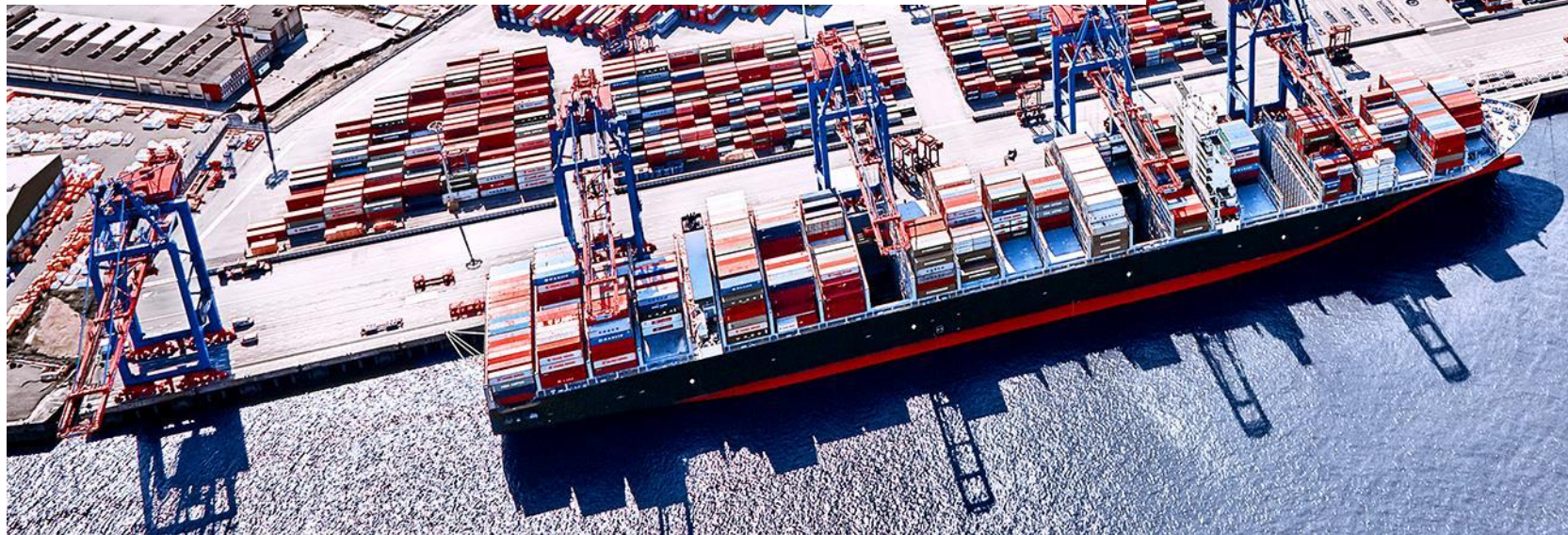


# Current Challenges and Opportunities: Brief Scan on Russian Baltic Ports

Transport Events Webinar, September 3





