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Competitive Position of the Baltic States Ports

Jūlija Māsāne-Ose

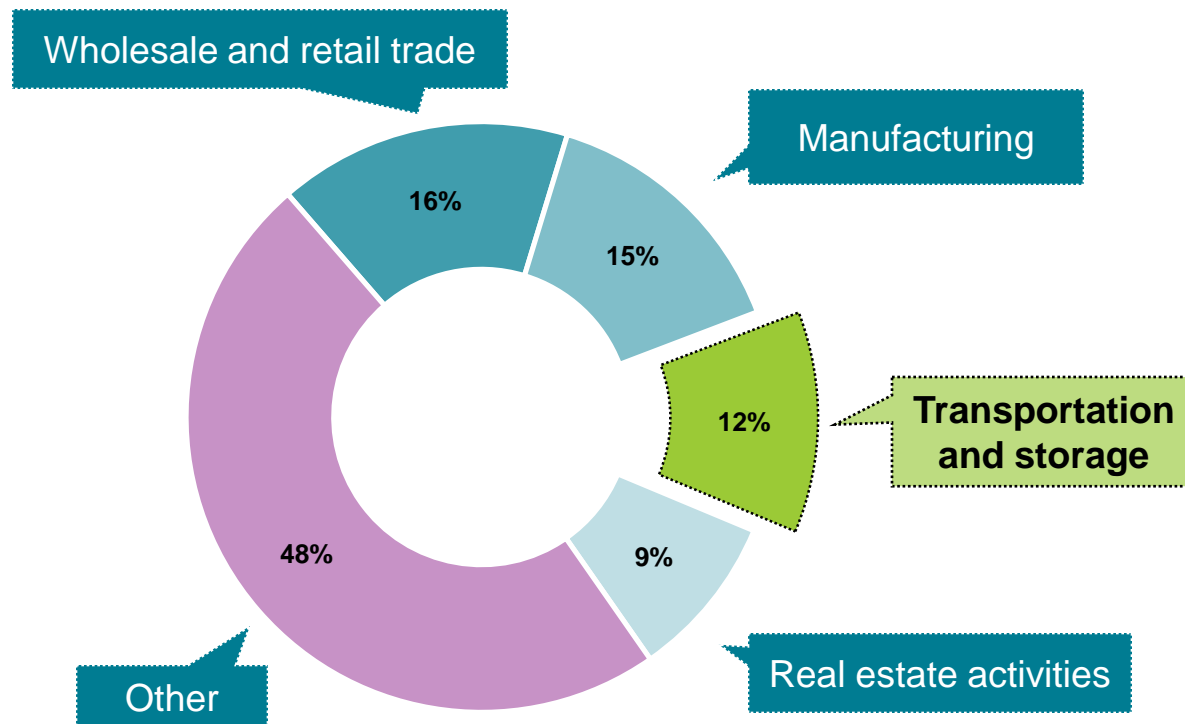
Associate Director

