

# Estonia – Access to a Market of 300 Million Consumers



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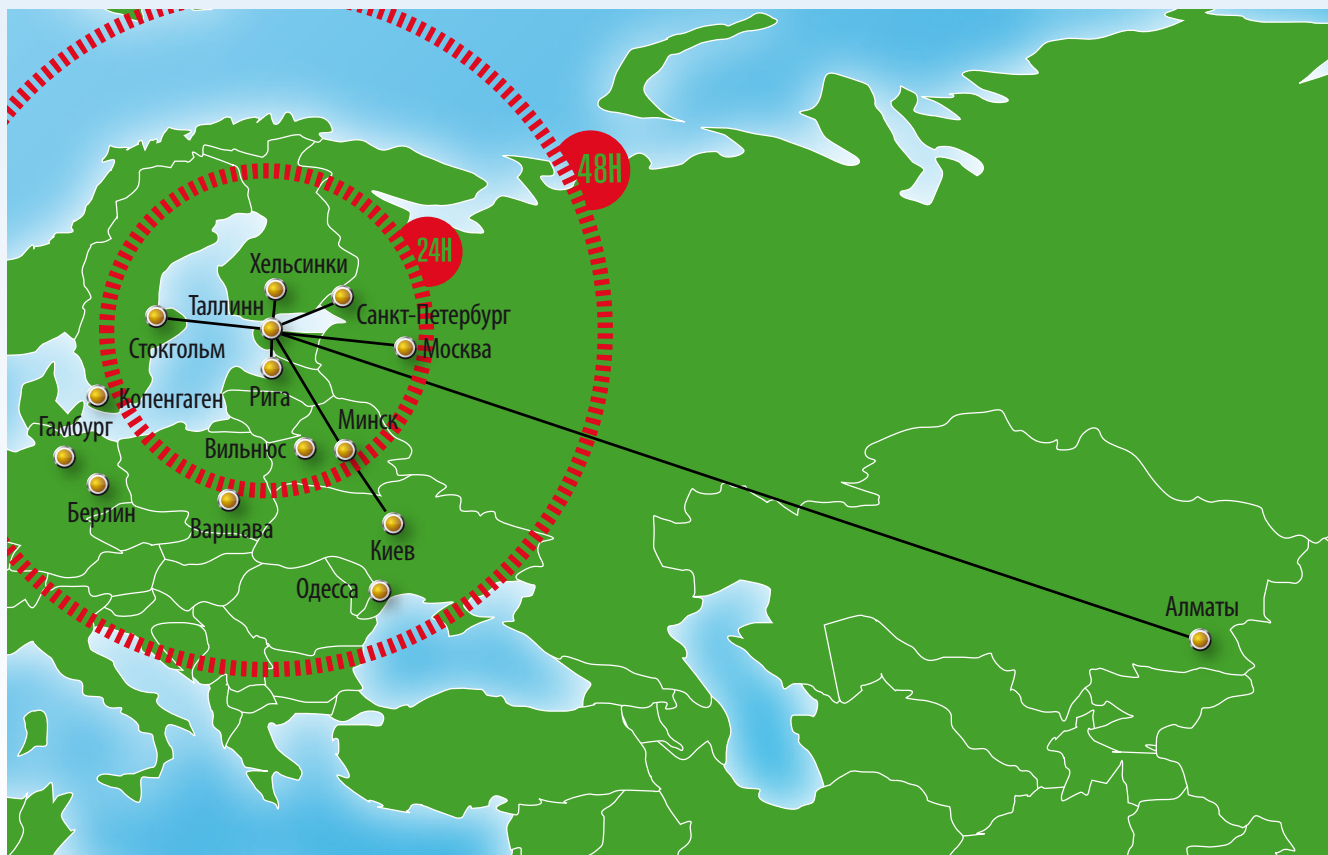
Estonia - Access to a market of 300 million consumers

# ESTONIA – ACCESS TO A MARKET OF 300 MILLION CONSUMERS

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# ESTONIA – EFFECTIVE ACCESS TO A CONSUMER MARKET OF 300 MILLION





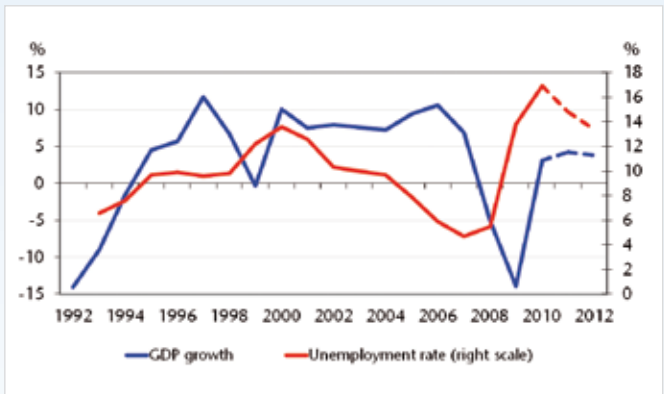
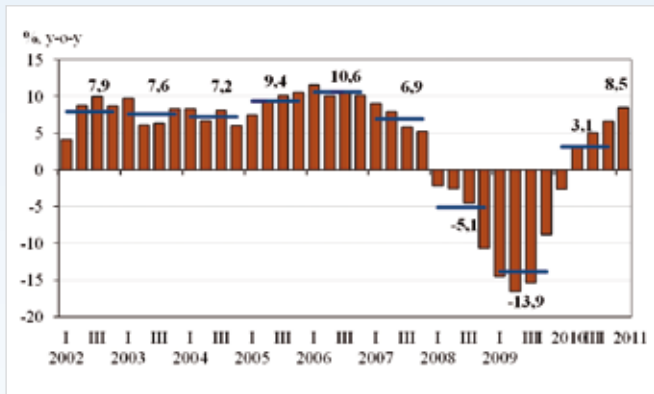
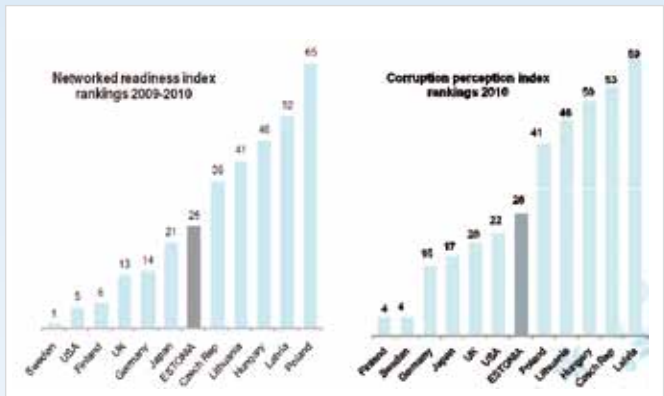
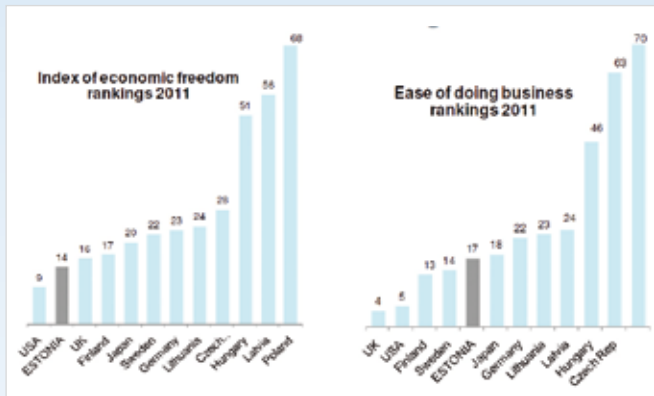
# ESTONIA – HIGHLY COMPETITIVE, FAST, STABLE, COST EFFICIENT AND FLEXIBLE

## A VALUE PROPOSITION

- Effective access to a consumer market of 300 million
- Effective and efficient transport corridor 24/7 @ 365
- Deep ice free ports, highly developed infrastructure
- No strikes or other work interruptions
- Corruption free, no hidden costs
- Liberal trade and pricing policy
- Open – No restrictions to the free movement of capital
- Clear – Simple and proportional tax system
- Best place to grow fast – 0% corporate income tax
- Stability – member of EU, NATO, Schengen and OECD
- Convenient – Estonian currency is euro



## FACTS & FIGURES



## CONTACT DETAILS

### Estonian Ministry of Economic Affairs and Communications

Harju 11, 15072 Tallinn, Estonia  
**Telephone:** +372 625 6342  
**Fax:** +372 631 3660  
**E-mail:** transit@mkm.ee  
**Web:** www.mkm.ee

### Estonian Ministry of Foreign Affairs

Islandi Välgak 1, 15049 Tallinn, Estonia  
**Telephone:** +372 637 7000  
**E-mail:** ivminfo@vm.ee  
**Web:** www.vm.ee

### EAS – Enterprise Estonia

Lasnamäe 2, 11412 Tallinn  
**Telephone:** +372 627 9700  
**Fax:** +372 627 9701  
**E-mail:** eas@eas.ee  
**Web:** www.eas.ee

## A VALUE PROPOSITION

- Due to its geographically advantageous location on the eastern shore of the Baltic sea, deepwater seaports, land bridges to Russia, CIS, Central Asia, Black Sea and Far East, Estonia is a perfect distribution centre (DC) providing effective access to a consumer market of 300 million.
- Estonian harbours are unique in Europe in the sense that there is still plenty of land available for the construction of new terminals. Rapid development and construction of new infrastructure and facilities.
- Depth at the quays allows to load and discharge the vessels up to VLCC loaded until 17m draft (170 000 tons).
- Estonian harbours have the most modern infrastructure and technology in Europe. All ports apply both the IMO and EU safety rules and regulations
- Europe's most efficient terminals are situated at the Estonian harbours, so reloading of goods is performed faster than in other European harbours
- There are three EU Free Zones in Estonian ports offering wide range of business opportunities both for transit and manufacturing.
- Constantly high service quality, reliability, responsiveness and flexibility are considered as a common standard. Estonian ports and entire logistics system is working 24/7 all year round.



