

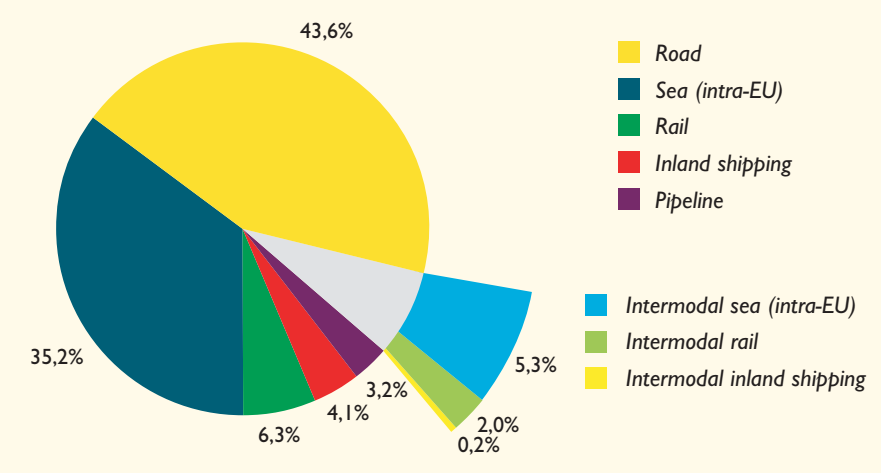


European ShortSea Network

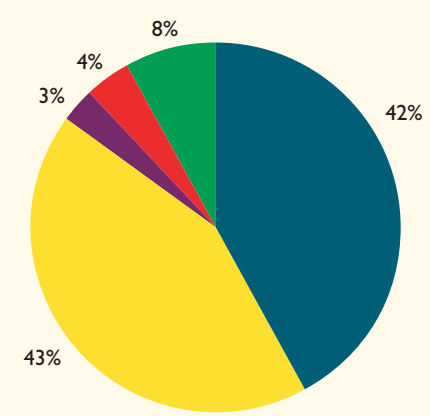
The growth of shortsea shipping since 1990...

The European Commission has published a number of recent statistics on the growth of shortsea shipping within the intra-European traffic flows.

Shares of intermodal transport in the total intra-EU transport, in ton/km, 1996

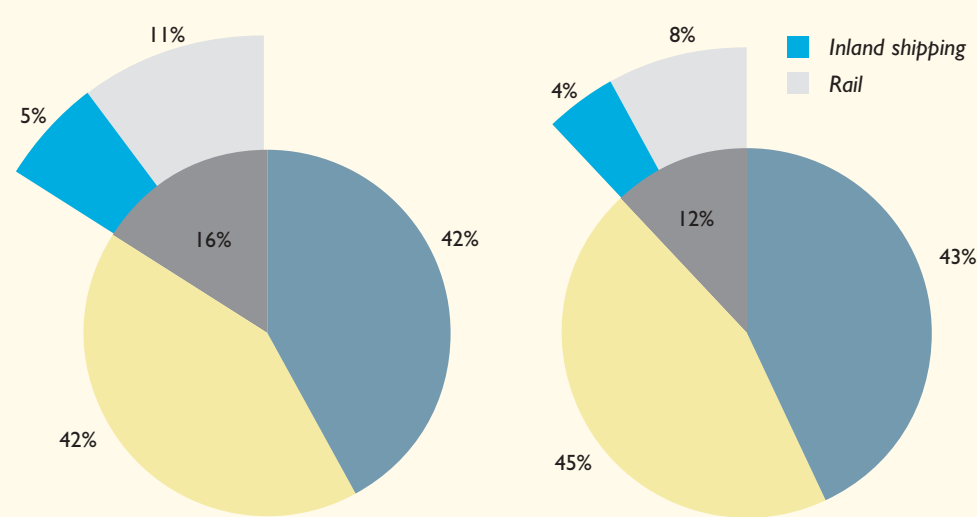


The annual growth of total intermodal transport in ton/km averaged 9.3% between 1990 and 1996
Source: EU DG VII

