

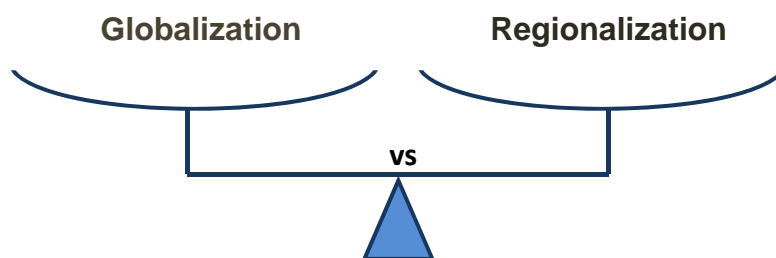
5 June 2014



Transport and Logistics in the Baltic Sea Region: Globalisation vs Regionalisation

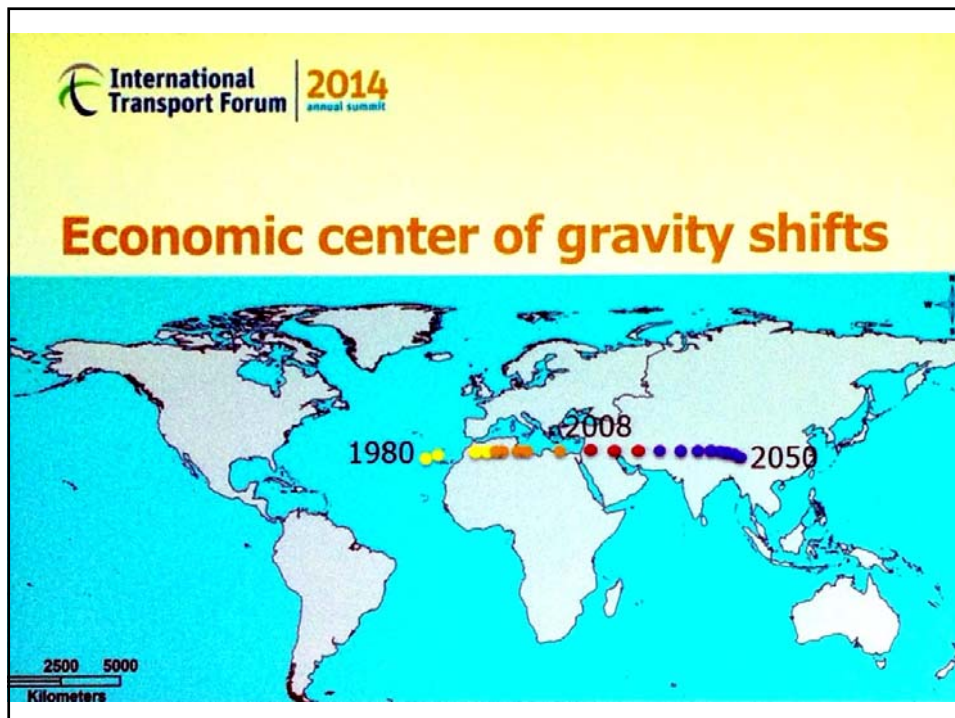
Igor Kabashkin

*Dr.hab.sc.ing., Professor
President of Latvian Transport Development and
Education Association (Riga, Latvia)*

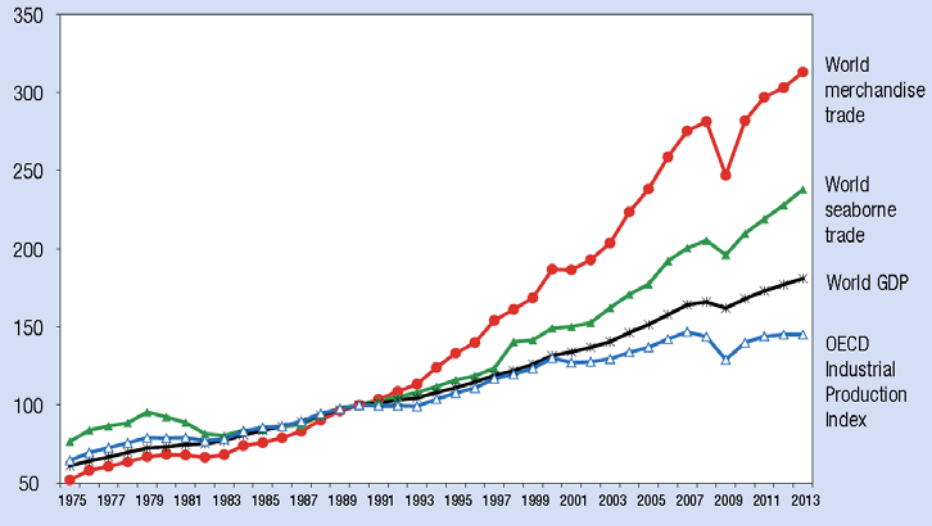


Globalization

- Economic center of gravity shifts
- Growth and limitation of containerization
- Deployment of «green» transport
- CO-OMPETITION = Co-operation + competition

