



Transport Sector Coordinating Committee Meeting

TA6694 REG
Containerization in CAREC region
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KEY INSIGHTS



Seaports are major bottlenecks in the Caspian Sea, especially **Aktau** and the **limited vessel fleet**.

For road, often **long waiting time at the ports**. Railways connectivity for trains have improved. However, **digitalization** and **data integration** are much needed to connect the silos.



Mismatch in handling capacity in BCPs is the major issue for container movements, especially at **Zamiin-Uud**. There is much needed improvement on the cranes, terminal operating system and the rail platforms.



Port dwell time at Karachi is a major constraint. This is caused by **collection and delivery procedure**, strict requirements on Afghan Transit Trade, and the first mile/last mile connectivity to the port. **Rail has the potential to boost container volume** but major infrastructure investment is needed.



Transit drives the demand for container freight. **The PRC-Europe traffic** is the main engine driving container block trains in near future. Alashankou-Dostyk and Horgos-Altynkol are key nodes but **constraints on the Kazakhstan side impede seamless movements**.

ESTIMATION ON THE CONTAINERIZATION LEVEL

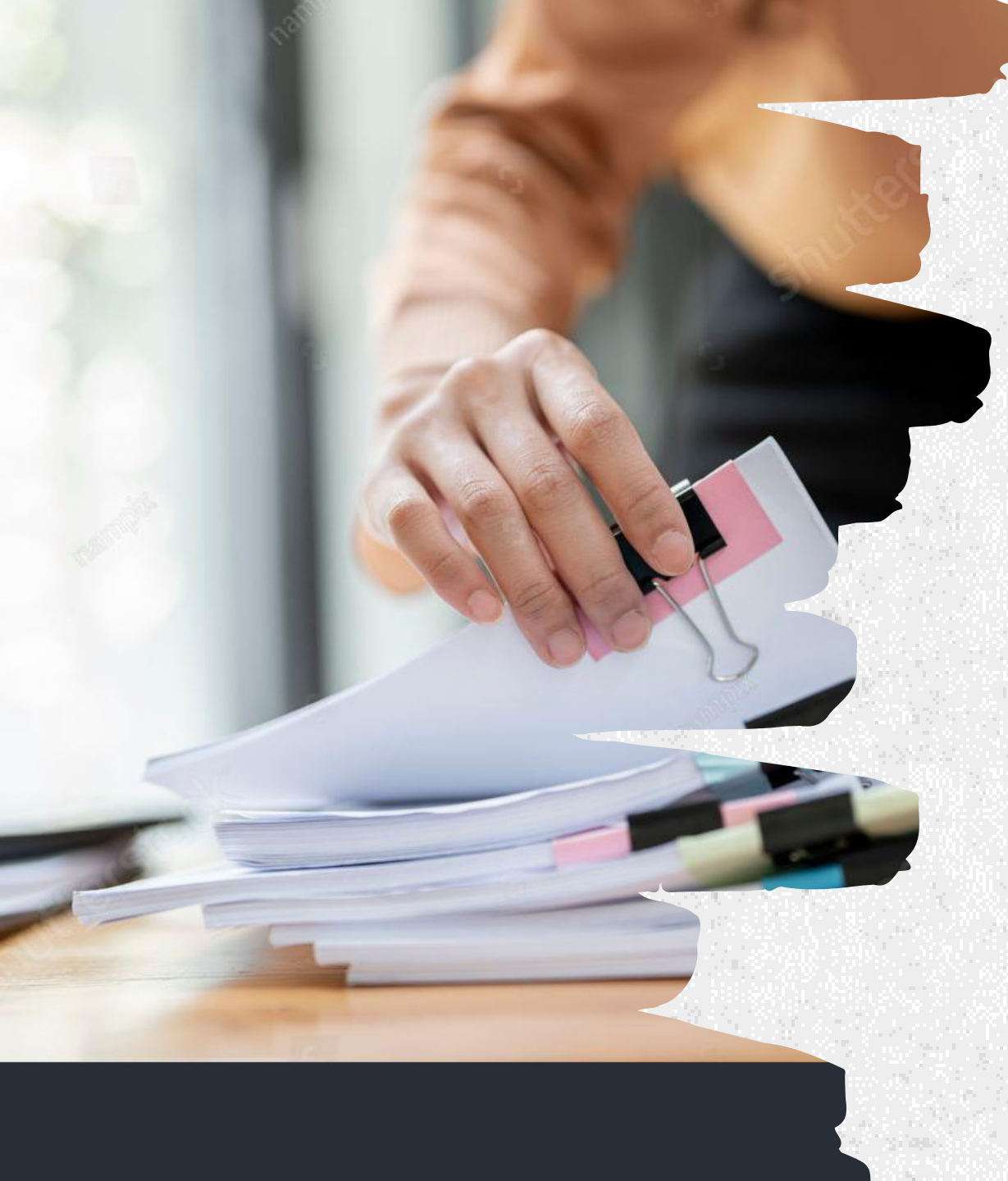
Countries	Containerization level
Azerbaijan	3.67%
Georgia	13.15%
Kazakhstan	2.62%
Kyrgyz Republic	7.1%
Mongolia	6.01%
Pakistan	57.21%
PRC	18.72%
Tajikistan	0.2%
Turkmenistan	0.38%
Uzbekistan	9.07%

