

Port of Tallinn

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PORT OF TALLINN

The Port of Good News

Port of Tallinn
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Estonia in a Nutshell

Estonia is a small yet forward-thinking country tucked into the north-east corner of Europe. Considered one of the **most advanced** digital societies in the world, ingenious Estonians are pathfinders, having built an efficient, secure and transparent ecosystem that saves time and money.

The capital city Tallinn is famous for its UNESCO World Heritage **Old Town** with unique well-preserved 13th to 16th century architecture. No other place in the world captures the feeling of the medieval era guite like it.

Republic of Estonia	45,227 km² total area	inhabitants 1,3 million	language Estonian	member of EU, NATO, WTO, (
	islands and islate	GDP por Capita	S. INVONES .	canital

★ Estonians are fond of their culture and tradition. The famous **song festival tradition**, listed in UNESCOs Intangible Cultural Heritage, started in 1869.

2.222

- rorests cover over half of Estonian territory. More than 40% of them belong to the state and are certified as organic collection areas.
- 🛎 Estonia's export of goods and services exceeds 85% of its GDP.





A unique geographical position

Located on the east coast of the Baltic Sea, Estonia has an ideal position for cargo transshipment between both the East and West. North and South.

	72 hr 48 h 24/h / Friance
	Suesa Stona
ivery time	Market size (inhabitants)
h	90 million UK Germany Poland Ukraine
h	100 million
h	450 million France
	Romania

Regular sea connections

There are frequent scheduled passenger and cargo ferry links from Port of Tallinn's harbours to the Baltic Sea as well as the North Sea. Both feeder services and ocean-going vessels are hosted.



In terms of density and quality, the Estonian network of roads can be compared to that of the Nordic countries.

Port of Tallinn has excellent hinterland connections that are well-integrated into the road and rail network with links heading East, West and South through Estonia.

Main routes connect Estonia with Russia (St. Petersburg region and Moscow) in the east and with Latvia in the south. Via Baltica connects Central and Northern Europe with the Baltics.





Port of Tallinn

Port of Tallinn operates as an intermodal hub, handling passengers as well as various cargo on a daily basis. Being **the biggest port authority in Estonia** and an active player in the **Baltic Sea Region**, Port of Tallinn's **strategic goal** is to develop the competitiveness of Estonia as a maritime country.

Port of Tallinn's activities are mainly divided between the following areas:

- o Passengers
- O Cargo
- Shipping
- O Real Estate

Port of Tallinn is listed on Nasdaq Tallinn SE since June 13, 2018. Shareholders include:

- 67% Republic of Estonia
- 33% Investment funds, pension funds, private investors

Our **mission** is to become **the most innovative port on the shores of the Baltic Sea** by offering customers the best environment and development opportunities.

In striving towards this goal, we value **openness**, **smartness** and **trustworthiness**, keeping in mind the interest and well-being of our stakeholders.

In addition to highly valuing **safety** and **security**, we also deeply care about our **environment** and thus pursue environmental policies.











OLD CITY HARBOUR

Estonia's biggest tourism gateway and one of the busiest passenger harbours in the Baltic Sea region. Also handles Ro-Ro.

PALDISKI SOUTH HARBOUR

The cargo harbour of Port of Tallinn focuses on handling Estonian export, import and transit cargo with the main focus on Ro-Ro.

MUUGA HARBOUR

The biggest cargo harbour in Estonia is also one of the deepest and most modern ports in the Baltic Sea region.



59.3343° N, 24.0765° E

SAAREMAA HARBOUR

The naturally deep harbour on Estonia's biggest island handles cruise ships and pleasure crafts as well as cargo.

S8.536339° N, 22.235635° E

HELTERMAA

HELTERMAA

VIRTSU

TALLINN

The Port of Tallinn is comprised of four constituent harbours.



TS Laevad 100% ownership

www.praamid.ee

Operates ferry traffic between Estonia's major islands Saaremaa and Hiiumaa and the mainland according to the contract with the state (until 2026).

TS Laevad owns five ferries, of which Tõll, Piret and Regula operate the Virtsu-Kuivastu line and Leiger and Tiiu the Rohuküla-Heltermaa line.

