



DP WORLD

Global Ports Connecting Global Markets



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Congratulations!

9th Southern Asia-2014

- Logistics, Ports and Shipping

Arise, Awake and Stop not until your Goal is achieved

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Indian Ports Benchmarking against Global Standards



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Global

New Dynamics & New Demands



| S.no | Country | GDP in Trillion USD |
|-----------|--------------|---------------------|
| 1 | USA | 17.4 |
| 2 | China | 10.4 |
| 3 | Japan | 4.8 |
| 4 | Germany | 3.8 |
| 5 | France | 2.9 |
| 6 | UK | 2.9 |
| 7 | Brazil | 2.2 |
| 8 | Russia | 2.0 |
| 9 | Italy | 2.1 |
| 10 | India | 2.0 |
| | Total | 50.50 |

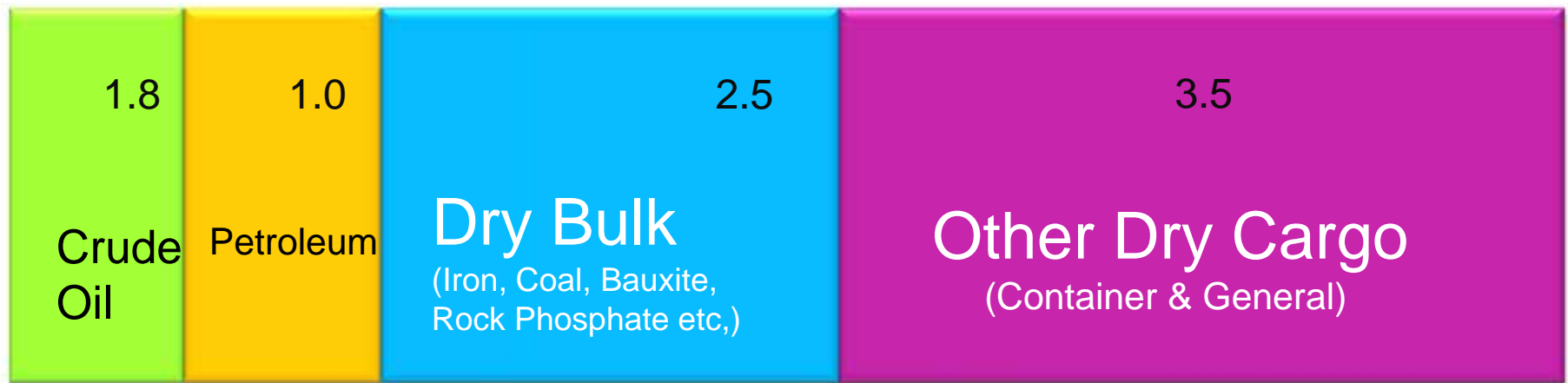
Top 10 Countries constitutes 66 %⁵



World's Sea Borne Traffic-2013

Tanker
2.8 Bn tons

Dry Cargo
6.0 Bn tons



1 2 3 4 5 6 7 8

Billion Tons- Cargo loaded



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Global Container Volume

- **1980** : **20** million TEUs
- **2000** : **230** million TEUs
- **2013** : **540** million TEUs
- **2015** : **780** million TEUs

2020 : **1 Billion TEUs**



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Regional Container volume (in mn TEUs.)

| Region | 2004 | 2008 | 2013 |
|----------------------|------|------|------|
| Asia | 159 | 271 | 278 |
| America | 62 | 91 | 93 |
| Europe/Mediterranean | 74 | 106 | 108 |
| Others | 37 | 58 | 60 |
| Total | 332 | 525 | 540 |

Global Containerization

- Developed : 80%
- Developing : 65%
- China : 55%

India : 22%



Top 10 Global Ports (in mn TEUs)

| S.no | Port | 2013 |
|------|-----------------|------|
| 1 | Shanghai | 34 |
| 2 | Singapore | 33 |
| 3 | Shenzhen | 23 |
| 4 | Hong Kong | 22 |
| 5 | Busan | 18 |
| 6 | Ningbo-Zhoushan | 17 |
| 7 | Qingdao | 15 |
| 8 | Guangzhou | 14 |
| 9 | Dubai | 14 |
| 10 | Rotterdam | 12 |

Top 10 Ports : 200 mn TEUs



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Containers- Asia-2013

- Singapore : 32 mn
- Hong Kong : 28 mn
- Malaysia : 22 mn
- China : 180 mn

India : 10 mn



India - New Dynamics & New Demands

India's Trade Growth

| Trade/Year | 2010-11 | 2011-12 | 2012-13 | 2013-14 | 2014-15 (E) |
|-----------------------|------------|-------------|----------|------------|-------------|
| Exports (\$Bln) | 246 | 304 | 297 | 312 | 340 |
| Growth YOY | 33% | 21% | (2) | 4% | 9% |
| Imports (\$Bln) | 351 | 489 | 490 | 450 | 490 |
| Growth YOY | 18% | 32% | 1 | - 8% | 9% |
| Total Trade (\$Bln) | 621 | 793 | 787 | 762 | 830 |
| Growth YOY | 23% | 28% | - | - 3.6% | 9% |
| Containers (TEUs'000) | 9388 | 9894 | 9980 | 11548 | 12703 |
| Growth YOY | 15% | 5.4% | - | 11% | 5% |

