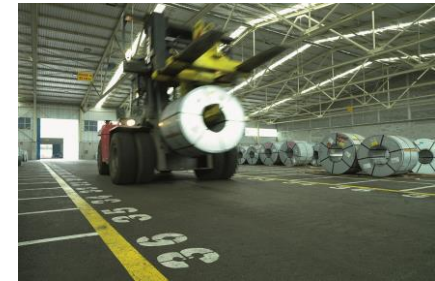
General cargo terminal

- metal and non metal products,
- foodstuff: coffee, sugar, rice,...
- paper cellulose,
- project cargo,
- reefer cargo,
- appliances, electronics,
- timber.



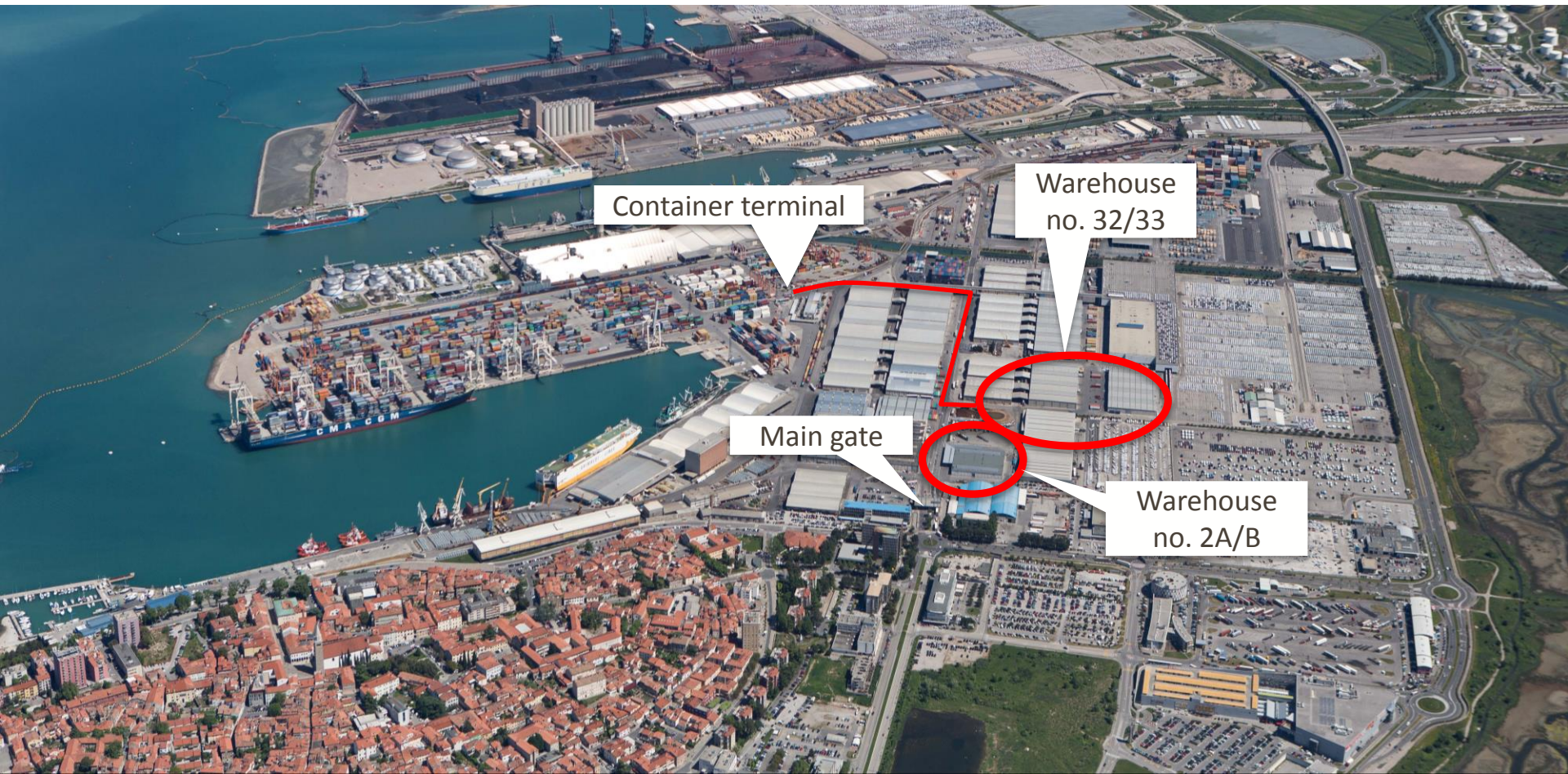
The terminal overview

Berths	6
Operative shore	840 m
Sea depth	7- 12,5 m
Multipurpose closed warehouses	134.000 m ²
Open storage areas	40.000 m ²



Possibility of distribution

- dedicated warehouses for distribution and LCL cargo located inside the port area, close to the main truck gate and in close vicinity of the container terminal



Reefer Terminal

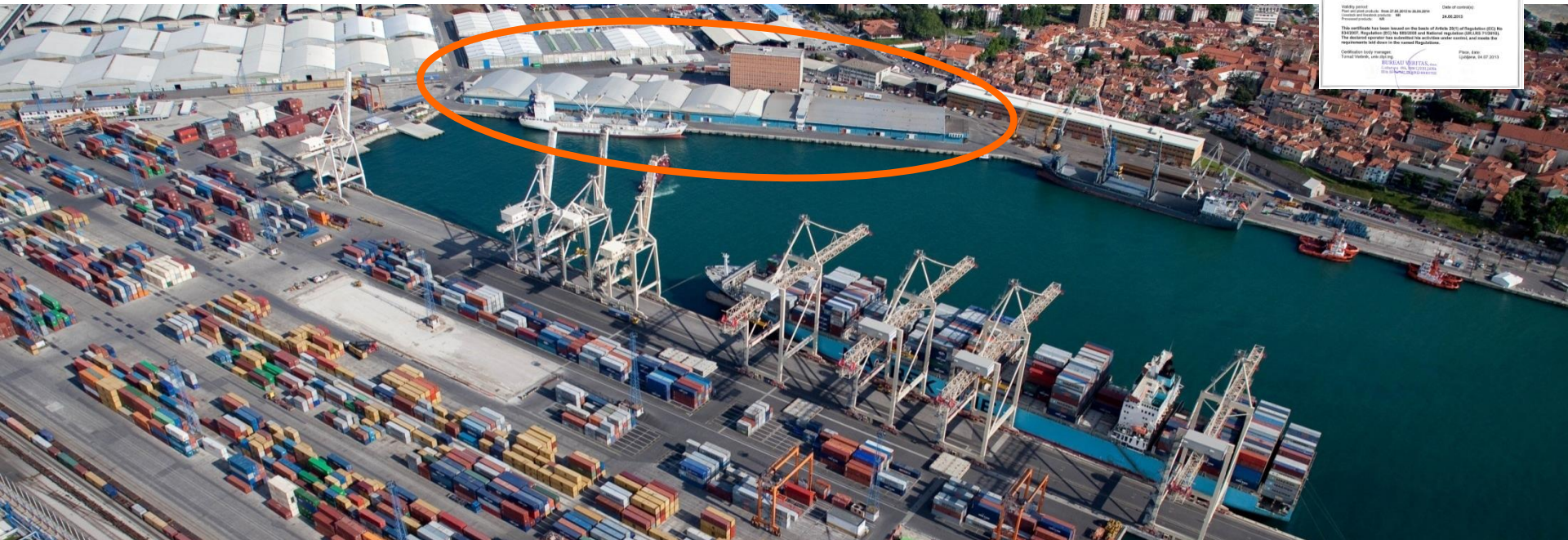
Warehousing facilities:

