

Luka Koper – Port of Koper

SHORTER > SMARTER > PARTNER



Gateway to the Central Europe and the
Future Vision of the Port of Koper

Brussels, March 2018

Dimitrij Zadel, President of the
Management Board



About the Company

established in

1957

- public limited company listed on the Ljubljana stock exchange
- terminal operator of all 12 specialized terminals in the port => Multipurpose port

maritime
throughput in 2017

23,4

million tons

- container throughput in 2017: 911.528 TEU
- cars throughput: 741.253 units



1,100

employees in the Luka Koper Group

- **Concession** granted for the management of the port area until 2043
=> invests in infrastructure, superstructure and equipment in the port area
- **National spatial plan** adopted in 2011

1st Container terminal in ADRIATIC

1st Car terminal in MEDITERRANEAN

- ESPO, FEPORT, NAPA, SBRA
- Green highlights: EMAS, ISO 14001, „No waste, just resources“, 24 hours on-line monitoring

Evolution through decades



Port in numbers today:

- 280 ha of port area
- 26 berths
- 35 km of rails
- 3,4 km of operative quays

On strategic crossroads

- on the crossroad of Mediterranean corridor and Baltic-Adriatic corridor,
- recognized as a core EU port (within TEN-T regulations).

Mediterranean corridor

Baltic-Adriatic corridor

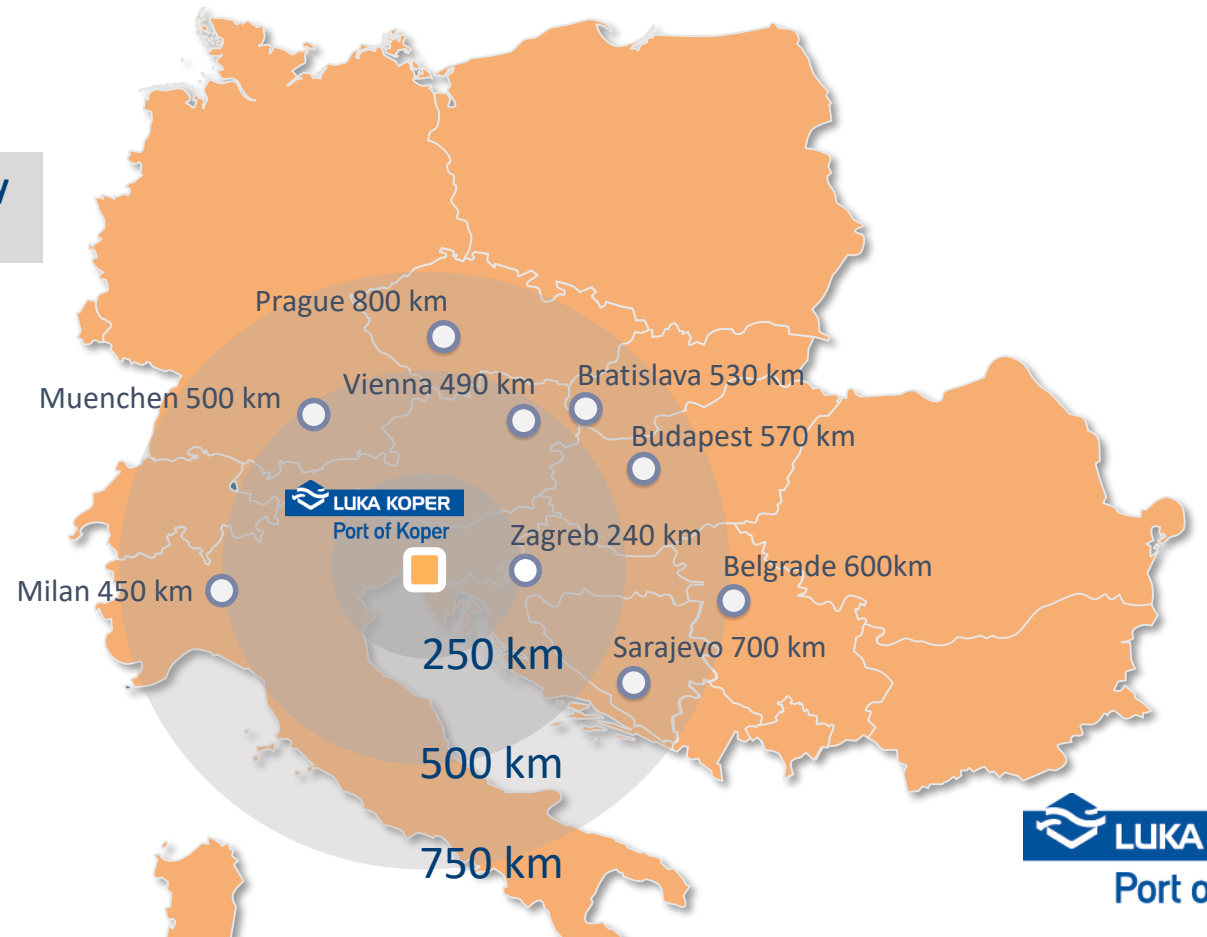
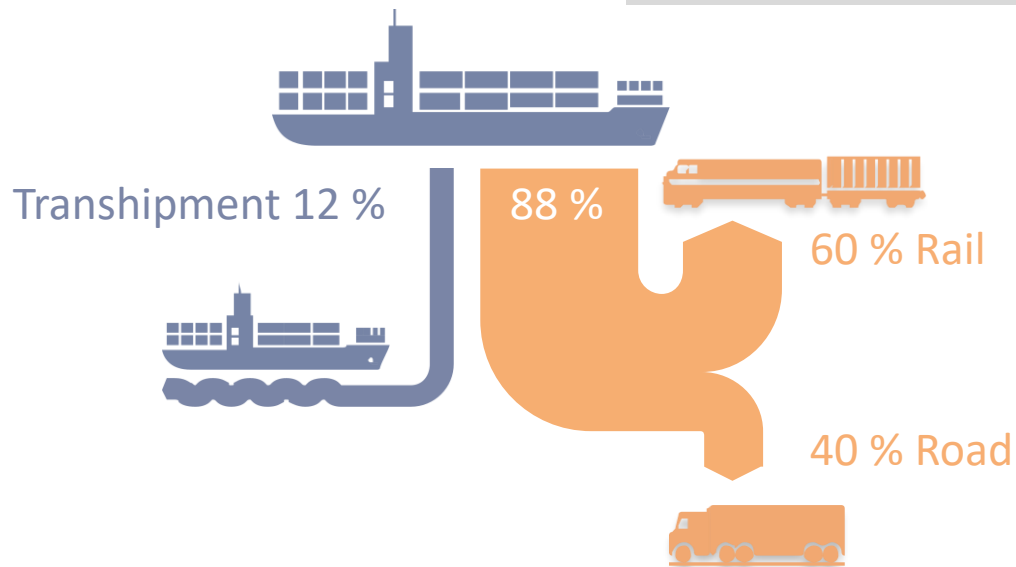