Container Volume 2015-16 (F) – 15 million TEUs
Trade Value \$1.0 Trillion



India-Trade Profile

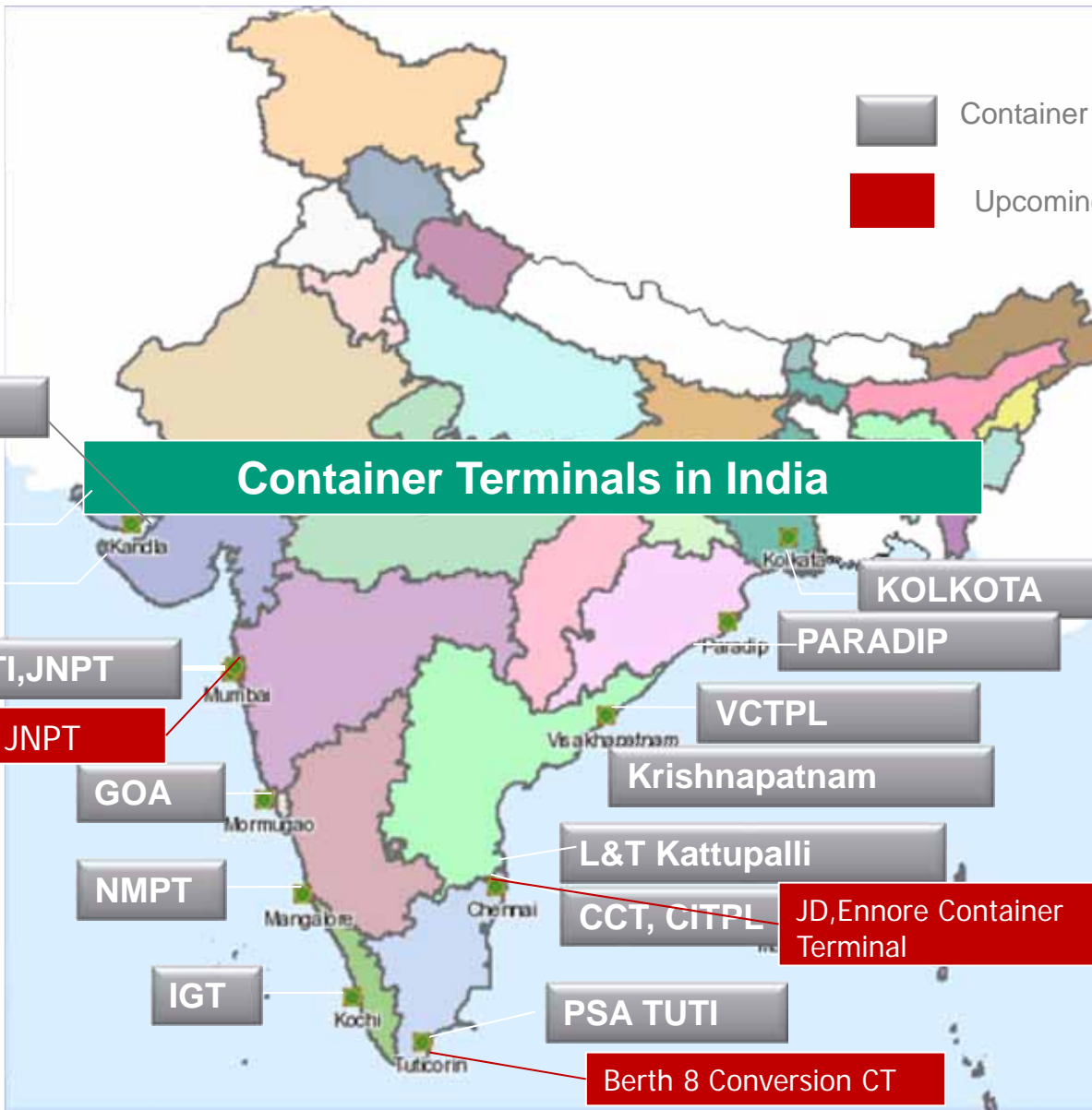
| Year | Mainline % | Feeder % |
|----------|------------|----------|
| 1990 | 10 | 90 |
| 2000 | 20 | 80 |
| 2005 | 30 | 70 |
| 2012 | 40 | 60 |
| 2015 (P) | 55 | 45 |



Indian Port Capacity

| Year | Major Port | Non - Major port | Total |
|--------------|------------|------------------|-------|
| 2011 - 2012 | 703 | 544 | 1,247 |
| 2019-2020(e) | 1,215 | 1,270 | 2,485 |

Million tonnes(MT)



Terminals: 20
Equipment : Quay Cranes : , RTGs : 160
Civil : Yard - 43,000 TGS, Quay – 10,000 m



