

RO-RO SHIPPING IN THE BSR

- from a DFDS perspective

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What are the trends?

- Unstable political climate in the Middle East and North Africa affecting oil prices on short term.
- Increased environmental restrictions affecting the shipping companies as well as the trucking companies.
- Further consolidation within the Roro/Ferry operators.
- Increased focus on costs saving measures – such as:
 - Reduced port stays (longer steaming).
 - Focus on the vessels operation & technology.
 - Changes in the route layouts.
 - Cutting supplier costs – including port and terminals.

IMO RESOLUTION 2015

July 1
Content of sulphur
restricted to 1% in SECA
area

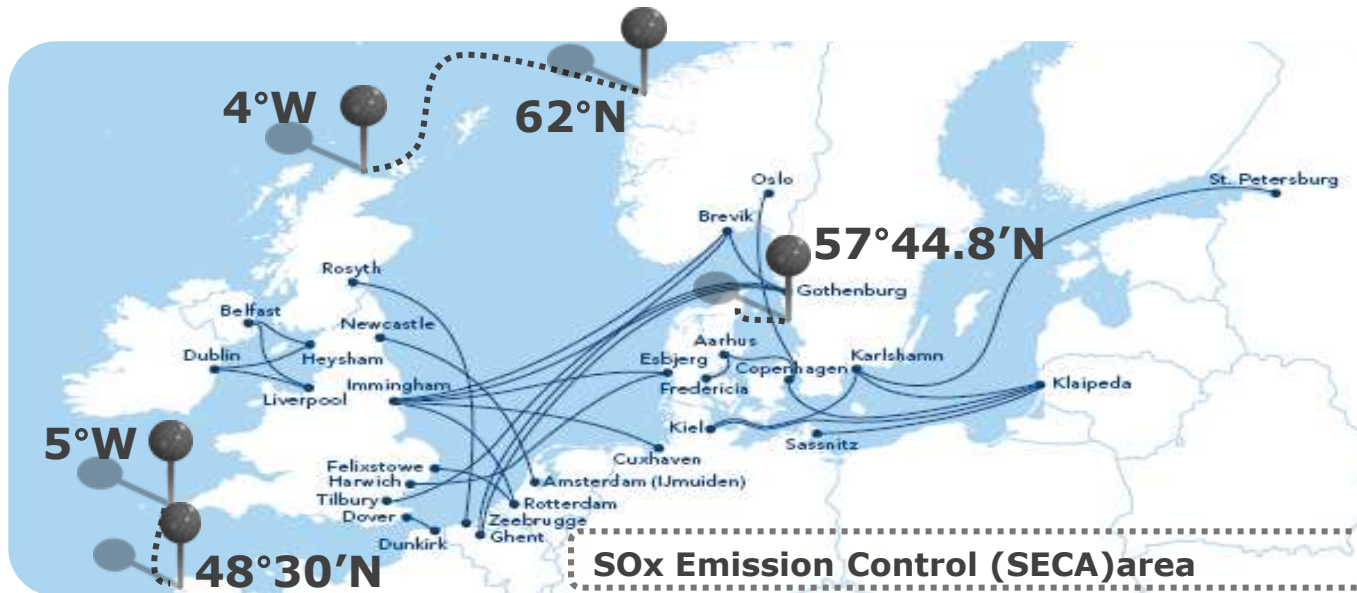
January 1st
Content of sulphur
restricted to 0,1% in
SECA area

