

# DP WORLD

## ATP Conference

October 2016

Creating the Future, **Now.**



# Introduction to DP World

Creating the Future, **Now.**

# Global Presence

## AUSTRALIA & AMERICAS

- Argentina
- Australia
- Brazil
- Canada
- Dominican Republic
- Ecuador
- Peru
- Suriname
- USA

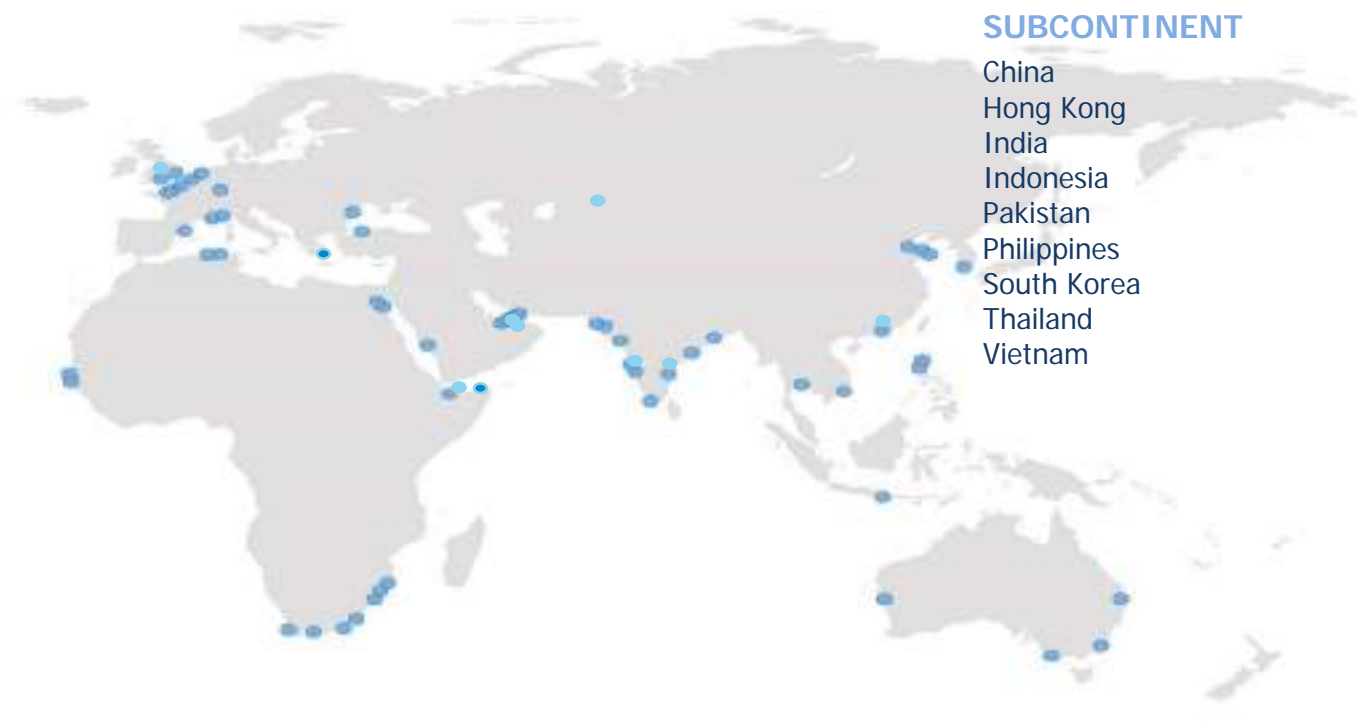
## MIDDLE EAST, EUROPE & AFRICA

- Algeria
- Belgium
- Cyprus
- Djibouti
- Egypt
- France
- Germany
- Mozambique
- Netherlands
- Romania
- Saudi Arabia
- Senegal
- Somaliland
- Spain
- Turkey
- UAE
- UK

## ASIA PACIFIC & INDIAN SUBCONTINENT

- China
- Hong Kong
- India
- Indonesia
- Pakistan
- Philippines
- South Korea
- Thailand
- Vietnam

- Port and terminals
- Industrial and logistics Zones



# About DP World

## SUSTAINABLE VALUE THROUGH GLOBAL GROWTH, SERVICE AND EXCELLENCE

DP World handles approx. 9% of the world's container trade

Around the world, DP World handles more than 150,000 containers a day

DP World is the fourth largest marine terminal operator in the world by throughput