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Tamil Nadu's Industrial Growth

1. Chennai **EXIM TRADE: Annually Rs 3,00,000 Crore(50 Bn \$)**
2. 2nd fastest growing states & Top 3 FDI destinations in India- **INR 60,000 Crore (10 Bn USD)**– last 4 years
3. **Chennai : “Detroit of Asia”** - World's Top 10 auto clusters- INR 40,000 Crore(6 bn USD) + INR 35,000(5 bn USD) crore in pipe line
4. **Infrastructure Projects** : Metro rail , Port 's and Airport's expansion- INR 35,000 Crore(5 bn USD)



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Investors preferred destination

JUNE 2006 – DEC 2013
15 BILLION USD



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Industries in & around Chennai

Chennai: The Hi-Tech Industrial Ecosystem

► Automobile & Auto Components



DAIMLER



HYUNDAI



BOSCH



MRF
TYRES
Tyres with Muscle

CATERPILLAR®



KOMATSU

ASAHI GLASS



APOLLO TYRES LTD





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Industries in & around Chennai

Chennai: The Hi-Tech Industrial Ecosystem

▶ Electronic Hardware



Honeywell

NOKIA
Connecting People



FOXCONN®



PERLOS

FLEXTRONICS

SIEMENS



mouserbaer
REWRITING THE FUTURE



Panasonic



Salecomp
POWERING THE MOBILE WORLD

▶ Information Technology

ORACLE®



Infosys®

HCL



accenture
High performance. Delivered.



