

Port of Colombo



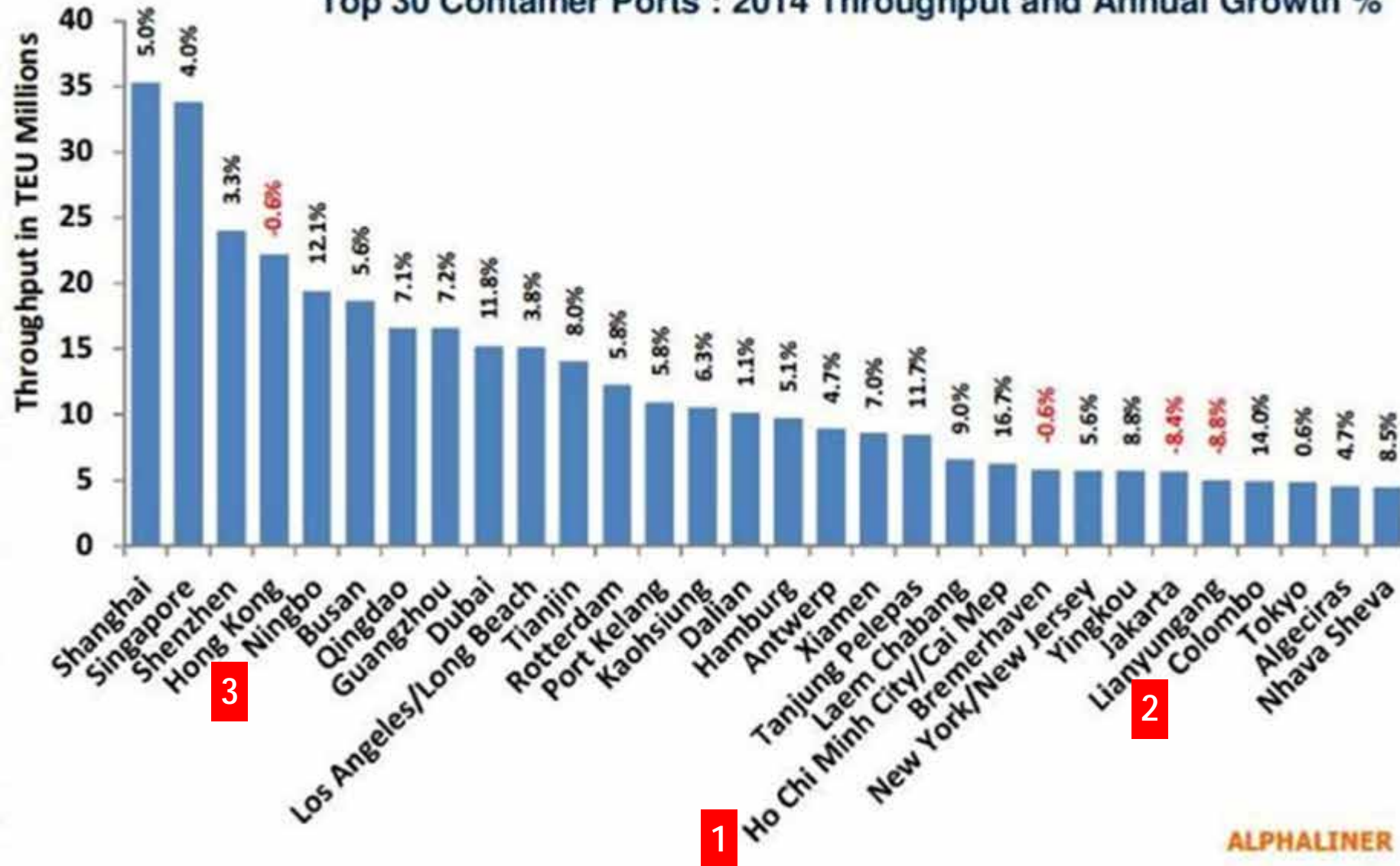
MARITIME MEGA HUB OF SOUTH ASIA

Port of Colombo Perspective

- 2nd biggest YOY growth by % in top 30 ports
- Ranked # 28 in the world
- 4.9m Teu in 2014 with 80% transshipment
- Existing capacity of 7m plus Teu
- The only deep draft (-18m) facility in South Asia
- Additional deep draft (-18m) capacity pipeline (ECT & WCT)
- Potential to increase capacity to over 10m Teu
- Proof of concept efficiency of average 32-34 mph/crane