Put end to end, the containers we handle in a year would circle the world more than eight times

Our yard area covers 1,374 hectares, the equivalent of almost 2,000 football pitches

We serve around 66,000 vessels a year – or nearly 180 a day



We operate more than 6,000 container handling cranes



Our team of more than 36,000 people is truly global, made up of more than 90 nationalities



DP World has more than 55 kilometres of quay wall globally

# Why DP World



## GLOBAL SPREAD

Six continents...over 30 countries...we are where our customers need us to be

## INNOVATION

Forever looking for smarter, safer and quicker ways to do things means we're always one step ahead of the competition`

## CUSTOMER SERVICE

Always asking what we can do better for our customers leads to unparalleled levels of service

## PRODUCTIVITY AND EFFICIENCY

Minimising vessel turnaround times and helping speed goods to market is a priority

## COMMON USER OPERATOR

No cross-ownership with shipping lines – we treat all shipping lines , ensuring that one shipping line doesn't control most traffic handled at the port

## FREE ZONES

The only global operator with a commitment to developing joint port and free zone projects; we have delivered successful joint projects in Dubai, London and Santo Domingo

# Flagship facility: Jebel Ali Port

## OUR FLAGSHIP FACILITY AND GATEWAY TO THE REGION

Jebel Ali is the world's largest man-made container port and the largest between Rotterdam and Singapore



Jebel Ali can accommodate any vessel size in existence or on order



Over the last 10 years average ship size at Jebel Ali has doubled



World's 9th largest container port in 2013



15 m TEU capacity today, 19m TEU in the second half of 2015



Total quay length of over 20 kms, a footprint of 12 million sq metres, 78 quay cranes



## Jebel Ali Free Zone

Creating a successful industrial /logistics zone

- 78 sq km
- Seamless link: Port to Airport
- 6 million sqf W/H inventory
- 5 million sqf office space
- 2.5 million sqf of On Site Residence & support facilities
- Over 7,000 companies including many Fortune 500 firms
- Many projects under development





# Introduction to DP World Americas

Creating the Future, **Now.**





## DP World Americas Region - Current Terminals

1. [Vancouver, Canada](#)
2. [Nanaimo, Canada](#)
3. [Prince Rupert, Canada](#)
4. [Saint John, Canada](#)
5. [Caucedo, Dominican Republic](#)
6. [Caucedo Logistics Center](#)
7. [Paramaribo, Suriname](#)
8. [Callao, Peru](#)
9. [Lurin, Peru](#)
10. [Buenos, Aires Argentina](#)
11. [Santos, Brazil – Emraport](#)
12. [Posorja, Ecuador](#)

# DP WORLD<sup>®</sup>

## Caucedo



DP World Caucedo is a world-class marine terminal and free zone, located in Punta Caucedo, Dominican Republic, 25 kilometers from the city of Santo Domingo which is the commercial and political capital of the country. The Port of Caucedo's main driver is in the combination of land, air and ocean transportation with the objective of projecting the Dominican Republic as a strong competitor in international markets and to be an example of development on a national and regional level.

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# DP WORLD

## Callao



In Callao, Peru, DP World operates one of the largest container terminals on South America's Pacific coast having been awarded a 30 year concession in 2006. DP World Callao is among the busiest terminals in the Port, which is the gateway to the capital city of Lima, home to more than eight million people and approximately 50% of the country's GDP. It has an annual average operating capacity in excess of 1M TEU; two contiguous berths totaling 650 meters of quay, capable of handling two post-Panamax vessels of around 8,000 TEU at the same time.

DP World Callao has achieved consistent marine productivity in excess of 30 Gross Moves Per Hour/Crane, making it one of the most productive terminals in Latin America.

Located in the south zone of the port of Callao, DP World works alongside Peruvian Customs, the National Port Authority and different Peruvian shipping associations to offer importers and exporters a complete logistics chain solution, including transshipment services requested by the world's top shipping lines. The future also looks bright for Peruvian ports as they position themselves as a gateway to Asia for the region.

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TRP, Terminales Río de la Plata, is located in Puerto Nuevo, Buenos Aires, capital city of the Argentine Republic. It is formed by DP World, Latin American Infrastructure Fund and other international partners.

Our mission is to make TRP the leading container terminal in South America, by providing the best service in accordance with global standards, meeting the expectations of all our customers and taking care of the physical and mental health of all our employees as well as their personal development and needs.