HSBC
The world's local bank



Sify



i|nautix.
technologies inc



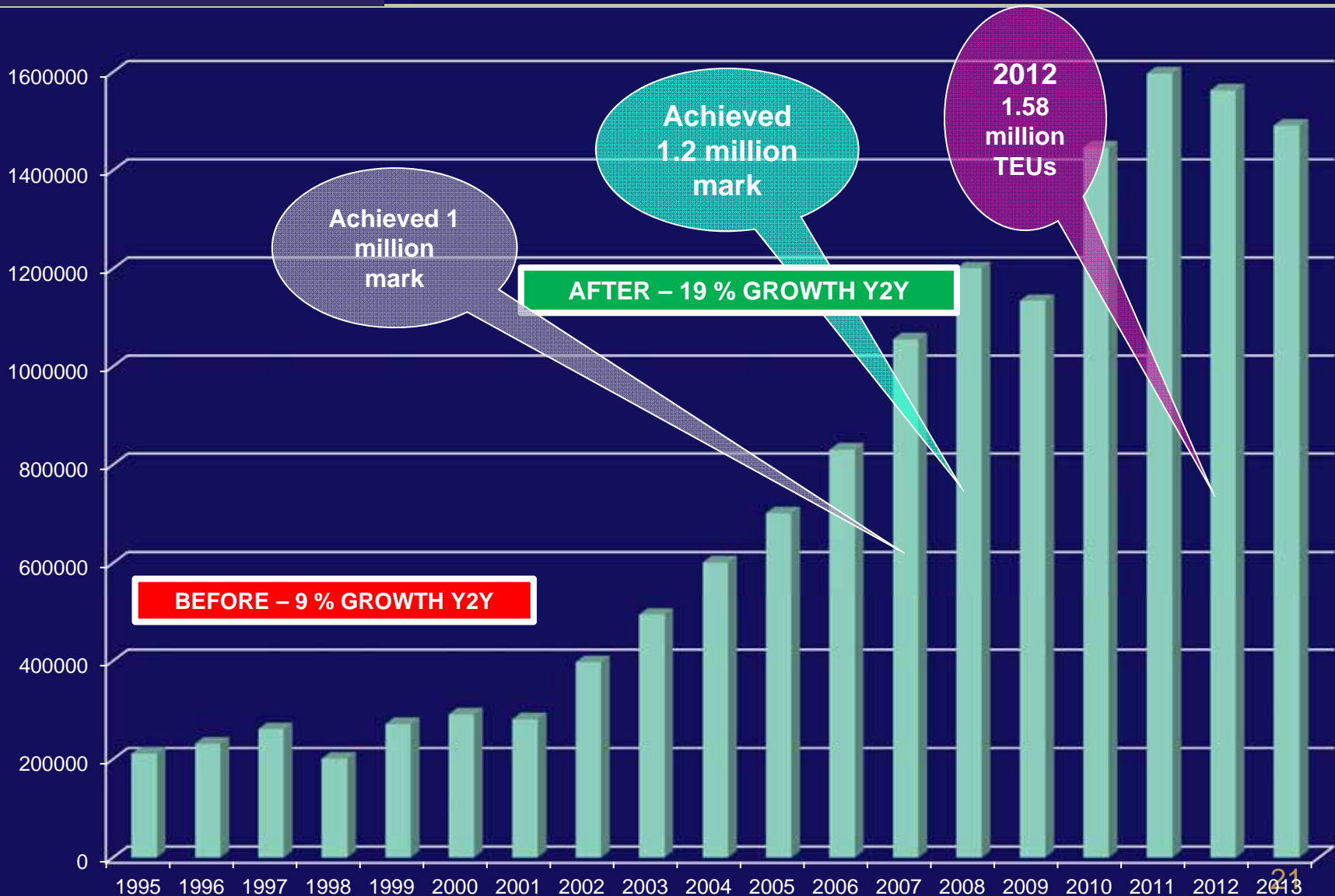
IBM

citibank

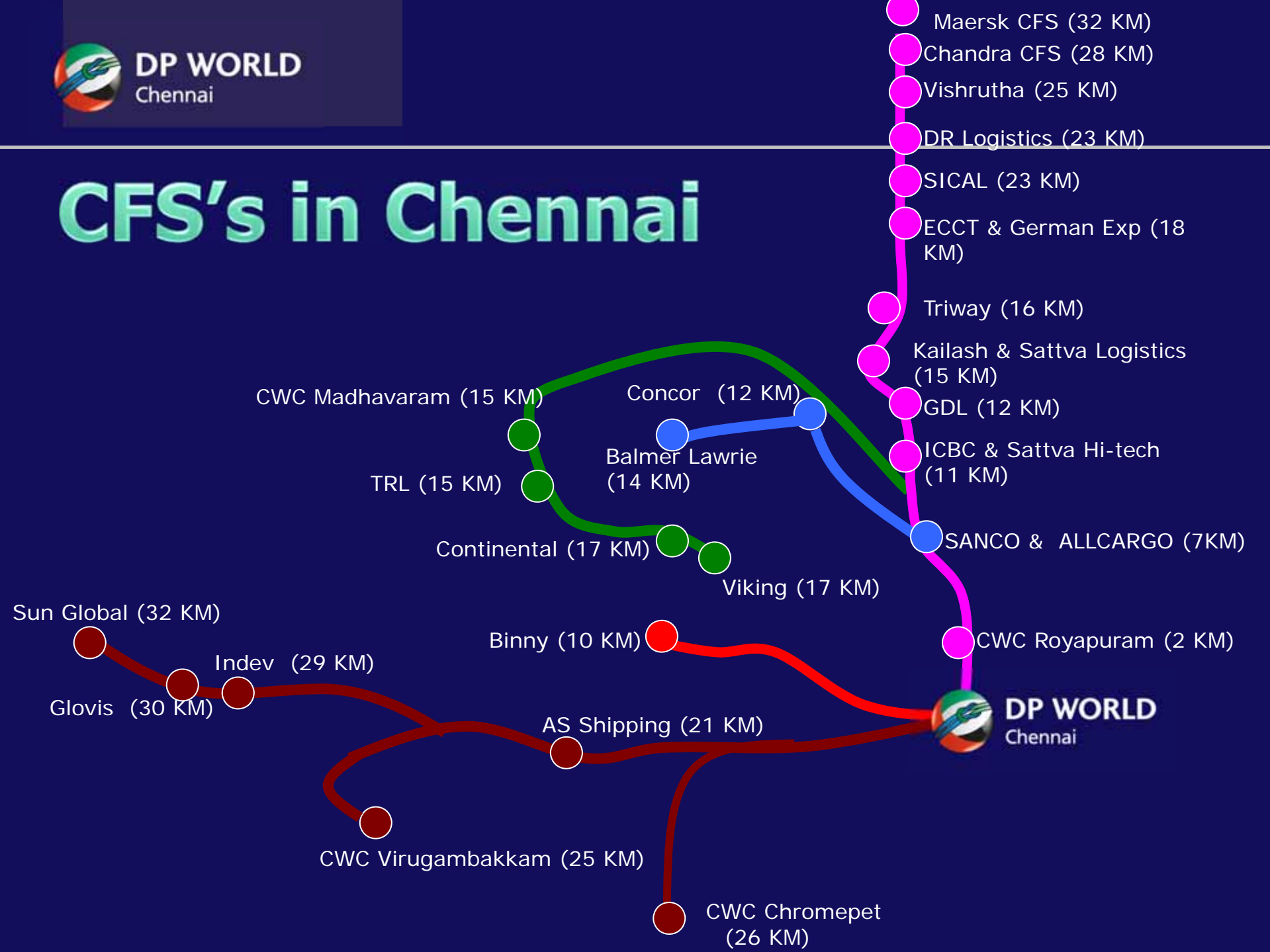




Chennai Growth 1995 - 2013



CFS's in Chennai





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Quay Infrastructure:

Quay Length – 885 m

Draft – 13.4 m

Quay Cranes : 8
(5 Mono + 3 Twin)

Yard Infrastructure:

RTGs - 22 ; ECH - 1

3960 Ground Slots

500 Reefer Points





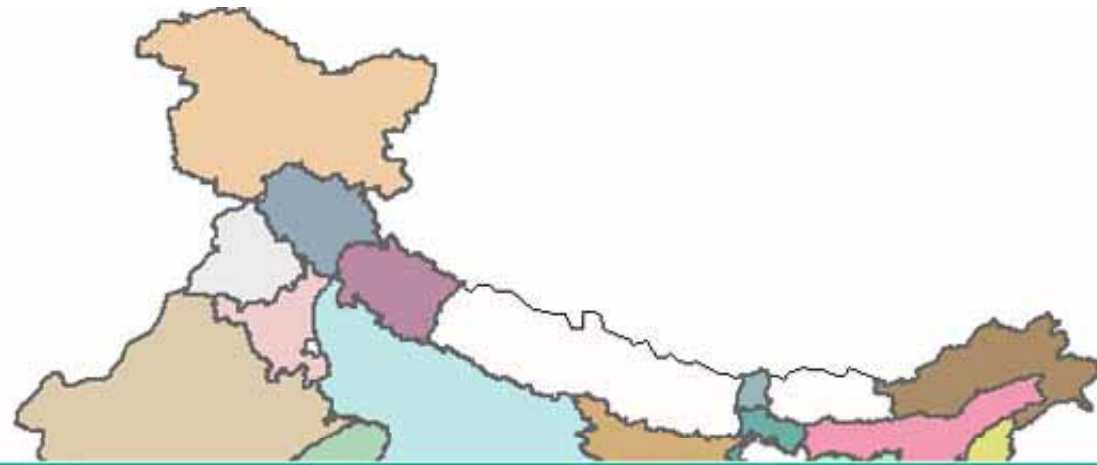
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World Class Performance-2014



World Class Performance 2500 moves within
18 hours. **125 moves per hour on Vessel**

Chennai Container Terminal Prior 2001



Chennai was Connected with 5 Ports

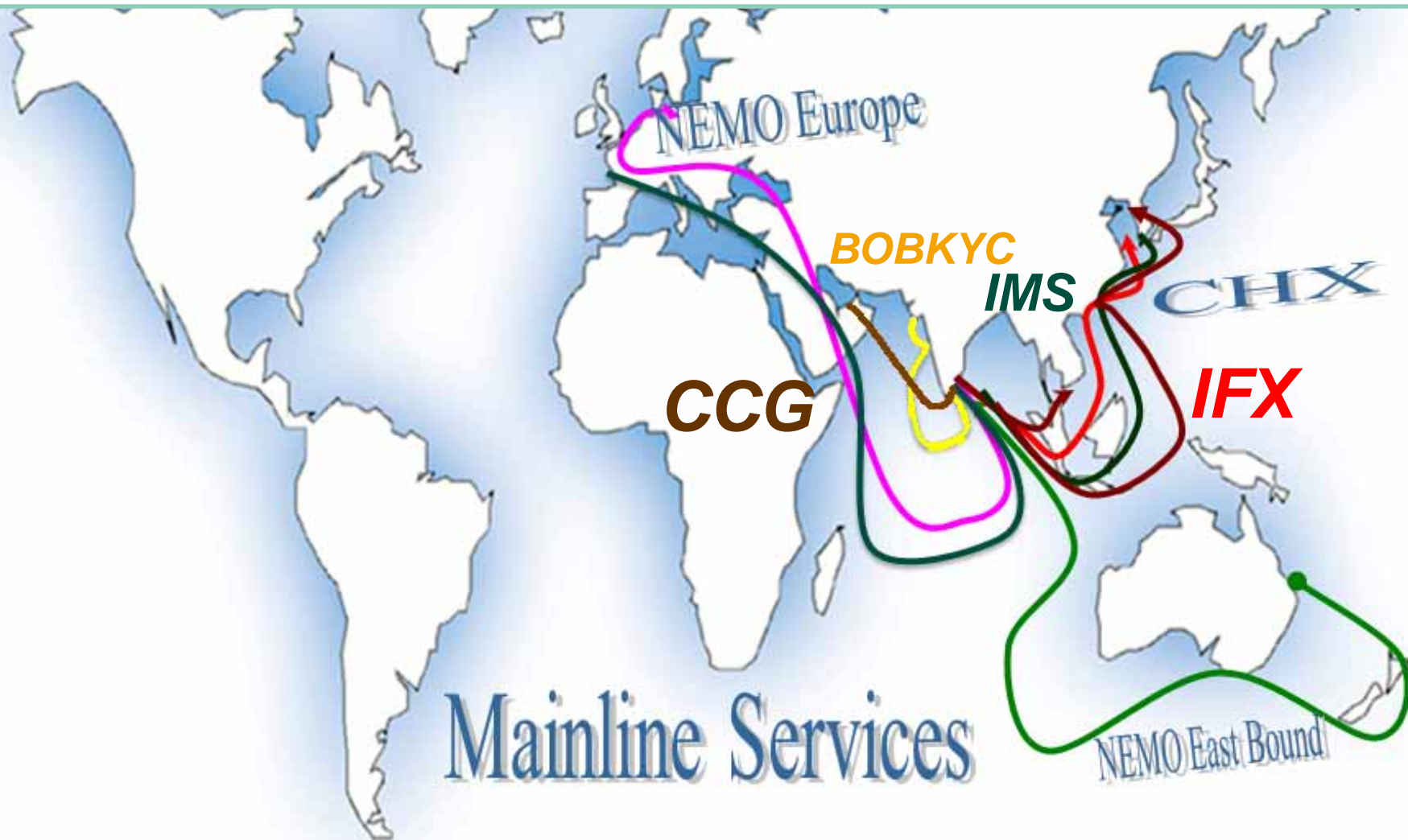




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Chennai Container Terminal - 2014

2014 - Connected to 60+ ports globally!