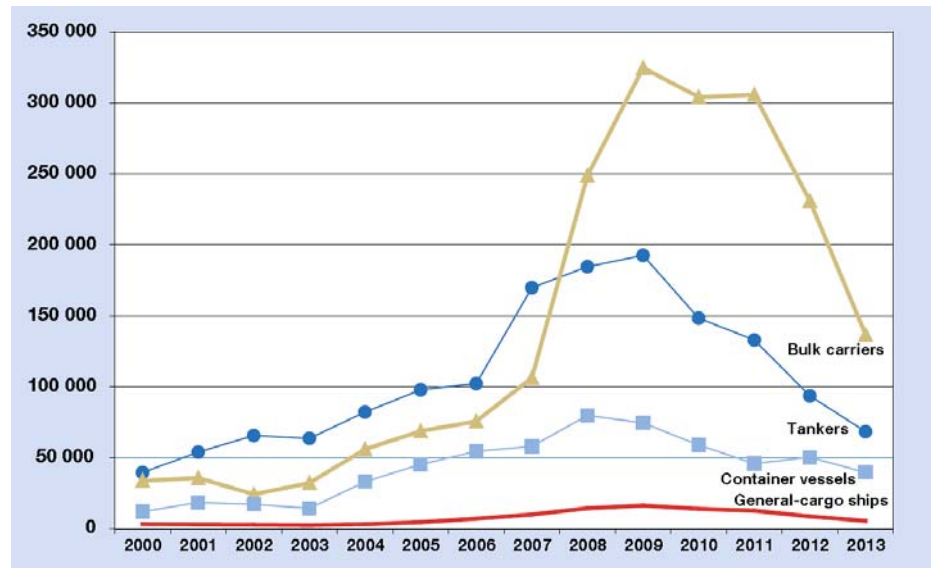


Main World Indices (1990 – 100%)



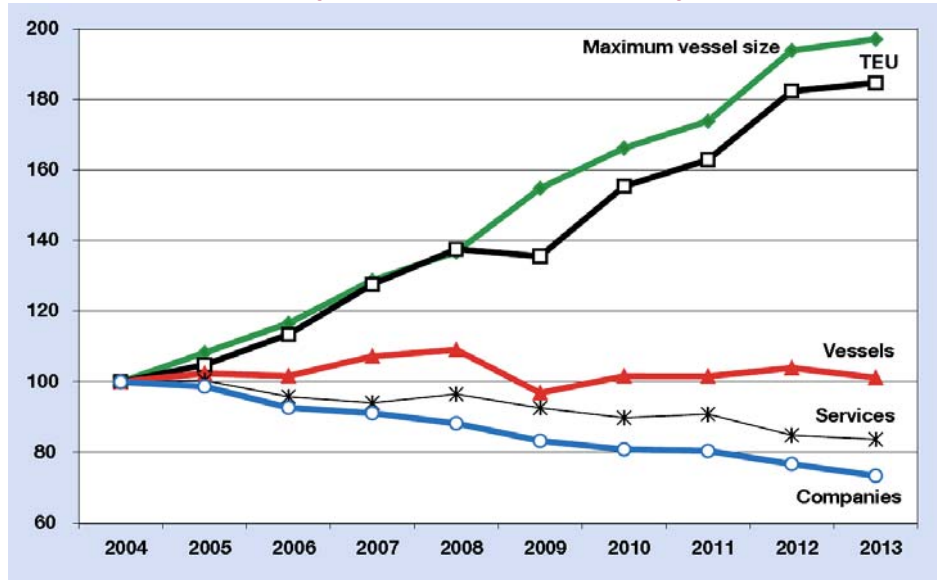
Sources: UNCTAD secretariat, on the basis of OECD Main Economic Indicators

World tonnage on order, 2000–2013 (Thousands of dwt)



