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Information and Analytical Review

KALININGRAD TRANSPORT AND LOGISTICS HUB

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TECHNICAL POSSIBILITIES AND KEY FEATURES OF KALININGRAD TRANSPORT AND LOGISTICS HUB

Technical Possibilities and Key Features of Kaliningrad Transport and Logistics Hub

Transport and logistics features of the Kaliningrad region are due to the technical possibilities of the following key sites of the transport infrastructure of the region:

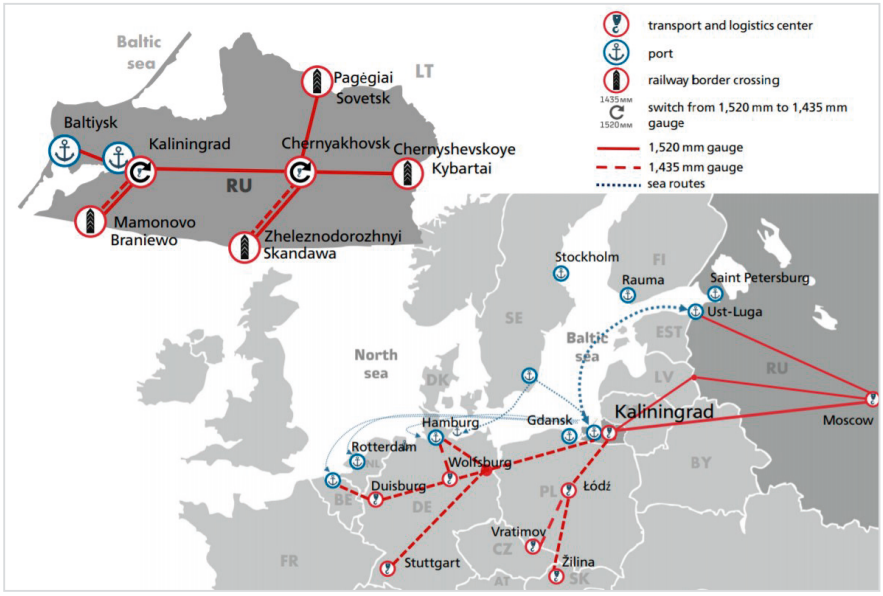
- **TLC Kaliningrad;**
- **TLC Chernyakhovsk;**
- **two checkpoints on the border with Lithuania (Kybartai – Chernyshevskoe and Pagegiai – Sovetsk);**
- **two checkpoints on the border with Poland (Mamonovo – Braniewo and Zheleznodorozhny – Skandawa);**
- **Kaliningrad warm-water port;**
- **linear infrastructure with total length in use of 963 km[1], combining railways with different gauge (1,520 mm and 1,435 mm).**

The transport and logistics infrastructure of the Kaliningrad region, together with the favorable geographical location of the region, special business conditions, customs privileges and tax preferences for residents of the Special Economic Zone, creates possibilities for the uninterrupted movement of goods and the dynamic development of international trade relations.

[1] Source: http://www.interfax-russia.ru/Moscow/main.asp?id=909199&p=14

Fig. 1.

KALININGRAD RAILWAY IN THE EUROPE TRANSPORT SYSTEM



Source: Transit Potential of the Kaliningrad Railway (presentation of the Kaliningrad Railway services)

TLC Kaliningrad

The construction of the TLC Kaliningrad began in 2017 on the basis of the Dzerzhinskaya-Novaya Kaliningrad railway station. The total investment of Russian Railways in the construction and equipment of the center exceeded 1 billion rubles[2]. On the territory of the TLC Kaliningrad, inert cargo, unitized cargo and containers are processed, cargo is stored on open areas with a total area of 32,000 km², containing a total of 1,200 TEU and 100 thousand tons of granular supplies. TLC has the following technical facilities for handling of cargo:

- two gantry cranes;
- two clam-type loaders;
- forklift loaders;
- front loaders;
- bucket loaders[3].

[2] Source: https://news.ati.su/news/2019/09/18/v-modernizaciyu-logisticheskogo-centra-kaliningrad-investirovan-milliard-rubley-200200/

[3] Source: presentation of Russian Railways "About the TLC Kaliningrad. Transport and logistics products of the Kaliningrad Railway."

The infrastructure of the TLC Kaliningrad allows processing up to 450 thousand TEU per year. The technical modernization of the TLC resulted in a more than twofold increase in the transit container traffic from the beginning of 2019. It is expected that according to the investment project implementation second stage results, the storage facilities will be able to accommodate 14 thousand containers at a time, and TLC hardware will be able to process 750 thousand containers per year[4].

It is also possible to carry out customs export-import, phytosanitary and veterinary procedures on the TLC territory. In addition, the Dzerzhinskaya-Novaya railway station is included in the Agreement on the International Freight Traffic as a station for transshipment of goods from a gauge of one width to a gauge of another width[5].

On the TLC territory, transshipment is carried out from a gauge of 1,520 mm wide to a gauge of 1,435 mm wide of wagons, containers, heavy item and granular supplies. This is the significance of TLC Kaliningrad for the development of transport infrastructure: until the TLC was formed, transshipment of goods from a gauge of one width to a gauge of another width was carried out in neighboring countries (Poland and Belarus). The Kaliningrad railway terminal was the first in the history of Russia to load cars from the Russian gauge to the European one[6]. The terminal at the Dzerzhinskaya-Novaya station was the first in the history of Russia to send coal for export to Europe via a 1,435 mm wide gauge railway[7]. The transfer of a transshipment point from Poland and Belarus to the Kaliningrad region had positive effect on the region's economy: the volume of tax deductions increased (due to Russian Railways) and the costs of shippers decreased (transshipment of goods in neighboring countries was more expensive).

An important characteristic of the TLC Kaliningrad is the possibility of piggyback transportation. In this part of the Transport Service Centre of Russian Railways work is carried out in the following areas:

- creation of the necessary terminal and warehouse infrastructure (vertical way of loading/unloading piggybacks using reach stackers or gantry cranes equipped with specialized piggyback hoisting device; the option of loading road trains can be used at Chernyakhovsk station, where there is a corresponding flyover);
- formation of the necessary rolling stock;
- creation of the necessary regulatory framework (simplified procedure for crossing the state border, approval of the "piggyback gauge", the procedure for checking the readiness of routes for the passage of piggyback trains);
- creation of flexible tariff conditions[8].

