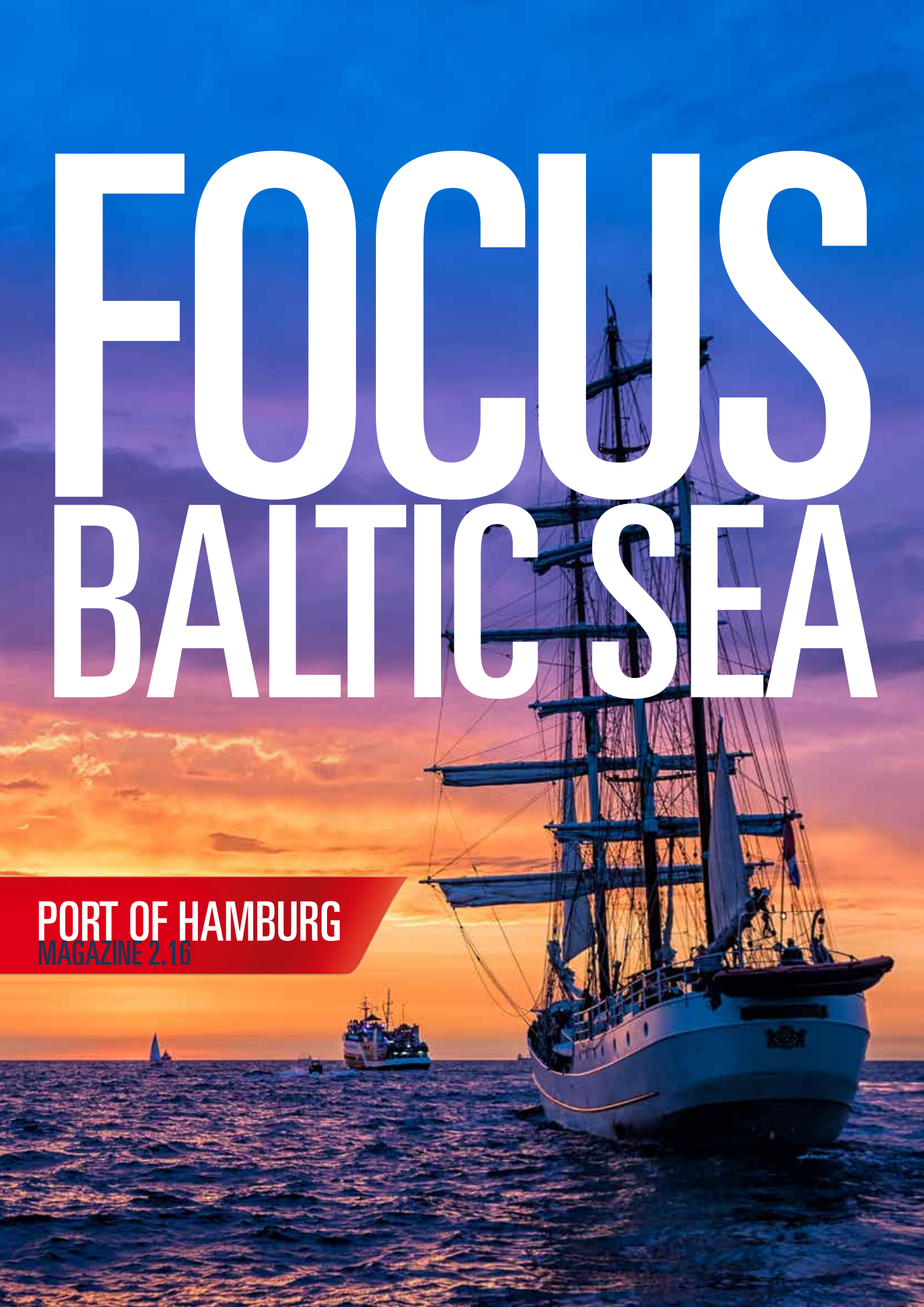


FOCUS BALTIC SEA

A large three-masted sailing ship, likely a schooner, is the central focus of the image. It is positioned in the lower right quadrant, sailing towards the viewer. The ship has a white hull and dark masts with complex rigging. The background is a dramatic sunset or sunrise over the sea, with a sky transitioning from deep blue at the top to vibrant orange and yellow near the horizon. The water is dark with some whitecaps. In the distance, to the left of the main ship, another smaller vessel is visible on the horizon. The overall mood is serene yet powerful.

PORT OF HAMBURG
MAGAZINE 2.16

Dear Readers,



Historically in the time of the Hanseatic League Hamburg was already closely linked to the Baltic Region and functioned as an important transshipment and trading location. Today the Baltic region is second after China as the largest market region for the Port of Hamburg in container traffic and has the potential to develop into one of the most innovative and competitive regions in Europe. The global transport and logistics market has changed dramatically in recent years on economic, ecological and political levels. The Baltic Region too, has been shaped by changes and there is a lot of interesting

reading in this issue of Port of Hamburg Magazine.

In an interview, Professor Kurt Bodewig, a former federal minister talks about building and maintaining the important transport network for the Baltic Region and the TEN Corridor. Professor Dr. Burkhard Lemper, Director of the Institute for Shipping Economics and Logistics at Bremen University of Applied Sciences looks into important trends in the Baltic transport market. The report on logistics processes during ships handling in port looks at the question of optimal cargo planning for Baltic Sea ferries. Naturally, you will find articles on current developments in the infrastructure and a small geographical port round trip will look at projects and trends in the Baltic ports.

I hope you enjoy reading our Baltic Sea Region issue of Port of Hamburg magazine.

Marina Basso Michael

Director, Market Development Baltic Sea Region / Eastern Europe



**HISTORICALLY IN THE TIME OF THE HANSEATIC
LEAGUE HAMBURG WAS ALREADY CLOSELY
LINKED TO THE BALTIC REGION**



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Significant trends on the Baltic transport market

For the ports in the North Range, and especially Hamburg, the Baltic region is one of their most important feeder markets. In container traffic, particularly, the high proportion transshipment means that the economic and trade development of states in the Baltic makes an impact on cargo handling not only in Hamburg, but also in Bremerhaven and Wilhelmshaven.

In recent years, economic development in Russia, one of the largest destination markets for containers from overseas in the Baltic, has been distinctly below the norm. Especially in 2015, some of the other states on the Baltic had to accept reductions in GDP and in international trade. The latest issue of the World Economic Outlook issued by the International Monetary Fund (IMF) in April 2016 puts the downturn of 2015 GDP in Russia at no less than 3.7 percent. A further slide of around 1.9 percent is ex-

pected for 2016, before the prospects become somewhat brighter from 2017 with economic growth of around one per percent per annum.

After three years of economic downturn, in 2015 Finland returned to slight growth and should maintain this trend in the next few years too, according to the IMF. The Baltic States on average reported slight growth in economic output in 2015, yet below the line this remained somewhat below two percent.

From 2016, an economic revival of around 3.0 to 3.5 percent annually is forecast.

From 2014, and especially in 2015, the development of Russia's foreign trade was determined by the sanctions imposed by many Western states, but also by the import restrictions as a reaction to these. In 2014, imports of goods were already almost four percent lower. A collapse of over 28 percent then followed in 2015. The IMF sees a further downturn of more than 11 percent occurring this year, before a gradual recovery from 2017. Largely consisting of oil and gas, Russian exports stagnated in 2015.

This more sluggish development in the economy generally and in foreign trade was also reflected in container traffic – both at global level and with the focus on NW and Northern Europe. ISL figures show that container handling slowed down continuously worldwide in the course of 2015. Expectations, from Clarkson Research for example, were corrected downwards almost monthly. Whereas the assumption at the beginning of 2015 for the year to come had been for growth of 6.7 percent, by the end of the year this had deteriorated to 2.5 percent.



© ISL / Martin Bockacker

Professor Dr Burkhard Lemper (Director of ISL - Institute of Shipping Economics and Logistics, and Professor at the University of Applied Science Bremen)

Looking back at last year, ISL estimates that no more than a maximum 0.5 percent more containers were handled and transported than in the previous

