



Conditions for the Success of Trans-Siberian Railway Landbridge

Hisako Tsuji

Economic Research Institute for Northeast Asia (ERINA)

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禁無断転載

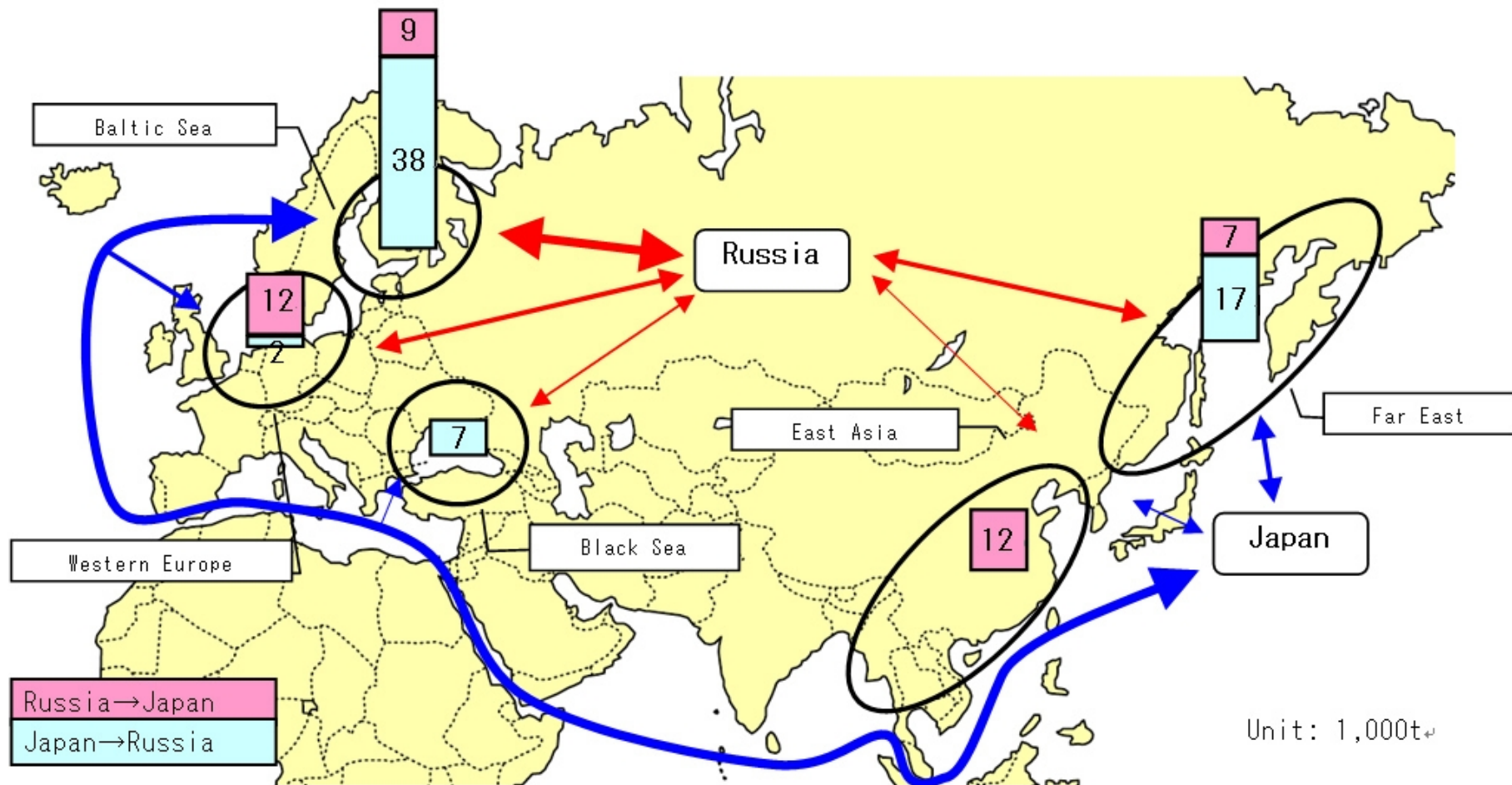
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 - Price comparison versus Deep Sea
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- **Strengthen economic competitiveness of the TSR route**
 - Competitive and flexible tariff policy
 - Promote competitive environment
 - Alternative routes
- **Seamless transportation service**
 - Customs clearance

