

CMA CGM

How do shipping lines prepare for the new port infrastructure in Africa ?

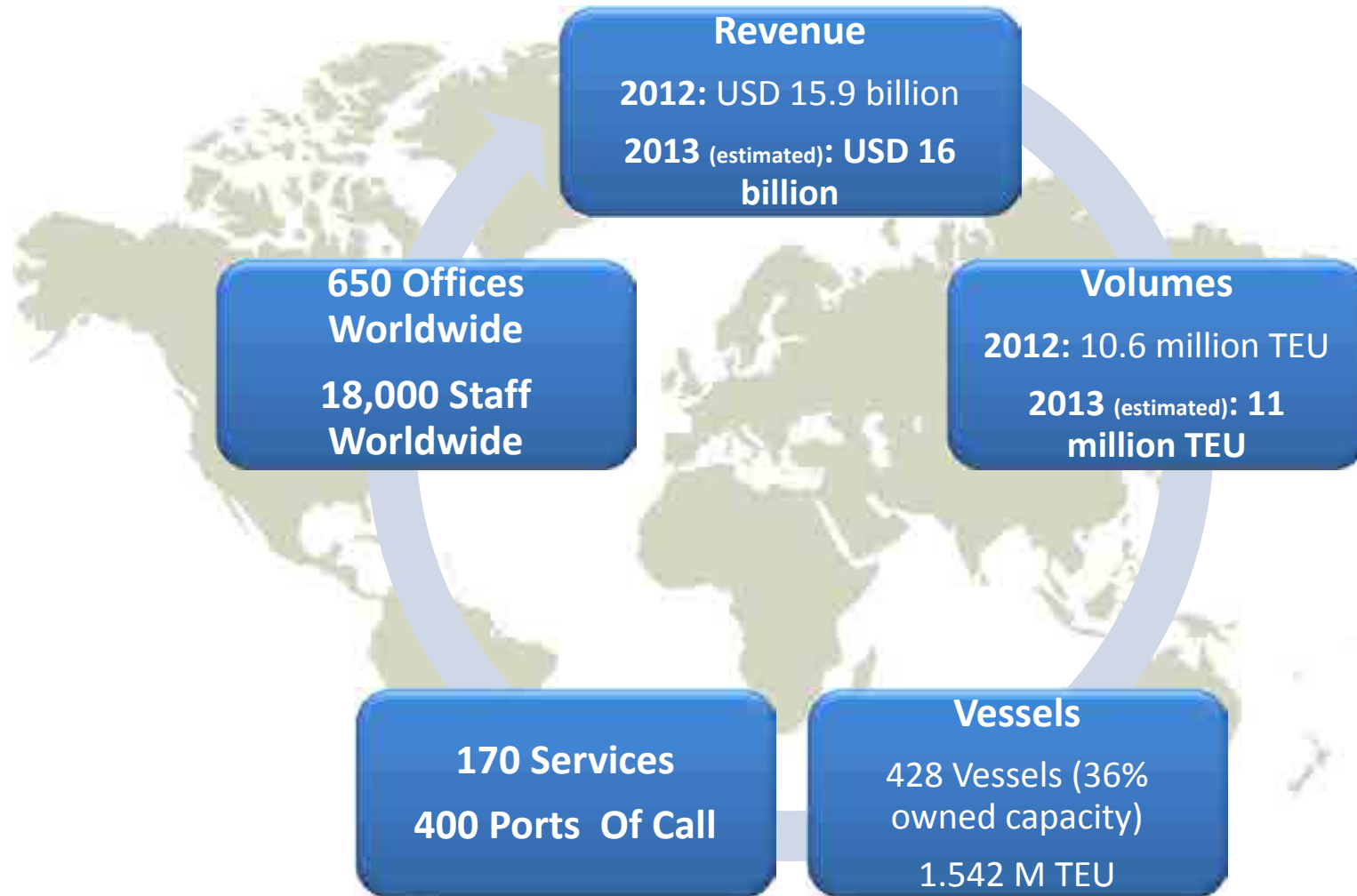




How do shipping lines prepare for the new port infrastructure in Africa?

1. CMA CGM Group in a few words
2. CMA CGM in Africa
3. How does CMA CGM prepare for the new port infrastructure in Africa?