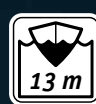
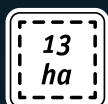
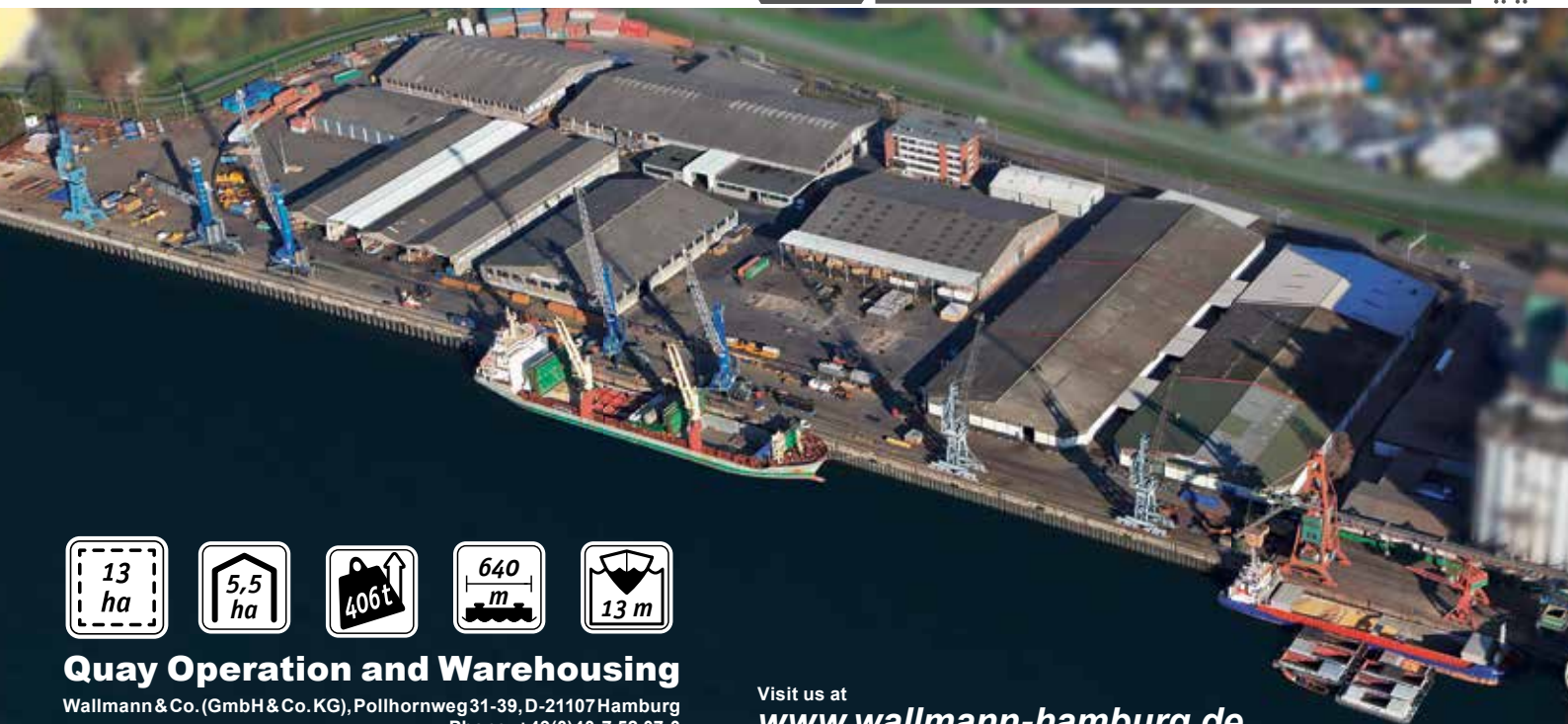
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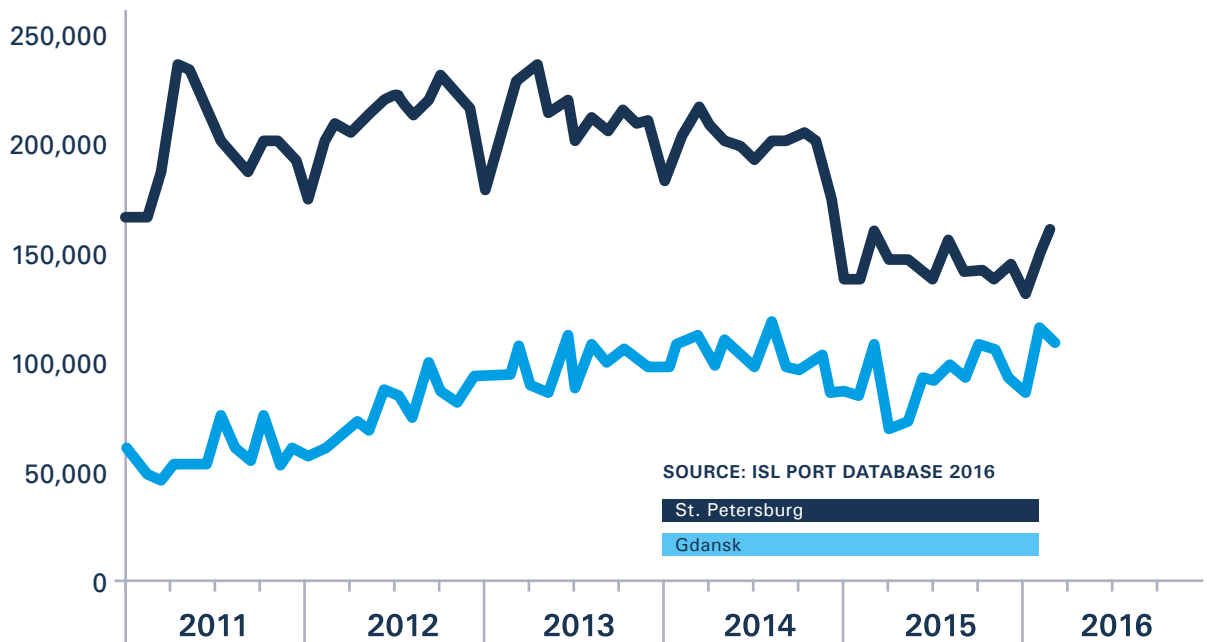
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CONTAINER THROUGHPUT TREND IN ST PETERSBURG AND GDANSK SINCE EARLY 2011

MONTHLY CONTAINER THROUGHPUT (TEU)



year. Other than in earlier years, this weak trend was even below growth rates for global production. It was also evident on average in the ports of the North Range, which lost an overall 1.6 percent. Hamburg, especially, but also Bremerhaven were hit by weakness in the China trades, on the one hand, and on the other by the collapse on the Baltic trade routes, and especially transshipment for Russia.

The diagram shows the collapse in throughput volumes in St. Petersburg by around 30 percent in winter 2014/2015, following the downturn of more than 5 percent already reported for the previous year. Nor was there any recovery here in 2015. Gdansk also lost ground in 2015, but thanks to the stabilizing effect of Polish hinterland transport services and slight market share gains on transshipment business, this was proportionately lower. In the first months of 2016 a positive trend compared to the previous year was apparent at both St. Petersburg and in Gdansk, as well as other Baltic ports, but admittedly from a much lower base level.

By contrast, the dreaded effect of a transfer of seaborne services to the direct land route as a result of the implementation of the SECA rules on the use of almost sulphur-free fuel, for example through the relevant exhaust gas purification, has almost completely failed to occur. The collapse of crude oil and bunker prices from autumn 2014 meant that as the

SECA rules came into force from January 2015, the price of Marine Diesel (MDO) reached the level that had previously applied to much more economical heavy oil (HFO). Anticipated price increases and switch to rail/trucking therefore largely failed to materialize.

The prospects for further development of container services into or out of the Baltic are modestly positive. For the next few years, the IMF foresees a stabilization of economic growth and accordingly of foreign trade relations, so that demand for freight transshipment services can also be expected to rise. No drastic rise in the price of oil and hence of bunkers is anticipated in the short term, so that any significant transfer to rail/trucking is for the moment at least on hold. With bunker prices low, one has to reckon that competition for Hamburg and Bremerhaven from direct deep-sea services into the Baltic, to Gdansk for instance, will persist for the moment. ■

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Kiel Canal (NOK)

- Total length: 98.26 kilometres
- Breadth of water plane: Western section: 162 metres : Eastern section: 102.5 metres
- Breadth of canal bottom: Western section: 90 metres / Eastern section: 44 metres
- Ship passages in 2014: 32,589
- Duration of a canal passage: approx. 8 hours
- Annual cargo volume handled: around 100 million tons

The Kiel Canal – the shortest link with the Baltic region

Interview with Jens Broder Knudsen, Chairman of the Kiel Canal Initiative and Managing Partner of Sartori & Berger

Mr Knudsen, you are Chairman of the Kiel Canal Initiative and in your capacity as Managing Partner of Sartori & Berger you are involved every day in what's happening on the Kiel Canal. Opened in 1895, with around 30,000 ship transits per year the canal is the world's busiest artificial waterway, but in several respects no longer sufficiently capable of meeting the requirements of either present or future traffic. In recent years the top-

ic of waiting delays caused by lock downtimes has far too frequently posed great problems for the shipping and industrial companies affected. With the Kiel Canal Initiative, the mouthpiece for canal customers and service providers, you are championing the modernization and expansion of the canal. Has the traffic situation on the Kiel Canal improved and are there any positive signals on future development?

The scene is set. Currently handling more than 30,000 ship passages and cargoes totalling almost 100 million tons per year, by 2030 the Kiel Canal that is to be prepared for the future by a comprehensive modernization program. Essential elements of this have meanwhile been set in motion.

Could you give us some examples?

One essential project is the construction of a fifth lock chamber in Brunsbüttel, another being the adaptation of the narrow Eastern section near Kiel, with its many bends, for which financing is now assured. The new replacement for the 'Small lock' in Kiel-Holtenau and modernization of the 'Large lock' there are already at the planning stage.

How were you able to influence this with the Kiel Canal Initiative?

With dogged perseverance and many discussions with those responsible for the canal, the Kiel Canal Initiative that we set up in 2012 has brought immense commitment to championing the overhaul and expansion projected for the canal. We have also been able to become closely involved in the planning processes.

We built up mutual trust and understanding for the concerns of different parties from business, the public sector and politics. That has paid off. In intense dialogue with various experts in their fields, we worked out a Master Plan for the modernization of the Canal, first published at the end of 2014. This brought together existing plans and made these transparent for the public. In mid-April this year the Kiel Canal Initiative presented the first update of its Master Plan, also indicating which measures were threatened with delays. Such timely briefings enable companies and service providers on the Kiel Canal to prepare in good time and give them greater planning certainty.

Which construction delays does evaluation of your April update see as likely for the canal?

At the moment, modification of the Eastern section and the building of a new replacement for the 'Small lock' in Kiel are affected. In our view, the reason for the delay with the Eastern section is inadequate staff cover in the Federal Waterways and Shipping Administration. In particular, the agency lacks engineers and planners for managing complex planning and tendering procedures. This state of affairs is highly regrettable, since financing is assured for the construction work, yet lack of staff then makes timely planning and building impossible. Action is needed there.

So are you satisfied with the new Federal Transport Infrastructure Plan 2030 that is now available as a draft bill after another considerable delay?

The new Federal Transport Infrastructure Plan 2030 certainly contains some statements that are positive for us in the North, and especially for the Kiel Canal. The deepening of the entire Canal has found a place there as a priority need among what are known as 'new initiatives'. Financially, deepening of the entire canal is meanwhile therefore within reach. We depend on an effectively upgraded and efficient canal so that apart from German foreign trade, goods from the dynamically growing Baltic region encounter no problems in using this short, rapid canal route.

With around 120 feeder services per week through the Kiel Canal, the Port of Hamburg also benefits by being linked with the Baltic region by the shortest route.

With its dense network of feeder and liner services, Hamburg is the westernmost main port for the states in the Baltic region and to a remarkable extent assumes the function of a hub for their Baltic services. Given that some container services are already running directly into the Baltic, will



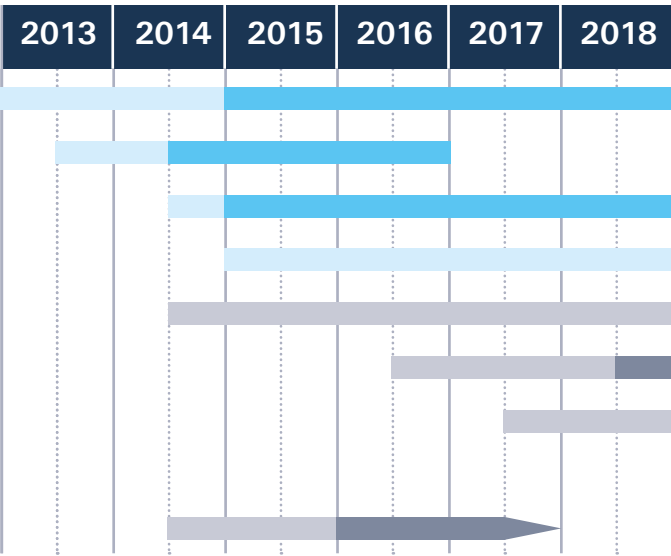
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Jens Broder Knudsen,
Chairman of the Kiel
Canal Initiative and
Managing Partner of
Sartori & Berger.

KIEL CANAL MASTER PLAN 2013 – 2030

PROJECTS

- Construction of fifth lock chamber in Brunsbüttel
- Construction of drainage pipe system in Kiel-Holt.
- Adaptation narrow Eastern section near Kiel
- Replacement for the bridge in Levensau
- Replacement for the ‚Small Lock‘ in Kiel-Holt.
- Modernization of the ‚Large Lock‘ in Kiel-Holt.
- Modernization of the ‚Large Lock‘ in Brunsbüttel
- Deepening of the entire canal
- Additional staff (Planners, Ing.)



