

Metal Expert Freight

Azov-Black Sea freight market 2010-2011: "River-Sea" and Coaster vessel markets

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METALLURGICAL CARGOES

COAL

FERTILIZERS

GRAINS

TIMBER

CEMENT



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Freight rates dynamics 2009 – 2010





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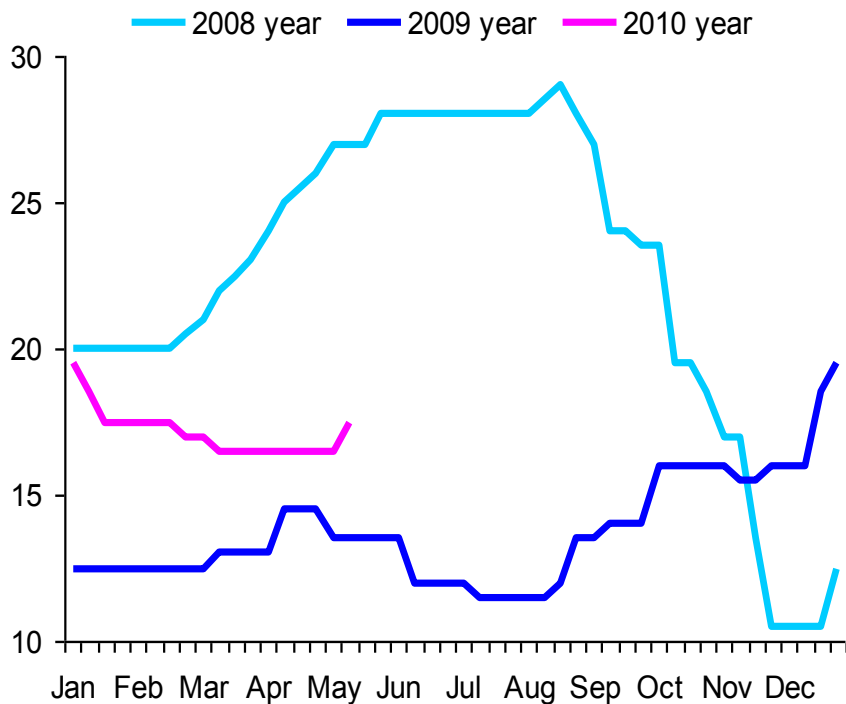
GRAINS

TIMBER

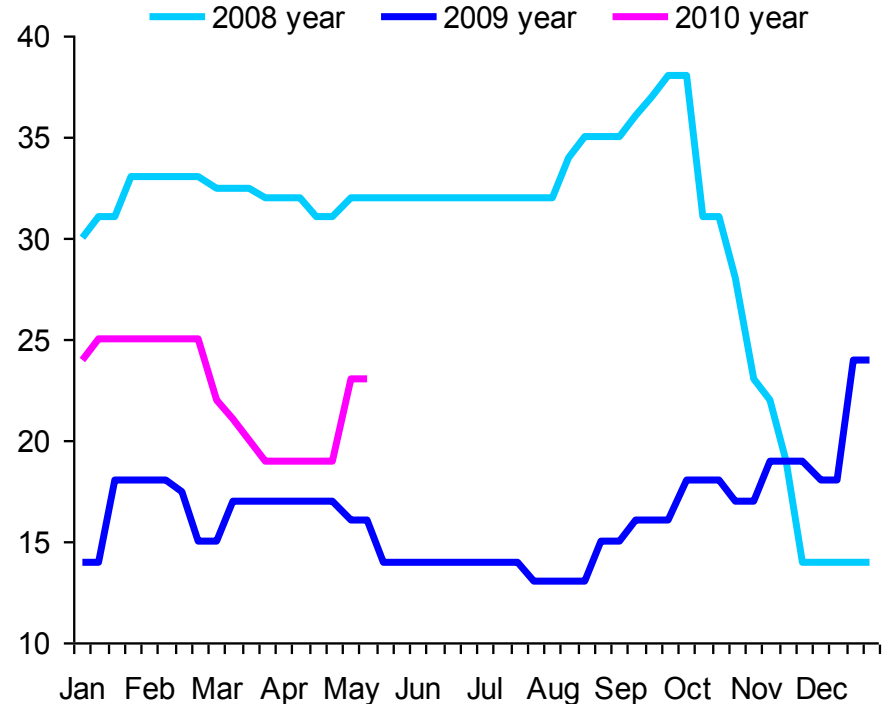
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Steel products freight rates