January 1st
Content of sulphur
restricted 0.5% -
GLOBALLY

2010

2015

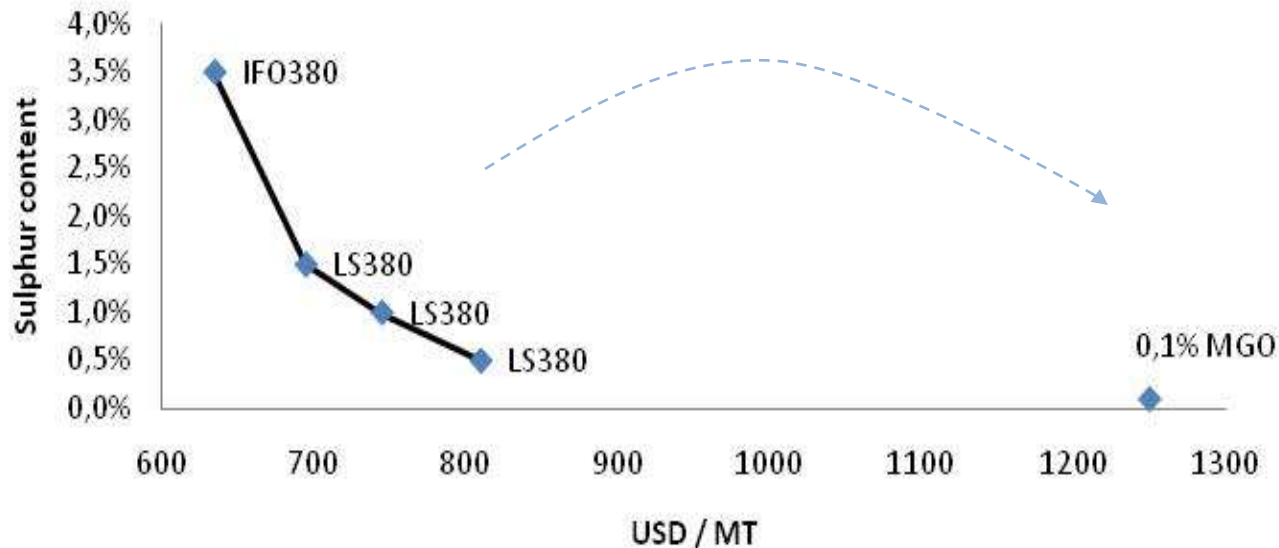
2020



Marpol, Annex VI will make fuel very expensive

Reduction from 0,5 % til 0,1 % has a small effect on the environment, but a huge on the price. We need time to develop solutions.

Sulphur content in Marine fuels and corresponding prices per June 2008



What are the impacts of the IMO regulations 2015?

Dramatically increased costs

Closing of ferry routes

Decrease in port & terminal turnover

Congestion and increased traffic on roads

WHAT COULD BE THE IMPACT OF AN INCREASE IN THE POLISH ROAD TOLL 1 July 2011?

Changes
in the
logistic
setups?

Increased
rate levels

Increase
not
covered
by the
market

Increased
prices for
end-
consumer

Changes
in the
route
networks?

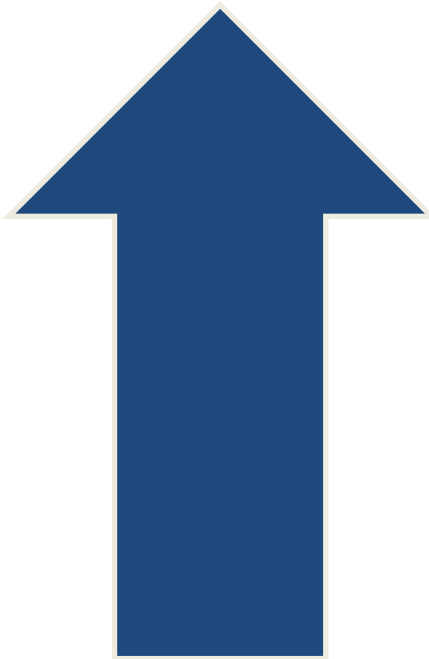
Where?

Future main hubs in the Baltic



- 2 alternatives needed
- Shortest entry to Russia via the ice free port Klaipeda
- Direct access to the Russian market via the non-congested port Ust Luga.

RUSSIA – “EMERGING MARKET”



Geographic location connecting East Asia & Europe

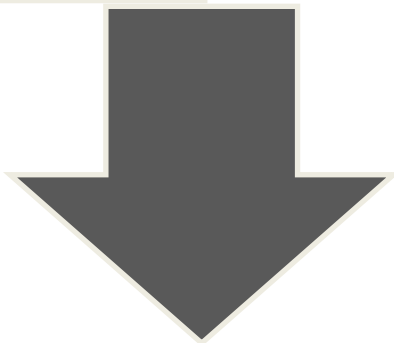
Introduction of port special economic zones

Railway development – cost-effective transportation options

Changing export structure

China and Russia interested in new “silk road”

Growing number of multinational logistics service providers



Vulnerable to oil market situations

Dependent on world’s economic situation

Complex border crossing procedures

THANK YOU FOR ATTENTION
Q & A