Top 30 Ports

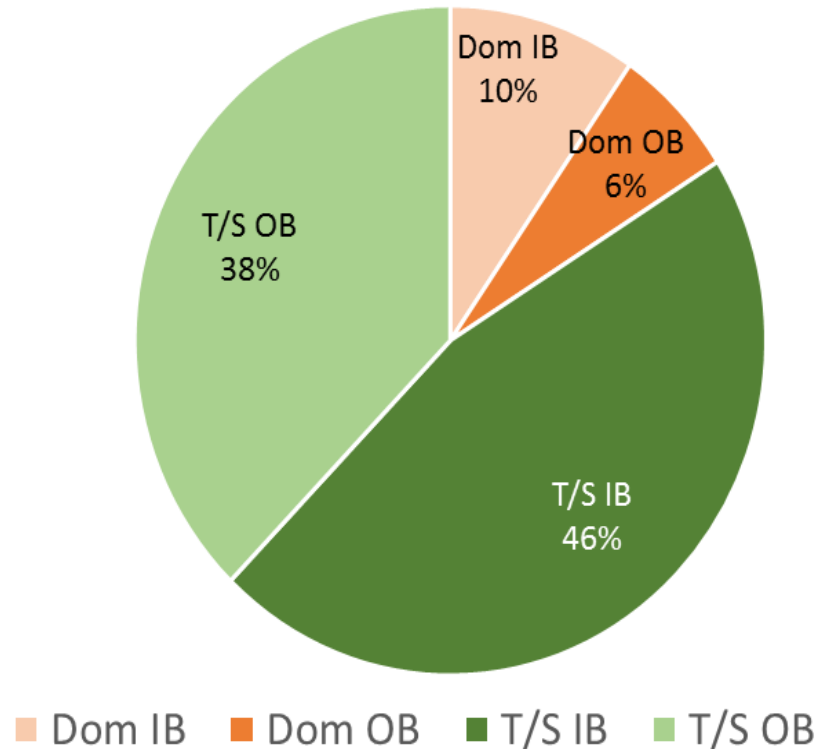
Top 30 Container Ports : 2014 Throughput and Annual Growth %



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Port of Colombo – The India connection

