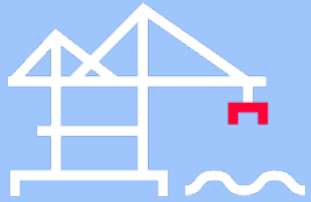


# HHLA International: Improving supply chain resilience in the Middle Corridor

Istanbul | June 2026



# HHLA facts and figures (2025)



7

seaport terminals

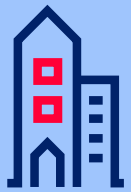


20

railway terminals in the hinterland

74

companies



6.3 million

TEU are handled annually at HHLA facilities.

161

million € EBIT



1,756

million revenue

58.5%

fewer specific CO<sub>2</sub> emissions since 2018



7,269

employees in 12 countries, HHLA Group



~ 2 million

TEU transported yearly by HHLA by rail and road.

# HHLA International is responsible for the management and development of HHLA's international terminals



## Container Terminal Odessa /Ukraine

- Largest container terminal in the Ukraine
- Participation since 2001



## HHLA TK Estonia/Tallinn

- Largest container terminal in Estonia
- Terminal acquired in 2018



## HHLA PLT Italy/Trieste

- New multipurpose terminal in Italy serving the Adriatic
- Majority acquired in January 2021



## Eurobridge Intermodal Terminal and UIC

- Transshipment terminal EU-Ukraine border
- Participation (60%) since 09/2025
- UIC as intermodal operator in Ukraine



## HHLA Project Logistics Georgia/Poti

- Project cargo and container forwarder in Central Asia
- Participation (75%) since 2006