## PRODUCT DESCRIPTION

- Estonian ports are ice free. Vessels have easy and safe access to Estonian harbours all year around due to easily navigable waters and constant water level with no tides.
- Fast loading and discharging of vessels with any size up to 17m draft. Direct transshipments vessel-rail/truck and vice versa, or via storage facilities.
- Full range of transshipment, storage (including customs/excise), value adding services for liquid, dry and break bulk, general cargo, frozen goods, containers, trailers, cars, trucks, buses, off-road machinery, project cargo etc
- Railroad connection from Estonian ports leads up to the Pacific Ocean, Black Sea, Mongolia and Afghanistan, as the Estonian Railways are part of the 1520mm railway network. The harmonised SMGS railway bill enables transportation of goods across the entire 1520 mm gauge rail network (Baltic countries, Russia, CIS, Central Asia, Mongolia, and Finland) and beyond on the basis of unified standards. Rail tariffs can be fixed for up to 5 years.
- Unique value added services and high flexibility of the specialized terminals and warehouses in Estonian ports enable customers to trade with wide variety of goods and commodities – directly ex Estonian ports.

## SERVICE PROVIDERS

- **Port of Tallinn (consisting of five separately located harbours: Muuga Harbour, Paldiski South Harbour, Tallinn Old City Harbour, Paljassaare Harbour and Saaremaa Harbour)** is the largest port at the Baltic Sea, taking into account both cargo volumes and passenger traffic. There are functional terminals for handling of liquid and dry bulk, general cargo, containers and ro-ro. Port of Tallinn offers up to 100 ha of pre-developed area for development of new terminals and distribution centres.
- **Port of Sillamäe (Silport)** is the EU's most eastern deep-sea port, located only 25 km from the border between European Union and Russian Federation. Silport offers up to 600 ha for development of new terminals and distribution centres.
- **Paldiski Northern Port** is a rapidly developing comprehensive port 50 km south-west of Tallinn, providing fast access for the vessels approaching from the Western Europe, PDI, stevedoring and stock keeping services.
- All three above mentioned ports are operating as landlords and have direct rail access. Muuga Harbour and Port of Sillamäe have Free Zones in their harbours, there is also a Free Zone area close to Paldiski Northern Port.

## CONTACT DETAILS

### Port of Tallinn

Sadama 25, 15051 Tallinn, Estonia  
**Telephone:** +372 631 8555  
**Fax:** +372 631 8166  
**E-mail:** portoftallinn@portoftallinn.com  
**Web:** www.portoftallinn.com

### Port of Sillamäe (Silport)

Kesk 2, 40231 Sillamäe, Estonia  
**Telephone:** +372 640 5271  
**Fax:** +372 640 5279  
**E-mail:** silport@silport.ee  
**Web:** www.silport.ee

### Paldiski Northern Port

Petri 11, 76805 Paldiski, Estonia  
**Telephone:** +372 651 1010  
**Fax:** +372 651 1011  
**E-mail:** info@portofpaldiski.ee  
**Web:** www.portofpaldiski.com

# TRANSHIPMENT OF OIL PRODUCTS & HUB OPERATIONS

## A VALUE PROPOSITION

- Express rail transportation and advanced technologies for discharging rail tank cars together with quick loading of vessels in the ice free ports result in quickest transshipment times and most efficient route in the region
- Depth at the quays allows to load and discharge the vessels up to VLCC loaded until 18m draft (or up to 15 m draft limitation at Danish Straights which is equal to VLCC intake up to 170 000 tons)
- Unique value added services and high flexibility of the terminals enable customers to trade globally with wide variety of oil products
- Modern technologies are used and various control systems enable to maintain the highest operational performance standards
- Appliance of specific techniques in order to guarantee safety of all processes and to preserve the required quality of products
- Fixed long term tariffs



## PRODUCT DESCRIPTION

- Full range of transshipment and hub services for crude oil, heavy and light oil products.
- Oil products express rail transportation. The harmonized SMGS railway bill enables transportation of goods across the entire 1520 mm gauge rail network (Russia, CIS, and Central Asia) and beyond on the basis of unified standards. Dedicated block-trains enable transit time reduction up to 50%.
- Advanced technologies for discharging over 60,000 tons of oil products per day from rail tank cars, allowing the rail cars to make full round trip on Estonian territory within 24-36 hours.
- Fast loading and discharging of vessels with any size with up to 18m draft (approximately 4000 cbm/h).
- Terminals work on schemes rail-terminal-ship, ship-terminal-rail, ship-terminal-ship and ship-to-ship.
- Segregated storage of oil products, customs/excise warehousing.
- Reliable, transparent and flexible transshipment with extra value added by services like blending, specific quality cargo patches, cargo improvement through additives etc.
- Real time on-line information to the customers.
- Independent laboratory analyses.
- Customs formalities, commodity insurance, financing.
- Free Zones in Muuga Harbour (Port of Tallinn) and in Port of Sillamäe (Silport).

## SERVICE PROVIDERS

- **Vopak E.O.S.** - the largest independent tank terminal operator in the Baltic States - operates four modern terminals with a total storage capacity of 1 026 000 cbm in the Port of Muuga Free Zone (within Port of Tallinn). Vopak E.O.S. Ltd. is incorporated in the network of Royal Vopak, the global market leader in independent storage and handling of liquid and gaseous chemicals and oil products.
- **E.R.S.** - a wholly owned subsidiary of Vopak E.O.S. - secures through its control over railway logistics a smooth flow of rail tank car deliveries, which in peak times may amount to as many as 1000 rail tank cars per 24 hours.
- **Alexela Logistics** operates light oil products tank farm with total capacity of 317 900 cbm in Paldiski South harbor (within Port of Tallinn) and multifunctional tank farm with total capacity of 292 500 cbm in Port of Sillamäe (Silport) Free Zone, only 25 km from the EU-Russia border.
- **Port of Tallinn.** Total storage capacity of oil products in the Port of Tallinn terminals is 2 000 000 cbm. 40 million tons of oil products can be transhipped through these terminals annually. Suitable areas are available for development of additional terminals in the ice free Muuga Harbour.
- **EVR Cargo (affiliate of Estonian Railways).** Efficient logistics, flexible transport tariff policy, and sales strategy based on trust enable EVR Cargo to provide world class transport services to its customers. 56 powerful locomotives with US-origin are ready to carry up to 8000-ton trains. Total capacity of EVR Cargo is 50 million tons per year. Tariffs can be fixed for up to five years.

## CONTACT DETAILS

### Vopak E.O.S.

Regati 1, 11911 Tallinn, Estonia  
**Telephone:** +372 626 6100  
**Fax:** +372 631 3096  
**E-mail:** info@vopakeos.com  
**Web:** www.vopakeos.com

### E.R.S.

Peterburi mnt. 105, 74114 Maardu, Estonia  
**Telephone:** +372 715 2601  
**Fax:** +372 715 2620  
**E-mail:** info@ers.com.ee  
**Web:** www.ers.com.ee

### Alexela Logistics

Roseni 13, 10111 Tallinn, Estonia  
**Telephone:** +372 615 4079  
**Fax:** +372 615 4068  
**E-mail:** info@alexelalogistics.eu  
**Web:** www.alexelalogistics.eu

### Port of Tallinn

Sadama 25, 15051 Tallinn, Estonia  
**Telephone:** +372 631 8555  
**Fax:** +372 631 8166  
**E-mail:** portoftallinn@portoftallinn.com  
**Web:** www.portoftallinn.com

### EVR Cargo

Toompuiestee 35, 15073 Tallinn, Estonia  
**Telephone:** +372 6158 696  
**Fax:** +372 6158 599  
**E-mail:** cargo@evr.ee  
**Web:** www.evr.ee

## A VALUE PROPOSITION

- Unique terminals allow to tranship liquid chemicals, petrochemicals and liquid fertilisers
- Express rail transportation and advanced technologies for discharging rail cars and quick loading of vessels in the ice free ports result in quick transhipment lead times
- Depth at the quays allows to load and discharge even the largest vessels able to the Baltic Sea through Danish Straights
- Modern technologies are used and various control systems enable to maintain the highest operational performance and safety standards
- Appliance of specific techniques in order to guarantee safety of all processes and to preserve the required quality of products



## PRODUCT DESCRIPTION

- Full range of transhipment and value added services (blending) for liquid chemicals, fertilisers and petrochemicals like ammonia, UAN, monoethylene glycol, methanol, toluene, acetic acid, alkalizes, dichloroethane, MTBE, xylenes, isoprene, benzol, vinyl acetate, butyl acetate and other
- Rail transportation of liquid chemicals. The harmonized SMGS railway bill enables transportation of goods across the entire 1520 mm gauge rail network (CIS, Baltic countries, Mongolia, and Finland) and beyond on the basis of unified standards.
- Advanced technologies for discharging rail tank cars, top and bottom discharge, with product heating when necessary (up to 600 tons/h)
- Fast loading and discharging of vessels with any size up to 13m draft (up to 1200 tons/h)
- Terminals works on schemes rail-ocean, ocean-rail and ocean-ocean
- Segregated storage of chemical products, customs/excise warehousing
- Real time on-line information to the customers
- Independent laboratory analyses
- Commodity insurance, financing
- Customs formalities

## SERVICE PROVIDERS

- **Alexela Logistics** operates petrochemicals tank farm with total capacity of 28 000 cbm in ice free Paldiski South harbour (within Port of Tallinn). There are eight 3500 cbm heatable tanks with internal floating roofs with an option of nitrogen blanketing. One of the tanks has blender. Due to the availability of state-of-the-art equipment and a manifold unit, Alexela Logistics can store and process several product types at the same time guaranteeing complete segregation.
- **BCT (Baltic Chemical Terminal)** operates the chemicals tankfarm with total capacity of 120 000 tons in the ice free Port of Sillamäe (Silport). The location of the terminal and the adjacent plots is ideal for establishing a transhipment base due to the proximity to the border between the European Union and Russia (at a distance of 25 kilometres). BCT is the only terminal in the Baltic region able to tranship liquid ammonia and UAN.
- **Port of Sillamäe (Silport)** hosts the chemicals tank farms with total capacity of 175 500 tons. The location of the terminals is ideal for establishing a transhipment base due to the proximity to the border between the European Union and Russia (at a distance of 25 kilometres). Silport hosts the only terminal in the Baltic region able to tranship liquid ammonia and UAN.
- **Port of Tallinn** ice free Muuga harbour hosts one liquid chemicals terminal with total tank farm capacity of 78 550 cbm.