1. CMA CGM Group in a few words



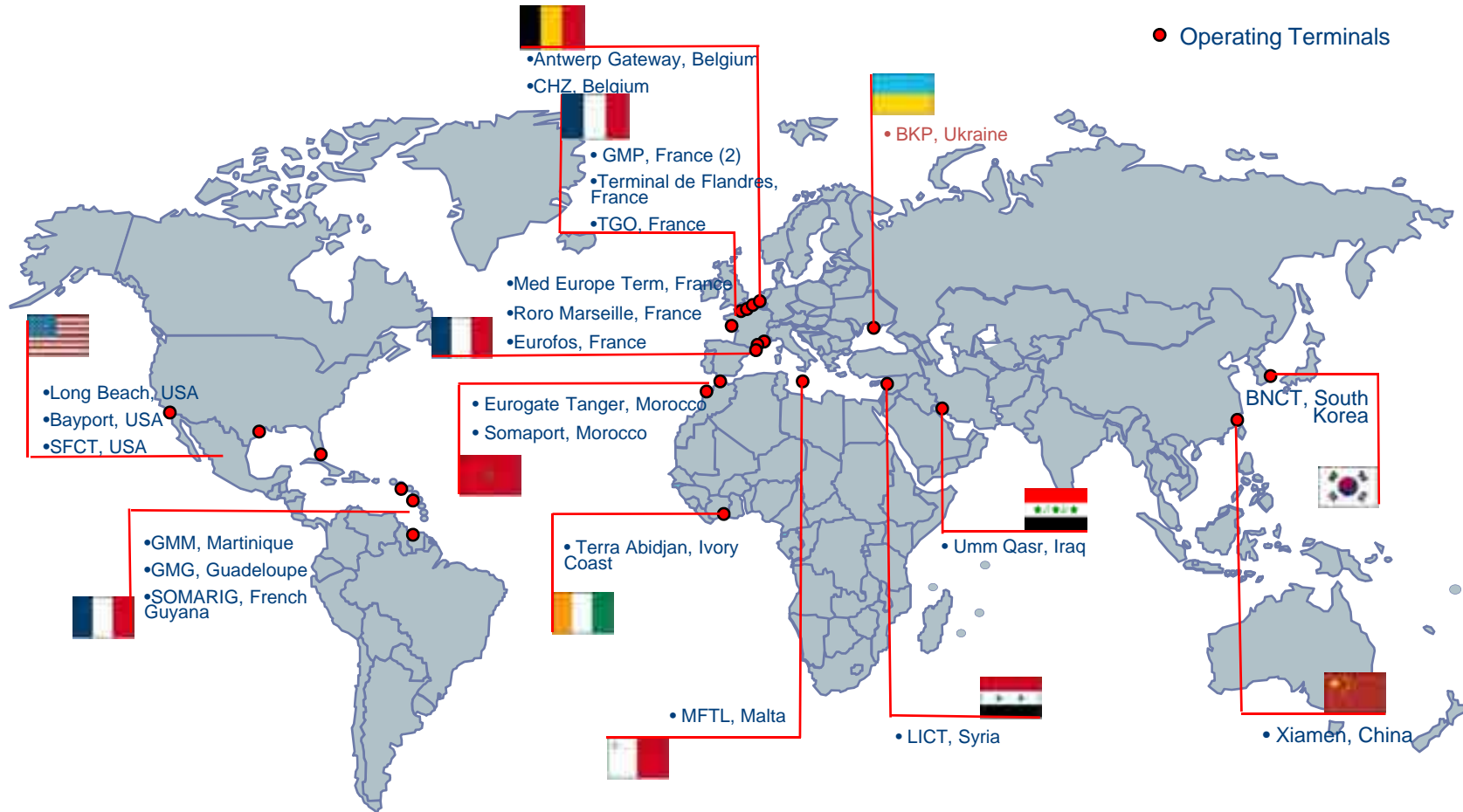
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1. CMA CGM Group in a few words



1. CMA CGM Group in a few words

24 terminals in operation in 11 countries



2. CMA CGM Group in Africa



- › A leading shipping company in Africa
- › Our shipping services in Africa

2. CMA CGM Group in Africa



Our commitment

To strengthen our current positions
and to be active on all African markets

Our ambition

To improve our leadership in shipping and
transport logistics in Africa

2. CMA CGM Group in Africa

CMA CGM, together with its brand DELMAS, offers:

- › A second-to-none international network in liner services
- › Land based connections with a growing direct presence in Sub-Sahara Africa countries
- › Local expertise
- › Tailor-made solutions adapted to meet specific African trade characteristics, from and to all destinations including land-locked countries.