Japan-Russia container shipment by port region (November 2008, MLIT-Japan)



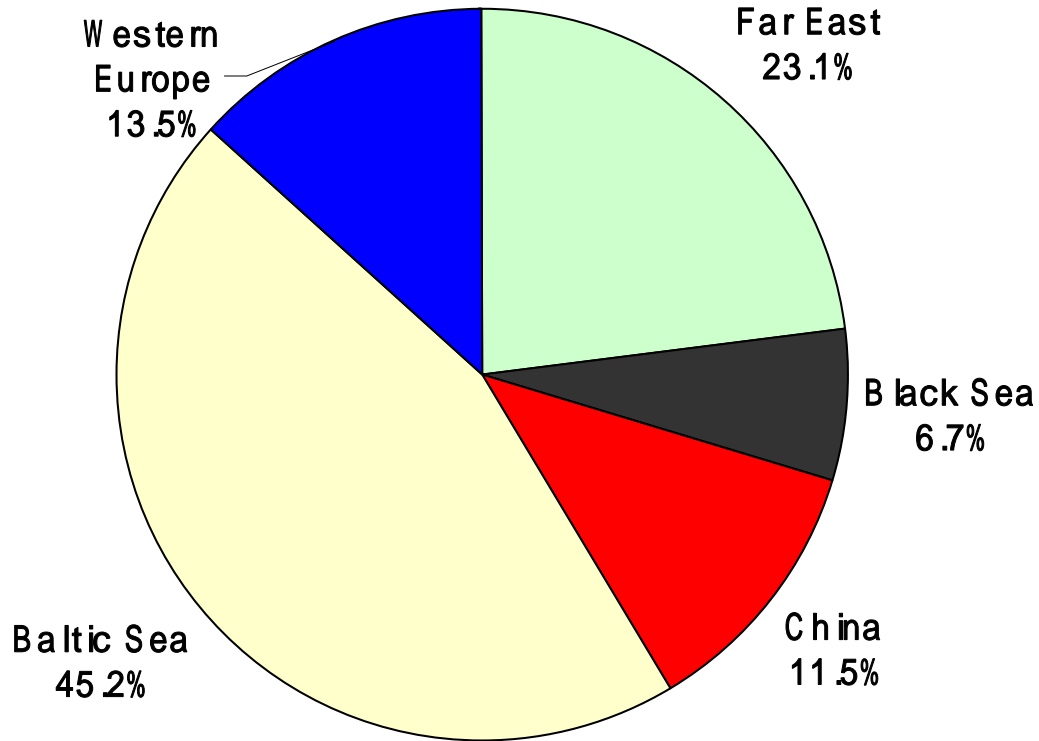
資料：「平成 20 年度全国輸出入コンテナ貨物流動調査」

Japan-Russia container shipment by port region

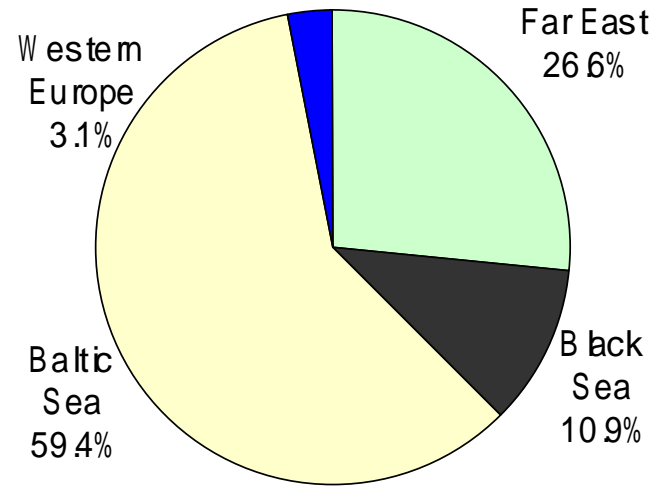
(November 2008, MLIT-Japan)

Baltic Sea (45%), Far East (23%)