[4] Source: https://news.ati.su/news/2019/09/18/v-modernizaciyu-logisticheskogo-centra-kaliningrad-investirovan-milliard-rubley-200200/

[5] Source: http://www.esm-invest.com/en/node/142

[6] Source: https://vesti-kaliningrad.ru/v-kaliningrade-otkrylsya-transportno-logisticheskij-centr/

[7] Source: https://www.gudok.ru/sujet/maks/news.php?ID=1374213

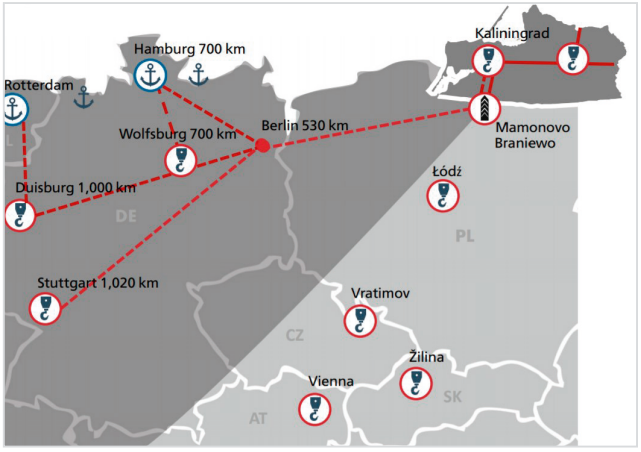
[8] Source: http://seanews.ru/2017/10/02/investicii-idut-tuda-gde-komfortno/

In 2019, a gantry crane with a multimodal spreader for processing piggyback traffic was delivered at the TLC site.

TLC Kaliningrad is served by the Russian-Polish checkpoint Mamonovo – Braniewo. Transit flows through this checkpoint are oriented towards Central and Northern Europe. Through the Mamonovo-Braniewo checkpoint, six pairs of trains along a track of 1,520 mm wide and two pairs of trains along a track of 1,435 mm pass daily[9].

Fig. 2.

TLC KALININGRAD



Source: Transit Potential of the Kaliningrad Railway (presentation of the Kaliningrad Railway services)

TLC Chernyakhovsk

The development of the TLC Chernyakhovsk is carried out on the basis of the Chernyakhovsk railway station of the Kaliningrad railway. Market participants express a high interest in the TLC development: for example, in June 2019, TransContainer PJSC signed the cooperation agreement with the Government of the Kaliningrad Region on the sidelines of the St. Petersburg International Economic Forum on the construction and development of the TLC Chernyakhovsk[10].

On the TLC territory, the processing of containers, inert and unitized cargoes is carried out, as well as the possibility of storing refrigerated containers and cargoes with a capacity of 800 TEU, 15 thousand tons of granular supplies and 4.5 thousand cars on open areas[11]. TLC has the following technical facilities for handling of cargo:

- gantry crane;

[9] Source: http://www.esm-invest.com/en/node/142

[10] Source: https://1prime.ru/transport/20190606/830049554.html

[11] Source: https://kaliningradnews.ru/ehkonomika/18122410/

- two clam-type loaders;
- forklift loaders;
- front loaders;
- bucket loaders[12].

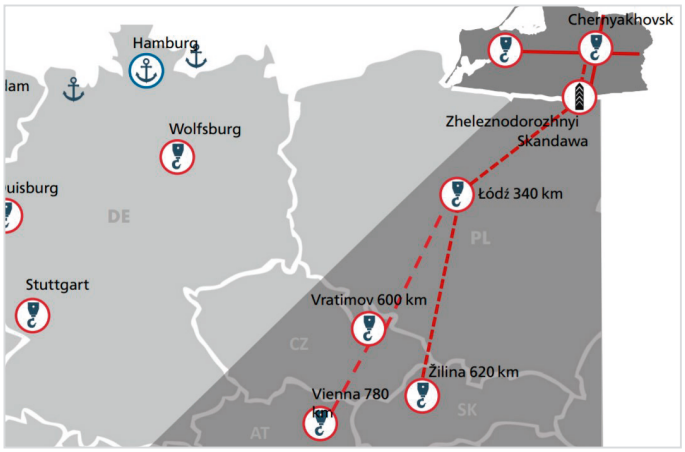
The technical equipment of the TLC Chernyakhovsk allows the processing of 300 thousand TEU, 4 million tons of granular supplies and 200 thousand vehicles per year[13]. At the same time, the processing capacity of the terminal is supposed to be increased to 500 thousand TEU[14].

It is also possible to carry out customs export-import, phytosanitary and veterinary procedures on the TLC territory. In addition, Chernyakhovsk railway station is included in the Agreement on the International Freight Traffic as a station for transshipment of goods from a gauge of one width to a gauge of another width[15].

TLC Chernyakhovsk is served by the Russian-Polish checkpoint Zheleznodorozhny – Scandawa. Transit flows through this checkpoint are oriented towards the southeastern part of Europe. Through the checkpoint Zheleznodorozhny – Scandawa, three pairs of trains on a track with a width of 1,520 mm and five pairs of trains on a track of 1,435 mm pass daily[16].

Fig. 3.

TLC CHERNYAKHOVSK



Source: Transit Potential of the Kaliningrad Railway (presentation of the Kaliningrad Railway services)

[12] Source: presentation of Russian Railways "About the TLC Kaliningrad. Transport and logistics products of the Kaliningrad Railway."

[13] Source: https://kaliningradnews.ru/ehkonomika/18122410/

[14] Source: https://1prime.ru/transport/20190606/830049554.html

[15] Source: http://www.esm-invest.com/en/node/142

[16] Source: http://www.esm-invest.com/en/node/142

Port Infrastructure

An important part of the transport and logistics infrastructure of the Kaliningrad region is the Kaliningrad warm-water port on the southeast coast of the Baltic Sea. The port has favorable geographical location: the distance to the largest European ports (Gdansk, Hamburg, Antwerp, Stockholm) is 80–900 nautical miles, travel time is from ten hours to two days[17]. In addition, the port is located at the intersection of branches of trans-European transport corridors No. 1A “Riga – Kaliningrad – Gdansk” and No. 9D “Kiev – Minsk – Vilnius – Kaliningrad".

The port of Kaliningrad provides a wide range of port services, the main of which are:

- cargo-handling operations;
- storage of goods;
- warehouse operations;
- mooring operations;
- leasing of office and warehouse premises, infrastructure facilities, etc.

Cargo-handling operations in the port are provided by a wide range of handling equipment with a load-carrying capacity of 1.5 to 50 tons:

- dockside cranes;
- hydraulic mobile articulating cranes with grabs for wood, bulk goods, scrap metal;
- forklift trucks;
- container loaders;
- marine tractors;
- bucket loaders;
- electric loaders.

Cargo storage in the Kaliningrad port is carried out at open storage areas (total area – 238 km^2), in covered storage rooms (total area – 45 km^2), refrigerated warehouses (total area – 6 km^2). The port also has a terminal for transshipment of petroleum products, capable of receiving tankers up to 163 m long).

The infrastructure of the Kaliningrad port of allows transshipment of any kind of cargo, the main of which are ferrous and non-ferrous metals, automotive equipment and cargo on roll trailers, refrigerated cargo (meat, fish), containers (including refrigerated), general, timber, bulk, grain cargoes and granular supplies[18].