Max storage at once: 14,300 pallets (25.800 m² 0 °C to + 20 °C)

+ 1,500 pallets in refrigerated rooms (2.000 m² up to - 18 °C)

- Unstuffing & reloading truck capacity: **200 (40'ctn)/day**
- Ripening facilities for bananas (1800 tons/month), palletizer
- Reefer electrical outlets: **290 + 344 at Container terminal**
- Covered areas: 3.600 m²
- Xsense® temperature Cold Chain sensors installation
- HACCP, ECO certification
- Phytosanitary inspection at the terminal

Eco certificate



Reefer terminal activities

- **priority** in direct delivery of reefer ctn from Cont. terminal to Reefer terminal, empty reefers back on the same vessel
- immediate stripping and truck loading, **24/7**
- bananas, potatoes, citrus, deciduous fruit, frozen meat, dairy products, various vegetables & highly perishable goods - cut flowers to NL auction, strawberries, pharmaceuticals



Experience in fresh produce handling

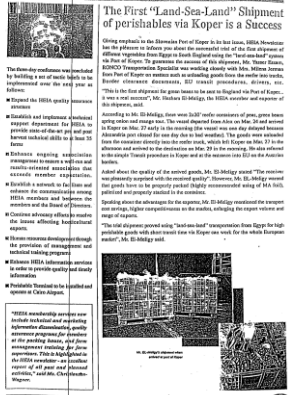
1st EU port for Egyptian grapes in 2015



EU apple exports to Egypt, etc.



HEIA Newsletter, March 2000: first Egyptian seashipment of green beans & strawberries to UK & NL (alternative to air shipments)



In May 2009, at the Fresh produce logistic conference in Alexandria, Luka Koper was awarded as the best service provider in Mediterranean for 2008.

Koper as EU fresh produce distribution centre

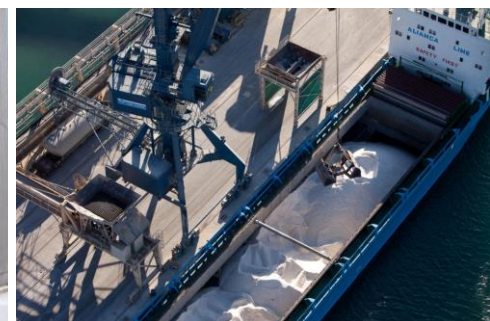
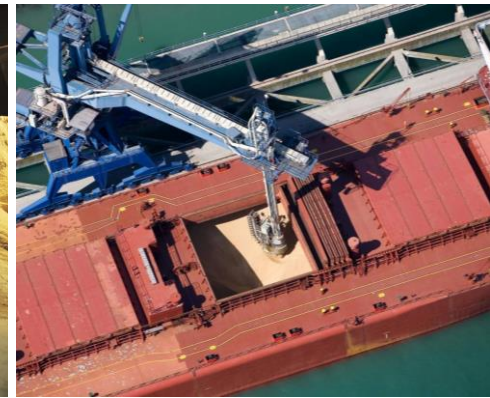
Fast entry of goods into EU: flexibility, smooth work during weekends
including service of inspections and customs, simplified custom clearance



Dry bulk terminal - cargo segments

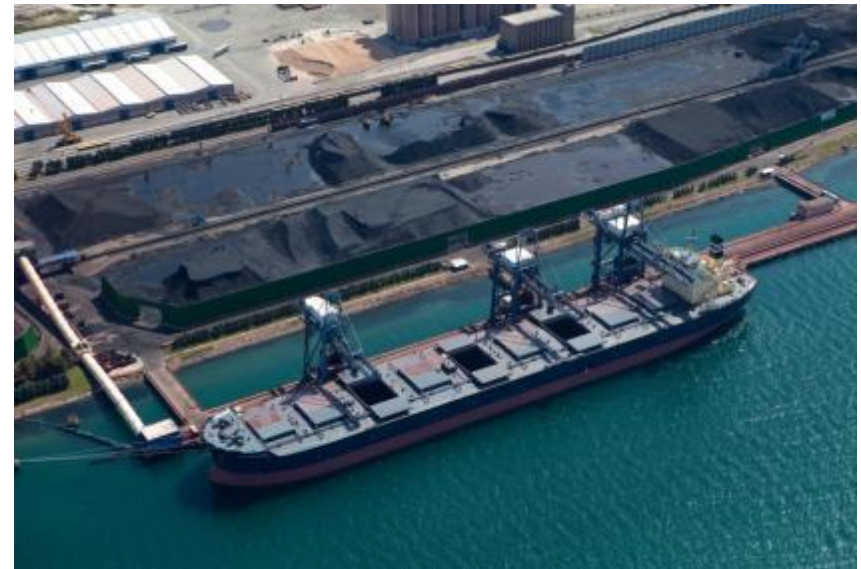
- Cereals,
- Fodder
- Grain
- Minerals
- Alumina

- Salt
- Soya (beans, pellets, meal)
- Maize
- Wheat
- Sugar beet pellets
- Rape-oil seeds
- Sunflower seeds
- Barley



European energy terminal

- coal & iron ore,
- fuels,
- chemicals.



Cruise terminal

- emerging Adriatic destination,
- 57.893 passengers and 49 cruise ship calls in 2015.



Car & Ro-Ro terminal

- gateway for more than 20 global car producers,
- import and export flows.