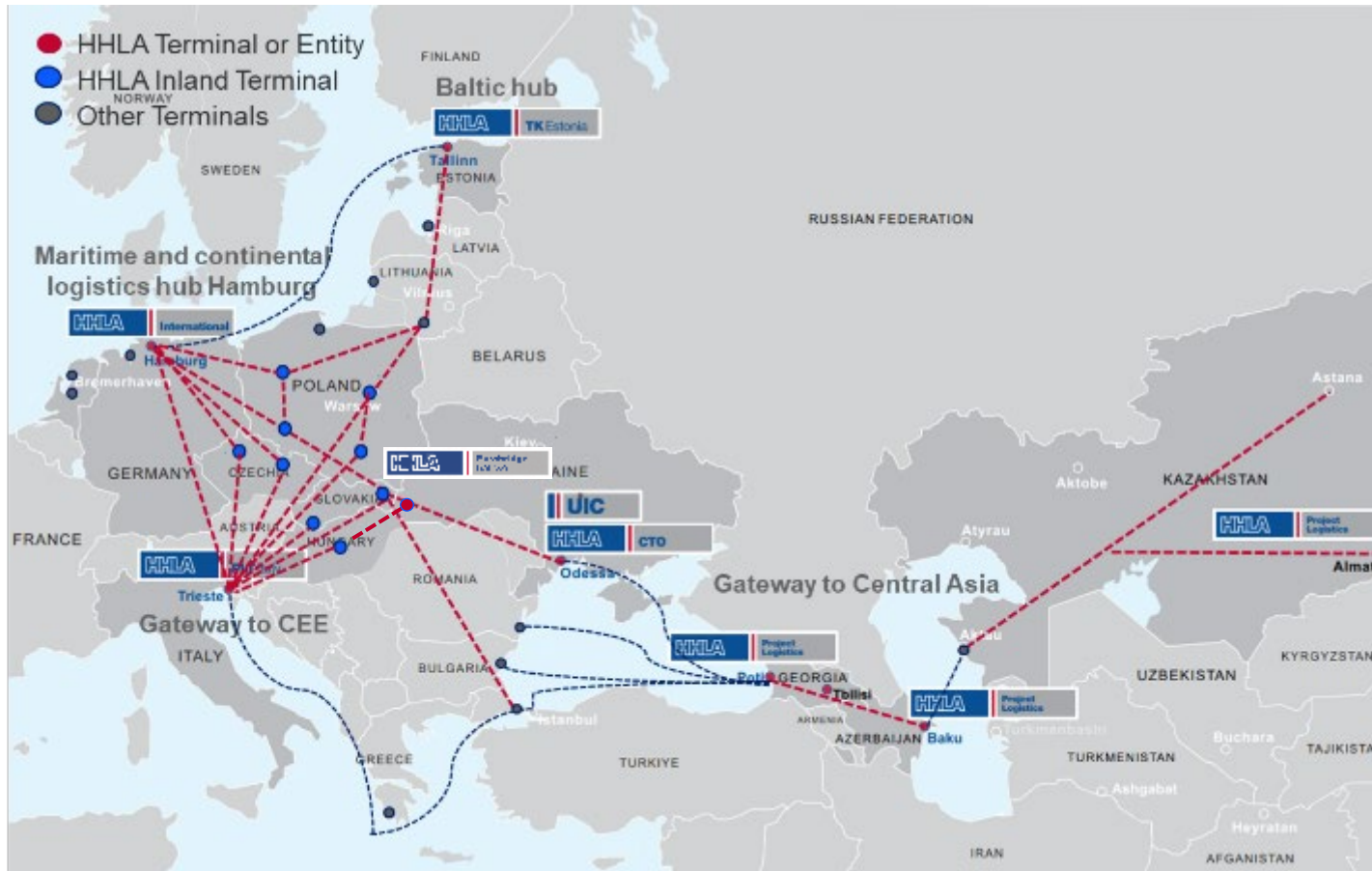
## HHLA PL Kazakhstan, Almaty

- New office of HHLA Project logistics in Kazakhstan
- Founded in 2023

International Terminals

Intermodal and Transport

# Ambition to integrate existing (and new) facilities into HHLA's growing hinterland network between Europe and Central Asia



- Focus on development of inter-linked regional hubs to efficiently serve the hinterland
