

CONDITION AND PROSPECTS OF MARITIME FREIGHT TRANSPORTATIONS IN THE SOUTHERN ZONE OF THE RUSSIAN FAR EAST

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The author made an analysis of cargo turnover in the regional sea ports for the period of 2010-2011 as well as gave characteristic of transit potential and cargo base of the international transport corridor «West - East» toward the Asia-Pacific countries. The article also presents the prospects for transshipment of cargo in the Russian Far East seaports in conditions of growing competitiveness of such foreign sea ports as ones of China, Japan and South Korea. The author shows the role and importance of the Transsib railways in the growth of cargo turnover of the Russian Far East sea ports and identifies issues to improve the efficiency of the ports operations.

Keywords: seaports, cargo flows, freight traffic, cargo base, transit potential, Asia-Pacific region, Trans-Siberian Railway.

1. Maritime ports are one of the key elements of national transport complex ensuring the connection of various kinds of transport between each other into a single complex. 60% of the Russian foreign trade cargo turnover is carried out with its participation. So, for example, the Russian maritime ports cargo turnover for 2011 grew by 1.8 % in comparison with the previous year and made 535.5 million tons [5]. Cargo transportation volume via the Russian seaports increased by 1.7% for that period, and the foreign trade one did by 3.6 %, and cargo throughput via the Russian seaports increased by 1.4 % in comparison

with the analogous period only for 9 months of 2011 and made 398.96 million tons including that of the dry cargo, namely, 171.80 million tons (+8.4%) and that of the liquid one of 227.16 million tons (-3.4%) [6]. In total for the period from 2000 to 2011 cargo transshipment volume increased by 2.5 times in 64 ports of the country and exceeded the total cargo transshipment volume of all seaports of the former Soviet Union. In addition, the share of Russian cargo transshipment in ports of bordering countries decreased from 27% in 2000 to 17.8% in 2010 [1-3, 6-7 and calculations according to the mentioned sources].

2. In the near future the cargo flows in Russia will be gradually redirected to the Eastern direction due to adoption by the Government of Russia of a wide range of documents concerning accelerated social and economical development of Siberia and the Far East. The strengthening of economic relations between Russia and rapidly growing Asia-Pacific economies will also facilitate this tendency. As a result, if in 2011 the share of maritime ports of Far Eastern Region amounted to 19.6% of the total Russian cargo transshipment, by 2030 it might grow to 23.8% (basic scenario) – 22.7% (expert scenario). In total, by 2030 the cargo base of Pacific coast Russian ports will be provided with mineral, raw and forest resources of Eastern Siberia and Far East and also with the functioning of transportation corridor ‘East-West’ (first of all, of containers). By 2030 the increase of demand for the cargo transshipment is forecasted in the Far Eastern direction up to the level of 234.1 million tons according to basic scenario and up to 292.4 million tons by the expert one [6].

3. Maritime ports in Arctic, Baltic, Black Sea-Azov, Caspian and Far Eastern Regions are the key elements of Russian transportation system and entry points of Pan-European and Euro-Asian international transportation corridors. However, at present, despite the geographic advantages, Russia is positioned only in the second dozen of countries providing the export of transport services (less than 1% of gross trade turnover between countries of Europe and Asia). This makes about 5% of transit potential of the country. If we get even 5% of the total transit volume in Euro-Asian communication it will ensure the growth of annual income of Russian transport industry and related industries for 2-3 billion US dollars. At the same time it is necessary to take into

account that trade volumes between Europe and Asia amount for 600 billion US dollars per year. 10-15% or approximately 60-90 billion dollars of this flow are naturally “attracted” to Russian transport communications. Realization of even this share of transit potential can give an additional impulse for Russian Federation to carry out large-scale projects of modernization and development of transport infrastructure, creation of additional jobs, a considerable multiplicative effect in other branches of economic and social sphere. Additional gross national income received by means of Russian transit potential realization in Euro-Asian direction, according to forecast evaluation, can amount to 350 billion rubles by 2015 [2].

The project of development of the Great Northern Sea Route that is significantly shorter than sea routes via Suez and Panama Canal has enormous and highly promising prospects for the whole country and, primarily, for the Russian Far East. Therefore, the Russian leadership has set major goals in connection with large-scale exploitation of the Arctic zone including intensification of maritime and river transport flows.

4. According to RF Ministry of Transport data, the cargo flow volume in the Far East area has exceeded indexes of the crisis period by all the kinds of transport and demonstrates a steady tendency for growth. The cargo flow forecast, with a view to 2020, further predicts its steady growth by all the kinds of transport, especially for the maritime and railway ones. In particular, the ‘Strategy of Maritime Port Infrastructure Development of Russia up to 2030’ supposes increase of demand for liquid cargo transshipment by up to 70 million tons by 2020 already, and this is 25% more than in 2011, for the bulk cargo up to 90 million tons (the growth of approximately 100%), for the general and container cargo up to 17 and 19 million tons (the growth of more than 125%). In total the cargo base of Far East by 2020 is estimated as more than 200 million tons that is about 60% more than in 2011 (125 million tons) [3, 6].

