



Royaume du Maroc



3<sup>rd</sup> MED Ports Conference

## Continued Growth in Port Activities for the Mediterranean Region

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Tanger Med1 Port Director

Thursday, 26 in Casablanca  
at the Sheraton Hotel

TANGER MED  
PORT AUTHORITY



The background image shows a large port terminal. A white gantry crane is in the process of lifting a blue container. Below the crane, there are stacks of various colored containers (blue, red, green, orange). The structure of the terminal is made of white metal beams. In the distance, a hillside with some buildings is visible under a clear sky.

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## TANGER MED – A NATIONAL WILL

### Port and Free Zones

**Born from a political will**

**Mobilize the strengths of the Kingdom**

**Provide a port hub of industry and services**

**Key dates:**

**Launched on July 30<sup>th</sup>, 2002 by His Majesty Mohammed VI**

**2007: Start 1st Container terminal APMTT;**

**2008: Start 2<sup>nd</sup> Container terminal Eurogate;**

**2010: Start of the Passenger Truck Terminal;**

**2011: Start of the Multi Rail connection**

**2012: Start of Hydrocarbons and Cars terminal**

**2012: Start of the Renault Nissan Factory and Exports**

**2014: Start of Tanger Med Port Center**



## TANGER MED – A UNIQUE LOCATION

Zero deviation on East-West / North-South routes

100 000 ships annually passing by the Strait of Gibraltar

20% of which is container traffic



# TANGER MED SPECIAL AGENCY

PORT & FREE ZONES : Over 3000 hectares



# TANGER MED GROUP



Telecom & Engineering



1000 hectares  
35 Mil tons / year  
6000 Jobs



2000 hectares  
400 Companies  
60.000 Jobs  
3 Bil \$ Exports



# TANGER MED – A MEGA PORT

## TANGER MED PORT COMPLEX A WORLD CLASS PLATFORM



- **8 Mil Container TEUs annual handling capacity**
- **500.000 vehicles per year**
- **7 Mil passengers**
- **700 000 trucks**
- **5 Mil tons of Oil products**
- **End to end length: 9 km**
- **8 billion \$ public/private investment**

# BUSINESS PARTNERS - A MAJOR ASSET OF TANGER MED PORT



RENAULT





## TANGER MED I – A PORT FOR CONTAINERS

ACTUAL WORLD RANKING : 55<sup>th</sup> ( base 2013)



Operational since 7 years

Terminal 1 – APM Terminal Tangiers

Terminal 2 – Eurogate Tanger

Private Investment : 350 Mil \$

The two terminals exceeded their maximum capacity and reached 3.080.000 TEU in 2014 ( +20% Vs. 2013)

Standard world class productivity since 2008

# TANGER MED I – A PORT FOR VEHICLES



- 500.000 Cars Capacity / year
- Export of new manufactured cars in Morocco ( 193.000 cars in 2014)
- Transshipment: More than 40.000 cars handled
- Main export Market: Europe
- Ranking Morocco 1<sup>st</sup> exporting country of new cars in Africa

# TANGER MED I – A PORT FOR HYDROCARBONS



- 12 Ha / 500 000 m<sup>3</sup> of storage capacity
- 3 main activities: Bunkering + Transshipment + Import of refined products
- Tons realized in 2014 : 4 Mil