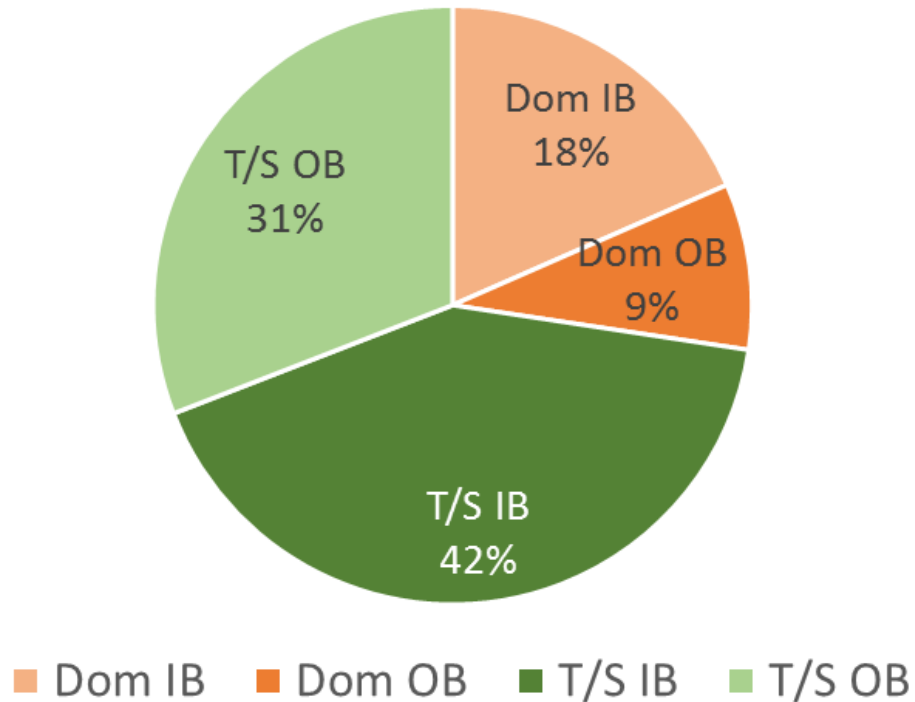
India - Total Throughput via PoC



- Total throughput 1.6m Teu (approx)
- Indian Transshipment is 35% of overall Transshipments in PoC

West Coast India

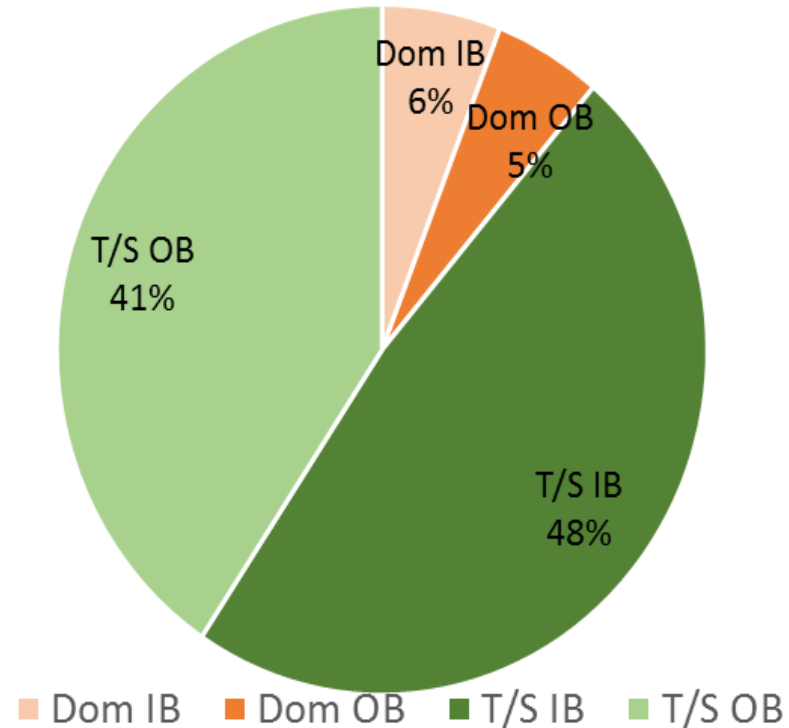
India - West Coast Ports



- Total throughput 0.48m Teu (approx.)
- Connectivity
 - Mumbai
 - Nhava Sheeva
 - Mundra
 - Pipavav
 - Mangalore
 - Hazira
 - Goa
 - Cochin

