

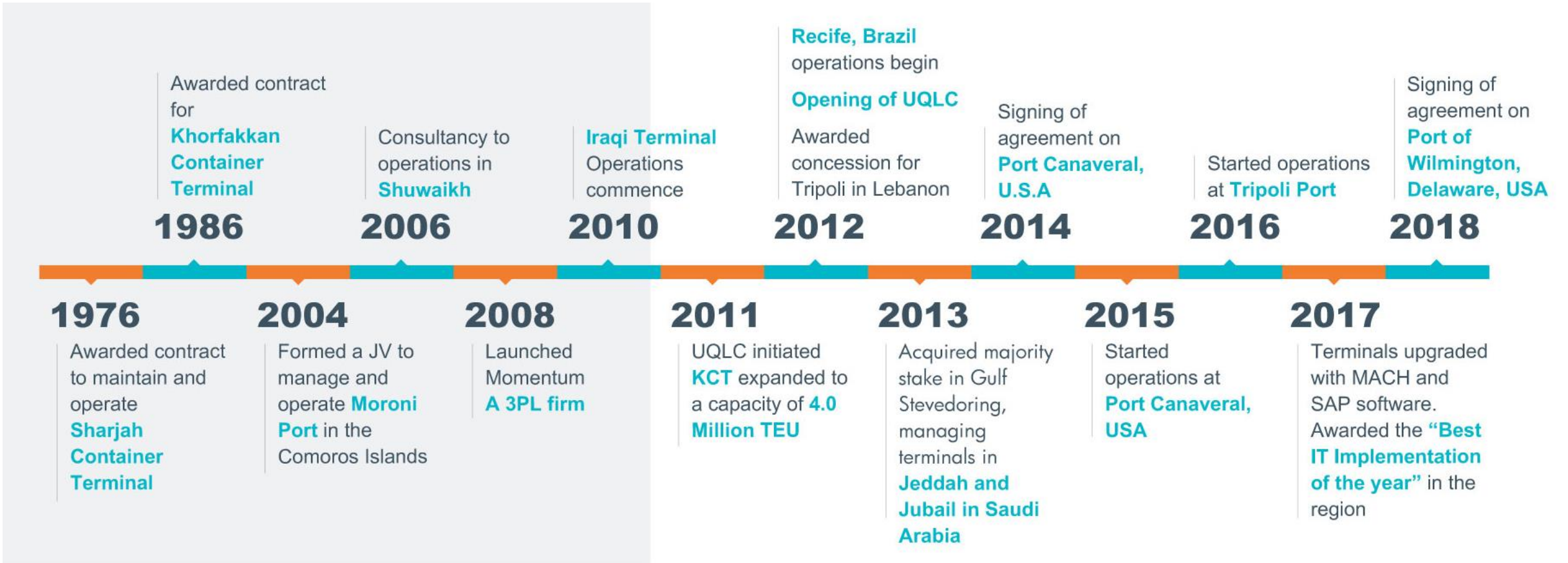
An aerial, blue-tinted photograph of a port or shipping yard. Numerous shipping containers are stacked in rows, and several large gantry cranes are visible, extending over the stacks. The scene is viewed from an elevated perspective, showing the layout of the port and the surrounding infrastructure.