Hinterland rail & road connections

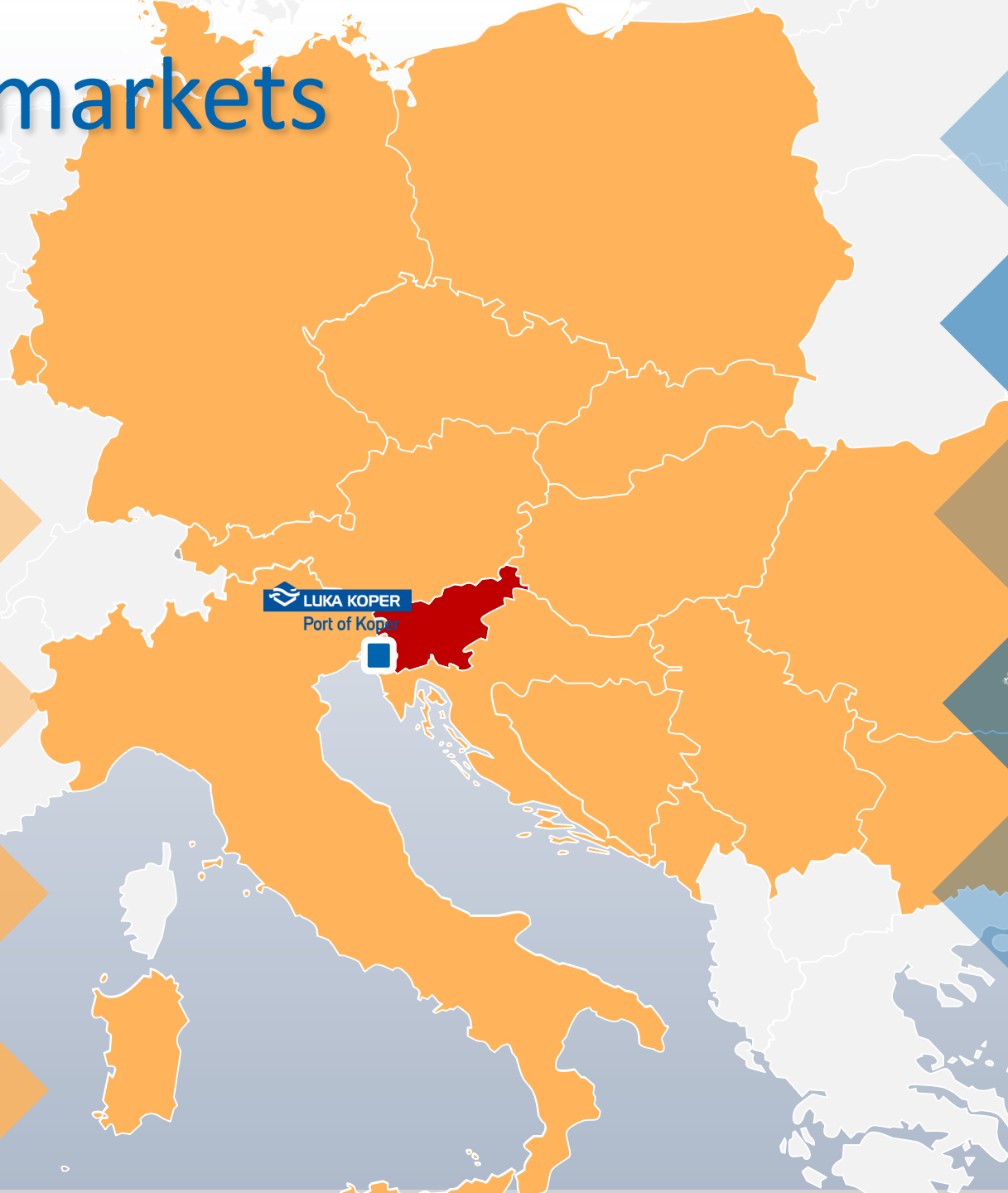
- excellent railway connections to hinterland markets,
- modern highway network
- business centres of surrounding hinterland markets can be reached from the Port of Koper by **road in less than 1 day** and by train **in less than 2 days**.