## TANGER MED I – SOLID BULK Terminal

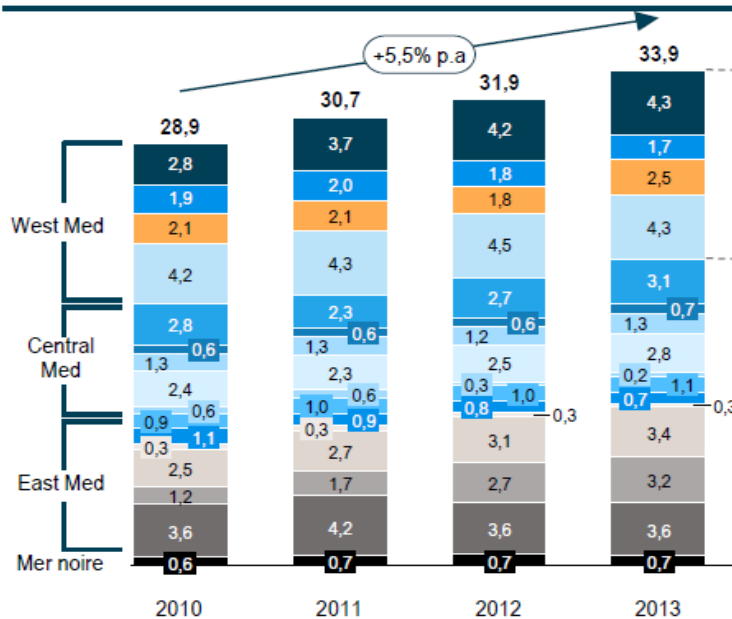


- **Coil import : registered an important growth in 2014**
- **High demand from Renault – Nissan Tanger factory whose production has increased over the last two years**
- **Import Market: Spain**

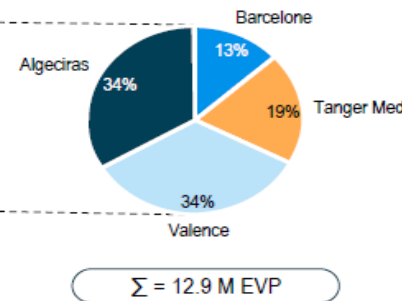
# Tanger Med Position in the Mediterranean Region

- In 2013, Tanger Med transshipment traffic represented 19% of the total transshipment traffic of the West Med region.
- Between 2010 and 2013, Tanger Med Transshipment traffic has increased by 6.7% exceeding the increase registered by Valencia and Barcelona over the same period.

Flux de transbordement de conteneurs en Méditerranée [M EVP ; 2010 - 2013]



Trafic de transbordement de conteneurs en Méditerranée occidentale [%; 2013]

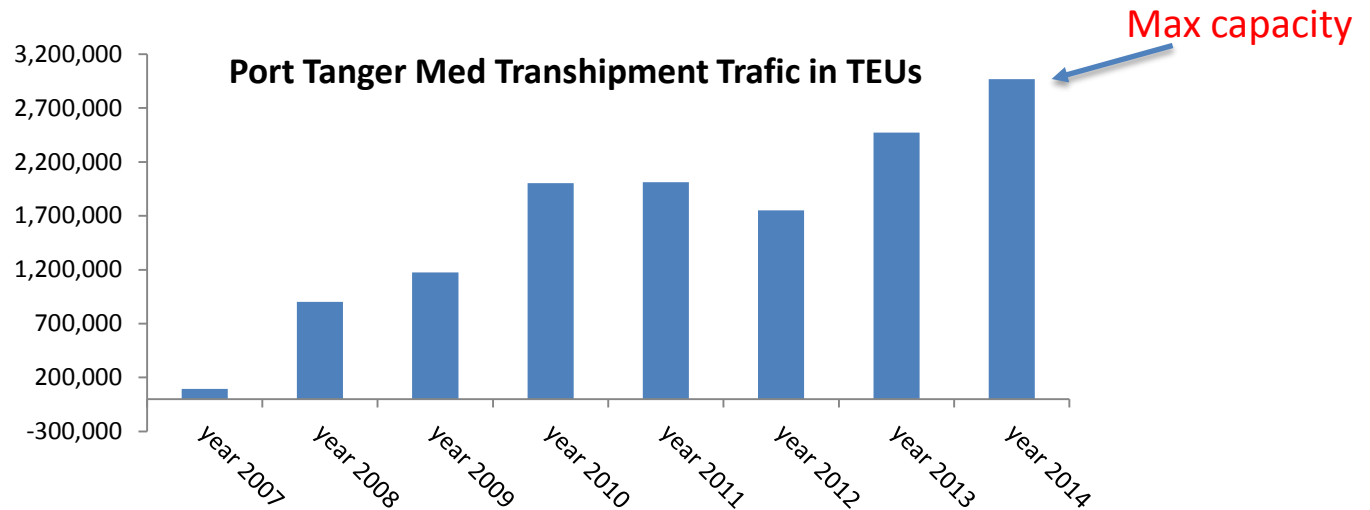


TCAM [% ; 2010 - 2013]