[17] Source: Transit Potential of the Kaliningrad Railway (presentation of the Kaliningrad Railway services)

[18] Source: http://www.kscport.ru

The processing capacity of the Kaliningrad port is 450 thousand TEU, 40 million tons of general and oil cargo per year[19]. For the period from January to August 2019, the port container cargo turnover amounted to 32 thousand TEU of loaded containers and 20 thousand TEU of empty containers. In this case, empty containers during the indicated period were sent only for export, and loaded containers were mainly (99.5%) accepted as part of imports and to a lesser extent (0.5%) were exported[20].

From the Kaliningrad port transportations are made to the countries of Europe, Asia, America and Africa via such lines as, for example, MAERSK, MSC, MANNLINES. The Kaliningrad port infrastructure is ready to organize intermodal transportation along the East-West corridor and in the direction of the Scandinavian countries[21].

Fig. 4.

KALININGRAD PORT

Source: Kaliningrad Sea Commercial port JSC

Airport

In the Kaliningrad region there is a modern Khrabrovo airport with the fifth freedom of the air (the right to carry traffic between two foreign countries on a flight that either originated in or is destined for the carrier's home country), capable of accepting all types of aircraft and having wide geography of routes with Russian regions and European countries[22].

[19] Source: Transit Potential of the Kaliningrad Railway (presentation of the Kaliningrad Railway services)

[20] Source: calculated by ITI according to Kaliningrad Sea Commercial Port JSC (http://www.kscport.ru).

[21] Source: Transit Potential of the Kaliningrad Railway (presentation of the Kaliningrad Railway services)

[22] Source: https://www.rzd-partner.ru/logistics/interview/sukhoy-i-glubokovodnyy-porty-zastavyat-po-novomu-schitatsya-s-transportnoy-infrastrukturoy-kaliningr/

Investments and Plans for Further Development

The administration of the Kaliningrad region continues to develop the transport and logistics infrastructure of the region by creating new terminal facilities and linear infrastructure in various types of transport: rail, sea, road.

Land port

The authorities of the Kaliningrad region, together with private investors, the Kaliningrad Railway and with the support of VEB are implementing a Land Port Project in Chernyakhovsk in the industrial park territory. The essence of this project is to create a large transport and logistics center (about 300 hectares), which would become part of the New Silk Road, ensure the distribution and transshipment of goods between China and the European Union (EU). The planned discharge capabilities of the "land port" are 200 thousand TEU per year; technical equipment of the "land port" includes:

- container site for 18 thousand containers, container terminal;
- temporary storage of 1,520 mm gauge with square of 5 km^2 with four climate control chambers with square of 700 m^2;
- terminal for oversize goods;
- terminal for explosive and dangerous goods;
- cargo area with temperature requirements with 180 power supply points;
- line of sanitary and veterinary control;
- rail access roads (gauge width 1,520 mm and 1,435 mm)[23].

The total investment is about 15.7 billion rubles, the launch of the project is scheduled for 2021.[24]

[23] Source: https://www.rzd-partner.ru/logistics/interview/sukhoy-i-glubokovodnyy-porty-zastavyat-po-novomu-schitatsya-s-transportnoy-infrastrukturoy-kaliningr/

[24] Source: https://tass.ru/ekonomika/5987548

Seaports and communications

For the development of maritime transport, the construction of the following sites is planned:

1. **Deep-sea port near the Yantarny village**

   Implementation of the project is planned as part of the instruction of the President of the Russian Federation to ensure the transshipment of goods in Russian ports rather then in neighboring countries. The structure of the port is planned to include a container terminal, terminals for bulk, rolling and general cargo[25].

2. **Passenger-and-freight port in Pionersky**

   The total cargo area of the port will be 75.5 km^2. The completion of the construction was planned for the autumn of 2019, but due to adverse weather events in January 2019, it is delayed by 9 months[26].

3. **Two new railway ferries between Ust-Luga and Baltiysk**

   In 2020–2021 it is planned to complete two new railway ferries – ships about 200 meters in length and not more than 27.4 meters in width. These vessels will accommodate at least 80 railway tanks, 54 open wagons and 36 freight wagons, as well as 56 vehicles with trailers (without trains)[27].

Road development in the region

1. **Northern Bypass Road construction**

   The Northern Bypass Road is the northern part of the Kaliningrad circular road. The completion of the first phase of the project is expected in 2019.[28]

2. **Construction of a bridge across the Kaliningrad Gulf**

   The bridge will connect the villages of Kosmodemyansky and Shosseiny. The length of the road infrastructure (bridge over the Pregol river, overpasses and interchanges) will be about 8 km. 5 years are allocated for design and construction[29].

3. **Construction of the Primorsky ring route (to Baltiysk)[30].**

[25] Source: https://www.rzd-partner.ru/logistics/interview/sukhoy-i-glubokovodnyy-porty-zastavyat-po-novomu-schitatsya-s-transportnoy-infrastrukturoy-kaliningr/

[26] Source: https://tass.ru/ekonomika/6798494

[27] Source: https://kgd.ru/news/society/item/80928-parom-dlya-linii-baltijsk--ust-luga-dolzhny-sdat-v-jekspluataciyu-k-2021-godu

[28] Source: https://regnum.ru/news/2701052.html

[29] Source: https://klg.aif.ru/society/details/podpisano_soglashenie_o_stroitelstve_mosta_cherez_kaliningradskiy_zaliv

[30] Source: https://kgd.ru/news/transport/item/81377-vlasti-obyavili-torgi-na-proektirovanie-dvuh-ocheredej-primorskogo-kolca

Conclusion

The Kaliningrad region has developed transport and logistics network unifying all types of transport. This is an important factor shaping the logistics potential of the region in the context of the development of a new trans-Eurasian land transit and multimodal transportation. The regional authorities are working to develop the existing infrastructure and create a new one, which indicates a high interest of the region in the implementation of its transport and logistics potential.

ROLE OF KALININGRAD TRANSPORT AND LOGISTICS HUB IN DEVELOPMENT OF CONTAINER RAIL AND MULTIMODAL TRANSPORTATION BETWEEN EUROPE AND CHINA

Role of Kaliningrad Transport and Logistics Hub in Development of Container Rail and Multimodal Transportation Between Europe and China

Feature of the transport and logistics complex of the Kaliningrad region is not only the developed infrastructure of all types of transport, but also the connexity of this infrastructure. This highly contributes to the effective integration of the Kaliningrad region into the system of land and multimodal transport corridors connecting Europe and Asia, primarily in the fast-growing container transportation sector.

Potential of Kaliningrad Region in Development of Container Rail Transportation Along Europe-China Corridor

Container rail transportation in EU – China by transit through the Kaliningrad region territory began relatively recently: in September 2017, the company United Transport and Logistics Company – Eurasian Railway Alliance (UTLC ERA) carried out a pilot shipment of a container train from Kaliningrad to China through the station Dostyk (Kazakhstan)[31].