TS Laevad handles two of the most popular internal shipping routes in Estonia with over 2 million passengers and 1 million vehicles annually.



www.ts-shipping.com

TS Shipping

100% ownership

Provides icebreaking and other maritime support/offshore services with the multifunctional icebreaking vessel MPSV Botnica, being contracted by the state of Estonia for winter periods. It also provides full management services for vessels, including commercial, technical and crewing.

Multifunctional MPSV Botnica:

- Ice monitoring and icebreaking
- Anchor handling
- Diving support
- Underwater construction

Green Marine

51% ownership

Provides environmental services for ports and ships, targets sea pollution prevention, localisation and liquidation issues in accordance with international standards.

Green Marine also coordinates waste management services within the ports of Port of Tallinn.









Harbours

Estonia is a sea country – the length of the coastline (3,800 km) is about 6 times longer than the mainland borderline. Therefore it goes without saying – seafaring and port business have long traditions and a mayor impact on the whole country.

Port of Tallinn is the biggest port authority in Estonia and consists of four constituent harbours.

Old City Harbour Tallinn's Old City Harbour is the biggest tourism gateway Tallinn is a popular and one of the highest rated **cruise** Located in the heart of Tallinn, the **Old Town** and in Estonia and one of the busiest passenger harbours **destinations** in the Baltic Sea with the Old City Harbour city centre are just a 10-minute walk away. Old City Harbour in the Baltic Sea region, servicing over 10 million servicing over half a million cruise passengers each year. Ships with draught up to 10 metres and length passengers a year. The harbour also handles Ro-Ro. serves: up to 340 metres are welcome. ★ Ferries **Old City Marina** is also a part of the harbour complex. 🗠 Easy and convenient navigation into the harbour. Cruise ships In terms of regular passenger traffic, the Old City This modern marina serves recreational vessels and is ★ Pleasure crafts Harbour is one of the traffic leaders in the world. sheltered from strong winds and waves. 26(421/-11) CRUISE QUAY Sadama 25, 15051, Tallinn Territory **55.3 ha** Berths **24** Regular ferry lines 27(421/-11) Max. depth Cruise quays **7** (+372) 6 318 555 11 m depart to Helsinki, Stockholm and St. Petersburg from: Old City Harbour vanasadam@portoftallinn.com Eckerö Line Viking Line Moby SPL Total length of berths Ferry terminals Marina Water area portoftallinn.com/old-city-harbour 94.0 ha 110 spaces erminal D 4.2 km





Saaremaa Harbour

Saaremaa Harbour is a **deepwater harbour** and is located on the northern coast of the **biggest island** of Estonia – Saaremaa.

Its favorable geographical location **close to main ship routes** makes it a perfect **stopover** point.

Situated in **unspoilt nature** far from any urban bustle or the crowds, the naturally deep harbour accommodates **passenger** and **cargo** vessels as well as pleasure crafts.

The harbour has two quays available for **cruise ships**, **super yachts** and **cargo vessels**, as well as a quay for **auxiliary vessels** and a floating berth for **small crafts**.

The harbour area also includes free territories for the development of logistic and production units.

Saaremaa Harbour

Territory 13.6 ha

Water area 41.0 ha Max depth 10 m

Total lengthof berths
445 m

Marina depth up to 6 m

Open **24 h**

Max length of vessel 200+ m

> Cruise/ cargo quays

Located on cruise ship routes

Logistics Park 10 ha Ninase küla, Saaremaa Parish 9363, Saaremaa (+372) 6 100 703

saaremaa@portoftallinn.com
portoftallinn.com/saaremaa-harbour



Passenger Traffic

Port of Tallinn is one of the biggest cruise and passenger ports in the Baltics, serving over 10.5 million passengers annually.

Different harbours operating under Port of Tallinn accommodate regular passenger ferries, cruise vessels as well as pleasure crafts.



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Cruise Traffic: Tallinn

Old City Harbour (Cruise)

Max ship length 340 m+ /draft 10 m/ beam 40 m

Cruise quays 7

On request tugboat

Old Town & City Center 0.5 km

Airport 5 km

Compulsory pilot

Security facilities fully compliant ISPS

Maarjamäe Castle and

Estonian Film Museum

Tallinn is a popular and one of the highest rated cruise destinations in the Baltic Sea.

Tallinn's Old City Harbour is the biggest tourist gateway to Tallinn and to the whole Estonia. It is located in the **heart of Tallinn**, within walking distancefrom everything a traveller might need.