FINANCING/IMPLEMENTATION ASSURED

- Preparation phase
- Implementation phase

this geographical advantage of the canal's become less significant?

Even if some direct calls are being made in isolated cases, and even with bunker rates low, the mass of all containers will continue to be transported by feeder. One advantage of the smaller feeder vessels that can serve a large number of ports on the Baltic to schedule, even with lower cargo volumes being handled, is their collection and distribution function. For cost reasons, large ships can only include a minimum number of ports of call in their schedules, i.e. those handling larger cargo volumes. And then the Kiel Canal offers a great advantage on routing. Between Hamburg and Gdansk, feeder vessels save more than half the distance by taking the short cut through the canal, and not opting for the significantly longer route to the Baltic around Skagen in Northern Denmark. The shorter route through the canal also contributes substantially to reducing pollutant emissions.

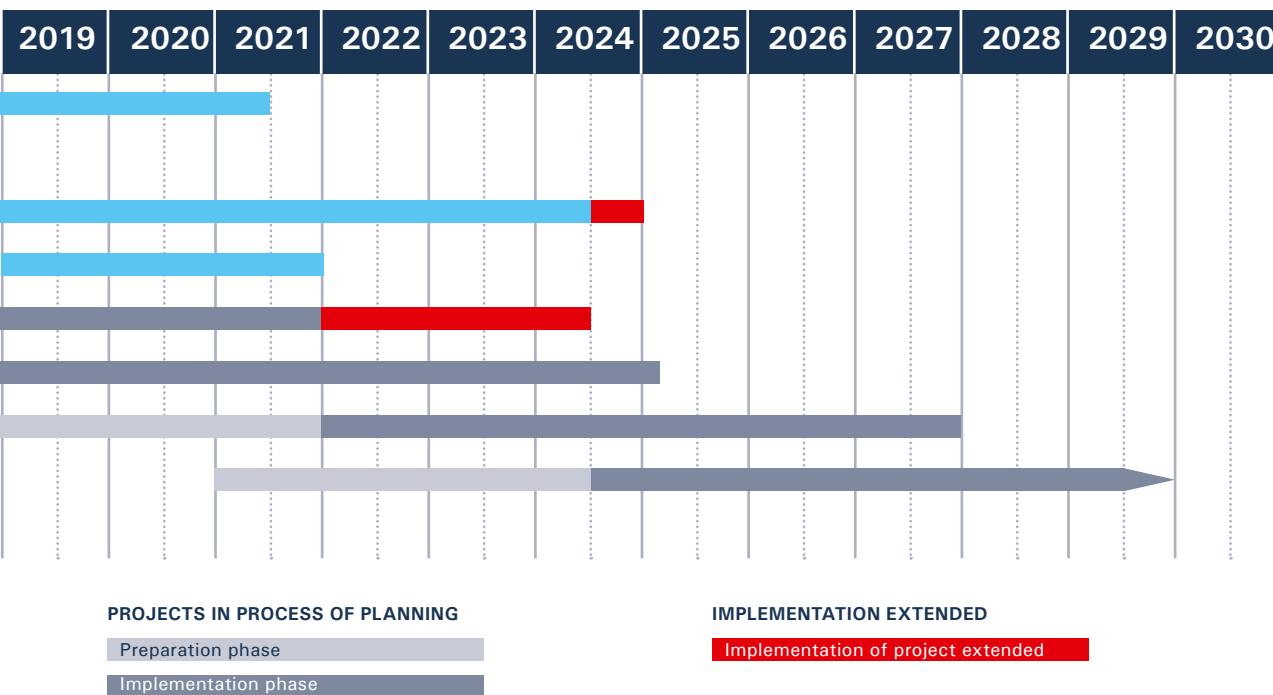
Even in future, then, the Kiel Canal will play a highly significant part for the Port of Hamburg as an element of national infrastructure and the Trans-European Network (TEN)?

Seen overall, the outlook for the Kiel Canal is fine. Provided the planned measures for its modernization and expansion are implemented by 2030, the canal will be more efficient and more attractive for shipping as a short cut to/from the Baltic than ever before. I am convinced that the 'hard times' of the last three years marked by

failures and delays are now behind us. Since the end of 2015, the canal has again offered calculable passage without waiting times. Also profiting from this is the Port of Hamburg, which due to delays in the canal has occasionally had to surrender transshipment cargoes to competing ports. Happily for us, customers who had sometimes reoriented themselves are meanwhile gradually coming back. Even in times of comparatively low bunker rates, the time and distance advantages of a canal passage remain a real option. The Kiel Canal Initiative will continue to direct its efforts to seeing that the canal's further development is oriented towards the needs of its customers, and the Federal Waterways and Shipping Administration is given the assets needed to do the job. Without these essential resources, modernization can barely be achieved.

Even with adequate human resources, the complete renewal of the Kiel Canal will take some time. Will improvements for canal users already become noticeable at the construction stage?

Yes. Completion of a separate section of construction will already considerably simplify traffic flow in the canal. In addition, we promise ourselves a considerable optimization of operation thanks to the introduction of the new controlled entry for the canal. This applies especially to the development of traffic between Hamburg and Brunsbüttel. We hope that this measure will be implemented before the end of the decade.



What exactly will this controlled entry mean?

In future every ship that has applied for a canal passage should receive notification of the time of her likely lock entry between 10 and 15 hours before reaching the lock in Kiel or Brunsbüttel – comparable with a plane's slot on approach to an airport. At present that just depends on who shows up first at the lock. Between Hamburg and Brunsbüttel, for instance, introduction of controlled entry would mean that ships no longer need to take part in a hectic 'sprint', but can plan their voyages precisely, and therefore sail more fuel-efficiently. The result would be lower bunker consumption and not least, a reduction in exhaust gas emissions. In addition, fewer ships would lie in the roads off the locks, something that's in the interests of safety in these heavily frequented waters. Last but not least, pilot deployment would be easier to plan. The new controlled entry system involves a mass of advantages for the individual canal customer, but also for safety and environmental protection at sea.

Do you already know when the system will go into operation?

The Federal Directorate-General of Waterways and Shipping that is responsible is still at the planning stage. Subsequent implementation as well as exhaustive tests will certainly take some time. The Kiel Canal Initiative will nevertheless argue strongly for the speediest possible action, since we see the planned controlled entry as a genuine milestone,

and one which requires only a comparatively moderate investment.

You can find more about the upgrading of the canal and the work of the Kiel Canal Initiative (IKC) at www.initiative-kiel-canal.de. The Initiative's current membership of about 50 includes shipping companies, shipbrokers, pilots, chambers of commerce, trade associations, regional authorities, and individual members. Port of Hamburg Marketing is among the cooperation partners and is alongside the IKC in championing the canal. ■

Kiel Canal Initiative

The Kiel Canal Initiative was founded in 2012. More than 50 members, shipping companies, service providers, trade associations, politicians and private individuals aim to anchor the Kiel Canal in political and public awareness more strongly. They regard the canal's ability to function and its modernization as a national challenge and a contribution towards Germany's ability to compete.



*The ferry STENA
SCANDINAVICA
is landing at Kiel's
Schwedenquai shortly
after 9 o'clock*



From the Jacuzzi suite to heavy-lift cargo

For sure, the Swedish shipping company Stena Line operates the Baltic's most multi-purpose ferries. Two vessels ply every day in opposite directions between Gothenburg in Sweden and Kiel, the capital of the North German state of Schleswig-Holstein. They convey cargo of various types across the Baltic, also speeding tourists towards their holiday destinations. Now Stena Line is aiming to gain more project cargo for the ferry services and to further expand its Freight Division.



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**STENA SCANDINAVICA:**

- Length: 243 metres
- Width: 29.3 metres
- Built: 2003/2007/2011
- Car capacity: 300
- Passenger capacity: 1,300
- Gross tonnage: 57,958 t
- Draught: 6.3 metres
- Speed: 21.5 knots
- Freight capacity: 3,800 lane metres

A siren wails to signal that the angle of the ramp needs to be adjusted. Since this had initially been awkward, the vehicles inside the ferry could have been damaged. Now the 'go ahead' is given. "The ferries function like an extension to the roads," explains Gerschefski. "Loading in Gothenburg is across the bow ramp and so here in Kiel the trucks and trailers are correctly positioned to facilitate rapid unloading by driving off forwards."

A very mixed bag now glides off the four decks and 3800 metres of lanes: Cars, many towing caravans, motor-bikes, coachloads of tourists – in other words, motorists and attachments first. Run-of-the-mill trucks follow, then two car transporters with brand-new Volvos from the Swedish plant, and on several vehicles, long sections of a gigantic viewing platform. This had been erected in Stockholm for the Eurovision Song Contest and is now bound for Kiel and its world-famous regatta week.

As soon as the manned vehicles are ashore, the Tugmasters set to work. These are tractors joined to trailers by fifth-wheel couplings. Operated by Port of Kiel Stevedoring, these vehicles tow the unmanned semi-trailers backwards out of the belly of the ship, bringing them and their container or break-bulk loads to the adjacent intermodal terminal. That goes extremely quickly, with the tractors buzzing to and from several times between the ferry and the rail tracks at a speed of 25 kilometres per hour, taking just sixty seconds for the short hop.

As Ulrich Kock, Shipping Logistics Manager with Stena Line, explains: "Ferry and block-train departures are coordinated and transport by the two carriers can be booked and settled as one transaction. Just recently, we were able to celebrate the departure of the 1,000th direct block train to Verona in It-

It's now something of a daily routine that a 243-metre ferry sails into Kiel Fjord seven days a week, berthing punctually at Schwedenquai around 09.15. That's what the timetable says, and so far it's actually been achieved on the dot. Several jobs need to be done before the ship casts off again for Gothenburg at 18.45: Loading and unloading, cabin cleaning, re-stocking the catering side. Detlef Gerschefski, Stena Line's Port and Security Manager, quite the seadog in appearance, provides some insights into operations in the high security area on the quay, which meets ISPS standards. As the ship berths, the stern ramp is being lowered with a loud hissing.

aly. This service is run twice a week by Stena Line and Kombiverkehr Frankfurt, and our next goal is to have four weekly departures." About a year ago, Stena Line set up a project group to strengthen rail traffic with the hinterland and also to gain a commercial stake in the expansion of rail as a reliable and environment-friendly mode of transport. "Via various hubs, the entire European hinterland as far as Istanbul can be reached. Five shuttle trains a week also run to Hamburg-Billwerder, and from there onwards to Duisburg, Munich or Basle, for example."