The integration of the Kaliningrad railway infrastructure into the West-East transport corridor system was facilitated by two key features of the region's railway infrastructure: reduced delivery times for goods (compared with sea transportation) and the presence of two types of gauge (1,435 mm and 1,520 mm wide) with the possibility of quick reloading of trains without rearrangement of wheel pairs.

[31] Source: https://www.utlc.com/news/otlk-era-delaet-stavku-na-multimodalnye-perevozki/

First, it should be noted that modern logistics is characterized by tendency to acceleration rail transportation and slowing sea transportation. For example, if in 2007 the term for transporting goods from the Baltic countries to China by rail reached 36-37 days, then by 2017 it had decreased to 14 days. At the same time, the transportation of goods by sea over the past 11 years increased by an average of 10 days[32]. Speed is the main advantage of rail transport in the fight against the sea one for flow of cargo.

Currently, the delivery of goods by rail from Kaliningrad to major cities in China takes an average of only 12 days, while sea transport takes up to 60 days to overcome a similar route. But the indicated period is not the limit: market participants are actively working towards a further reduction in the delivery time of goods and, as a result, a further increase in the attractiveness of rail transport. So, in March 2019, UTLC ERA organized transportation of consumer goods on the route Chongqing – Kaliningrad for one of the Kaliningrad enterprises; transit time was only 8 days[33]. Manufacturing enterprises of the Kaliningrad region can be integrated into container traffic along the route Kaliningrad – Chongqing – Kaliningrad and receive a discount on the tariff of Russian Railways up to 70% in case of a take-or-pay agreement. By the end of 2019, the Kaliningrad Railway plans to increase the volume of transportation of goods from China for the needs of enterprises of the Kaliningrad Region to 100 containers per month[34].

In addition to high speed, the use of railway transport in trans-Eurasian transportation guarantees lesser impact of adverse weather conditions on the transported goods, a greater level of transport safety and decrease in the negative impact on the environment. Moreover, taking into account the existing subsidy programs, the tariff rate for FEU for container rail transportation is comparable to the tariff rate for sea container transportation.

The railway infrastructure of the Kaliningrad transport and logistics hub is optimal alternative not only to sea transportation, but also to container railway transportation through the checkpoint Brest (Belarus) – Malaszewicze (Poland).

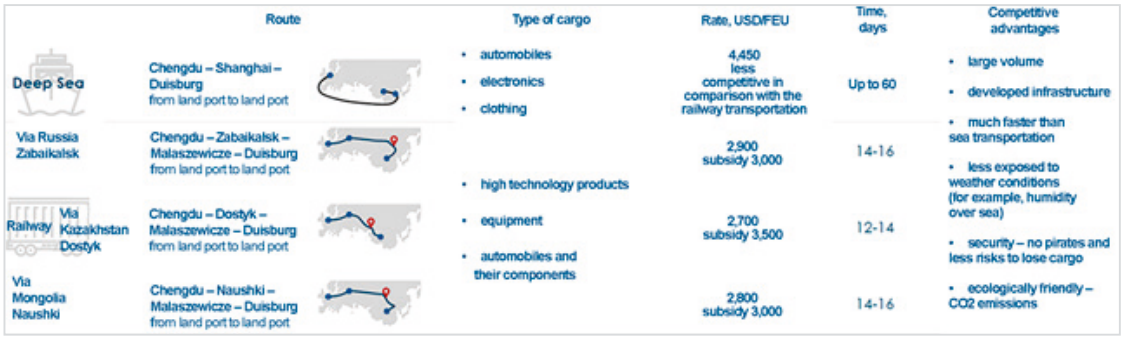
[32] Source: https://baltnews.lt/authors/20180913/1018360049.html

[33] Source: http://seanews.ru/2019/03/22/en-iz-kitaja-v-kaliningrad-za-8-sutok/

[34] Source: https://www.rzd-partner.ru/logistics/interview/sukhoy-i-glubokovodnyy-porty-zastavyat-po-novomu-schitatsya-s-transportnoy-infrastrukturoy-kaliningr/

Fig. 5.

ADVANTAGES OF RAILWAY TRANSPORT OVER SEA (USING THE EXAMPLE OF TRANSPORTATION ALONG THE CHENGDU – DUISBURG ROUTE)



Source: TransContainer PJSC

First, the TLC Kaliningrad and the TLC Chernyakhovsk together are able to process more than 800 thousand TEU per year, while the throughput of the Brest – Malashevich checkpoint is 500 thousand TEU per year[35]. The infrastructure of this point is loaded, and the checkpoints and TLCs of the Kaliningrad Region have free capacities and are successfully implementing plans for further development. In addition, the transit time for the Kaliningrad Region by rail is a little over 12 hours, it takes about two and a half hours to cross the Russian-Polish and Russian-Lithuanian borders (for comparison: three years ago, border crossing by freight trains took up to 15 hours)[36], while at the checkpoint Brest – Malaszewicze long downtimes are possible due to the high level of congestion of infrastructure. So, in 2017 there was a case of downtime of a freight train at the border for seven days. At least eight trains a day pass through Brest, and each new train increases the risk of downtime[37]. To mitigate this risk, new checkpoints have been opened on the Belarusian-Polish border checkpoint (Bruzgi – Kuznica Bialostocka and Svisloch – Siemianowka), which also process cargoes, but their carrying capacity is not enough to break up the "bottleneck" on the Belarusian-Polish border: in 2018, only two container trains per week passed through Bruzgi station[38].

Improving the technology and reducing time costs is characteristic for the development of all aspects of the functioning of the Kaliningrad transport and logistics hub. In particular, in 2019, a second gantry crane was installed in the TLC Kaliningrad, and if previously it took 4–4.5 hours to reload a container train from a track of 1,520 mm to a track of 1,435 mm (and in the opposite direction), now performing similar procedures will take half the time[39].

[35] Source: https://baltnews.lt/authors/20180913/1018360049.html

[36] Source: https://rg.ru/2018/09/30/reg-szfo/kontejnernye-poezda-v-evropu-pomeniali-marshrut-s-bresta-na-kaliningrad.html

[37] Source: https://baltnews.lt/authors/20180913/1018360049.html

[38] Source: https://www.rzd-partner.ru/zhd-transport/news/belorussko-polskie-zheleznodorozhnye-pogranperekhody-zagruzheny-napolovinu/

[39] Source: https://www.gudok.ru/freighttrans/?ID=1477592

The advantage of the Kaliningrad transport and logistics hub over the checkpoint Brest (Belarus) – Malaszewicze (Poland) also lies in the shorter "transport leg", which allows shippers to save up to 30% of costs[40]. In addition, since 2005, subsidy programs have been in place for railway transit to Kaliningrad: only in 2016–2017, about 1 billion rubles were allocated from the state budget for these purposes[41]. It is also important that the Baltic countries are currently pursuing a tariff policy favorable for railway transit: so far, Russian Railways has managed to agree with the Baltic states significant discounts on the transit of goods through their territory[42]; for UTLC ERA favorable rates were set[43].