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# EMBRAPORT



Situated on the left bank of the Port of Santos, in the state of São Paulo, the Embraport terminal was constructed on 848,500 square meters of land and is strategically positioned to offer access by sea, rail and road.

Operating since July 2013, Embraport (Empresa Brasileira de Terminais Portuários) is the largest and most modern private terminal in the country. With investments amounting to R\$2.3 billion, the terminal has as shareholders Odebrecht Transport and DP World. This first phase of its operations offers 653 meters of long quayside, 207 thousand m<sup>2</sup> of container yard and annual handling capacity of 1.2 million TEUs. The Terminal is investing in complementary solutions to expand its logistics portfolio and provide integrated solutions to clients.

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# DP WORLD<sup>®</sup>

## Posorja



In June 2016, DP World was awarded a 50 year Concession to build and operate Ecuador's new deep water port for Guayaquil, Ecuador's largest and main industrial city. The project will be carried out in multiple phases, with the first two phases each consisting of 400 meters of berth, and totaling 1.5 million TEU in Capacity once Phase II is completed. DP World Posorja will be able to handle super post-panama vessels of around 15,500 TEU and 395 meters LOA, positioning itself as Guayaquil main Deepwater Gateway. The port will also handle break-bulk, dry bulk, liquid bulk, ro-ro and cruise traffic.

DP World Posorja will have about 200HA available for logistics activities, warehousing, and open / covered cargo storage. Located in a special economic zone and adjacent to a 25 square kilometer industrial park, it will become the logistics hub for companies serving the west coast of South America.

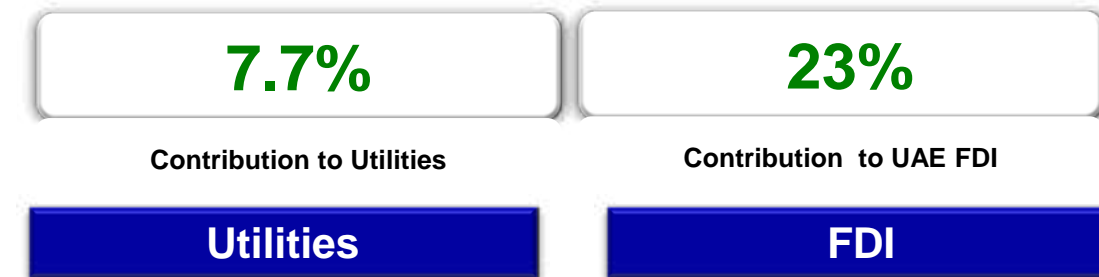
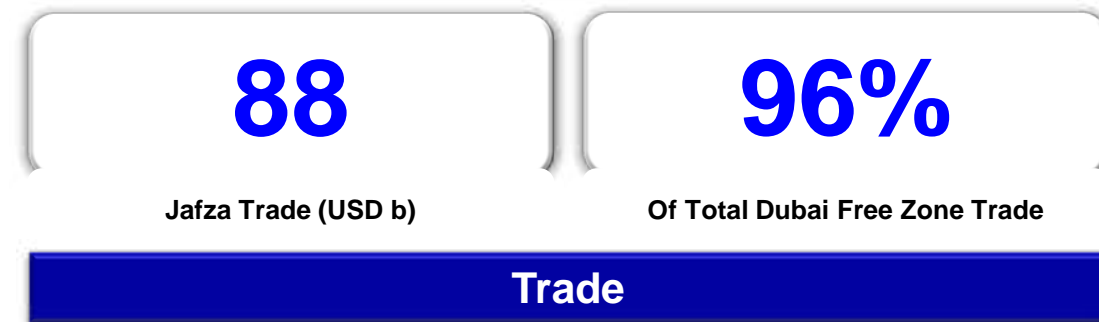
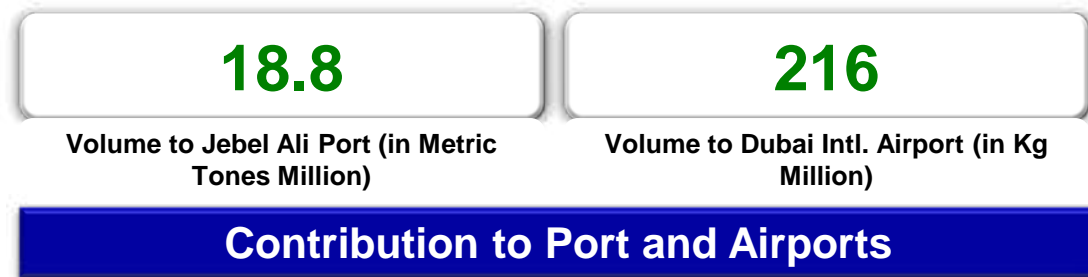
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# DP WORLD