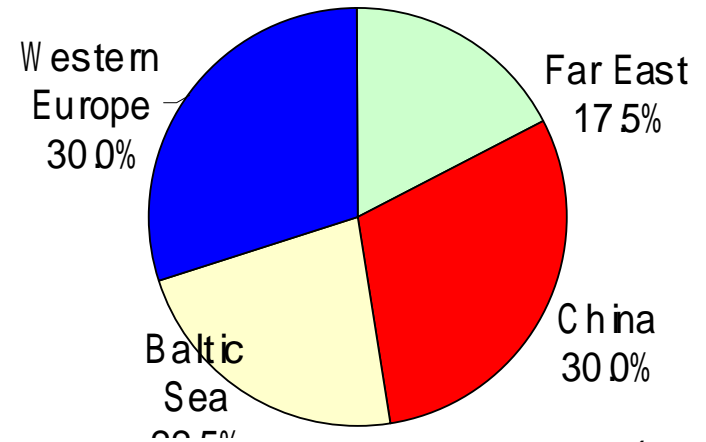
Japan Russia :10.4万 t



Japan Russia :6.4万 t



Russia Japan :4.0万 t

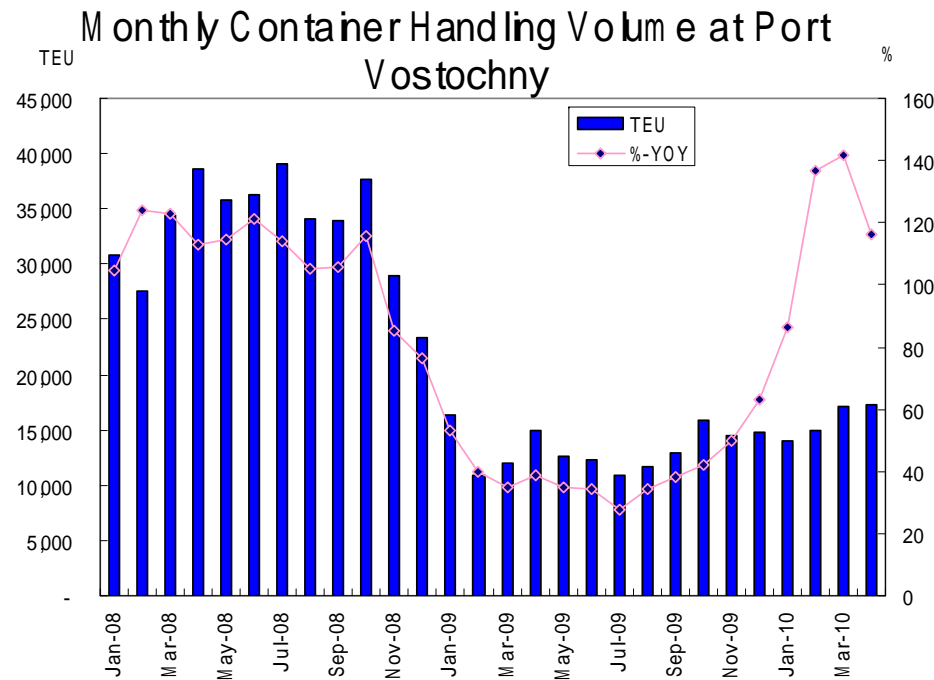


Impact of the global financial crisis

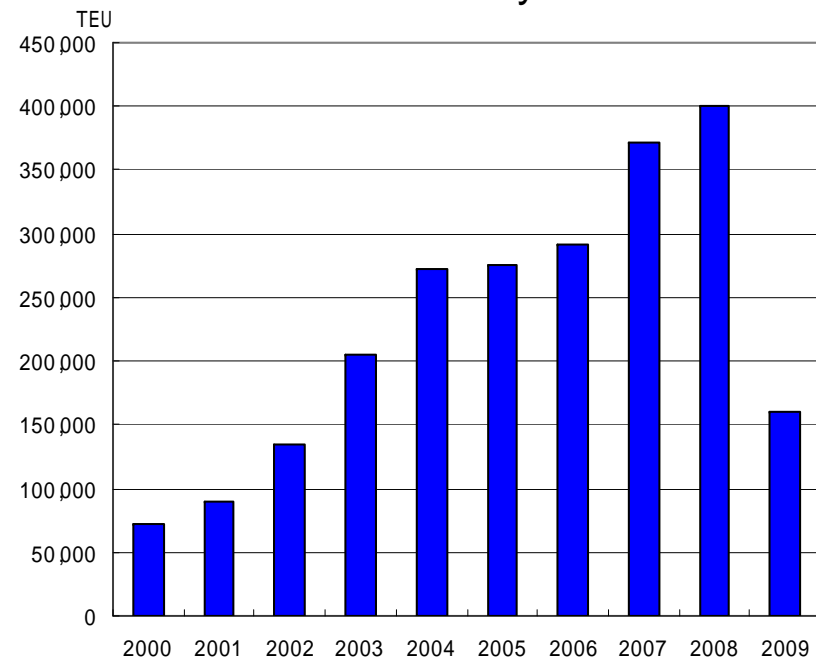
Container handling volume at Port Vostochny