It should be noted that even if the political situation aggravates in relations with the Baltic countries or if the Baltic countries pursue an unfavorable tariff policy in the railway transit sector, the Kaliningrad Region will not be cut off from Russian transport routes: for this, two railway ferries are being built and will soon be commissioned between the ports of Baltiysk in the Kaliningrad region and Ust-Luga in the Leningrad region. The use of railway ferries is expected to significantly reduce the cost of cargo delivery[44].

The high development efficiency of the Kaliningrad transport and logistics hub and the significance of its potential are illustrated by the positive dynamics of container rail transportation across the territory of the Kaliningrad region. So, according to the results of 2018, in general, in all directions, the volume of container transit railway traffic through Kaliningrad amounted to 150 thousand TEU, according to the results of the period from January to May 2019 – 54.4 thousand TEU (which is 5.1% higher level of the same period of 2018), and by the end of 2019, the Kaliningrad Railways with the participation of European and Chinese partners plan to reach the figure of 220 thousand TEU[45]. The implementation of planned and already begun infrastructure projects, as well as active work to increase the attractiveness of the Kaliningrad transport and logistics hub, allows us to expect that by 2024 the volume of transit container rail transport through Kaliningrad will reach 1.2 million TEU[46].

Achieving the target volume of transit traffic of 1.2 million TEU is possible taking into account the development on the basis of the Kaliningrad transport and logistics hub not only rail, but also multimodal transportation using rail.

[40] Source: https://www.newkaliningrad.ru/news/briefs/economy/19635822-gruzooborot-na-kaliningradskoy-zheleznoy-doroge-pokazal-ochen-sereznyy-prirost.html

[41] Source: https://russian.rt.com/russia/article/425934-kaliningrad-pribaltika-tranzit

[42] Source: https://russian.rt.com/russia/article/425934-kaliningrad-pribaltika-tranzit

[43] Source: https://www.gudok.ru/freighttrans/?ID=1461191

[44] Source: https://kaskad.tv/novosti/8138-v-kaliningrade-evakuirovali-24-shkolu

[45] Source: https://www.gudok.ru/news/?ID=1468992

[46] Source: https://www.gudok.ru/newspaper/?ID=1475853&archive=2019.09.04

Potential of Kaliningrad Region in Development of Multimodal Transportation

The high potential of the Kaliningrad transport and logistics hub for the development of multimodal container transportation in the direction of China – Europe – China is due to the presence in the region of developed infrastructure network for all modes of transport and efficient communication mechanisms for the infrastructure of all modes of transport.

The Kaliningrad Railway is the only Russian railway to have direct exits to Central Europe. The Kaliningrad Railway is part of the branches of two trans-European transport corridors: Riga – Kaliningrad – Gdansk (provides access to the Baltic countries, Poland, Germany, Finland) and Kiev – Minsk – Vilnius – Kaliningrad (connects the central and eastern regions of Russia with port terminals of the Kaliningrad region). The railway infrastructure of the Kaliningrad region is connected with warm-water Baltic ports, which, in turn, have a well-developed access infrastructure that ensures the timely transportation of any kind of cargo. The Kaliningrad seaport also has a unique geographical position, which allows delivering goods to the largest seaports in Europe as soon as possible: to Tilburg in 16 hours, to Rostock in 20 hours, to Hamburg in 35 hours[47].

Fig. 6.

ADVANTAGES OF THE GEOGRAPHICAL LOCATION OF THE KALININGRAD SEAPORT

Source: Kaliningrad Sea Commercial port JSC

[47] Source: data of Kaliningrad Sea Commercial port JSC

The Kaliningrad region port infrastructure provides the possibility of multimodal transportation along the East – West corridor and in the direction of the Scandinavian countries. The use of multimodal route through Kaliningrad for the transport of goods from Europe to Asia reduces the overall delivery time due to, inter alia, the exclusion of long parking at the borders. It takes only an hour and a half to transfer a container train in the port of Kaliningrad from wagon to ship[48]. The loading/unloading speed guaranteed by Kaliningrad Sea Commercial port JSC is 35 containers per hour (in 2018, even an indicator of 40 containers per hour was achieved)[49].

In 2018, Russian Railways implemented a multimodal project to organize the transportation of goods as part of a container train from the port of Nakhodka to Kaliningrad. The train covered 10,500 km in 11 days, while the delivery time of goods in containers by sea between similar points exceeds 60 days[50].

Fig. 7.

ADVANTAGES OF THE MULTIMODAL ROUTE OVER THE SEA ONE (USING THE EXAMPLE OF TRANSPORTATION ALONG THE CHENGDU – DUISBURG ROUTE)

	Route		Type of cargo	Time, days	Competitive advantages
Deep Sea	Chengdu – Shanghai – Duisburg from land port to land port		• automobiles • electronics • clothing	Up to 60	• large volume • developed \ infrastructure
via Vladivostok Intermodal	Center of China – Shanghai – Vladivostok – Duisburg from land port to land port		• n/s	22-26	• n/s
via Dostyk – Baltic sea ports	Center of China – Dostyk – Saint Petersburg – Duisburg from land port to land port		• n/s	18-22	• much faster than sea transportation

Source: TransContainer PJSC

High efficiency of multimodal container transportation through Kaliningrad is also due to the active work of market participants in improving workflow: to date, Kaliningrad Sea Trade Port has introduced an electronic document exchange system between sea freight forwarders, customs authorities, the port operator and the Kaliningrad Railway that reduces the time spent on preparation of a transport documents and their exchange to a minimum[51].

[48] Source: https://gov39.ru/news/101/140881/

[49] Source: data of Kaliningrad Sea Commercial port JSC

[50] Source: https://gov39.ru/news/101/140881/

[51] Source: data of Kaliningrad Sea Commercial port JSC

Participants in the logistics market are already actively using the advantages of the Kaliningrad transport and logistics hub in the context of the development of multimodal container transportation. In particular, in February 2018 in Vienna (Austria), memoranda of strategic cooperation were signed between UTLC ERA, Kaliningrad Railway, Kaliningrad Sea Commercial port JSC, Baltic Stevedoring Company LLC and FSUE Rosmorport[52]. In particular, the memorandum signed by UTLC ERA and the Kaliningrad Railway provides for cooperation in organizing multimodal container transportation in the China-Europe connection with the participation of 1,520 mm railway track gauge services from Dostyk / Altynkol stations through the Kaliningrad or Baltiysk ports for further transfer to sea transport and delivery to the ports of Northern Europe. As a follow-up to this, in November 2018, two pilot trains with containers arrived by sea from the ports of Holland and Germany were sent from the port of Kaliningrad via Dostyk (Kazakhstan) to Chengdu (China). For rail transportation, full trains (XL trains) were used[53].