## Beyond Marine Terminals

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# Economic Contribution





## Employment Contribution

**163,000**

**Direct Employment within Jafza**

**208,000**

**Jafza impact on gross employment  
within Dubai (incl .Jafza employees)**

**250,000**

**Jafza impact; additional Indirect  
employment in UAE**

Jafza's significant contribution to employment & human capital development within Dubai and UAE has resulted in other key economic benefits;

- **Over USD 700 million p.a.** spent on retail and hospitality sectors as an induced multiplier effect of employees spending their salaries on the economy.
- **Indirect impact on increased supply in residential and retail property to cater to increasing population with an expected 19,000 units of residential property and approximately 419,000 sqm of retail space in 2016 .**

# Major Companies in JAFZA

## ELECTRONICS & ELECTRICAL

No. of companies: 850+  
 Total employees: 11,335  
 Trade: USD 24bn



## METAL, STEEL, CONST. & INTERIORS



No. of companies: 750+  
 Total employees: 20,184  
 Trade: USD 4bn



## OIL AND GAS AND PETROCHEMICALS

No. of companies: 650+  
 Total employees: 26,710  
 Trade: USD 16bn



## MACHINERY & EQUIPMENT



No. of companies: 550+  
 Total employees: 29,579  
 Trade: USD 5bn



## AUTOMOTIVE & TRANSPORT

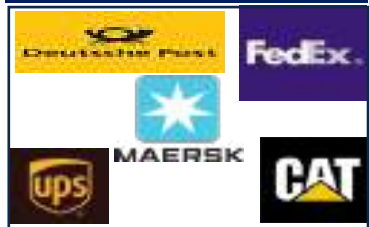
No. of companies: 450+  
 Total employees: 10,897  
 Trade: USD 7bn



## LOGISTICS



No. of companies: 300+  
 Total employees: 18,8667  
 Trade: USD 23bn



# London Gateway



# CLC CAUCEDO

## LOGISTICS CENTER



### CHARACTERISTICS

- Strategic location: Midpoint of the Americas Region, middle of the Caribbean
- Ideal platform for regional distribution
- Conveniently located inside port
- Purpose-built warehousing available
- Excellent opportunity to optimize your company's supply chain
- Port location has the least possible deviation for the interconnection of east-west and north-south routes, above any other port in the region
- Seamless container transport from quay to warehouse
- Office space available for lease based on customer's need

### ADDITIONAL SERVICES

- 24/7 operations
- Recruitment and selection of personnel
- Safety best practices and labor training
- Banking, food services and carrier's agents
- Sea freight, air freight booking offices
- Fiber optics connection
- Electrical substation and backup generation
- Housekeeping and waste disposal
- X-ray scanners at gates
- Radioactive detection portals
- CCTV surveillance system
- Biometric access
- Highest security in the region

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## Posorja (Ecuador) Logistics Center



### FEATURES

- Direct Port Connectivity
- Ideal platform for West Coast South America logistics
- Approximately 200HA of land for development
- Tax incentives

**Taking the Port closer to the Market.**



**DP WORLD LURIN – Features & Benefits**

- Container exchange point:
  - 54,000 m2 of land area.
  - Empty Container reception, inspection, cleaning/washing, repair, classification.
  - Assignment for export gate out.
- Reefers:
  - NOR reception, inspection, etc.
  - Empty positioning to be agreed.
  - PTI
  - Assignment for export gate out.
- Cargo services:
  - Container stuffing & stripping
  - Off-customs storage (SADA)
  - Palletization
  - Container lining, and provision of stuffing materials.
- Shippers, Truckers, 3PLs, CHB:
  - Faster service! Avoid congestion in Callao by handling MTY containers closer to origin/dest area.
  - Overnight parking area with basic amenities
  - Appointments through DPW VBS system
  - Opportunity for more round trips.