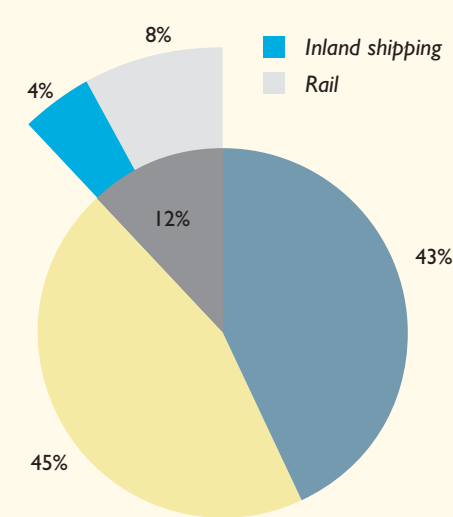


Traffic split of EU 15, in ton/km, 1997
Source: Eurostat 1999

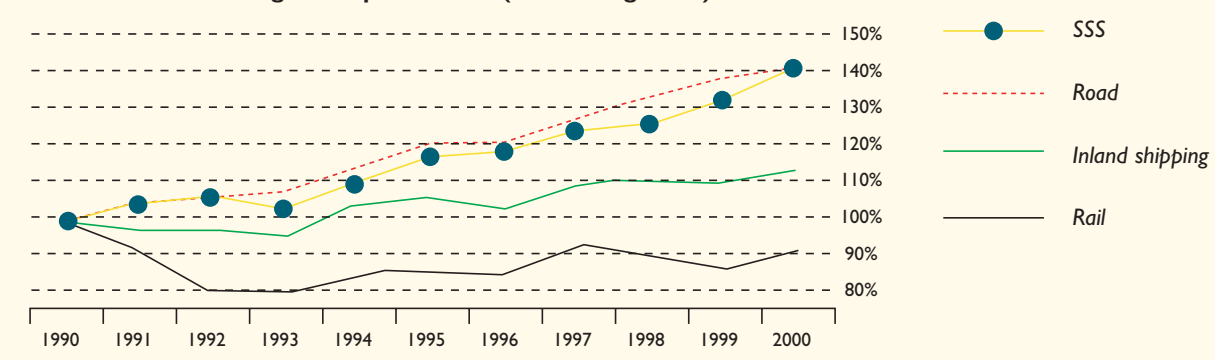
Share of cargo in 1990 (ton/km)



Estimated share of cargo in 2000 (ton/km)



Four cargo transport modes (ton/km % growth)



The databank for shortsea liner services

Via our website www.shortsea.be you can consult the various shortsea services, free of charge and on line. Choose your language, click on the ESN logo and then on 'search engines'. Select the country of departure (for instance Belgium), fill out the search engine and you will get all the information that has already been entered by the agents. Once you've made your choice, just click on the name of the agent to get his co-ordinates.



www.shortsea.be: consult information on shortsea services and agents, QUICKLY and FREE OF CHARGE.

MSC develops its intra-European and feeder services

The **Mediterranean Shipping Company (MSC)** is planning to further develop its shortsea capabilities, amongst others between Antwerp and **Spain/Portugal**. Also, there are growing opportunities towards Great Britain and Ireland. As from January 2003, the capacity of the ships will be increased from the current 560 TEU to 1050 and 1600 TEU.

The ports that will be served are (consecutively): Antwerp – Vigo – Leixoes – Lisbon – Cadiz – Valencia – Antwerp – Dublin – Belfast – Liverpool – Antwerp – Vigo...

Info: MSC Belgium, tel. +32-3-543 22 00.



Incoming steel cargo from Finland. Shipped by coaster, on-carriage by inland-navigation vessel. Read more about it in our next newsletter!



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Editorial

Once again we find ourselves at the end of another year. A year that, with all the activities around SSS that were organized, just sped by. We wish you a **happy holiday season** and a healthy and prosperous year 2003.

Meanwhile we have already reached the 7th edition of our newsletter. 2002 has been a very successful year. Over the past twelve months, many people have discovered the **added value that Short Sea Shipping may bring to their business**. This trend will undoubtedly continue in 2003. After all, SSS is the only transport mode that can keep up with the growth of road haulage.

Now that we have reached the foul and dark winter months again, we are taking you to warmer places in this newsletter. Indeed, for those who are interested, we have concocted **some articles on Turkey and Algeria**, which link up seamlessly with the recently published country special about Turkey.

We also have extensive domestic coverage with a varied offer of news snippets about our ports. And for our seasoned readers we have prepared an elaborate dish of pie charts and other statistical data. Finally, we also dwell upon the introduction of a German road tax for lorries in 2003.

Happy reading!



Rik Goetinck
Chairman SSS Working Group

The port of Ostend keeps growing

In the framework of shortsea traffic, the port of Ostend is a **strong growth** factor. The **ro-ro services** are doing very well, indeed (the first semester of 2002 showed a growth of more than 30% compared to the same period of 2001). It is hoped that by the end of 2002 the number of 200,000 or more units will be reached.

Another goods category that regularly gets a turn in Ostend is **project material**. Thus, for instance, large beer silos are regularly loaded into coasters bound for Russia, amongst others. In September, 2002, the tenth such cargo was shipped.

For more detailed data you can ask for our port fact sheet on Ostend!
Information: Port of Oostende, tel. + 32-59-34 07 11.



