



GRIMALDI GROUP

15th Intermodal Africa , April 2016

Growth for Ro-Ro and project cargo shipment in Ghana

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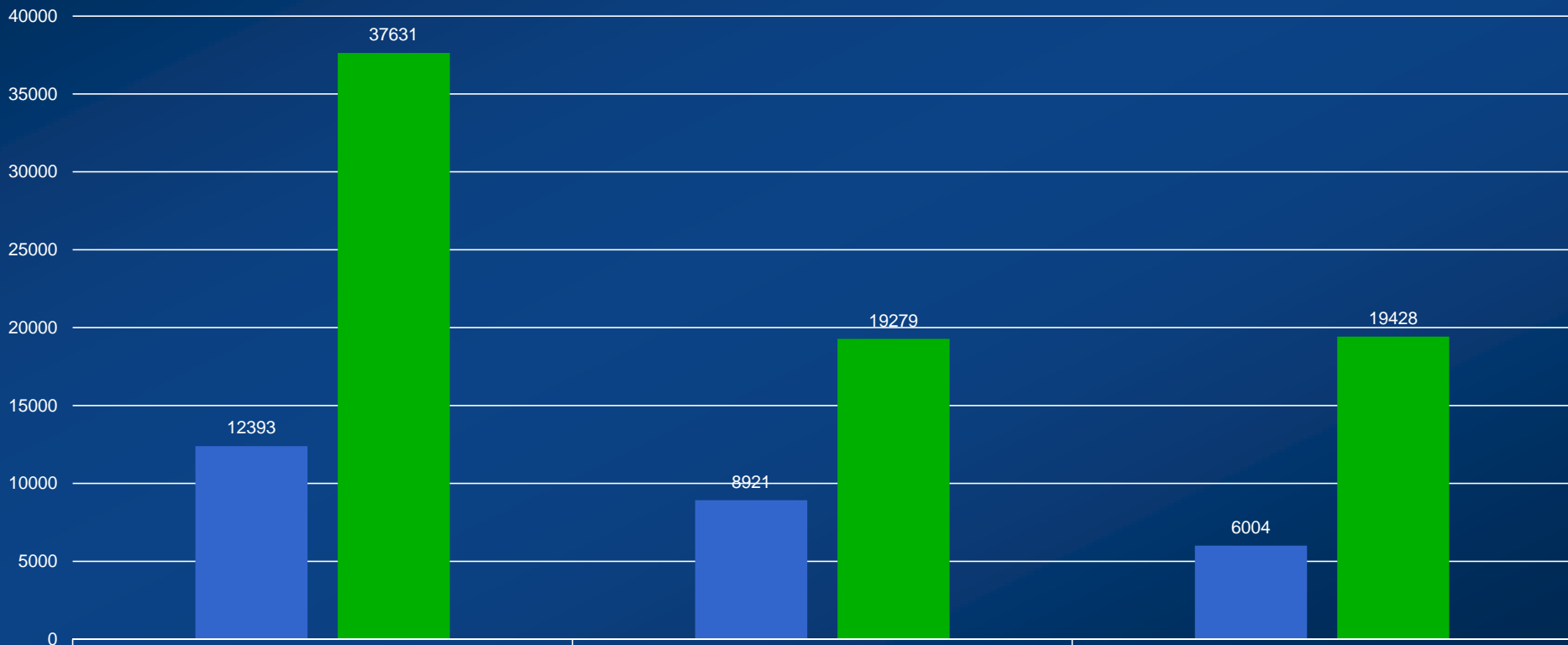


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RORO IMPORTS IN GHANA 2013-2015