Being in the city centre, the intermodal terminal on Schwedenquai is not especially extensive, so block trains are initially split into four and then assembled again on the next stretch of track. The best use therefore needs to be made of the terminal's limited space. To achieve this, the Port of Kiel acquired a rubber-tired gantry crane with a reach covering three rail tracks, a reach stacker being used for the fourth. This has substantially cut handling time. A worker from Port of Kiel Stevedoring operates them one after the other, to separate the incoming trailers from the tugmaster and load them on to the appropriate railcars. Between ten and twelve dockworkers are deployed simultaneously during a shift.

.....
**"We are talking to
 representatives of industry,
 with car manufacturers, for
 instance, and attempting
 together to offer low-cost
 and efficient transport
 solutions,"**

Back on the ferry, one can now move about inside. Tugmaster tires are still squeaking away and the last trucks, with hazardous cargoes, are now leaving the aft deck. Be wafted up to Deck 15 by the elevator, however, and suddenly peace descends. Up here, precious little can be heard of the unloading process on the four lower decks. Like rugby goalposts, the funnels frame the wonderful view of Kiel Fjord from the Upper Deck. This is obviously a pleasant place for strolling around during the crossing, lasting fourteen and a half hours. The cabin categories range from small inside hideaways to the suite with its own Jacuzzi. Equally, some areas are reserved as a retreat for truckers following the strenuous drive on land – and these are well away from the chatter of the tourists. A special Truckers' Lounge in the restaurant is screened off from the rest of the facility, gaming machines stand in rows. "In recent years quite a lot has changed too for our leisure passengers," says Ulrich Kock. "We used to have a big entertainments area that made the voyage itself an experience. Customer needs have clearly shifted so that the crossing itself is their main requirement. Barely anybody will pay the fares then normal for a full entertainment package, if he can reach the same destination more quickly by plane for fewer than 100 euros."

For suppliers like Stena Line, therefore, impacts from several sources combine to affect the vessel.

The trend means that the Ulrich Kock's Freight Division needs to look for different ways of filling up the ship. For about three years now, he and his six colleagues in the Shipping Logistics Team have been looking for new business areas in the freight field that have not previously been covered by Stena Line. "We are talking to representatives of industry, with car manufacturers, for instance, and attempting together to offer low-cost and efficient transport solutions," explains Kock. Building up long-term business based on shipping cars can take three years or more. At that stage, ongoing contracts then guarantee long-term utilization of ferry capacity. In recent years, for instance, 5,000 new Volvo and Scania vehicles have been shipped, including numerous high-end Volvo XC90s for the North German market. Secured by Kock, these deals can offset lower ferry rates in the tourism sector and keep operation of the route commercially viable. The switch to cargo, and especially out-of-gauge project shipments, is having



an effect: 2015 brought a distinct hike in demand in the heavy-lift sector.

Kock is convinced that this change shows the way ahead for ferry operation: "Project cargo that was previously out of the question for us on account of its dimensions can meanwhile be loaded aboard with no problems, later to be transported into hinterland regions lying as far away as Kazakhstan. Even though as a port we are far smaller than Hamburg, this means that we play our part in the transport chain."

It is obvious that work on the quay wall of Schwenkenquai is no longer such a matter of routine as it had seemed to be that morning. Fresh heavy-lift cargo is arriving every day and when being transferred from ship to rail or vice versa, each batch poses different challenges – almost like the demanding couple in the Jacuzzi cabin. ■



© Franz Schepers

STENA LINE:

- 23 routes with approx. 35 vessels (RoPax, RoRo and Combi ferries)
- 1.8 million freight units per year
- 1.5 million cars
- Total passengers: 7.2 million – of which on the route Kiel-Gothenburg: 400,000 (+2% in 2015)
- 5,600 employees



Ulrich Kock, Shipping Logistics Manager and Detlef Gerschetski, Port and Security Manager, explain the unloading of the Stena Line ferry.

“In hardly any other region in Europe is there such intensive cooperation.”



Interview with Professor Kurt Bodewig , former Federal Minister.

Professor Bodewig, as a former federal minister today you hold many offices. That is quite remarkable.

Well, at the moment I am heavily involved in the Transport European Network, TEN. I am the EU coordinator responsible for the Baltic-Adriatic Corridor. It helps to keep me busy.

Let's turn to the Baltic region, the topic for this magazine. Is Hamburg the most westerly port in the Baltic region?

Yes, in the past we spoke of the Port of Hamburg as being the ‚Gateway to the World‘. Today it is also the most important port for the Baltic because it has the highest handling volumes for this semi-enclosed sea.

You also hold the position of Chairman of the Baltic Sea Forum. The nine member countries all lie around the Baltic Sea. In a way they make up a sort of ‚model region‘, which is how they are often referred to.

.....
“Germany is a transit country for Europe, almost all east-west traffic passes through Germany.”

‚Model region‘ is a very good description: In hardly any other region in Europe is there such intensive cooperation. It has a lot to do with the Hanseatic League traditions, that many hundreds of years ago created economic cooperation throughout the whole Baltic Region. Today, many elementary, important areas of life have been added: Energy supplies, science and research, logistics systems for land and sea. All this shows that it is meaningful for the EU to be present with many projects in this area.

As the Chairman of the Baltic Sea Forum I can clearly state: „Yes, the projects are running!“ The latest is now EMMA to implement sustainable traffic flows including inland waterways.

With so much cooperation, is our existing transport network still enough, the Kiel Canal, the rail

network and the only partially completed coastal autobahn?

In the new federal transport plan there is still room in the North German area for many development projects, above all maintenance presents a considerable challenge for hinterland connections. We need money for that...

What the expert commissions named after you have clearly and precisely stated.

For your information: There are two ‚Bodewig Commissions‘. The first is working on sustainable financing for transport infrastructure. The second is busy with quality. How can we develop the building and maintenance of the transport system? Latest news: Commission II and the Transport Ministers‘ Conference have unanimously decided on suggestions for organising (new)building and maintenance. Consensus for such topics is fundamentally important. The suggestions are now before the German parliament.

Have these enormous tasks perhaps something to do with Germany's geographical position, right in the middle of the continent?

Undoubtedly, you can say this. Germany is a transit country for Europe, almost all east-west traffic passes through Germany. The traffic burden is high and it is therefore vital that we keep the infrastructure in good repair. That is a considerable challenge!

Do you have any examples of this?

The bridges for example. In the 1970s many bridges were newly built using pre-stressed concrete. Today many of them show signs of erosion. Then little was thought about renovation and maintenance. This is why we have such an enormous demand for renovation and replacement today. Thankfully this now has priority. But new building is also under discussion. We find ourselves following the paradigm change set in the federal transport plan.

A second example that is so important for Hamburg is the Kiel Canal. Apart from building the fifth lock near Brunsbüttel, there is a great need for renovation along the whole length.

INTERVIEW

The task for a functional transport system is enormous. 45 billion Euros are needed just to catch up on maintenance of the whole network. This is equal to the investment volume in the transport budget for four years!

Let's move on to your focus as coordinator in one of the Europe-wide transport systems, TEN. What is your work there?

In total there are nine TEN-T corridors, most easterly is the Baltic-Adriatic core network Corridor, the one I manage. As coordinator you develop work plans for the whole corridor in agreement with the governments involved. Where border projects are concerned, the two countries are involved; in quite a few cases three. Everything has to be completed quick-

ly: There are an enormous number of deadlines and agreements.

How large is EU participation in financing?

That varies between old and new member states. For members joining after 2003 there are higher participation quotas than for older members. All in all one can reckon on a fifty-fifty split between the EU and co-funded capital.

What about the time frame?

The core network planned for 2030 must now be developed, this is tight timing: 14 years pass very quickly. It must be implemented step by step. The EU has made about 24 billion Euros available in cur-

Prof. Kurt Bodewig,
Former Federal Minister



INTERVIEW

rent finance period. The 'Juncker Plan' provides further financing options. My colleague Carlo Secchi and I formulated an action plan, which has been put forward by the EU Council of Transport Ministers for the transport sector.

And finally two short glances at the 'Motorways of the Sea' or 'MoS'.

Sea transport and coastal routes are the most environmentally-friendly in relation to the amount of freight carried. This is also true for the Baltic Sea. This is why the EU is supporting the MoS project. It is not enough to have the ships use the MoS, the appropriate infrastructure must be provided starting with high performance customised IT systems for the ports through to innovative technologies.

An example of such innovation is refitting ships propulsion systems for environmentally-friendly liquefied natural gas, LNG. Seen today as the most important

propulsion and fuel technology, enabling the strict emission values, SECA to be kept to in the Baltic.

And a few words on the EMMA project.

In past financial periods of the Baltic development plan Interreg IV B we have worked on, for example, cleaner ship technologies, as well as the rail network as a sustainable mode of transport. EMMA should now extend to sustainable transport on inland waterway routes.

I am very pleased that Port of Hamburg Marketing (HHM) coordinates the project, as under the leadership of HHM cooperation was excellent in the past years.

Resumé Professor Kurt Bodewig, former federal minister

Prof. Kurt Bodewig was born on 26 April 1955 in Rheinsberg. After completing his vocational training he worked as an agent in the property and housing field. From 1981 to 1986 he headed the administrative office

First refuelling of the MS Ostfriesland with LNG by Bomin Linde LNG in Emden



© Bomin Linde LNG

for compulsory civilian service. From 1986 to 1998 he was department head in the North Rhine-Westphalia district of the German federation of trade unions.

From 1998 to 2009 Bodewig was a member of the Bundestag - the Lower House of the German Parliament. In the years from 2000 to 2002 he was Federal Minister for Transport, Construction and Housing. Among other things, during his term of office the legislation on truck tolls was passed.

Resulting from his positions as Vice-Chairman of the European committee of the German Bundestag, his work as Maritime Ambassador in the EU commission or since 2014 in his function as European Coordinator for developing the Trans European Transport Network, TEN-T, he has gained extensive knowledge in international development.

Since 2007 Bodewig has been the President of the Deutschen Verkehrswacht e.V., German Traffic Watch, and since 2009 Vice-President of the Verkehrssicherheitsrates e.V., the German Road Safety Council. He also works in scientific advisory boards and international commissions on the question of transport policies. He holds the title of Honorary Professor at the university of Osnabrück and the University of Hefei (China).

From August 2015 to March 2016 he was the Chairman of the Conference of Transport Ministers commission, 'Building and maintaining the transport network.'

Kurt Bodewig is married and has two sons. He lives in Hamburg.



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The Fehmarn Belt Tunnel is going to link road traffic between Germany and Denmark with a four-lane motorway

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Fehmarn Belt Crossing – A Trail-Blazing Tunnel

The idea is not exactly new, but its implementation requires patience – a lot of patience. As early as the mid-19th century people were fascinated by the idea of having a fixed link across the short distance of roughly 18 kilometres, over the Baltic Sea, between Central Europe and Scandinavia. Today the goal, in the shape of a crossing between Denmark and Germany, is almost within grasp. In September 2008, the cornerstone was laid with the signed treaty between the Kingdom of Denmark and the Federal Republic of Germany for the construction of a fixed link crossing the Fehmarn Belt.