Transactions & Restructuring

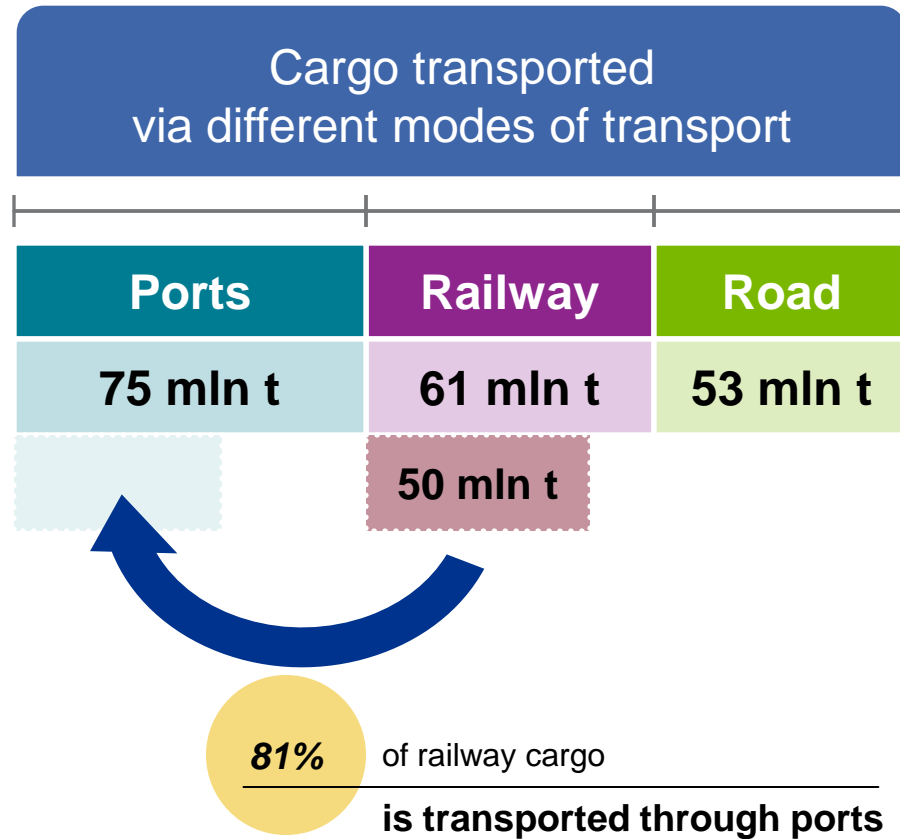


Transportation sector is a significant value adding sector in Latvia

Weight of value added by industries in Latvia, 2012