C/V

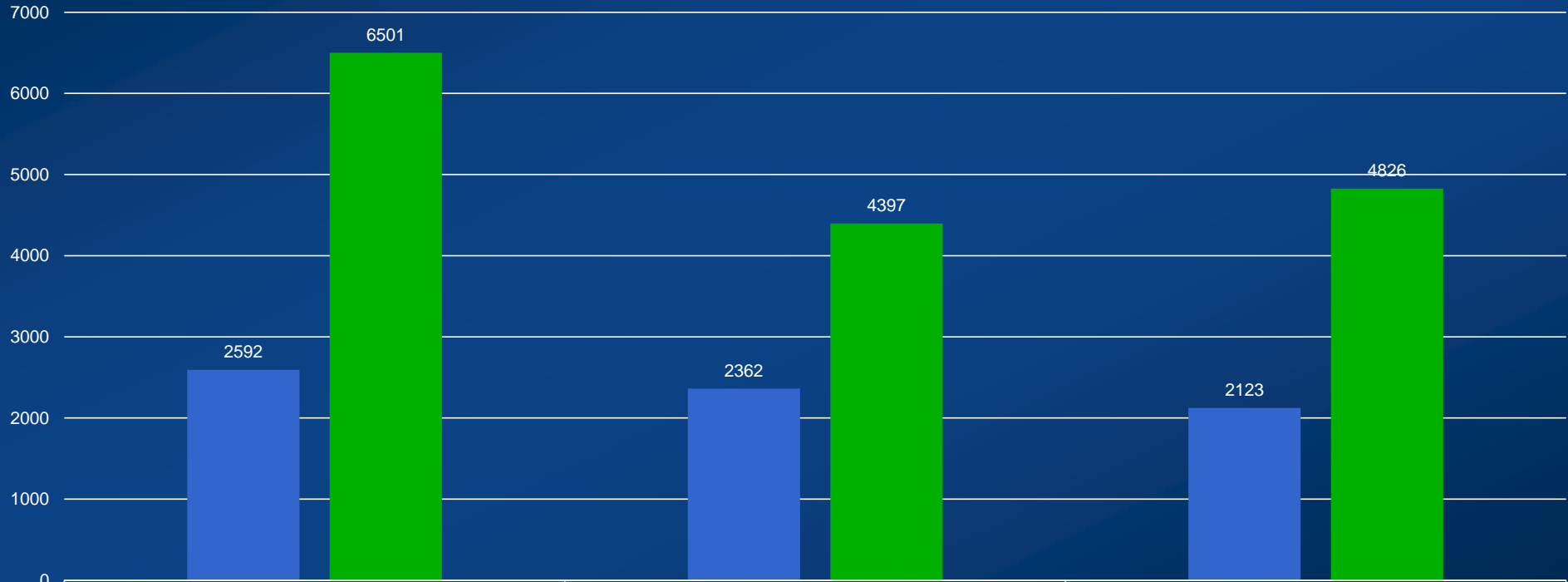


	2013	2014	2015
FE	12393	8921	6004
NE/MED/USA	37631	19279	19428



RORO IMPORTS IN GHANA 2013-2015

TRUCK



	2013	2014	2015
FE	2592	2362	2123
NE/MED/USA	6501	4397	4826



RORO TRENDS AND GROWTH : + facts and expectations -

- 2015 has shown slight recovery in the trucks segment over 2014
- 2016 shipments started with clear signs of recovery of RoRo imports
- Elections of 2016 expected to boost activities in 2016
- Established Projects are creating a positive outlook for the near future
- Port expansion will provide great potential for further business development in the roro market demand
- Stability of the currency ROE expected to further help demand consolidation
- Global economic climate has seriously affected economical activities in Ghana since 2013
- Low oil/commodity prices are affecting Ghana's budgeting
- Import taxes regulations and general increased cost of doing business might have negative impact on demand side