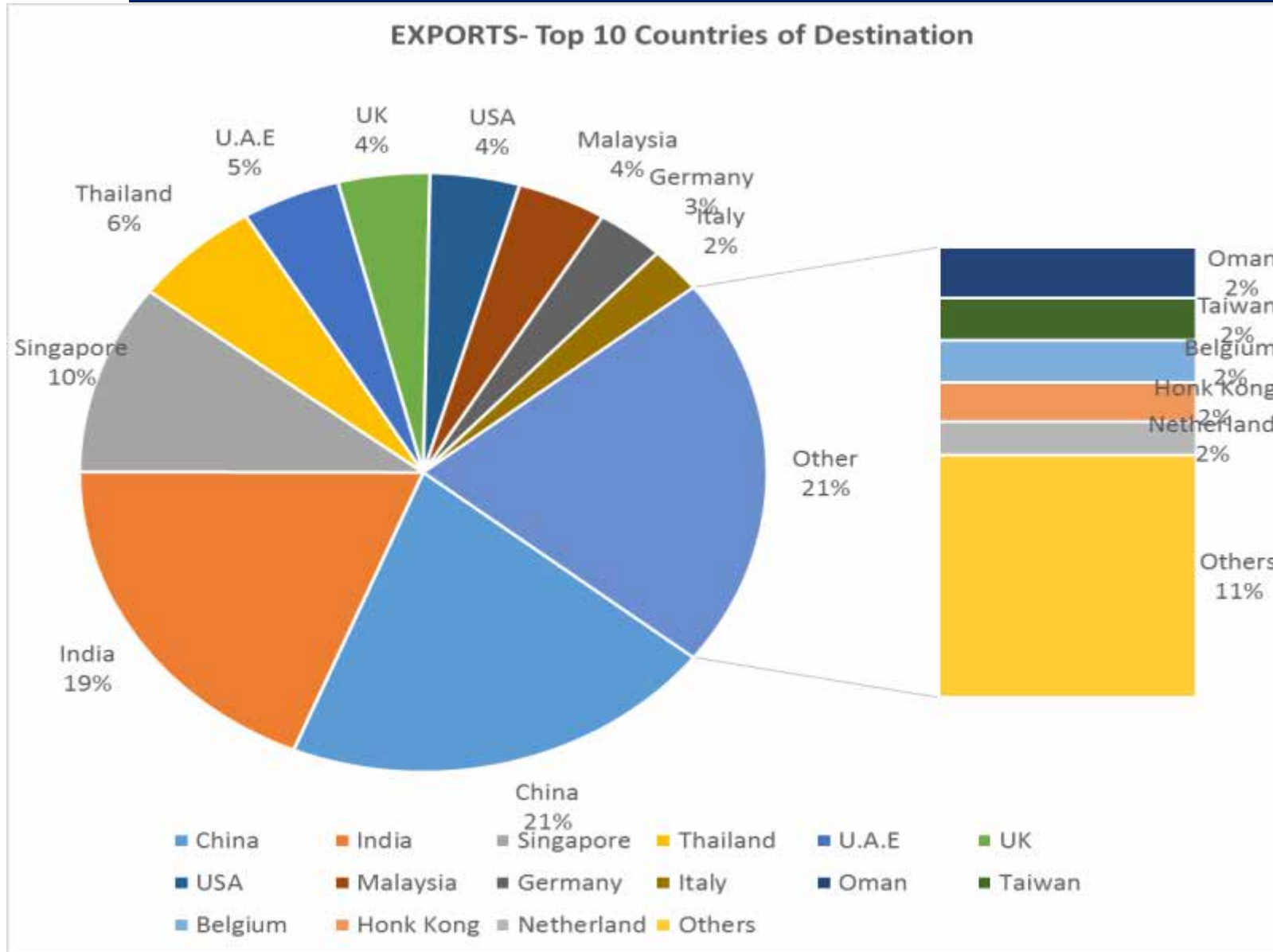
East Coast India

India - East Coast Ports



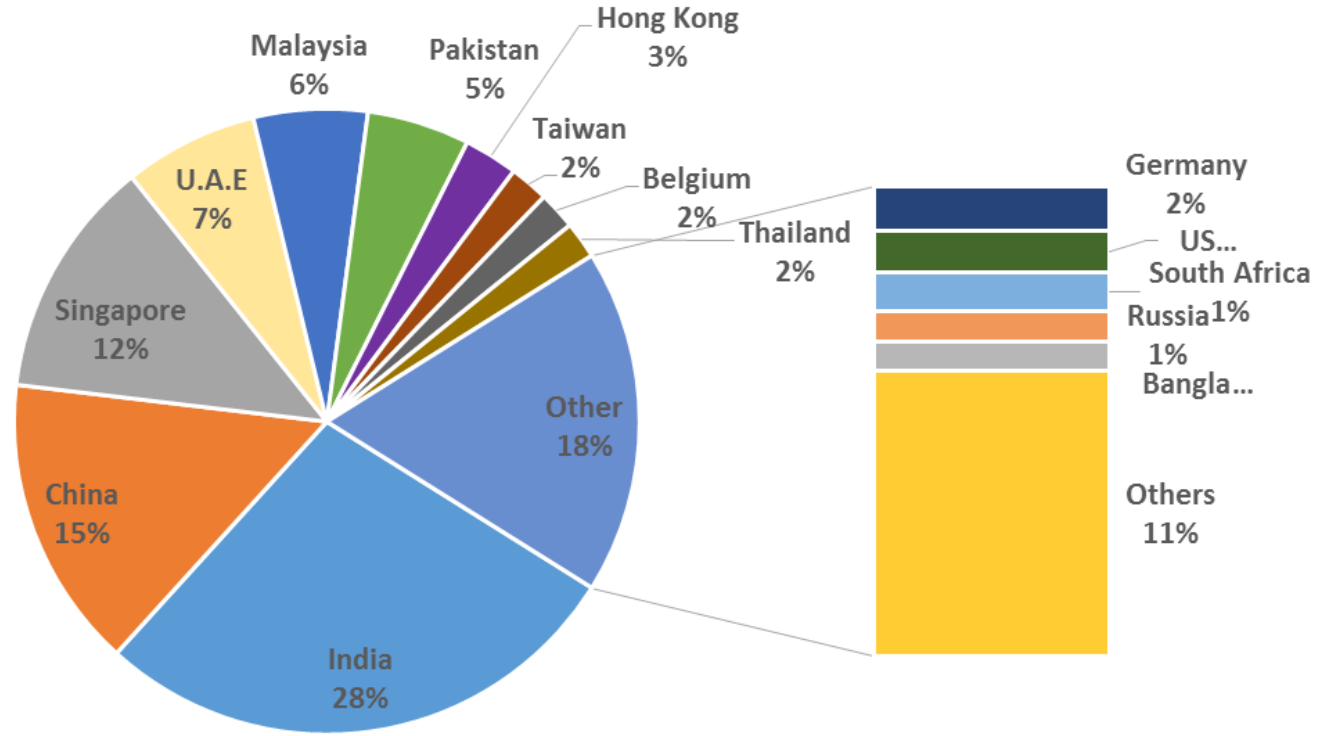
- Total throughput 1.1m Teu (approx.)
- Connectivity
 - Tuticorin
 - Chennai
 - Calcutta
 - Haldia
 - Krishnapatnam
 - Visakhapatnam