## CONTACT DETAILS

### Alexela Logistics

Roseni 13, 10111 Tallinn, Estonia  
**Telephone:** +372 615 4079  
**Fax:** +372 615 4068  
**E-mail:** info@alexelalogistics.eu  
**Web:** www.alexelalogistics.eu

### Port of Tallinn

Sadama 25, 15051 Tallinn, Estonia  
**Telephone:** +372 631 8555  
**Fax:** +372 631 8166  
**E-mail:** portoftallinn@portoftallinn.com  
**Web:** www.portoftallinn.com

### Port of Sillamäe (Silport)

Kesk 2, 40231 Sillamäe, Estonia  
**Telephone:** +372 640 5271  
**Fax:** +372 640 5279  
**E-mail:** silport@silport.ee  
**Web:** www.silport.ee

### BCT Ltl. (Baltic Chemical Terminal)

Narva Rd. 7d, 10117 Tallinn, Estonia  
**Telephone:** +372 66 46 505  
**Fax:** +372 62 61 100  
**E-mail:** bct@bct.ee  
**Web:** www.bct.ee



## A VALUE PROPOSITION

- Express rail transportation and advanced technologies for discharging rail cars and fast loading of vessels in the ice free Port of Tallinn result in the quickest transhipment lead times in the region
- Depth at the quays allows to load and discharge the largest LPG carriers until 13m draft, still the present capacity of the LPG tank farm is limited to 12 000 cbm with the area reserved for expansion
- Unique value added services and high flexibility of the terminal enable customers to trade in wide variety of products
- Modern technologies are used and various control systems enable to maintain the highest operational performance standards
- Appliance of specific techniques in order to guarantee safety of all processes and to preserve the required quality of products
- Fixed long term tariffs



## PRODUCT DESCRIPTION

- Full range of transhipment and hub services for LPG products like gas condensate, isoprene, butane etc.
- LPG rail transportation. The harmonized SMGS railway bill enables transportation of goods across the entire 1520 mm gauge rail network (CIS, Baltic countries, Mongolia, and Finland) and beyond on the basis of unified standards.
- Advanced technologies for discharging 18 rail tank cars simultaneously.
- Fast loading and discharging of LPG carriers with any size up to 13m draft (300 cbm/h per six inch line).
- Terminal works on schemes rail-ship, ship-rail, ship-terminal-ship and ship-to-ship.
- Segregated storage of LPG products, customs/excise warehousing.
- Value added services.
- Real time on-line information to the customers.
- Independent laboratory analyses (SAYBOLT).
- Commodity insurance, and financing.
- Customs formalities.

## SERVICE PROVIDERS

- **Alexela Logistics** operates a LPG tank farm with total capacity of 12 000 cbm in the ice free Paldiski South Harbour (within Port of Tallinn). Due to the availability of state-of-the-art equipment and a manifold unit, Alexela Logistics can store and process several product types at the same time guaranteeing complete segregation.
- **Port of Tallinn** offers suitable area in the ice free Muuga Harbour for development of a new LPG terminal.
- **EVR Cargo (affiliate of the Estonian Railways)**. Efficient logistics, flexible transport tariff policy, and sales strategy based on trust enable EVR Cargo to provide world class transport services to its customers. 56 powerful locomotives with US-origin are ready to carry up to 8000-ton trains. Total capacity of EVR Cargo is 50 million tons per year. Tariffs can be fixed for up to five years.

## CONTACT DETAILS

### Alexela Logistics

Roseni 13, 10111 Tallinn, Estonia

**Telephone:** +372 615 4079

**Fax:** +372 615 4068

**E-mail:** info@alexelalogistics.eu

**Web:** www.alexelalogistics.eu

### Port of Tallinn

Sadama 25, 15051 Tallinn, Estonia

**Telephone:** +372 631 8555

**Fax:** +372 631 8166

**E-mail:** portoftallinn@portoftallinn.com

**Web:** www.portoftallinn.com

### EVR Cargo

Toompuiestee 35, 15073 Tallinn, Estonia

**Telephone:** +372 6158 696

**Fax:** +372 6158 599

**E-mail:** cargo@evr.ee

**Web:** www.evr.ee

## A VALUE PROPOSITION

- Efficient rail transportation, advanced technologies for discharging rail cars and fast loading of vessels in the ice free ports result in quickest transshipment lead times and lowest cost in the region
- Depth at the quays allows to load and discharge the vessels up to Post Panamax size (dwt 150 000 tons) loaded until 17m draft which guarantee lowest total logistics cost per unit
- Unique value added services and high flexibility of the specialized terminals enable customers to trade globally with wide variety of commodities
- Modern technologies are used and various control systems enable to maintain the highest operational performance standards
- Appliance of specific techniques in order to guarantee safety of all processes and to preserve the required quality of products
- Fixed long term tariffs



## PRODUCT DESCRIPTION

- Full range of transshipment services for coal, fertilizers, grain, aggregates, scrap metal, woodchips, peat etc.
- Freight forwarding, road and rail transportation. The harmonised SMGS railway bill enables transportation of goods across the entire 1520 mm gauge rail network (Russia, CIS, Central Asia, Baltic countries, Mongolia, Finland) and beyond on the basis of unified standards.
- Safe and efficient storage facilities, advanced technologies for discharging rail cars and loading vessels.
- Fast loading and discharging of vessels with any size up to 17m draft (up to 2500 tons/h). Vessel draft survey and tallyman services.
- Segregated storage of products, customs warehousing, goods weighing (trucks & railway cars).
- Value added services like blending, packaging, goods radioactivity measurement and purity control etc.
- Real time on-line information to the customers, customs formalities, financing and commodity insurance.

## SERVICE PROVIDERS

- **DBT (Dry Bulk Terminal)** is one of the most modern fertilizers transshipment terminals in Europe with annual capacity of 2,3 million tons. DBT is located in the ice free Muuga Harbour (within Port of Tallinn).
- **Port of Tallinn** hosts one of the most modern fertiliser transshipment terminals in Europe with annual capacity of 2,3 million tons, two other dry bulk operators and coal terminals with total capacity of 7,5 million tons per year, a grain terminal with 5 million ton annual capacity, and several multifunctional terminals for other dry bulk commodities like aggregates, scrap metal, peat and wood pellets.
- **ESTEVE Terminal** is located in the ice free Paldiski South Harbour (within Port of Tallinn). Main dry bulk commodities handled are aggregates, scrap metal, peat and wood pellets
- **Port of Sillamäe (Silport)** is the most eastern ice free deep-sea port of the European Union, located only 25 km from the border between EU and Russian Federation. Dry bulk commodities handled are mainly aggregates, peat and scrap metal.
- **Paldiski Northern Port** is located 50 kilometres to the south west from Tallinn, close to the Paldiski South Harbour. Main dry bulk commodities handled are wood pellets and fertilisers.
- **EVR Cargo (railway operator, affiliate of Estonian Railways)**. Efficient logistics, flexible transport tariff policy, and sales strategy based on trust enable EVR Cargo to provide world class transport services to its customers. 56 powerful locomotives with US-origin are ready to carry up to 8000-ton trains. Total capacity of EVR Cargo is 50 million tons per year. Tariffs can be fixed for up to five years.

## CONTACT DETAILS

<b>EVR Cargo</b> Toompuiestee 35, 15073 Tallinn, Estonia <b>Telephone:</b> +372 6158 696 <b>Fax:</b> +372 6158 599 <b>E-mail:</b> cargo@evr.ee <b>Web:</b> www.evr.ee	<b>Port of Tallinn</b> Sadama 25, 15051 Tallinn, Estonia <b>Telephone:</b> +372 631 8555 <b>Fax:</b> +372 631 8166 <b>E-mail:</b> portoftallinn@portoftallinn.com <b>Web:</b> www.portoftallinn.com	<b>Paldiski Northern Port</b> Peetri 11, 76805 Paldiski, Estonia <b>Telephone:</b> +372 651 1010 <b>Fax:</b> +372 651 1011 <b>E-mail:</b> info@portofpaldiski.ee <b>Web:</b> www.portofpaldiski.com	<b>Port of Sillamäe (Silport)</b> Kesk 2, 40231 Sillamäe, Estonia <b>Telephone:</b> +372 640 5271 <b>Fax:</b> +372 640 5279 <b>E-mail:</b> silport@silport.ee <b>Web:</b> www.silport.ee
<b>ESTEVE Terminal</b> Rae põik 10, 76806 Paldiski, Estonia <b>Telephone:</b> +372 654 1500 <b>Fax:</b> +372 654 1502 <b>E-mail:</b> esteve@esteve.ee <b>Web:</b> www.esteve.ee	<b>DBT Ltd. (Dry Bulk Terminal)</b> Koorma 13, 74115 Tallinn, Estonia <b>Telephone:</b> +372 6319389 <b>Fax:</b> +372 6319189 <b>E-mail:</b> dbt@dbtmuuga.ee <b>Web:</b> www.dbtmuuga.ee		

# BREAK BULK / GENERAL CARGO TRANSHIPMENT, STORAGE & VALUE ADDING

## A VALUE PROPOSITION

- Due to its geographically advantageous location, Estonia is a perfect distribution centre (DC) providing effective access to a consumer market of 300 million
- Constant high service quality, reliability, responsiveness and flexibility are considered as a common standard. Estonian logistics system is working 24/7 all year round
- Efficient combinations of maritime, air, road and rail transportation, fast loading and discharging of vessels, rail cars, trucks and containers result in the quickest transshipment lead times and lowest total cost in the region
- Estonian ports are ice free. Depth at the quays allows to load and discharge the vessels up to Post Panamax size loaded until 14m draft.
- Estonian Railways are part of the 1520mm network. The harmonised SMGS railway bill enables transportation of goods across the entire 1520 mm (Russian) gauge rail network (CIS, Baltic countries, Mongolia, Finland) and beyond on the basis of unified standards. Tariffs can be fixed for up to 5 years.
- Unique value added services and high flexibility of the specialised terminals and warehouses enable customers to trade in wide variety of goods and commodities directly from the DC located in Estonia.