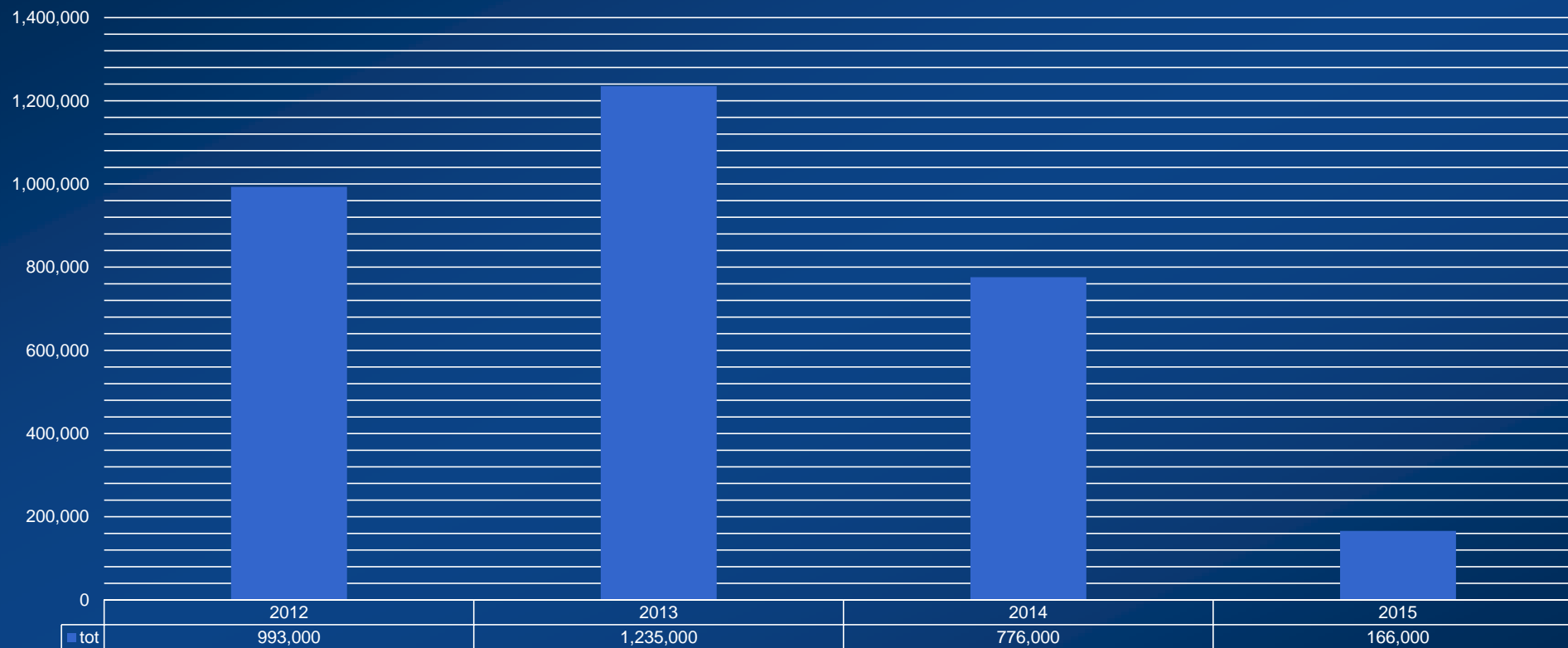
PROJECT CARGO :

the facts behind the trends 2012 2015

- Strongly correlated to :
 - mining sector
 - Oil and Gas
 - Infrastructural projects
 - Power generation projects
 - Peak of shipments in 2012 2013
 - Drastic reduction from 2013 onward
- Why expectations are bright :
- Macroeconomic internal consolidation and improvements are on track
 - Geopolitical attractiveness remain the highest
 - FDI expected to growth again
 - Energy sector requirements high on the govt agenda : potential demand for project cargo
 - Approved long list of infrastructural projects waiting for financing



Project cargo trends 2013 2015*



* the figures are in tots and are extrapolated projections



Grimaldi Services : investing in the growth

- New G4 Grande type vessels added into services calling Ghana
- G4 offering higher capacity with max flexibility
- Improved frequencies and T/T on all legs connecting to Ghana
- Average 2 calls per week



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THANK YOU