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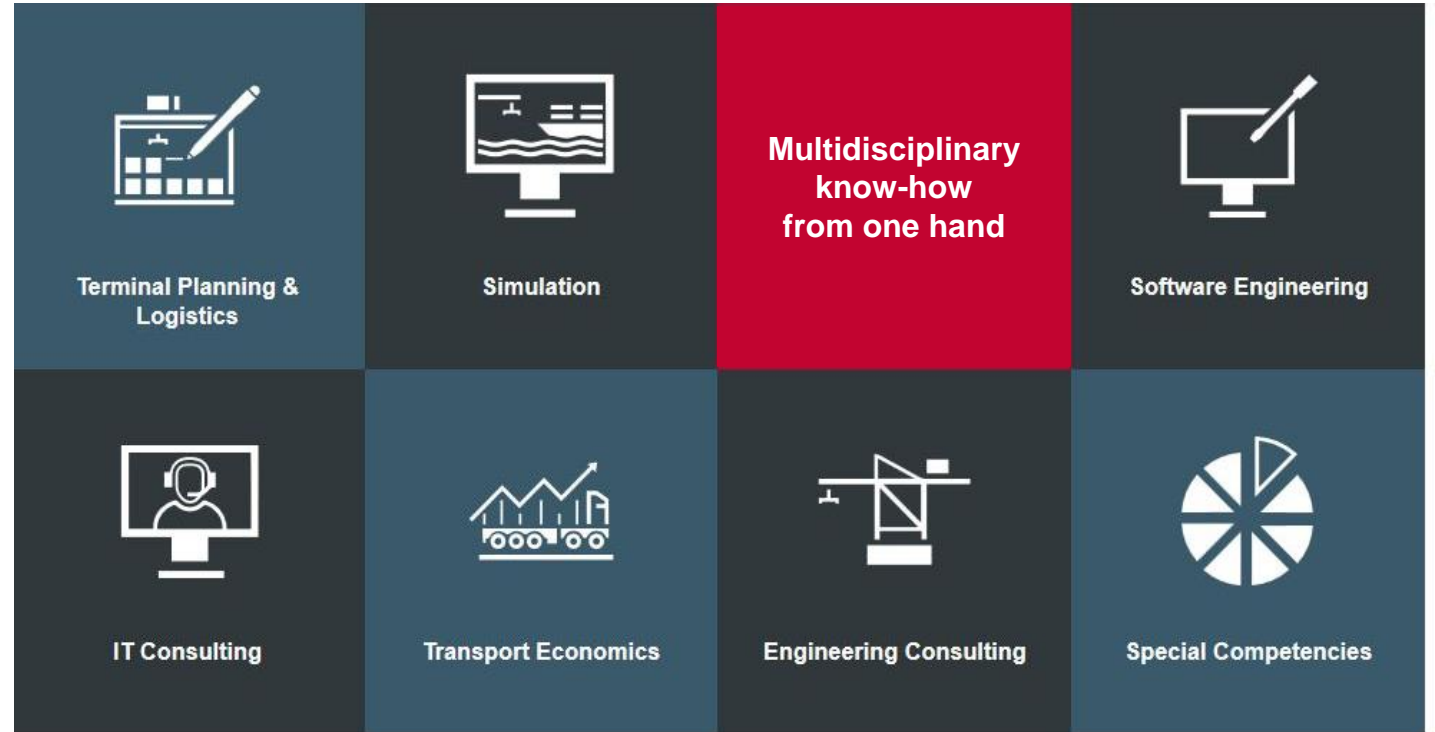
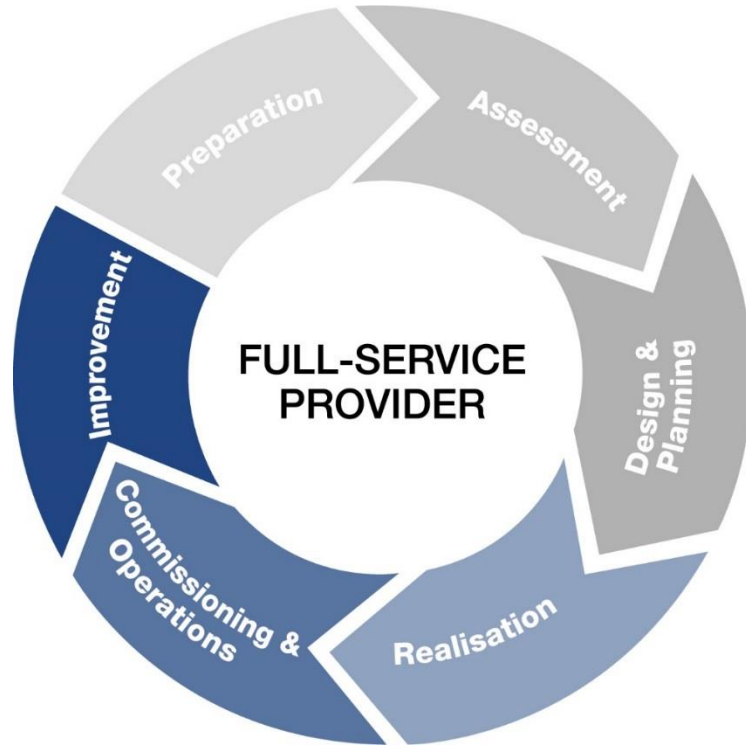


