



Short Sea Shipping in the Baltic Sea Region *Results from the TransBaltic Extension Project*

Adina Cailliaux
Port of Hamburg Marketing
Project Manager

Phone: +49 40 37709 172
Email: cailliaux@hafen-hamburg.de
Website: www.portofhamburg.com



Port of Hamburg
Marketing



Baltic Sea Region
Programme 2007-2013



Project part-financed
by the European Union
(European Regional Development Fund)

- 1. Port of Hamburg and it's connections to the Baltic Sea Region**
2. Project „TransBaltic Extension“
3. Short Sea Shipping in the Baltic Sea Region
4. Conclusions and Outlook

Port of Hamburg: in the center of Europe

© Port of Hamburg Marketing

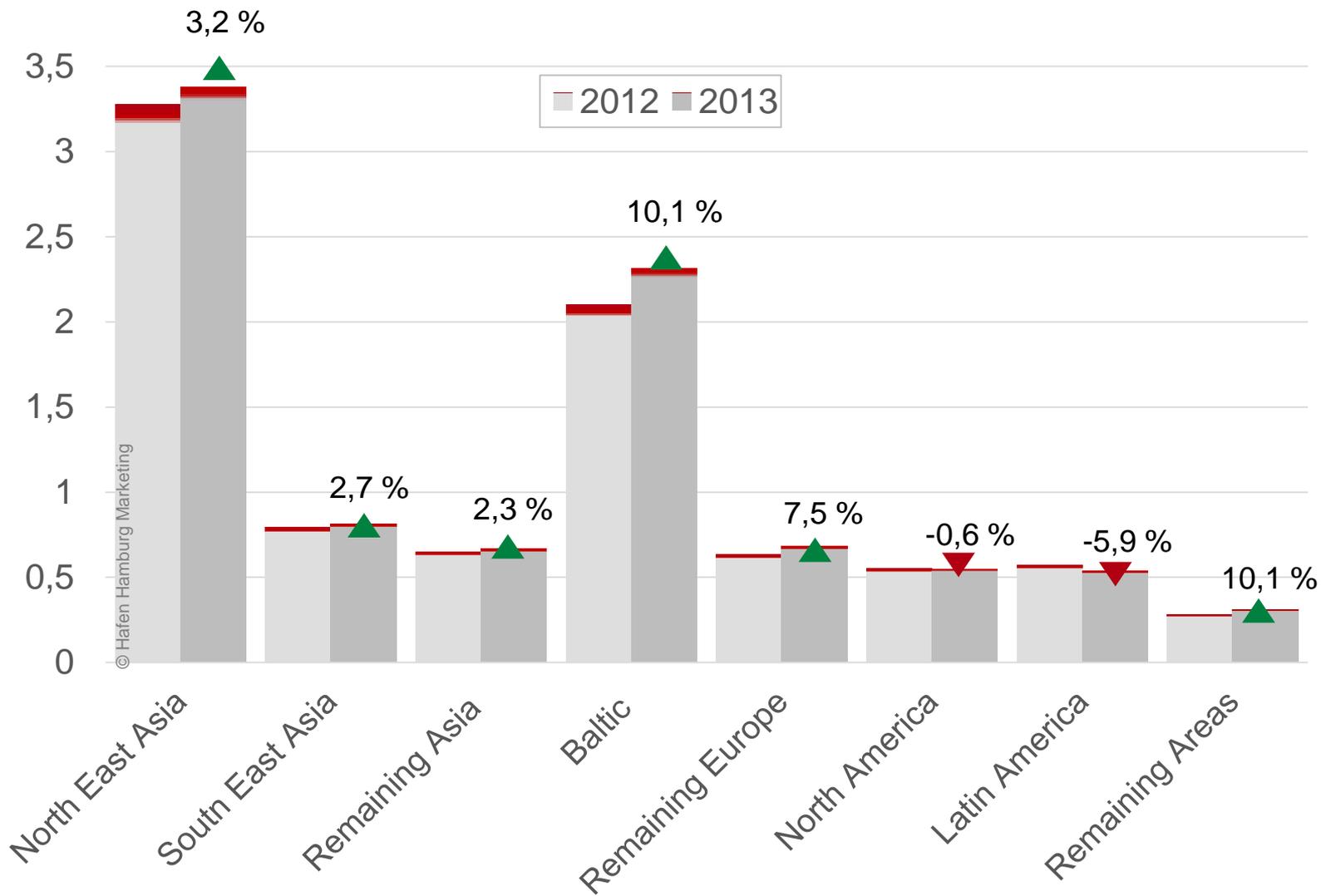


- Hamburg is the second largest European port
- Hamburg is the main transshipment hub for the Baltic Sea Region
- The Baltic Sea is the second most important trade region for Hamburg (after North East Asia)