It also operates as a **turnaround** port for the embarking and disembarking of cruise passengers.

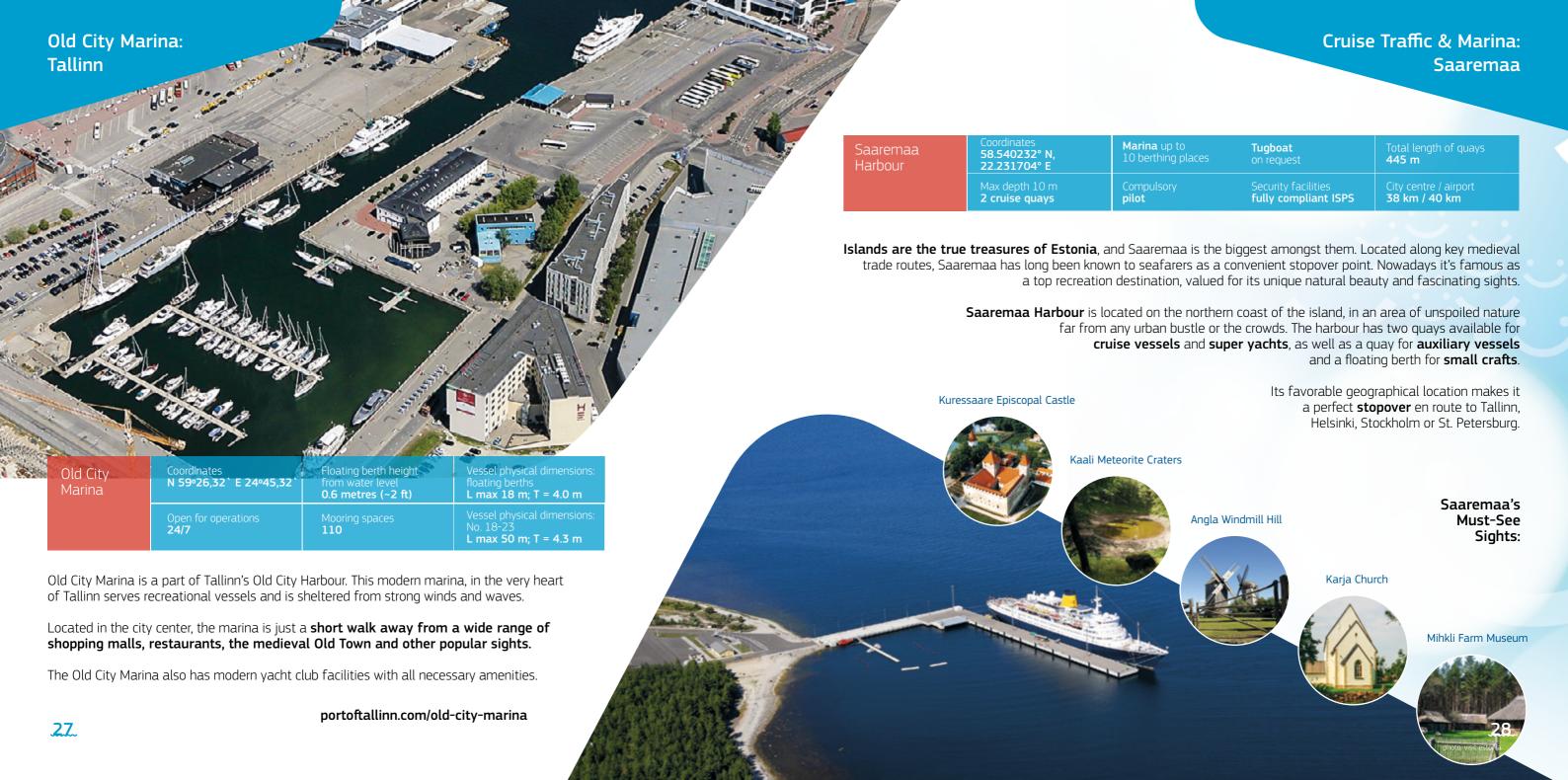
Medieval Old Town

Cruise ships call Tallinn over **300 times a year**, bringing more than **half a million** cruise passengers from approx. **160 countries** to Estonia's capital each year.