MODAL SPLIT

Average 2017: **65 cargo trains / day**
=> over **23 thousand trains / year**



Hinterland markets



Poland
Containers, Cars, General cargo

Czechia
Containers, Cars, General cargo

Germany
Containers, Cars

Italy
Coal, General cargo

Croatia, Bosnia & Herzegovina, Serbia
Containers, cars, general cargo

Austria:
Absolute market leader - more than 6 M tonnes of various goods handled every year

Slovakia:
Container market leader with 60 – 70 % share

Hungary:
Container market leader with 60 – 70 % share of Hungarian container market + cars, electronics, agro/food/fodder

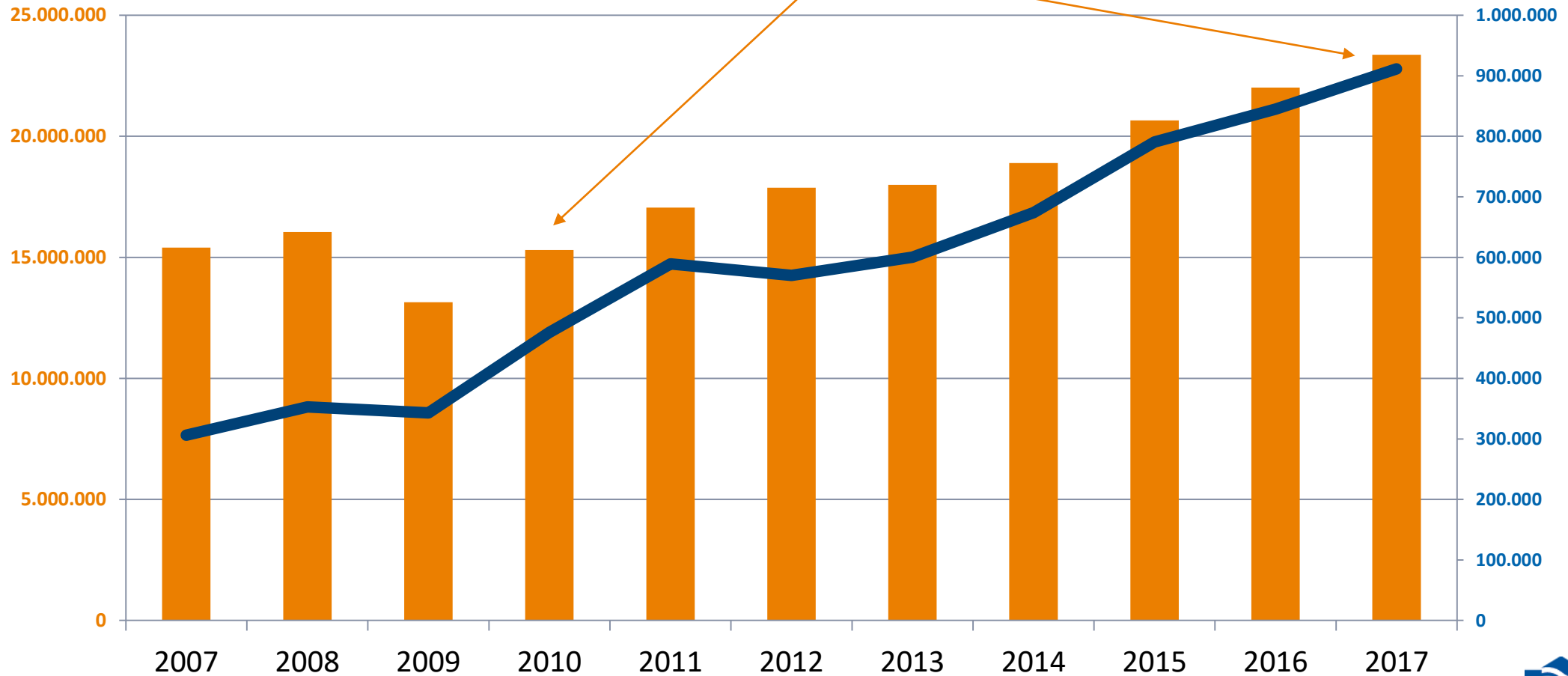
Slovenia:
Domestic port