-60% decline in 2009

-Severe decrease of Korean 'Project Cargo' for local car manufacturing

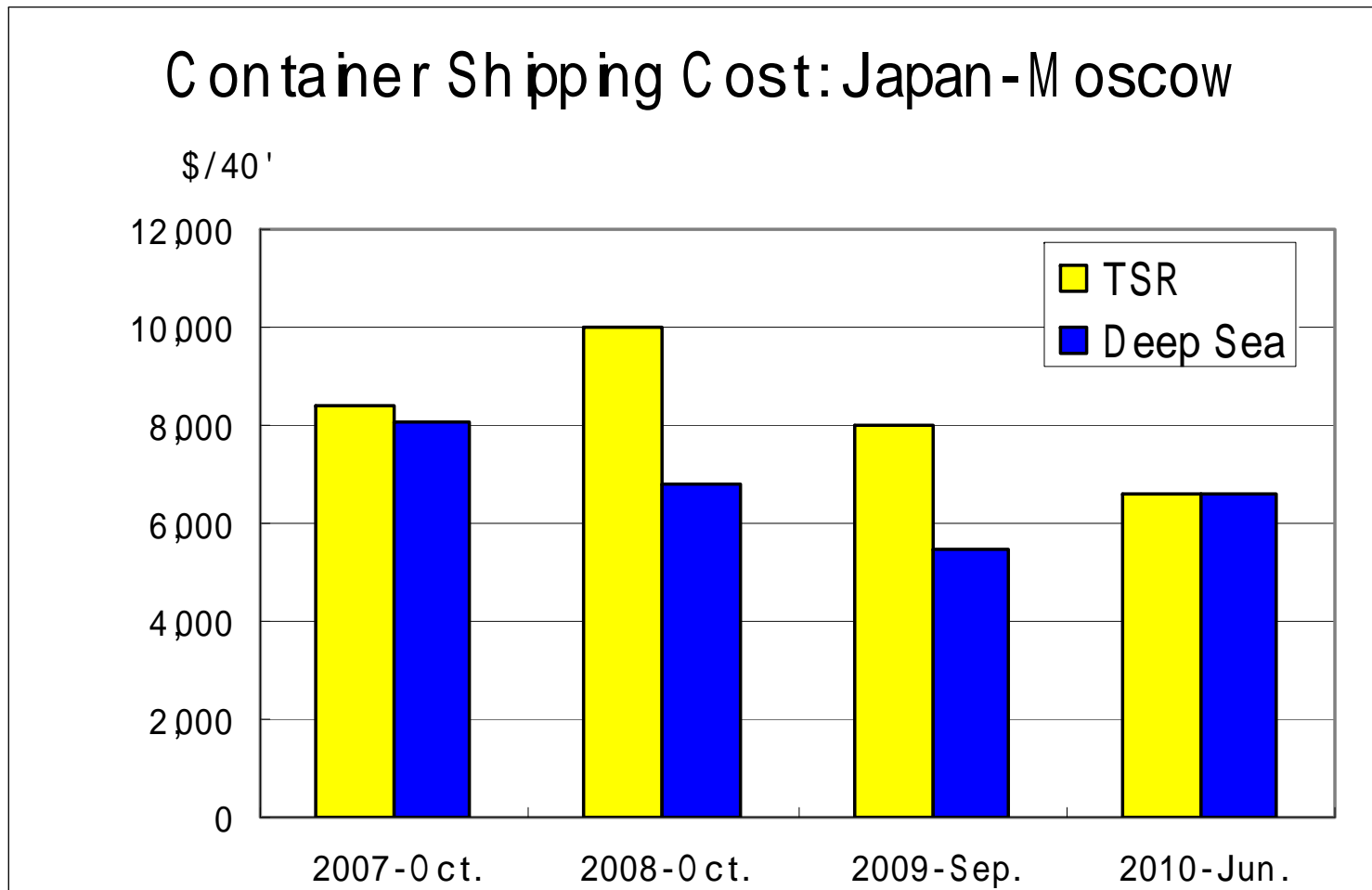


Annual Container Handling Volume at Port Vostochny