The Seaplane Harbour

Tallinn's
Must-See
Kadriorg Palace
and park
Sights:

Estonian Open Air Museum





Cargo

Port of Tallinn harbours handle cargo 24/7 and process all kinds of goods and commodities, including liquid bulk, containers and rolling stock (Ro-Ro) as well as dry bulk goods and general cargo.

Containers are handled in 2 different Port of Tallinn harbours:

Muuga Harbour and Paldiski South Harbour.

Muuga Harbour has a perfect location for container terminal with good connections to roads, railways and hinterland logistic terminals.

Regular container train connections go to **Russia**, **Central Asia** and **Ukraine**. www.operail.com

Container terminal key facts:

🕁 Terminal area **55 ha**

🗠 Capacity **600,000 TEU** per year

♦ 4 quays with total length 1096 m and max depth 14.5 m

Loading equipment: 3 Ship-to-Shore gantry cranes, 6 Rubber Tyred Gantry cranes, Shuttle Carriers, Reach-Stackers, port trucks and multitrailers

Terminal area 55 ha	Sheltered warehouses 8000 m²	4 quays Length: 219 m, 200 m, 298 m, 378 m / Depth: 12.4 - 14,5 m
Capacity 600,000 TEUs	Reefer container depot 404 units	Railway loading stations 60 railcars
Available at 2 harbours	vessel loading/unloading 55-60 units per hour	Trucks loading/unloading 30 minutes from gate to gate

Weekly operated container routes

Operator	Route	Representative
CMA CGM	Hamburg – St. Petersburg – Rauma - Hamburg – Muuga – Helsinki – Hamburg	CMA CGM Estonia
Hapag-Lloyd	Muuga – (Ust-Luga) – St. Petersburg – Kotka – Klaipeda – Gdynia – Hamburg – Bremerhaven – Oslo	Estma OÜ
Maersk Line / Seago Line	Port rotations vary	Maersk Eesti AS
MSC	Muuga – Antwerp – Bremerhaven – Oslo/Copenhagen/Aarhus – Riga	MSC Eesti AS
Unifeeder	Port rotations vary	Estma OÜ

*Data as of February 2019. For more information, visit www.portoftallinn.com.

Terminal operators		
Muuga Harbour	HHLA TK Estonia tk.ee	
Paldiski South Harbour	ESTEVE esteve.ee	

Available at 3 harbours	Busiest traffic in the Baltic States
Ro-Ro traffic / a year	Ro-Ro traffic / a year over
over 5 million tons	450,000 transport units

Ro-Ro cargo is handled in 3 different Port of Tallinn harbours:

Old City Harbour, Paldiski South Harbour and Muuga Harbour.

- Harbours provide a wide range of services for every type of wheeled cargo, including trailers and semitrailers; roll trailers and MAFIs, including containers on roll trailers: new passenger cars, trucks and buses; agricultural and building machinery.
- Port of Tallinn harbours provide the widest network of Ro-Ro lines in the Baltic States, with connections to ports in Finland, Sweden, Russia, Netherlands, Belgium, Germany and the UK.
- Project cargo and High&Heavy cargo also are handled and loaded to rail towards Russian and Central Asian markets.

	1111			Terminal operators
		ESTEVE esteve.ee	HTG Invest htg.tallink.com	Old City Harbour
		Autoterminal autoterminal.ee	Autolink Baltics autolink.as	Paldiski South Harbour
			HHLA TK Estonia tk.ee	Muuga Harbour
		The second second		Representatives
HI (t)		Transfennica transfennica.ee	MannLines mannlines.ee	Scanrapid Eesti scanrapid.ee
18 (1834) 1830 3.3.	Tallink Grupp tallink.ee	Viking Line vikingline.ee	Eckerö Line AB OY Eesti Filiaal eckeroline.ee	Moby SPL stpeterline.com



