



OPPORTUNITIES OF MIDDLE CORRIDOR: FROM THE EYE OF A GLOBAL SHIPPING LINE

03/07/2024, CONSTANTA



ALKAN ALICIK

MSC GROUP OVERVIEW

CARGO DIVISION



PASSENGER DIVISION

CRUISE DIVISION



FERRY DIVISION



RAIL DIVISION



OTHER ENTITIES



MSC GROUP

KEY NUMBERS

CARGO DIVISION

- Leading shipping conglomerate
- **No 1** shipping line worldwide
- **830** vessels
- **5** aircraft
- **300 routes**
- **520** ports of call
- **100** terminals (all MSC Group entities)
- **24.5** million TEUs carried annually
- **675** offices
- **155** countries

PASSENGER DIVISION*

CRUISE DIVISION

Two brands: **MSC Cruises** in the contemporary segment, and **Explora Journeys** in luxury

MSC Cruises

- **25** vessels by the end of 2027
- **4.1M** guests of **185** nationalities welcomed on board
- **102** countries visited by MSC Cruises ships
- **340** itineraries offered worldwide

Explora Journeys

- Luxury brand Explora Journeys began operating in July 2023 with ship **EXPLORA I**
- 2nd ship to sail in August 2024
- A total fleet of **6** ships by 2028

Worldwide, the MSC Group has almost **200,000** staff on board and ashore (all entities combined).

Note: Estimated key numbers Jan. 2024

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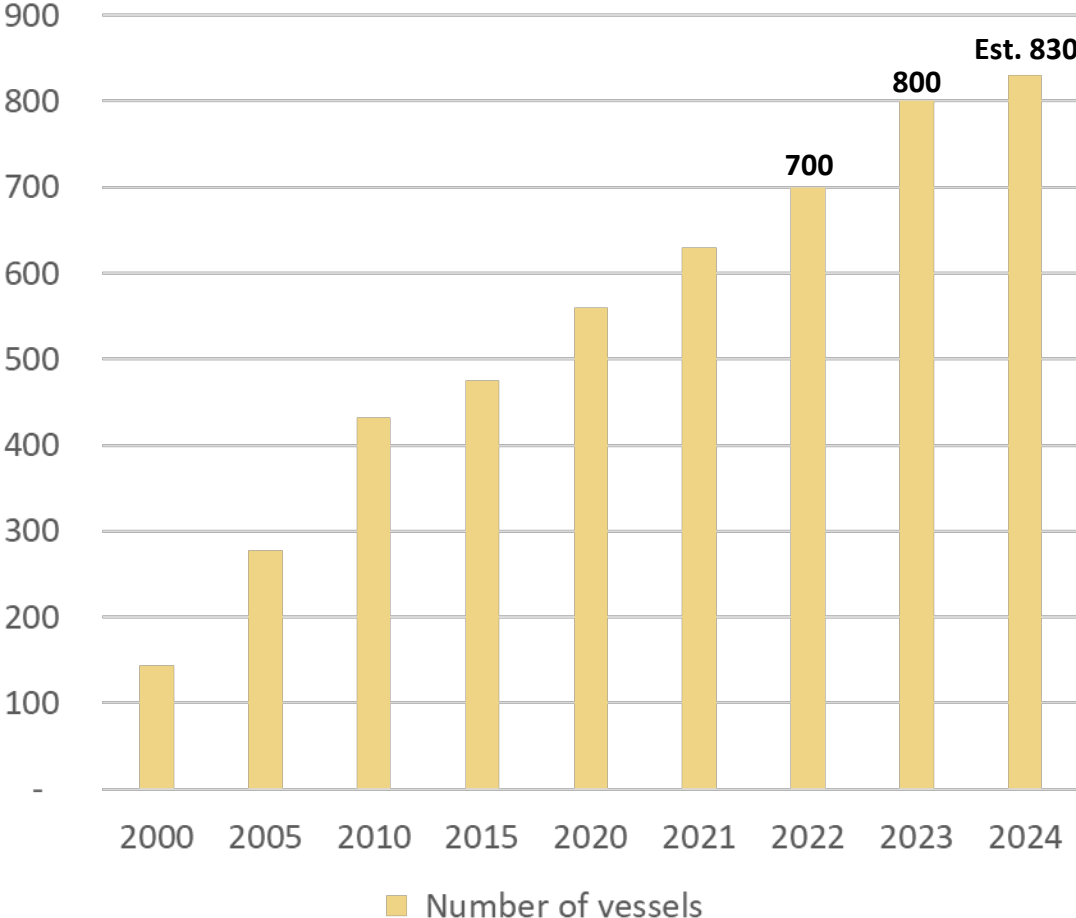