PROJECTED CONTAINER FREIGHT TRAFFIC GROWTH

To the Year 2030

No.	Cluster	Low growth	Base Case	High growth
1	Middle Corridor	100,100	272,200	643,600
2	PRC-Mongolia	753,200	1,608,000	3,743,000
3	South Asia-Central Asia	41,000	91,900	167,000
4	PRC-Europe	2,774,000	5,098,300	6,181,000

Units in Twenty Equivalent Units (TEUs)



SPECIFIC HIGHLIGHTS

These are the key issues and impediments identified in the study, and requires urgent intervention.

#1: MIDDLE CORRIDOR

	Arrival	Departure	Dwell time
Containership Barys			
Alat Seaport	21/08 10:47	21/08 23:37	12 hours
Aktau Port	23/08 13:44	25/08 05:56	1 day 15 hours
Alat Seaport	26/08 18:40	27/08 12:01	17 hours
Alat Seaport	01/09 01:10	01/09 12:21	11 hours
Aktau Port	05/09 06:36	06/09 22:08	1 day 15 hours
Aktau Port	11/09 00:24	12/09 11:05	1 day 10 hours
Containership Sunkar			
Alat Seaport	21/08 06:35	22/08 00:12	17 hours
Aktau Port	23/08 12:08	25/08 11:00	1 day 23 hours
Alat Seaport	27/08 15:32	28/08 10:59	19 hours
Alat Seaport	01/09 15:36	02/09 03:42	12 hours
Aktau Port	04/09 22:49	06/09 20:24	1 day 21 hours
Alat Seaport	08/09 18:20	09/09 19:32	1 day 1 hour
Aktau Port	11/09 15:51	12/09 22:08	1 day 6 hours
Alat Seaport	14/09 10:25	15/09 02:39	16 hours
Aktau Port	17/09 17:46	20/09 15:05	2 days 21 hours

Long delays at Caspian crossings!

1. Caused by limited number of container ships.
2. Materials handling equipment needs to be modernized.
3. Kuryk does not have a terminal operating system.

Source: Consultants, compiled from My Ship Tracking.
<https://www.myshiptracking.com/>

#2 PRC-MONGOLIA

Thousands of containers held up at Tianjin port!

1. Low throughput at Zamiin Uud BCP.
2. Inefficient container handling at the container terminals in Ulaanbaatar.
3. Need for a new logistics park in Ulaanbaatar.