5,000t, Odessa - the Sea of Marmara, \$/t



3,000t, Yeisk - the Sea of Marmara, \$/t



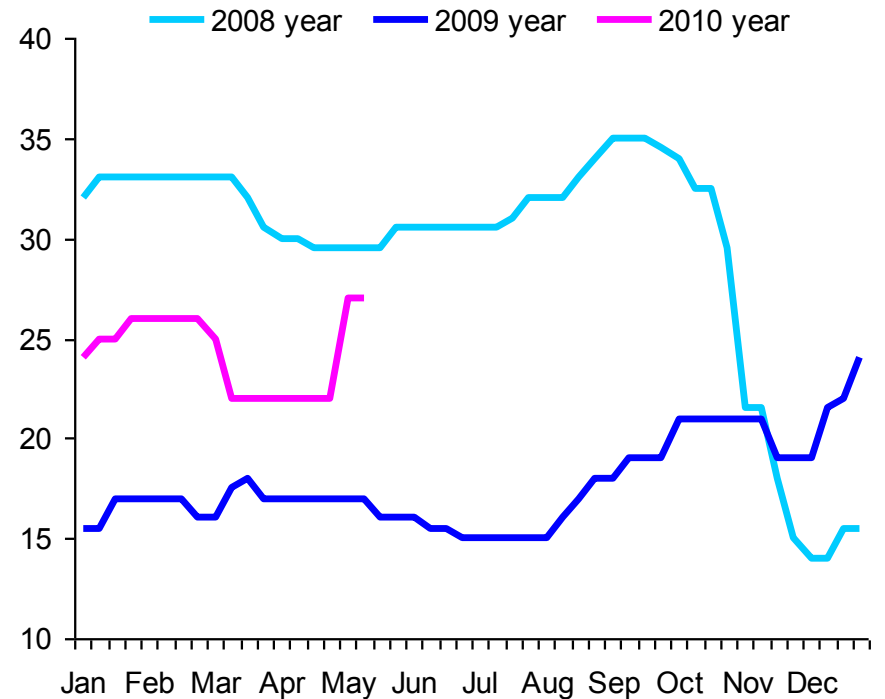
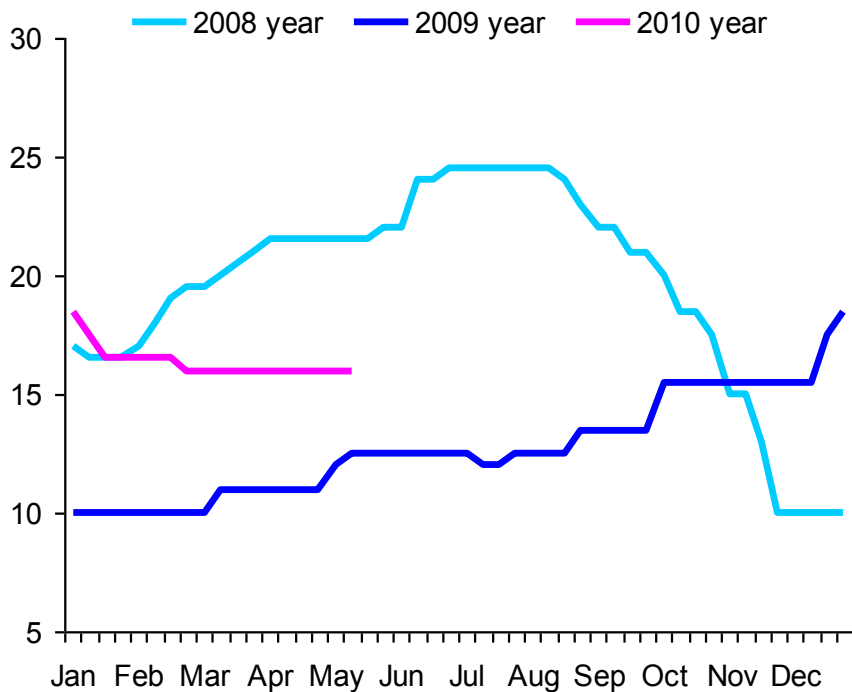