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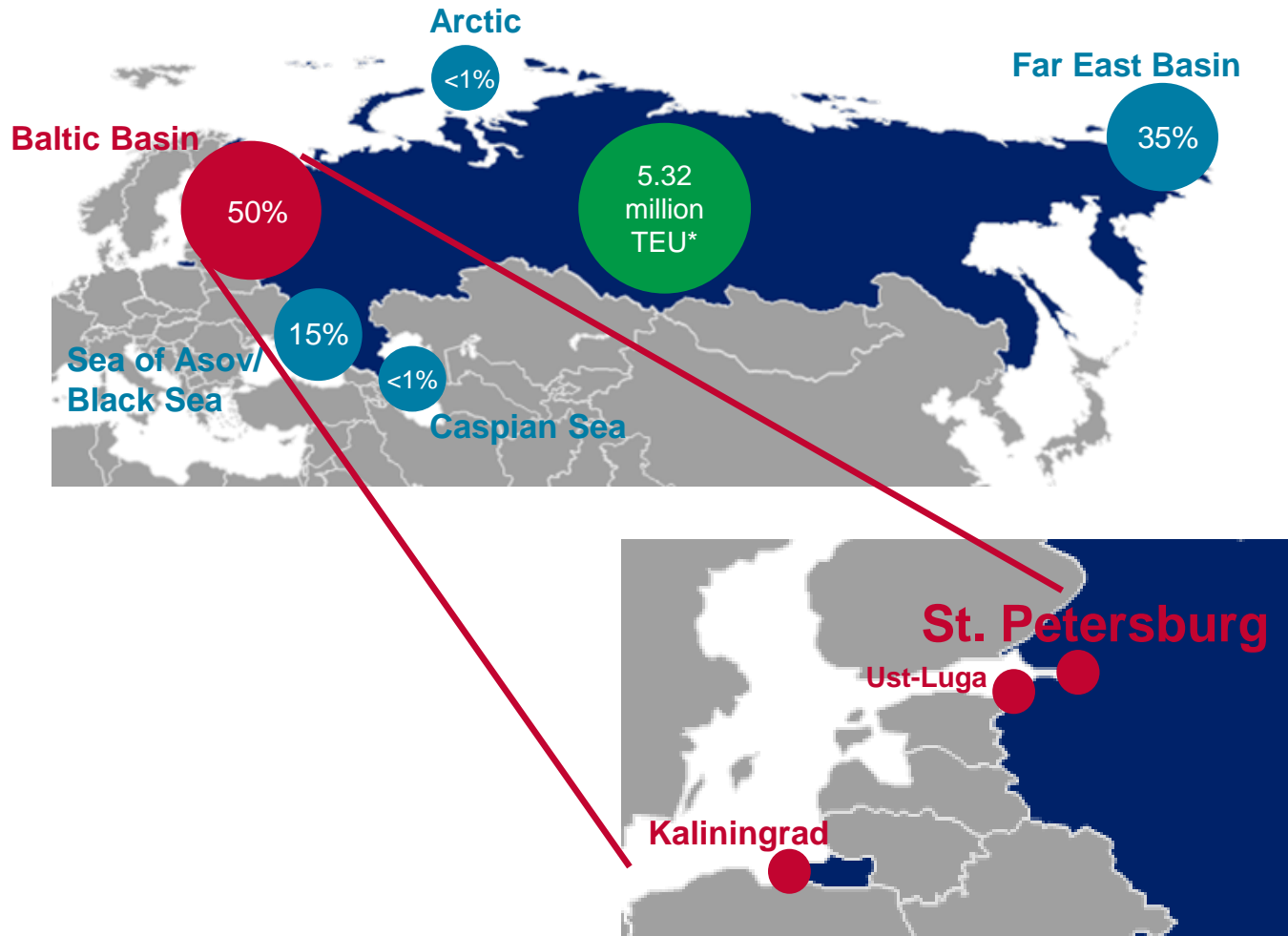
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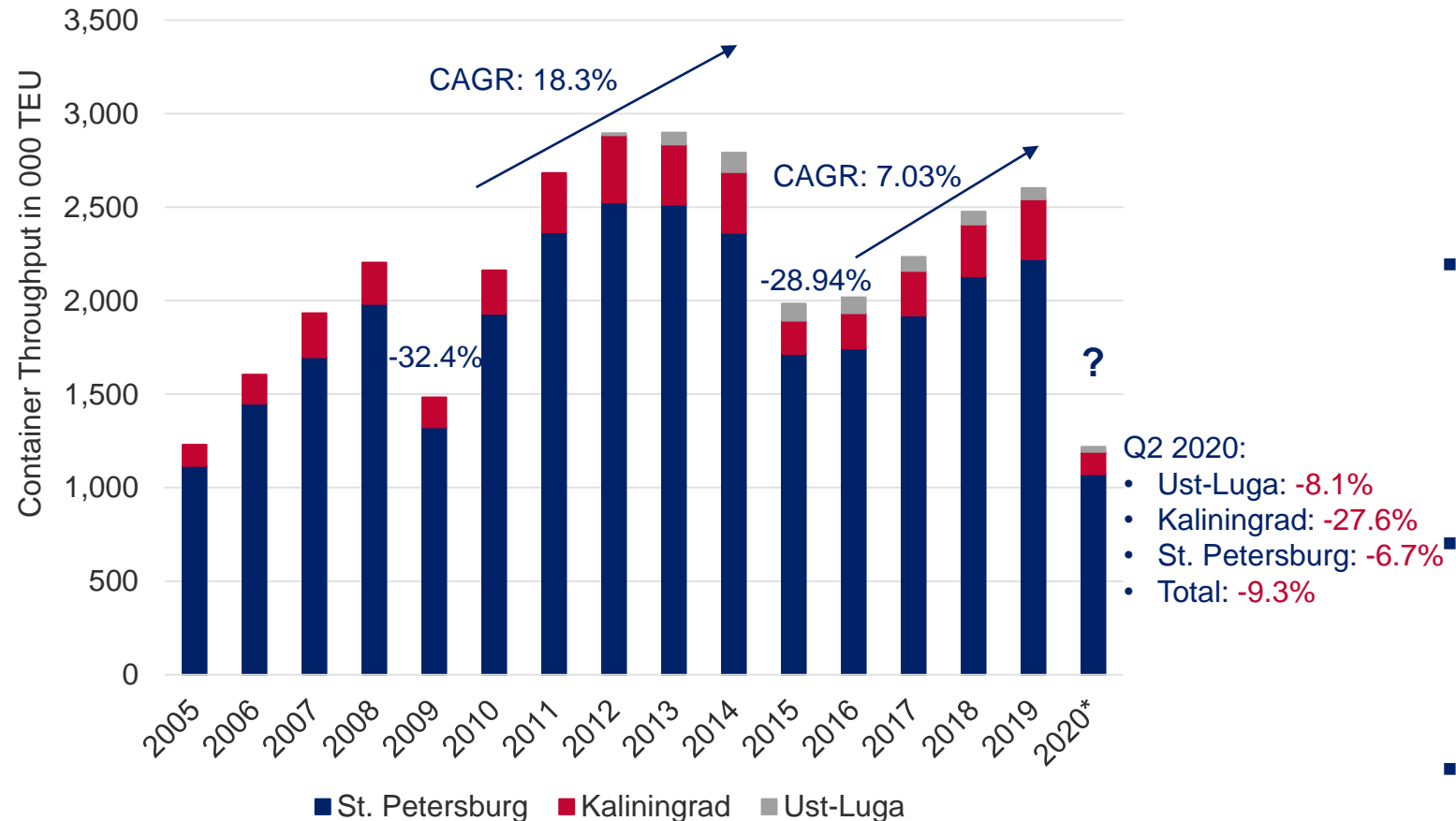
# Russian Baltic Ports handle half of total Russian Container Traffic; Great Port of St. Petersburg is Russia's major Baltic Sea Port