## PRODUCT DESCRIPTION

- Full range of transshipment, storage (including customs/excise), value adding services for break bulk and general cargoes like construction materials, metals, foodstuffs (including frozen), industrial commodities, packaged fertilizers, electronics, machinery, timber, paper, tyres, chemicals, beverages, tobacco, furniture, garment & apparel etc.
- Goods are shipped to Estonian DC-s from all origins by different transport modes, inspected, stored, picked & packed consolidated, and sent to the destinations based on customer orders. Overnight deliveries to Finland, Sweden, Latvia, Lithuania. Time definite transport services on request.
- Freight forwarding, maritime, air, road, and rail transportation.
- Transshipments between all modes of transport. Cross docking of goods from containers/trucks to rail cars with 72 ton payload enables to achieve considerable cost savings on transportation to long distance destinations in Russia, CIS and Central Asia.
- Fast loading and discharging of break bulk vessels with any size up to 14m draft. Vessel draft survey, tallyman services, and goods weighing (trucks & rail cars). Direct transshipments vessel-rail/truck and vice versa, or via warehouses.
- Safe and efficient storage facilities, advanced warehousing technologies, and real time on-line overview of the status of the goods. Webcam support is provided on request.
- Value added services like blending, packaging, labelling, subassembly, fumigation, quality inspection etc.
- Customs formalities, financing and cargo insurance. Customs clearance in the countries of destination upon request.

## CONTACT DETAILS

<b>CF&amp;S Estonia (CF&amp;S)</b> Ahtri 12, 10151 Tallinn, Estonia <b>Telephone:</b> +372 666 4400 <b>Fax:</b> +372 666 4444 <b>E-mail:</b> cfs@cfs.ee <b>Web:</b> www.cfs.ee	<b>ESTEVE Terminal</b> Rae põik 10, 76806 Paldiski, Estonia <b>Telephone:</b> +372 654 1500 <b>Fax:</b> +372 654 1502 <b>E-mail:</b> esteve@esteeve.ee <b>Web:</b> www.esteeve.ee	<b>Contimer LLC</b> Masina 11, 10144 Tallinn, Estonia <b>Telephone:</b> +372 605 0555 <b>Fax:</b> +372 605 0550 <b>E-mail:</b> info@contimer.ee <b>Web:</b> www.contimer.ee	<b>Alekon Cargo LLC</b> Saha-Loo 5B, 74114 Maardu, Estonia <b>Telephone:</b> +372 638 8977 <b>Fax:</b> +372 638 8998 <b>E-mail:</b> cargo@alekon.ee <b>Web:</b> www.alekon.ee
<b>EVR Cargo</b> Toompuiestee 35, 15073 Tallinn, Estonia <b>Telephone:</b> +372 6158 696 <b>Fax:</b> +372 6158 599 <b>E-mail:</b> cargo@evr.ee <b>Web:</b> www.evr.ee	<b>Smarten Logistics</b> Uus-Süti, 75301 Rae vald, Estonia <b>Telephone:</b> +372 6135 800 <b>Fax:</b> +372 6135 850 <b>E-mail:</b> info@smarten.ee <b>Web:</b> www.smarten.ee	<b>RRK – State Resources Centre.</b> Rävala 8, 10143 Tallinn, Estonia <b>Telephone:</b> +372 666 3111 <b>Fax:</b> +372 666 3110 <b>E-mail:</b> rrk@rrk.ee <b>Web:</b> www.rrk.ee	<b>Tallinn Airport</b> Lennujaama 2, 11101 Tallinn, Estonia <b>Telephone 1:</b> +372 605 8700 <b>Telephone 2:</b> +372 605 8701 <b>E-mail:</b> administration@tll.aero <b>Web:</b> www.tallinn-airport.ee
<b>Port of Tallinn</b> Sadama 25, 15051 Tallinn, Estonia <b>Telephone:</b> +372 631 8555 <b>Fax:</b> +372 631 8166 <b>E-mail:</b> portoftallinn@portoftallinn.com <b>Web:</b> www.portoftallinn.com	<b>Port of Sillamäe (Silport)</b> Kesk 2, 40231 Sillamäe, Estonia <b>Telephone:</b> +372 640 5271 <b>Fax:</b> +372 640 5279 <b>E-mail:</b> silport@silport.ee <b>Web:</b> www.silport.ee	<b>Paldiski Northern Port</b> Peetri 11, 76805 Paldiski, Estonia <b>Telephone:</b> +372 651 1010 <b>Fax:</b> +372 651 1011 <b>E-mail:</b> info@portofpaldiski.ee <b>Web:</b> www.portofpaldiski.com	

## A VALUE PROPOSITION

- Due to its geographically advantageous location, Estonia is a perfect distribution centre (DC) providing effective access to a consumer market of 300 million
- As the segment of intermodal transportation is growing rapidly, all state of the art technologies, logistics and ICT systems are in place for the transshipment and transportation of container flows from all continents with main destinations in Russia, CIS and Central Asia.
- Estonian ports are ice free. Depth at the quays allows to load and discharge container vessels up to Post Panamax size loaded until 14 m draft.
- Regular block train services connect Estonian ports with the hinterland
- Estonian Railways are part on 1520 mm network (Russian gauge). The harmonised SMGS railway bill enables transportation of goods across the entire 1520 mm gauge rail network (Russia, CIS, Central Asia) and beyond based on unified standards. Tariffs can be fixed for up to 5 years.
- Efficient combinations of sea, road and rail transportation, quick loading and discharging of vessels, rail cars and trucks result in the quickest transshipment lead times and lowest total cost in the region.
- Stable high service quality, reliability, responsiveness and flexibility are considered a common standard. Estonian logistics system is working and handling container flows 24/7 all year round.



## PRODUCT DESCRIPTION

- Freight forwarding, transshipment, sea, road and rail transportation of containers (20', 40', 45'). Corridors serviced are Asia Pacific-Russia/CIS, Europe-Russia/CIS/Central Asia, Americas-Russia/CIS/Central Asia, but also Finland-Turkey and Finland-Austria.
- Contemporary container terminal in Muuga Harbour free zone (Port of Tallinn) with 50 ha of territory and quay line of one kilometre. Areas available close to container terminal for distribution centres.
- All major container lines are calling Muuga Harbour with their own or public feeders.
- Three other Estonian ports have capabilities for container handling: Paldiski South Harbour (within the Port of Tallinn), Port of Sillamäe (Silport) and Paldiski Northern Port.
- Direct transshipments vessel-rail/truck and vice versa, or via terminals.
- Regular block train services from Estonia to Moscow, Central Asia, Afghanistan, Belarus, Ukraine (with feeder connection to Turkey), Latvia, Lithuania, Poland and Austria. Unique 80' rail platforms are being used for certain services.
- Cross docking of goods from containers to rail cars with 72 tons payload enables to achieve considerable cost savings on transportation over long distances to destinations in Russia, CIS and Central Asia.
- Customs formalities, financing and cargo insurance. Customs clearance and door deliveries in the counties of destination on request. LCL (less than a container load) services of all origins.
- Full range of container depot and yard services.

## CONTACT DETAILS

<b>CF&amp;S Estonia (CF&amp;S)</b> Ahtri 12, 10151 Tallinn, Estonia <b>Telephone:</b> +372 666 4400 <b>Fax:</b> +372 666 4444 <b>E-mail:</b> cfs@cfs.ee <b>Web:</b> www.cfs.ee	<b>ESTEVE Terminal</b> Rae põik 10, 76806 Paldiski, Estonia <b>Telephone:</b> +372 654 1500 <b>Fax:</b> +372 654 1502 <b>E-mail:</b> esteve@esteve.ee <b>Web:</b> www.esteve.ee	<b>Contimer LLC</b> Masina 11, 10144 Tallinn, Estonia <b>Telephone:</b> +372 605 0555 <b>Fax:</b> +372 605 0550 <b>E-mail:</b> info@contimer.ee <b>Web:</b> www.contimer.ee	<b>Alekon Cargo LLC</b> Saha-Loo 5B, 74114 Maardu, Estonia <b>Telephone:</b> +372 638 8977 <b>Fax:</b> +372 638 8998 <b>E-mail:</b> cargo@alekon.ee <b>Web:</b> www.alekon.ee
<b>Port of Tallinn</b> Sadama 25, 15051 Tallinn, Estonia <b>Telephone:</b> +372 631 8555 <b>Fax:</b> +372 631 8166 <b>E-mail:</b> portoftallinn@portoftallinn.com <b>Web:</b> www.portoftallinn.com	<b>Port of Sillamäe (Silport)</b> Kesk 2, 40231 Sillamäe, Estonia <b>Telephone:</b> +372 640 5271 <b>Fax:</b> +372 640 5279 <b>E-mail:</b> silport@silport.ee <b>Web:</b> www.silport.ee	<b>Paldiski Northern Port</b> Peetri 11, 76805 Paldiski, Estonia <b>Telephone:</b> +372 651 1010 <b>Fax:</b> +372 651 1011 <b>E-mail:</b> info@portofpaldiski.ee <b>Web:</b> www.portofpaldiski.com	<b>EVR Cargo</b> Toompuiestee 35, 15073 Tallinn, Estonia <b>Telephone:</b> +372 6158 696 <b>Fax:</b> +372 6158 599 <b>E-mail:</b> cargo@evr.ee <b>Web:</b> www.evr.ee
<b>Baltic Rail Ltd</b> Toompuiestee 35, 10149 Tallinn, Estonia <b>Telephone:</b> +372 661 3120 <b>Fax:</b> +372 661 3121 <b>E-mail:</b> vadim.shabarov@balticrail.com <b>Web:</b> www.BalticRail.com			



## A VALUE PROPOSITION

- As an alternative to the road transport, Baltic Sea is widely used for taking the general cargo shipments in semitrailers and on mafi/cassette trailers from Europe to Estonia and continuing from here via road to Russia and CIS. The distance to St.Petersburg is only 400 km and to Moscow only 1000 km from the main Estonian ro-ro ports.
- Estonian ports are ice free. This allows ro-ro lines to stay in schedules also during the coldest winters.
- Regular short sea services create a motorway of the sea between Estonia and all the main ro-ro ports around the Baltic and North Sea.
- Busy ro-pax connections with Finland and Sweden allow for overnight trailer deliveries from Estonian distribution centres (DC-s).
- Constant high service quality, reliability, responsiveness and flexibility are considered as a common standard. Estonian logistics system is working and handling trailers 24/7 all year round.