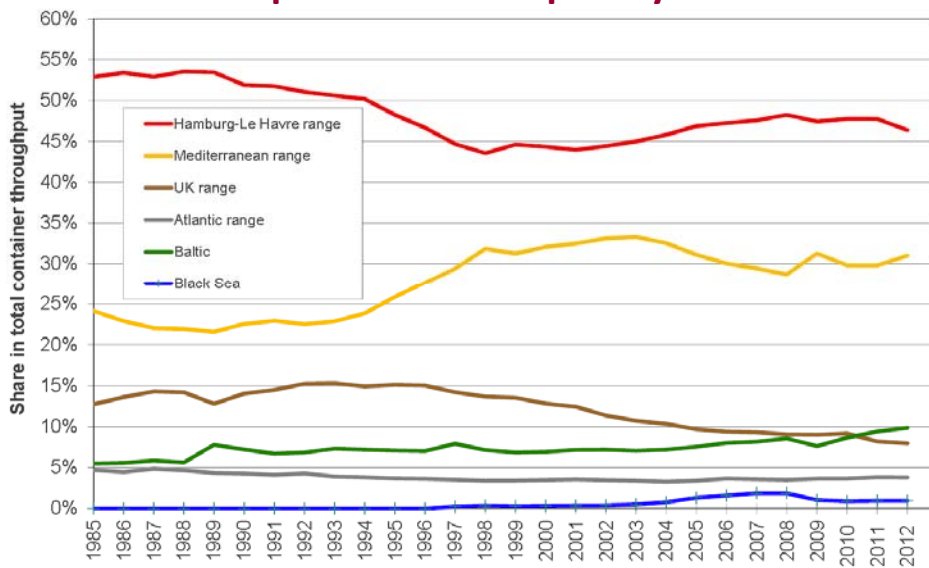
Sources: UNCTAD

Trends in container-ship fleet deployment (Index = 100 for 2004)



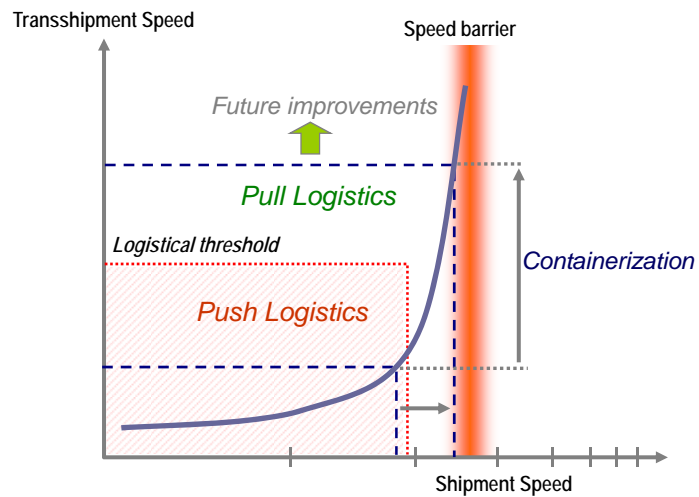
Sources: UNCTAD

Traffic shares of port ranges in the European container port system



Source: T. Notteboom (2013)

The Velocity of Freight: From Push to Pull Logistics



Source: Jean-Paul Rodrigue

CO-OMPETITION =

= Co-operation + competiton at all levels

- Countries (governmental)
- Local/municipal (ports, transport infrastructure,...)
- Organization (BPO, IMO, ..., associations)
- Sector
- Enterprises