Operator	Route	Representative
Eckerö Line	Tallinn - Helsinki - Tallinn	Eckerö Line AB OY Eesti filiaal
KESS	Paldiski - St. Petersburg - Uusikaupunki - Bremerhaven - Emden - Sheerness - Zeebrugge - Malmö -Paldiski	Scanrapid Eesti OÜ
Mann Lines	Paldiski - Turku - Bremerhaven - Harwich - Cuxhaven - Paldiski	Mann Lines OÜ
Tallink	Paldiski - Kappelskär - Paldiski	Tallink Grupp AS
Tallink	Tallinn - Helsinki - Tallinn (Old City Harbour)	Tallink Grupp AS
Tallink	Tallinn - Mariehamn - Stockholm - Mariehamn - Tallinn	Tallink Grupp AS
Tallink	Muuga - Vuosaari - Muuga	Tallink Grupp AS
Transfennica	Paldiski - Hanko - Lübeck	Transfennica OÜ
Transfennica	Paldiski - Hanko - Antwerpen	Transfennica OÜ
Transfennica	Paldiski - Hanko - Tilbury	Transfennica OÜ
Transfennica	Paldiski - Hanko – Lübeck – St. Petersburg	Transfennica OÜ
Transfennica	Paldiski - Hanko - Gdynia	Transfennica OÜ
Viking Line	Tallinn - Helsinki - Tallinn	Viking Line Eesti OÜ
Moby SPL	St. Petersburg - Helsinki - Stockholm - Tallinn - St. Petersburg - Tallinn - Stockholm - Helsinki - St. Petersburg	Moby SPL Ltd

^{*}Data as of February 2019. For more information, visit www.portoftallinn.com.

portoftallinn.com/ro-ro-cargo 34

Available at 2 harbours	1,575,950 m³ tank park Muuga Harbour	8000 tons / hour loading speed of oil products
1,973,150 m³ total tank park	397,200 m³ tank park Paldiski South Harbour	VLCC load and discharge vessels 18 m draft

Liquid Bulk is handled in 2 different harbours:

Muuga Harbour and Paldiski South Harbour.

- The harbours offer express rail transportation, **advanced technologies** for discharging rail tank cars and **quick loading** of vessels in **all-year round navigable** ports.
- They also provide shortest transshipment times and **most efficient routes in the region**.
- Terminals offer unique **value-added** services and high flexibility.
- **Depth** at the quays allows to load and discharge VLCC vessels. ★
- Modern technologies and various control systems enable to maintain the highest operational performance **standards**.
- Application of specific techniques guarantee **safety** of all processes and preserve the required **quality** of products.

The proximity to Russia and the infrastructure of harbours enable terminals to offer good transit conditions for liquid oils **globally**.

Terminal operators

Paldiski South Harbour

Baltic Oil Service bos.com.ee

Alexela Terminal alexelaterminal.ee

Vopak E.O.S. vopakeos.com

Vesta Terminal Tallinn vestaterminals.com

Nynas nynas.com

Liquid Bulk development plans

Port of Tallinn has set a goal to penetrate the LNG and/or LPG logistics market by creating a suitable environment for the **construction of gas terminals** and thus building the foundation for the preservation of Estonia's energy independence. The gas terminals are planned to be constructed in the Eastern part of the Muuga Harbour.



Vopak E.O.S. is the promoter of the Tallinn LNG Terminal project, developed in cooperation with Port of Tallinn in Muuga Harbour.

The project is planned to be implemented in phases in accordance with the market needs, diversification of supply (i.e. opening of the market) and Security of Supply requirements.

The project will establish the LNG storage, truck loading, bunkering, gasification and connection into Natural Gas (NG) grid at Muuga Harbour with an initial LNG storage capacity of 4000 m³ and a connection to the natural gas grid with a capacity of up to 0.5 billion cubic metres of natural gas per year. The terminal will be connected to an existing berth (depth –11 m, LOA 198 m). There is possibility to expand the terminal up to 300,000 m³ LNG storage and break bulk facility, connecting into the national high pressure grid and a deep water berth that can serve any LNG vessel on the market.



LPG Terminal

Port of Tallinn is looking for cooperation partners to develop and operate the terminal for LPG throughput and storage. The LPG terminal is planned to be constructed in the Muuga Harbour, in the vicinity of the Port of Tallinn

The terminal will cover a territory of 7.2 ha, with a berth of 198 m in length and a depth of 11 m.

A well-developed infrastructure will accommodate competitive operations, allowing for possible railroad service as well as road transportation and expansion possibilities.

Available at 3 harbours	Grain terminal capacity up to 5 million tons /
Fertilizers capacity 2,300,000 tons	48 silos / 300,000 tons storage capacity

Dry Bulk cargo is handled in 3 different harbours:

Muuga Harbour, Paldiski South Harbour and Saaremaa Harbour.