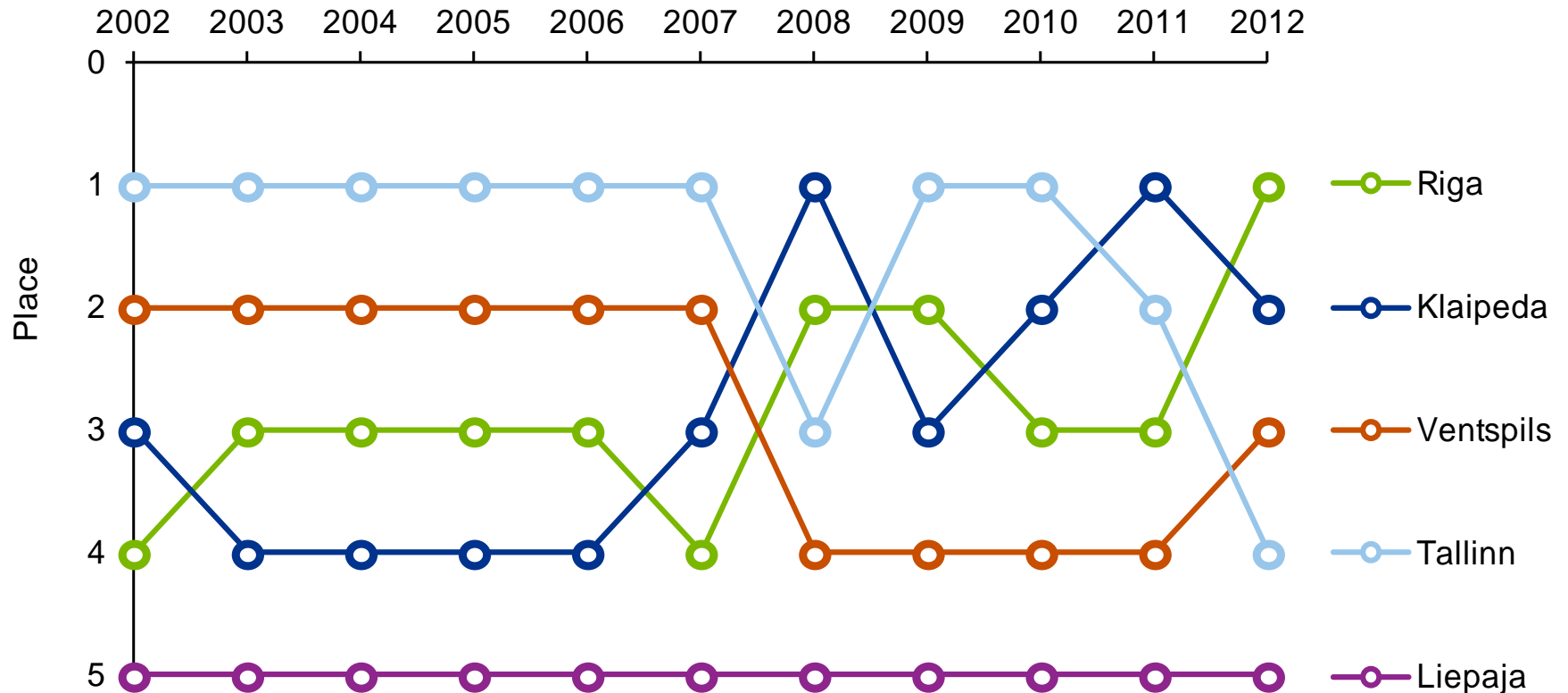


Maritime cargo is the cornerstone of transport and logistics in Latvia



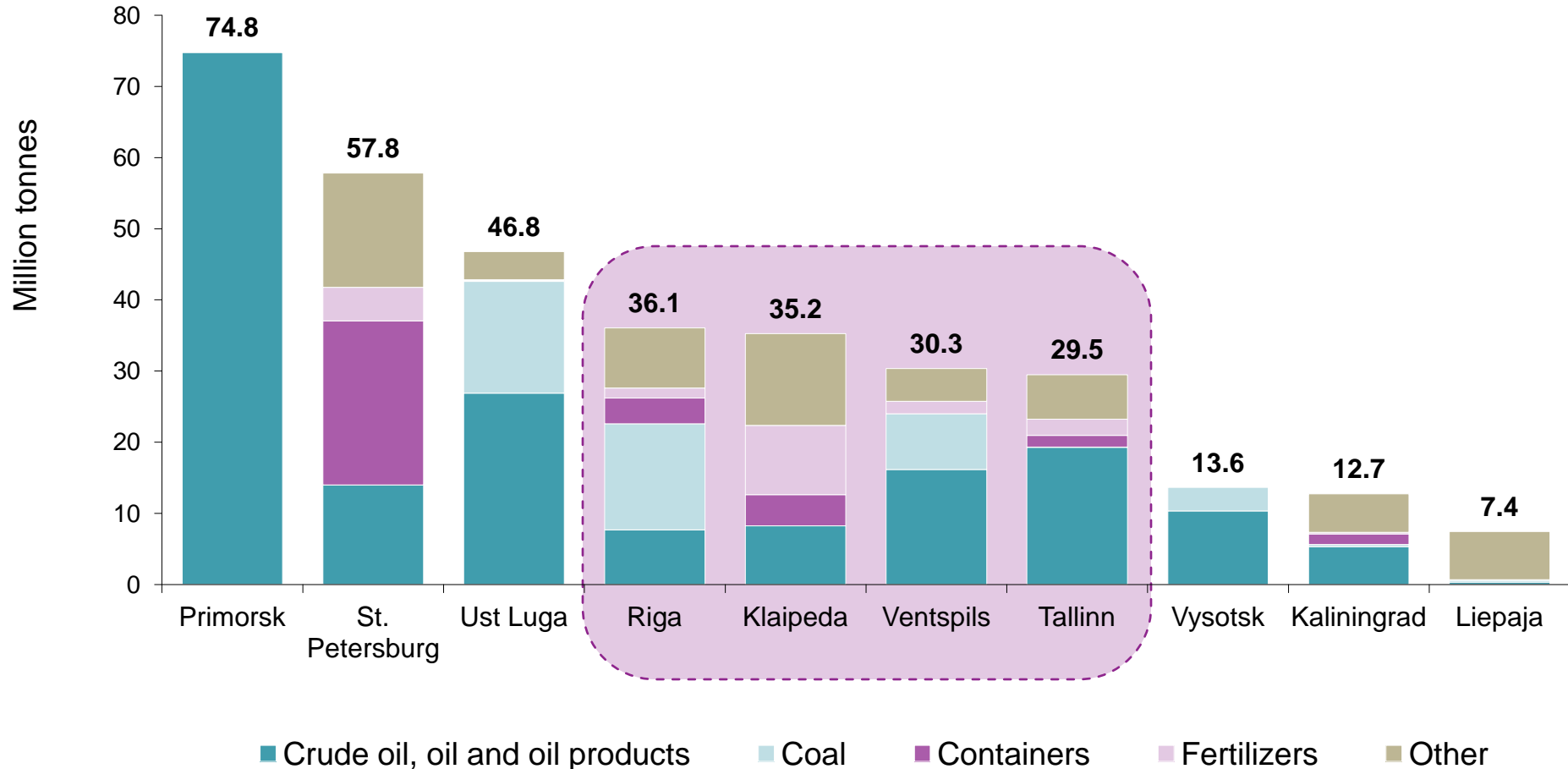
Overall ranking of Baltic States ports, 2002-2012