An international Group with strong positions in Africa

- › N° 1 in Angola, Gabon, Senegal, and Democratic Republic of Congo
- › Within the Top 3 in Benin, Cameroun, Congo, Cote d'Ivoire, Ghana, Nigeria

- › 72 Offices in 43 countries
- › > 1,300 dedicated staff
- › 48 ports of call
- › 25 direct lines & 5 feeder services
- › 1,200,000 teu carried in 2013

2. CMA CGM Group in Africa

CMA CGM Shipping Services in Africa



- › 25 Line services calling Sub-Saharan Africa
- › To and from West, East and Southern Africa, including the Indian Ocean Islands
- › A dedicated network of feeders to support the development of regional trades
- › Connections to the global lines Network of CMA CGM via its dedicated Tangier Hub for West Africa, Khor Fakkan and Port Kelang Hubs for East, West and Southern Africa

3. How does CMA CGM prepare for the new port infrastructure in Africa?



- › Developing and improving services
- › Investing in Port Terminals
- › Developing and improving inland services
- › Encouraging development of Port Equipment

3. How does CMA CGM prepare for the new port infrastructure in Africa?

Africa economy boom will continue in the next decade

Africa Today

\$1.6 trillion

Africa's collective GDP in 2008, roughly equal or Brazil's or Russia's

\$860 billion

Africa's combined consumer spending in 2008

316 million

The number of new mobile phone subscribers signed up in Africa since 2000

60%

Africa's share of the world's total amount of uncultivated, arable land

52

The number of African cities with more than 1 million people each

20

The number of African companies with revenues of at least \$3 billion

Africa Tomorrow

\$2.6 trillion

Africa's collective GDP in 2020

\$1.4 trillion

Africa's consumer spending in 2020

1.1 billion

The number of Africans of working age in 2040

128 million

The number of African households with discretionary income in 2020

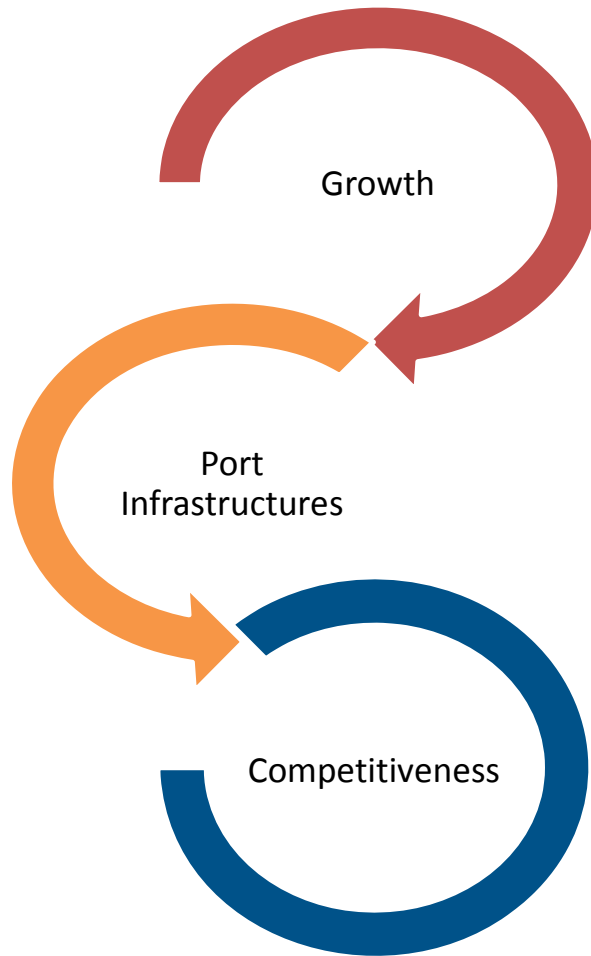
50%

The portion of Africans living in cities by 2030

Source McKinsey Global Institute

3. How does CMA CGM prepare for the new port infrastructure in Africa?

African growth sets new challenges to be addressed



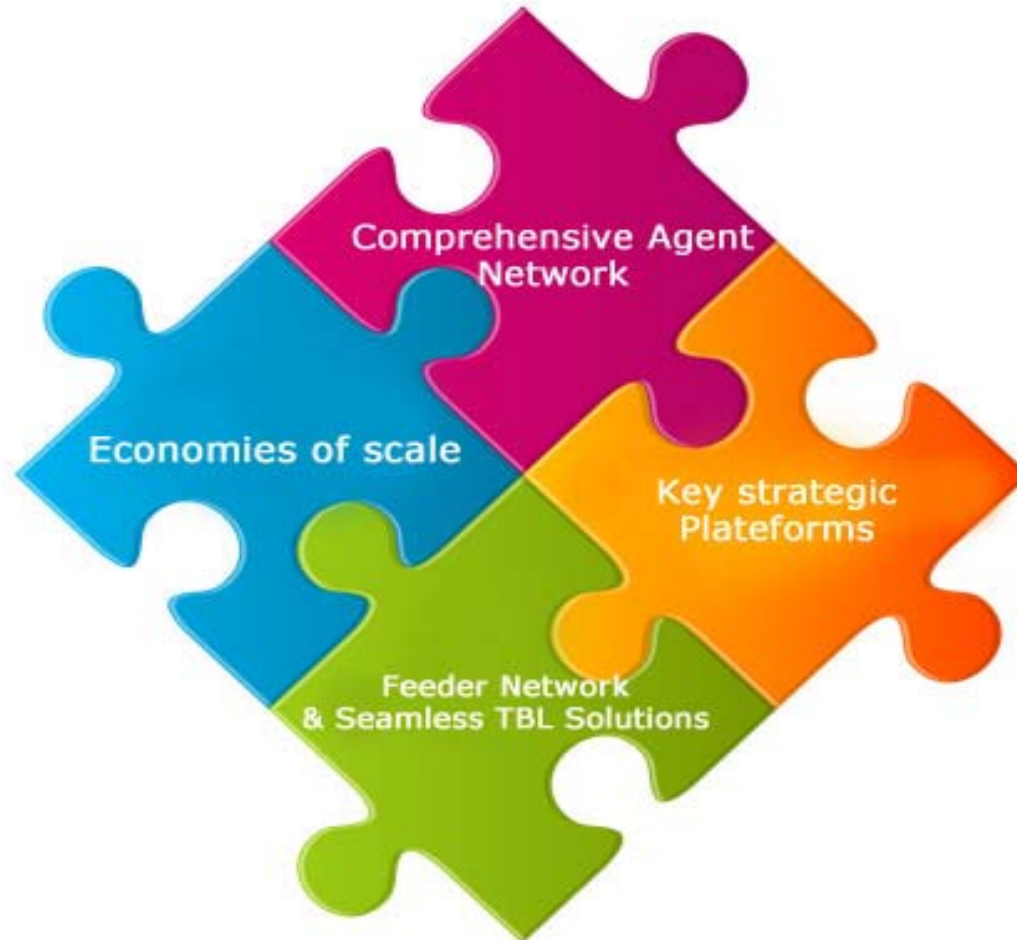
+5% growth over the last ten year and for the next upcoming years.

8 deep draft ports by 2017

A competitive environment constantly evolving = competitiveness requirements keep increasing