*not including GNV, SNAV and Italo

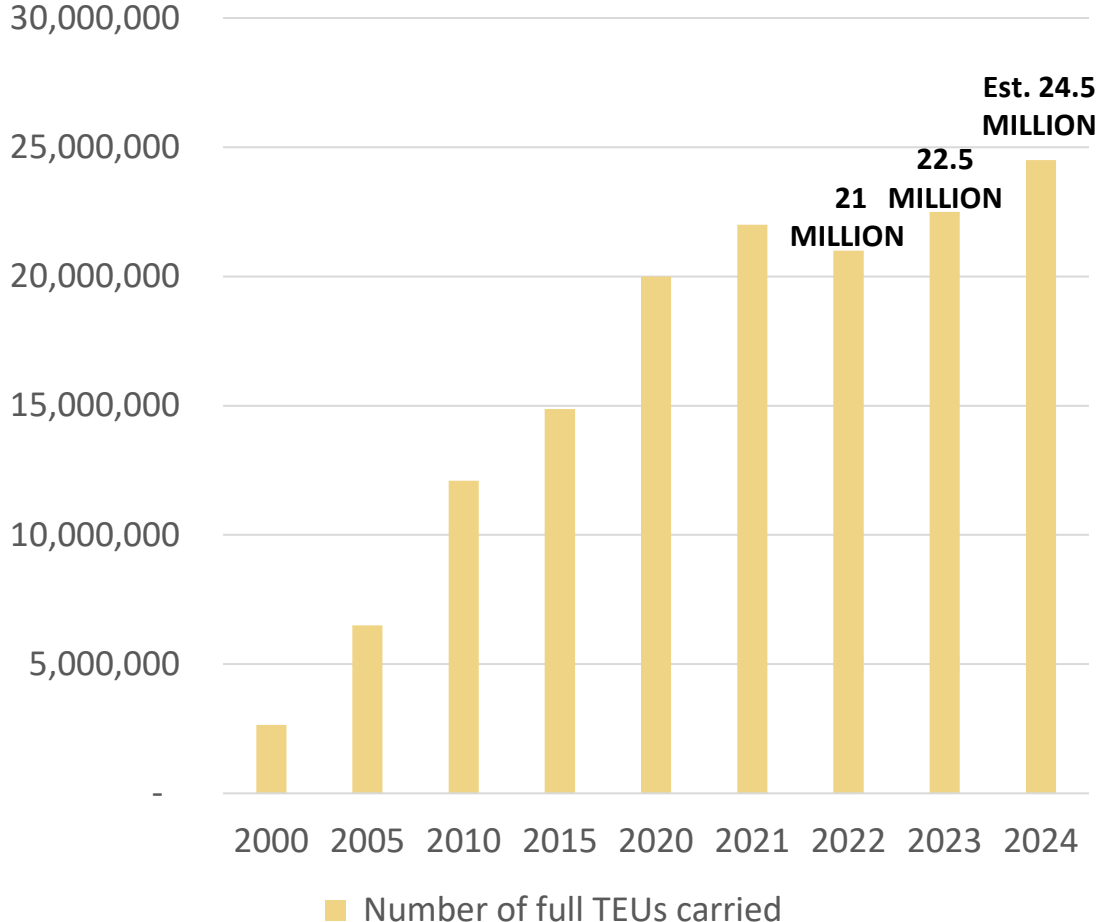
MSC'S GROWTH



MSC FLEET



TEUs CARRIED



MSC SOLUTIONS

[MSC.COM/SOLUTIONS](https://www.msc.com/solutions)