Port of Colombo - Exports



Port of Colombo - Imports

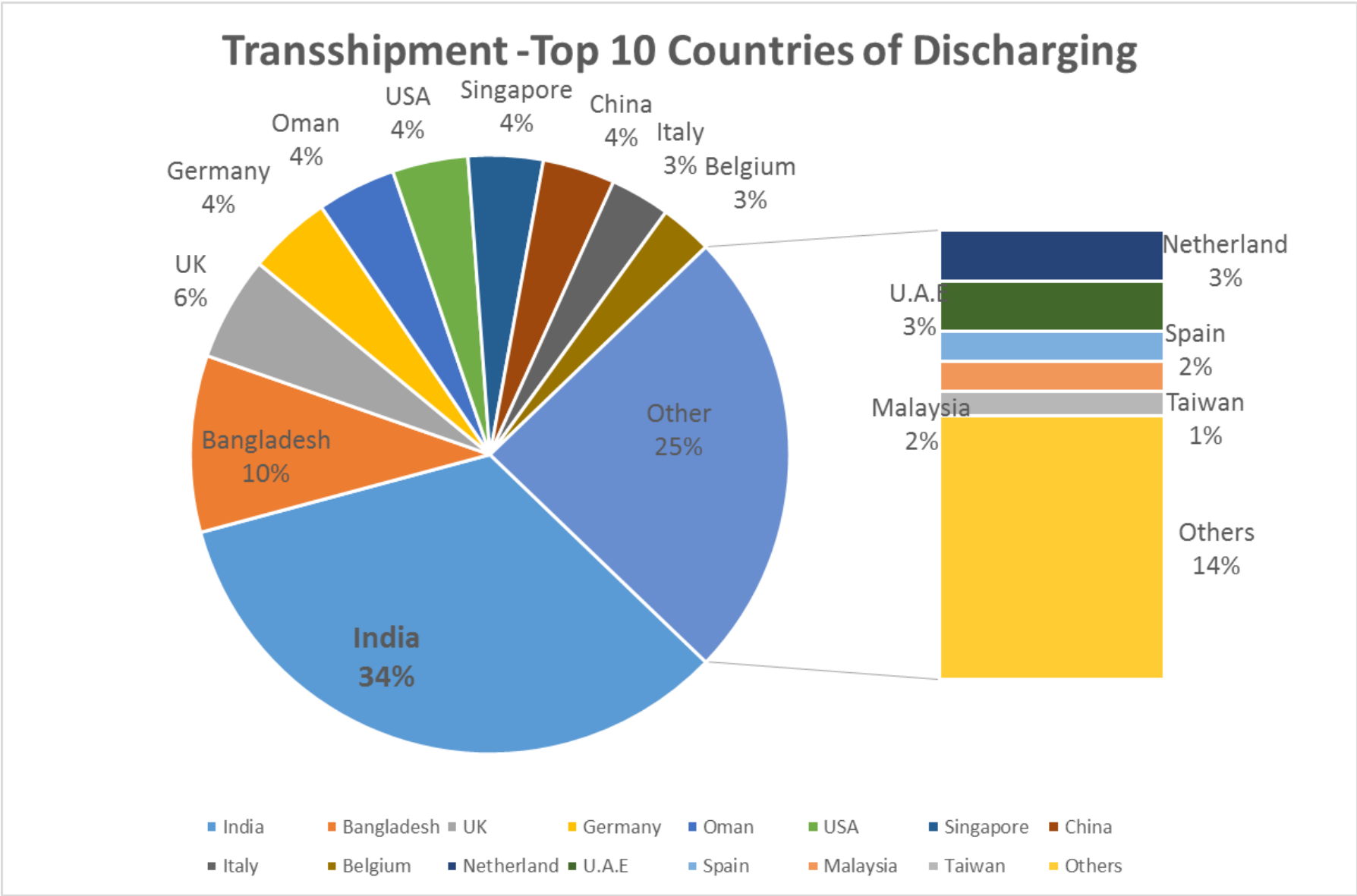
IMPORTS - Top 10 Countries of Origin



- India
- China
- Singapore
- U.A.E
- Malaysia
- Pakistan
- Hong Kong
- Taiwan
- Belgium
- Thailand
- Germany
- USA
- South Africa
- Russia
- Bangladesh
- Others