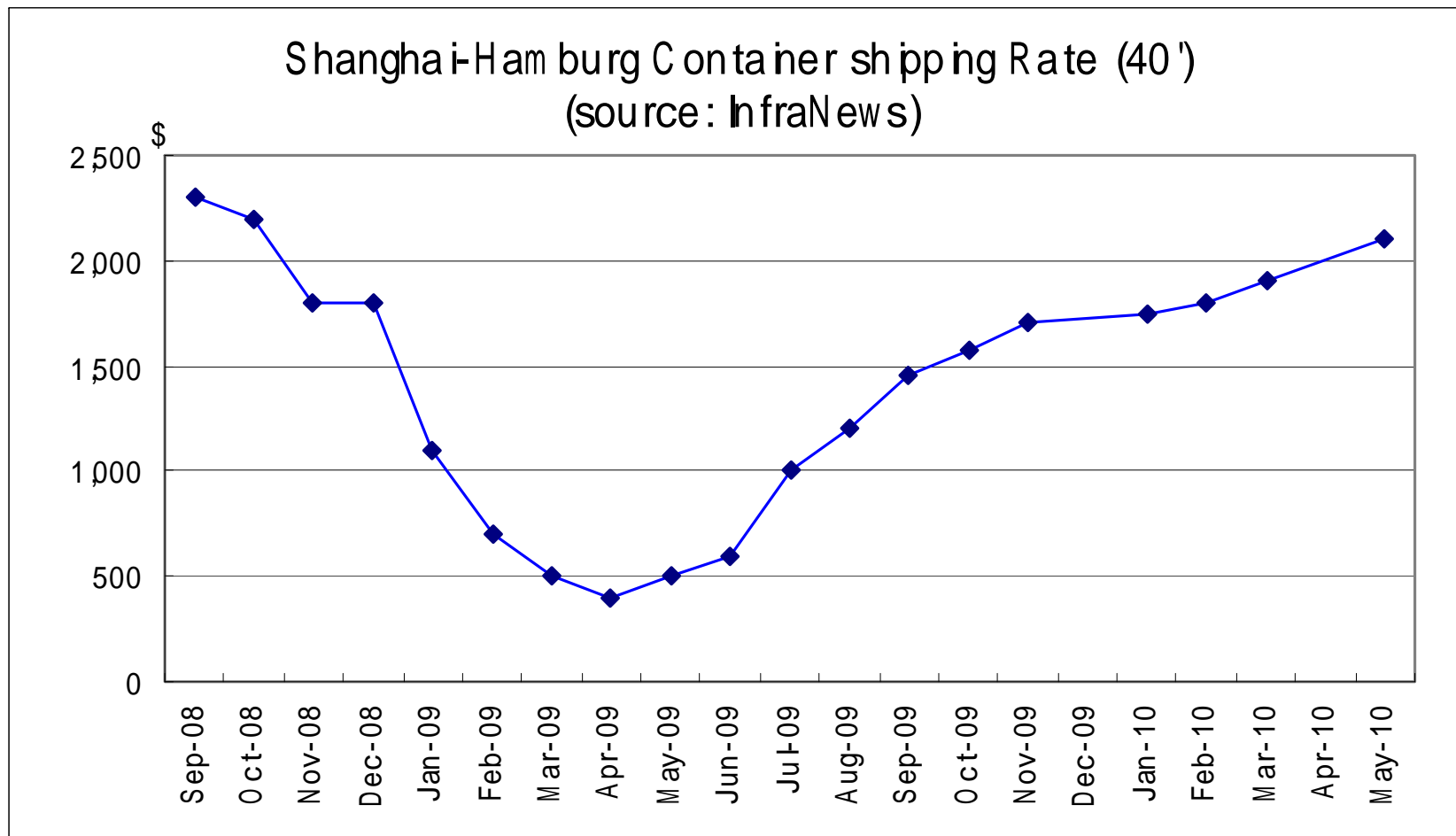
Price comparison versus Deep Sea

- TSR rate is higher than Deep Sea rate between East Asia and Moscow most of the time
- Consignors tends to choose lower cost than faster delivery