RETAINING VALUE THROUGH IMPROVING SYNERGIES IN SUPPLY CHAINS

16th TRANS Middle
East Exhibition
Kuwait

31st January 2019

Gulftainer's Journey from Local to Global



What we do



International Port Management



Terminal Management



Logistics Cities



Container sales and repair services



Inland Transport



Inland Container Depot

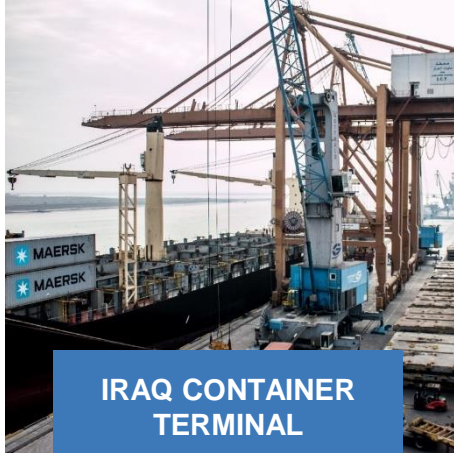
Terminals



**KHORFAKKAN
CONTAINER TERMINAL**



**SHARJAH CONTAINER
TERMINAL**



**IRAQ CONTAINER
TERMINAL**



**IRAQ PROJECTS
TERMINAL**



**MOMENTUM
IRAQ**



**LEBANON – PORT
OF TRIPOLI**



**JEDDAH
PORT**



**JUBAIL
COMMERCIAL PORT**



**USA – PORT
CANAVERAL**



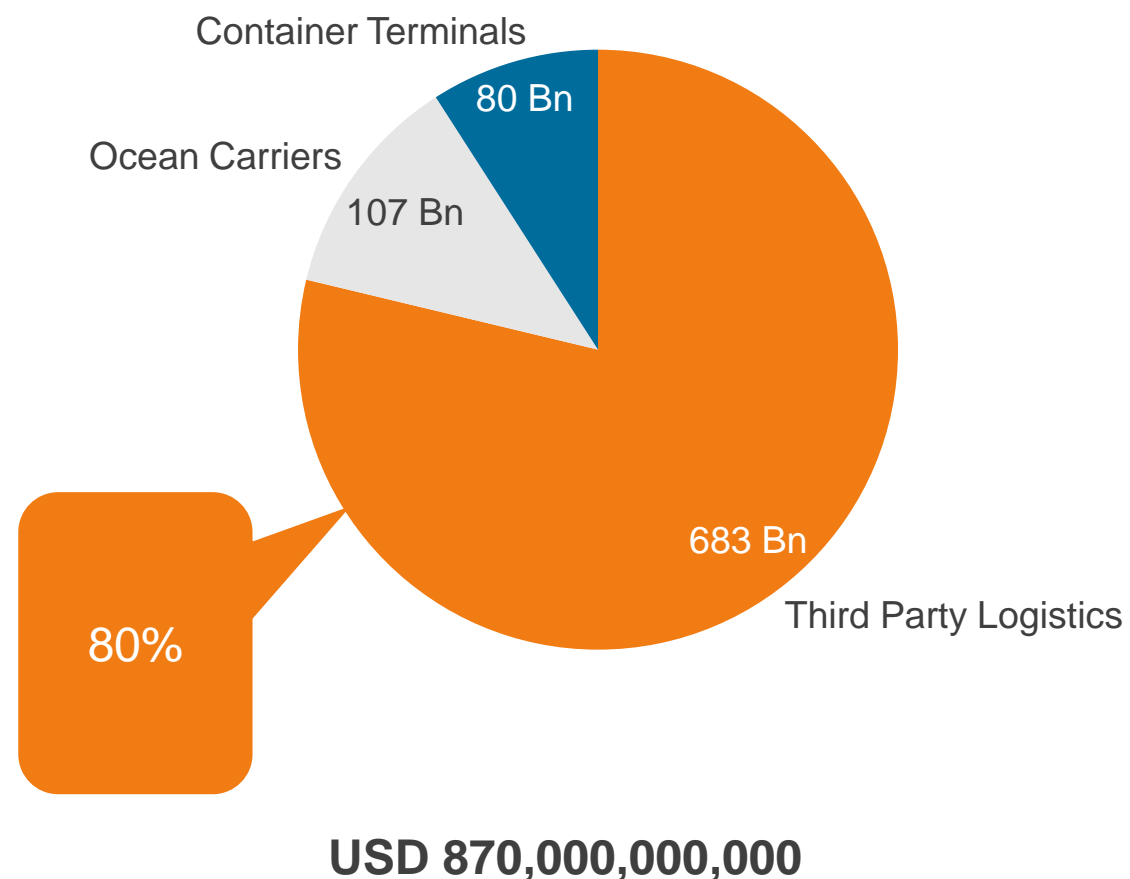