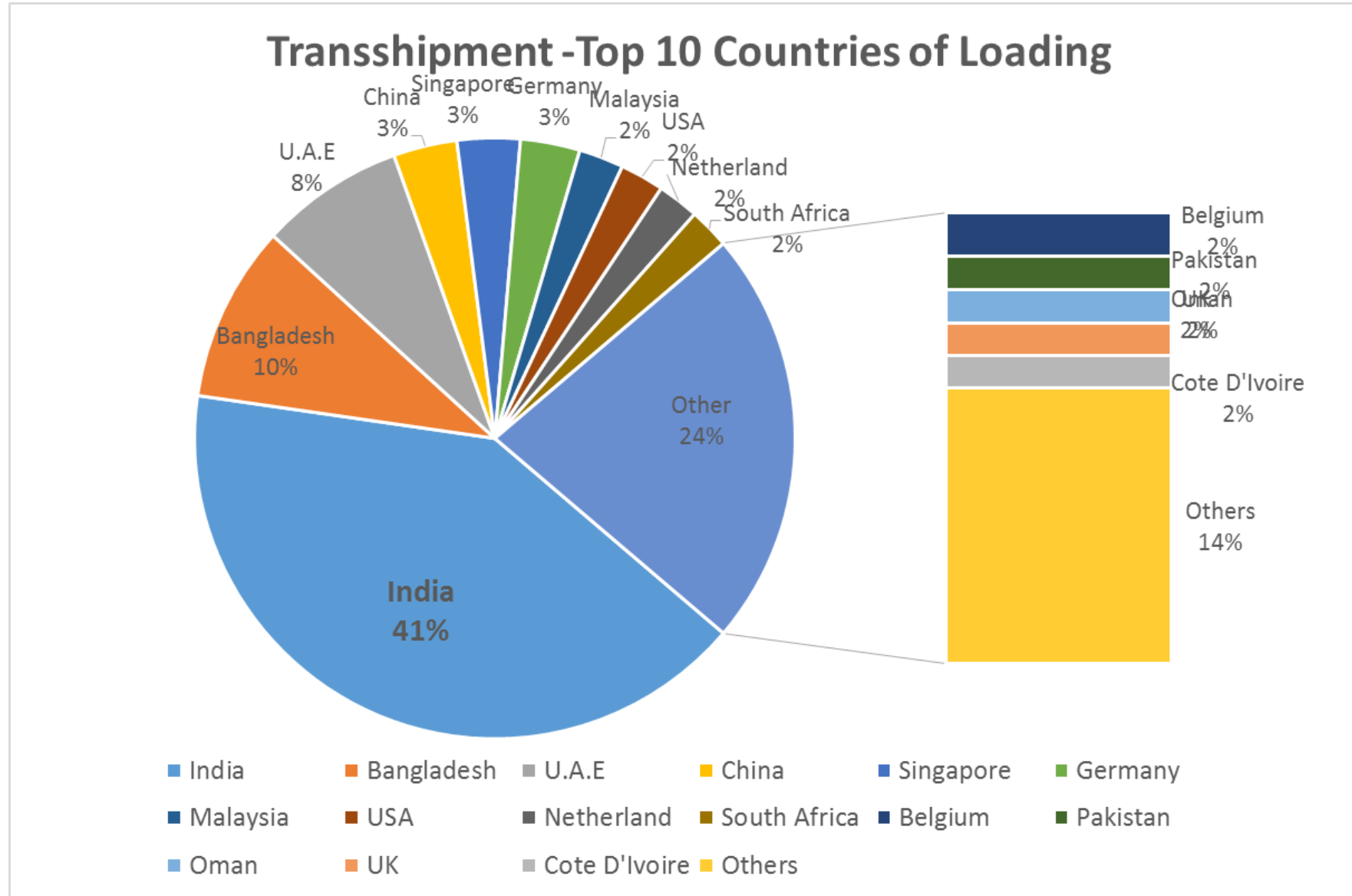
Source: SAGT Market Intel

Port of Colombo – OB Transshipment



Source: SAGT Market Intel

Port of Colombo – IB Transshipment



Regional Perspective

- India's "Sagar Malar"
- Rebalancing of socio-politico relationships
- Growing middle income group driving international trade
- India-ASEAN trade developments
- Foundations for greater regional trade growth
- Strong macro-economic fundamentals
- Geographic advantage
- Partnership of mutual gain