DP World Chennai India's first “e-Terminal”



The Hon'ble Union Minister of Shipping, declared DP World Chennai as India's first e-terminal

- *e- Form13* :Web based forms allocation to VOA, COA, CHA and CFS to receive/deliver containers.
- *e- SSR* : Allow containers arriving after cut-off time.
- *e- CRM* : Used by all our external customers to log calls.
- *e- Invoice*: To View/download invoices by customers .
- *e- Web Access* :VOA, COA and CFS pre-advise containers.
- *e- SMS* : SMS based container Tracking.
- *e-Container Search* : On line Container Tracking.
- **e-payment to Vendors** : paperless transaction



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Union Shipping -

Minister Visit on 3rd Nov 2014





1st Container Terminal in India

- **IMO mandates – Weighment of all containers by July 2016**
- **22 RTGs -Load Cell unit fixed- DP World Chennai ready now**
- **Certified by **Weight & Measures** with tolerance +/- 0.5 tons**
- **Improve Safety & Prevent Revenue Loss**
- **All Containers can be weighed**

- 2014: **Best Container Terminal Operator** conferred by EXIM India
- 2013: **EXIM Achievement Award** by Tamil Chamber of Commerce
- 2012: **Sir Visvesvaraya Industrial Award** by AIMO
- 2012: **Best Container Terminal Operator** conferred by EXIM India
- 2012: **EXIM Achievement Award** by Tamil Chamber of Commerce
- 2011: **Best Container Terminal Operator** conferred by EXIM India
- 2010: **DP World Global award for Excellence in Safety and Environment**
- 2010: **Lloyds List ME and ISC Award for Terminal Operator of the Year**
- 2010: **National Safety Award – Vishwakarma Rashtriya Puraskar**
- 2010: **Maritime Gateway awards for Terminal Operator of the Year**
- 2010: **EXIM South East India Awards Terminal Operator of the Year**
- 2009: **Best Container Terminal Operator** conferred by EXIM India
- 2008: **Exim Achievement Award** by Tamil Chamber of commerce
- 2007: **Best Customer Award** from Hyundai Motors India Ltd



CCT - Then & Now



| Indicators | Then (2001) | Now (2013) |
|------------------------|-------------------|-------------------|
| Berth waiting time | 3 days | 0 |
| Vessel Turnaround time | 72 hours | 19 hours |
| Import Dwell Days | 7 Days | 22 Hours |
| Crane Productivity | 10 moves per hour | 30 moves per hour |





Container Average Productivity:

- **Terminal : 2 mts / Box**
- **Port Gate : 8 mts/Trailer**
- **On Road : 24 hours/Trip**

