

Greece Shipping Report Q4 2015

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Abstracts

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BMI View: Within a turbulent economic and political climate, Greek ports and shipping continue to show resilience as they focus on their roles as regional gateways and transshipment hubs rather than relying on domestic demand. We forecast positive growth at the ports of Piraeus and Thessaloniki in 2015 and the medium term. The new government is attempting to have investment committed to the ports as part of privatisation agreements and is also targeting Greek ship owners with new taxation scheme propositions.

Adding to these considerations, early elections to be held in September create a greatly volatile market. The port of Piraeus remains the leading Mediterranean container hub and diversification strategies implemented by COSCO, which operates two of its terminals, have helped the port establish itself as a transshipment hub and delinked it from domestic market downturns. Privatisation of up to 67% of the port's shares will also mean EUR300mn in investments in the port within the next five years, according to the suggested terms of the current government. Development projects in the pipeline include dredging work, rail link improvements and storage for bulk materials. The port of Thessaloniki, which has recorded growth in volumes handled in the first half of 2015 compared to 2014, will also benefit from similar privatisation terms. The port plans to develop new sites at the container terminal and additional storage for cargo amongst other projects. Economic growth forecasted for Thessaloniki's trading partners of Serbia, Macedonia, Albania and Bulgaria also support trade volume forecasts for the port. However, stricter taxation around ship owners based in Greece may harm activity levels in Greek ports if companies choose to relocate as a result of these taxes being rolled out. Nonetheless, BMI believe that the country's favourable location will help it retain trade volumes.

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