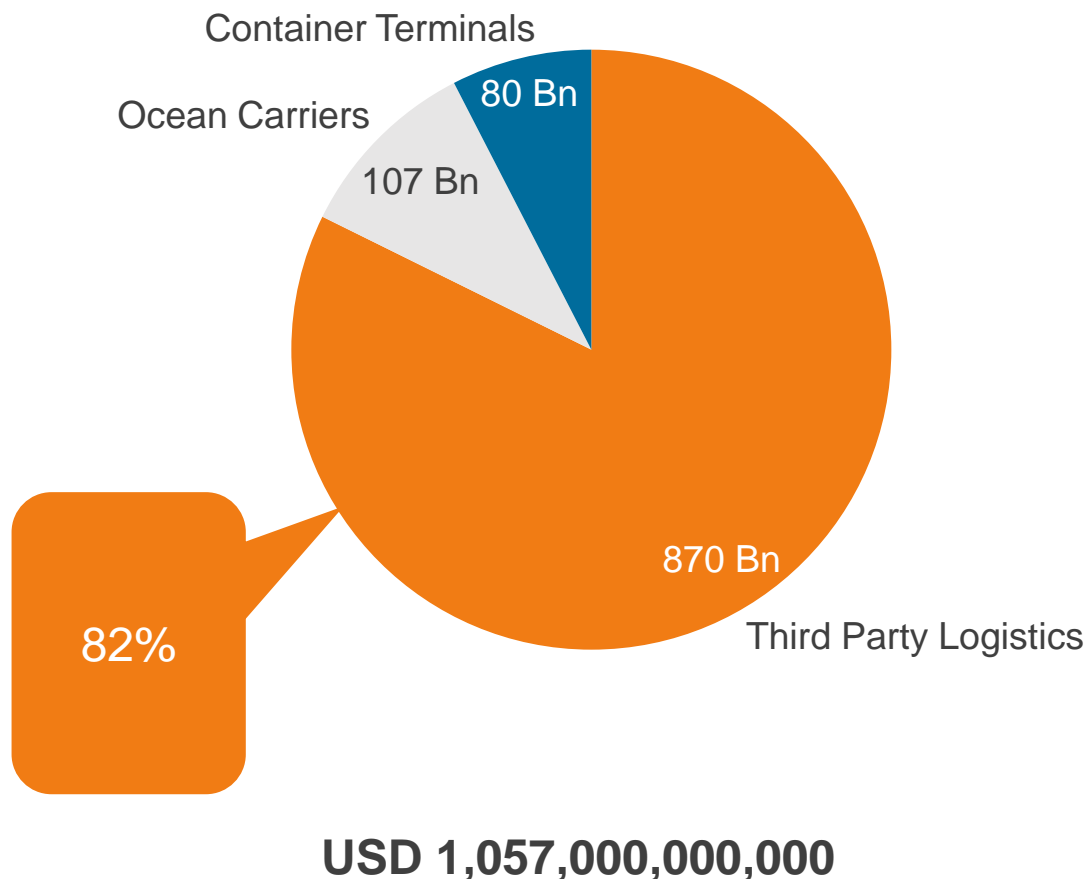
**USA – PORT OF
WILMINGTON**

INDUSTRY RECOGNITION

- World's largest privately owned, independent port operator
- Since 1976
- First dedicated container terminal in the Middle East
- JOC – Khorfakkan: **Fastest Terminal** in the Middle East, Africa & Europe
- Lloyds List – Khorfakkan: **'Middle East Port of the Year'** 2015
- SCATA – Khorfakkan: **'Shipping Port of the Year'** 2015
- Seatrade – **'Port Operator of the Year'**, ME / ISC 2016
- Seatrade – **'Port Operator of the Year'**, ME / ISC 2017
- Logistics Middle East – **'Best Tech Implementation'** 2017
- MEED – **'Wellness Programme'** 2017
- Logistics Middle East – **'Best CSR Policy'** 2018