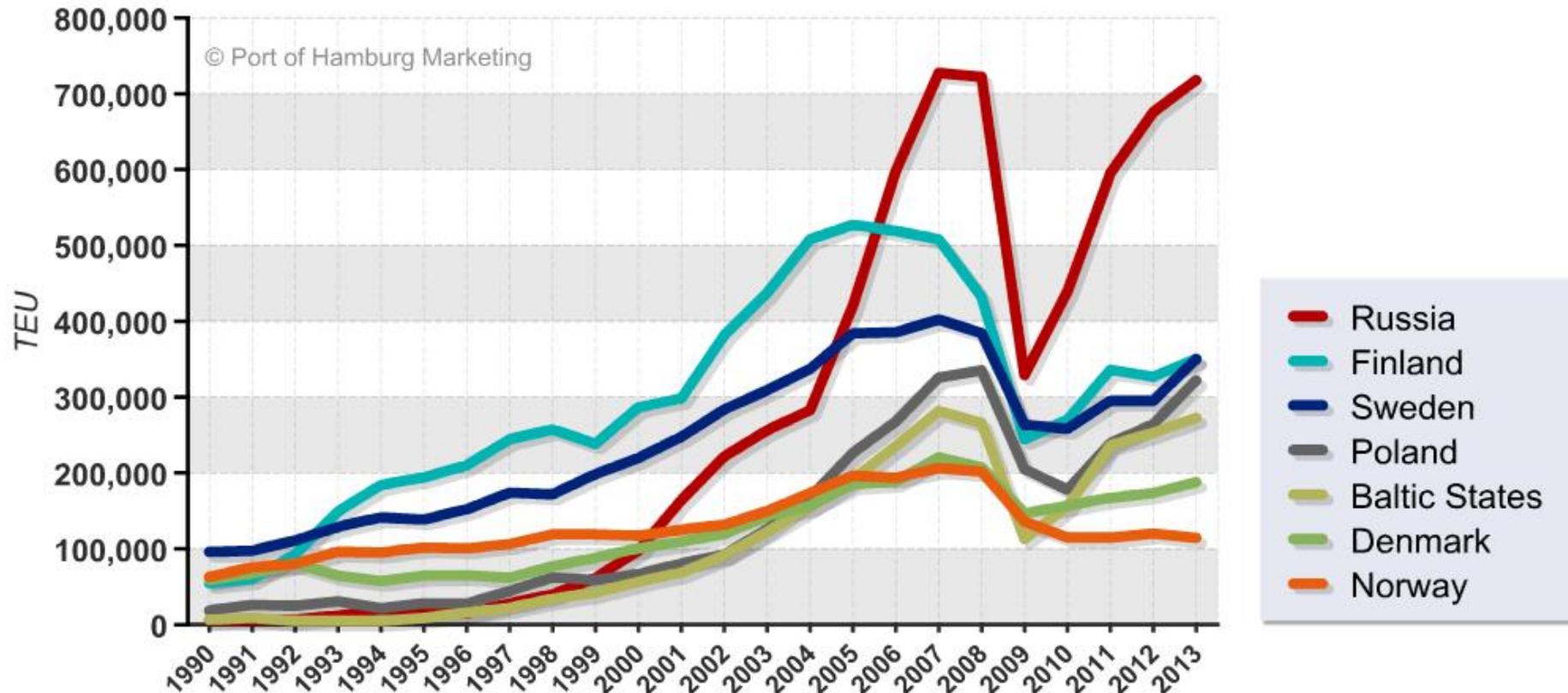
Source: HHLA 2013

Total container handling by trade areas



Port of Hamburg – countries Baltic Sea area

Seaborne container traffic

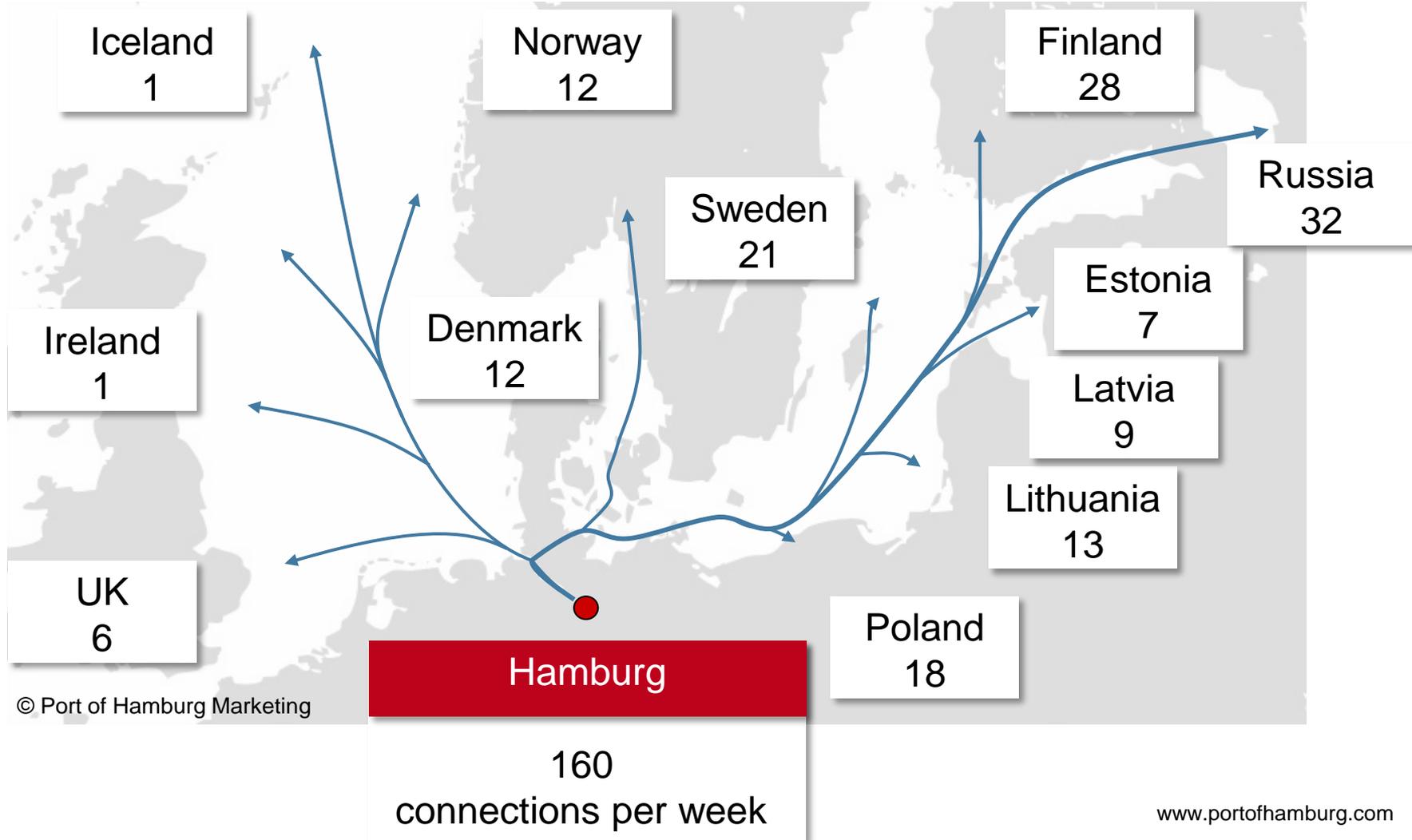


Port of Hamburg: hinterland connections



Port of Hamburg: feeder connections

from the Port of Hamburg, 2013



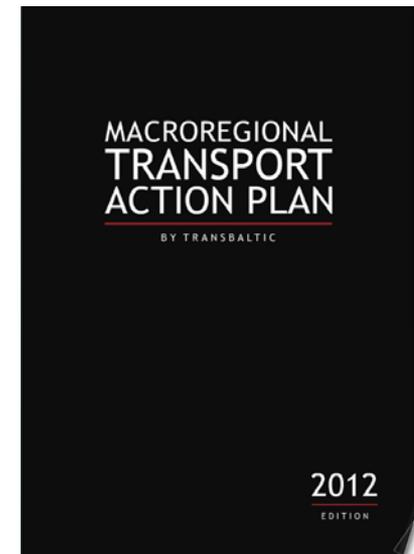
1. Port of Hamburg and it's connections to the Baltic Sea Region
- 2. Project „TransBaltic Extension“**
3. Short Sea Shipping in the Baltic Sea Region
4. Conclusions and Outlook

- VISION: the Baltic Sea Region - a gateway for transcontinental flows and sustainable growth area
- Multimodal transport systems connecting EU and neighbours

- **19 POLICY ACTIONS** addressing system components:

LINKS - NODES - SERVICES - SYSTEM TOOLS (e.g. planning frameworks and regulations)

- Result of cooperation with the **business partners**, based on **market needs**