The volume of dry bulk cargo passing through Port of Tallinn is comprised of fertilizers, grain, scrap metal, gravel, peat, wood pellets etc, handling both export and import as well as transit cargo.

- There is a specialized **fertilizers** terminal in Muuga Harbour with the capacity of up to 2.3 million tons annually.
- The grain terminal in Muuga Harbour (silo capacity of 300 000 tons) is the **largest grain terminal** in the Baltic Sea and one of the largest in the world.
- ★ Value-added services (backing, blending etc.) using modern and environmentally friendly technology are provided.
- **Depth** at the quays allows to load and discharge large (Panamax) vessels. ு

	The second second		
			Terminal operators
	Kuusakoski kuusakoski.ee	ESTEVE esteve.ee	Paldiski South Harbour
	DBT dbtmuuga.ee	HHLA TK Estonia tk.ee	Muuga Harbour
	Stivis stivis.ee	MGT Muuga Grain Terminal AS mgt.ee	
		Bulk & Tank	
.37.		por	toftallinn.com/dry-bulk

Covered storage area	Reefer warehouse capacity
245,000 m²	6 900 m ² / 13 000 tons
Opened storage area	Muuga Harbour
345,000 m²	Free zone

All our cargo harbours have the capacity to handle general cargo / break bulk either individually or in unitised or palletised loads.

A wide range of warehousing, consolidation and distribution (value-added) services are provided (including packing, unpacking and repacking, combining of cargo for consolidated shipments, weighing services, etc).

- The **free zone** in Muuga Harbour allows more flexible customs procedures for companies offering transit and distribution services.
- The harbours have a **modern** infrastructure, sheltered warehouses, open storage areas and reefer warehouses as well as modern equipment and machinery.
- A Harbours are **easily accessible** and have convenient rail and road links.
- ★ The constituent harbours also enable building your own terminal or production unit.





Real Estate Development

Port of Tallinn has an attractive development project for mixed use in the Old City Harbour and three industrial & logistics parks outside Tallinn.

The Old City Harbour development is based on the Masterplan by Zaha Hadid Architects with a total gross volume of 400,000 m² commercial and residential premises.

The three industrial & logistics parks outside Tallinn are Muuga Harbour Industrial & Logistics Park with total area of 76 ha, the Paldiski South Harbour Industrial & Logistics Park with total area of 34 ha and Saaremaa Harbour Logistics Park with total area of 10 ha.

Muuga & Paldiski South Harbour Industrial and Logistics Parks

- Next to terminals and quays
- Great connections sea, rail, main roads
- Location in free zone in Muuga Harbour

Located on international trade routes, the Port of Tallinn Industrial and Logistics Parks are ideal hubs for warehousing and distribution service providers as well as commodities producers. Operating **next to modern terminals** enables to reduce **transportation costs** significantly and **add value** by using commodities handled in the harbour as an input to production.

Muuga
Industrial Park

Located in the largest and deepest cargo port in Estonia

Industrial park area
76 ha

Distance from Tallinn
17 km

Plot areas: total 58 ha plots 0.3–21 ha

Development area

Industrial Park area 76 ha

portoftallinn.com/muuga-industrial-park

Important stopover point for regular Ro-Ro lines to Western Europe and Scandinavia

Distance from Tallinn
45 km

Paldiski South Harbour Industrial Park

Plot areas
1,5–15 ha





Port of Tallinn is carrying out the Tallinn's Old City Harbour development activities based on the 2030 Masterplan, which serves as the foundation for property development in the port area with the aim of connecting the city and public to the port, while spurring new development that will complement and enhance the existing functions of the port.

In addition to continuing port functions, the Old City Harbour area will become a desirable place to live and a flexible business area.

Seamless connectivity from the ferry and cruise terminals to the city centre will reinforce liveable and accessible areas, making the harbour a district for today and tomorrow.

The Masterplan 2030 was designed by the internationally acknowledged architectural bureau Zaha Hadid Architects.

- Strategic opportunity to develop prime real estate covering area 16.2 ha.
- The total volume of built-up gross area will be up to 460,000 m² above ground, including 160,000 m² extention possibility by land reclamation.