Ranking of Eastern Baltic ports by total cargo turnover, 2002-2012



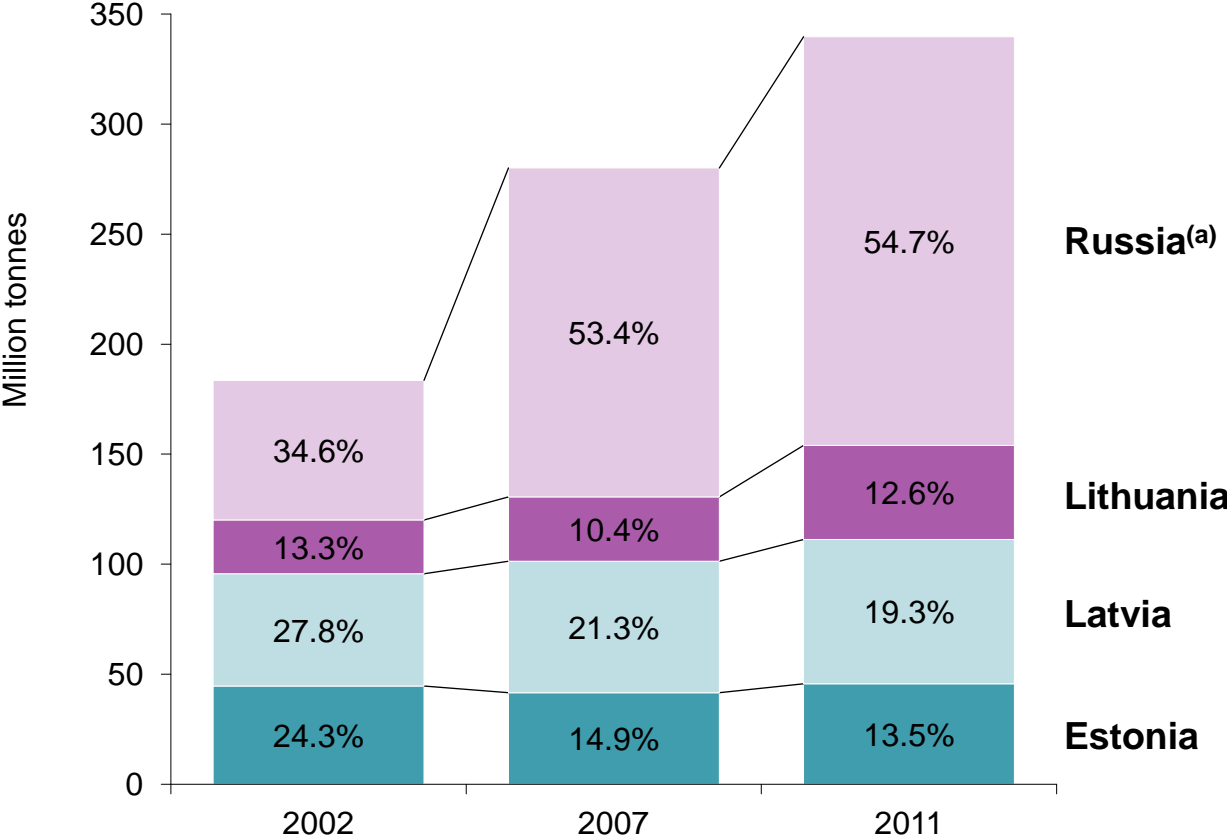
Competitive landscape of maritime cargo transportation in the Eastern Baltic (I)