- Russian container ports handled 5.32 million TEU in 2019, primarily for the local market
- About half of Russia's container traffic passes through the country's Baltic Sea ports (50.4% in 2019): Great Port of St. Petersburg, Port of Ust-Luga and Kaliningrad
- St. Petersburg accounted for 85% of the aggregate container throughput of 2.6 million TEU via the Russian Baltic basin sea ports in 2019 compared to Kaliningrad (12%), and Ust-Luga (2%)
- With seven container handling terminals (thereof four major ones), St. Petersburg is the main gateway for Western Russia which inhabits 78% of Russian total population of 145 million people; key markets are the Metropolitan area of St. Petersburg (~5 million people) and Moscow (~20 million people)

Note: \*Refers to 2019; Source: Russian Statistical Office

# Russian Baltic Ports confronted with various downturns over past 15 years; Strong drop in volumes amid Covid-19 Pandemic, though less than expected



- The global financial and economic crisis (2008/9), the plunge in prices for oil – the country's key export - and economic sanctions (2014) hit Russian Baltic ports hard; Gradual volume recoveries observed
- Global economic contractions caused by the swift and massive shock of the Covid-19 pandemic and shutdown measures to contain again have strongly pulled down throughput volumes in 2020 (Q2: -9.3%)
- Russian economy shrank at 8.5% in Q2, though less than expected; Commodity, retail, transport and services sectors were most affected while agricultural sector grew
- Short/medium run throughput development difficult to forecast; depending amongst others on potential second lockdown in Russia, Europe and Asia