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Maritime throughput history

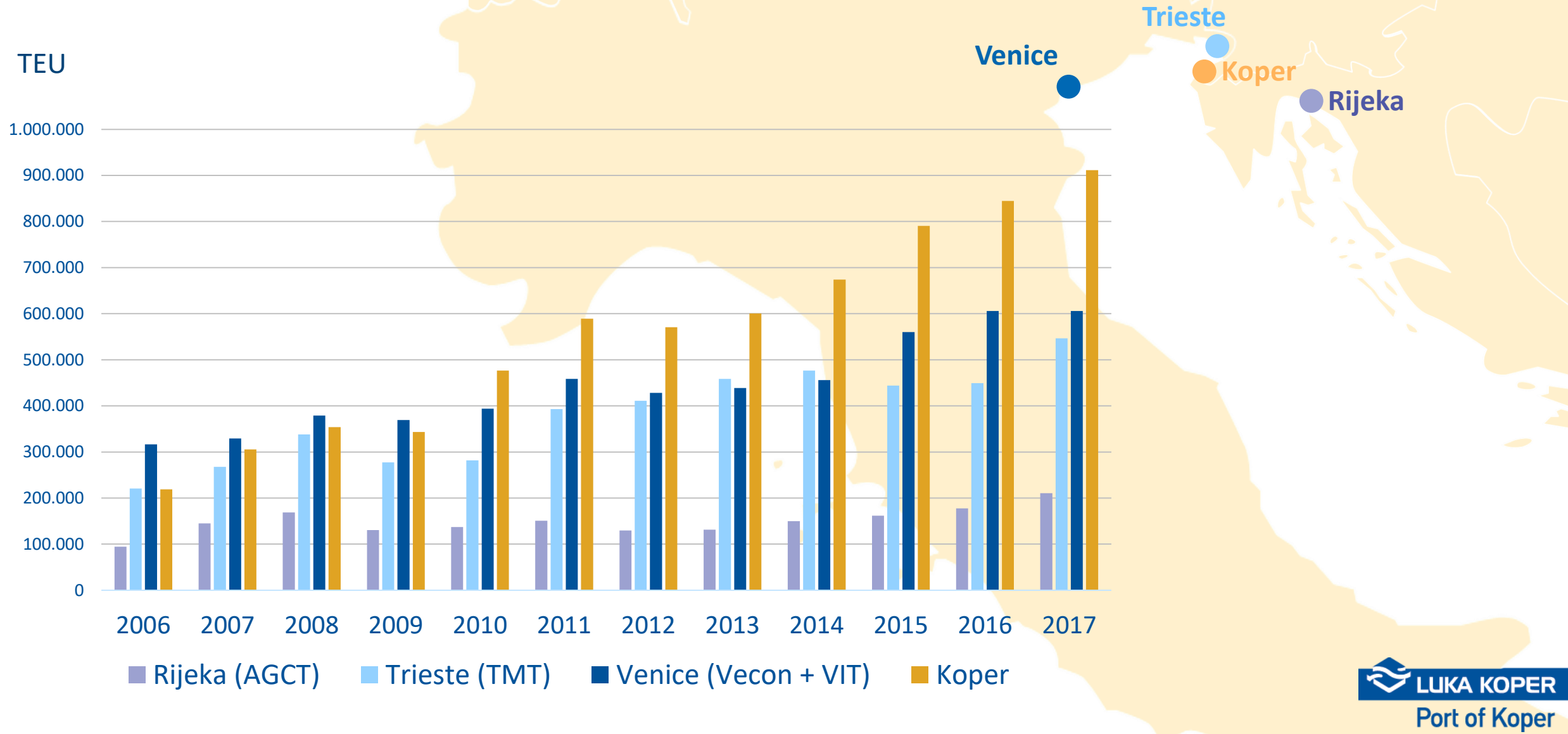
ton
total maritime throughput

TEU
only



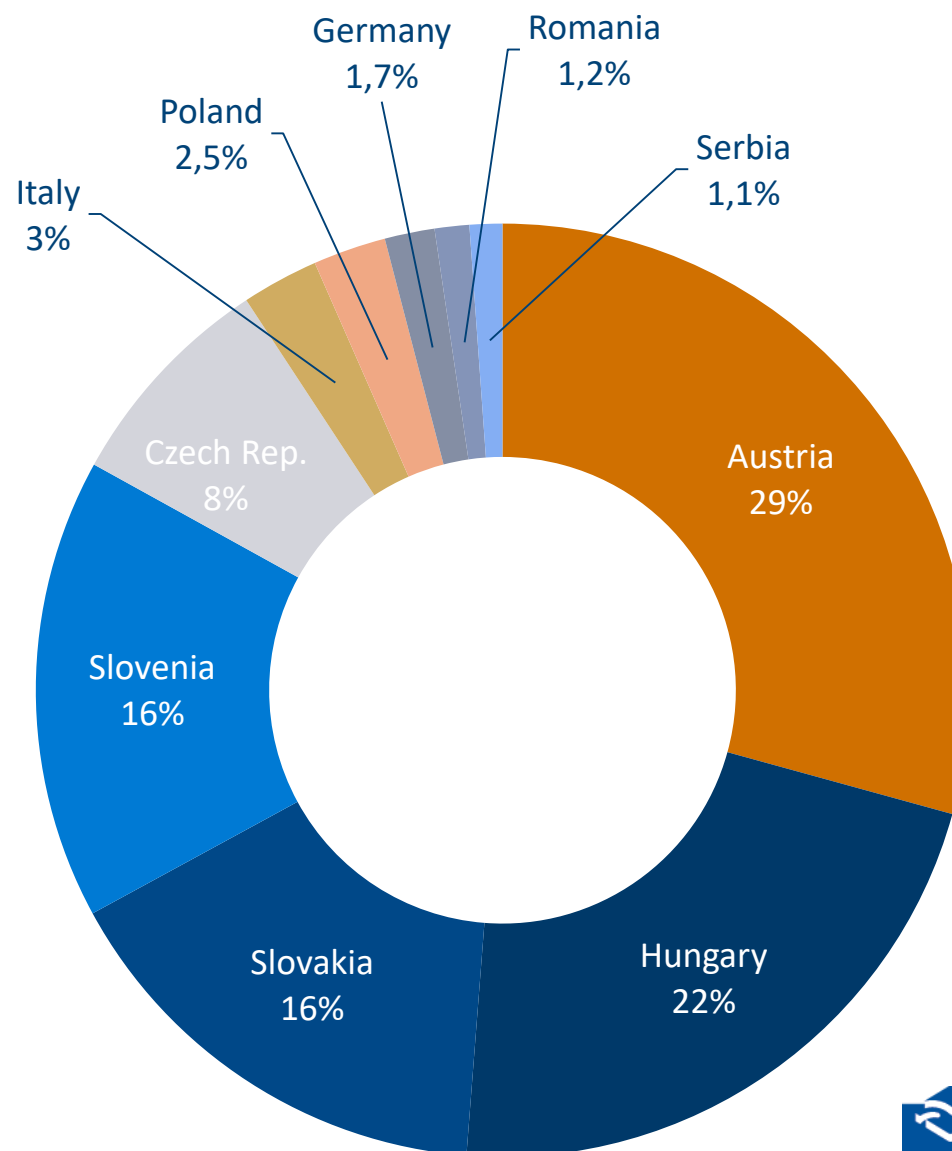
More than double

Leading container terminal in North Adriatic



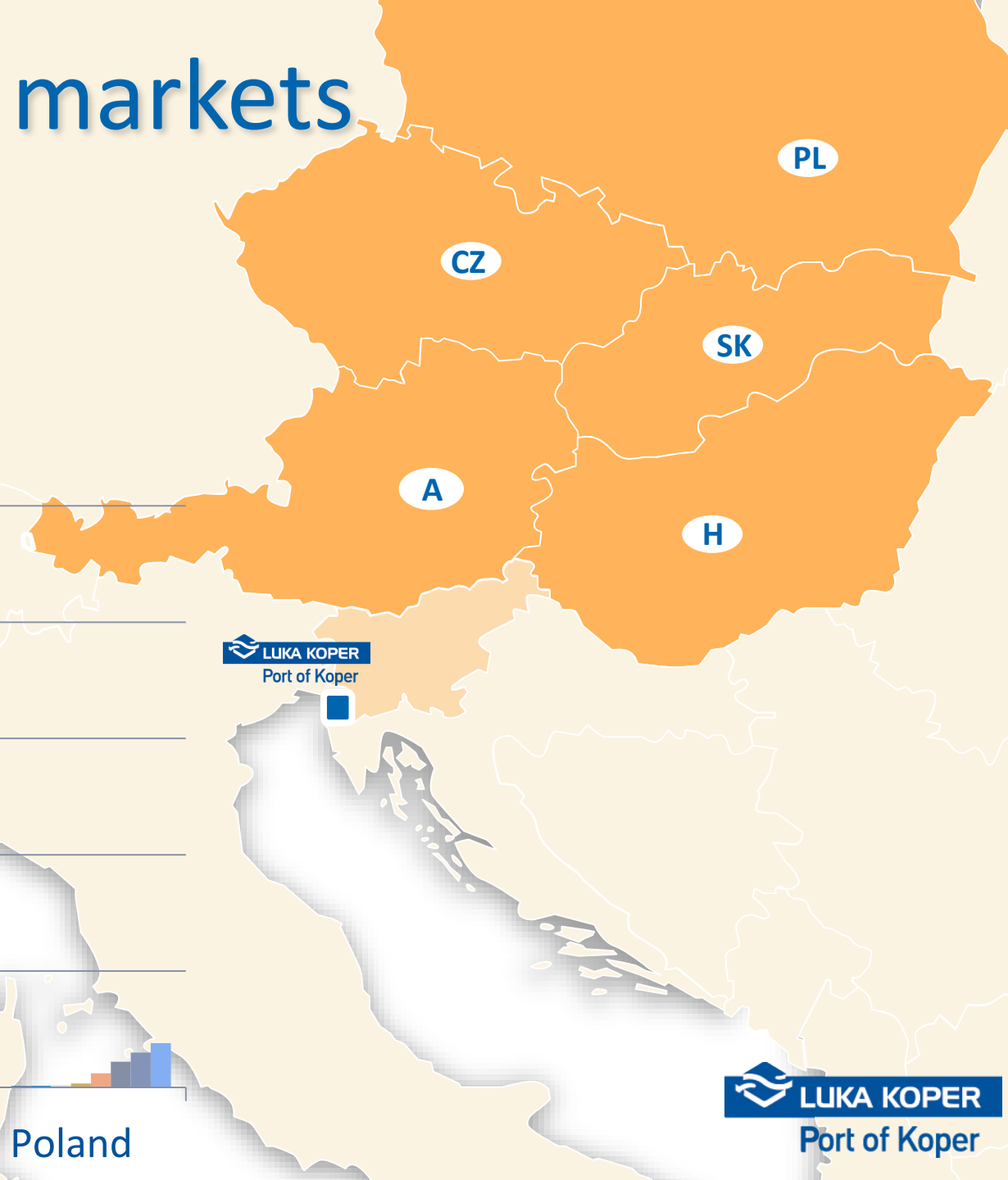