This is a project of such magnitude that it will benefit the trans-European transport network from Finland to Sicily. The approximately 17.6 kilometre-long tunnel will run from Puttgarden on Fehmarn across the Belt to Rødby on the island of Lolland. Denmark is responsible for constructing the immersed tunnel and its infrastructure on the Danish side; Germany has committed itself to providing high-capacity road and rail infrastructure on the German side.

Legal action and waiting time

Since 2008 a lot of water has flowed under the proverbial bridge through the Belt and the sheer dimension of the project has taken its toll. Even though a major share of the estimated cost of 7.4 billion Euros for the tunnel construction is financed by Denmark, on the German side protests by citizens and environmentalists have led to a corresponding delay. The planned start of building in 2015 was not to be. Today, the earliest possible starting date is expected at the end of 2019. Then you have to



Well, what do you know? Facts & figures about the Fehmarn Belt Tunnel:

- With a length of 18 kilometres, it will be the longest immersed tunnel worldwide.
- The tunnel will comprise a four-lane motorway and a twin-track, electrified railway line.
- The tunnel will consist of 79 individual elements, each 217 metres long, plus 10 special elements with a lower level used for storing operating and maintenance equipment.
- Each tunnel element weighs 73,000 tons - the same as 14,000 elephants.
- The quantity of steel needed for the tunnel is roughly the same as for 50 Eiffel Towers.
- Constructing the Fehmarn Belt Tunnel will create employment for up to 3,000 people.
- Transit time between Germany and Denmark will be 10 minutes by car and 7 minutes by train.
- The speed limit in the tunnel for cars will be 110 kilometres per hour. Electric trains will pass through the tunnel at 200 kilometres per hour.



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reckon with a construction phase of some 8.5 years. Germany's costs are limited to upgrading the hinterland infrastructure. Reliable figures cannot yet be supplied. The forecast made by the 'Bundesrechnungshof' or Federal Court of Auditors for upgrading the rail network however already envisages a cost increase from the original 800 million Euros to 2.3 billion. DB Netz – the German Rail network, as principal, promoter and operator, is responsible for expanding the rail infrastructure. Based on a regional planning order, in summer 2015 German Rail completed the technical pre-planning for a twin track, electrified, rail link between Lübeck and Puttgarden. Because of the massive protests the development of a new track route was necessary, since the use of the existing line through holiday resorts was rejected. Add to this the cost for an additional crossing to the south, namely Fehmarn Sound between the German mainland and Fehmarn, since renovating the existing bridge is not economically viable. Apart from the rail link, the main road has to be upgraded, comprising the four-lane expansion of the B207. Although planning approval was granted in August 2015, construction work is now delayed by numerous lawsuits.

Constant dripping is wearing away the tunnel

In the meantime, doubts started budding among

Danish politicians too. In the 'Folketing', the Danish parliament, the implementation of the Fehmarn Belt crossing was again put to the vote in March of this year. The majority of members voted for the project, making the way clear for the planned tunnel building. Renegotiating with the construction companies in the same month led to reducing the budget to around 7.1 billion Euros.

Femern A/S was commissioned by the Danish Transport Minister with the planning and construction of the Fehmarn Belt Tunnel between Denmark and Germany. Femern A/S led negotiations with the potential building contractors. At the end of May, these ended successfully, reaching an important milestone in the Fehmarn Belt fixed link project: Femern A/S signed four main building contracts worth four billion Euros with the selected international consortia for the construction of the Fehmarn Belt Tunnel. At the signing ceremony, Claus F. Baunkjær, CEO of Femern A/S commented: „We are very pleased that, after years of preparation and tendering, the main contracts have now been signed with the selected construction companies. This now means that we can pay our full attention to the German planning approval order. This is a prerequisite that has to be fulfilled before we can start building.“ German planning permission is the still missing piece of the puzzle before starting construction. ■

EU TENTacle Project: Fehmarnbelt Pilot Case

Once completed, the Fehmarnbelt Fixed Link will be an important element in the Scandinavian-Mediterranean core network corridor within the trans-European transport network (TEN-T). Its impact on the transport and logistics environment in North Germany, South Denmark and South Sweden brings the promise of both opportunities and challenges.

The accent of the Interreg Baltic Sea Region Programme TENTacle project is to make positive use of, and ensure better access to, the new structures of the TEN-T for different regions and geographies. To this end, the future Fehmarnbelt region stands in the focus of one of the project's seven pilot showcases. Port of Hamburg Marketing (HHM) is the leader of this Fehmarnbelt Pilot Case. Jointly with ISL, Rostock Port and Guldborgsund Municipality, HHM will compile a guideline on how the changed transport structures, caused by the construction of the tunnel, can act as a stimulus for regional development in the regions affected. This will include best-practice examples and recommendations, e.g. for new logistics models and transport solutions. The aim of the pilot case is to

mobilise business players and regional planners to jointly develop a long-term positioning strategy. Further information on the TENTacle project and the Fehmarnbelt Pilot Case can be found on the www.tentacle.eu website. Your HHM contact person is

Katja Höltkemeier (hoeltkemeier@hafen-hamburg.de, Tel: +49 (0)40 37709 115).

EVENT NOTICE:

Panel Discussion during Fehmarnbelt Days 2016 – “Effects of the Fehmarnbelt Fixed Link on Commodity Flows and Economic Development”

Speakers already confirmed for the panel discussion, with experts from politics and business organised by TENTacle, are amongst others Hamburg's Senator for Economics, Transport and Innovation, Frank Horch, and the Managing Director of the Lübecker Hafen-Gesellschaft (Port of Lübeck), Prof. Dr. Sebastian Jürgens. **The discussion will take place on 21 September 2016 from 11:00 to 12:30 at the HafenCity University. Admission is free. For registration and further information: www.fehmarnbeltdays.com.**



Port of Kiel: Paper handling generates capacities and jobs



By acquiring two new customers, the SCA and Iggesund Paperboard groups, the Port of Kiel is enlarging its capacities. Kiel has been incorporated in the logistics network of these Swedish companies, and its Ostufershafen expanded into a handling and distribution centre for forestry products. With its first-class terminal infrastructure, Kiel offers optimal conditions for handling and storage of general cargoes, raw materials, and forestry products like paper as well as high-grade cardboards. About 25 million euros are being invested in the new logistics centre for forestry products.

Apart from its excellent strategic location at the NE end of the Kiel Canal, Berth No. 1 that has been selected for paper handling is 400 metres in length, with a draft throughout of 10 metres. The equipment here includes a RoRo ramp suited to heavy-lift cargoes and two port cranes. The full-scale project will commence this summer, when SCA vessels from Northern Sweden will be calling regularly at Ostufershafen, bringing up to one million tons of forestry products per year. These will then be shipped onwards within Germany and to markets in Central and Eastern Europe.

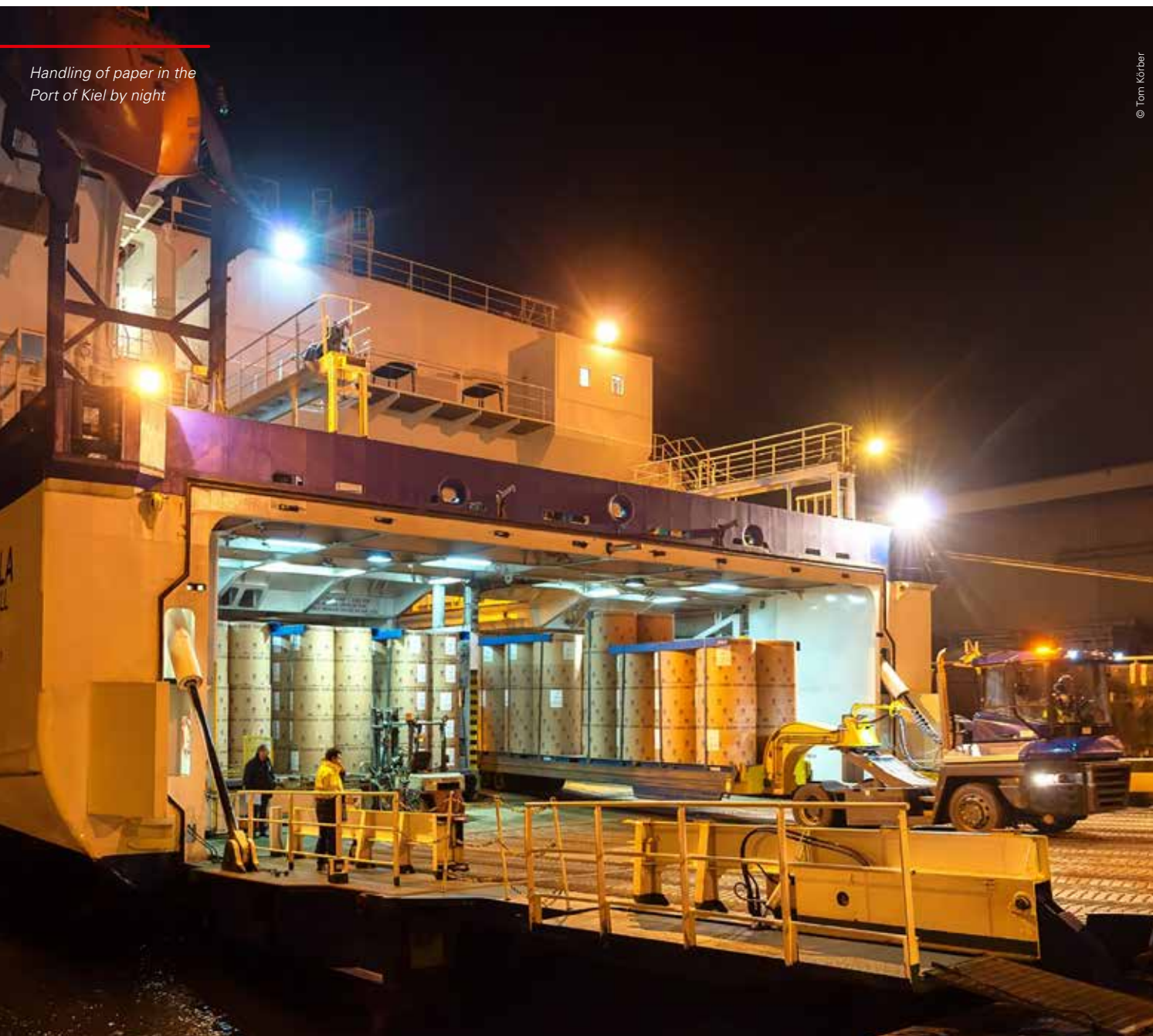
The first shipments were unloaded back in December, initially consisting of smaller quantities for storage and distribution. This is a trial run, so to speak, to tune all processes optimally before complete shiploads are handled from this summer onwards. Port of Kiel Stevedoring will supervise handling. The company is investing in additional equipment and will create 50 new jobs.