Conclusion

The Kaliningrad region has a developed transport and logistics infrastructure that provides the region with significant potential in the field of transit railway and multimodal transportation. The potential for handling containerized cargo in Kaliningrad is 450 thousand TEU per year, and the volume of actually processed containerized cargo in 2018 amounted to 150 thousand TEU.

Availability of a railway track gauge of 1,520 and 1,435 mm, continuous improvement of technologies and services, as well as a low load of terminal capacities, can significantly reduce the time for railway transport of goods in the Europe – Asia direction. The connection of the railway infrastructure with the warm-water port in the Baltic Sea, located in the vicinity of the largest seaports of Northern Europe, opens wide possibilities for using multimodal transportation for transporting goods in any direction.

However, the potential of the Kaliningrad transport and logistics hub can be used not only to organize transit rail and multimodal transportation, but also to realize the export potential of the region, as well as to accumulate cargo from all over Europe.

[52] Source: data of Kaliningrad Sea Commercial port JSC

[53] Source: https://www.utlc.com/news/pilotnye-poezda-cherez-porty-kaliningradskoy-oblasti/

ENSURING LOADING OF TRAINS TRAVELING FROM EUROPE TO CHINA: OPPORTUNITIES OF KALININGRAD REGION

Ensuring Loading of Trains Traveling from Europe to China: Opportunities of Kaliningrad Region

The volume of trans-Eurasian container rail transportation is actively growing at present: if in 2015 the volume of container rail transportation between the EU and China amounted to 40 thousand TEUs, then by the end of 2018 this figure reached 280 thousand TEUs (i.e., increased 7 times). At the same time, a significant geographical imbalance remains in the transportation structure. So, according to the results of 2018, container traffic in the China-EU direction accounted for 60% of the total flow of container cargo, and 40% for the flow of cargo in the EU-China direction[54]. In the seven months of 2019, 400 empty containers were sent from Kaliningrad to China[55]. In addition, in 2018, 23% of all containers traveling in the direction of China – Europe – China in transit by Russian railways were empty. This is 60 thousand TEUs, about 50% of which proceeded in the EU – China direction[56]. In connection with the Russia's acceptance of the law on the application of the zero rated VAT for transit of empty containers and wagons,[57] their transportation will become less costly, which is not an incentive to increase the level of loading of trains coming from the EU to China.

At the same time, the European cargo base, including one being formed in the Kaliningrad region, has significant potential that can be used to load empty containers sent from Europe.

[54] Source: calculated by ITI according to TransContainer PJSC.

[55] Source: https://rugrad.eu/interview/1135011/

[56] Source: https://www.gudok.ru/freighttrans/?ID=1476918

[57] Source: https://ria.ru/20190919/1558849366.html

Export Potential of Kaliningrad Region and Import Demand of China

Export of the Kaliningrad region to China is currently characterized by uneven flows of goods. According to representatives of the Kaliningrad Railway, it is difficult to single out goods with a relatively regular flow of cargo in the structure of export shipments[58].

The volume of exports of the Kaliningrad region to China in 2018 amounted to USD 127.6 million (2% more than in 2017), while the share of the Kaliningrad region in Russia's total exports to China remains extremely low – at 0.2%. The commodity structure of the region's exports to China is formed by an extremely small number of commodity items – only 32 in 2018, the largest of which is unrefined or refined oil (almost 70% in 2018), and the export volume of this product is growing. The specific gravity of minerals and rapeseed oil (12% each) is also of great significance.

Despite the high level of concentration, the commodity structure of exports of the Kaliningrad region to China contains products from a wide range of industries: chemical (distillates), metallurgy (copper and zinc alloys), forestry and woodworking (timber, paper), fish (tuna, sardines), etc. This indicates that the Kaliningrad Region has the potential to diversify exports to China.

At the same time, the Chinese market – the largest consumer market in the world – opens great opportunities for Kaliningrad exporters. The expansion of trade relations with China can help in solving problems of non-resource exports, including agricultural goods. For example, the railway route from Kaliningrad to Chongqing (the starting point in Europe is Duisburg) is already operating, the delivery of goods via this route will take only 11-12 days (for comparison: it takes 55 days to deliver goods by sea)[59], and Chongqing, in turn, is a city with 40 million inhabitants, which is comparable to the population of Poland. However, the route may not end in Chongqing: further delivery of goods to other provinces of China is possible. In particular, the delivery of container cargo from Chongqing to Shanghai and Guangzhou takes three to four days[60].

[58] Source: https://rugrad.eu/interview/1135011/

[59] Source: https://rugrad.eu/projects/nosilkyway/

[60] Source: https://rugrad.eu/projects/nosilkyway/

Table 1.

EXPORT FROM KALININGRAD REGION TO CHINA

Item	THE VOLUME OF EXPORTS FROM THE KALININGRAD REGION TO CHINA, USD MILLION			Share of goods in total exports (2018), %
	2016	2017	2018	
Unrefined or refined oil	37.5	67.5	88.4	69.3%
Minerals	—	41.0	15.8	12.4%
Rapeseed oil	—	1.7	15.4	12.0%
Flax seeds	—	1.4	2.9	2.3%
Distillates	0.3	1.0	2.3	1.8%
Copper and Zinc Alloys	—	—	0.8	0.6%
Birch Timber	—	0.02	0.7	0.6%
Other goods	13.8	2.9	1.4	1.1%

Source: calculated by ITI according to the Federal Customs Service (FCS)

The structure of exports of the Kaliningrad region to third countries indicates that expanding the region's trade relations with China can be achieved by increasing the export of agricultural products and introducing new types of products to the Chinese market, including high-tech goods that are already exported from the Kaliningrad region to foreign markets.

Total exports of the Kaliningrad region to other countries except China in 2018 was 15 times higher than the region's exports to China. The basis of the commodity structure of exports of the Kaliningrad region to other countries is agricultural products and marine vessels, the share of some types of chemical products is also significant. At the same time, a comparison of the average export supply volumes of the Kaliningrad region with the average import demand of China shows that the Kaliningrad region is able to fully cover Chinese demand or its significant share for certain commodity items. So, the average export volume of oil cake and soybean oil solid waste by the Kaliningrad region is 8 times higher than the average import volume of this product to China, carpentry – 2 times, beet bagasse and sugarcane bagasse – by 29%; the region is also able to cover 75% of China's demand for grape pomace.

Table 2.