The main elements of transportation nodes in Far Eastern region are, as before, maritime ports and railways which share constitutes more than 90% of combined regional turnover. A network of highways, air transport and inland water transport go after the leaders. Their share is considerably lower but the importance is not less essential as they provide social and economic stability in remote territories of the vast region.

5. Taking into account that Ministry of Economic Development of Russia forecasts an outrunning economic growth in developing countries (first of all, China and India - economics of these countries may make about a quarter by 2020 and about third part of the world GDP by 2030), throughput of maritime ports of Pacific Russia may grow up by 30% by 2020 and double by 2030 [6]. But, to accomplish this goal it is necessary to improve competitiveness of maritime ports of the Far East and maritime transportation services in this region, and first of all, to increase the speed of loading and unloading, to reduce time when the vessel and railway cars are in the port, to raise technological effectiveness of cargo operations, to shorten the customs clearing time, etc. Now, these indexes are significantly lower than the average world ones and fall far behind the leading Asian seaports- Hong Kong, Dalian, Qingdao, Shanghai, Pusan, Nagoya, Niigata, etc.

Another problem is the limited capabilities of Trans Siberian railway. More than 80% of regional turnover and about 40% of domestic passenger turnover fall on its share. Up to 95 million tons of various cargoes are carried along the selected sections of Trans Siberian line annually, and from 12 to 20 million tons of cargoes, the lion's share of which fall on coal, oil and oil products, are carried by Baikal-Amur Railway (BAM) annually. More than 75% of the railway cargo flow are performed together with the main ports in Khabarovsk and Primorsky Krai. At the same time such Far Eastern ports as Vostochny, Nakhodka, Vladivostok, Vanino and De-Kastri are the main elements of railway and maritime transportation nodes. And the ferry service Vanino-Kholmsk (combined railway – maritime transportation) provides transshipment of more than 90% cargoes coming to and from the Sakhalin Island [1].

Actually the whole BAM Eastern part from the Khani station to Komsomolsk-on-Amur and further to Sovetskaya Gavan including Kuznetsovsky Tunnel on the Komsomolsk-on-Amur –Vanino section is the main barrier limiting its perspective cargo flows. Meanwhile, traffic volume on the approaches to Komsomolsky railway node is forecasted to grow up 3.3 times by 2015, and 4.5 times by 2020. According to evaluations, similar situation will be on the approaches to the ports of Vanino-Sovgavan transport node where the cargo flow will increase by 3-4

times. As for the ports of Primorye, here the volume of transshipment of all the kinds of the cargo will make more than 91 million tons by 2015, and more than 100 million tons by 2020 [1], that will require the fundamental reconstruction of the Eastern part of Trans Siberian line and BAM.

6. Analysis of the cargo flow in trade with Asia-Pacific countries shows that according to data as of 2011, 65% of export cargo physical volume are carried via ports of Pacific Region, and about 13% are transported via Russian-Chinese border. Therefore quite concrete and understandable tasks of modernization of mainline export-oriented transport infrastructure are set: de-bottlenecking, development of infrastructure in accordance with the future dynamics of the cargo flows, and, certainly, construction of new access ways to port terminals.

As for import, the situation is much more complicated: less than a third part of total Russian import from Asia-Pacific nations is carried via ports of Pacific Region, about one fourth is delivered to Russia via Russian ports in the Baltic Sea, and approximately 10% are done via European ports. It means that we still can not attract not only transit cargoes but are unable to fully provide the delivery of our own cargoes with necessary transport infrastructure and the service level. It is obvious that in this case the build-up of a serious transit potential between APEC-EU nations is necessary in addition to the efforts to improve transport infrastructure for export - import trade with Asia-Pacific economies. Considerable and long-term investments are required both in the first and in the second cases. Experts' calculations show that if we can not provide adequate capital investments, particularly into development of regional maritime and railway transport systems, more than 30 million tons of cargo will not be exported in 2015. As a result, total annual loss for the country budget will make 18 billion rubles. [1, 6].

Finally, it is necessary to point out that at present the development of regional transport infrastructure is carried out within the framework of principal strategic documents – ‘Strategy of Social and Economic Development of Far East and Baikal Region for the Period until 2025’, ‘Strategy of Social and Economic Development of Siberia up to 2020’, ‘Transport Strategy up to 2030’ and others. The main instrument of realization of these strategies are Federal Target Programs ‘Economic

and Social Development of the Far East and Trans-Baikal Region up to 2013’, and also ‘Development of Transport System of Russia up to 2015’.

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