- Pro-active and future-oriented **policy support instrument**
- **Living document** to be systematically updated and extended!



- A 1-year long follow-up stage, co-funded by the Interreg Baltic Sea Region Programme
- September 2013 - October 2014
- 5 financial partners, 29 supporting organisations, incl. many industry actors
- New policy circumstances:
 - **IMO Sulphur Directive** triggering actions by the Commission and national governments
 - **TEN-T guidelines** with strong transport greening component and accent on implementation
- 4 policy actions found particularly attractive for testing in the market environment

Partners:

- Lahti Region Development LADEC Ltd., Finland (Lead Partner)
- Port of Hamburg Marketing, Germany
- The Institute of Logistics and Warehousing, Poland
- Maritime Institute in Gdansk, Poland
- Port of Bodø, Norway

1. Port of Hamburg and it's connections to the Baltic Sea Region
2. Project „TransBaltic Extension“
3. **Short Sea Shipping in the Baltic Sea Region**
4. Conclusions and Outlook

Definition Short Sea Shipping

“Short Sea Shipping is the transport by ships between European ports as well as non-European ports without any ocean crossing.”

“Carriage of goods by ships among the ports located in the geography of Europe or among these ports placed in non-European countries having a coastline on the enclosed seas around Europe.”

European Commission

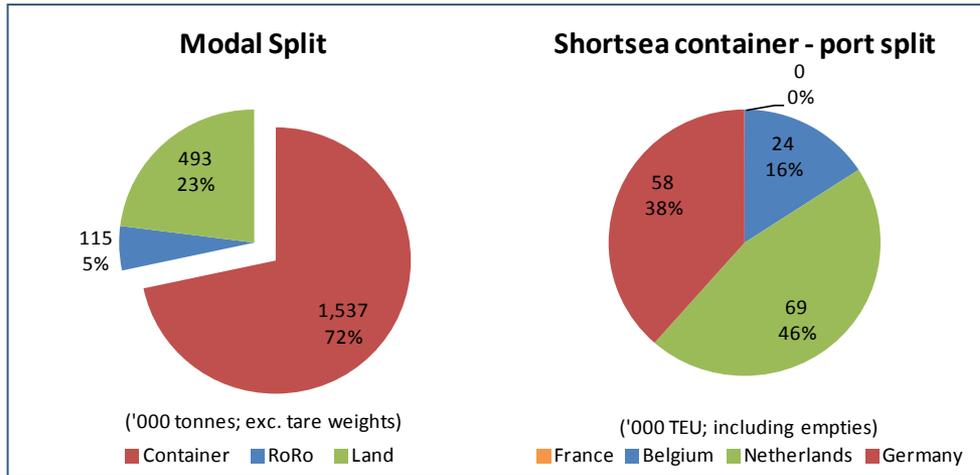
TransBaltic Extension study results

- Conducted by the Institute of Shipping Economics and Logistics (ISL)
- The share of short sea-land container traffic is particularly high if...
 - the distance travelled is long
 - there are high feeder volumes to bundle with short sea volumes
 - sea distances are considerably shorter than land distances
- Total of 1.5 million TEU shortsea-land traffic in the Baltic Sea area in 2012
- ... of which 1.3 million TEU were generated by the North Range ports