ALGECIRAS	15,6%	↔
BARCELONA	-3,8%	↔
TANGER MED	6,7%	↗
VALENCIA	0,9%	↔
GIOIA TAURO	3,2%	↗
CAGLIARI	8,0%	↗
LA SPEZIA	0,4%	↗
MARSAXLOKK	5,1%	↗
TARANTO	-30,3%	↘
BEIRUT	5,6%	↗
DAMIETTA	-11,3%	↘
LIMASSOL	-7,8%	↘
AMBARLI	10,0%	↗
PIRAEUS	38,2%	↗
PORT SAID	0,1%	↗
CONSTANZA	5,9%	↗

# Tranger Med : A must Transhipment Hub in the West Med

- Tanger Med is one of the important transhipment hub in the Western Med region
- Transhipment traffic has increased over the last 7 years to reach **2.8 Mil Teus** in 2014.
- Transhipment traffic has increased by 20% in 2014 and 40% in 2013



## Mediterranean Region trend

### Taux de croissance du trafic de transbordement de conteneurs (2013)

Tanger Med	40%
Pirée	19%
Gioia Tauro	14%
Ambaril	12%
Port Said East	9%
Marsaxlokk	9%
Algéciras	5%

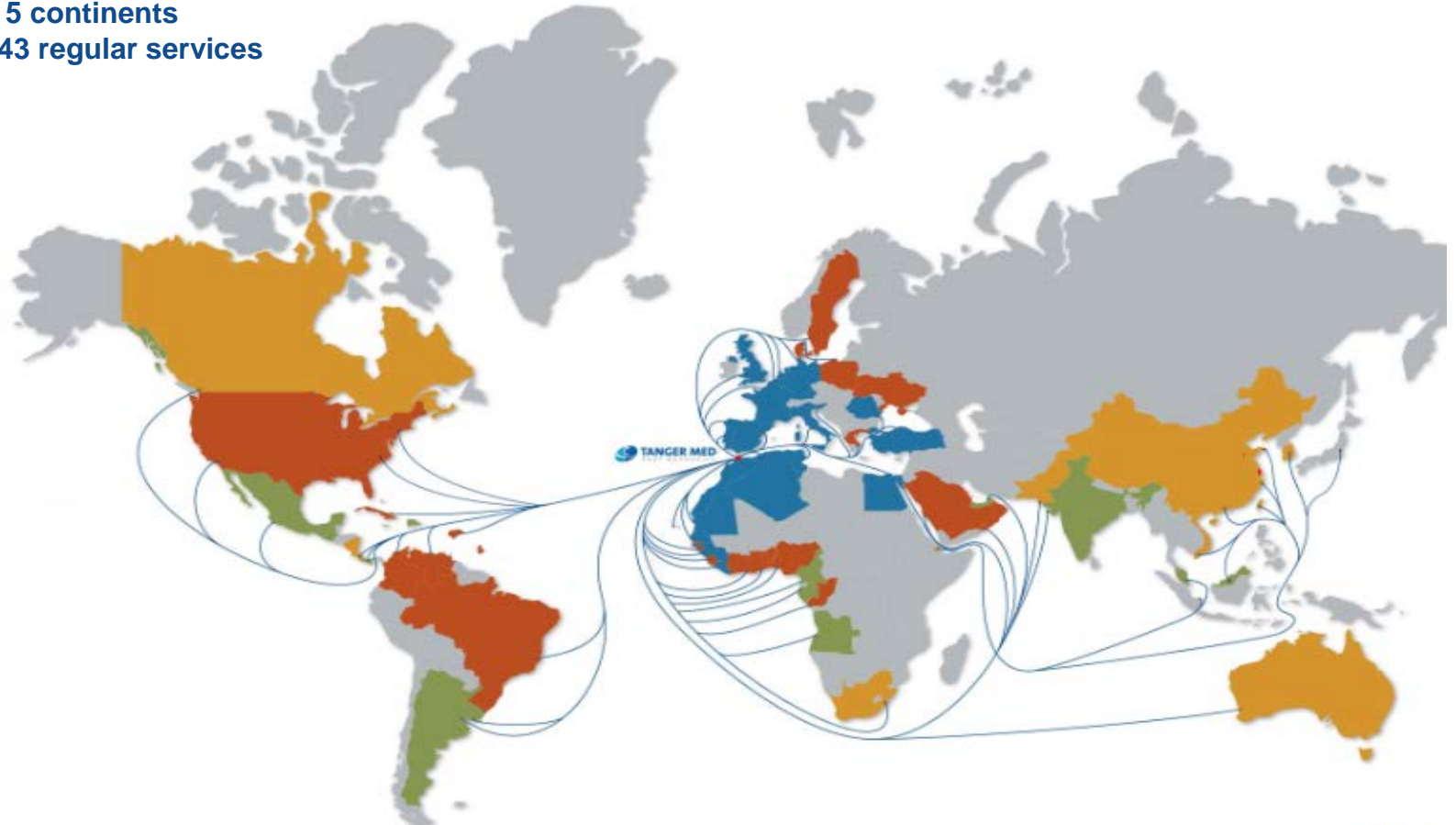
# ZOOM on the Western Mediterranean Traffic growth forecast : 2034 Région Horizon