3. How does CMA CGM prepare for the new port infrastructure in Africa?

CMA CGM growth strategy in Africa



3. How does CMA CGM prepare for the new port infrastructure in Africa?

Objective n° 1 : Developing and improving services

West Africa

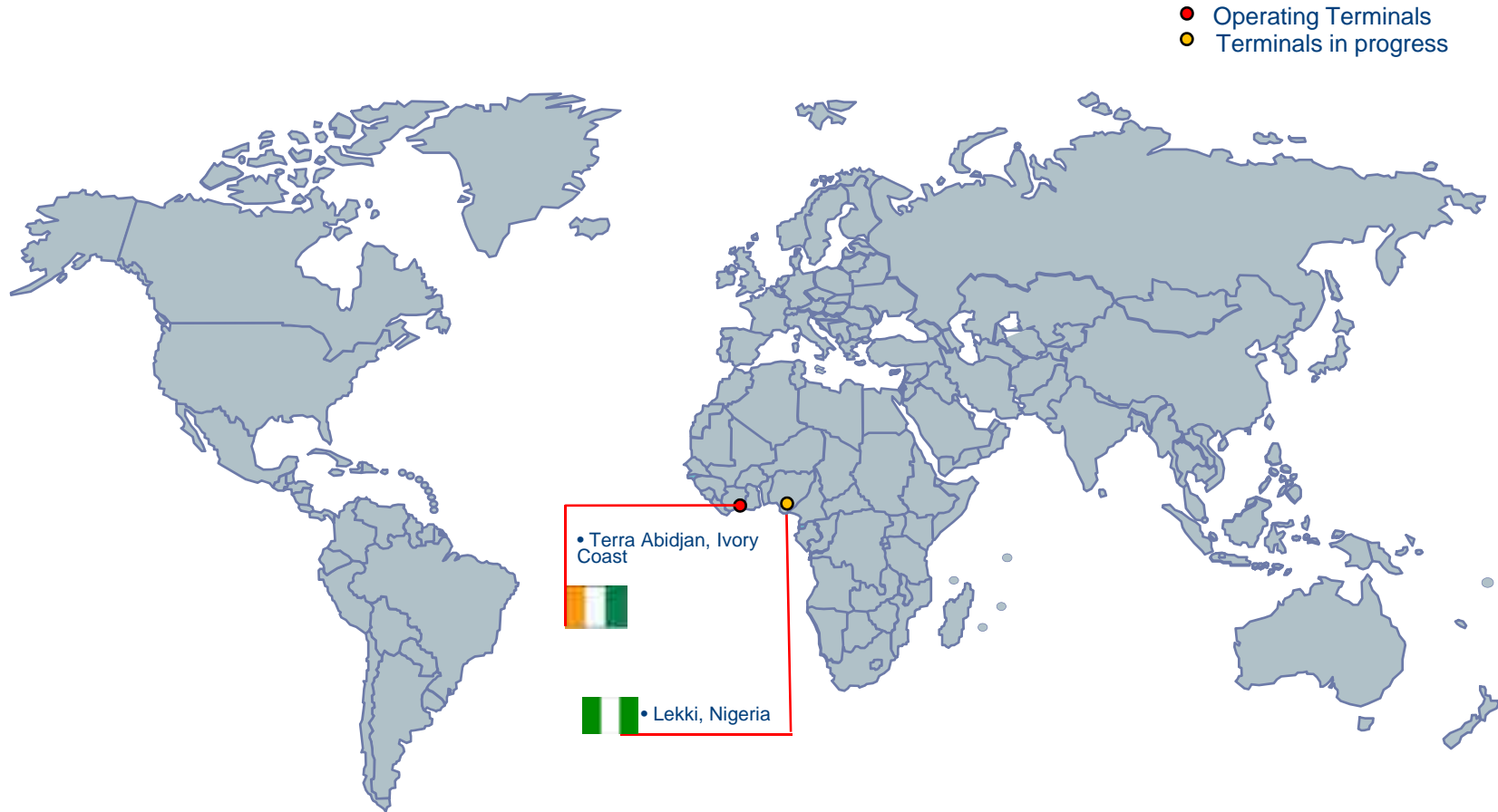
- › Deep - seated in Africa, CMA CGM Group serves West Africa , East Africa and South Africa as well as Indian Ocean
- › CMA CGM Group holds a 23% market share in West Africa
- › 1,09 Million TEU static annual capacity is deployed on the Africa Lines services with a modern fleet of 130 vessels up to 6,500 TEU
- › CMA CGM Group is the first shipping company to deploy 5 700 Teus vessel in West Africa
- › 25 direct services dedicated to Sub Saharan Africa combined with a 5 coastal feeder network to sustain the rapid African growth
- › CMA CGM Group serves also secondary ports:
 - San Pedro
 - Takoradi
 - Malabo
 - Buchanan
 - Libreville
 - Port Gentil