Note: \*Q2; Source: Russian Statistical Office



# Realizing growth potential for Russian Baltic Ports in the Medium to Long Run

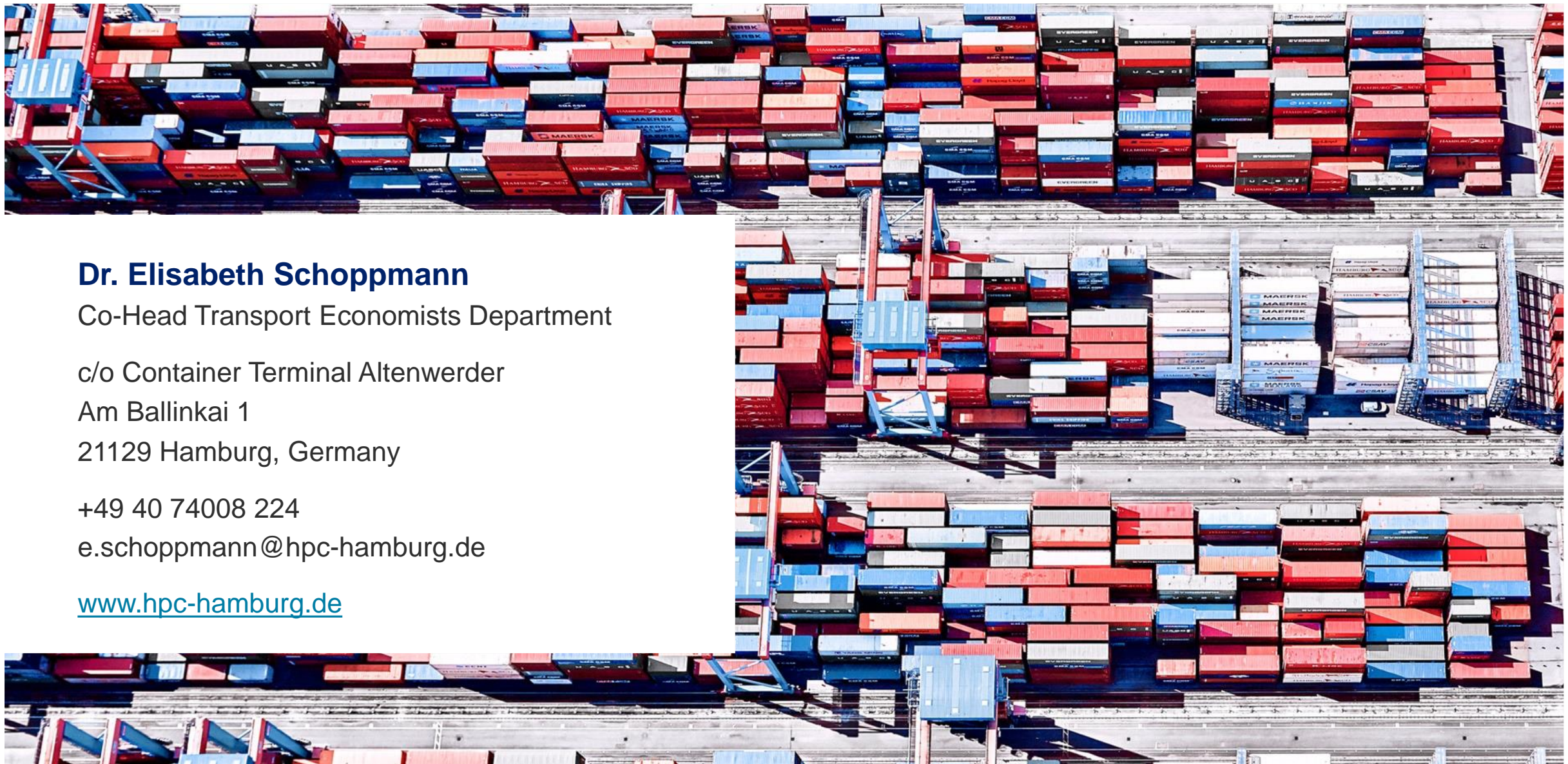
## Increasing Local Cargo Volumes through

- Strengthening of agricultural products exports
- Growing containerisation of conventional cargo (e.g. chemicals, fertilizer, liquids etc.)
- Strong growth of Russian online commerce and increased demand for value added services

## Enlarging Transit Cargo Throughput by

- Taking advantage of the Silk Road Transport Corridors connecting Europe, Central Asia and Far East
- Integrating into the International North-South Transport Corridor moving freight between Europe, Near East and South Asia





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