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Flemish buses to Algeria via shortsea

On October 21, 2002, 19 buses, including one articulated bus, of coach manufacturer Van Hool (Koningshooikt) were shipped to Algeria. The entire contract concerns the delivery of **64 buses** to Etusa, the state-owned public transport operator in Algiers. In the seventies, the same company already bought more than 700 buses from Van Hool.

The October shipment was the second in the series. The buses are transported by ms Telegma, owned by the CNAN shipping company, which has opted to carry out the shipments **only via a shortsea ro-ro service** from Antwerp to Algiers. The alternative, for instance by rail to Marseille and then by ferry, wasn't really taken into consideration.

Information: agent International Shipping Agencies (ISA), tel. +32-3-222 15 04.

Country special Turkey

The publication and distribution of our country special on Turkey has created a flood of response. We received, for instance, a positive reaction to our country special from the Flemish Economic Representative of **Flanders' Export** in Istanbul, Mrs. Katharina Desmet. However, she wanted to make **certain differentiations**, and we quote:

Page 2, last paragraph:

"Since the middle of the eighties, the economic policy has been altered drastically, with an emphasis on the liberalisation of the economy. On January 1, 1996, a customs union (for industrial products except iron, steel and agricultural produce) between the EU and Turkey came into force. Meanwhile, Turkey is also a candidate for full membership."

Page 3, last paragraph:

"A rigid fiscal and monetary policy, supported by a stand-by agreement with the International Monetary Fund, has since been pursued. After the strong negative growth in 2001, the Turkish economy has again witnessed a relatively strong growth rate in 2002. Due to the instability of Turkish macro-economics, the country, although clearly a growth market, doesn't attract as much foreign investment as it potentially could. Indeed, Turkey is consistently quoted among the dynamic emerging markets."

Page 6, first paragraph:

"The spectacular growth of exports to Turkey in 2000, was followed by a heavy downturn in 2001. That development reflects to a large extent the unstable economic growth of Turkey itself."



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Port of Brugge-Zeebrugge mission to Istanbul

On October 30, 2002, the Shortsea Promotion Office took part in a mission of the port of Brugge-Zeebrugge to Istanbul. Our country special on Turkey was distributed among the participants and met with general approval, both as far as the contents and the layout are concerned.

The importance of **shortsea shipping for the port of Brugge-Zeebrugge** was strongly emphasised, as were the planned investments in and extensions of the port. In the presentation, the Shortsea Promotion Centre Flanders (including its website) was mentioned, as was its role in the promotion of SSS.

Also presented was the service of **United European Car Carriers (UECC)** from Zeebrugge to Turkey, a ro-ro service which operates twice a month.

Contact: Zeebrugge Shipping en Bunkering, tel. +32-50-54 24 11, Jürgen De Fauw.



Turkey on the rise: a pick of other initiatives...



► **United Maritime Alliance** has become the agent for Turcon's weekly container service to Gemlik, Istanbul, Izmir and Mersin. Contact UMA, tel. +32-3-546 36 00.

► In December 2002 **Normed** has increased its number of sailings to Turkey from two to three per month. For that reason a brand-new vessel has been engaged, which can take both conventional cargo (steel products) and containers (agent Durot Shipping, tel. +32-3-202 03 03).

► **Anmar Line** has already deployed three conventional vessels from Antwerp to Izmir, Gemlik, Derince, Diliskelesi and Ambarli (Turkey) with a frequency of 2 sailings per month. The number of advertised ports has been extended with the Turkish port of Trabzon, as well as with Poti (agent Manta Agencies, tel. +32-3-216 27 27).

German road tax: a boost for shortsea?

According to the most recent information, the **German road tax** will be introduced in **August, 2003**. From then on, all lorries with a GVW of 12 tonnes and more will have to pay 0.15 euro for every kilometre effectively driven on the national road network. The driver or the owner will be considered to be the debtor of the tax, which will be automatically collected by an 'on-board unit' in the vehicle itself.

Some sources expect the **costs for road haulage** in Germany to rise by about 20%. On the other hand, Germany still maintains its Sunday driving ban on heavy vehicles. That is why hauliers are increasingly gathering information about the possibilities of ro-ro vessels to Poland, the Baltic States and Russia, since such ro-ro ships literally circumvent the problems...

Austria is planning to introduce a similar road tax (0.22 euro/km). With additional levies on certain routes over the Alps, the average total tax would even amount to 0.27 euro/km (source: De Lloyd), in which case it will certainly become worthwhile to look at **the shortsea option** for some of the North-South services...

Fish-oil shipments by shortsea tanker in the port of Ghent

In the middle of 2002, the port of Ghent attracted an unusual kind of traffic: a contract for an expected volume of 100,000 tonnes of fish oil per year, which is shipped in (a.o. from Peru) by sea-going tankers. The distribution, for which **Ghent will act as a hub**, will be carried out by coaster tankers to Norway, Scotland, Denmark,

France, Spain, Italy and Greece. For destinations to the Rhine area inland tankers will be used. The company Locachim, situated at the 'Grootdok', has the necessary pumping equipment at its disposal, as well as a number of heated storage tanks for temporary storage.

