



 **UKRAGROCONSULT**

UKRAINE PORTS GRAIN-HANDLING FACILITIES



CONTENT

<u>THE STUDY METHODOLOGY</u>	4
<u>EXECUTIVE SUMMARY</u>	5
<u>A1. CHORNOMORSK SEAPORT. GENERAL DESCRIPTION</u>	17
A1.1 Transbulkterminal	20
A1.2 Illichivsk Grain Terminal	22
A1.3 Risoil	24
A1.4 Transservice	26
<u>A2. ODESA SEAPORT.GENERAL DESCRIPTION</u>	28
A2.1 Ukrelevatorprom Grain Export Terminal.....	30
A2.2 Olympex Coupe Grain Export Terminal	32
A2.3 Odesa Grain Terminal (SFGCU).....	34
A2.4 Novotech terminal	36
A2.5 Brooklyn-Kiev.....	38
A2.6 Porto-san.....	40
<u>A3. YUZHNY SEA PORT. GENERAL DESCRIPTION</u>	42
A3.1 TransInvestService (TIS)	44
A3.2 Borivage Grain Terminal.....	46
A3.3 MV Cargo (Cargill).....	48
<u>A4. MYKOLAIV PORTS</u>	50
A4.1 Nibulon Grain Terminal of Mykolaiv	53
A4.2 Greentour-Ex Terminal	55
A4.3 Danube Shipping Stevedoring Company	57
Terminal (COFCO)	57
A4.4 Mykolaiv port elevator Terminal (SFGCU).....	59
A4.5 Grain terminal Nika-Tera	61
Grain loading at the roadstead of Ochakiv	63
<u>B1. KHERSON SEAPORT.GENERAL DESCRIPTION</u>	65
B1.1 Kherson bakery plant.....	67
B1.2 Dnipro Cargo	69
<u>B2. MARIUPOL SEAPORT. GENERAL DESCRIPTION</u>	71
B2.1 Ukrtransagro	73
<u>B3. BERDYANSK SEAPORT.GENERAL DESCRIPTION</u>	75
B3.1 Nova Khortytsya Terminal	77
<u>C. GROUP OF OTHER PORTS</u>	79
<u>CONCLUSIONS</u>	82

Dear Colleagues,

To meet investors and traders' expectations better, as well as to know the latest requirements of actors on the grain markets, we are very pleased to inform you that we are launching a brand new advanced Research – Ukraine Ports Grain-Handling Facilities.

The culmination of about 25 years of experience in global markets analysis, the new Research Ukraine Ports Grain-Handling Facilities will provide you with complete access to our analysts' expertise across the full spectrum of logistical and infrastructural issues of Ukraine, that lead the grain markets.

The new Research is focused on the 13 sea trade ports, which are located along Ukrainian coasts of the Black and Azov seas. For the first time we grouped the ports into 3 clusters. This new approach allows us to consider much deeper and more comprehensively the advantages and disadvantages of each Group/Port. This also meets the aims of the Research and is in full compliance with the target grain markets and Ukrainian domestic agrarian potential.

The Research Ukraine Ports Grain-Handling Facilities is prepared with enhanced content, encloses an exhaustive and in-depth analysis of Ukrainian export terminals, and provides an easy-to-read format to feature new and improved graphics and visualization.

Therefore, you can maintain a keen understanding of Ukrainian agri industry trends and investment climate developments.

If you want to participate in the expansion of Ukrainian exports, which is going to happen for sure, please, consider the possibility to take part in the enhancing efficiency of Ukrainian export logistics by reading the Research Ukraine Ports Grain-Handling Facilities.

We hope this new advanced Research will provide potential investors with the additional support for your own market analysis and strategy development.

Sincerely Yours,

UkrAgroConsult Team

EXECUTIVE SUMMARY

Grain and Oil Crops: Export Potential of Ukraine

Ukraine is a major grain exporter with impressive competitive advantages. Currently, Ukraine produces roughly XX M mt of grains and oilseeds, incl. some XX M mt for export. The export promotes Ukrainian farming sector's development being key driver of the construction of new grain export terminal.

According to UkrAgroConsult, production of grains and oilseeds will increase by XX-XX% in 2018-2022, up to 95-100 M mt and even up to XX-XX M mt by 2030-2032. With relatively stable domestic consumption, the rise in production will bring the country's export potential up to XX-XX M mt (incl. XX-XX M mt of grain and XX-XX M mt of oil crops and meals).