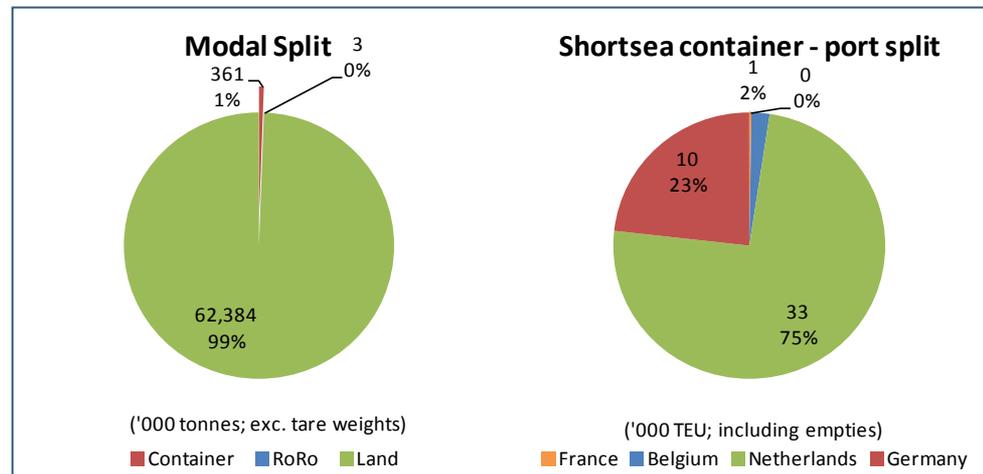
Short Sea Shipping in the Baltic Sea Region