- Aiming to connect the intermodal links of the different ports to create a network, both for east-west and north south trades
- Ongoing ambition to develop within Europe and Central Asia
- **The Power of Networks**

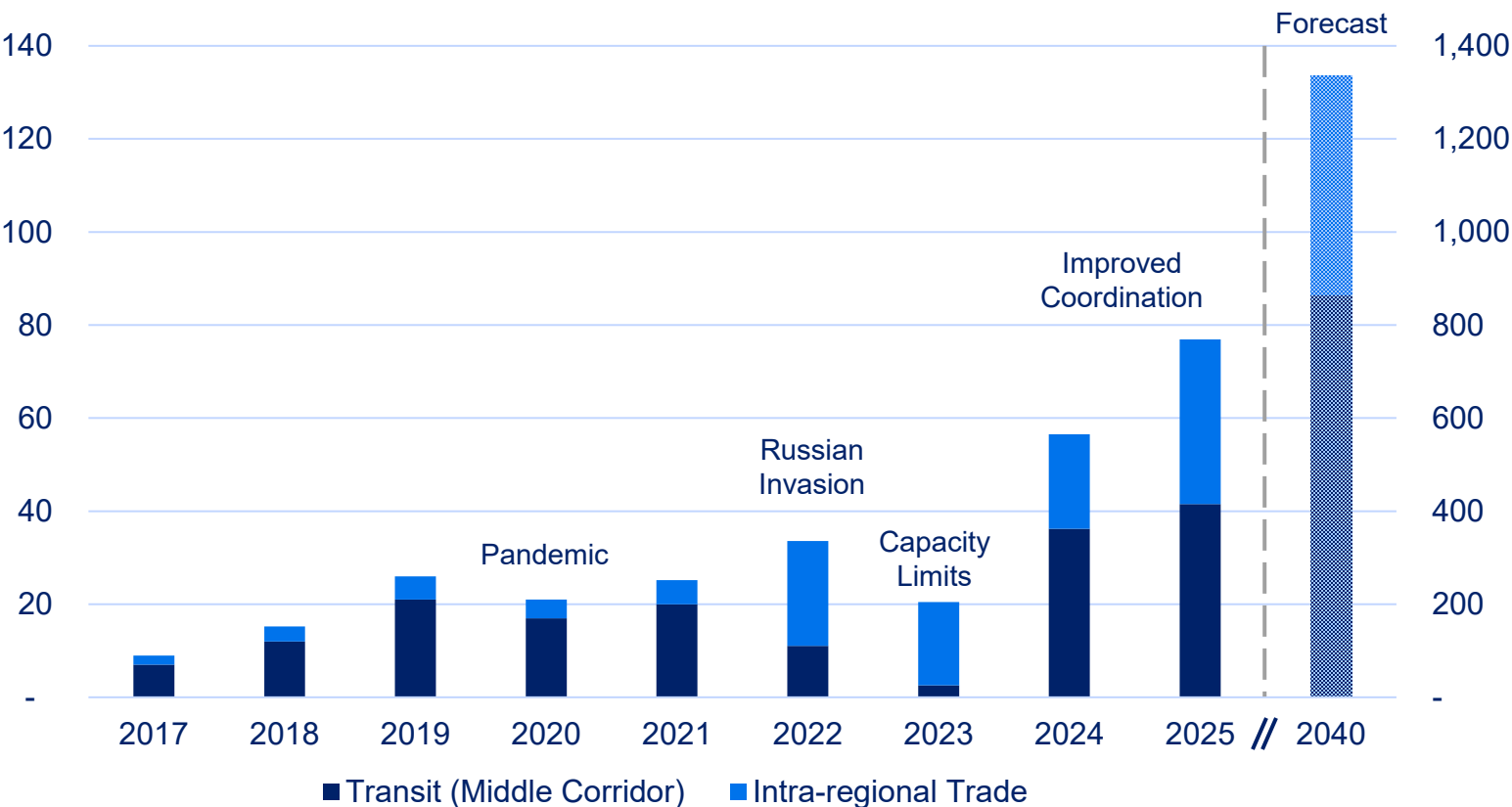
# HHLA Project Logistics is a specialized forwarding company for heavy lift and intermodal transports along the Middle Corridor