Due to growing grain production and oilseed crushing with predicted rise in meal exports, the total volume of the dry agricultural cargoes handling is projected to be at level of XX-XX M mt by 2030-2032 incl. the following:

- XX-XX M mt of grains
- X-X.X M mt of oilseeds
- X-X.X M mt of meals

Almost all the above mentioned commodities are exported through Black Sea export terminals (XX-XX%). This fact increases the reliability of UkrAgroConsult conclusions that logistics is and will be one of the most attractive assets for long terms investing for the next 8-10 years.

Please see detailed outline of Ukraine Grain and Oil Crops potential in the Appendix 1 "KEY AGRARIAN EXPORT INDICATORS"

THE FOLLOWING PARAGRAPHS ARE COVERED IN THE FULL VERSION OF THE STUDY:

Ukraine: Demand for Grain Export Terminal Services

Capacity of Export Grain Handling Market

Grain Transshipment Technology in Use

Export Terminal Services Margins

Key Risks

Other Risk

Key Factors of the Decision Making

- **Seasonal factor and loading coefficient of grain-handling sector**
- **Loading Rates of the Grain Export Terminals**

- Loading Rates of Ukrainian Grain Handling Capacities
- Grain Export Terminals: Nominal Capacity vs. Actual Export. Comparisons and Loading Factor
- Summary table

Region/Port	Terminal's name	Date of construction	Nominal capacity, K mt	Actual export, 2017/18	Storage capacity, K mt	Third party	Truck unloading, K mt/day	Railway unloading, K mt/day	Loading capacity, K mt/day
Chornomorsk	Transbulkterminal	XXXX	XXXX	XXXX	XXX	XXX	XXX	XXX	XXX
	IGT	XXXX	XXXX	XXXX	XXX	XXX	XXX	XXX	XXX
	Risoil								
	Transservice								
Odesa	Ukrelevatorprom								
	Olympex Coupe								
	Odesa Grain Terminal								
	Novotech terminal								
	Brooklyn-Kiev								
	Porto-San								
Yuzhny	TransInvestService								
	Borivage								
	MV Cargo								
Mykolaiv region	Nibulon								
	Greentour-Ex								
	DSSC								
	Mykolaiv port elevator								
	Nika-Tera								

Source: UkrAgroConsult calculations based on port data

- Factor of modified Grain Target Markets
- Saving Costs Factor

COMPARATIVE DESCRIPTION OF UKRAINE'S MAJOR GRAIN-HANDLING PORTS

Port	Advantages	Disadvantages
Chornomorsk commercial seaport	<ul style="list-style-type: none"> • XXX • 	<ul style="list-style-type: none"> • XXX
Odessa commercial seaport		
Yuzhny commercial seaport		
Mykolaiv commercial seaport		
Kherson commercial seaport		

Source: UkrAgroconsult based on open sources and market participant's interview

Group A.

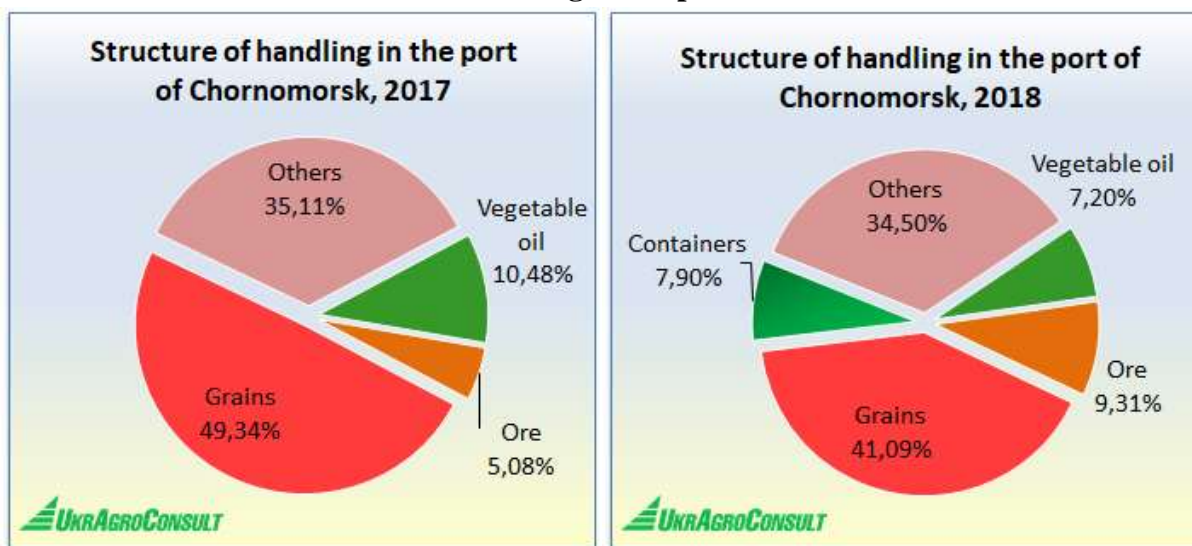
A1. CHORNOMORSK SEAPORT. GENERAL DESCRIPTION