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Coal freight rates

5,000t, Kerch - the Sea of Marmara, \$/t

3-5,000t, Azov port - the Sea of Marmara, \$/t





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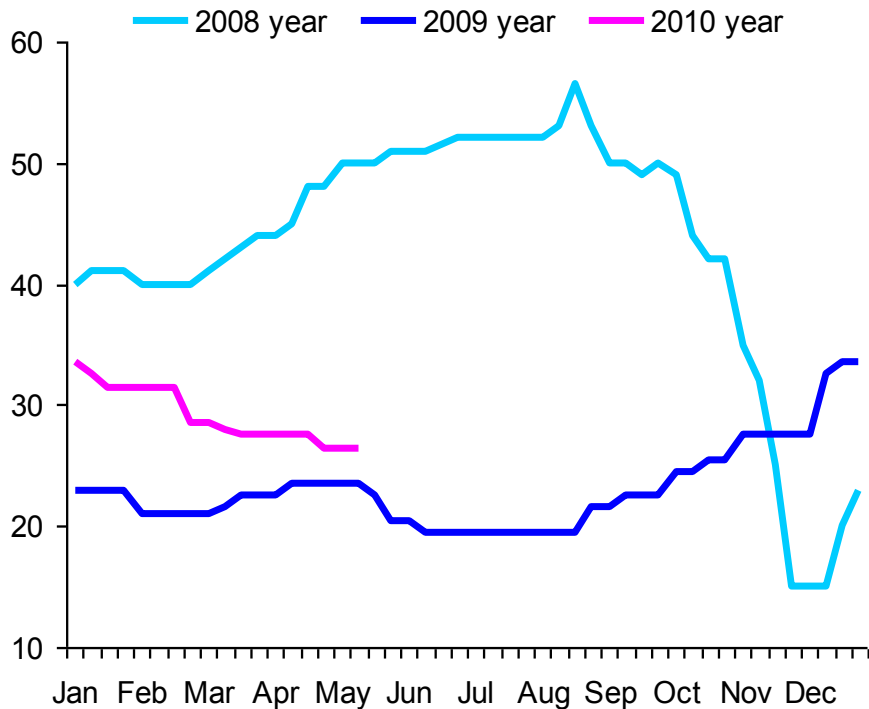
GRAINS

TIMBER

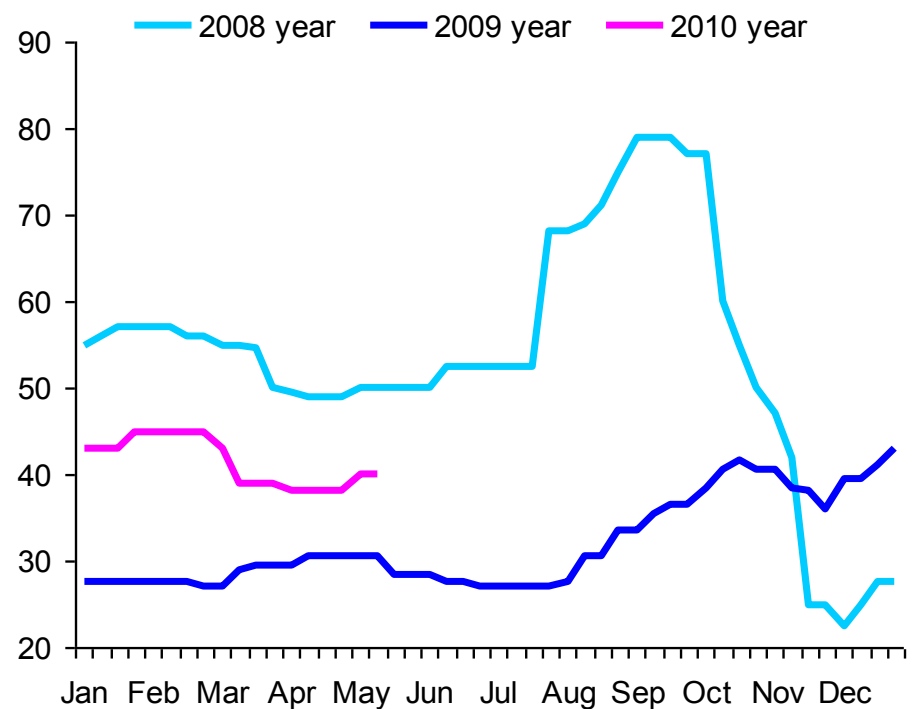
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Grain freight rates