- HHLA Project Logistics was established in 2001 in Poti, Georgia
- Offices in Poti, Tbilisi (GE), Baku (AZ) and Almaty/Astana (KZ)
- Offering logistics solutions along the Middle Corridor, with focus on
  - Project cargo and heavy lift transports
  - Intermodal container transports
  - Logistics solutions by sea, air and/or land
- Firsthand experience of advantages and bottlenecks along the Middle Corridor



# HPL is operating in a market with significant growth potential

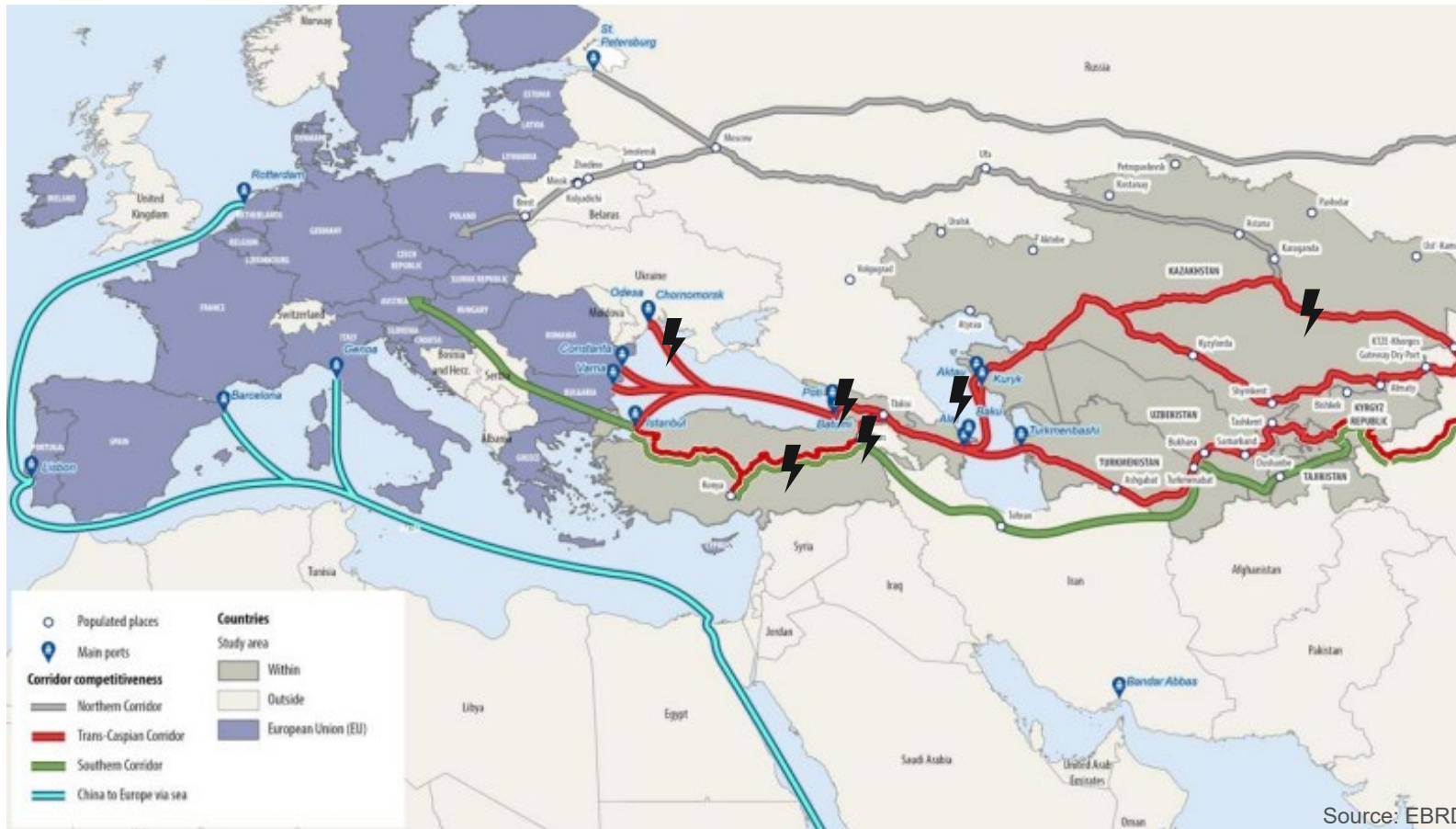
Container Throughput Middle Corridor incl. EBRD Forecast [k TEU]



- The Middle Corridor is both a transit corridor between and China and Europe and important gateway for Central Asian countries.
- This is particularly true as existing corridors through Russia and the Middle East are being affected by sanctions and conflict.
- Studies expect annual corridor potential of up to 850 k TEU plus 470 k TEU regional volumes by 2040.
- Such projections assume that current bottlenecks are eliminated.

Source: Trans-Caspian International Transport Route (2026); EBRD (2022)

# The Middle Corridor improves global and regional resilience but still is constrained by significant bottlenecks



- Major capacity bottlenecks along the Middle Corridor include
  - Port capacity in Black Sea ports
  - Rail infrastructure in Kazakhstan and Türkiye
  - Vessel capacity and operational efficiency in Caspian Sea transportation, incl. weather and climate conditions
  - Limited digitalization in customs/border procedures (esp. Turkmenistan)
- **As HHLA we aim to develop integrated rail solutions between EU and Central Asia via Türkiye making use of our European rail network and regional presence in GE, AZ and KZ**

# Future measures to focus on port, vessel / rail capacity and trade facilitation

## Port and vessel capacity

- Additional port capacity in Georgia required as Poti and Batumi are operating at high utilisation
- Additional vessel capacity required on the Caspian Sea, as lack of vessel capacity creates significant waiting times