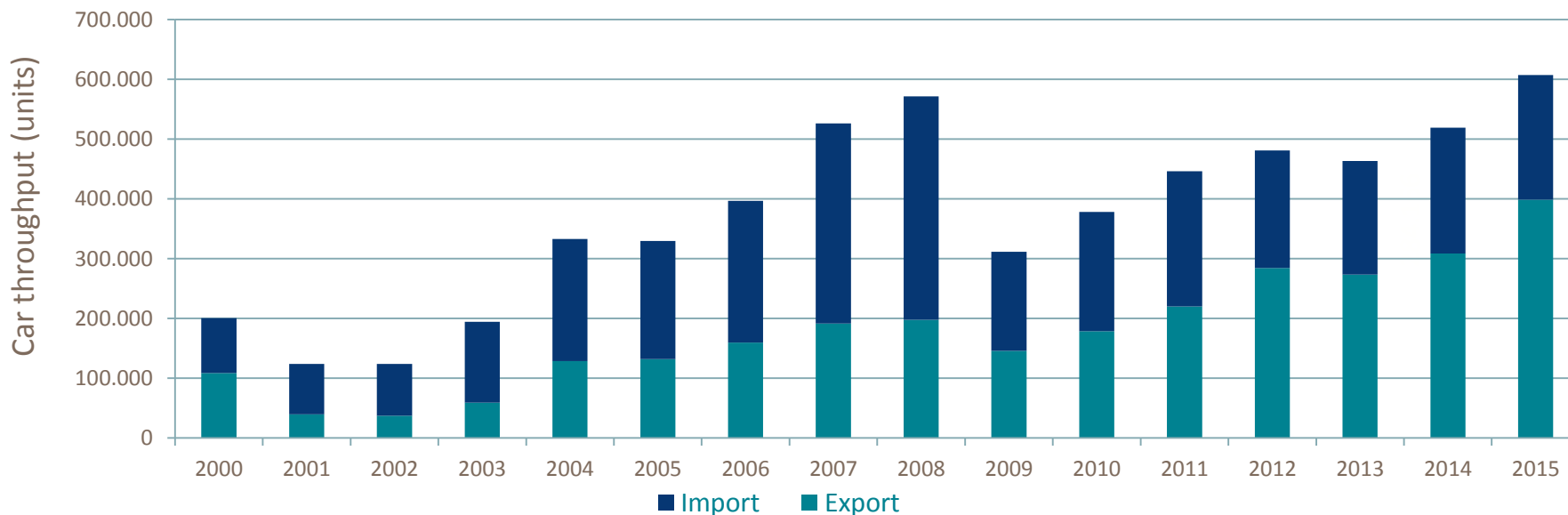
Car throughput

2015: 607.326 units

Import – Far East and Turkish production:



Export – European production and transshipment:



Short sea shipping weekly services

- offered by following shipping lines: Neptune, Grimaldi, MCCL, etc.
- possibility of spot shipments across all Mediterranean



The container terminal

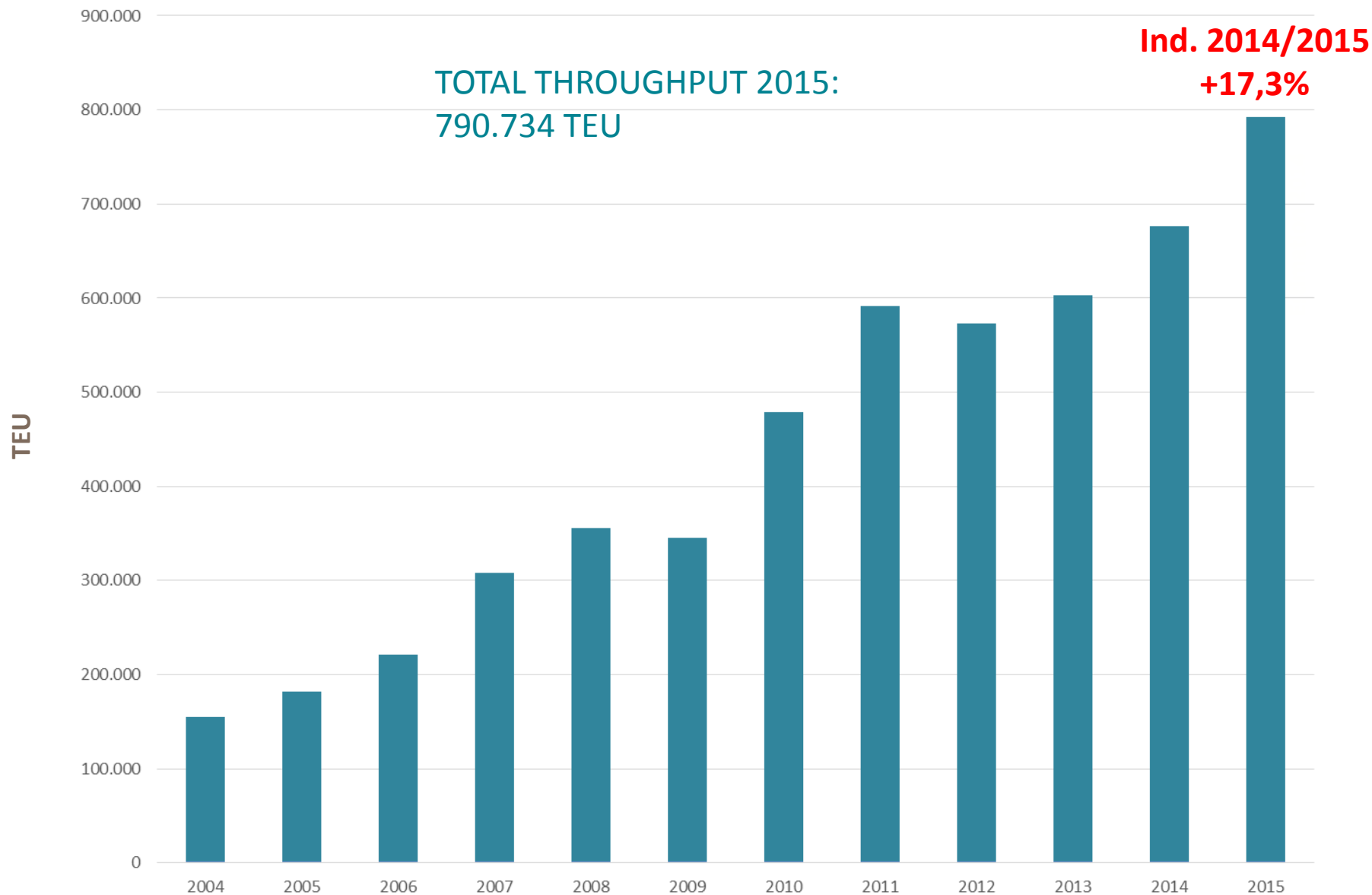


Container terminal in numbers

Operational quayside	600 m
Max allowed draft	14.5 m (-15 m depth)
Berths	4
Railway tracks	New 5 x 700 m, 2 x 270m, 2x300m
Storage capacity – marine terminal	19.130 TEU (full & empty)
Storage capacity – depo	9.547 TEU
Reefer points	344
Total terminal area	270.000 m ²
Stacking area	180.000 m ²
Estimated total annual capacity	950.000 TEU