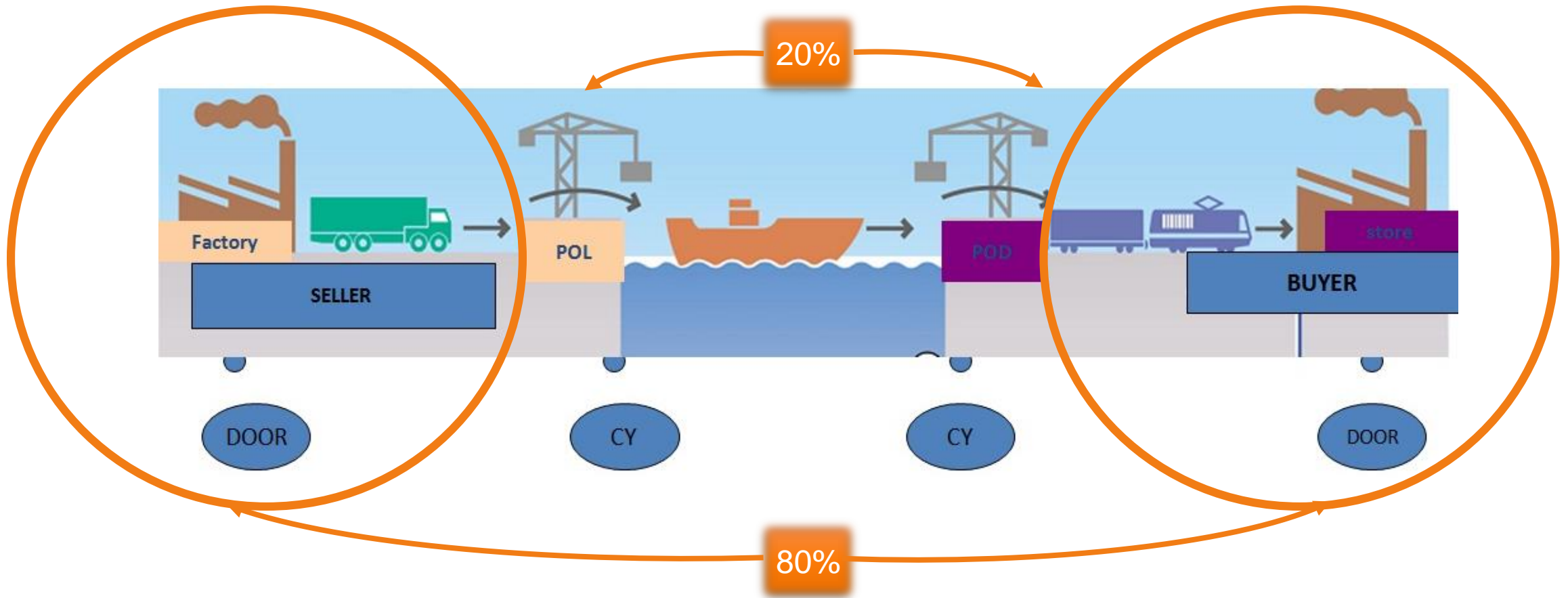
Follow the money

Logistics and ocean transport turnover

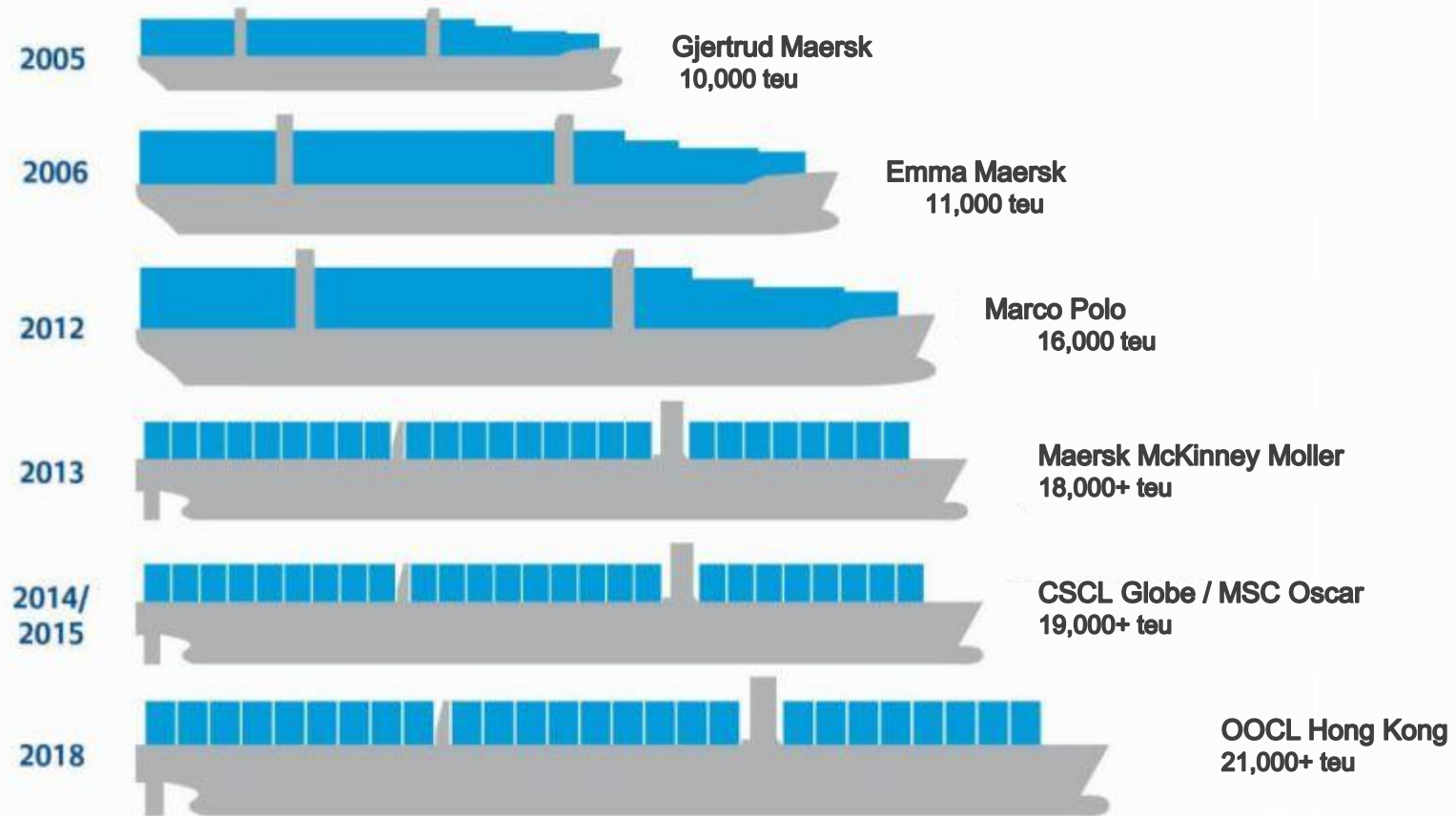


Follow the money

Logistics and ocean transport turnover



Average vessel sizes have continued to increase...



Unit costs remain significant...



~\$M 150
Cost of new ULCC

... and loops have grown...