Cargo handled at 10 largest ports on the Eastern Baltic in 2012



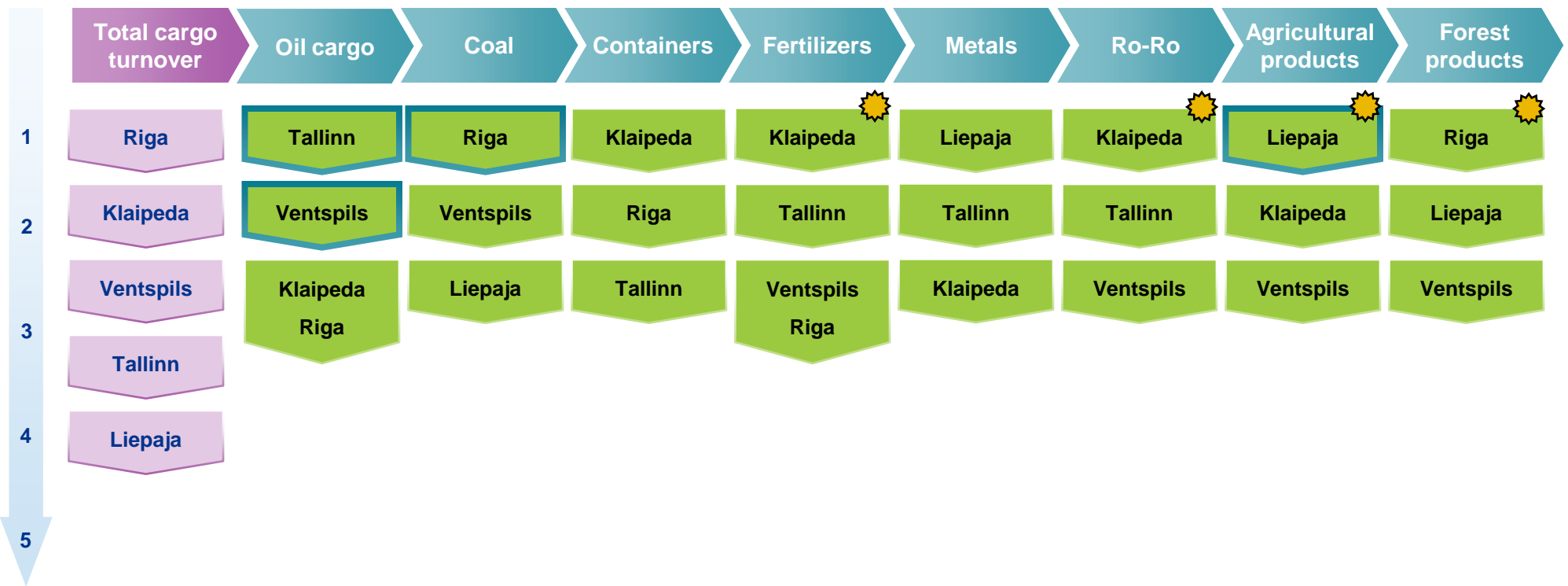
Competitive landscape of maritime cargo transportation in the Eastern Baltic (II)

Maritime freight market share with respect to East Baltic Sea region, 2002 - 2011