The port facilities and warehouses are owned by the Port of Kiel. This project is making a substantial contribution to port growth. For the new cargo handling business, for instance, the two warehouses adjacent to Berth 1 are being thoroughly upgraded. The result will be a new 18,000-m² warehouse - Shed 10. Paper rolls can be stacked there up to a height of 12 metres. The building will be completed and enter service by

October. A third new shed is also being built very close to Berth 1: Shed 8 has working space of 7,000 m², and should enter service in July. Building work on the sheds is on schedule and topping-out ceremonies were held at both in May.

Rounding off the investment are construction of a new 7,000-m² shed for Russian sawn timber, and purchase of a warehouse from a former grain trading company, which will give the forestry product clients a further 5,000 m² of shed storage space. So the scene has now been set in Kiel for further boosts in cargo handling. Since the Port of Kiel already has many years of experience with forestry products, which are among the most heavily traded goods in the Baltic region, the new SCA/Iggesund business matches the location and the Kiel portfolio extremely well. ■

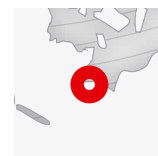
Handling of paper in the Port of Kiel by night



© Tom Körber

Lübecker Hafen-Gesellschaft: Visionary

Port Operator pursues diversity



As Germany's largest port operator on the Baltic coast, Lübecker Hafen-Gesellschaft (LHG) operates four terminals, including LHG's biggest terminal, Skandinavienkai that is characterized by its Europe-wide RoRo and ferry traffic. A network of high-frequency liner services offers up to 13 sailings daily to partner ports in Sweden, Finland and Latvia.

LHG continually invests in modernization measures, to ensure the long-term quality of Skandinavienkai. One example of this is the introduction of the third generation of scanning equipment. Since the end of last year, trucks have driven through the new scanning unit into the gate and are automatically registered. The gate operator receives data from the scanning unit's registration plate recognition function and pictures on his screen. The available information

is double-checked and matched to an existing ship's booking in the Integrated Port and Logistics System, IHS. This then instructs the driver where to position the trailer. Similarly, the trailer exit is via a new scanning lane that books trailers back out of the port.

Another upgrade at Skandinavienkai is replacement of the overall surface-area lighting currently installed by LED lamps. A test phase is in progress, leading to feedback for Lübeck Port Authority. An application for subsidies to the Schleswig-Holstein state government should follow very shortly. The work should be completed at the beginning of 2017. This re-equipment produces both ecological and commercial gains. The environment will benefit, since LEDs contain no mercury, meaning that they are not hazardous waste. In addition, with the forecast ener-

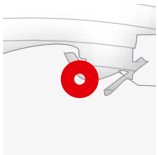


The new scanning unit is accelerating the notification procedure for inbound and outbound trucks

gy-saving of around 70 percent, LED lighting will improve energy efficiency.

LHG's Nordlandkai is traditionally the handling of paper and cardboard. In future it should be more diversified, expanding the logistics chain. This will then include warehouse logistics, incorporating special IT solutions for inventory accounting and picking, handling project cargo, by inland waterway vessel, too, as well as the potential for seasonal trade activities. Importers and foreign providers could then for example install their Point of Sale at Nordlandkai and book further services.

LHG Group is continuing to count on the Russian market. It is LHG's goal to build up liner services to Russia and the Baltic States. To strengthen its local presence, its forwarding subsidiary, European Cargo Logistics (ECL), set up 'OOO ECL Rus' as an affiliated operating company in St. Petersburg last year. This has already borne first fruit. Apart from increased imports of wood and regular shipments of paper, ECL has acquired its first steel shipments from Russia to Germany. These are shipped from St. Petersburg. In Lübeck the cargo is temporarily stored, then transferred to trucks and delivered to German importers and end customers by ECL. ■



Port of Gdansk: Poland's largest port going for container handling

Poland's leading container terminals, by volume handled, are Gdansk and Gdynia. In 2014, for instance, Gdansk's DCT container terminal handled around 1,200,000 TEU; the 2015 total being 1,070,000, corresponding to a downturn of ten percent. In the first quarter of this year, container throughput in Gdansk recovered by 13.4 percent to 310,000 TEU.

Calling at Gdansk, among other ports, initial direct calls by container liner services in the Baltic, for instance an East Asia service by the M6 alliance with Maersk and MSC, as well as one by the G6 alliance service, are affecting transshipment services at ports in the Northern Range. The Port of Hamburg's throughput statistics reveal that in total, the volumes transported since the third quarter of 2014 by feeder

Delivery of the first container gantry cranes for the second DCT-Terminal



© Port Gdansk

vessels between Hamburg and Gdansk, Gdynia and Szczecin have fallen.

According to an ISL survey in May 2015, direct services to the Baltic have primarily benefitted from the over-capacity of shipping space prevailing since 2009, as well as the low costs of charters. This means, it is certainly conceivable that should charter rates climb again and the containership fleet become better utilized, then direct services to the Baltic will be reduced again. It also remains to be seen whether growth in the Baltic region in the next few years proves weaker than was being forecast until just recently, with volume expectations of port operators in Gdansk and other locations needing to be scaled down. An additional factor is that on average, only about 20 percent of cargoes on board containerships in East Asia services are for the Baltic region. A dense network of feeder links is essential for distributing these containers throughout the region, something that by contrast with Hamburg, is not available in Gdansk. It is also significant that direct calls at Baltic ports by large containerships prolong round-voyage time by about a week, since thanks to the Kiel Canal, between Hamburg and Gdansk the feeder vessel covers a sea route only about half as long as the large ship, which has to take the longer route around Northern Denmark.

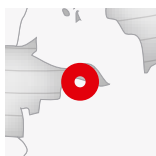
Poland, nevertheless, is and will remain a particularly important market for Hamburg, linked with it rapidly and economically by sea by eight feeder and short-sea services, and on land by 70 container block-train services and by truck. Constant expansion of Polish ports and infrastructure is taking place in parallel with a sustained positive trend for the Polish economy. The port operating company, DCT Gdansk, has received assent for a further loan of 290 million euros for further expansion of the terminal. Of this, the European Bank for Reconstruction and Development is contributing more than 31 million euros. Between 2022 and 2035, Gdansk plans to expand its container handling capacity to around 4 million TEU. The largest investment projects are for the modernization of the fairway of the Inner Port and the expansion of the adjacent rail and road network. The extension to a fairway with a width of 90 metres and a navigation channel with a depth of 12 metres aims to guarantee safe and efficient navigation between the entrance to the port and the turning point near the Remontowa Shipyard. To improve incoming and outgoing services, with the help of the investment program around 7.2 kilometres of roads and 10 kilometres of rail track are to be upgraded by the Port of Gdansk Authority. ■

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Port Bronka: St. Petersburg's new deepwater port

Since December 2015, St. Petersburg has had a new deepwater port with a water depth of 14.40 metres. Port Bronka can handle containers as well as general and RoRo cargo. At the first stage, private-sector owner and operator Fenix has taken into service an area of 132 hectares with over 1,430 metres of quay wall. With a direct link to the ring auto-bahn and its own rail facility, the terminal is well connected with its Russian hinterland.

Along with the excellent infrastructure already in place, Port Bronka offers four Post-Panamax container gantry cranes and is designed to handle ships with up to 8,100 TEU. The port's current annual handling capacity totals 500,000 TEU, which can be increased to 1.9 million TEU in the final stage of construction with the acquisition of additional handling equipment. Port Bronka therefore offers shipping lines potential for deploying larger, more efficient feeder vessels or even for direct overseas services.

The new deepwater Port Bronka is successfully in operation for half a year and has got a capacity of 500,000 TEU at the moment



The idea for building Port Bronka dates from the 1990s. In city planning terms, the aim was to relieve the centre of St. Petersburg of industrial port traffic. So in recent years Rosmorport, the Russian port authority, has concentrated port development for St. Petersburg on Bronka. On the basis of a public-private partnership, an investment agreement was signed early in 2013, under which the Russian state financed seaward access and in parallel, Fenix constructed the terminal infrastructure. Despite Russia's current economic and financial crisis, the two sides have fulfilled their investment obligations. Nor was public-sector support for terminal development confined to the infrastructure side: All the relevant Customs authorities are already represented at the terminal.

In managing the port, Fenix is relying on a mix of local know-how and international partnerships. HPC Hamburg Port Consulting, HHLA's consultancy subsidiary, was already involved in the planning and development of the terminal in the very early stages.

And with Dr Stefan Wilkens, a former HHLA manager is employed as General Manager for the container terminal.

The CMA CGM and Fesco shipping lines are currently serving Port Bronka regularly. Since March, regular block trains for the distant hinterland are also being regularly cleared here. Fenix is satisfied with the start of operations. "We could have wished for better background economic conditions for the start-up stage, but even now we can see that customers are recognizing the terminal's great efficiency and favourable location," says Dr Stefan Wilkens. Just as with St Petersburg, Russia is one of the Port of Hamburg's most important trading partners, so too links to and from Hamburg are of great relevance for Port Bronka's development. Confirming the significance of cooperation between the ports of Hamburg and St. Petersburg, Rd. Wilkens commented: "We are open to partnerships with companies in Hamburg – including any that go beyond existing ties." ■

Ole Heitmann,
Immobilienkunden-Betreuer

„Mein Projekt heißt Hamburg. Mit meinen Kunden möchte ich die schönste Stadt der Welt noch schöner machen.“

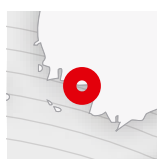
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 **Haspa**
Hamburger Sparkasse

The cruise ship AIDAcara in the Port of Turku. A new sewage system will simplify disposal of her waste water



© Port of Turku



Port of Turku: Committed to a cleaner environment

'Environmental protection' is a major issue in the Finnish Port of Turku and appropriate measures for promoting it have already been introduced in many areas.