Container traffic from year 2004 - 2015



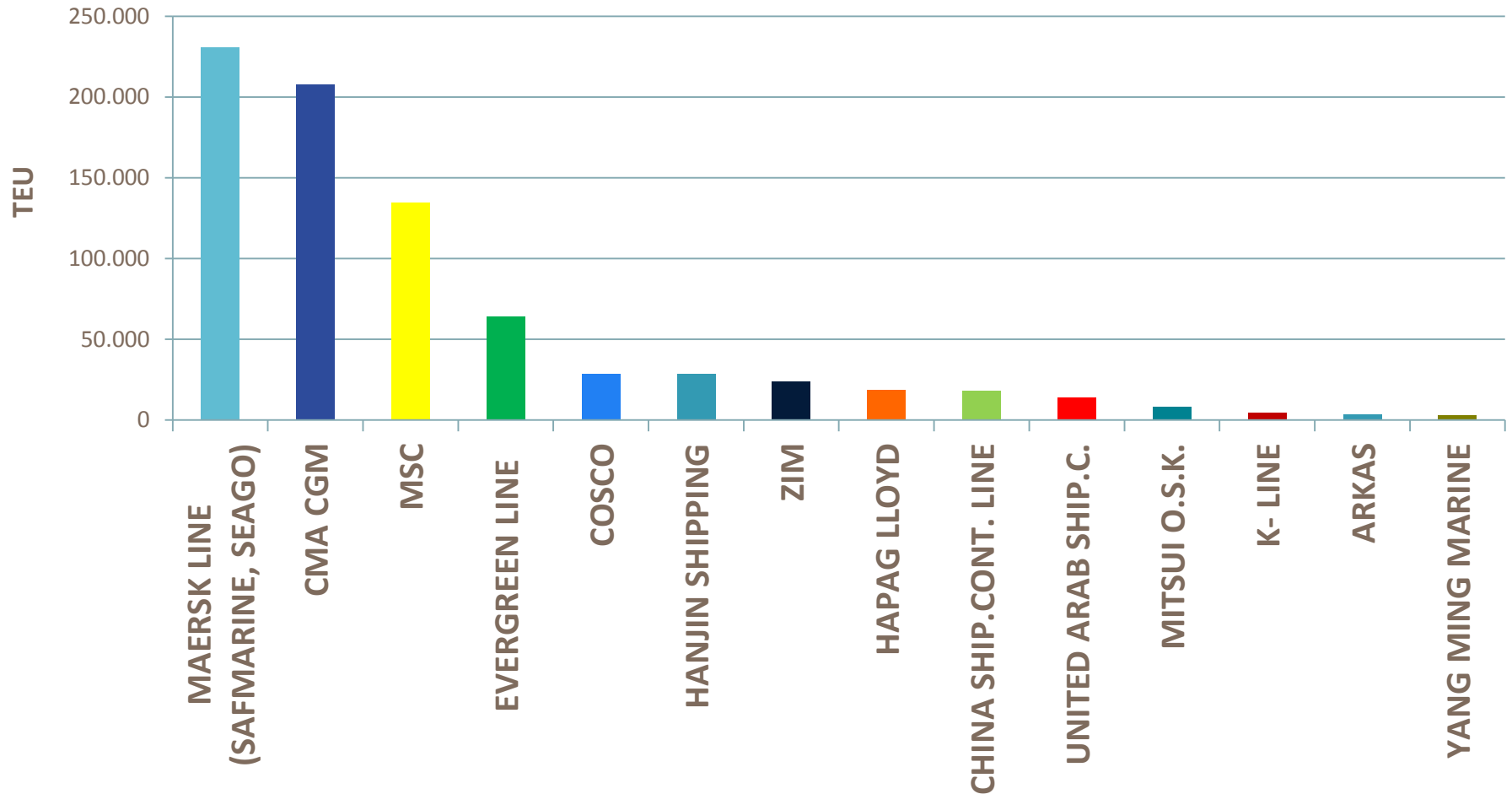
Growth comparison 2014 - 2015

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

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

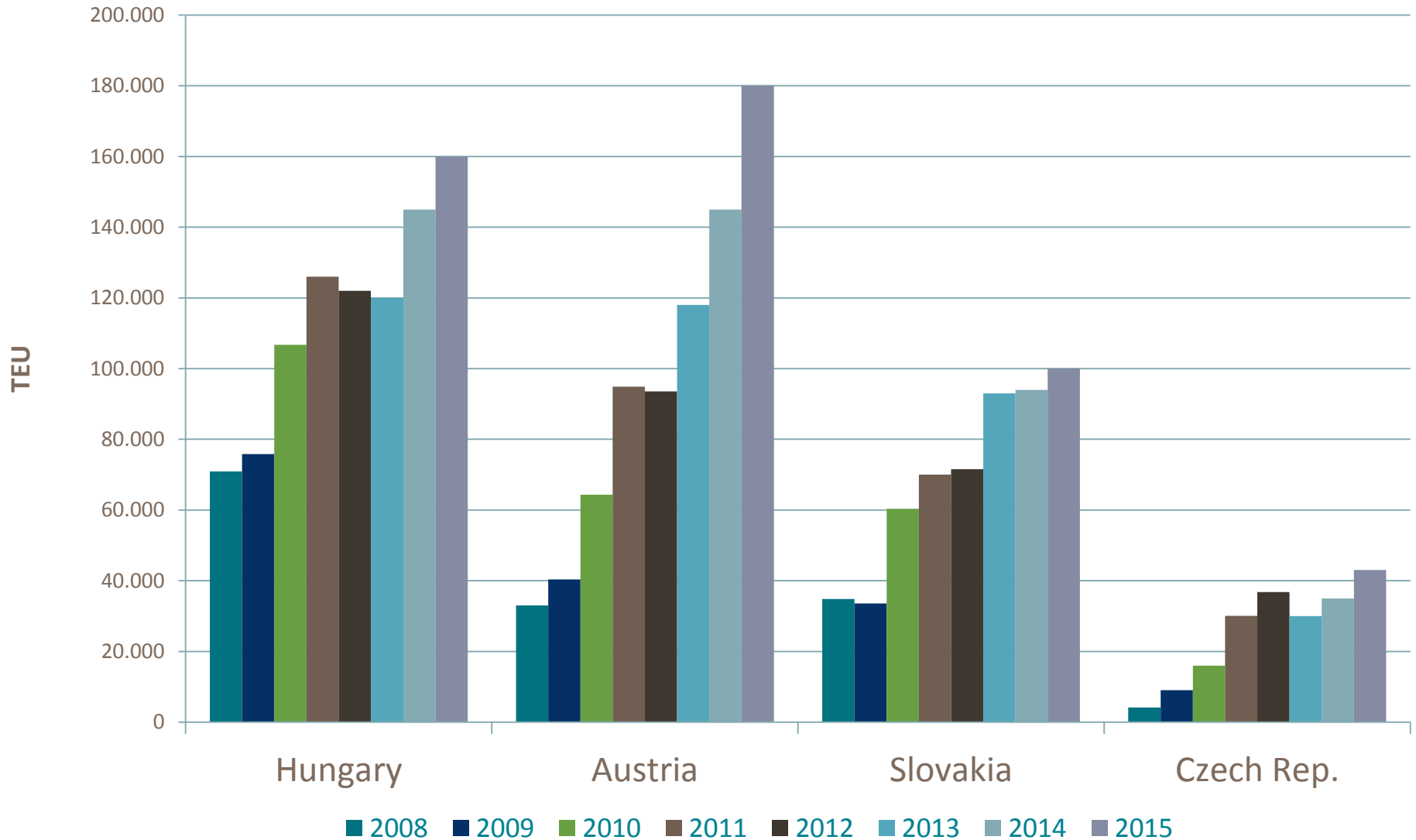
Container throughput by shipping line

top 15 shipping lines in 2015

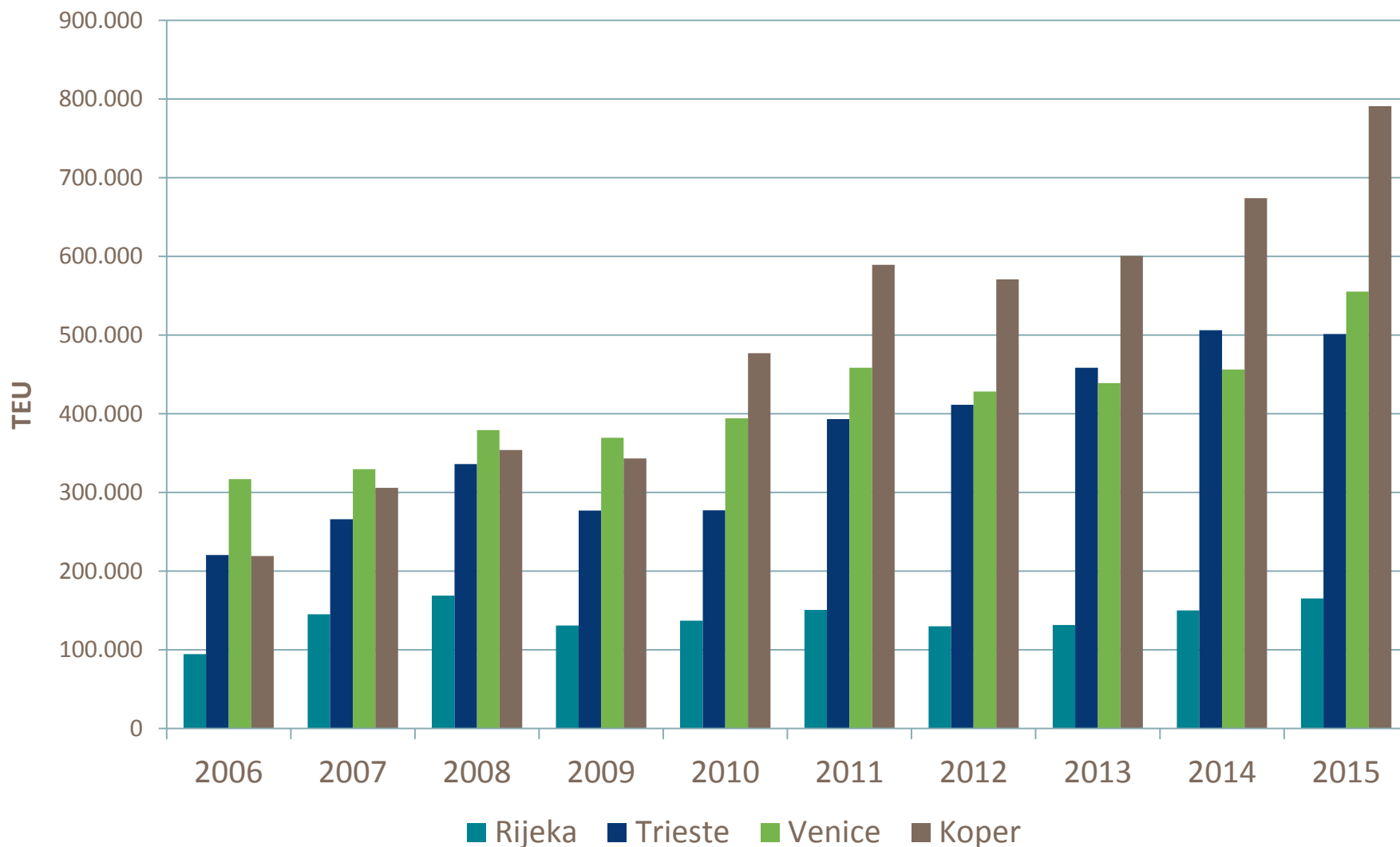


Top 4 foreign container markets