## Rail capacity and services

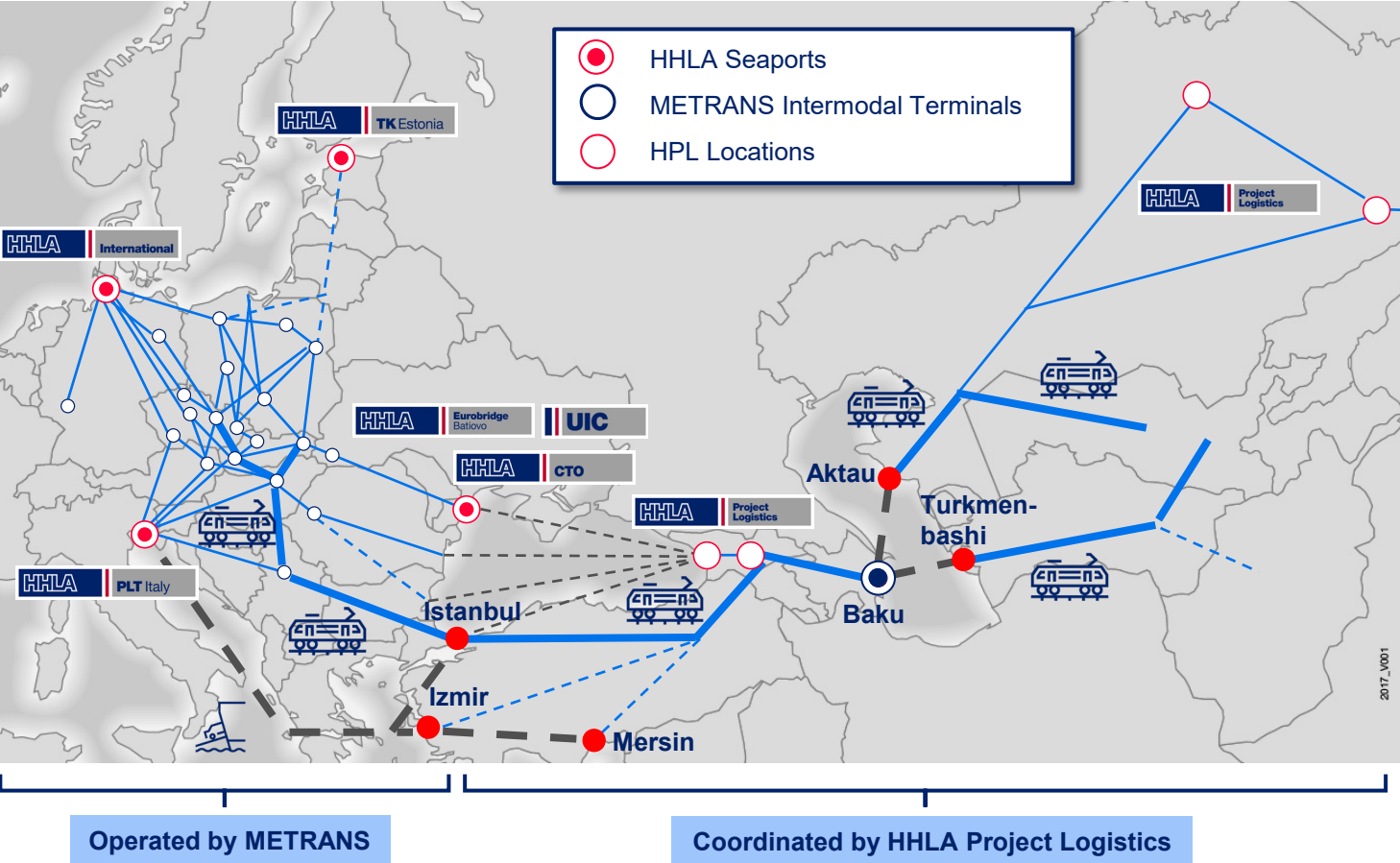
- Expansion of rail capacity of Georgian ports
- Expansion of rail capacity between Georgia and Türkiye
- Provision of scheduled and reliable intermodal rail services along Middle Corridor to attract cargo from truck to train and reduce costs

## Trade facilitation

- Investment in digitization of border and customs processes
- Alignment of regulations across countries
- Corridor-wide coordination of activities
- All of the above essential to improve transit time increase competitiveness and to allow

**Further investments required, but also additional soft measures.**

# Developing the rail corridor between Europe and CIS countries



We aim to develop integrated rail solutions between EU and Central Asia via Türkiye making use of our European rail network and regional presence in GE, AZ and KZ



# HHLA and HIG – Your partner along the Middle Corridor



**Integrated approach to transportation**



**Strong railway network in Central and Eastern Europe**



**Regional presence in Central Asia and Caucasus**



**Development of rail solutions from Europe via Türkiye to Central Asia**



**The Power of Networks**

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