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**DP WORLD LURIN – Inland container depot in the fastest growing industrial and logistics complex in Peru.**



# Role of Private Terminals

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## Private Terminals in the Americas





## Role of Private Terminals

- Often wrongly perceived as smaller, single-user terminals
- Critical infrastructure in many markets to meet infrastructure requirements, both in terms of capacity and vessel size requirements
- Critical that governments treat all port investors fairly, recognizing that “fair does not mean identical”
- Typical areas of differentiation
  - Concession fees
  - Tariff issues
  - Cargo handling restrictions
  - Regulations and compliance



# DP WORLD

## DP World and Innovation

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## Global Terminal Operators as Innovators

- Corporate office team focused on driving and sharing innovations across our 77 terminals
- 36,000 staff as potential innovators
- Best practices sharing across terminals
- Each terminal has an “Innovation Champion”
  - Promotes innovative thinking amongst the local staff
  - Shares new innovations with other terminals
  - Identifies solutions from other terminals that could be applied locally



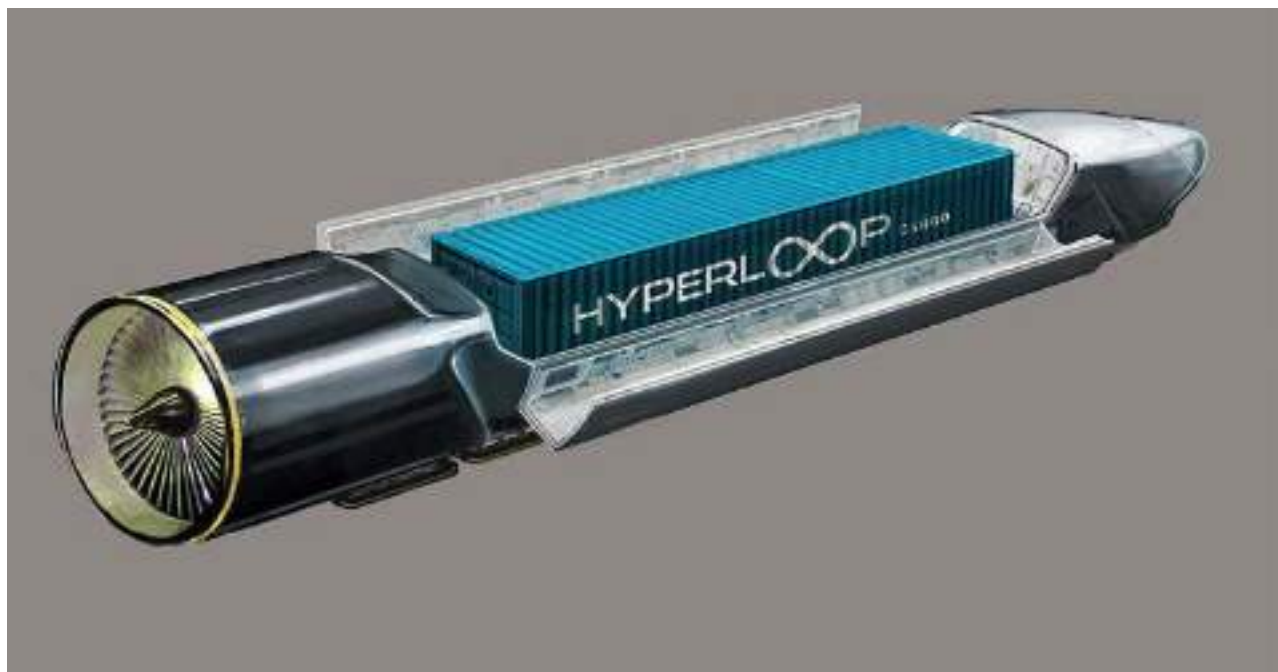
## Innovation is more than Automation



## Non-Container Cargo Handling



## Logistics



**P&O**   
**Maritime**



## Information Technology



دبي التجارية  
DUBAI TRADE



## Environment



- Deployment of electric RTGs and RMGs
- Fuel-reduction technologies, including downsized motors
- Advanced lighting solutions





# Security



# Safety



## Commercial

- Key component of innovation
- Key incentives to innovate:
  - Cost savings
  - Increased revenue
- Regulated tariff environments can be a major obstacle to innovation
- Tariff innovation itself can have a massive impact on productivity and terminal capacity
  - Re-stow charges
  - High cube charges





**THANK YOU**

Creating the Future, **Now.**