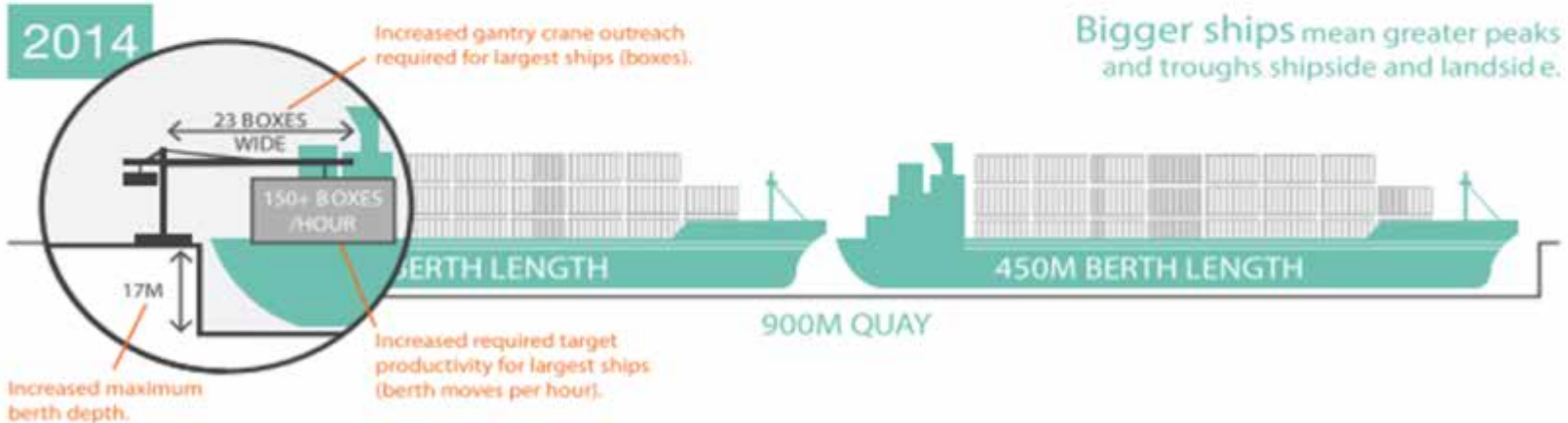
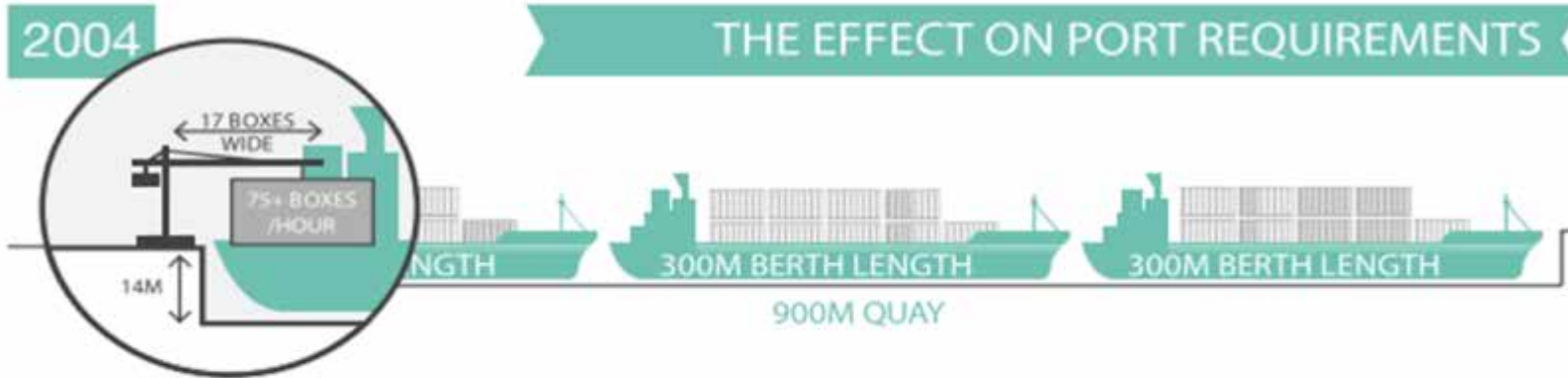
Carrier Industry Perspective

- Overall industry financial woes
- Big players getting stronger
- Active order book for big/bigger ships
- Reduced port calls greater exchange per port call
- Expansion of alliances
- Value proposition to end-users
- Projection of 60% trade growth in Intra-Asia region

Impact of “Big ships” on Terminals

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Key industry trends | Global Container Terminal Operators - 2014



BIGGER SHIPS = FEWER PORT CALLS/LESS FREQUENCY

Port of Colombo – A logical solution

- Available capacity in support of India's growth
- Geographical connectivity
- Speed to market networks
- An extended supply chain solution
- Over 50% of capacity available
- High-performance of 32 mph/crane (average)
- The only deep draft facility in South Asia
- Dawning of enhanced partnership

Thank you.