Info: Locachim, tel. +32-9-255 56 66.

Project cargo Willebroek – Mersin (Turkey)



On December 4, the ms 'Al Shaymaa' took on board some project cargo at quay 314, destined for Mersin. The cargo was designed by extraction De Smet and produced by Seghers. For logistical reasons, the option was to use, for the large and heavy pieces, a **combination** of delivery by **lighter** from Willebroek to Antwerp, followed by shipment to Mersin by **coaster/sea-going vessel**. The heaviest parts weighed in at 32 tonnes (14.40 x 3.85 x 4.80 m) and 45 tonnes (6.80 x 4.90 x 5.10 m) respectively. The forwarding was taken care of by SBTC-Sotramar, tel. + 32-3-240 17 41.

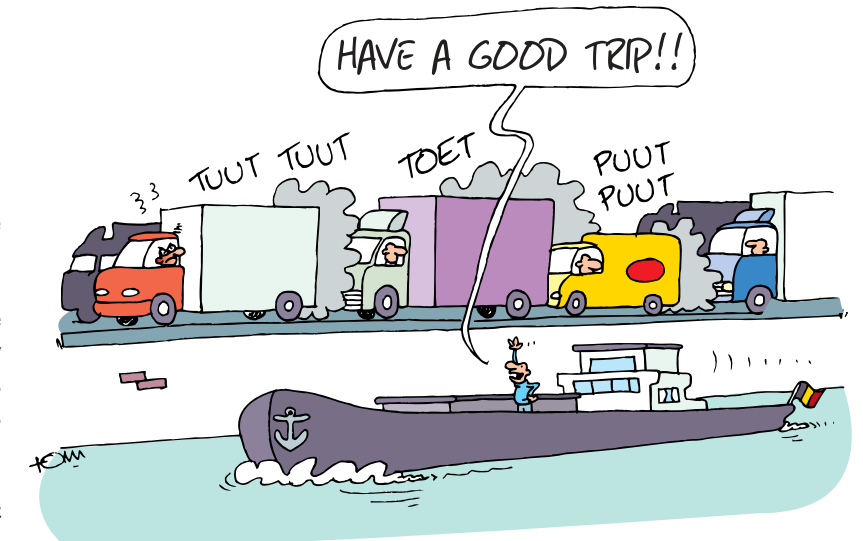


Infrastructure works around Antwerp

At a seminar in Antwerp on October 25, 2002, an overview was given of all the **infrastructure works that are necessary** to improve mobility in general and the accessibility of Antwerp in particular. During the works, which are planned for the coming years, traffic to and from Antwerp will hardly become any easier. The Antwerp ring road, for instance, will be tackled and, despite all accompanying measures, **severe traffic problems** are to be expected.

The accompanying measures also take into account the possibility of transport over the waterways. Apart from shipments to and from the port of Antwerp by coaster or inland navigation vessels, we also see possibilities in using shortsea links to divert part of the transit traffic of goods, which now uses the Antwerp ring road but doesn't call in at the port.

Those in charge of the infrastructure works have received a letter of the SSS Promotion Office, asking to include the possibilities of **shortsea for transit traffic** in their information campaigns.



SHORTSEA & INLAND NAVIGATION ESCAPE THE TRAFFIC JAM

European Shortsea Network: overture to the Baltic Ports Organisation (BPO)



Following a number of contacts, the European Shortsea Network (ESN) received an invitation for a joint **meeting with the Baltic Ports Organisation**. Present were representatives of the ports of Klaipeda, Stockholm, Gdansk, Rauma, Aarhus, Szczecin, Tallinn, Karlsham, Copenhagen-Malmö, Rostock, as well as of the Associated Danish Ports, the Swedish Maritime Administration and the Free Economic Zone of Gdynia.

On September 27, ESN was represented by Sweden, Finland, Denmark and the Flemish Shortsea Promotion Centre at the meeting in Copenhagen. This region - with Poland, the Baltic States and Russia - is very important to us and we are convinced that the planned

road tax in Germany (0.15 euro/km) will have an influence on the transport modes of that East-West traffic. According to recent reports, the introduction would take place in August 2003 and a number of hauliers is already examining the question.

During the meeting, the members of BPO clearly showed their interest in the **database of shortsea liner services** which has been developed by the ESN. How this can be put to work in practice (direct input, a link to BPO?) is a matter for further discussion, also within the ESN. Both in Lithuania and Estonia attempts have been made to start up a Shortsea Promotion Centre. ESN has promised practical aid and assistance.