The P3 Network

Box trio's mega vessel sharing agreement for the east-west trades

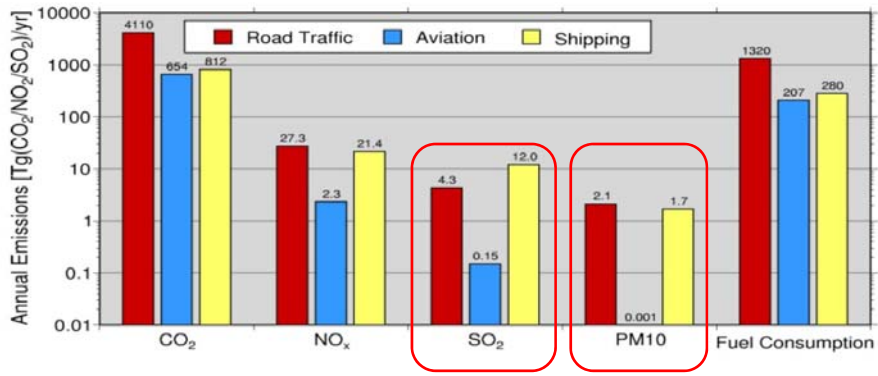


The P3 Alliance by TEU



 = 100,000 TEU

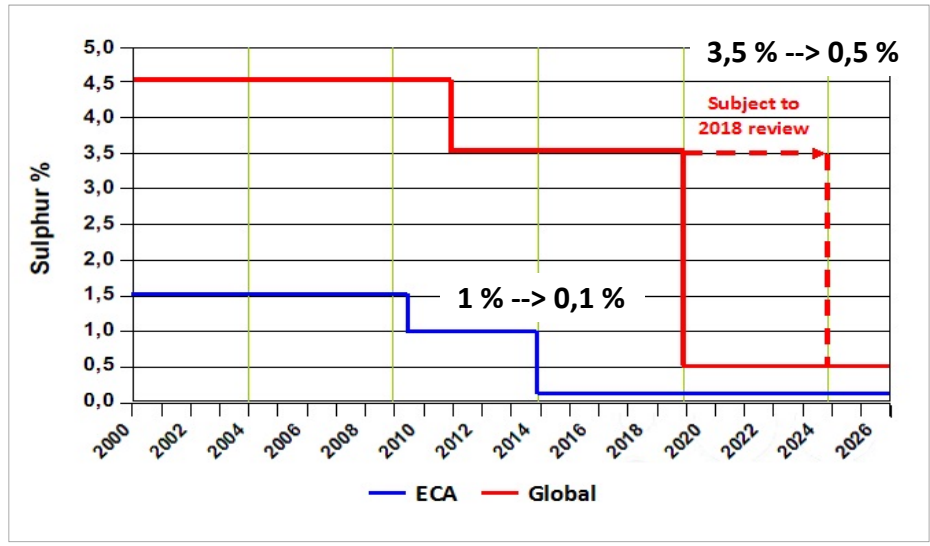
Why fuel of ships?




Emission Control Areas



Influence of "environmental" solutions IMO at the cost of sea transportation



For Official Use



Conférence Européenne des Ministres des Transports
European Conference of Ministers of Transport

CEMT/TMB(2007)8

19-Mar-2007

English - Or. English

EUROPEAN CONFERENCE OF MINISTERS OF TRANSPORT
TRANSPORT MANAGEMENT BOARD

**THE EXTENT OF AND OUTLOOK FOR CONGESTION IN INLAND,
MARITIME AND AIR TRANSPORT**

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The largest ships in service



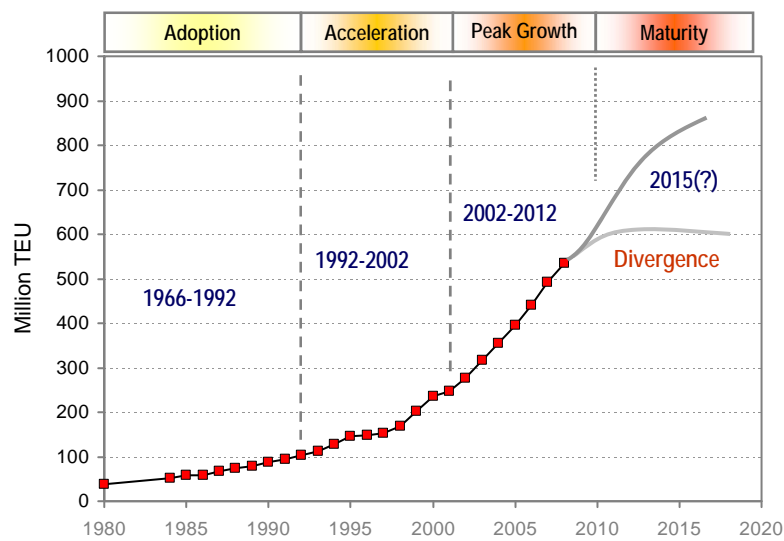
www.gizmodo.com/gadgets/gadgets/vehicles/oocl-shenzhen-worlds-largest-container-ship-111961.php

The largest ships in service, 3 built for Maersk in 2006, have a capacity of **14 500 TEU**.

The next step up in size will be the **Malaccamax** ship, carrying **18 000 TEU** with a displacement of 200 000 tons, 470m long, 60m wide, 16m draft, equipped with more than 100 MW power to reach 25 knots.

This is the limit without major restructuring of world trade routes, i.e. still larger vessels would not be able to pass either the Malacca straights or the Suez Canal.

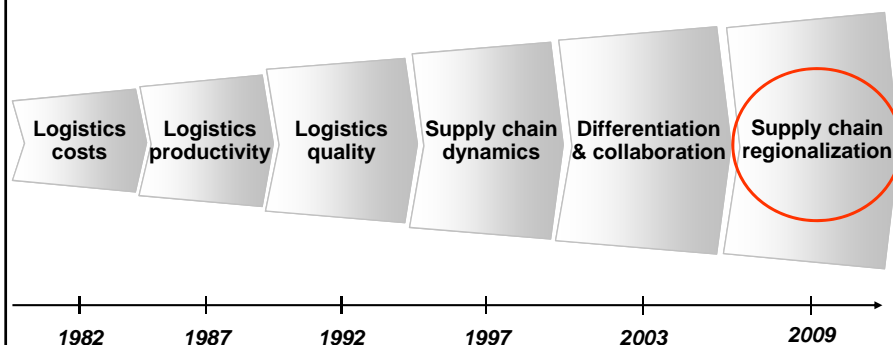
World Container Traffic. Reaching Peak Growth?