COMMODITY STRUCTURE OF EXPORTS OF KALININGRAD REGION TO THIRD COUNTRIES (EXCLUDING CHINA) AND CHINA'S IMPORTS OF SIMILAR GOODS

Item	The average export volume of the Kaliningrad region to third countries (except China), 2016–2018, USD million	CHINA IMPORT	
		Average volume, 2016–2018, USD million	Major suppliers
Soybean cake	167.7	21.1	Denmark, USA, Republic of Korea
Wheat and meslin	149.5	344.9	Australia, Kazakhstan
Freight and passenger-and-freight ships	85.1	597.4	Japan, Republic of Korea
Polyethylene terephthalate	50.9	346.6	Republic of Korea, Taipei, Japan
Rapeseed cake	34.2	287.0	Canada, Russia, Mongolia
Ferrous scrap	33.4	908.9	Japan
Rapeseed	31.5	1,960.2	Canada
Barley	23.2	1,549.5	Australia, Canada
Joinery and carpentry	15.8	7.9	USA, Italy, Japan, Austria
Tugboats and pusher ships	14.8	15.2	Japan, Norway
Corn	14.7	672.2	Ukraine
Grape pomace	12.8	17.0	Brazil, Argentina
Dried peas	11.6	468.8	Canada, France
Beet bagasse, sugarcane bagasse	11.3	8.8	USA, Ukraine
Jet engines other than turbojet	8.1	0.3	USA, France
Automobile mechanics	7.2	10.5	Germany
Other goods	591.3		

Source: calculated by ITI according to the Federal Customs Service and the International Trade Center (ITC)

At the same time, the commodity structure of exports of the Kaliningrad region to countries other than China favors the use of container rail transport for organizing transportation in foreign trade. Among the goods exported by the Kaliningrad Region, for the transportation of which container rail transport can be used, there are products from a wide range of industries: from food and consumer goods industry to the production of household appliances. It is noteworthy that a significant part of such commodity items are currently delivered to China from countries located in the European part of the continent, including those that are not landlocked, which means that they are most likely to use land for export shipments transport. This means that the Kaliningrad region, located in the European part of the continent and having a developed transport and logistics infrastructure, can also export these goods to China.

It should be noted that the cost of transporting one container with cargo by rail from Kaliningrad to China is lower than this transporting in the opposite direction: on average, shipping goods from Kaliningrad to Chongqing costs USD 2.3 thousand, in the opposite direction – USD 3.4 thousand. This tariff covers the provision of a container throughout the use area, loading a train at the Dzerzhinskoye terminal, reloading in Dostyk, unloading in Chongqing, paying all transit fees and additional fees along the route[61].

Another factor ensuring the loading of trains in the direction of Europe – China is the possibility of sending consolidated cargoes from Kaliningrad (for 3-4 recipients) in one container[62].

The development of exports of the Kaliningrad region to China is also important to achieve the goal set by the President of Russia to increase the volume of non-resource exports to 250 USD billion by 2024 and agricultural products up to 45 USD billion. It means that by 2024 the annual export volume of agricultural products from the Kaliningrad region should be 2.2 USD billion. For comparison: at the end of 2018, the volume of agricultural exports from the region amounted to 1.3 USD billion, and 90% of this volume is formed by the group of companies Sodruzhestvo-Soya, specializing in the production of vegetable oils. Vegetable oils are also a major export article to China, with the supply of soy and rapeseed oils to China so far reaching 150 containers per month. However, Chinese consumers are also interested in the supply of other types of products such as bottled water, alcoholic beverages, honey, chocolate, cookies. In general, food products manufactured in Europe are in demand in China, as far as they are considered more environmentally friendly[63].

[61] Source: https://rugrad.eu/interview/1135011/

[62] Source: https://rugrad.eu/interview/1135011/

[63] Source: https://rugrad.eu/projects/nosilkyway/

The European company RTSB has experience in transporting wine and meat to China, and notes that Chinese consumers have a demand for dairy products (including milk powder, whey) and baby food[64].

Table 3.

EXPORT FROM KALININGRAD REGION OF GOODS FOR TRANSPORTATION OF WHICH THE CONTAINER RAIL TRANSPORT CAN BE USED AND IMPORT OF SIMILAR GOODS TO CHINA

Item	EXPORT OF MAIN COMMODITY ITEMS TO THIRD COUNTRIES		IMPORT OF GOODS FROM THIRD COUNTRIES TO CHINA
	Average value, 2016–2018, USD million	Average value, 2016–2018, USD million	Major suppliers
Oilcake from vegetable fats or oils	205.0	308.2	Canada, Australia, **Denmark,** USA, Republic of Korea
Polyethylene terephthalate	33.9	520.0	Republic of Korea, Taipei, Malaysia, Japan, USA
Scrap and products from ferrous metals, rolled products	35.5	650.4	Japan, Republic of Korea, **Germany,** USA
Rapeseed	31.5	1 960.2	Canada, Russia
Dried peas and corn	26.3	1 141.0	Canada, **Ukraine**
Animal or vegetable fats and oils	18.9	3,658.9	Indonesia, Malaysia, Australia
Joinery and carpentry	15.8	7.9	UAE, **Italy,** Japan
Monitors, panels, consoles, cables, etc.	7.6	5,058.7	**Germany,** Japan, USA
Frozen fish fillet	11.2	662.8	Russia, USA, **Norway,** Japan
Decorative non-knitted goods	8.3	170.9	Taipei, Japan, USA, **Republic of Moldova,** Turkey
Eel	3.0	0.8	Taipei
Leather products, mink fur raw materials	5.0	656.3	**Denmark,** Canada, **France,** Republic of Korea, **Italy**
Peat	5.5	43.8	**Latvia, Lithuania**
Flash equipment	2.9	15.5	Thailand, **Sweden**
Deep freezers	1.7	3.5	USA

[64] Source: RTSB data.

Whizzed cheeses and whey	0.3	651.1	USA, **France,** New Zealand, **Netherlands**
Lecithins	1.7	44.6	**Germany, Sweden,** USA, Japan
Cattle products and canned cattle	2.0	9.7	Mongolia
Wooden furniture	1.0	202.5	**Italy,** Vietnam, **Poland**
Bread and bakery	0.7	318.4	Hong Kong, Taipei, Malaysia
Paper	0.9	39.0	Taipei, Indonesia, Japan, USA
Sweaters, pullovers, jumpers, vests	0.4	248.0	Vietnam, Indonesia, Bangladesh
Wheelchairs for people	0.1	3.0	USA, **Germany, Italy, Sweden,** Japan
Polyester paints and varnishes	0.2	116.8	Republic of Korea, Japan, Malaysia, **Germany**
Bearings	1.5	1,459.7	Japan, Thailand, **Germany,** Republic of Korea, **Italy, Austria**

Source: calculated by ITI according to the FCS and ITC

Support for Exporters of Kaliningrad Region

The need to ensure the loading of container trains from Kaliningrad to China is recognized not only by market participants, but also by the administration of the Kaliningrad region, including in the context of the need to fulfill the task set by the President of Russia to double the volume of non-resource exports of Russia. in view of this, in the Kaliningrad region a wide range of measures are being taken to support and stimulate exports.