SHIPPING • INLAND TRANSPORT & LOGISTICS • DIGITAL • CARGO COVER

TRADE SERVICES



REEFER CARGO / RAIL



DIGITAL SOLUTIONS



PROJECT CARGO



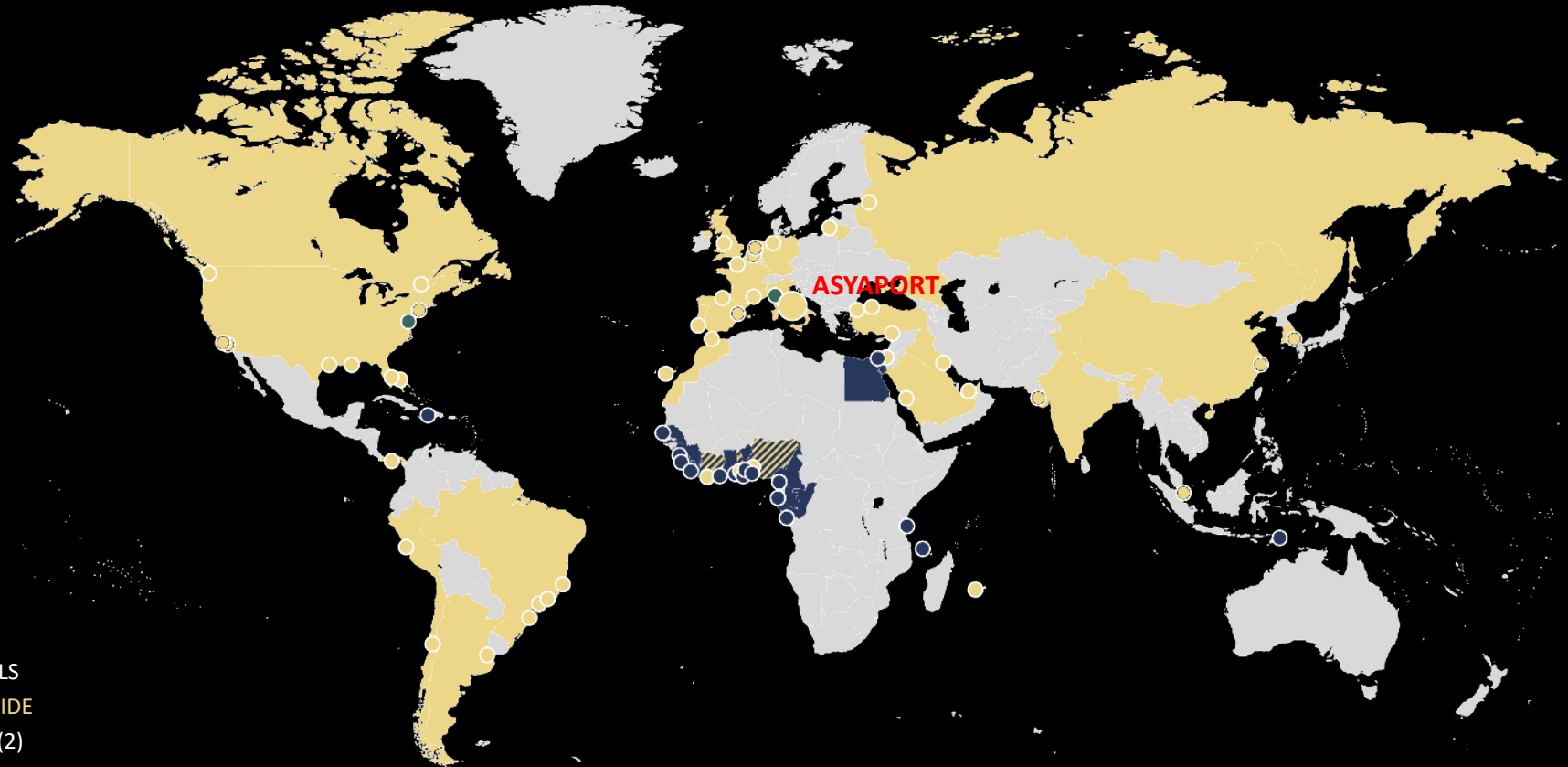
WAREHOUSING



CARGO COVER SOLUTIONS



TIL PRESENCE IN THE MAIN PORTS OF THE WORLD



- MSC CARGO & TIL'S TERMINALS
- TOP 30 TERMINALS WORLDWIDE
- TIL'S GREENFIELD TERMINALS (2)

ARGENTINA Buenos Aires	CANADA Montreal	INDIA Mundra	Naples Ravenna Trieste Venice	NIGERIA Tin Can (3)	SINGAPORE	UAE Abu Dhabi	● AGL'S TERMINALS* (24)	Dakar (Senegal) - 2	Kribi (Cameroon)
BAHAMAS Freeport	CHILE Valparaiso	IRAQ Umm Qasr	CÔTE D'IVOIRE San Pedro	PANAMA	SOUTH KOREA Busan	UK Liverpool		Conakry (Guinea) - 2	Libreville (Gabon)
BELGIUM Antwerp	CHINA Ningbo	ISRAEL Ashdod	PERU Callao	PORTUGAL Sines	SPAIN Bilbao Las Palmas Valencia	USA Baltimore Houston Long Beach Los Angeles Newark	Monrovia (Liberia) - 2	Moroni (Comoros)	
BRAZIL Navegantes Rio Santos Vitoria	FRANCE Fos-sur-Mer La Réunion Le Havre	ITALY Ancona Civitavecchia Genoa (3) Gioia Tauro La Spezia Leghorn	LITHUANIA Klaipeda	RUSSIA St. Petersburg	TOGO Lomé	New Orleans Port Everglades Seattle	Abidjan (Côte d'Ivoire) - 3	Dili (Timor-Leste)	
	GERMANY Bremerhaven	MOROCCO Tangier	NETHERLANDS Rotterdam	SAUDI ARABIA King Abdullah	TÜRKIYE Asyaport Iskenderun Marport		Tema (Ghana)	Port au Prince (Haïti)	
							Lomé (Togo)	Malindi (Zanzibar)	
							Cotonou (Bénin)	Pointe Noire (Congo) - 2	
							Lagos (Nigeria)	Port-Saïd (Egypt)	

* MSC has reinforced its continuous investment in Africa with the introduction of the AGL brand. Standing for "Africa Global Logistics", AGL is the new name for the business formerly known as Bolloré Africa Logistics, or BAL.

MEDLOG

ONE-STOP-SHOP FOR GLOBAL INLAND SOLUTIONS

INLAND TRANSPORTATION

- Transport Solutions By Truck/Rail/Barge

INLAND INFRASTRUCTURE

- Inland Container Depots
- Container Freight Stations (CFS)
- Cold Storage, Dry Warehousing and Distribution

VALUE-ADDED SOLUTIONS

- Customs House Brokerage
- Reefer Solutions
- Project Cargo and Industrial Logistics
- Port Agent/Ship Consignment
- Weighing and Fumigation
- Flexibags
- Automotive Container Shipping
- Container Rental or Sales
- Collateral Management