## PRODUCT DESCRIPTION

- FTL (full trailer load) and LTL (less than a trailer load) services to/from all over Europe.
- Regular ro-ro/ro-pax lines calling Estonian ports: Transfennica, Mann Lines, Tallink Silja, Spliethoff (Paldiski South Harbour), Viking Line, Eckerö Line, Tallink Silja, St.Peter's Line (Tallinn Old City Harbour), Baltic Scandinavian Lines, Navirail (Paldiski Northern Port)
- Estonian Ports have direct ro-ro/ro-pax connections to Finland, Sweden, Germany, United Kingdom, Belgium, and USA
- Semitrailers arriving from Europe and Scandinavia to Estonian ports on ro-ro/ro-pax vessels are unloaded to the terminal. Trailers are inspected and verified against the documents.
- Trucks are provided for taking the trailers to their destinations in Estonia, Baltics, Russia and CIS.
- Customs clearance and to the door deliveries in the counties of destination.
- Time definite deliveries and real time GPS track & trace are available upon request.
- Empty trailers are reloaded with outbound shipments and trailers are returned to the port for loading to the vessel.
- Heavy goods like paper reels, timber, metals etc, but also high & heavy goods are loaded on the mafi-trailers or cassettes with payloads up to 140 tons, and loaded/discharged to/from ro-ro vessels with terminal tractors.
- Cross docking of goods from trailers to rail cars with 72 ton payload enables to achieve considerable cost savings on transportation on long distances to the destinations in Russia, CIS and Central Asia. The Estonian Railways are part of the 1520mm network. The harmonised SMGS railway bill enables transportation of goods across the entire 1520 mm (Russian) gauge rail network (Russia, CIS, Central Asia) and beyond on the basis of unified standards. Rail tariffs can be fixed for up to five years.
- Customs formalities, financing and cargo insurance.
- Full range of trailer maintenance services.

## CONTACT DETAILS



### CF&S Estonia (CF&S)

Ahtri 12, 10151 Tallinn, Estonia  
**Telephone:** +372 666 4400  
**Fax:** +372 666 4444  
**E-mail:** cfs@cfs.ee  
**Web:** www.cfs.ee

### ESTEVE Terminal

Rae põik 10, 76806 Paldiski, Estonia  
**Telephone:** +372 654 1500  
**Fax:** +372 654 1502  
**E-mail:** esteve@esteven.ee  
**Web:** www.esteve.ee

### Baltic Rail Ltd

Toompuiestee 35, 10149 Tallinn, Estonia  
**Telephone:** +372 661 3120  
**Fax:** +372 661 3121  
**E-mail:** vadim.shabarov@balticrail.com  
**Web:** www.BalticRail.com

### Port of Tallinn

Sadama 25, 15051 Tallinn, Estonia  
**Telephone:** +372 631 8555  
**Fax:** +372 631 8166  
**E-mail:** portoftallinn@portoftallinn.com  
**Web:** www.portoftallinn.com

### Port of Sillamäe (Silport)

Kesk 2, 40231 Sillamäe, Estonia  
**Telephone:** +372 640 5271  
**Fax:** +372 640 5279  
**E-mail:** silport@silport.ee  
**Web:** www.silport.ee

### Paldiski Northern Port

Peetri 11, 76805 Paldiski, Estonia  
**Telephone:** +372 651 1010  
**Fax:** +372 651 1011  
**E-mail:** info@portofpaldiski.ee  
**Web:** www.portofpaldiski.com

### Contimer LLC

Masina 11, 10144 Tallinn, Estonia  
**Telephone:** +372 605 0555  
**Fax:** +372 605 0550  
**E-mail:** info@contimer.ee  
**Web:** www.contimer.ee

### Alekon Cargo LLC

Saha-Loo 5B, 74114 Maardu, Estonia  
**Telephone:** +372 638 8977  
**Fax:** +372 638 8998  
**E-mail:** cargo@alekon.ee  
**Web:** www.alekon.ee

### EVR Cargo

Toompuiestee 35, 15073 Tallinn, Estonia  
**Telephone:** +372 6158 696  
**Fax:** +372 6158 599  
**E-mail:** cargo@evr.ee  
**Web:** www.evr.ee

## A VALUE PROPOSITION

- Dedicated car terminals in Estonian ice free ports, quick discharging of car carriers without any limitations to the vessel size combined with fast loading of car trains and trailers result in the shortest transshipment lead times in the region
- Depth at the quays, wide shore ramps and large storage areas allow to receive and discharge the worlds biggest car carriers (8000+ cars). Such economy of scale guarantees lowest total logistics cost per car
- Annual technical capacity of Estonian ports, car terminals and transport system is 750 000 cars.
- Cars from Asia, Europe and Americas are distributed from the terminals in Estonian ports by road and rail to the Baltic States, Russia, CIS and Central Asia
- Modern technologies are used and various control systems enable to maintain the highest operational performance and safety standards



## PRODUCT DESCRIPTION

- Full range of transshipment, terminal and distribution centre services for new and also second hand cars
- Present key accounts are Toyota, Mercedes Benz, Maybach, Ford, Nissan, Volvo, Mazda, Subaru, Jaguar, Land Rover, KIA, Fiat, Peugeot and Hyundai
- Estonian ports have been called by following car carriers (PCC & PCTC): Wallenius Wilhelmsen, K-Line, Eukor and UEC
- Road transportation with special car trailers. For exclusive cars unique closed car trailers are used.
- Time definite express deliveries with transit time of 72 hours (including customs clearance in Russia) from the Estonian car terminal to the dealer's premises in Moscow
- Rail transportation with special double deck rail cars. The harmonised SMGS railway bill enables transportation of goods across the entire 1520 mm (Russian) gauge rail network (Russia, CIS, Central Asia) and beyond on the basis of unified standards
- Real time on-line information to the customers, GPS based stock management systems, track & trace
- Customs formalities in Estonia and in the countries of destination
- Pre-delivery inspection services (PDI) and post-production options (PPO). There are two dedicated PDI-centres in the Paldiski South Harbour (within the Port of Tallinn)
- Insurance & financing

## SERVICE PROVIDERS

- **CF&S Estonia** is the largest logistics group in Estonia specialized in car transportation. CF&S owns a fleet of car trailers and special rail wagons with high loading decks for transporting cars to Russia, CIS and Central Asia.
- **ESTEVE Terminal** is a leading ro-ro and car terminal operator in the ice free Paldiski South Harbour (within the Port of Tallinn).
- **Paldiski South Harbour (Port of Tallinn)** has two dedicated terminals which provide transshipment, storage, PDI and PPO services.
- **Paldiski Northern Port** operates a car terminal in the Paldiski Free Zone and customs terminals on Estonian-Russian border (Koidula-Kunichina Gora) on both sides of the border.
- **Port of Sillamäe (Silport)** is the closest to Russia ice free deep-sea transshipment port for cars due to the proximity to the border between the European Union and Russia (at a distance of 25 kilometres). There are terminal areas available for storing 50 000 cars at the time. Entire territory of the port is located within the Free Zone.
- **EVR Cargo (affiliate of Estonian Railways)**. Efficient logistics, flexible transport tariff policy, and sales strategy based on trust enable EVR Cargo to provide world class transport services to its customers. Tariffs can be fixed for up to five years.

## CONTACT DETAILS

### CF&S Estonia (CF&S)

Ahtri 12, 10151 Tallinn, Estonia  
**Telephone:** +372 666 4400  
**Fax:** +372 666 4444  
**E-mail:** cfs@cfs.ee  
**Web:** www.cfs.ee

### ESTEVE Terminal

Rae põik 10, 76806 Paldiski, Estonia  
**Telephone:** +372 654 1500  
**Fax:** +372 654 1502  
**E-mail:** esteve@esteve.ee  
**Web:** www.esteve.ee

### Port of Tallinn

Sadama 25, 15051 Tallinn, Estonia  
**Telephone:** +372 631 8555  
**Fax:** +372 631 8166  
**E-mail:** portoftallinn@portoftallinn.com  
**Web:** www.portoftallinn.com

### Paldiski Northern Port

Peetri 11, 76805 Paldiski, Estonia  
**Telephone:** +372 651 1010  
**Fax:** +372 651 1011  
**E-mail:** info@portofpaldiski.ee  
**Web:** www.portofpaldiski.com

### Port of Sillamäe (Silport)

Kesk 2, 40231 Sillamäe, Estonia  
**Telephone:** +372 640 5271  
**Fax:** +372 640 5279  
**E-mail:** silport@silport.ee  
**Web:** www.silport.ee

### EVR Cargo

Toompuiestee 35, 15073 Tallinn, Estonia  
**Telephone:** +372 6158 696  
**Fax:** +372 6158 599  
**E-mail:** cargo@evr.ee  
**Web:** www.evr.ee