Active work in this direction is carried out by the regional Export Support Center, offering potential and existing exporters the following services:

- assistance in the preparation and translation of presentation materials and websites into foreign languages (free of charge for companies only planning to export);
- search of a partner (the most popular service);
- assistance in certification, standardization and protection of a trademark;

- placement on international electronic trading platforms such as Alibaba (5 companies have already entered);
- examination of export contract support by international lawyers;
- organization of business missions and international exhibitions;
- assistance in the preparation of roadmaps.

In 2018, 465 small and medium-sized enterprises received support from the Center[65].

The financial support of Kaliningrad exporters is provided by the Rosselkhozbank represented by the Center of Competencies for servicing foreign economic activity. The institute mainly offers products in the area of documentary business or trade finance, various import letters of credit, guarantees, post-financing; assistance is also provided for structuring a foreign trade contract. The Rosselkhozbank carries out operations in 14 currencies, including Chinese. As part of currency control, entrepreneurs can use free services such as contract review, advice on currency control, monitoring the execution of expected dates, and preventing violations[66].

It is also important to note that when exporting agricultural products, the state subsidizes transportation only on railway routes. In particular, the state compensates 50% of the costs when delivering agricultural products from Kaliningrad to Chongqing. When exporting high-tech goods, 80% of the cost of transportation is subsidized. Since 2019, the regional unit of the Russian Export Center has been acting as the agent for the provision of such subsidies[67].

Financial support for the region's exporters is also provided by the Kaliningrad Region Business Support Centre: in 2019, for the purposes of increasing exports, the center received 59 million rubles from the federal budget, which significantly exceeds the amount of funds received for similar purposes in 2018 (10 million rubles)[68].

However, despite the measures taken by the Kaliningrad Oblast administration and other institutes to support exports, enterprises encounter certain difficulties in entering the Chinese market. For example, the Kaliningrad dairy producer Zalessky Fermer, already having official access to the Chinese market, cannot supply its products there due to the requirements of Chinese law, according to which the shelf life of dairy products should be one year, while the shelf life of the Zalessky Fermer production is half a year[69].

[65] Source: https://rugrad.eu/interview/1135011/

[66] Source: https://rugrad.eu/interview/1135011/

[67] Source: https://rugrad.eu/projects/nosilkyway/

[68] Source: https://rugrad.eu/projects/nosilkyway/

[69] Source: https://rugrad.eu/projects/nosilkyway/

At the same time, there are positive examples of Kaliningrad exporters entering the Chinese market. Among them is the Kaliningrad producer of peat for seedlings and fertilizers. To carry out export deliveries, the trading company was created in China, which will receive an import subsidy (China subsidizes not only export supply, but also imports of goods highly popular on the domestic market)[70]. Transportation of cars from Europe to China through Kaliningrad and Dostyk by rail was also arranged[71].

However, the Kaliningrad Region, taking into account the available terminal and storage capacities of the logistics infrastructure, can act not only as a point of origin for goods going to China, but also as a point of accumulation of such goods from all over Europe.

Kaliningrad Region – Promising Point of Collection of Goods from EU Countries

The presence in the Kaliningrad region of a 1,520 mm and 1,435 mm railway gauge creates possibilities for delivering goods produced in European countries to the region with a 1,435 mm gauge for the purpose of accumulation and their subsequent delivery to China. Moreover, the delivery of goods from European countries to the terminal infrastructure of the Kaliningrad region is also possible by other means of transport.

A positive example in this context is the company UTLC ERA, which signed in June 2019 with a logistics terminal Consorzio ZAI Interporto Quadrante Europa located in Verona (Italy), a memorandum of understanding, according to which the parties intend to jointly develop multimodal container transportation between China and Europe: cargo will be delivered from the terminal in Verona (Italy) to the port of Rostock (Germany), from where they will go by sea to Kaliningrad and then continue to China along the route of 1,520 mm wide gauge operated by UTLC ERA[72]. Similar routes can be worked out with other European countries, which act as major consignors to China.

[70] Source: https://rugrad.eu/interview/1135011/ and RTSB data.

[71] Source: https://www.gudok.ru/first_person/?ID=1465148

[72] Source: http://seanews.ru/2019/06/07/en-otlk-era-zapustit-servis-iz-italii-v-kitaj/

Factor in the accumulation of European goods intended for export to China in the Kaliningrad region may also be the permission published in July 2019 for the transit of food products produced in the EU through Russia. Due to imposing an embargo by Russia on the import of certain categories of food products by Russia, the flow of cargo from the EU to China in the amount of up to 2 USD billion was reoriented to alternative routes (bypassing Russia) or completely stopped[73]. Permission for the transit transportation of these goods across Russia creates the possibility of arranging the supply of food products from Europe to China through a single channel: by cargo accumulation in the Kaliningrad region by rail through a single European 1,435 mm gauge or other means of transport for the subsequent delivery of these goods to China.

Conclusion

The Kaliningrad region has significant potential for increasing exports to China through its own cargo base and by accumulating goods from European countries with purpose to their subsequent delivery to China. The own cargo base of the Kaliningrad region is mainly formed by agricultural products, but the share of products of other industries, including high-tech ones, is also significant. China already imports these goods from other European countries, so the Kaliningrad region, adjacent to these countries, can also become a supplier of popular goods in China. Cargo accumulation in the Kaliningrad region from Europe is possible due to the presence in the region of developed transport and logistics, including storage, infrastructure.

Realization of the logistic potential of the Kaliningrad region could significantly contribute to the achievement of two important goals: the implementation of the decree of the President of Russia on increasing the volume of non-resource exports and exports of agricultural products, as well as increasing the level of loading of trains coming from Europe to China, and reducing the number of empty containers following this direction.

Regional authorities and export development institutes offer a wide range of services to support enterprises planning to entry their products into the Chinese market.

[73] Source: ITI assessment.

CONCLUSIONS

Conclusions

In the view of modern container flows of cargo by rail between Europe and China, despite the dynamic growth of their volumes, there are two serious imbalances.

The first of these lies in the uneven distribution of load between checkpoints in Europe at the entrance to 1,435 mm gauge: 90% of all container rail transportations between China and the EU is through Brest, which entails downtime of trains at the border, and the inability to provide the necessary level of control. There is an objective need for the distribution of container flow of cargo entering Europe between several points, and the Kaliningrad region can fully become such a point. The existing capacities of the TLC Kaliningrad allow handling flow of cargo of 450 thousand TEU per year (total with the TLC Chernyakhovsk – 750 thousand TEU), and the volume of actually handled container cargo in Kaliningrad in 2018 amounted to 150 thousand TEU. With its developed transport and logistics infrastructure, the region provides wide possibilities for industry participants: from reloading trains from one gauge to another gauge to multimodal services.

The second imbalance in the industry is linked with the uneven volume of trade flows between Europe and Asia, with a significant advantage in favor of the European direction. The Kaliningrad region can also help increase the level of loading of trains traveling in the Asian direction: at the expense of its own cargo base and acting as collection point for goods from European countries with purpose to their subsequent delivery to China by rail.

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