Nigeria

- › CMA CGM has been present in Nigeria since 2001 and has 131 dedicated staff members with two offices in Apapa and Port Harcourt
- › CMA CGM holds a leading position in Nigeria and ranked number 2
- › 9 Weekly Call per week
- › CMA CGM connects Nigeria to Asia, India Middle East and Europe via direct services
- › CMA CGM connects Nigeria through its relay services to Latin and North Americas and Oceania
- › CMA CGM calls in the 3 Nigerian Ports:
 - Apapa
 - Tincan Lagos
 - Onne
- › CMA CGM offers 3 direct weekly services from Asia

3. How does CMA CGM prepare for the new port infrastructure in Africa?

Objective n° 2 : Investing in ports and terminals in Africa



3. How does CMA CGM prepare for the new port infrastructure in Africa?

Objective n° 2 : The example of Lekki terminal

Key advantages

- › **Strategic location** in the largest populated country and 2nd largest economy in Africa, with **booming local market**
- › Much-needed terminal in a **highly congested** port zone with poor productivity for vessels operations
- › Modern and **deep sea** facility, making it a natural transshipment hub for West-African cargo
- › Strong **governmental support**, including direct participation of Nigerian Port Authority
- › Existing **access roads** with on-going improvement/expansion works

Main features

- › 1.2 km quay, -16m draft
- › 70 ha yard, 16'440 ground slots (238 reefer)
- › 14 Post-Panamax STS, 48 RTGs
- › 18 Gate lanes
- › Dedicated power supply
- › State-of-the-art optic fibre connectivity and TOS/TAS
- › 2.5 million TEUs capacity
- › Opening in 2017



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Objective n° 2 : The example of Lekki terminal

Role of CMA Terminals

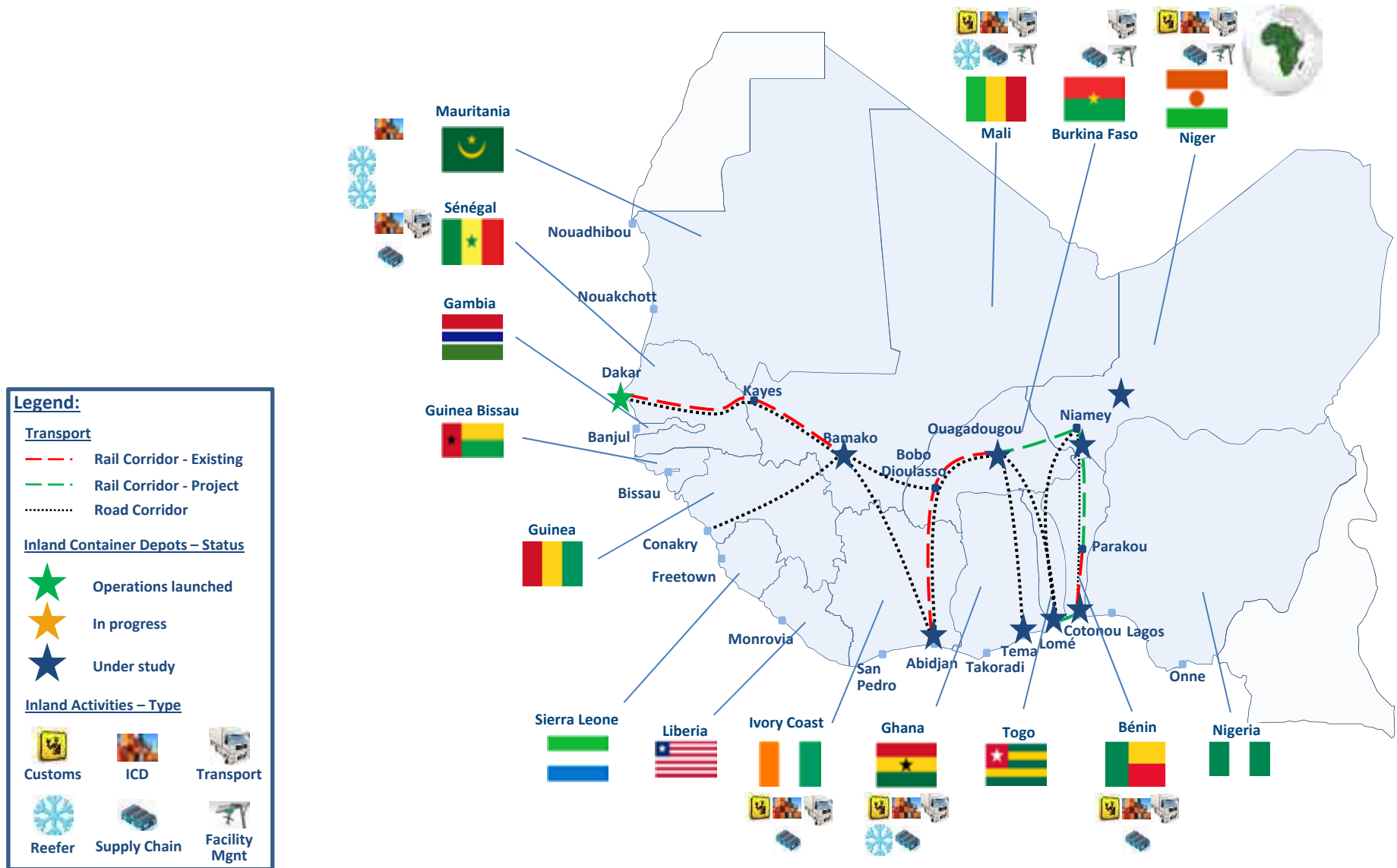
- › CMAT Terminals and ICTSI, through their Joint-venture Lekki International Container Terminal Services LFTZ Enterprise (LICTSLE), are in charge of **designing, equipping, manning and operating the container terminal** for a period of 21 years from operation start
- › The Master concessionaire of Lekki Port zone, LPLE, is to provide the terminal infrastructure and is also responsible for maritime infrastructure, marine services and maintenance dredging
- › Apart from its participation as terminal operator, CMA Terminals will play a particular role in **ensuring full support from CMA CGM lines**, ensuring high filling factor of the terminal from Day 1 of operations