# TRANSHIPMENT OF OFF-ROAD MACHINES, TRUCKS AND BUSES

## A VALUE PROPOSITION

- Dedicated terminals in Estonian ice free ports, quick discharging and loading of ro-ro vessels/PCTCs (Pure Car and Truck Carriers) combined with fast loading and fastening of equipment on the rail platforms and low-bed trailers result in the shortest transshipment lead times in the region
- Depth at the quays, wide shore ramps and large storage areas allow to receive and discharge the world's biggest PCTC. Such economy of scale guarantees lowest total logistics cost per unit
- Mobile cranes with lifting capacity of 100 tons enable easy loading and unloading of heavy (over 30 tons) machines to/from rail platforms and trailers
- Proper techniques are used and various control systems enable to maintain the highest operational performance and safety standards



## PRODUCT DESCRIPTION

- Full range of transshipment, terminal and distribution centre services for new and second hand off-road (agricultural, industrial, mining, construction, military etc) machines, trucks and buses
- Off-road machines, trucks and buses from Asia, Europe and Americas are distributed from the terminals in Estonian ports by road and rail to the Baltic States, Russia, CIS, Central Asia and Afghanistan.
- Machines, trucks and buses manufactured in Russia and CIS are transhipped from rail to vessels with destinations all over the globe.
- Fast discharging and loading of ro-ro vessels and PCTCs without any limitations to the vessel size in Estonian ice free ports.
- Estonian ports are regularly called by following ro-ro lines: Transfennica, Mann Lines, Tallink Silja, Spliethoff (Paldiski South Harbour), Viking Line, Eckerö Line, Tallink Silja, St.Peter's Line (Tallinn Old City Harbour), Baltic Scandinavian Lines, Navirail (Paldiski Northern Port)
- Estonian ports have been called by following car and truck carriers: Wallenius Wilhelmsen, K-Line, Eukor and UECC
- Loading and unloading off-road machines, trucks and buses to/from the trailers and rail platforms with the use of loading ramps and 100 ton cranes in case of heavier than 30 tons units
- Dismantling of wheels etc parts in order to fit into dimension limits
- Fastening of the equipment on the trailers and rail platforms according to the road and railway technical regulations and safety standards
- Road transportation with special low-bed trailers for high & heavy machinery
- Rail transportation. The harmonised SMGS railway bill enables transportation of goods across the entire 1520 mm (Russian) gauge rail network (Russia, CIS, Central Asia) and beyond on the basis of unified standards
- Real time on-line information to the customers
- Arranging customs formalities and arranging all necessary permits in Estonia, Russia, CIS, Central Asia and Afghanistan
- Pre-delivery inspection (PDI) services
- Insurance & financing

## CONTACT DETAILS

<b>CF&amp;S Estonia (CF&amp;S)</b> Ahtri 12, 10151 Tallinn, Estonia <b>Telephone:</b> +372 666 4400 <b>Fax:</b> +372 666 4444 <b>E-mail:</b> cfs@cfs.ee <b>Web:</b> www.cfs.ee	<b>ESTEVE Terminal</b> Rae põik 10, 76806 Paldiski, Estonia <b>Telephone:</b> +372 654 1500 <b>Fax:</b> +372 654 1502 <b>E-mail:</b> esteve@esteve.ee <b>Web:</b> www.esteve.ee	<b>Baltic Rail Ltd</b> Toompuiestee 35, 10149 Tallinn, Estonia <b>Telephone:</b> +372 661 3120 <b>Fax:</b> +372 661 3121 <b>E-mail:</b> vadim.shabarov@balticrail.com <b>Web:</b> www.BalticRail.com	<b>Alekon Cargo LLC</b> Saha-Loo 5B, 74114 Maardu, Estonia <b>Telephone:</b> +372 638 8977 <b>Fax:</b> +372 638 8998 <b>E-mail:</b> cargo@alekon.ee <b>Web:</b> www.alekon.ee
<b>Port of Tallinn</b> Sadama 25, 15051 Tallinn, Estonia <b>Telephone:</b> +372 631 8555 <b>Fax:</b> +372 631 8166 <b>E-mail:</b> portoftallinn@portoftallinn.com <b>Web:</b> www.portoftallinn.com	<b>Port of Sillamäe (Silport)</b> Kesk 2, 40231 Sillamäe, Estonia <b>Telephone:</b> +372 640 5271 <b>Fax:</b> +372 640 5279 <b>E-mail:</b> silport@silport.ee <b>Web:</b> www.silport.ee	<b>Paldiski Northern Port</b> Peetri 11, 76805 Paldiski, Estonia <b>Telephone:</b> +372 651 1010 <b>Fax:</b> +372 651 1011 <b>E-mail:</b> info@portofpaldiski.ee <b>Web:</b> www.portofpaldiski.com	<b>EVR Cargo</b> Toompuiestee 35, 15073 Tallinn, Estonia <b>Telephone:</b> +372 6158 696 <b>Fax:</b> +372 6158 599 <b>E-mail:</b> cargo@evr.ee <b>Web:</b> www.evr.ee

## A VALUE PROPOSITION

- Depth at the quays in Estonian ice free ports, wide and flat ro-ro ramps, cranes with lifting capacity of 100 tons, 1520mm rail tracks on the quays and large storage areas allow to tranship all high & heavy, extra long and extra large project cargo units to/from Baltics, Russia, CIS, and Central Asia
- Technologically state of the art terminals in the Estonian ports, quick discharging and loading of vessels combined with fast loading and fastening of equipment on the rail platforms and low-bed trailers, and congestion-free road network result in the shortest transhipment lead times and lowest cost in the region
- Regular container and ro-ro lines calling Estonian ports offer flexible access by sea, so often there are cost effective alternatives to the expensive charters
- Proper techniques and special technologies are used. Various control systems enable to maintain the highest operational performance and safety standards



## PRODUCT DESCRIPTION

- Project cargo examples transported and transhipped by Estonian logistics companies: parts of wind generators and power stations, equipment for oil & gas industry, machinery, large metal and concrete constructions, yachts and boats, modular houses and factory sections, storage tanks for liquids, portal cranes, locomotives and railcars, large engines etc
- Services provided, but not limited to: Selecting the optimum transport facility and their combination; door-to-door maritime, road, railway and air freights; engineering preparations of drawings and technical calculations; devising of the loading/lashing schemes; contracting 3rd parties; supervision and survey reports at discharging / transhipment / loading / lashing; arranging security guards convoy.
- High, heavy, extra long and/or extra wide project cargo units are transported by suitable deep- and/or short sea vessels from their ports of origin to the Estonian ice free ports, where the cargo is transhipped to low-bed trailers or rail platforms, fastened and transported to the destinations in the Baltic States, entire Russia, CIS and Central Asia by road and rail. Same works also vice versa, from the Baltic States, Russia, CIS and Central Asia to the destinations all over the world
- Depth at the quays allows to load and discharge the vessels until 17m draft
- For loading and unloading heavy units to/from the vessels, trailers and rail platforms 100 ton cranes are used. If necessary, multiple cranes are used for lifting extra heavy units
- Handling, lashing, securing and welding operations on vessels, trailers and rail platforms according to the maritime, road and railway technical regulations and safety standards
- Road transportation with special trailers for high, long, wide & heavy units
- Rail transportation. Harmonised SMGS railway bill enables transportation of goods across the entire 1520 mm gauge rail network (Russia, CIS, Central Asia) and beyond on the basis of unified standards
- Arranging customs formalities and obtaining necessary approvals/permits from relevant authorities in Estonia, Russia, CIS and Central Asia
- If necessary, construction and electrical works in case the measures of the transported units demand it
- Daily monitoring/reports on the location of the goods and forwarding information to the customers
- Insurance & financing

## CONTACT DETAILS

<b>CF&amp;S Estonia (CF&amp;S)</b> Ahtri 12, 10151 Tallinn, Estonia <b>Telephone:</b> +372 666 4400 <b>Fax:</b> +372 666 4444 <b>E-mail:</b> cfs@cfs.ee <b>Web:</b> www.cfs.ee	<b>ESTEVE Terminal</b> Rae põik 10, 76806 Paldiski, Estonia <b>Telephone:</b> +372 654 1500 <b>Fax:</b> +372 654 1502 <b>E-mail:</b> esteve@esteve.ee <b>Web:</b> www.esteve.ee	<b>Baltic Rail Ltd</b> Toompuiestee 35, 10149 Tallinn, Estonia <b>Telephone:</b> +372 661 3120 <b>Fax:</b> +372 661 3121 <b>E-mail:</b> vadim.shabarov@balticrail.com <b>Web:</b> www.BalticRail.com	<b>Alekon Cargo LLC</b> Saha-Loo 5B, 74114 Maardu, Estonia <b>Telephone:</b> +372 638 8977 <b>Fax:</b> +372 638 8998 <b>E-mail:</b> cargo@alekon.ee <b>Web:</b> www.alekon.ee
<b>Port of Tallinn</b> Sadama 25, 15051 Tallinn, Estonia <b>Telephone:</b> +372 631 8555 <b>Fax:</b> +372 631 8166 <b>E-mail:</b> portoftallinn@portoftallinn.com <b>Web:</b> www.portoftallinn.com	<b>Port of Sillamäe (Silport)</b> Kesk 2, 40231 Sillamäe, Estonia <b>Telephone:</b> +372 640 5271 <b>Fax:</b> +372 640 5279 <b>E-mail:</b> silport@silport.ee <b>Web:</b> www.silport.ee	<b>Paldiski Northern Port</b> Peetri 11, 76805 Paldiski, Estonia <b>Telephone:</b> +372 651 1010 <b>Fax:</b> +372 651 1011 <b>E-mail:</b> info@portofpaldiski.ee <b>Web:</b> www.portofpaldiski.com	<b>EVR Cargo</b> Toompuiestee 35, 15073 Tallinn, Estonia <b>Telephone:</b> +372 6158 696 <b>Fax:</b> +372 6158 599 <b>E-mail:</b> cargo@evr.ee <b>Web:</b> www.evr.ee
<b>Contimer LLC</b> Masina 11, 10144 Tallinn, Estonia <b>Telephone:</b> +372 605 0555 <b>Fax:</b> +372 605 0550 <b>E-mail:</b> info@contimer.ee <b>Web:</b> www.contimer.ee			