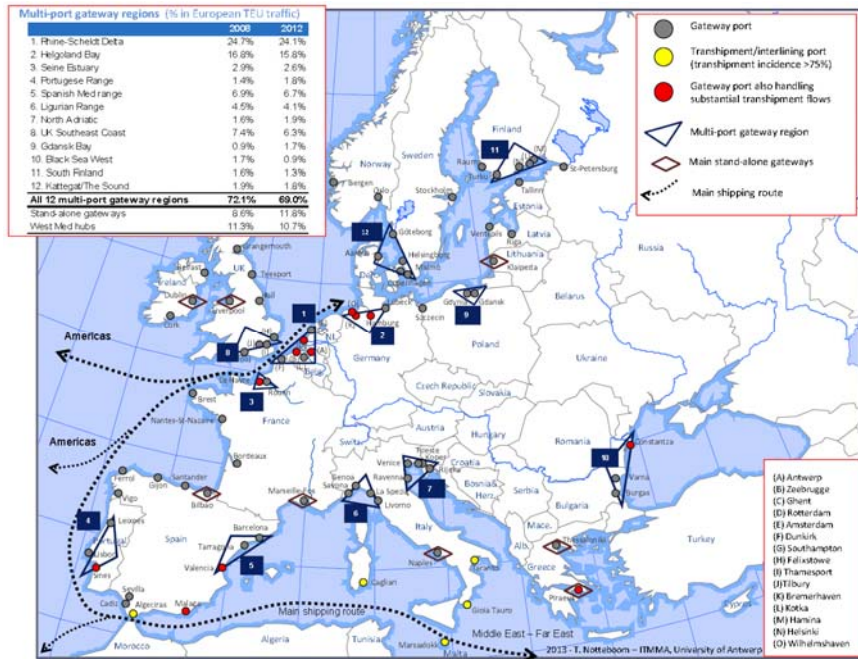
Source: Jean-Paul Rodrigue

Regionalization

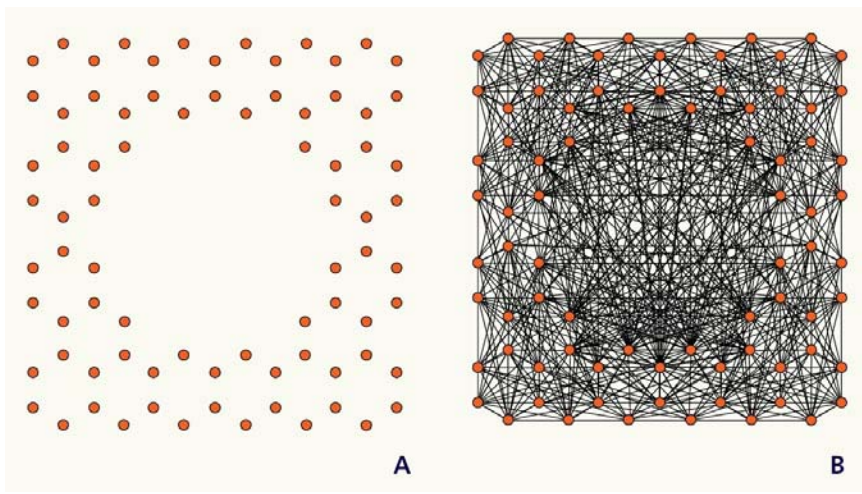
- Rebalancing of the global economy
- Repositioning strategies
- Terminalization (intermodal integration)
- Logistics poles (regional integration)



Multi-port gateway regions in the European container port system

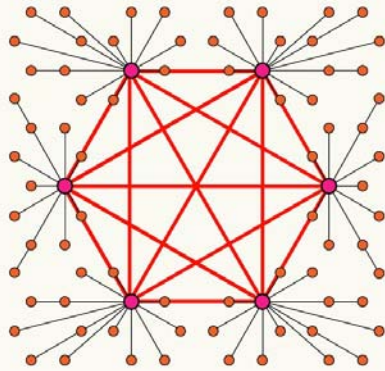


If all **80** points around the Baltic are to be connected with each other. It would require **3160** routes.

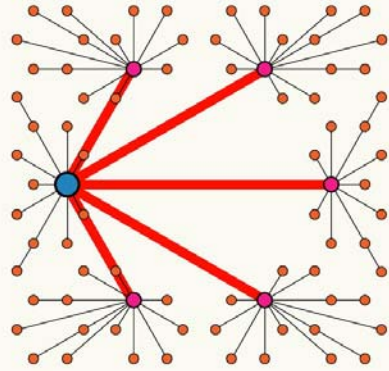


If **6** junctions are established, they can be connected with each other by means of **15** larger routes.

If a superjunction is established, they can be connected by means of **5** junctions and **1** superjunction with **5** superroutes.