Full TEUs + stuff + strip, estimated volumes

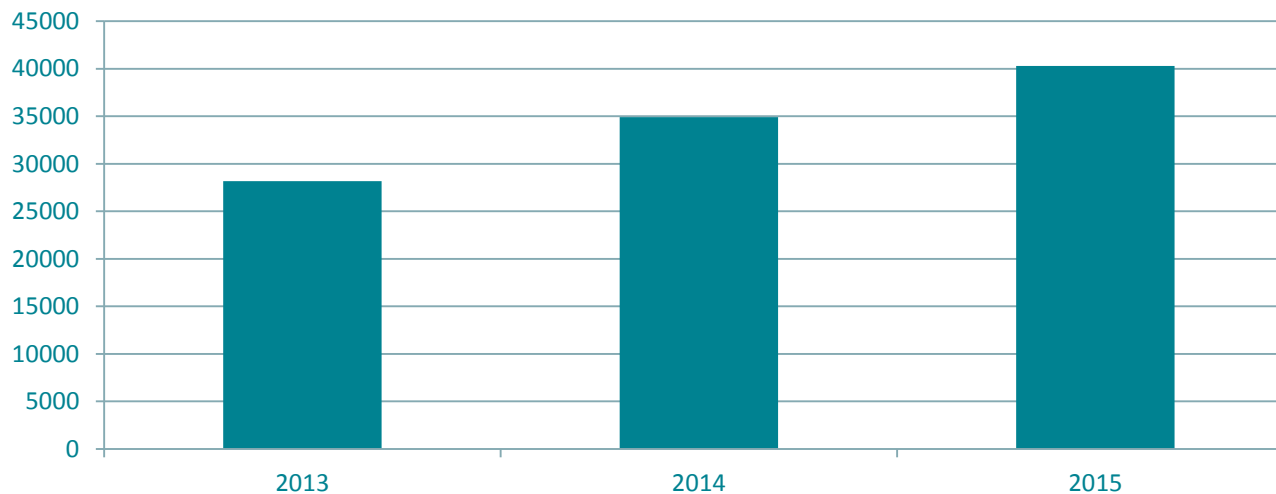


Leading container port in North Adriatic area



Reefer TEU traffic via Koper Container Terminal

Import/export - full



Products:

- fresh produce
- frozen meat & food
- pharmaceuticals
- Cosmetics
- electronics etc.

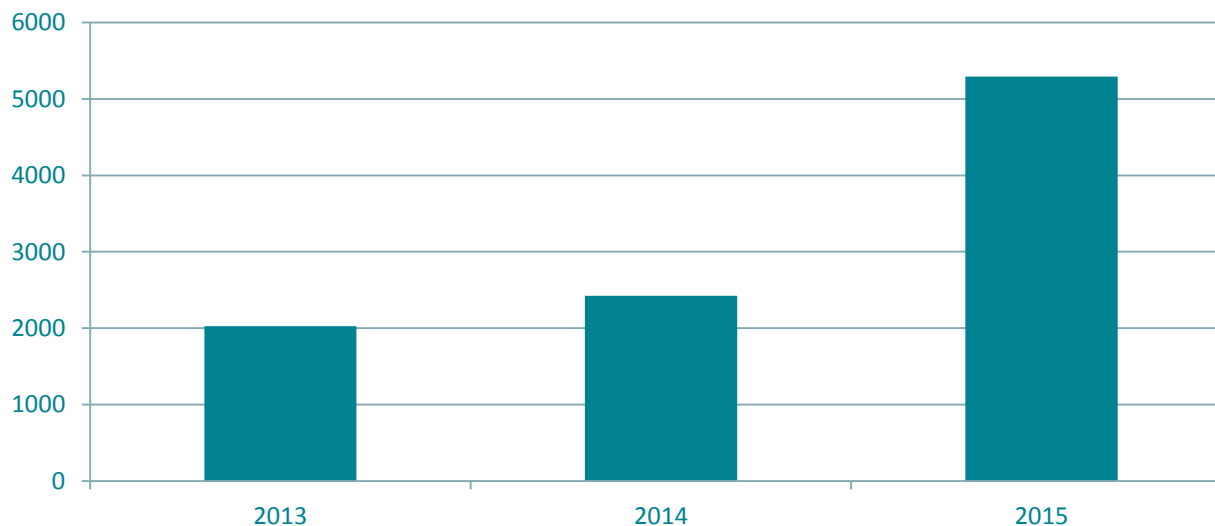
Destinations:

mainly Mid & Far East

Provenience:

- Egypt
- Near, Mid & Far East
- Equador

Egypt: import/export full



Developing efficient and competitive container railway services

*„A daily average of **11-12 arrivals and 11-12 departures** of block container trains to various destinations“*



Regular railway container services



SLOVENIA	Koper – Ljubljana – Celje – Maribor (Adria Kombi)	2 trains/day
GERMANY	Koper - Ljubljana - München (Adria Kombi)	5 trains/week
CZECH REPUBLIC	Koper - Dobra u Fridku Mystku (Adria Kombi) dedicated	4 trains/week
	Koper – Paskov (AWT) dedicated	2 train/week
	Koper – Ostrava (Metrans)	2 train/weekly
	Koper – Prague /Zlin/Č. Trebova/Plzen - via Dunajska Streda (HUB) (Metrans)	Daily (up to 14 trains/weekly)
HUNGARY	Koper – Budapest (Adria Kombi)	7 trains/week
	Koper - Debrecen via Budapest (Saigo Logistics)	2 trains/week
	Koper – Budapest (Integrail)	3 trains/week
	Koper – Budapest (Metrans)	Up to 14 trains/week
SLOVAKIA	Koper - Žilina (Adria Kombi/RCO) dedicated	Up to 6 trains/week
	Koper - Žilina (Metrans)	3 trains/week
	Koper – Bratislava (Adria Kombi/RCO)	4 trains/week
	Koper - Dunajska Streda - Košice (Metrans)	Up to 14 trains/week
SERBIA	Koper - Ljubljana - Belgrade (Adria Kombi)	Up to 2 trains/day
	Koper – Novi Sad via Budapest (Adria Kombi / Transagent)	1 train/week
CROATIA	Koper – Ljubljana - Zagreb (Adria Kombi)	Up to 2 trains/day
AUSTRIA	Koper – Graz (Cargo Center Graz)	5-6 trains/week
	Koper – Villach – antenna to Vienna, Linz, Salzburg, Wolfurt (RCO/Adria Kombi)	Up to 5 trains/week
	Koper – Linz / Salzburg / Enns (RCO / Schenker)	Up 3 trains/week
	Koper - Enns (Metrans)	1 train/weekly
	Koper - Ybbs (Metrans)	2 train/weekly
	Koper - Krems (Metrans)	1 train/weekly
POLAND	Koper – Wroclaw Siechnice – Ostrava – Koper (Baltic Rail)	1-2 trains/week
	Koper – Wroclaw Siechnice – Katowice Wlosienica – Koper (Baltic Rail)	1 train/weekly
BOLGARIA	Koper - Ljubljana - Sofia (Adria Kombi)	On demand
ROMANIA	Koper – Arad (Adria Transport)	On demand

Further market potential

- LCL deliveries, dry boxes, project cargo, reefer cargo
- gaining on faster export delivery to the Central EU client & faster import from Central EU