Boosting the energy efficiency of port operation is one of the main goals on the port's environmental agenda. The investments involved are being made in 2016-2018. Among the moves covered are the renewal of all external and warehouse lighting with the use of LED technology, sophisticated lighting control, and thermal energy saving measures. The port is relying here not only on its own environmental program, also on its energy efficiency deal with the

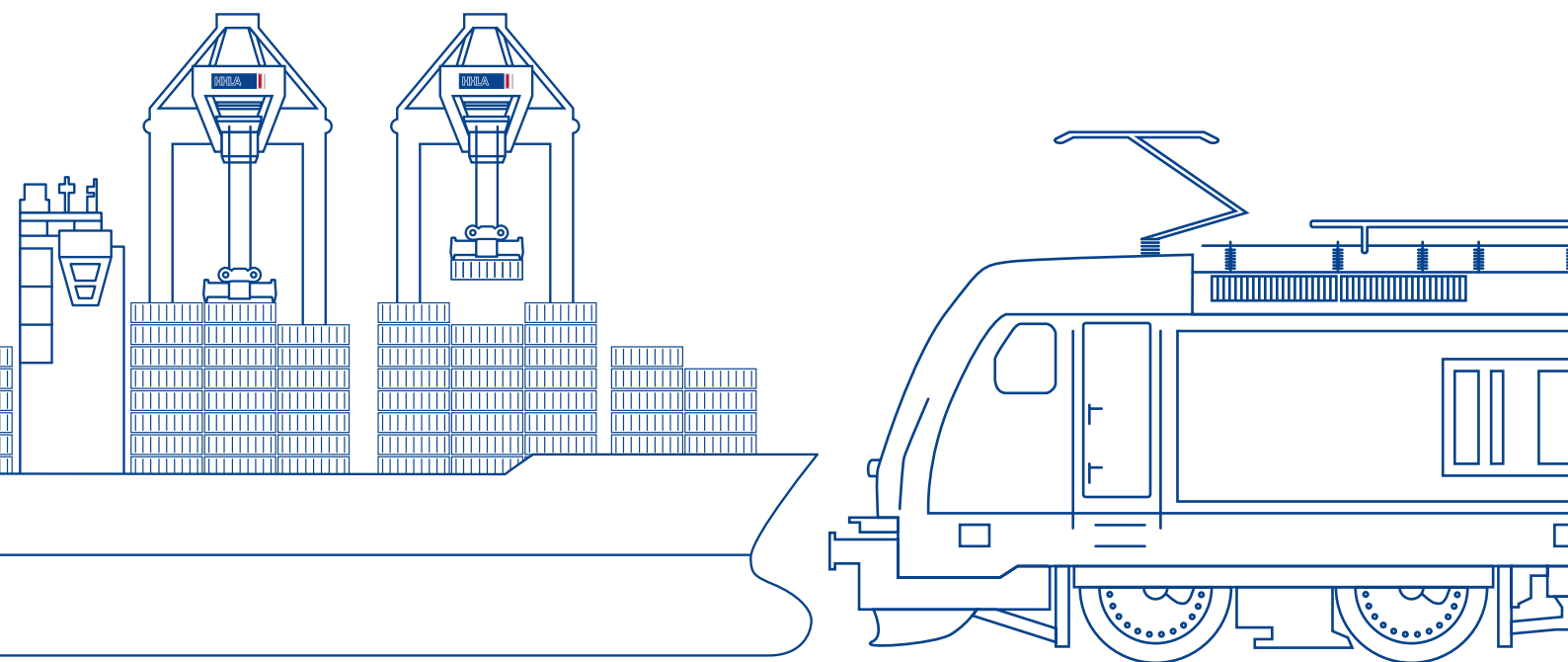
City of Turku aimed at making the area climate-neutral by 2040.

The opportunities offered by a growing number of electric vehicles or electric equipment as well as the potential from the use of solar cells are being investigated. For example, a charging station for electric buses in the passenger port is already at the planning stage. In the interests of the project for improved energy efficiency, the Port of Turku is cooperating with Turku Energia and port-based enterprises.

From this summer, both a new permanent wastewater disposal system and onshore power supply are being developed. The plan is to offer the latter to

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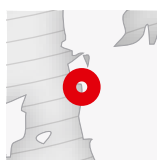


seagoing vessels before the end of this year. If these stop running their auxiliary engines in the port area, the din and the exhaust gas emissions will be significantly reduced. Construction of the waste-water disposal system will be achieved through the EU-financed ScanMed Port Project.

Three of Finland's core TEN-T ports are investing in the ScanMed Project: Turku, Naantali and HaminaKotka. Along with the Stockholm ports and Viking Line, they aim to cut down the environmental repercussions of Baltic ship traffic with investments totalling 8.1 million. The Port of Turku is involved to the tune of 2.2 million euros. The European Union is backing the investments by picking up the tab for 30 percent of the total.

Among the outcomes are the Port of Naantali's intention to introduce a waste-water disposal system comparable to Turku's, and Viking Line's planning for a safe, efficient and environmentally compatible Ro-Ro passenger vessel for the Turku-Stockholm ferry service.

The ScanMed project is one element in the maritime industry's commitment to introduce environmentally friendlier practices in shipping in response to the introduction of increasingly stringent regulations. For instance the new rules on waste-water disposal in the Baltic come into force for new passenger vessels from 2019 and for those already in service, in 2021. ■



Port of Gothenburg: The course is set for growth

It is the largest expansion project since the 1970s in the Swedish Port of Gothenburg. The regional government and the environment court have given the go-

ahead and issued approval for building a new freight terminal next to the existing one. The investment volume amounts to around one billion krone, or almost

The dimensions of the new terminal illustrated in the Arendal Bay



© Port of Gothenburg

111 million Euro. The course is set for growth with the building of this additional terminal on the outer rim of the port basin in Arendal Bay. Dredged materials will be used to build the terminal, which is planned to be finished in 2020. The area will occupy 220,000 square metres, the size of 30 football fields.

The terminal represents a major element of the port extension and provides the prerequisites for meeting the increasing demand for sea transport from the Port of Gothenburg. With the new terminal Gothenburg, the logistics capital of the Nordic region, will focus on short-sea shipping, sustainability strengthening it. With a maximum draft of 11 metres, Gothenburg's freight transport will be able to concentrate on inner-European routes, either as a terminus or hub for the most important transshipment points in North Germany, the Netherlands and Belgium for worldwide transportation.

„We have already taken note of the growing demand in the market. In addition, in Europe there are some political demands to move more traffic off the land and onto the sea, to relieve the roads and reduce the environmental impact,“ reports Magnus Kårestedt, CEO Port of Gothenburg. Up to now it has not been decided what sort of freight will be handled at the

new terminal, containers, RoRo traffic, such as trailers and cars, passenger traffic or a combination of many freight types. The approval allows for the terminal to be used according to future market requirements. Comparable to the other freight terminals in the Port of Gothenburg an external operator will be responsible for the new terminal. Interest is high to operate a terminal in the largest port in the Nordic region, according to Kårestedt.

One special feature while building the terminal is to use the dredged materials regularly brought up during maintenance of the port basins and the water depth. The dredged materials are collected in a dammed area of the bay near Arendal and consolidated by adding cement. The dredged material is then used as building material and does not have to be disposed of. The seabed is also playing an important role during the terminal building: Special attention is being paid to preserving it. Because as soon as a new port basin is built sea grass disappears from the seabed. Sea grass is a vital part of the marine ecological system of the new port area, providing a nursery for many types of fish. To compensate for the disturbance in nature the Port of Gothenburg will plant sea grass, which has properties similar to the original sea grass found in Arendal Bay. ■



PORT OF KIEL

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Relief on the North Sea and Baltic: New sulphur ceilings improve air quality

For around eighteen months, since 1 January 2015, reduced sulphur ceilings have applied to all shipping on the North Sea and the Baltic. In this marine SECA – Sulphur Emission Control Area, sulphur emissions in exhaust gases had to be reduced to 0.1 percent. The International Maritime Organisation (IMO), a United Nations agency, decreed this, and the European Commission followed up with a directive to EU member states.

The German Nature and Biodiversity Conservation Union (NABU) has now commissioned a survey indicating that the new regulation is bearing fruit. Total emission of ship's exhaust gases has fallen by 50 percent and as a result, atmospheric pollution in the North Sea and Baltic is also noticeably lower. The scientists commissioned, from the CE Delft research institute in the Netherlands, researched the repercussions of requirements for higher fuel quality on the environment and the maritime industry in the control areas. Their findings show that the reservations of shipowners about cost hikes and a transfer of traffic to the roads as a result of stiffer ceilings have not been borne out. Instead, the survey findings prove a generally positive national economic impact. Reduction of exhaust gas emission by 50 percent has brought lower costs derived from the health and environmental impacts necessarily borne by society. The survey suggests that the costs avoided in the health sector thanks to lower emissions of pollutants produce a saving of between 4.4 and 8 billion euros per year. On the other side of the ledger come additional fuel costs of 2.3 billion euros.

Improved air quality has also been confirmed by the German Federal Maritime and Hydrographic Agency (BSH). Official measurements commissioned by BSH produced a finding that approximately a year after the reduction of sulphur ceilings, the great mass of ships in transit on the Elbe are observing the limits. The German Shipowners' Association (VDR) states that while the low price of oil at present is helping shipping companies to shoulder the extra costs for low-sulphur fuel, shipping does stand in relative competition with other modes of transport, since the price of fuel has also dropped for trucks. In addition, many contracts with shipping customers provide for bunker costs to be adjusted to match the

current price trend. It is therefore impossible to talk of any real relief on energy prices, all the more since these are the largest cost factor in ship operation. The movement in oil prices and the embargo on Russia also make it difficult to judge the extent to which the new sulphur ceiling has made an economic impact in the ECA region.

A clean goal: Expand and improve management of environmental zones

Despite all successes on the North Sea and the Baltic, the snag remains that outside the SECA zone, bunker oil remains the standard fuel. Leif Miller, NABU's national chief executive, explains: "This SECA is a European model for success sending a clear signal that globally too, standards need to be tightened." The exhaust gas strain imposed by international shipping bears no relation to the exhaust gas systems made possible by today's technology. The IMO has laid down a sulphur ceiling of 0.5 percent for all waters as from 2020. NABU states that this is a deadline to be observed at all costs. Stiffer checks are an important move towards sustained improvement in air quality, for hitherto checking has been confined to specific port locations. Once at sea, ships can switch over to environmentally harmful heavy oil, which suggests a high, unquantifiable number of infringements of the law. So NABU is demanding the installation of permanent measuring devices on board all vessels, spot checks out at sea and in coastal waters, and also distinctly higher penalties.

The alternative fuels

To observe the new sulphur ceilings, shipowners need to adopt alternatives to the use of heavy oil. The need is for solutions based on a clean fuel guaranteeing a sulphur ceiling of 0.1 percent in emissions. One possibility is to clean exhaust gases with

the ship's own device, a shipboard scrubber that filters out sulphur. This can be connected to existing technical equipment and exhaust gas channels. One easily implemented solution is to use Marine Gas Oil (MGO) with a sulphur content of less than 0.1 percent. Most shipping companies are relying on this fuel. The advantage is that no major changes in equipment are required. Another factor is the low oil price for the past eighteen months. This makes MGO the most attractive variant from the commercial point of view.

Should the shipping company be willing to invest in alternative energies, LNG is ecologically and economically the best answer. The VDR also considers that the strict ceiling on sulphur emissions could contribute in the medium or longer term to more vessels using clean, liquefied natural gas (LNG). This is a natural gas that is transported as liquefied gas. Its liquid state is achieved by cooling it down to -162° C. This compression reduces 600 cubic metres natural gas to one cubic metre of LNG. That argues for the advantages of transport and storage. The challenges involved in operating ships with LNG are the adaptation of the ship's entire technology, on the one hand, and the persisting lack of infrastructure, especially in Germany, for bunkering this environment-friendly fuel, on the other. For this reason,

the number of LNG-fuelled ships on the North Sea and the Baltic remains child's play to calculate. To enable more ships to operate with low-pollutant liquefied gas, the VDR is pleading for effective public subsidies as start-up help.