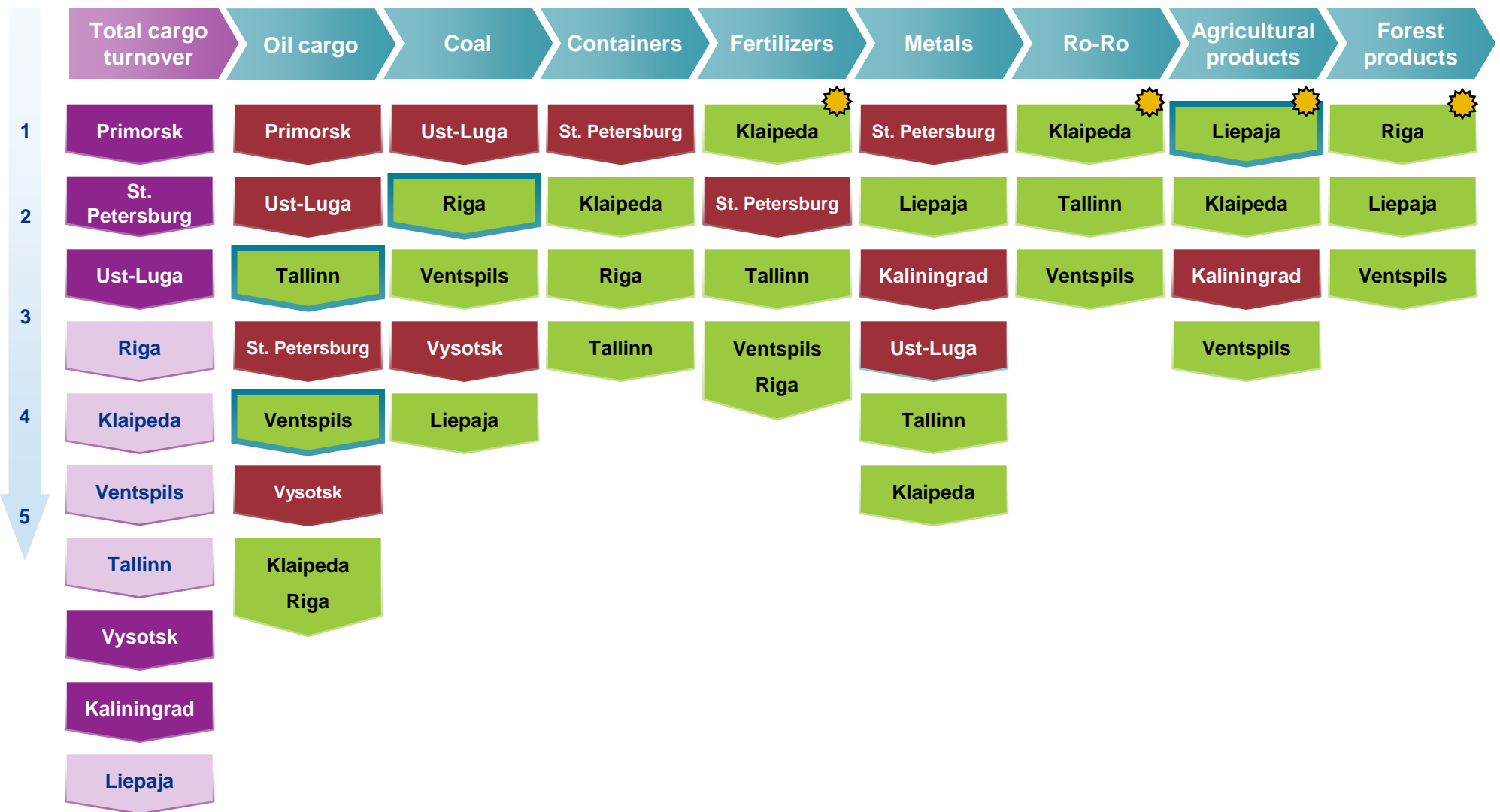


Notes: (a) Figures on Russia include only the Russian ports in the Baltic basin.