- **Basic Scenario → Average annual growth rate of 2,05% ( 2014-2034)**
  - ▶ Shipping lines will continue to deploy more services to West Africa (infrastructure available + vessel size continues to row)
  - ▶ Competitiveness between the transshipment hubs located in the Strait with the ones in South Africa and in near future with the transshipment hub located in Southern Africa.
  - ▶ Small growth in the transshipment traffic between 2012 and 2013 ( avg growth of 2,1%)
- **Optmistic Scenario: → Average annual growth between 2014- 2034 of 4%**
- **Pessimistic Scenario: → Average annual growth between 2014- 2034 of 0%**

		2013	2014	2015	2016	2017	2018	2019	2020
<i>En MEVP</i>									
<b>Traffic forecast Western Med hubs</b>	<i>Scénario 2%</i>	15,1	15,6	16,1	16,5	17,0	17,5	18,0	18,4
	<i>Scénario à 4%</i>	15,1	15,7	16,4	17,2	17,9	18,7	19,5	20,3
	<i>Scénario 0%</i>	15,1	15,5	15,3	15,5	15,17	16,0	16,1	16,3

# Containers: a unique geostrategic location

- 160 ports
- 60 countries
- 5 continents
- 43 regular services

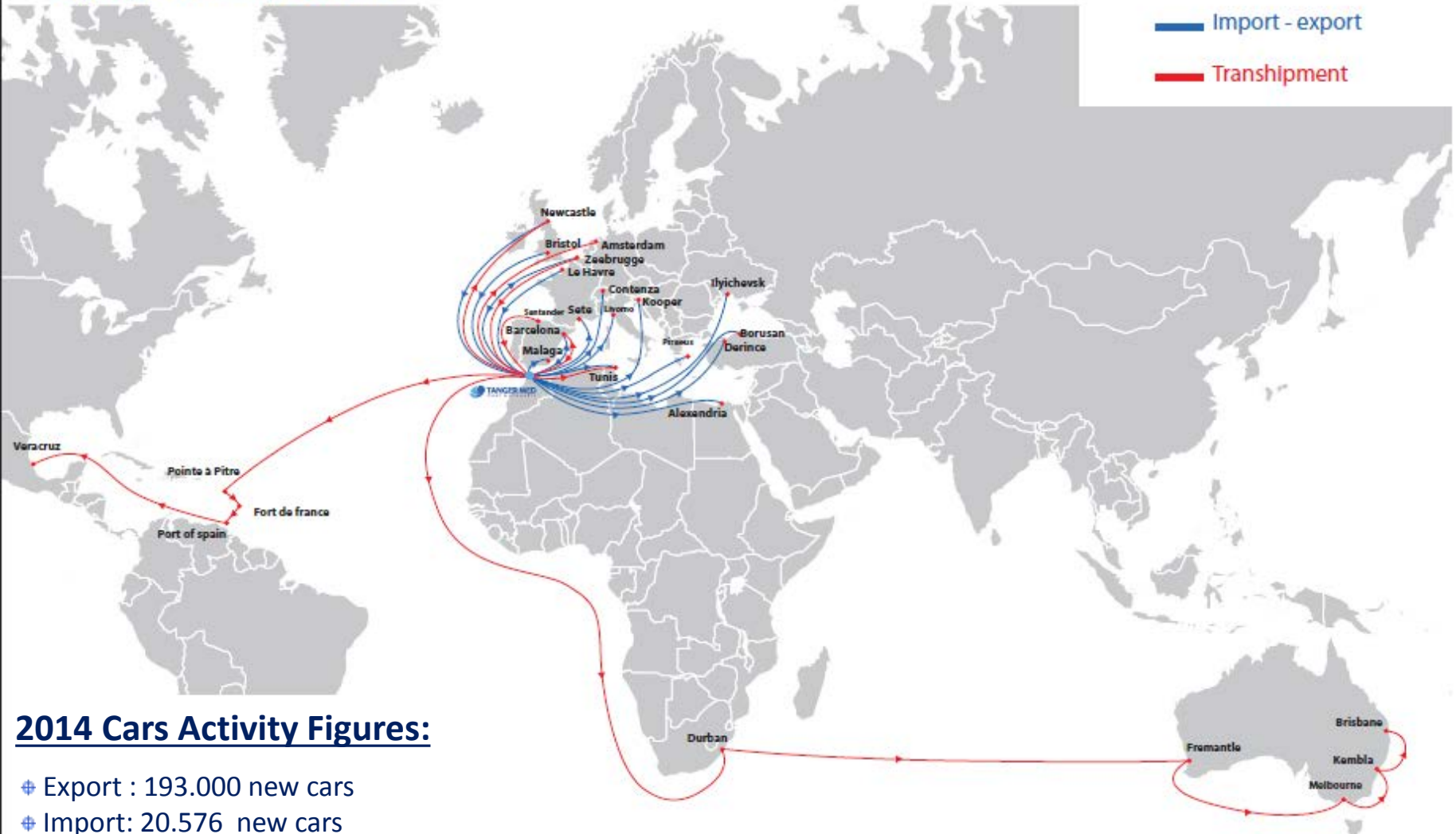




# Car Carriers : Reaching New Markets

## PORT TANGER MED, CAR CARRIER CONNECTIONS

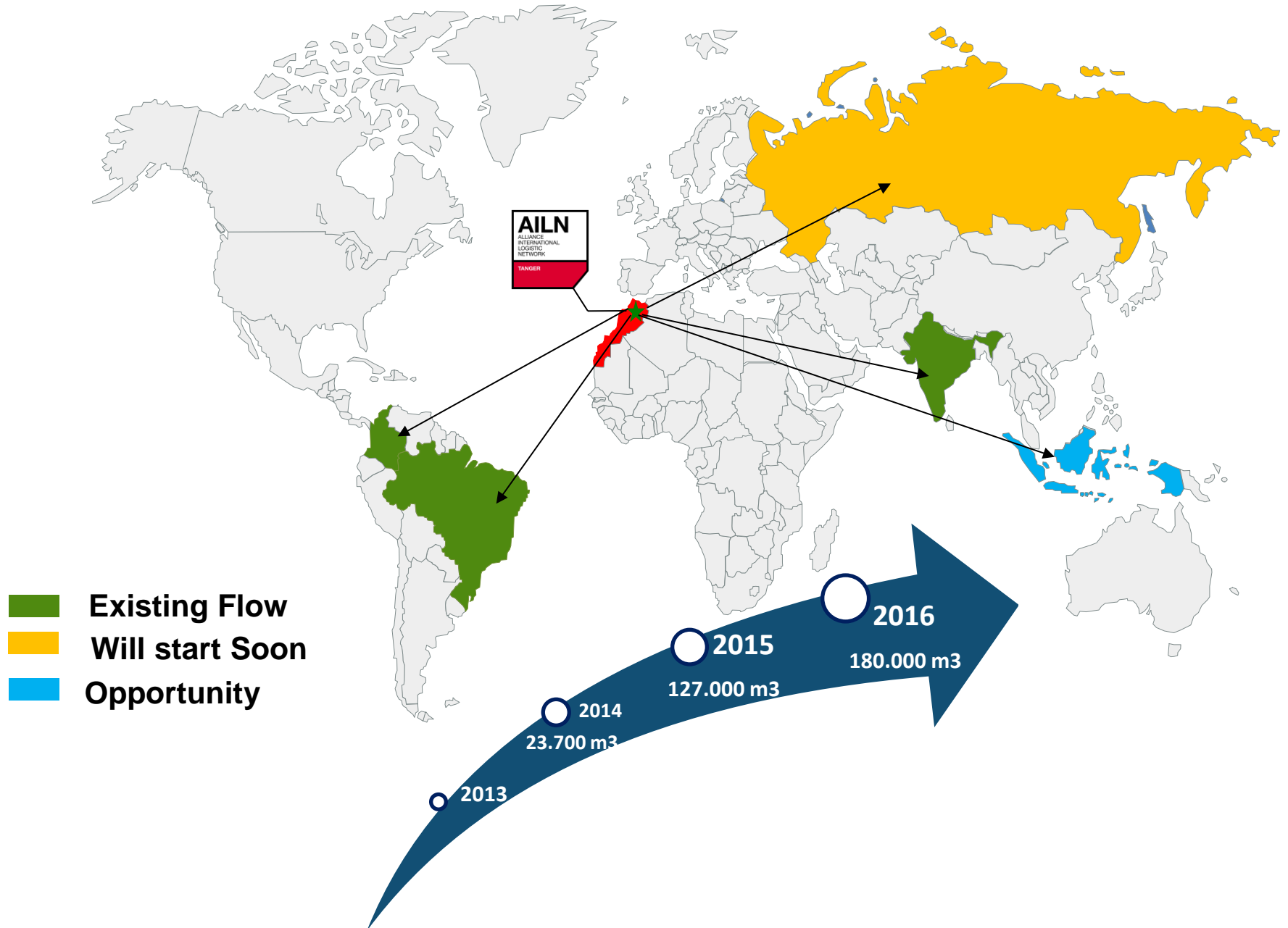
27 ports, 19 countries, 4 continents



## 2014 Cars Activity Figures:

- ✦ Export : 193.000 new cars
- ✦ Import: 20.576 new cars
- ✦ Transshipment: More than 40.000 cars handled