5,000t, Odessa - Italy, Adriatic Sea, \$/t



3,000t, Azov port - Alexandria, \$/t



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Fleet renewing





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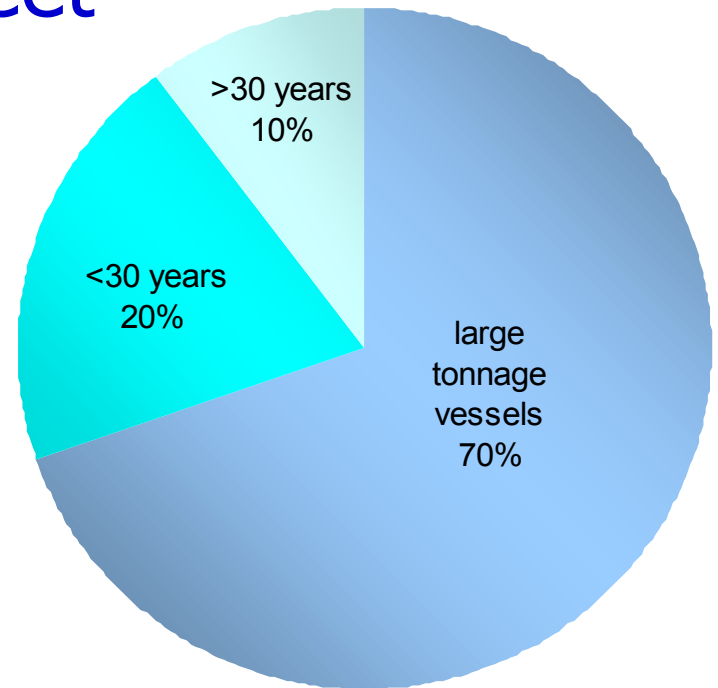
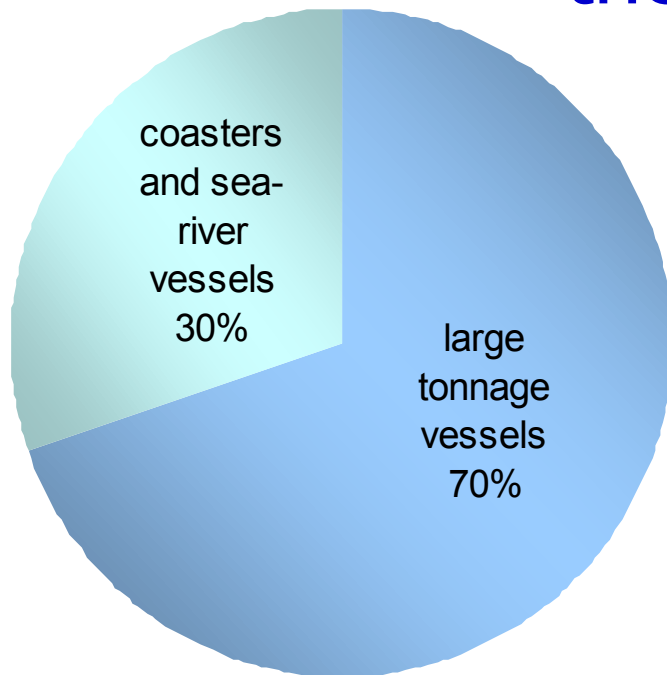
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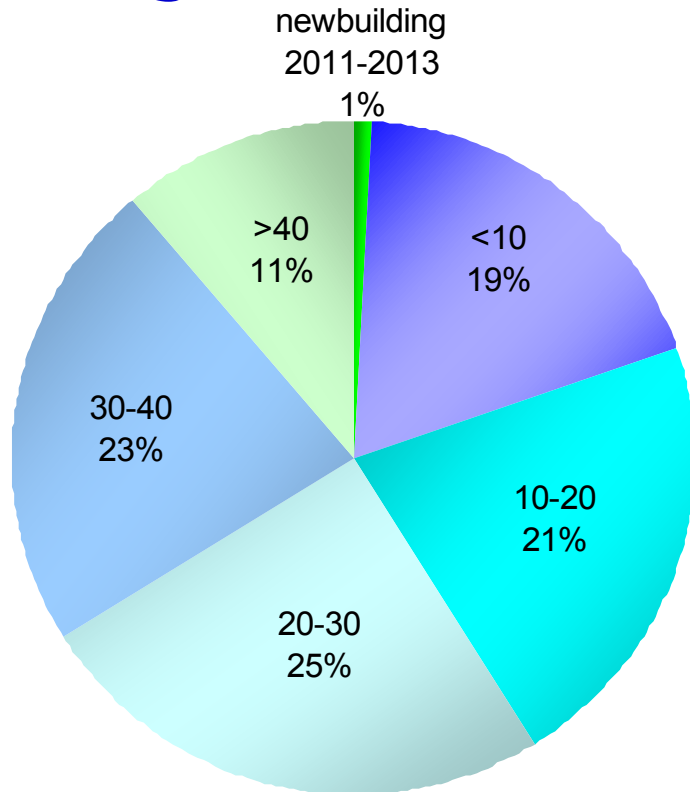
Share of coasters and sea-river vessels in the world fleet