➤ Location of the Chornomorsk Sea Port

Chornomorsk Commercial Sea Port, one of the largest ports in Ukraine, is located on the banks of the Sukhoy estuary 12 miles South-West of Odessa. The location of the port in the deep-water estuary, connected to the sea by the entrance channel, creates a natural protection of the water area from waves and currents, and also favors year-round navigation. If iced vessels are accompanied by the Port tugs.

The port was founded in 1958 by reconstruction of the cargo area of the Odessa port.

Structure of handling in the port of Chornomorsk



➤ Contact information:

Chief of Administration – XXX
Chornomorsk Sea Port Authority
6 Truda Street, Chornomorsk, Odessa region, 68001, Ukraine.
Phone (reception): +38 XXX
Phone (office): +38 XXXX
E-mail (office): XXX
e-mail: XXXX

➤ **Chornomorsk Port Terminals. General Outlook**



➤ **The following grain-handling terminals are situated in the Chornomorsk Sea Port:**

- A1.1. Transbulkterminal / Kernel
- A1.2. Illichivsk grain terminal / Glencore
- A1.3. Risoil
- A1.4. Transservice

Grain piers in the Chornomorsk Port

Technical specifications				GPS data	
Owner/Operator	Pier #	Depth, m	Length, m	LAT	LON
A1.1. Transbulkterminal / Kernel	№ XXX	XXX	XXX	XXX	XXX
A1.2. Illichivsk grain terminal / Glencore					
A1.3. Risoil					
A1.4. Transservice					

Source: USPA register

A1.1 Transbulkterminal



Source: wikimapia

➤ **Location of terminal, date of construction**

- The grain-handling terminal was put into operation back in 1998.
- The terminal is located on the territory of the seaport of Chornomorsk.
- Address: Chornomorsk, Suholimanskaya str., 58-A

➤ **Ownership structure**

Transbulkterminal is owned by Kernel Group. The Group is a vertically integrated national company operating in the agro-industrial sector of Ukraine since 1994.

Name	A JOINT VENTURE IN THE COMPANY WITH LIMITED RESPONSIBILITY "TRANSBULTERTERMINAL" (Joint Venture LLC "TRANSBULKTERMINAL")
List of founders	XXX
FIRST BENEFICIAR	XXX

Technical specifications of grain terminal Transbulkterminal

Description	Summaries
Type of vessels	Coaster, Handysize, Handymax, Panamax
Access routes	Grain terminal is able to receive grain by railway and by trucks
Throughput capacity of railway station	Chornomorsk–Port station - XXX wagons/day (for all cargoes and all consignees)
Grain-handling capacity, yearly	XXX K mt
Technical features of piers	2 piers: Pier №XX, depth of XXXm, length of XXXm Pier №XX, depth of XXXm, length of XXXm
Unloading capacities	XXX K mt/day ... lines of truck unloading: XX trucks or XX K MT/day ... lines of railway unloading: XX rail cars or XXX K MT/day
Storage capacity	XXX K mt: Metal silos BEHLEN (USA)
Loading equipment capacity, total	XX K mt/day Loading of Panamax lasts about XX hours Terminal can operate 2 Panamax vessels at the same time.
Storage turnover, 2017/18 MY	XX
Open for third party business	XXX
Number of employees	XXX



Tel./fax +380 44 451 46 34
multi-channel

:Address

,Office 5, Timoshenko Str. 29-V
Kyiv, Ukraine ,04205

agro@ukragroconsult.org
www.ukragroconsult.com
www.blackseagrain.net

:Адрес

Киев ул.Тимошенко 29в, офис 5
Украина 04205

Тел./факс +38 044 451 46 34
(многоканальный)