## A VALUE PROPOSITION

- By using a third party FMCG contract logistics platform, you will be able to make your products instantly available all over the network
- Besides distribution, warehousing and value added logistics, services include inventory management, demand forecasting, purchasing, campaign management and credit handling
- Therefore the manufacturers and brand owners are able to make their products available on the market without a need for a proprietary logistics setup and a local administrative unit
- Full EDI support both down- and upstream allows to save time, lower the costs and increase accuracy
- Services are provided 24/7 all year round
- Core values: Reliability, Devotion, Initiative, Consideration



## PRODUCT DESCRIPTION

- **Receipt of goods.** For the receipt of goods an enhanced scanner-system and storage solution is used. With the advantage of this system, a complete record of received goods and pallets is kept and placing of pallets to the warehouses is managed. Besides the abovementioned, movement of product flows from pick-up areas to storage areas is controlled. Wireless hand-held terminals with barcode readers are used. When receiving goods, the amount of goods, GS1 code, best before as well as any other information relevant to a product is checked. At receipt of goods all required customs operations are carried out, the import taxes are paid, and the products are stored in a bonded, an excise or a regular warehouse.
- **Storage.** In general the products are stored on EUR-pallets. A warehouse for small products is available for the storage of small-sized goods. Besides the abovementioned, it is possible to store products requiring cooling that are stored at temperatures +2...+6 °C.
- **Inventory management and purchasing** service enables customers to use the help of experts with calculating the optimal stock and placing orders. Statistics based computer program considers the possible delays in the transportation of the goods, divides the products to various ABC categories, calculates the order date, completes the truck with the proper products, and performs many other operations essential for excellent stock management.
- **Picking.** The products are delivered in full pallets or re-packed according to the order of the partner/client. The products can also be selected by piece, i.e. smaller quantities than the common wholesale package can be sent to the clients. This is especially necessary with expensive products, such as alcohol or cosmetics.
- **Transportation** to destination includes all necessary procedures from loading the products onto a truck to sending the signed and accepted invoice or waybill back to the partner. Just-In-Time and reverse logistics services are offered.
- **Value-Added Services.** Labelling goods with product information in necessary languages (name, ingredients, etc.), preparing pallets according to the manufacturer's (partner's) directions, providing campaign wrappings (for example two products wrapped in a gift package), adding security elements, and labelling goods with foreign tax labels.
- **Credit Handling** services with or without the credit risk enable foreign customers to sell their goods without the need for opening their own local branch or subsidiary.

## SERVICE PROVIDER

**Smarten Logistics** is the largest third party FMCG (fast moving consumer goods) contract logistics service provider in Estonia with a strong client base including manufacturers, distributors as well as retail businesses.

Smarten Logistics operates on 30 000 sqm warehouse space. Effective distribution range is within 1000 km from Tallinn, including all Baltic States, Finland, Sweden and North-Western part of Russia.



## CONTACT DETAILS

### **Smarten Logistics**

Uus-Suti, 75301 Rae vald, Estonia

**Telephone:** +372 6135 800

**Fax:** +372 6135 850

**E-mail:** info@smarten.ee

**Web:** www.smarten.ee

## A VALUE PROPOSITION

- Under the pressure of increasing demand and volumes, renting rolling stock may be the only way for maintaining the service level your customers have come to expect from you
- We offer a wide choice of rail tank-cars for carrying oil products and liquefied petroleum gas (LPG), covered and open-top rail cars
- Over 4100 rail tank-cars for rent to be used on entire 1520mm rail network (Russian gauge)
- Powerful locomotives C36-7i with US origin are ready to carry up to 8 000 ton trains
- Long rental terms allow customers to realize the benefits and recover the costs of switching to alternative new or used rolling stock over an extended period



## PRODUCT DESCRIPTION

- Types of the rail tank-cars for rent:  
Only light oil products: 15-1443-06, 15-1547-03, 15-776  
All oil products: 15-150-01, 15-150-02, 15-5103-05, 15-740, 15-1566-06  
LPG: 15-1566-06
- Other types of rail cars for rent: covered rail cars, open-top rail cars
- Locomotives for rent: C36-7i, 2ТЭ116
- Shunting (switch) locomotives for rent: ЧМЭ-3

## SERVICE PROVIDERS

- **Spacecom** is one of the biggest owners of rail tank-cars in the Baltic region. Spacecom can offer for rent over 4100 rail tank-cars for the carriage of any oil products and liquefied petroleum gas (LPG) and eight locomotives. Spacecom owns the Locomotive Repairs Depot and can provide any kind of repairs of locomotives. Spacecom also holds the controlling interest in the Daugavpils Locomotive Plant, which is one of the largest in Europe and offers the full repair service of locomotives.
- **Estonian Railways** is the national rail company. The wagon fleet consists of more than 3300 covered rail cars, open-top rail cars, tank-cars, container platforms and several other types of wagons. On 14 January 2009 the Estonian Railways set up two affiliates: EVR Infra and EVR Cargo. The subsidiaries became a part of a group of companies working under the control of the Estonian Railways. Efficient logistics, flexible transport tariff policy, and sales strategy based on trust enable AS EVR Cargo to provide world class transport services to its customers. Powerful locomotives C36-7i with US origin are ready to carry up to 8 000 ton trains. Compliance with security requirements meeting the European standards and tight cooperation with other links of the logistics chain ensure prompt arrival of your goods at any location in the world.



## CONTACT DETAILS

### Estonian Railways

Toompuiestee 35, 15073 Tallinn, Estonia

**Telephone:** +372 615 8610

**Fax:** +372 615 8710

**E-mail:** [raudtee@evr.ee](mailto:raudtee@evr.ee)

**Web:** [www.evr.ee](http://www.evr.ee)

### Spacecom

Mõisa 4, 13522 Tallinn, Estonia

**Telephone:** +372 678 8240

**Fax:** +372 678 8246

**E-mail:** [info@spacecom.ee](mailto:info@spacecom.ee)

**Web:** [www.spacecom.ee](http://www.spacecom.ee)

## A VALUE PROPOSITION

- Technical capabilities, near 150 years of experience, high quality of service combined with affordability makes us the first choice when it comes to the rolling stock repairs
- Repairs and modernisation of all types of locomotives
- Repairs of all classes of rail cars
- Overhaul for prolongation of service life for electric passenger trains with an improvement of interior
- Manufacture of spare parts needed for rolling stock repairs



## PRODUCT DESCRIPTION

- **Locomotives repair services:** maintenance, repair and modernisation of locomotives; maintenance and repair of locomotive assemblies and units; paint removal and repainting of locomotives
- **Freight wagons repair services:** current repairs, depot repairs and overhauls of freight wagons; extending the service life of freight wagons; repair of parts and units of freight wagons; extending the service life of 18-100 bogies; repair of 18-100 bogies and installation of wear-proof elements; basic and full inspection of wagon wheel sets; assembly of wagon wheel sets; paint removal and repainting of wagons
- **Repairs of passenger trains:** overhaul with prolongation of service for electric passenger trains with an improvement of interior
- **Other services:** turning of rolling surfaces on rolling stock wheel sets; turning of rolling surfaces on rolling stock wheel sets under the rolling stock; turning and milling of metals; cutting of metals; cleaning and painting of metal structures; welding; manufacturing spare parts

## SERVICE PROVIDERS

- **Estonian Railways** is the national rail company. On January 14, 2009 the Estonian Railways set up two affiliates: EVR Infra and EVR Cargo. The subsidiaries became part of a group of companies working under the control of the Estonian Railways. EVR Cargo Tapa Depots with their 135 years of history are among the oldest and most unique ventures that are still operating in the region of 1520 mm (Russian) track gauge. Tapa Depot is being run 90 km east of Tallinn on an area of 19 ha with 8 000 sq m of plant area.
- **Spacecom** is one of the biggest owners of rail tank-cars in the Baltic region. Spacecom can offer for rent over 4100 rail tank-cars for the carriage of any oil products and liquefied petroleum gas (LPG) and eight locomotives. Spacecom owns the Locomotive Repairs Depot and can provide any kind of repairs for locomotives. Spacecom also holds the controlling interest in the Daugavpils Locomotive Plant, which is one of the largest in Europe and offers the full repair service for locomotives.



## CONTACT DETAILS

### Estonian Railways

Toompuiestee 35, 15073 Tallinn, Estonia  
**Telephone:** +372 615 8610  
**Fax:** +372 615 8710  
**E-mail:** raudtee@evr.ee  
**Web:** www.evr.ee

### Spacecom

Mõisa 4, 13522 Tallinn, Estonia  
**Telephone:** +372 678 8240  
**Fax:** +372 678 8246  
**E-mail:** info@spacecom.ee  
**Web:** www.spacecom.ee



## A VALUE PROPOSITION

- Reliable and efficient ex barge bunker fuel supply at the best price while staying at the quayside in one of the Estonian ports or on the road
- Modern technologies and various control systems are used to enable to maintain highest operational performance and safety standards
- Round-the-clock service, whenever and wherever you need it
- Network of skilled professionals is ready for immediate assignment, allowing you to concentrate on the business at hand
- When required, special services are also available which can be customised to suit your needs
- When it comes to service, we are proud to set a performance standard others strive to match
- Service and performance: an unbeatable combination



## PRODUCT DESCRIPTION

- Originally concentrating on bunker fuel supply in formative years, the bunkering product portfolio has been expanded to include a wide range of residual and distillate fuel oils.
- The marine residual and distillate fuels comply with all internationally recognized standards, inter alia ISO Fuel Standard 8217 (2005).
- In line with ongoing policy of environmental awareness, slops removal and disposal for fuel oils and lubricants are offered in compliance with the regulations stipulated by the MARPOL Convention.
- Products are stored at a tank terminal with blending equipment in the ice free Muuga Harbour (within the Port of Tallinn). Thanks to the dedicated barge, we can supply all grades of high-quality marine fuel oil, diesel oil (DMB/DMA), gas oil 0,2% sulphur and lubricants.
- Our Seal Of Approval - Successful operations today rely on highly competent service providers. International bunker traders must be in a position not only to meet deadlines; they also have to be able to assure customers that they are receiving the best value for their money: dependable products and reliable service.