# Renault-Nissan Tanger : International Logistic Network



## INDUSTRIAL ZONES, LOGISTICS AND COMMERCIAL



### LOGISTICAL AND INDUSTRIEL PLATFORM ON THE NORTH OF MOROCCO

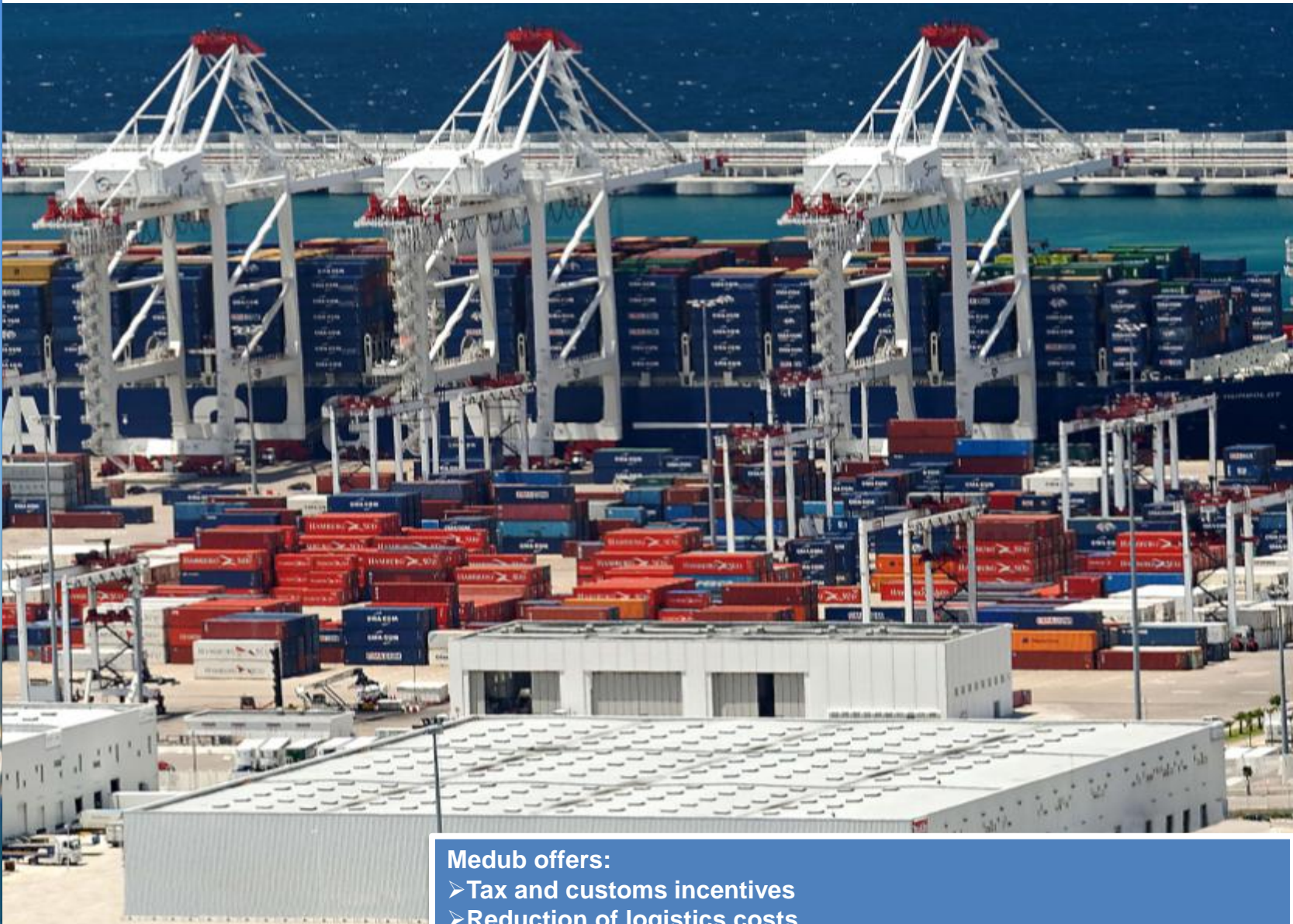
**New free zones activities**  
**New automotive hub**  
**60 000 jobs created**  
**Over 2,6 billion euros per year exported**  
**Extra 50 km railway and highway connecting**  
**Tanger Med to the rest of Morocco**