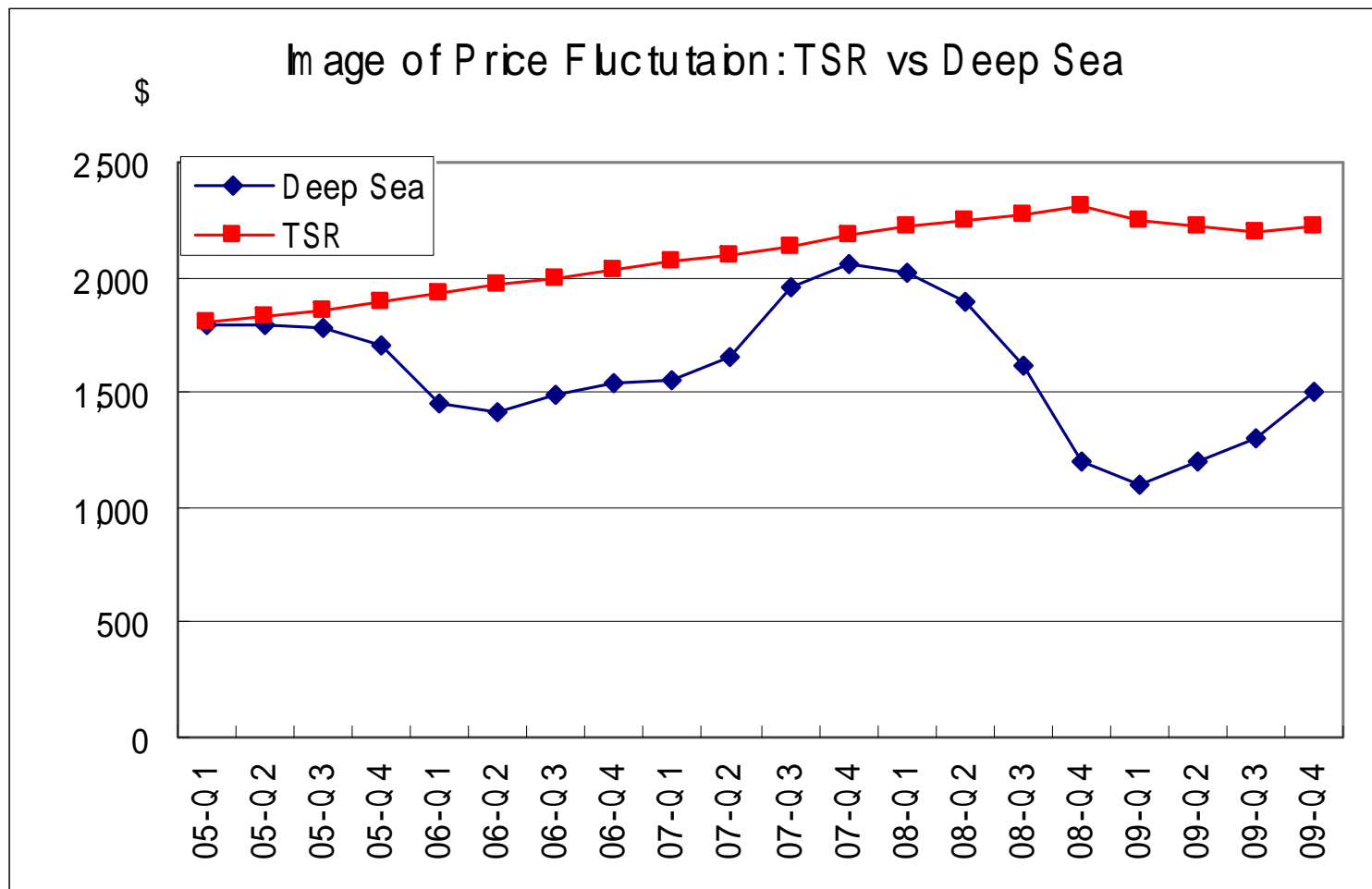
Impact of the global financial crisis

Sharp Decline of Deep Sea rate during the recession period

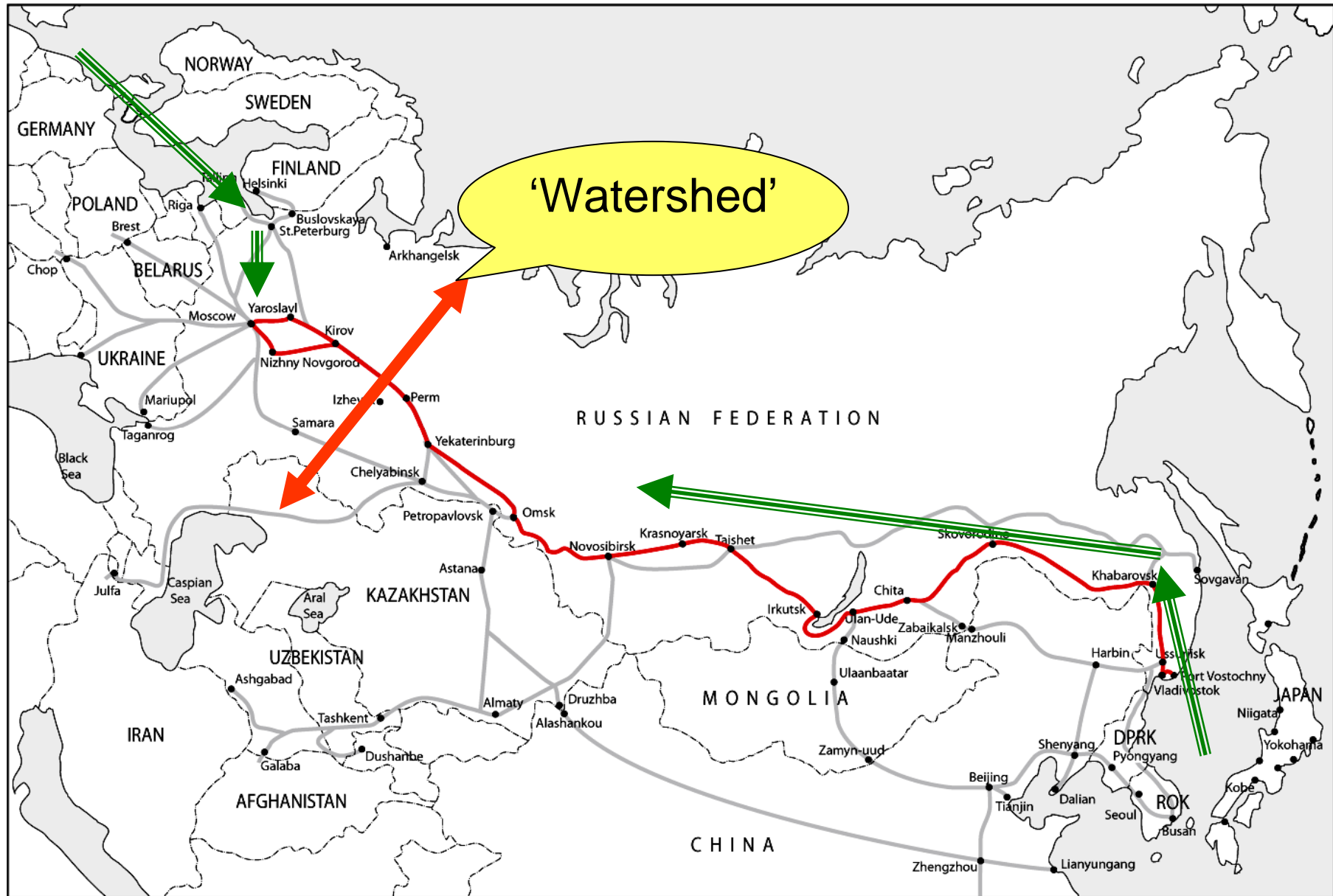


Fluctuating Deep Sea rate vs. stable TSR rate

- Loss of price competitiveness vs. Deep Sea under an economic recession



The Trans-Siberian Land Bridge Network





Strengthen competitiveness of the TSR Route

- Keep the TSR rate low by a cooperation of multiple modes
 - Eliminate 'Convoy fee'
- Flexible tariff policy
 - Competitive tariffs versus fluctuating Deep Sea rate
 - Keep the 'Watershed' around Moscow area
- Promote competitive environment - avoid monopolistic abuse
 - Encourage entry of multiple shipping lines (Japan – RFE)
 - Develop alternative modern ports and stevedores in RFE, by government's initiative
- Develop alternative competitive routes
 - Zabaikalsk route
- Customs clearance
 - Introduce electronic customs clearance system

Zabaikalsk

Transshipment Station

- Creating competition versus
traditional TSR route