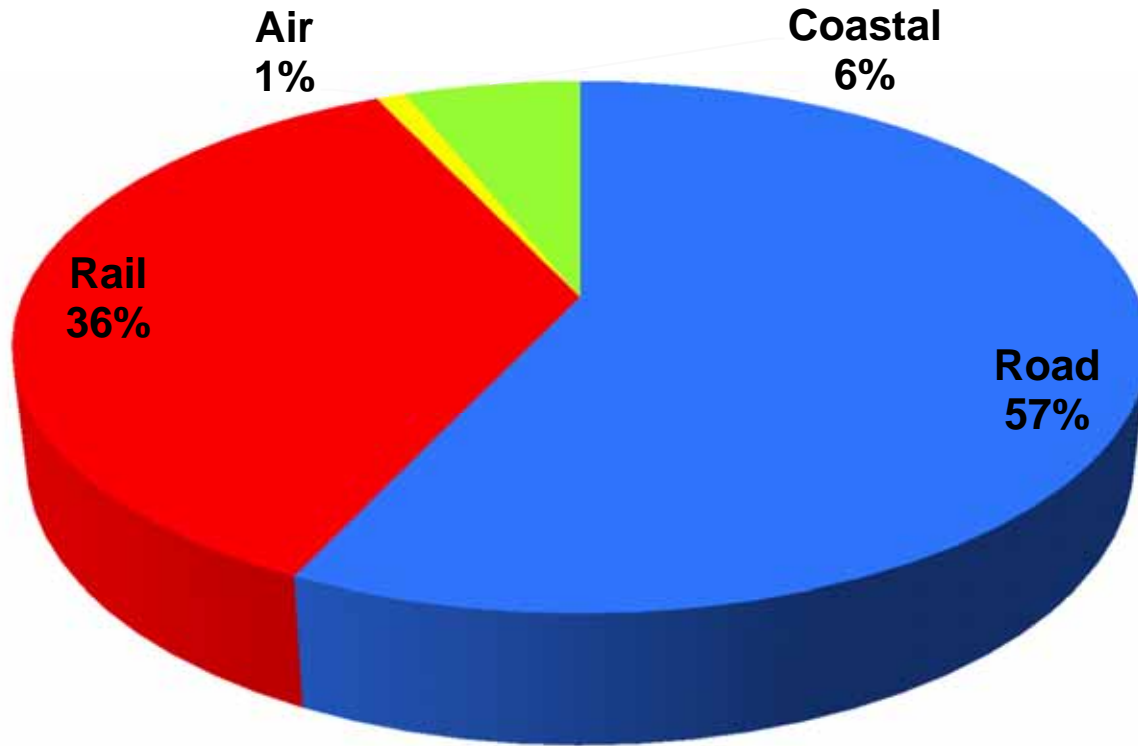


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Future India- Coastal Shipping?