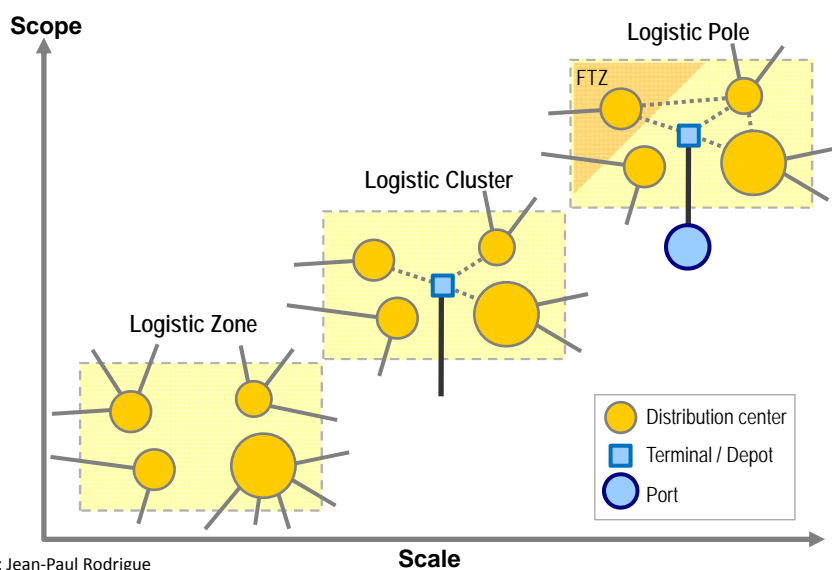


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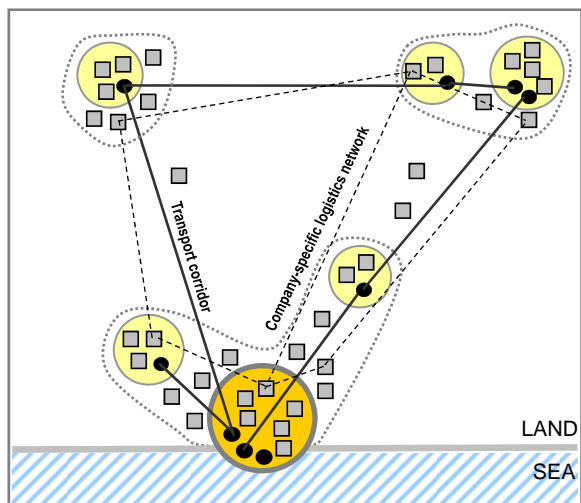
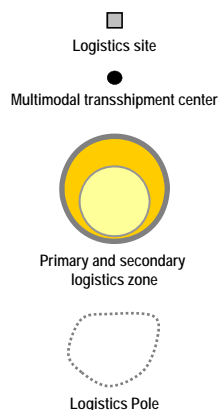
Functional Integration of Freight Clusters