According to the Baltic Ports Organization, at the end of last year the proportion of containerships, bulkers and tankers operated with MGO was still 98 or more percent. In the ferry bracket it was 81 percent, while 12 percent rely on using scrubbers and 7 percent are using LNG as fuel. In the RoRo category, not quite one percent of ships were fuelled by LNG, 28 percent use scrubbers and 71 percent are fuelled by MGO.

AIDA as LNG pioneer

One cruise ship is setting new standards. With the 'AIDAprima', the world's first cruise ship that when in port can be operated using liquefied natural gas is in service with AIDA Cruises. That reduces emissions once again, since with LNG supply, emission of sulphur oxides and fine-dust particles is completely avoided. Emission of nitrogen oxides is cut by up to 80 percent, and of CO₂ emissions by 20 percent. Preparations and first applications for permission for LNG operation are already powering ahead in the ports of Hamburg, Southampton, Le Havre, Rotterdam and Zeebrügge. ■



With the help of a LNG-tanker, large amounts of the liquefied natural gas can be transported

Port of Hamburg Marketing on course in the Baltic Region

The Baltic region has always been seen as the natural hinterland for the Port of Hamburg. Today a combination of factors such as containership overcapacity, cheap fuel and also the efforts of some Baltic ports to obtain more direct services to the Far East and North America, pose new challenges for the Port of Hamburg, which for more than 20 years has been a central hub for transshipment in Baltic transport.

Today it is even more important for Port of Hamburg Marketing (HHM) to be really active in the markets. For over 30 years the association, together with its member companies and selected partners have shown the advantages of the Port of Hamburg, establishing it in the market as the largest German universal port. To meet the increasing challenges and the ever keener competitive situation in the Baltic region, Port of Hamburg Marketing has had a dedicated new department since 2014. From the HQ in Hamburg, Lithuanian born Marina Basso Michael is responsible for the markets in the Baltic region and eastern Europe. She coordinates the work of the representatives in St. Petersburg and Warsaw and the activities of HHM in other neighbouring Scandinavian countries and the Baltic States. With specially initiated events, cooperation in trade fairs and with delegation visits, they fly the flag in the important Baltic market.

HHM lays particular importance on carrying out activities in the target regions as well as in Hamburg. Russia is a good example: Hamburg's First Mayor Olaf Scholz was an honorary guest at the traditional Port Evening in St Petersburg last September, underlining the essential importance of Russia for the logistics sector in the Hamburg metropolitan region. This was followed by a 'Russian Logistics Day' in October 2015, held in Hamburg, created through the joint efforts of HHM and the Russian partners.

HHM's project development department puts considerable effort into added value for ideal and practical connections between the Port of Hamburg and the Baltic logistics sector. The department, in cooperation with HHM's member companies, competes for EU transport and logistics projects, and when successful carries them out.

At the end of April this year the Port of Hamburg showcased at the Trans Russia Logistics fair in Moscow as usual with a large delegation made up of Hamburg Ministry of Economic Affairs, Hamburg Port Authority, Hamburg Business Development Corporation, and European Cargo Logistics. All shared a joint stand and were involved in many specialist talks and podium discussions. Here Secretary of State Dr. Bösinger (left) talking with the Russian Transport Minister Sokolov.





To build up contacts to the emerging Baltic countries HHM is heavily involved in Lithuania, Latvia and Estonia. In Klaipeda, the most important Lithuanian port city, HHM initiated the first German-Lithuania Maritime Forum in March 2015. Marina Basso Michael facilitated a podium discussion with, among others, HHM Executive Board member Ingo Egloff.



Our neighbouring country Poland counts as one of the very competitive target markets. With its hinterland transport via the inland corridor and also the sea route, trade relations with the Port of Hamburg count among the very competitive target markets. The HHM Representative Office in Warsaw has initiated and supported a series of events in the country's important logistics centres. Here Marina Basso-Michael greets guests to the port evening in Warsaw.

nection to this market region: TENTacle, NSB-CoRe and EMMA. All these projects are financed by the Interreg Baltic Sea Region Programme 2014-2020. Port of Hamburg Marketing manages the project and, with 20 other partners develops sustainable solutions for inland-waterway transport in the states around the Baltic. The region often has to fight against congested roads and rail infrastructure, where alternative inland-waterway vessels are not yet fully utilized. Through improved integration of inland-waterway vessels into the transport chain, we can see an environmentally-friendly and more efficient structure along the entire logistics process as well. This releases new transport capacities, which at the end of the day Hamburg can also profit from as hub port for many Baltic routes.

You can find more information on the EMMA project on the new website: <http://www.project-emma.eu/>.



The team is regularly active in various projects in the Baltic region contributing to ongoing cooperation with the representatives from the Baltic Ports and shippers. Since the Baltic, an important market region for the Port of Hamburg is strategically in focus, a strong emphasis is placed on projects in this region. Currently there are three projects running with a direct con-

PETER PICKHUBEN'S PINBOARD



Baltic Ports Organization Silver Jubilee

With the Baltic Ports Organization (BPO), a strong Baltic port community was formed some 25 years ago. Forty-five ports and seven friendship members, including Port of Hamburg Marketing and Hamburg Port Authority, from the nine neighbouring Baltic countries cooperate in the organization established in Copenhagen in 1991. The BPO wants to contribute to economic, social and the environment-friendly development of the maritime economy and port industry in the Baltic Region, with the aim of strengthening of the Baltic ports' competitiveness long-term. BPO represents the interests of Baltic ports with the EU and other institutions, playing an important role in the international dialogue relating to conferences and trade fairs that it initiated.

Axel Mattern, Executive Board Member of Port of Hamburg Marketing:

"The Baltic region is the second most important market for the Port of Hamburg after China. Despite many differences, all nine Baltic Sea countries are closely linked to each other. This is especially true for their ports. By forming a union in the BPO, every port contributes to the development of the region and its countries. We, Port of Hamburg Marketing, would like to congratulate the BPO on its anniversary. We hope that our strong ties will remain and we would like to express our thanks for your collaboration."



Extra-long freight train to Denmark now runs directly into the port

Since the end of 2015, extra-long freight trains have been serving the Maschen-Padborg line as a regular service extended into the Port of Hamburg at Hohe Schaar. The 835 metre-long trains transport a lot of freight with an efficient use of resources to/from Denmark and from there on into the rest of Scandinavia. Linking the Port of Hamburg to this line is an important step in mastering the increase in freight traffic by rail. It offers a significant increase in transport capacity for a limited investment in infrastructure. DB Netz rail network and HPA cooperated on the extended segment investigating its feasibility and taking the necessary measures to implement the link.

The trains on the pioneer route between Maschen and Padborg first exceeded the then maximum permitted length of 740 metres at the end of 2012. With their maximum total length of 835 metres, in comparison to 740-metre trains they can transport up to 10 more railcars and 15 containers per train. A feasibility study for 1,500 metre-long trains has already been under investigation for some time with the stated vision of the responsible rail managers to create a 'rail megalin'. Currently, there are many weekly departures between Maschen, Europe's biggest marshalling yard just to the south of Hamburg and Padborg, which lies on the Danish-German border.



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New Kattwyk - faster route to the Baltic

A combined Kattwyk road and rail bridge has already spanned the South Elbe between Kattwyk peninsula and Moorburg since 1973. Hamburg Port Authority (HPA) has planned this important infrastructure project to increase capacity in the western area of the port, and at the same time providing traffic relief on the eastern side. As early as November 2015 the new Kattwykstrasse road bridge spanned the river that will run on the eastern bank of the South Elbe and later the rail tracks that will also span Kattwykdamm. In spring 2016 HPA started construction of the main structure, the new lifting rail bridge.. From 2017 the steel construction, drive system and finally the track building will follow. In 2020, the new bridge should be open to traffic.

This will have an immediate positive impact on freight transport to the Baltic region. The diagram shows how the previous route via Harburg and Maschen will be shortened by the new Kattwyk rail bridge. Since it will no longer be necessary to change the direction of the trains in Maschen, HPA estimates the time-saving compared to the original route at around one hour.



Baltic sailing trips with Nord Event

Nord Event is well-known in Hamburg for its diverse events in the best locations in the North. For corporate events and incentives, even complete vessels can be chartered for staff and customers. This event agency also offers private individuals the opportunity of, for example, experiencing the German Baltic coast from the seaward side. During Travemünde Week or at Hanse Sail in Rostock, offerings include brunch on the windjammer 'Mare Frisium' in the morning, savouring cocktails in the evening, or simply taking part in full-day sailing trips. On the same three-master you can take a short break sailing for several days along the German coast and southern Danish sea. The Mare Frisium is the flagship of the Nord Event fleet. It is 52 metres long, 6.7 metres wide and accommodates 90 daytime and 29 overnight guests. For further information please visit the www.sail.de sailing portal, or www.nordevent-shop.de

PORTpeople:

Crew change at HHM's Press & PR Team

At her own request, **Sabine Zilski** left HHM at the end of April after more than six years and has set course for a new professional challenge. Since 2009 Sabine had been responsible for Press & PR work at HHM. I wish her all the best and real success in her new venture. And thank you for the super trips I was able to make with you.

At the beginning of July, **Annette Krüger** will take over her position in the HHM communication team. We wish Annette a hearty welcome to our team! If you want to welcome her too, then mail her under krueger@hafen-hamburg.de or call her on +49 40 37709 112.

Meanwhile, some of you have certainly had contact to **Marcel Peter**. Our work experience student in the communication team has been supporting HHM since the beginning of February. During his internship, Marcel has contributed a number of press releases and articles for the Port of Hamburg Magazine, designed brochures and campaigns and managed our Facebook pages.



Sabine Zilski



Annette Krüger



Marcel Peter



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Focus on transport chains and networking

Exploiting synergies, pooling resources and being on the ground in essential markets – Port of Hamburg Marketing's worldwide network forms the basis for achieving its aim, to successfully market and position the Port of Hamburg internationally.

Of special importance for this are our 13 representative offices. These are committed to furthering the interests of the Port of Hamburg and our members in Germany and abroad. These are superbly networked in the seaport business and possess outstanding contacts in their respective markets to companies in trade and industry, transport and logistics, trade associations and political decision-makers.

As a central point of contact, we brief German and foreign port customers on the Port of Hamburg's performance. A host of marketing activities such as market research, trade fair showcasing and special events, programs for visiting delegations, publications, press activities and Internet services, we daily boost the competitive position of Germany's largest universal port.

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Prepare for shipspotting with our list of expected vessels

Have you ever wondered what ships are going to call the Port in the next two or three days? Estimated time of arrival and data about the vessels like capacity, length and berth can be found on <https://www.hafen-hamburg.de/en/vessels/eta>.

Credits

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We see ourselves as a competent partner to our customers and create for you individual insurance solutions as needed.

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