WAREHOUSING



DEPOTS & REEFER SOLUTIONS



TRUCKS & RAIL



FUMIGATION



MEDLOG

Transport & Logistics

MEDLOG

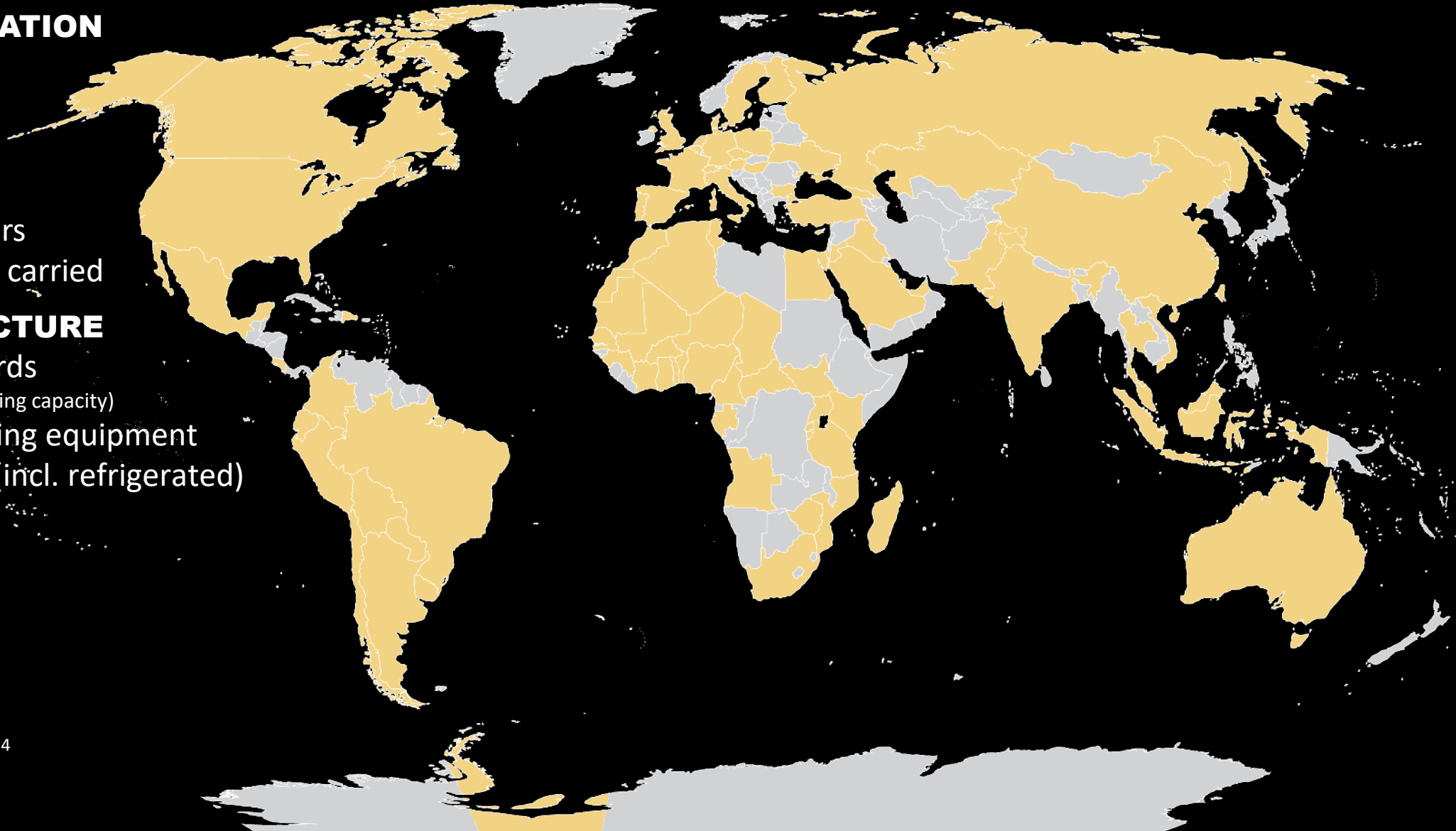
PRESENT IN OVER 80 COUNTRIES WORLDWIDE

TRANSPORTATION

- trucks
- trailers
- rail wagons
- locomotives
- barges/feeders
- 6.3 Mio TEUs carried

INFRASTRUCTURE

- Operating yards
(1.2 Mio TEUs stacking capacity)
- container lifting equipment
- warehouses (incl. refrigerated)
- reefer plugs



Note: key numbers Jan. 2024

AGL (AFRICA GLOBAL LOGISTICS)

AGLGROUP.COM

AT THE HEART OF AFRICA'S TRANSFORMATION

AGL (Africa Global Logistics) is the reference multimodal logistics operator (port, logistics, sea and rail) in Africa.

Having developed its expertise over more than a century and with more than **23,000 employees** working in **49 countries**, and operating **22 port concessions**, AGL provides its African and global customers with global, customized and innovative logistics solutions, with the goal of contributing in a sustainable way to the transformation of Africa. AGL is also present in Haiti and Timor.

Thanks to MSC, AGL renews its ambition to contribute in a sustainable way to Africa's major transformations:

- Provider of global logistics solutions in Africa
- Driver of global connectivity of African regions
- Contributor to sustainable and inclusive growth in Africa

AGL offers **4 solutions**:

Port ♦ Shipping ♦ Logistics ♦ Railway



Note: key numbers Jan. 2024

MSC GEORGIA



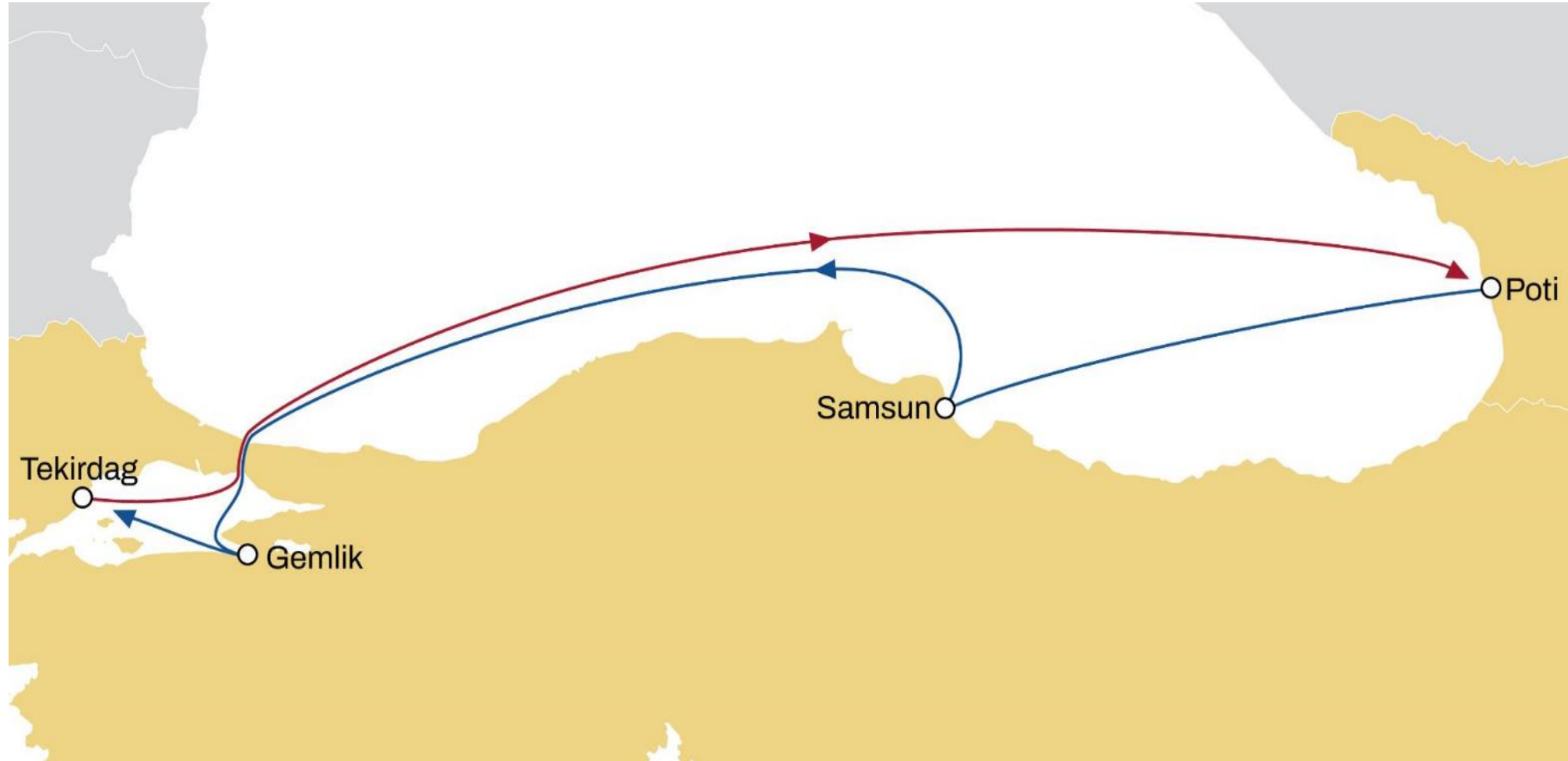
MSC GEORGIA

- Market leader
- Established in 2009
- 3 offices
- 58 employees

• MEDLOG GEORGIA

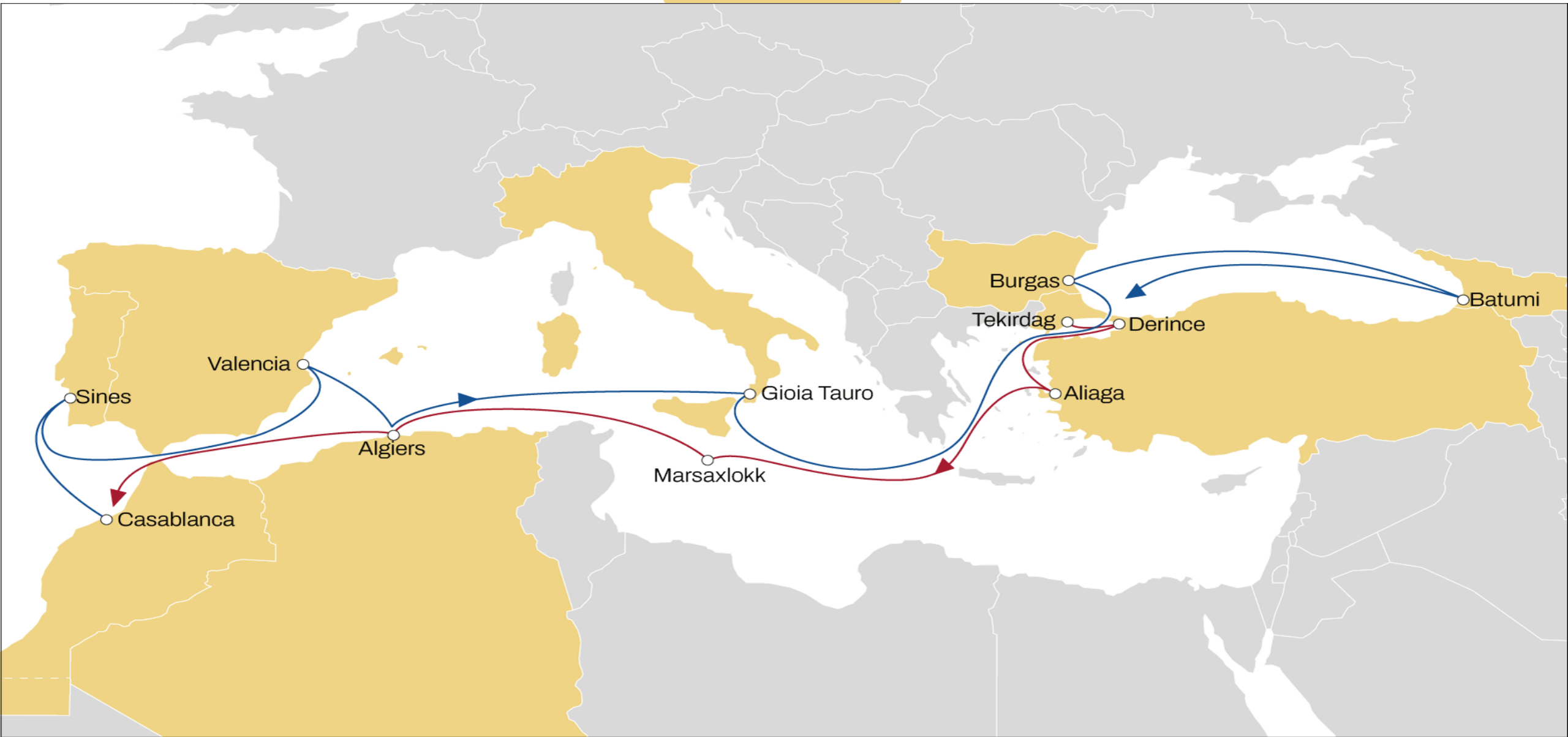
- Established in 2018
- 3 offices
- 130 employees
- Off-dock & CFS facilities in Poti and Batumi
- Wide variety of backlog logistics solutions