Why is Lekki a strategic investment for CMA CGM Group?

- › Invest in the 1st consumer market in West Africa
- › Increase market access & market share in Nigeria through secured berthing windows and much improved vessels operations
- › Increase market access & market share in West Africa by using Lekki as a regional transshipment hub – notably enabling the use of larger vessels on main trades
- › Benefit from the financial return of terminal operations

3. How does CMA CGM prepare for the new port infrastructure in Africa?

Objective n° 3: Developing and improving Inland Services



Legend:

Transport

- Rail Corridor - Existing
- Rail Corridor - Project
- Road Corridor

Inland Container Depots – Status

- ★ Operations launched
- ★ In progress
- ★ Under study

Inland Activities – Type

- Customs
- ICD
- Transport
- Reefer
- Supply Chain
- Facility Mgmt

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Objective n° 3: Developing and improving Inland Services

DELMAS and **CMA CGM** go beyond sea transportation offering customers a global service which, similar to our maritime services, relies on a global office network at close proximity to their markets

- “Through Bill of Lading” service (TBL), customs clearance, warehousing including inland haulage and Reefer activities (Plugging, Monitoring).
- Tailor-made service to serve land-locked countries through secured transport corridors
- CMA CGM owns 3 off docks in West Africa: 2 in Dakar and 1 in Cameroun (opening in May 2014)
- CMA CGM serves 29 sub-Saharan countries via inland corridors



3. How does CMA CGM prepare for the new port infrastructure in Africa?

Objective n° 4: Encouraging development of Port Equipment

Our success depends on investments by Local authorities and governments:

- Deep Sea port of 16m draft
- Berth length of 350 meters each
- Gantries with minimum double lift
- Productivity minimum of 35moves per hour per crane
- 3 cranes / 3 experienced gangs per vessel
- Shore equipment for evacuation (RTGs and Reach Stackers)
- Stacking system in place
- Fixed windows
- Efficient / Fast customs system in place (automatic system)
- Train connection with the terminal for fast evacuation



CONCLUSION

CMA CGM
Leader of transport
in Africa



The development of ports in Africa is offering new challenges and opportunities which need to be addressed through joint efforts by all economic stakeholders.

For CMA CGM, this effort means :

- › **Investing** in Terminal and Port development
- › **Improving** services
- › **Optimizing** operational efficiency
- › **Developing** Intermodal solutions



Thank you