Source: Jean-Paul Rodrigue

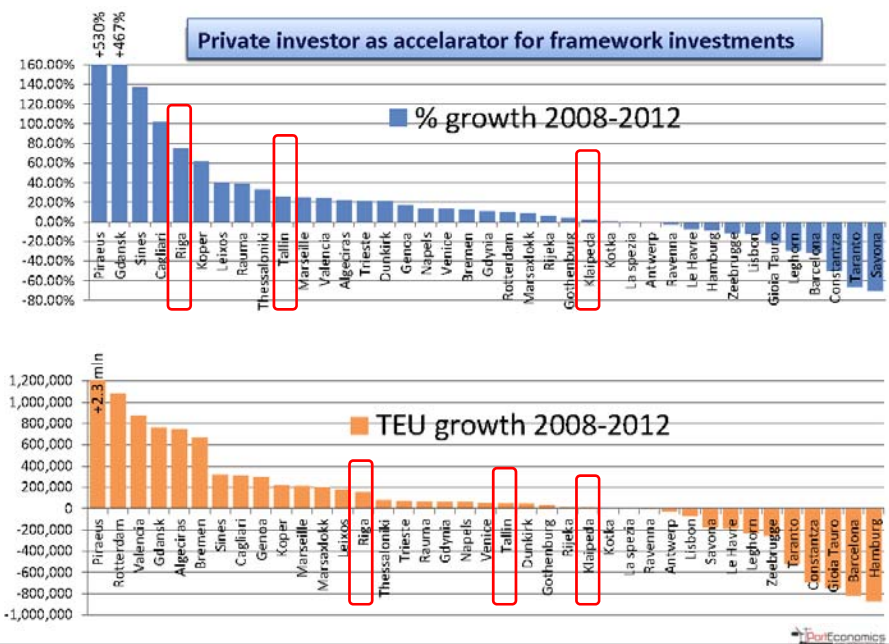
Scale

Port Regionalization and the Development of Logistics Poles



Source: Jean-Paul Rodrigue

Container Growth in Europe



Logistics Performance Index

2010

World Bank, 2010

Connecting to Compete

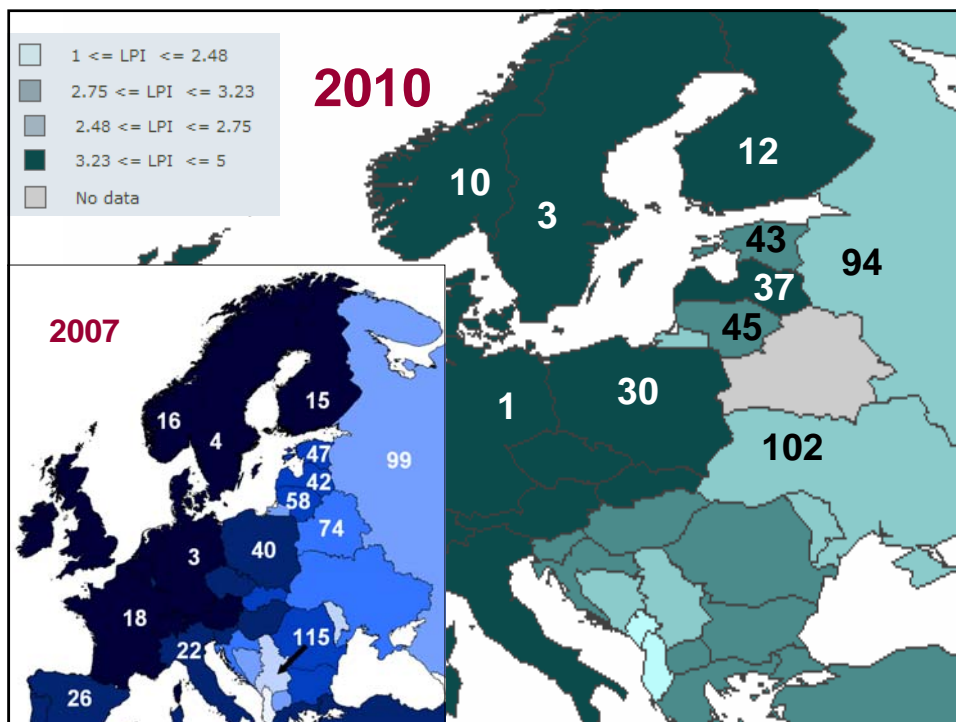
2010

Trade Logistics in the Global Economy



The Logistics Performance Index and Its Indicators

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Logistics Performance Index