MSC TRADE SERVICES TURKEY-POTI-BATUMI FEEDER

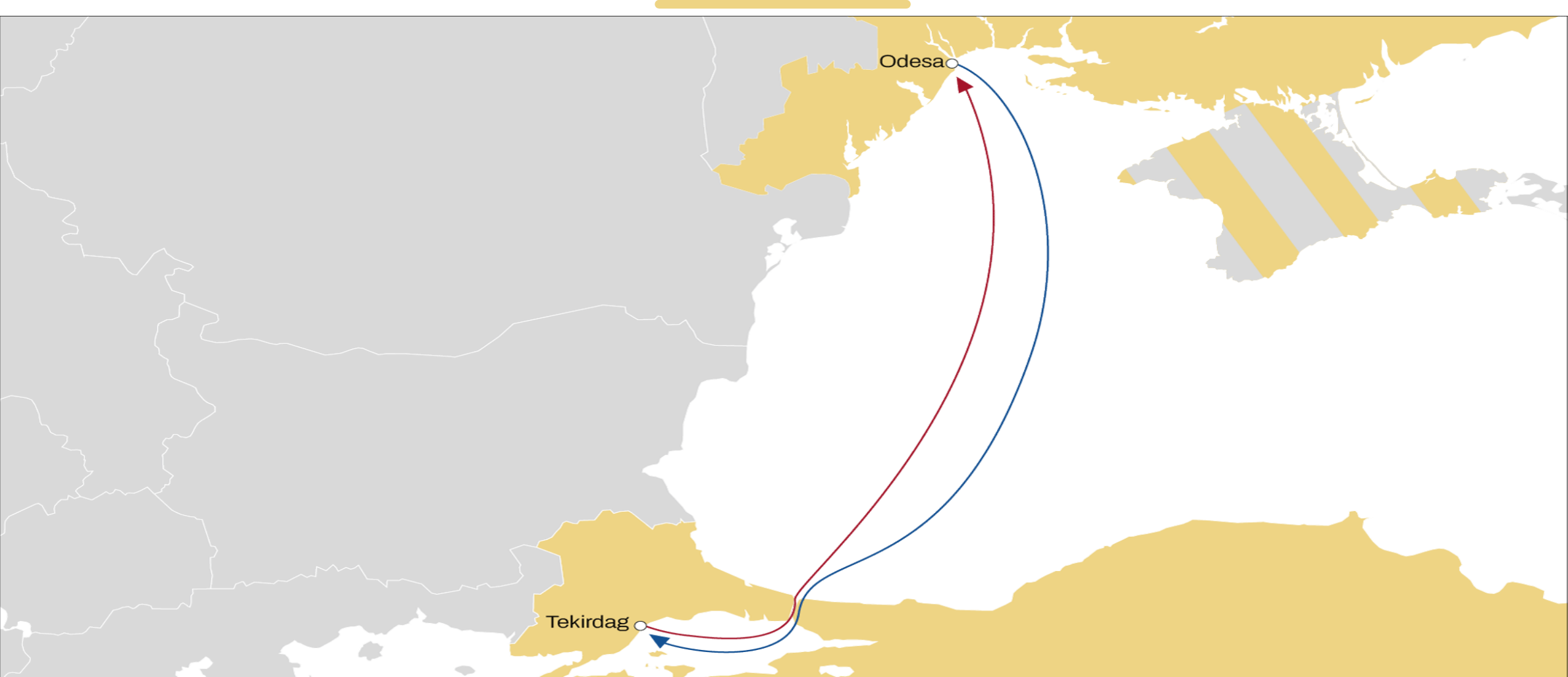


MSC SERVICES

TURKIYE TO NAF & BLACK SEA FEEDER



UKRAINE-TEKIRDAG SHUTTLE



MEDLOG POTI OFF-DOCK DEPOT

- 70,000 sqm
- 3 Gentry cranes and reach stackers
- Operating 24/7
- 2 R/W lane (Total: 1,100 m and operational 850 m)
- Only 300 m to port's gate
- Stripping / Stuffing / Cross Docking / Warehousing Solutions
- Container Storage / Plugging / PTI
- Project Cargo