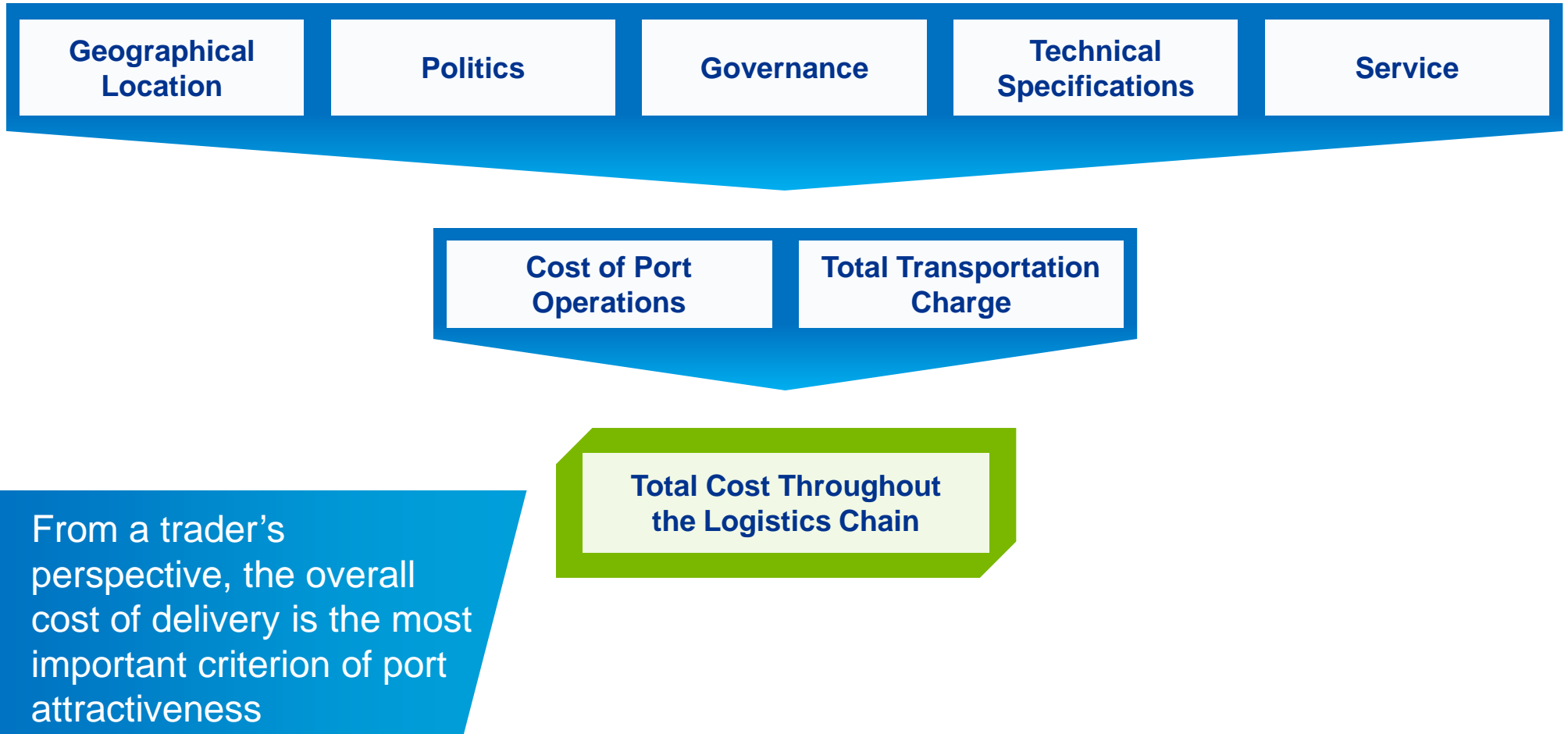
Ranking of ports of the Baltic States by volumes of cargo flows



Ranking of ports of the Baltic States by volumes of cargo flows



Factors Impacting Port Competitiveness – based on interviews



Governance

- Transparency of freeport activities
- Access to information
- Cooperation with port's authority
- Clear decision making
- Cooperation with railway infrastructure operators

Politics

- Open borders
- No trade limitations

Highlights by industry players

Development of Latvian ports would benefit if independent professionals are involved in ports governance

Industry players point out the lack of transparency in port governance in Latvia

Compared to other ports, governance in the port of Tallinn is more transparent, as highlighted by industry experts



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**Thank you for your
attention!**

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