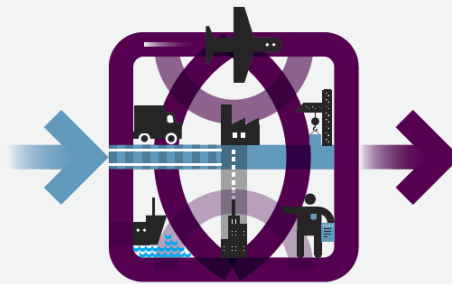
2012

World Bank, 2012

Connecting to Compete

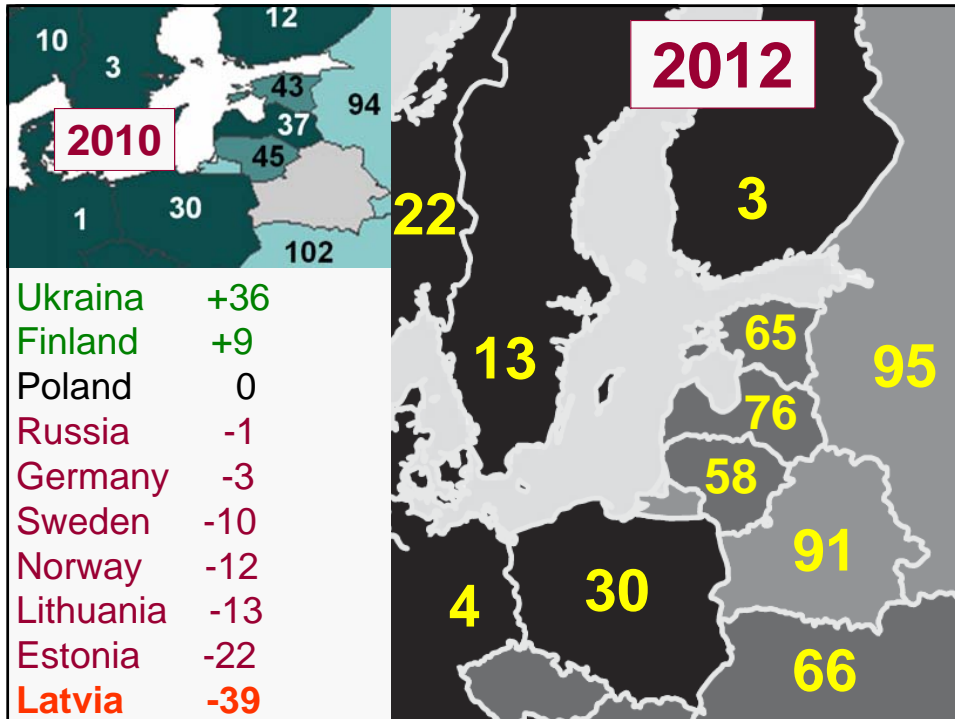
2012

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Logistics Performance Index

2014

World Bank, 2014

Connecting to Compete

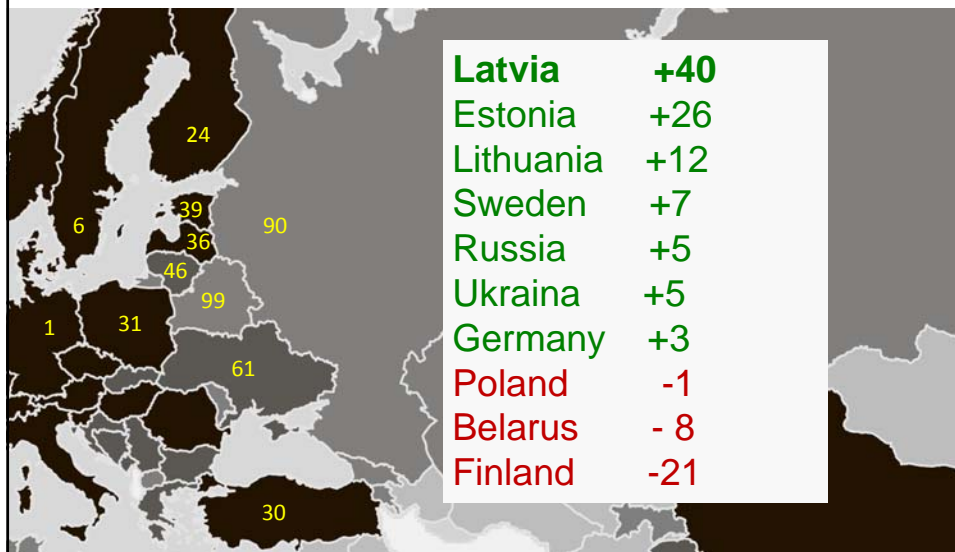
2014

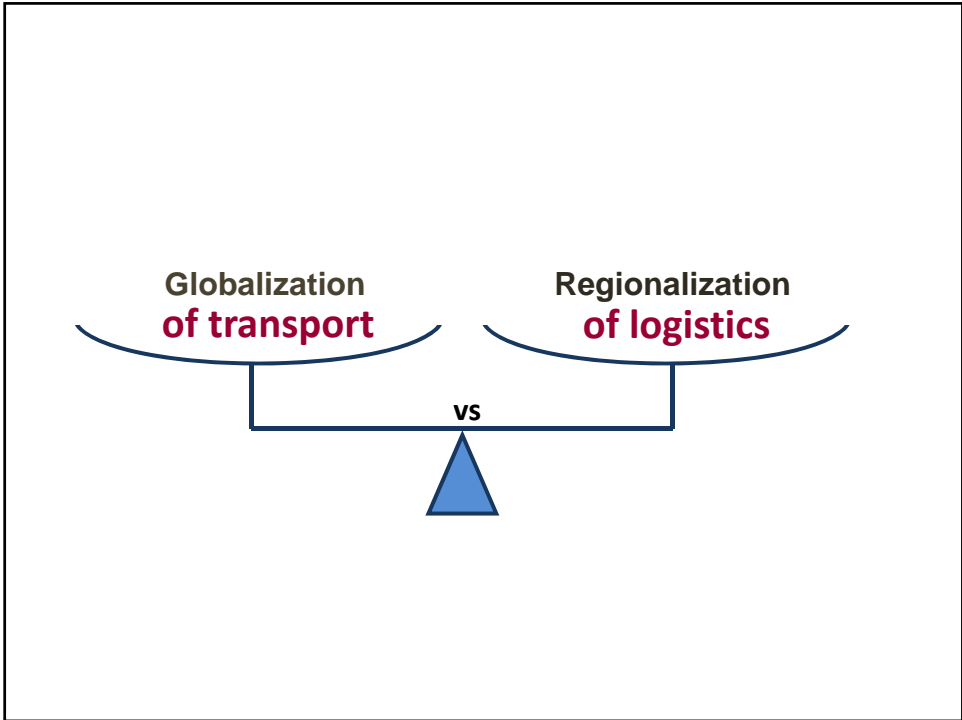
Trade Logistics in the Global Economy



The Logistics Performance Index and Its Indicators

Logistics Performance Index 2014





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