MEDLOG BATUMI CFS

- 3,000 sqm closed warehouse & 18,000 sqm of open space
- 1 R/W lane (180 meters)
- Wide variety of forklifts
- Stripping / stuffing / cross docking / warehousing solutions



MSC IN CENTRAL ASIA

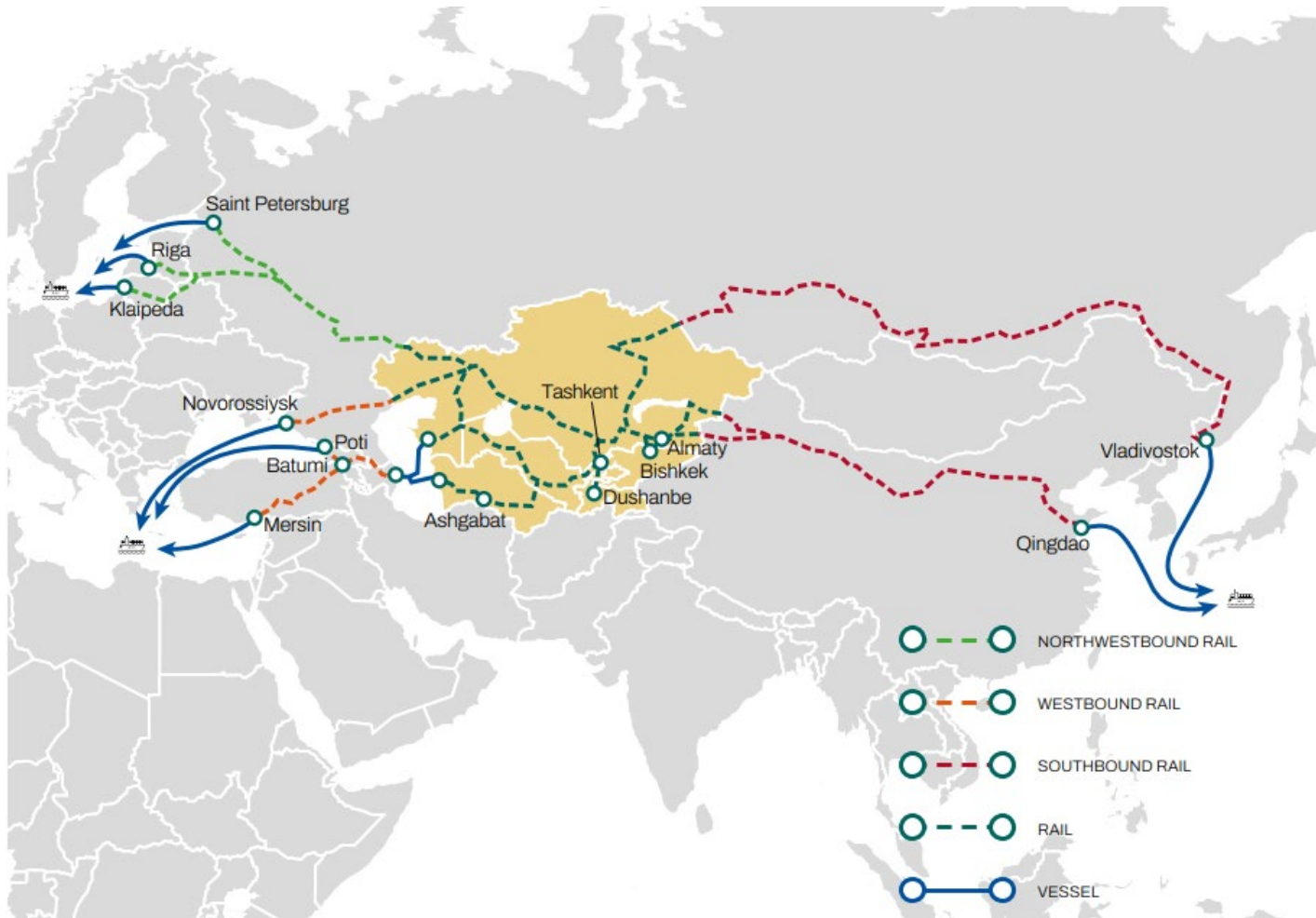


- Established in 2001
- Agencies in Kazakhstan and Uzbekistan
- 20+ employees

MSC in Central Asia provides multimodal solutions in five Central Asian countries: Kazakhstan, Uzbekistan, Kyrgyzstan, Tajikistan and Turkmenistan.

- Transportation of goods in dry containers, tank containers and flexi bags, and services for reloading cargo in ports.
- Handling of general, dangerous, and liquid cargo, as well as machinery, equipment, minerals, raw and construction materials, food products and many others.