## SERVICE PROVIDER

**Bominflot.** Tactical management has always been a decisive factor in the shipping business. Today's successful operations rely on highly competent service providers. There is no room for compromise. When it comes to keeping business on an even keel, professionals select international specialists. Bominflot is that specialist and much more. Our business portfolio covers activities ranging from cargo trading to the supply of bunker fuels, lubricants and other services of crucial importance to the shipping industry at competitive prices. Each and every offer we make embodies our experience, know-how and reputation.



## CONTACT DETAILS

### **Bominflot Estonia**

Pärnu mnt 21, 10141 Tallinn, Estonia

**Telephone:** +372 681 1550

**Fax:** +372 681 1551

**E-mail:** [bunkers@bominflot.ee](mailto:bunkers@bominflot.ee)

**Web:** [www.bominflot.net](http://www.bominflot.net)



## A VALUE PROPOSITION

- Estonia is due to its geographically advantageous location on the eastern shore of the Baltic sea, deepwater seaports, landbridges to Russia, CIS, Central Asia, Black Sea and Far East a perfect distribution centre (DC) providing effective access to a consumer market of 300 million
- Estonian harbours are unique in Europe in the sense that there is still plenty of land available for new terminals, warehouses, manufacturing plants etc
- There are three EU Free Zones in Estonian ports offering wide range of business opportunities both for transit and manufacturing
- Hundreds of thousands of square metres of existing warehouse space for rent at the lowest cost in the region
- Hundreds of hectares of pre-developed industrial park areas for land lease in the Free Zones, ports and areas close to the ports with excellent infrastructure
- Rapid development and construction of the greenfield projects



## PRODUCT DESCRIPTION

- There are three main options available concerning industrial real estate like terminals, warehouses, distribution centres, manufacturing plans etc:
  - Renting existing warehouse space or terminal areas
  - Land lease for up to 99 years
  - Customized development and construction of new premises based on customer's specific demands
- Buying the land or existing premises is fourth considerable alternative, which is subject to negotiations with landlords.

## SERVICE PROVIDERS

- **Port of Tallinn** is the largest port at the Baltic Sea, taking into account both cargo volumes and passenger traffic. Port of Tallinn offers over 100 ha of pre-developed area (with road, rail, power, water and gas connections) for development of new terminals, distribution centres and manufacturing plants.
- **Port of Sillamäe (Silport)** is the EU's most eastern deepsea port, located only 25 km from the border between European Union and Russian Federation. Silport offers up to 600 ha for development of new terminals, distribution centres and manufacturing plants in the free zone area attached to the port.
- Both above mentioned ports are operating as landlords, have direct rail access and free zones in the harbours.
- **RRK – The State Resources Centre** is the leading Estonian developer of logistics parks and landlord. Total area of land belonging to RRK in proximity of the ports is 120 ha, total area of warehouses is 160 000 sqm. All sites and warehouses have direct rail access and good connections with highways. Warehouse space rental fees starting from as low as EUR 1,50/sqm/month.
- **Tallinn Airport** has four cargo terminals with total warehouse space of 5000 sqm. The cargo terminals are operated by several freight forwarders, courier and cargo handling companies. Total annual air cargo handling capacity of the airport is presently 100 000 tons. Readiness to develop and construct new terminals to be rented to the operators. Expansion areas for new terminals are reserved.

## CONTACT DETAILS

### Port of Tallinn Ltd.

Sadama 25, 15051 Tallinn, Estonia  
**Telephone:** +372 631 8555  
**Fax:** +372 631 8166  
**E-mail:** portoftallinn@portoftallinn.com  
**Web:** www.portoftallinn.com

### Port of Sillamäe Ltd. (Silport)

Kesk 2, 40231 Sillamäe, Estonia  
**Telephone:** +372 640 5271  
**Fax:** +372 640 5279  
**E-mail:** silport@silport.ee  
**Web:** www.silport.ee

### Harju KEK AS

Paldiski mnt 21, Harjumaa 76606, Keila  
**Telephone:** +372 674 7500  
**Fax:** +372 674 7501  
**E-mail:** h.kek@harjukek.ee  
**Web:** www.harjukek.ee

### Tallinn Airport Ltd.

Lennujaama 2, 11101 Tallinn, Estonia  
**Telephone 1:** +372 605 8700  
**Telephone 2:** +372 605 8701  
**E-mail:** administration@tl.aero  
**Web:** www.tallinn-airport.ee

### RRK - State Resources Centre Ltd.

Rävala 8, 10143 Tallinn, Estonia  
**Telephone:** +372 666 3111  
**Fax:** +372 666 3 110  
**E-mail:** rrk@rrk.ee  
**Web:** www.rrk.ee

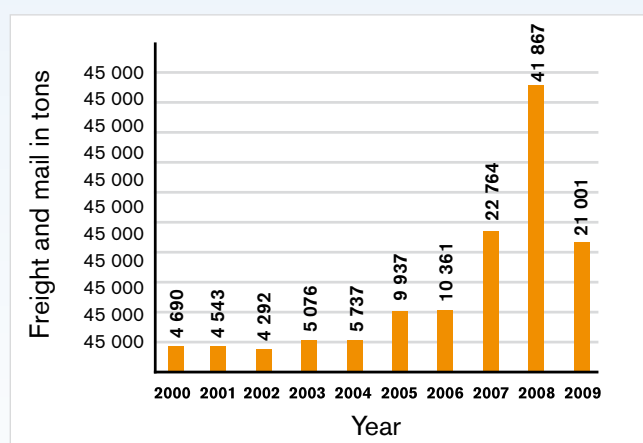
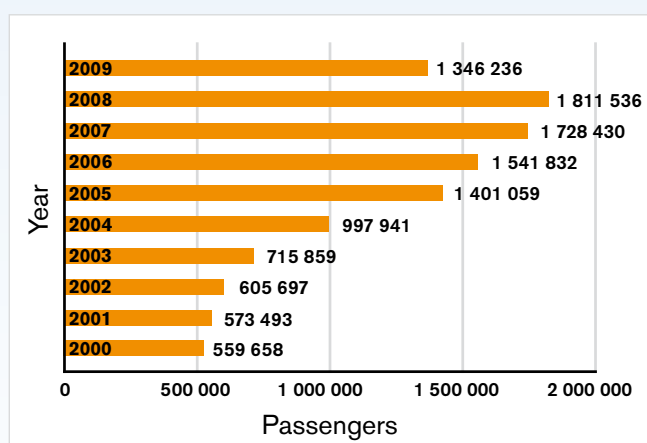
## A VALUE PROPOSITION

- Of European Union capitals, Tallinn is located nearest to Asia
- This geographical advantage gives Asian airlines an opportunity for a new, more cost-effective and competitive access to the European market
- Long-haul flights from Asia to Tallinn, connecting flights to other European destinations
- Shorter long-haul flight times and lower operating costs achieved by air-plane 24 hour turnaround with only one aircraft rotation
- Connecting flights to European destinations in cooperation with existing carriers in Tallinn, or establishing a subsidiary airline in Tallinn
- EU market access with EU Open Sky Policy permits entering every European city with no restrictions



## TALLINN AIRPORT TECHNICAL DATA

- Lennart Meri Tallinn Airport ICAO code is EETN, IATA code TLL
- Tallinn Airport has one runway that is 3070 metres long and 45 metres wide. The length of the parallel taxiway is 2550 metres
- Tallinn Airport category is 4E, navais CAT I. Fire category is 8
- The number of aircraft parking positions:
  - 4 E-class aircraft
  - 2 D-class aircraft
  - 23 C-class aircraft
  - 4 B-class aircraft
  - 12-15 A-class aircraft
- Tallinn airport has 4 cargo terminals with total warehouse space of 5000 sqm. The cargo terminals are operated by several freight forwarders, courier and cargo handling companies.
- Total annual air cargo handling capacity is presently 100 000 tons. Readiness to develop new terminals for the operators. Expansion areas for new terminals are reserved.
- Tallinn airport has one passenger terminal with 27 check-in desks, 8 self-service check-in kiosks, 4 pre-flight security control units, 12 gates of which 9 with boarding bridges, 1 business lounge, VIP centre, 3 baggage belts in the arrivals area, children play area and a prayer room
- Passenger terminal has 3 levels with all departures on the main level. Second level has a gallery for non-Schengen passenger arrivals as well as a restaurant in the public area. On the ground level there are car rental offices as well as direct access to the car park.
- For non-Schengen flights there are 4 dedicated gates, boarding lounges, tax-free shop and a snack bar
- Tallinn airport is regularly called by following airlines: Estonian Air, Air Baltic, Avies, Blue 1, City Airline, Czech Airlines, EasyJet, Finnair, FinnComm, LOT Polish Airlines, Lufthansa, Norwegian, Ryanair and several air cargo charter carriers



## CONTACT DETAILS

### Tallinn Airport

Lennujaama 2, 11101 Tallinn, Estonia

**Telephone 1:** +372 605 8700

**Telephone 2:** +372 605 8701

**E-mail:** [administration@tll.aero](mailto:administration@tll.aero)

**Web:** [www.tallinn-airport.ee](http://www.tallinn-airport.ee)



A stylized map of Central Asia and surrounding regions. The map uses a muted color palette with light blue for water bodies and various shades of grey and brown for landmasses. Country borders are indicated by thin white lines. Dotted lines represent major transportation routes. Labels for Russia, Kazakhstan, China, and Afghanistan are placed in white rounded rectangles with orange text. The cities of Ekaterinburg and Almaty are marked with orange dots and labeled in a small, dark font. The map is oriented with North at the top.

**RUSSIA**

Ekaterinburg

**KAZAKHSTAN**

Almaty

**CHINA**

**AFGANISTAN**

# Members of the Estonian Logistics Cluster