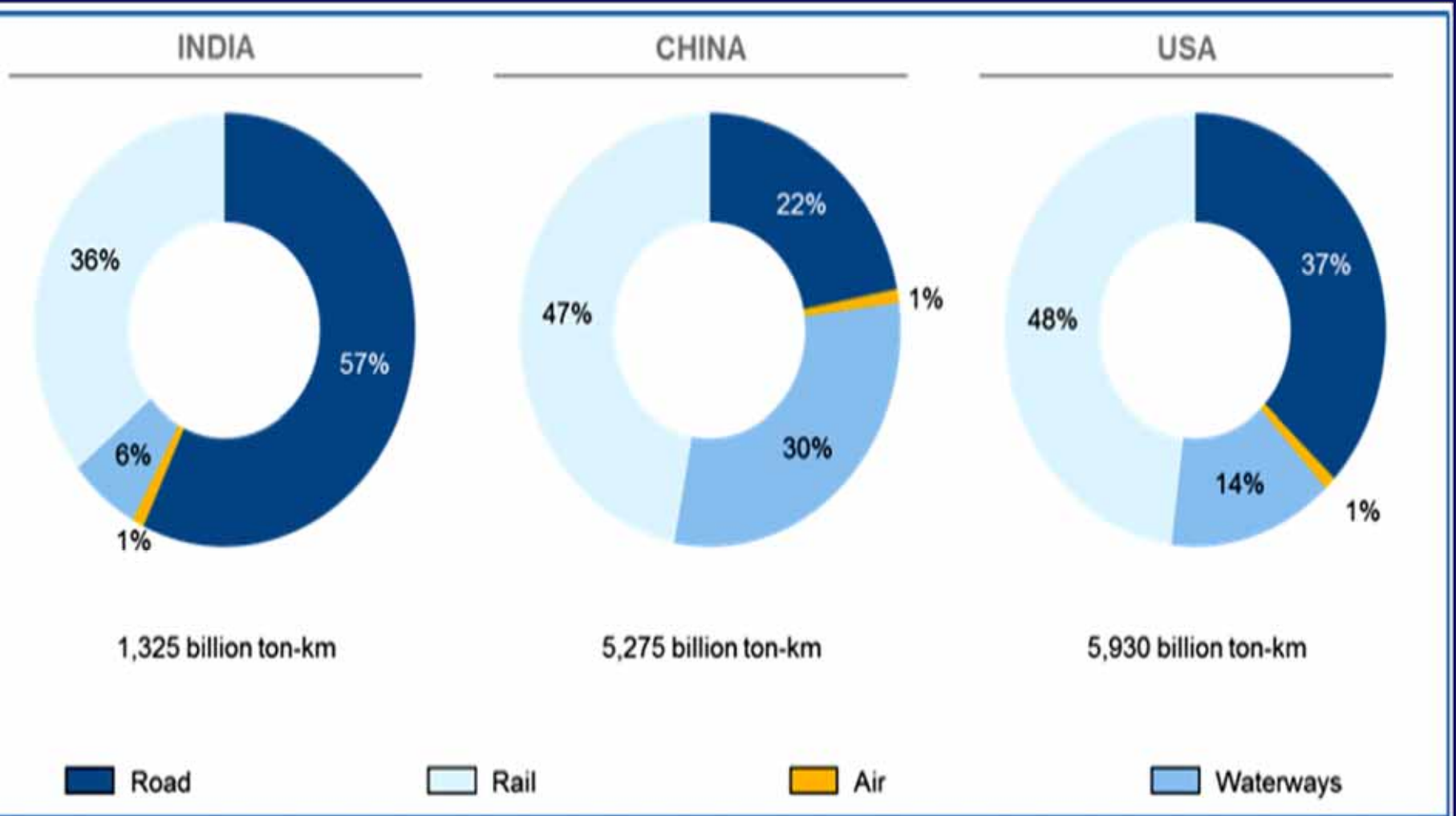
India Transportation Mode %



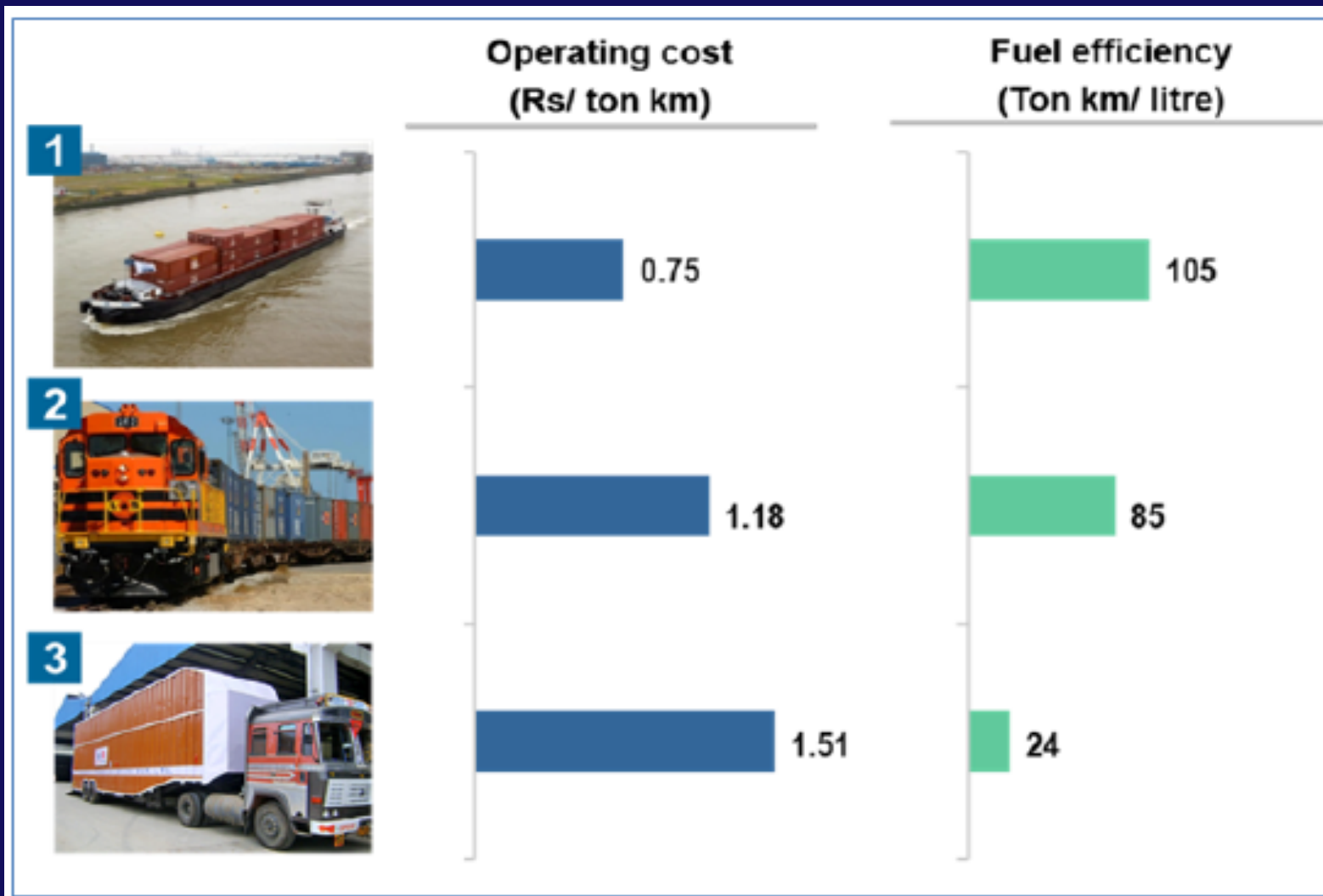
| Mode | Road | Rail | Air | Coastal | Pipeline |
|------|------|------|-----|---------|----------|
| % | 57 | 30 | 1 | 6 | 6 |

Globe Vs India

Compelling case modal shift freight from Road & Rail to waterways.



India- Operating Cost





Unit Cost of Transportation

- **Coastal** : **1**
- **Rail** : **2**
- **Road** : **5**
- **Air** : **15**



INDIAN COASTAL - "Sagar Mala"



Coastal-2013

| | China | India |
|---------|----------------|-------------|
| Volume | 1 Billion Tons | 150 mn Tons |
| Ships | 12000 | 140 |
| Coastal | 30% | 7% |



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GOI Incentive for Coastal

Bulk & General Cargo:

50 paisa/ton/nautical mile

Container:

THC: Rs 1000/TEU

VRC: 20% REDUCTION

| | | |
|---|-----------------------------|-------------|
| 1 | Last Mile Road Connectivity | ✓ |
| 2 | Inland Water Ways | On Progress |
| 3 | Coastal Shipping | ✓ |
| 4 | Rail Connectivity | On Progress |
| 5 | Market driven Tariff | On Progress |



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Thank you