Direct services from Far East –

Port of Koper the first port of call in Adriatic

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

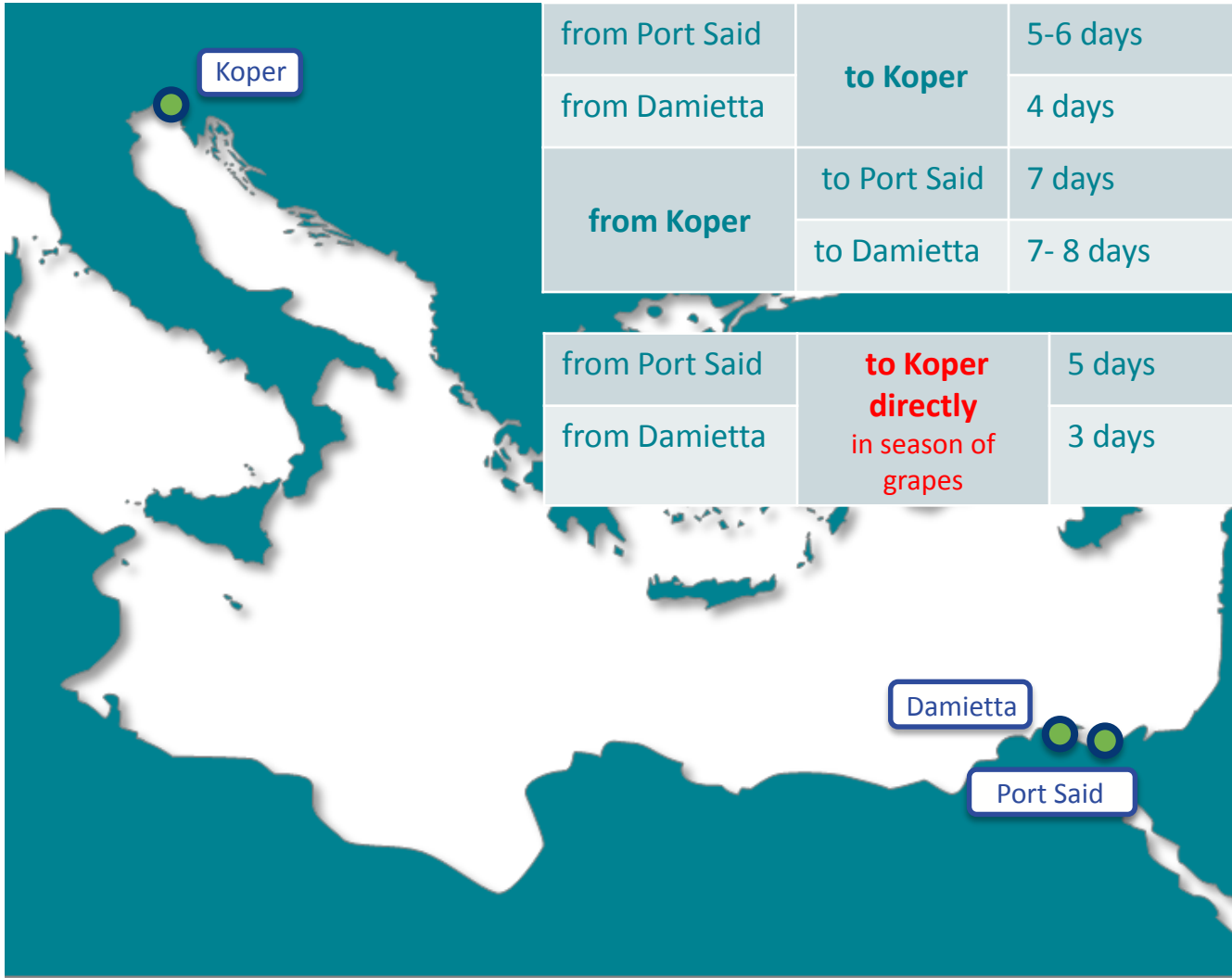


Direct container services Egypt - Koper



Hapag-Lloyd

ADX weekly service

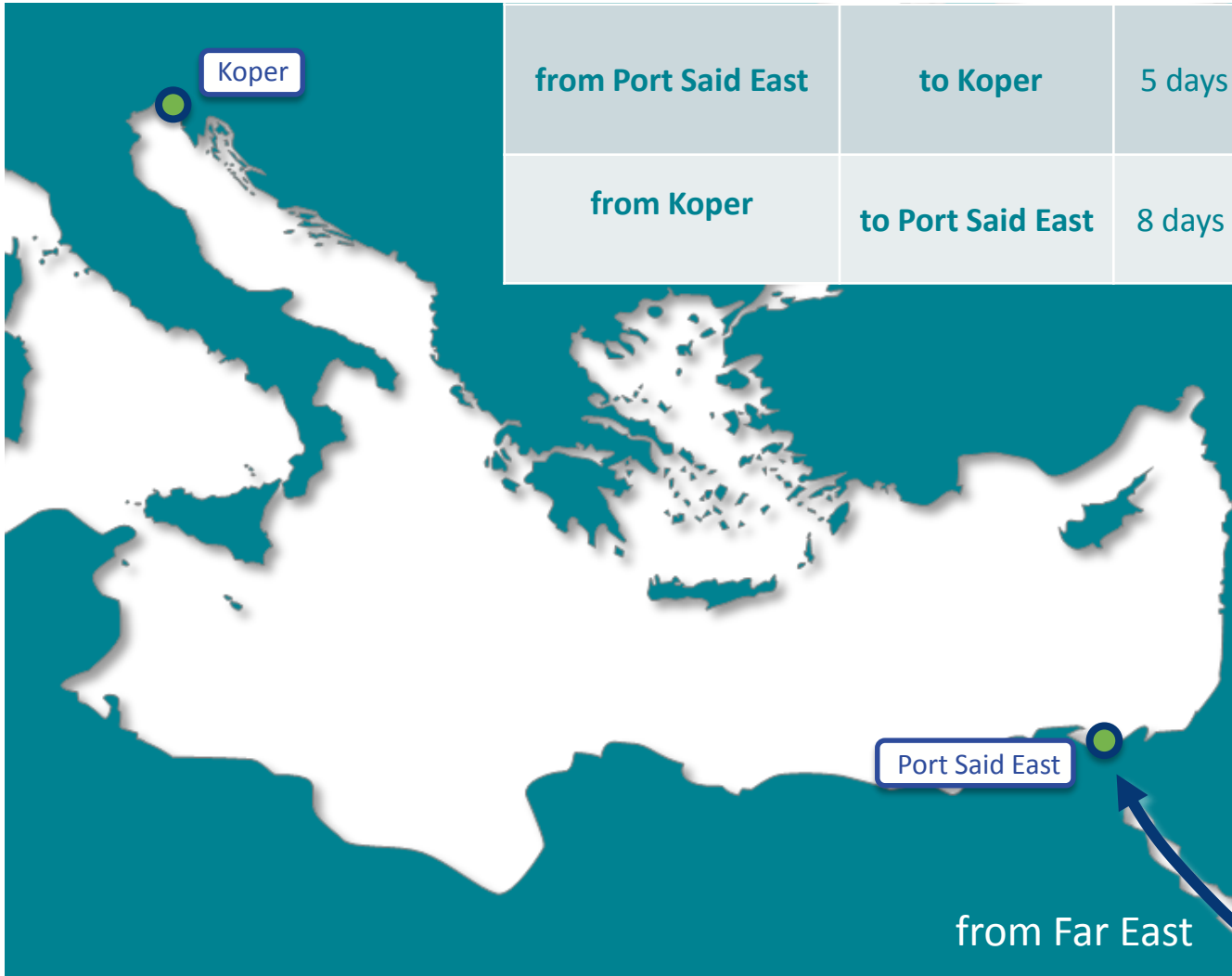


Maersk Line/Seago, MSC

Part of the Asia-Europe service operated by **2M**

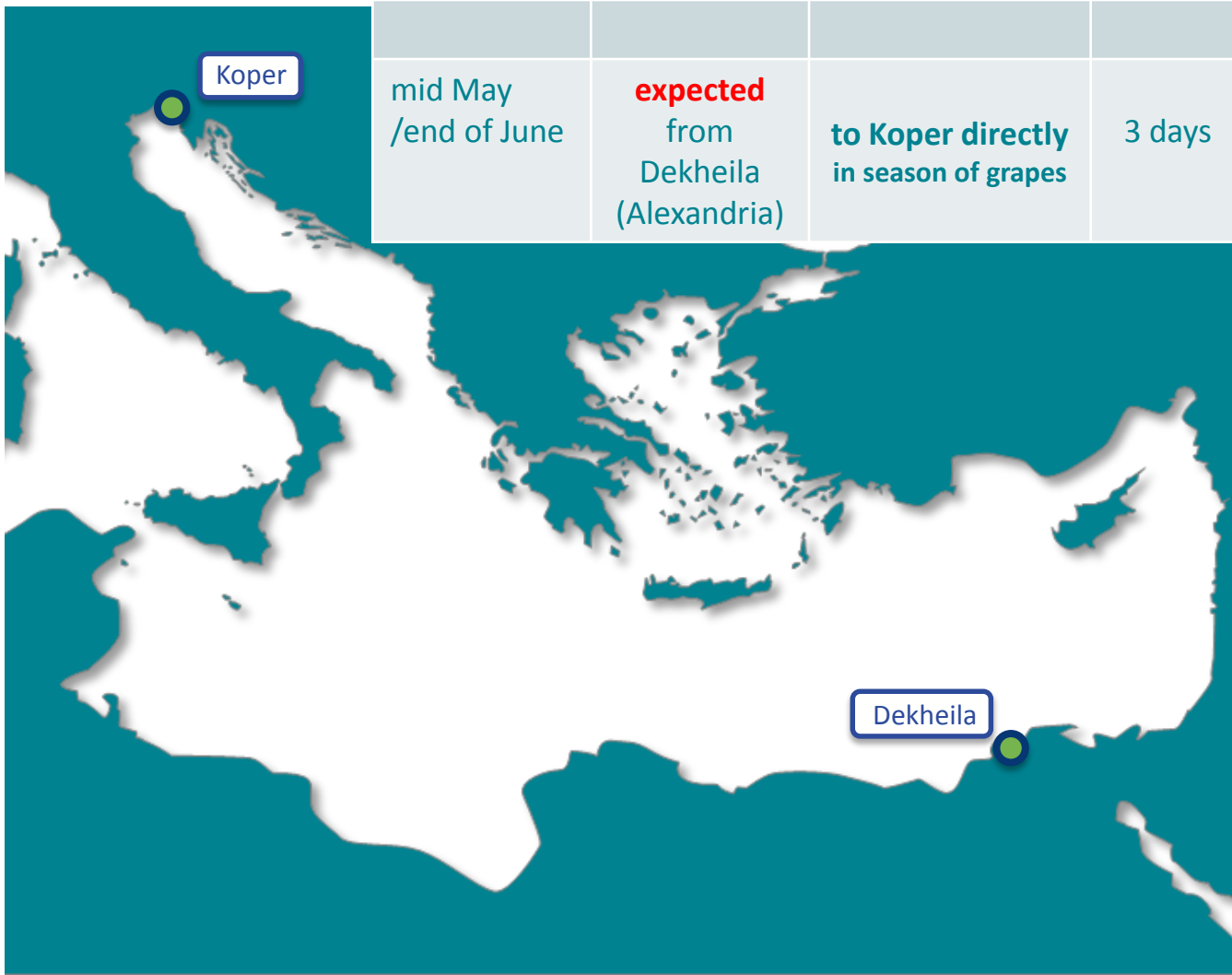


**MAERSK
LINE**

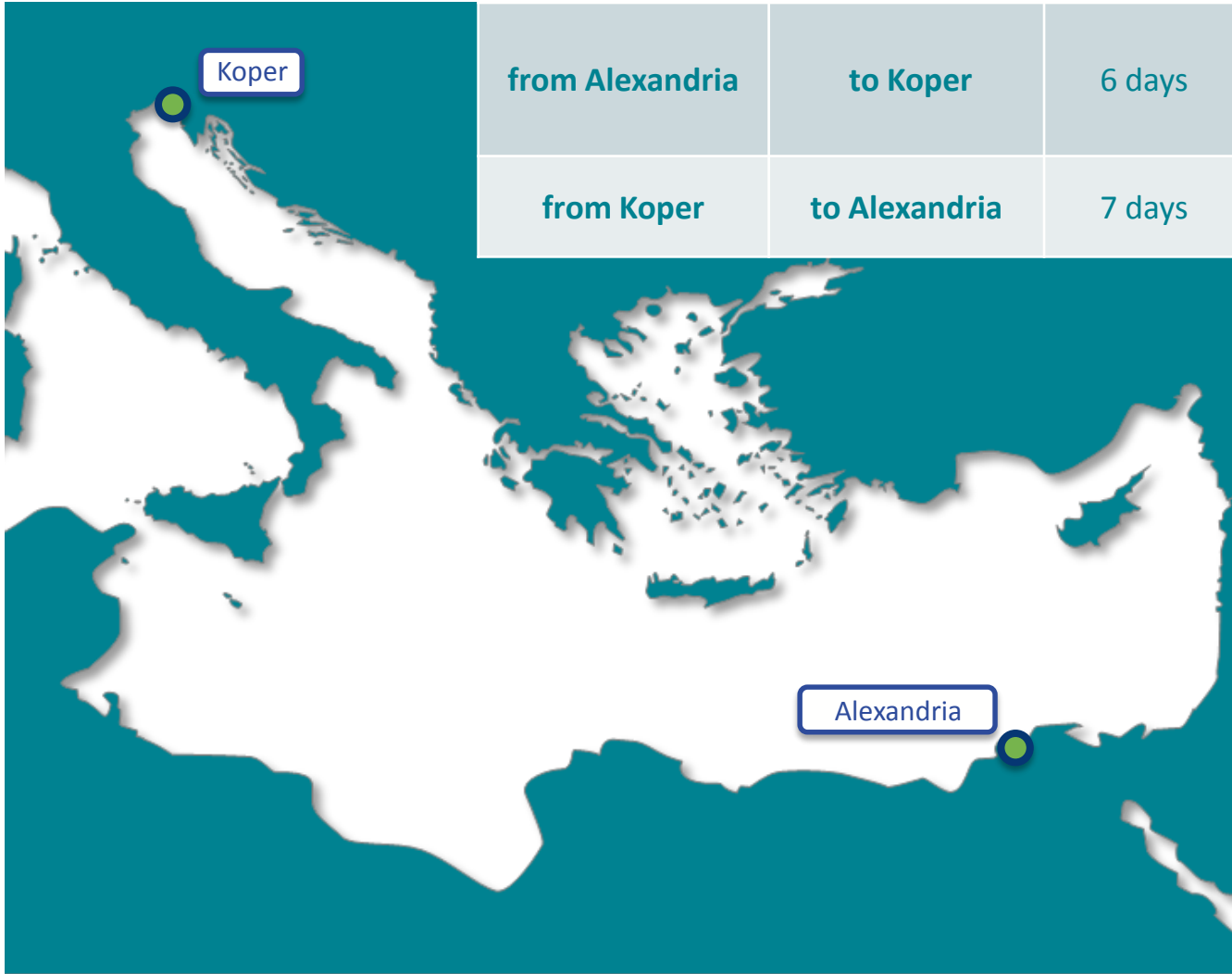


Maersk Line/Seago, MSC (intramed service)





Cosco – IAS service



Arkas – Tarros



Main strategic projects until 2020

Container terminal – 235 mio €



Car terminal – 24,7 mio €



Liquid bulk terminal – 13,9 mio €



Multipurpose warehouse – 42 mio €



Container terminal development (2015 - 2020)



2 additional railway tracks
COMPLETED

North side extension
after 2020

Extension of
south. part, total
capacity 1,3 M
TEU (2019-2020)

+150 m
2019/2020

Dredging to -11 m
COMPLETED

+100 m 2018

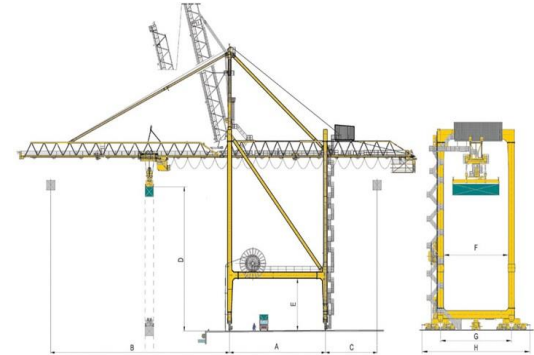
Dredging to -15 m
COMPLETED

Σ 850 m

Equipment orders for container terminal

Ordered 2 Super post-panamax cranes:

- outreach of 24 rows of containers,
- possibility to handle 20.000 TEUs vessel,
- operational in mid 2017,
- additional 2 Super post panamax to be delivered after 2018.



Ordered 2 + 1 Rail Mounted Gantries (RMG):

- covering 5 rail, 2 road and 2 stacking lines,
- operational in early 2017.



Ordered 7 Electric Rubber Tyred Gantires (E-RTG):

- operational in late 2016.



Latest achievements

- „No-strike“ agreement till June 2017,
- ESPO Award in November 2014 for the most environmental friendly European port,
- Pre-clearing customs procedure,
- New direct container services from/to Far East, Middle East & Red Sea,
- Completed additional stacking areas (total annual capacity 950.000 TEU) and two additional railway tracks on Container terminal ,
- New investments on car terminal and liquid bulk terminal,
- Dredging to -15 m completed in October 2015.

Why Port of Koper?

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



ARKAS Line



DUOL



**INTERSERVICE
KOPER**



**TRAMACO
KOPER**



شكرا لاهتمامك