# Automotive industry and steel services



**MORE THAN  
25 ASSEMBLY PLANTS  
(4 MILLION VEHICLES PRODUCED)  
IN LESS THAN 48 HOURS**



**Medub offers:**

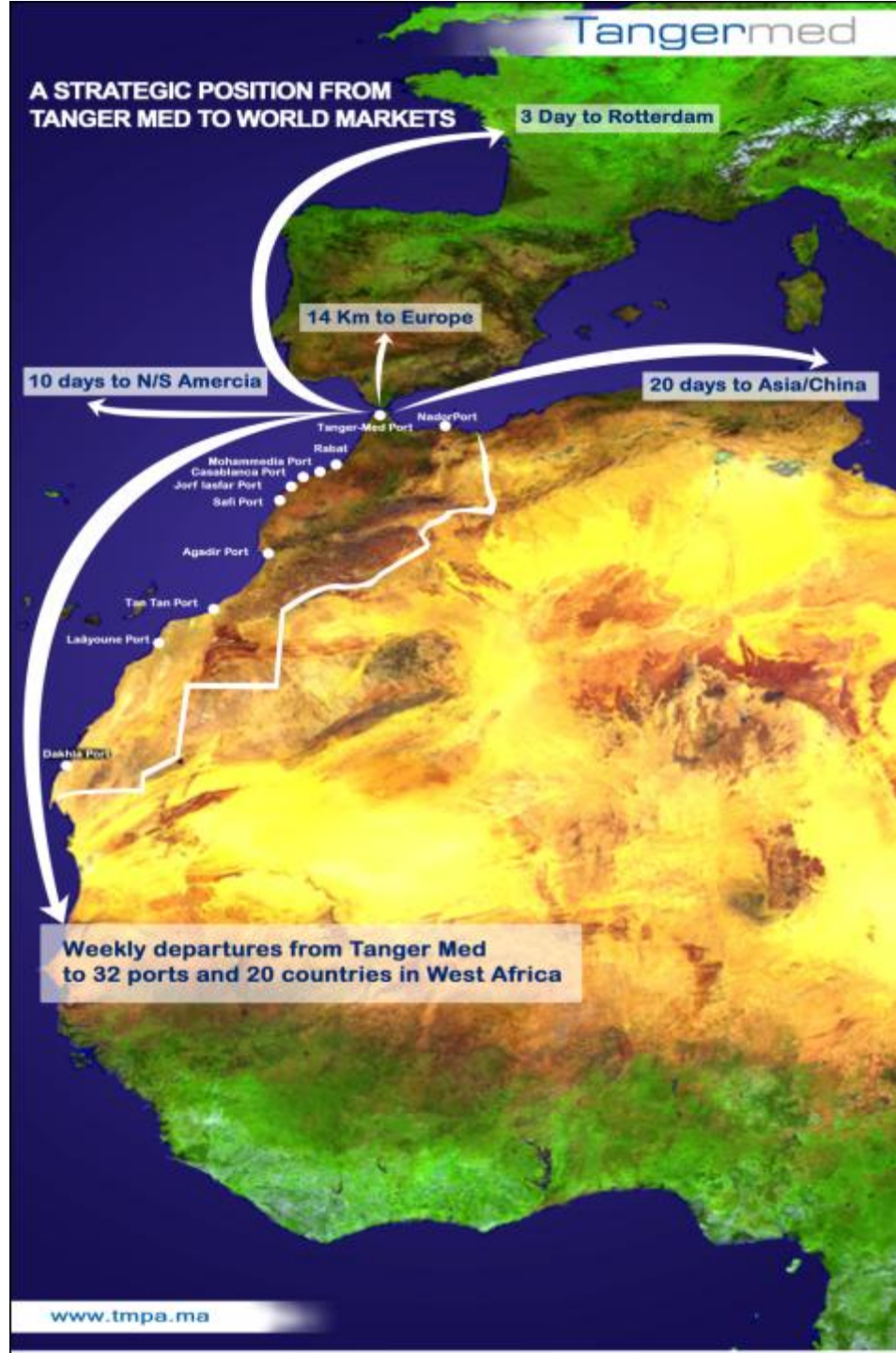
- Tax and customs incentives
- Reduction of logistics costs
- Immediate proximity to the port Tanger Med for your exchanges
- A large commercial supply of offices land and warehouses



- 400 hectares
- 400 companies located
- More than 60 000 jobs
- Multipurpose area export oriented: Equipment Automotive, Aerospace, Textile ...
- Over 3 billion \$ Turnover Exported

## TANGER MED – 2013-2014 RANKING

- 2014:
  - 1<sup>st</sup> Port in Africa and Latin America
  - 16<sup>th</sup> port in terms of world maritime connectivity index
- 2013:
  - 7<sup>th</sup> in the Mediterranean
  - 55<sup>st</sup> largest port in the world in terms of container traffic
- Other:
  - First Truck, Cars and passenger Port in Morocco
  - First in exporting new manufactured cars to Europe



## TANGER MED – IN SUMMARY...

### The Tanger Med Value Proposition:

- **A world class, multi-purpose Port with excellent World/World connectivity**
- **A highly efficient Gateway to/from Morocco's hinterland**
- **A unique geostrategic location on the Mediterranean bridging Europe and Africa, and allowing easy access to a market of 600+ million people**
- **A vast array of activity zones sharing the free trade zone status with the Port**
- **Competitive advantages:**
  - ✓ **Skilled labour**
  - ✓ **Tax incentives**
  - ✓ **One-stop shop**
  - ✓ **Free Trade Agreements**





# CONTINUES OPPORTUNITIES



1000 hectares  
35 Mil tons / year  
6000 Jobs

2000 hectares  
400 Compagnies  
60.000 Jobs



New Terminals  
100 Mil tons / year

5000 hectares  
800 Compagnies  
150.000 Jobs

FUTURE



Royaume du Maroc



[www.tmpa.ma](http://www.tmpa.ma)

<http://www.tangerfreezone.com>

[www.tangermed-passagers.com](http://www.tangermed-passagers.com)