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Age of river-sea vessels and coasters



Age	Number
newbuilding 2011-2013	58
<10	1439
10-20	1625
20-30	1902
30-40	1728
>40	845

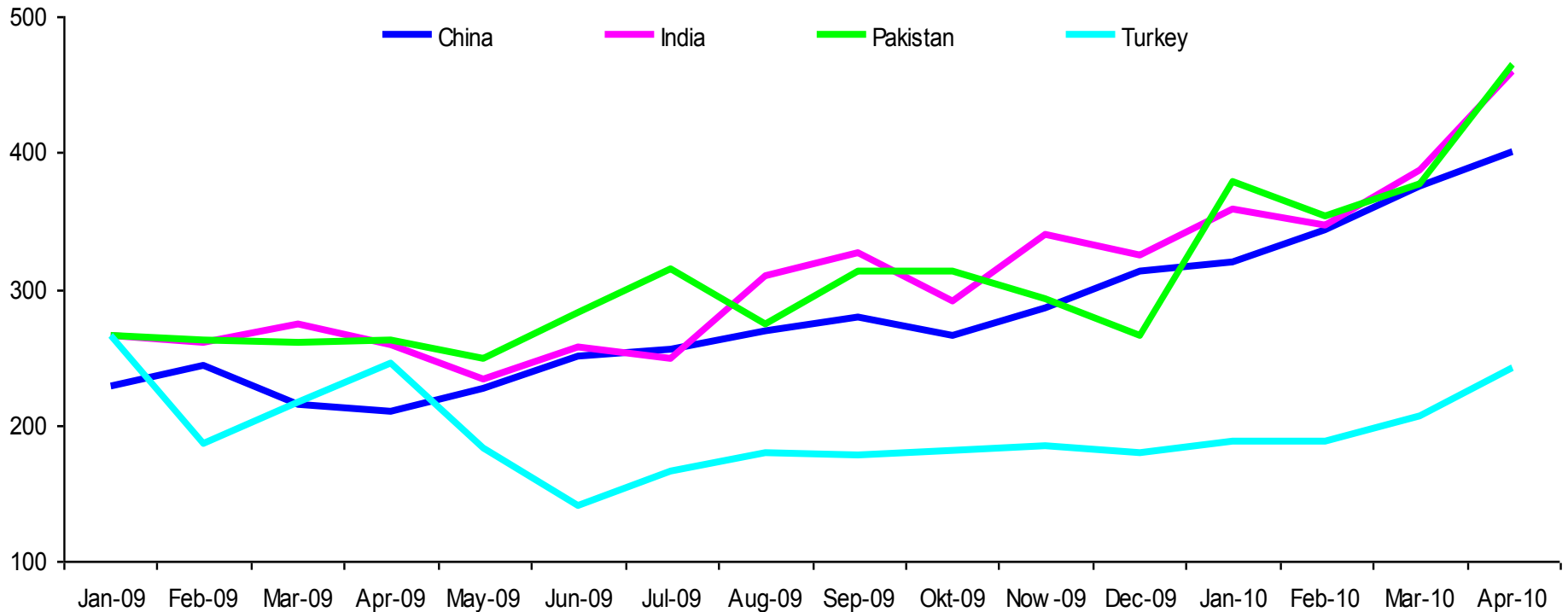
Dead vessels
574

New buildings
245



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Ships scrap prices 2009-2010





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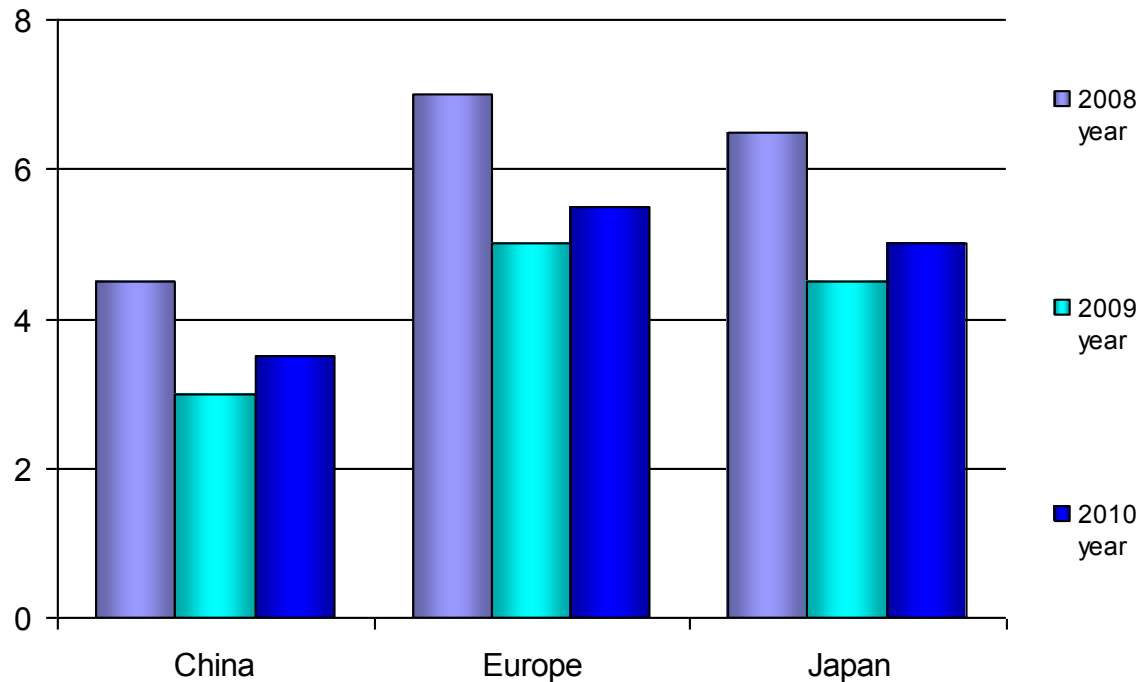
FERTILIZERS

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Average costs of newbuilding with DWT 3,000t, \$mIn





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Azov-Black Sea basin freight market forecast 2010-2011

Decreasing number of available vessels



freight market increase

Market development will depend on seasonal factors

Metal Expert Consulting

research in ferrous metallurgy,
chemical and coal industries

- Customized market research
- Optimization of marketing and product strategies
- Business planning and strategic planning
- Development of conceptual projects,
- Due diligence, feasibility studies

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