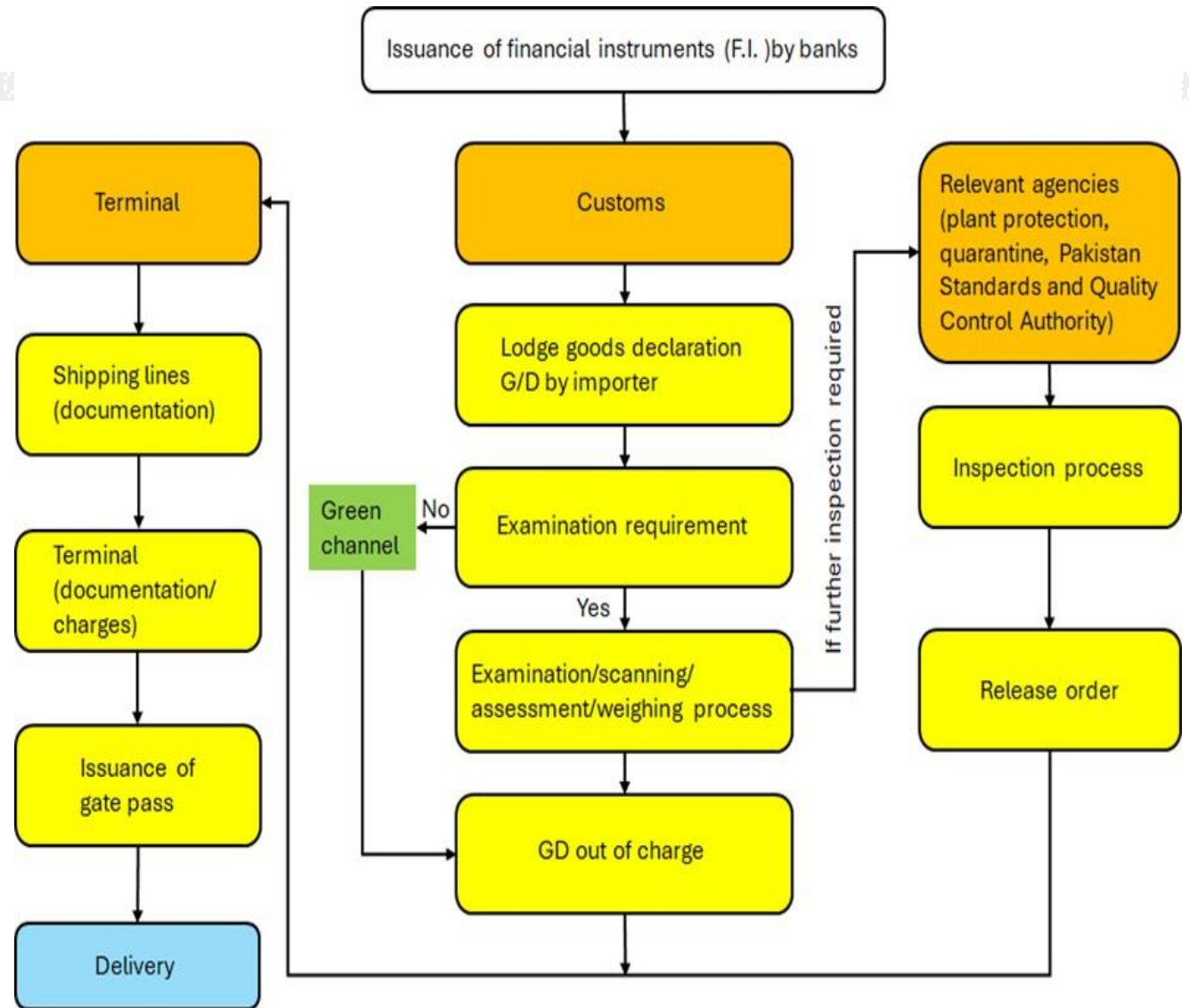


#3 CENTRAL ASIA-SOUTH ASIA

Cumbersome procedure to collect containers from Karachi Port

Constraints in Seaports and BCPs

1. Require 3 to 5 days to move containers from Karachi port.
2. Torkham and Chaman are time-consuming BCPs
3. No rail connectivity (yet).



PRC-EUROPE



1. Alashankou is top ranked and serve PRC-Kazakhstan-Russia-Europe, while Khorgos tends to serve more Central Asian bound traffic.
2. Erenhot also serves China-Europe traffic, though the volume is more limited compared to Alashankou and Khorgos.



Constraints at Dostyk BCP

Approx 55 container trains queuing at the border as of late September 2024. Central Asia also lacks inland container handling facilities / multimodal operations.



CONCLUDING REMARKS

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CONCLUDING REMARKS

- Container freight traffic is growing fast in Central Asia, driven by **transit volume** from PRC.
- However, there are **constraints in seaports, BCPs and inland facilities** that impede multimodal operations.
- Container provides a **safe and secure way** to transport goods over long distances.
- Due to historical and geographical factors, Central Asia is still 'experimenting' with containers. CAREC members can learn from other members with a maritime sector (**Georgia, Pakistan and PRC** which also have higher level of containerization).
- CAREC can support members to develop **capacity building** in container shipping, and also devise a **national containerization strategy** (so far only Kazakhstan has developed it).



ADB



THANK YOU

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