CONNECTING CENTRAL ASIA TO THE WORLD



OUR MULTIMODAL SET-UP – SERVING YOUR NEEDS

5 MAIN GATES:

Baltic, Russia, China, Georgia, Turkey.

40+ MAIN RAILWAY STATIONS:

Kazakhstan, Uzbekistan, Kyrgyzstan, Turkmenistan, and Tajikistan.

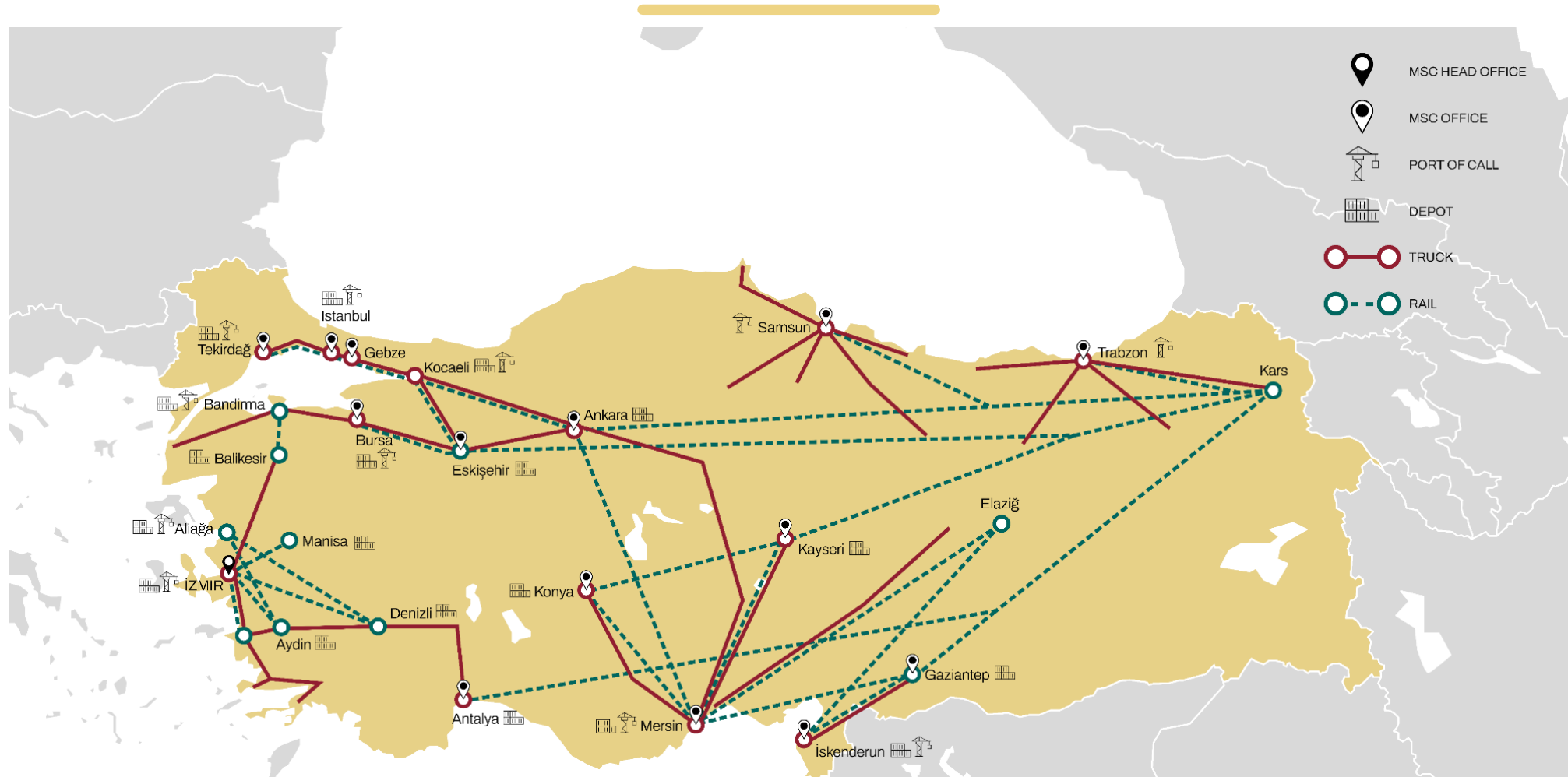
6 REGULAR TRAIN CONNECTIONS

to/from ports of Riga, Klaipeda, Qingdao, Poti, Batumi, Mersin.

CAUCASUS & CENTRAL ASIA CONNECTIONS



OUR INTERMODAL NETWORK IN TÜRKIYE



PRODUCT DEVELOPMENT - MSC IN PORT OF BAKU

- CLOSER TO THE MARKET
- EQUIPMENT AVAILABILITY
- SWIFT OPERATIONS
- SIMPLIFIED PROCESS



MIDDLE CORRIDOR-OPPORTUNITIES & CHALLENGES

- CONTAINERIZATION POTENTIAL
- SIMPLIFIED CUSTOMS REGIME
- DIVERSIFIED AND EXPERIENCED LOGISTICS INDUSTRY
- GOVERNMENT SUPPORT
- COST/TARIFF STABILITY
- CAPACITY AND TRANSIT TIME RELIABILITY
- ACCESSIBILITY
- LACK OF NGOs TO REPRESENT PRIVATE INDUSTRY