Modal split and short sea-land container volumes

North Range - Finland

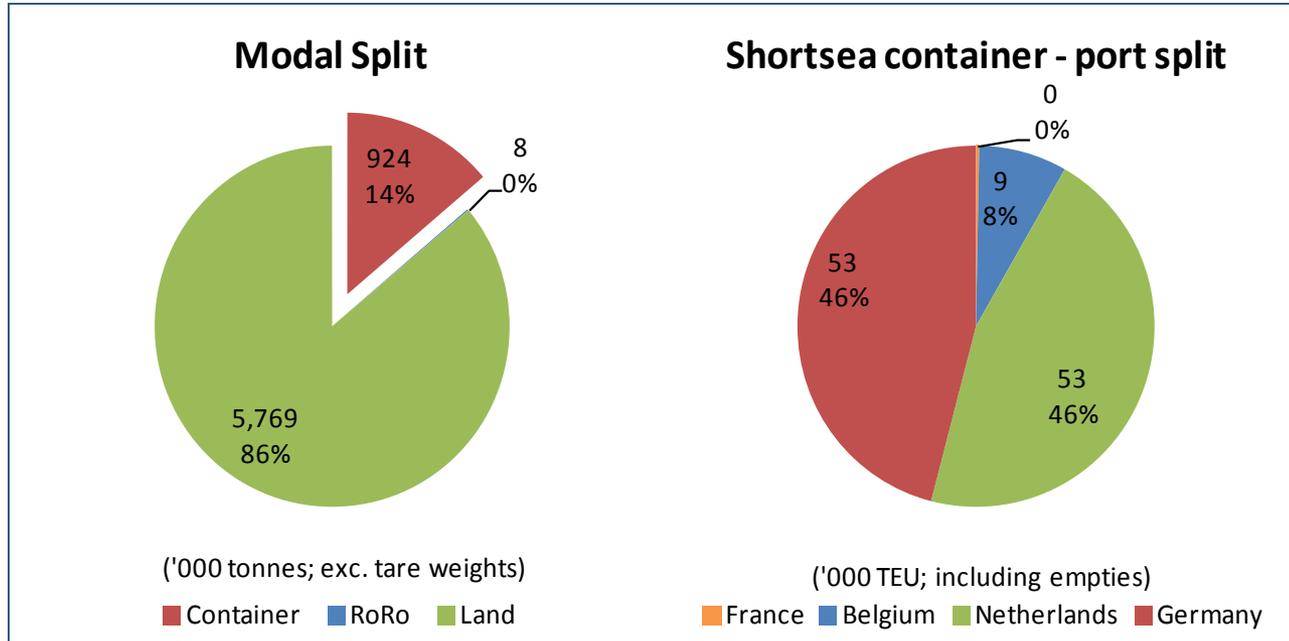


North Range - Poland



Short Sea Shipping in the Baltic Sea Region

North Range – Baltic States



Short Sea Shipping in the Baltic Sea Region

The impact of the SECA-Directive

„The adjusted calculation results in a reduction of trade volumes by 10% until 2020 and 2030 volumes only slightly above the 2012 level.“

2020						
Corr. region	Total shortsea-land container traffic (TEU)		45' containers (TEU)		45' containers (no.)	
	North Range	South Baltic	North Range	South Baltic	North Range	South Baltic
	Russia	457	19	181	6	80
Finland	142	119	85	69	38	31
Sweden	346	52	104	16	46	7
Norway	82	0	49	0	22	0
Baltic States	109	17	57	5	25	2
Poland	50	-	34	-	15	-
Total	1.186	206	509	95	226	42
over 2012	88%	103%	89%	102%	89%	102%

2030						
Corr. region	Total shortsea-land container traffic (TEU)		45' containers (TEU)		45' containers (no.)	
	North Range	South Baltic	North Range	South Baltic	North Range	South Baltic
	Russia	454	21	180	8	80
Finland	162	153	97	89	43	40
Sweden	418	62	126	18	56	8
Norway	86	0	52	0	23	0
Baltic States	128	22	67	7	30	3
Poland	68	-	46	-	20	-
Total	1.316	258	566	123	252	54
over 2012	98%	129%	99%	131%	99%	131%

Source:

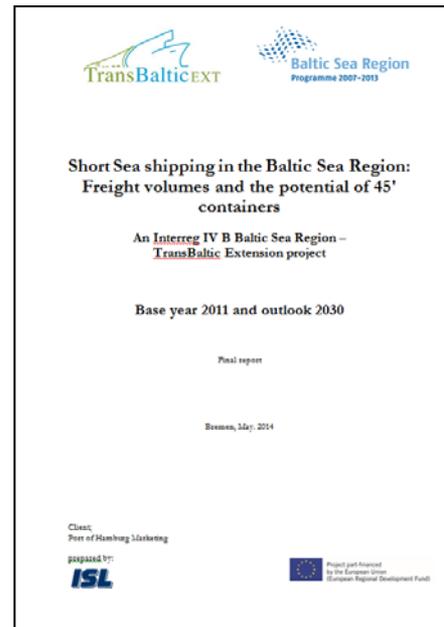
ISL Modal Split Model, 2014

1. Port of Hamburg and it's connections to the Baltic Sea Region
2. Project „TransBaltic Extension“
3. Short Sea Shipping in the Baltic Sea Region
4. **Conclusions and Outlook**

Measures and recommendations

- Subsidize container handling fees of short sea containers
- Support construction of ramps to load containers at shipper's hinterland facilities
- Introduction of EU-wide „grey-boxes“
- Motivate main carriers to accept short sea cargoes on their feeder networks
- Increase marketing efforts in Baltic Sea economies

- Report and further information published on www.transbalticext.fi
- Your feedback is highly welcome! cailliaux@hafen-hamburg.de





Thank you for your attention!

Adina Cailliaux
Port of Hamburg Marketing
Project Manager

Phone: +49 40 37709 172
Email: cailliaux@hafen-hamburg.de
Web: www.portofhamburg.com; www.transbalticext.fi



Port of Hamburg
Marketing



Baltic Sea Region
Programme 2007-2013



Project part-financed
by the European Union
(European Regional Development Fund)