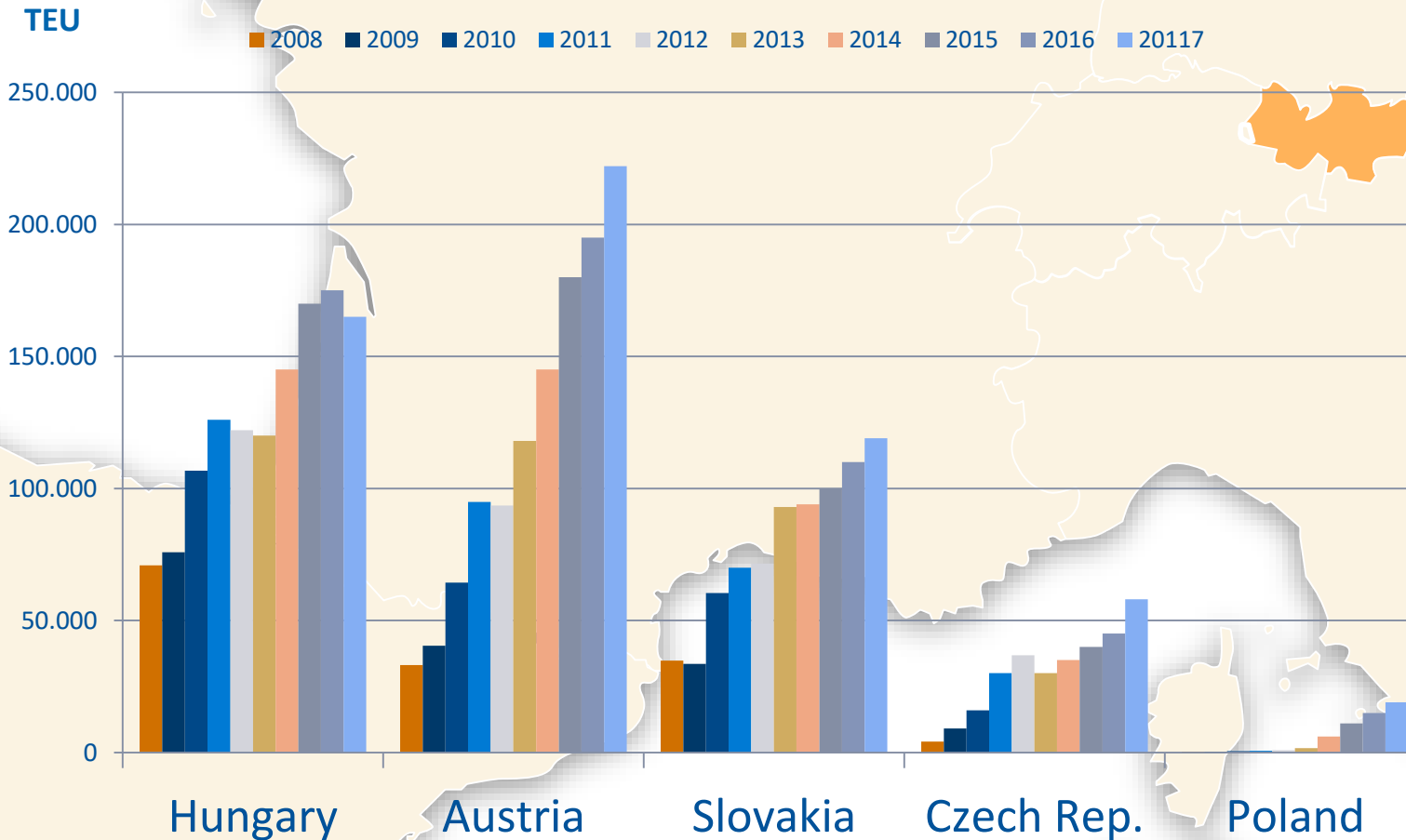
Hinterland container markets

Year 2017 (estimated percentage of full/stuf+strip containers throughput)



Top 5 Foreign container markets

Full TEUs + stuffing + stripping in Koper, estimated volumes



Developing efficient and competitive container railway services

Block Container trains:



12-13 arrivals-departures /daily

80-90 trains/week

NEW CAPACITY: 125 trains/week

Container terminal modal split



Transshipment 1%

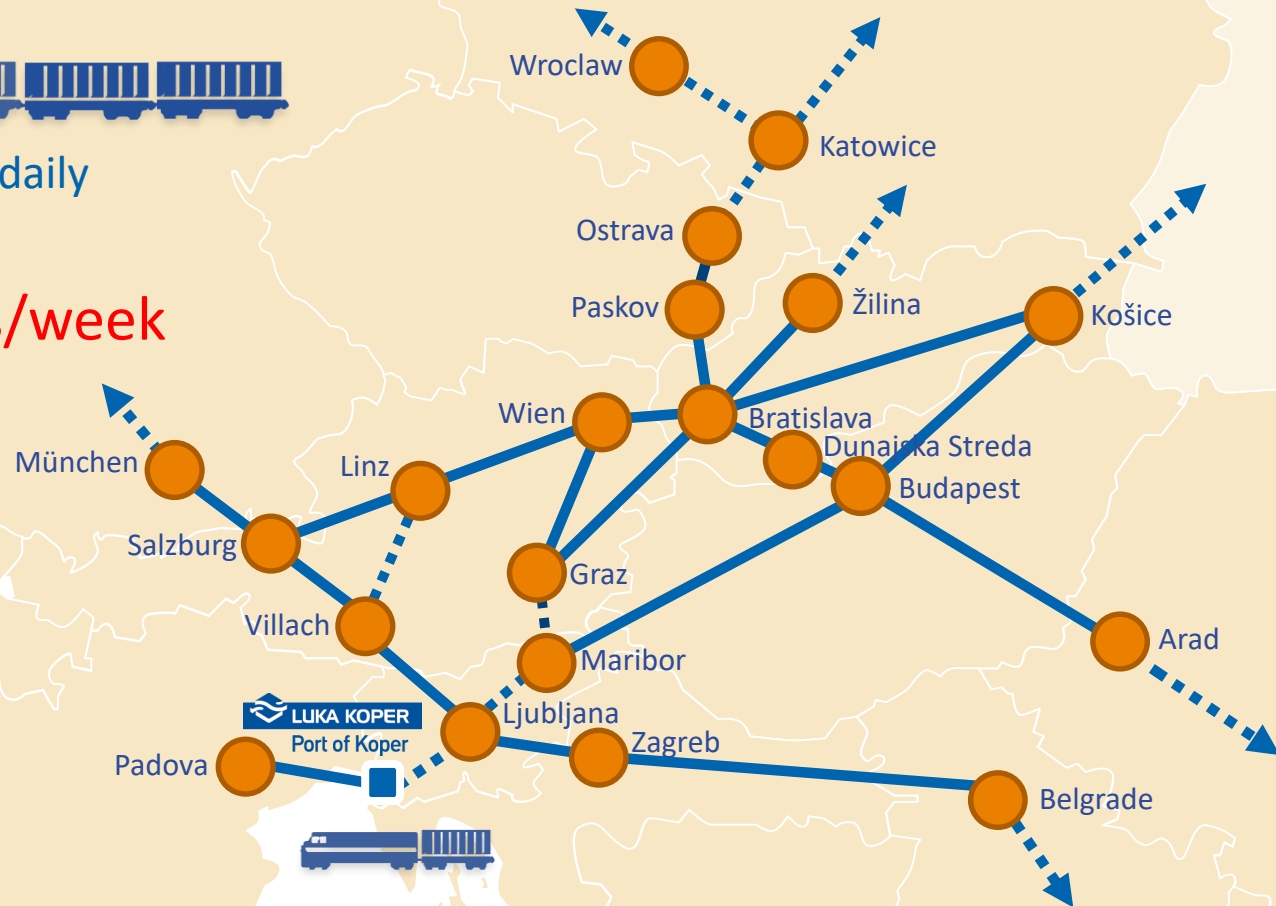
99 %



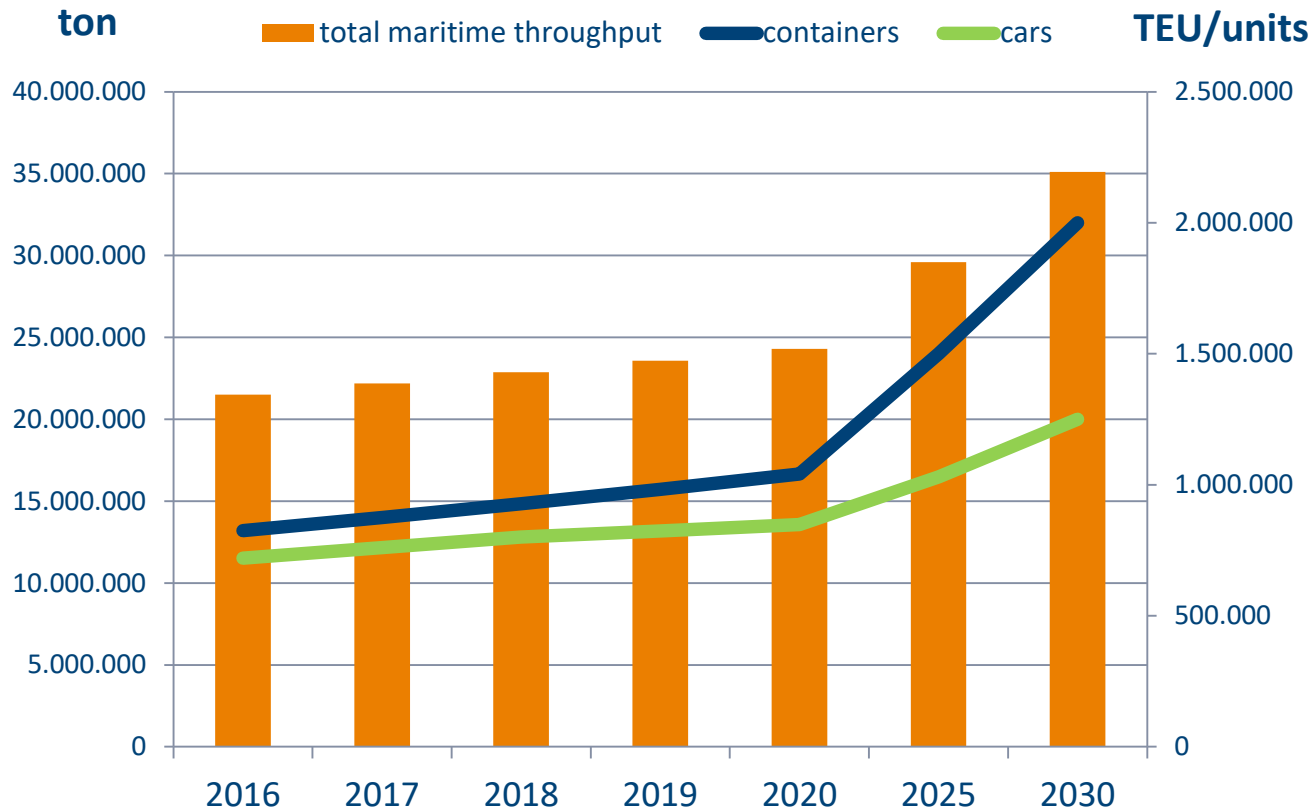
53 % Rail



47 % Road



Throughput estimations



- Multipurpose port (all cargo groups)
- Expected accelerated growth of **container traffics** / key investments!
- Important position on **car segment**
- Regular supply of **strategic fuels**
- New opportunities for **general cargo** related to containers and alternative fuels

Throughput	2017	Near Future 2020	Development: 2030
Total (tonnes)	23,366,959	> 25 mln	> 35 mln
Containers TEU)	911,528	> 1.000.000	> 2.000.000
Vehicles (units)	741,253	> 800.000	> 1.200.000

Long term port development



INVESTMENTS until 2020

INVESTMENTS until 2030

2016 – 2020:
more than 300 mln EUR

2021 – 2030:
additional 400 mln EUR


Main mid-term investments

Key investment projects CEF cofinanced:


- NAPA4CORE + NAPADRAG
- CarEsmatic + **STAR2MOS**

Motorways of the Sea



CONTAINER TERMINAL – 235 M € 



 CAR TERMINAL – 43,6 M €



LIQUID BULK TERMINAL – 13,9 M € 



MULTIPURPOSE WAREHOUSE & BERTHS – 42 M €

Combining projects for containers and multimodality

- Market potential: growing volumes for Central and East European markets (2 mio TEU/year till 2030) / using Baltic-Adriatic and Mediterranean multimodal TEN-T corridor

Projects to increase capacities (quick wins / mid-term / long-term):

- Reorganization of processes
- Improved ICT support
- Energy efficiency
- Dredging basin I
- Extension of Pier I and quayside reconstruction
- Terminal concentration in its immediate hinterland
- Additional equipment



Combining EU funding and financial instruments:

- MOS4MOS (TEN-T) => ICT (several prototypes)
- ITS Adriatic Multiport Gateway (TEN-T) => ICT (EDIFACT)
- GreenCranes (TEN-T) => energy consumption measurement & actions
- B2MOS (TEN-T) => ICT (+ ANNA – Slovenian Maritime Administration - SW)
- NAPADRAG (TEN-T) => dredging Basin I – 15 m (works)
- NAPAPROG (TEN-T) => project documentation for extension Pier I (studies)
- NAPASTUDIES (TEN-T) => project documentation for railway tracks on the ter and navigability study (studies)
- NAPA4CORE (CEF) => port infrastructure up-grades, railway and last mile connection, Pier I extension (works)
- FFC (CEF) => small scale supporting infrastructure and equipment
- RCMS (H2020) => possibility for a new technology and terminal facilities concept
- EIB loans => dredging port accesses and berth 7C
- Republic of Slovenia – Maritime Administration (Cohesion fund) => dredging accessing channel to Basin I – 15 m (works)



Active in EU projects

2007 – 2013:
32 + 2 projects

2014 – 2016:
14 new projects



New projects' priorities

- **Infrastructure:** New capacities for strategic cargo groups: containers and cars + Improved port's accessibility and connectivity, overcoming bottlenecks
- **Smart Contents:** Environment, energy efficiency, ICT, innovative technologies, security, intermodality, green logistics, sustainability, wider regional development, knowledge ...

2014 – 2020

=> No cohesion funding; **14 new projects;**

approx. **11,6 mio € funds approved** (for activities of 45,2 mio €) / 6 different programs

CEF Blending?	CEF	H2020	Central Europe	Structural funds	SLO-IT	ADRION
						ADRIPASS
						SUPAIR
						ISTEN
						
						



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Thank you for your attention!