Shanghai to Hamburg 2009

Vessel speed 24.5 kts

Rotation: 63 days

Vessels: 9



Shanghai to Hamburg 2019

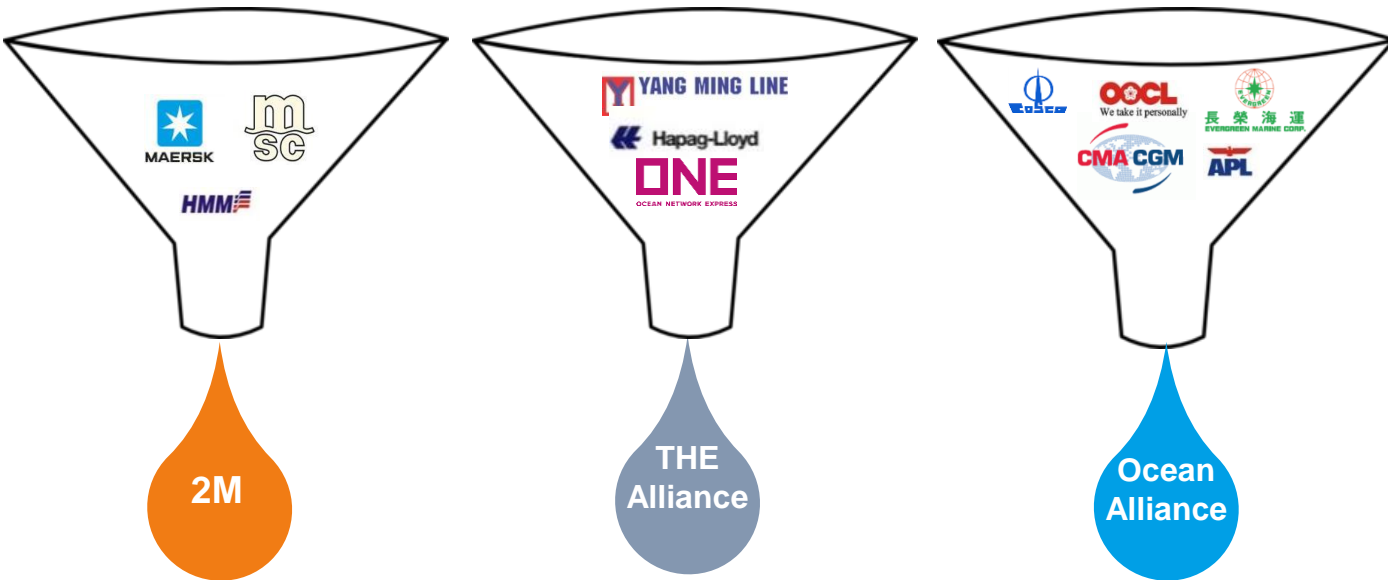
Vessel speed 14.5 kts

Rotation: 77 days

Vessels: 11

... hugely increasing cost of competitiveness

Other Key Driver of the Industry: Global Alliances



2011:

- 3 Alliances
 - Grand Alliance
 - CKYH
 - New World Alliance
- Combined Market Share:

29%

2018:

- 3 Alliances
 - 2M
 - THE
 - Ocean Alliance
- Combined Market Share:

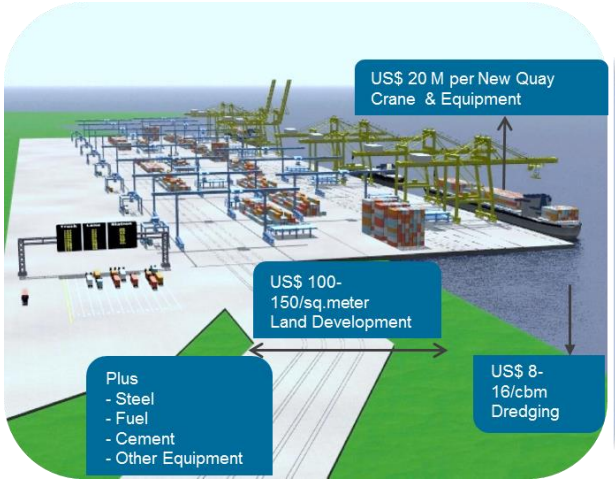
80%

- Combined Market Share on East-West Trade:

95%

Terminals having to invest heavily with changing business environment

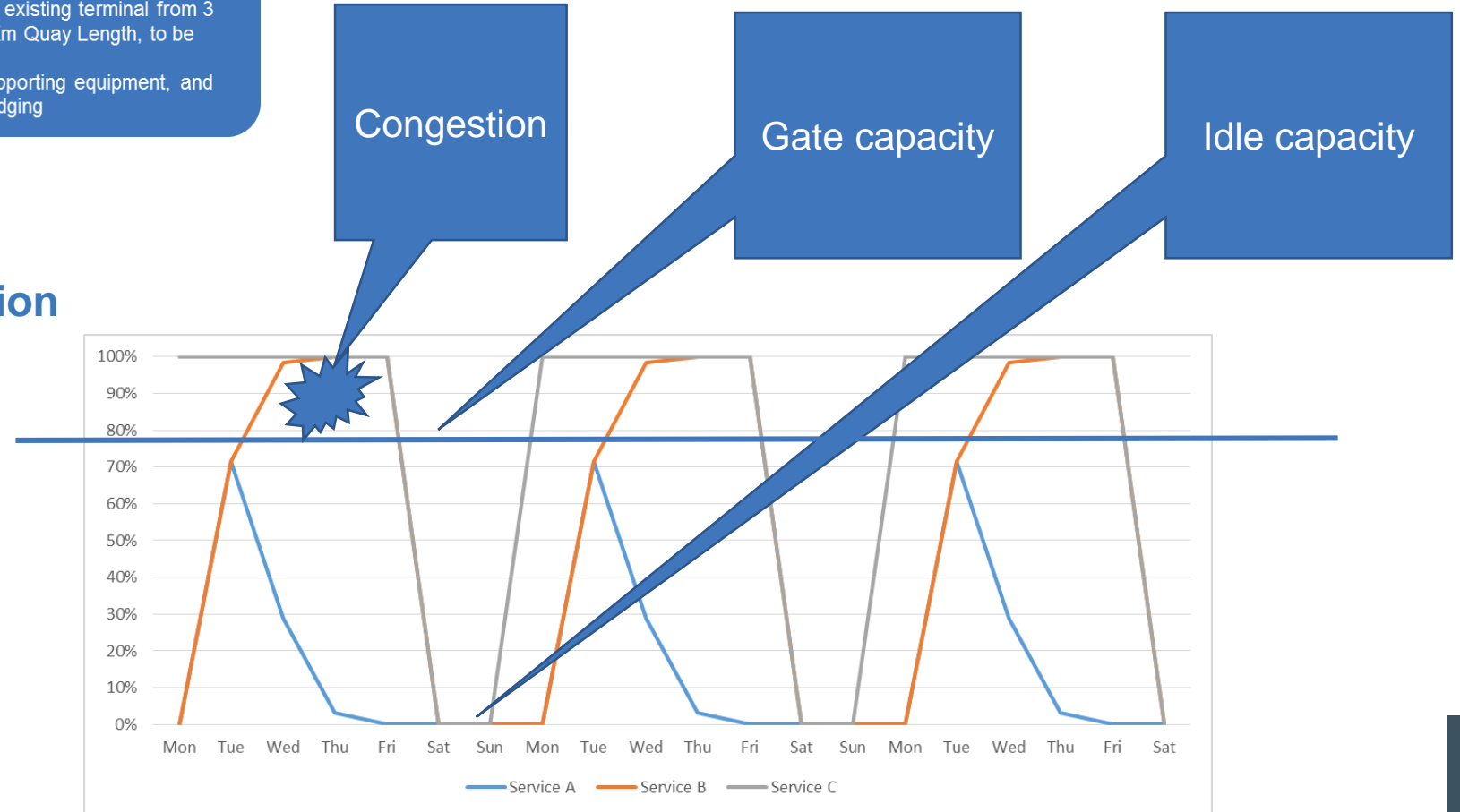
Larger Vessels – Larger Investment for Infrastructure



~\$M 120

To upgrade an existing terminal from 3 berths with 1 Km Quay Length, to be ULCC-ready: 6 STS, and supporting equipment, and 2M cbm of dredging

Larger Parcels – Greater Congestion

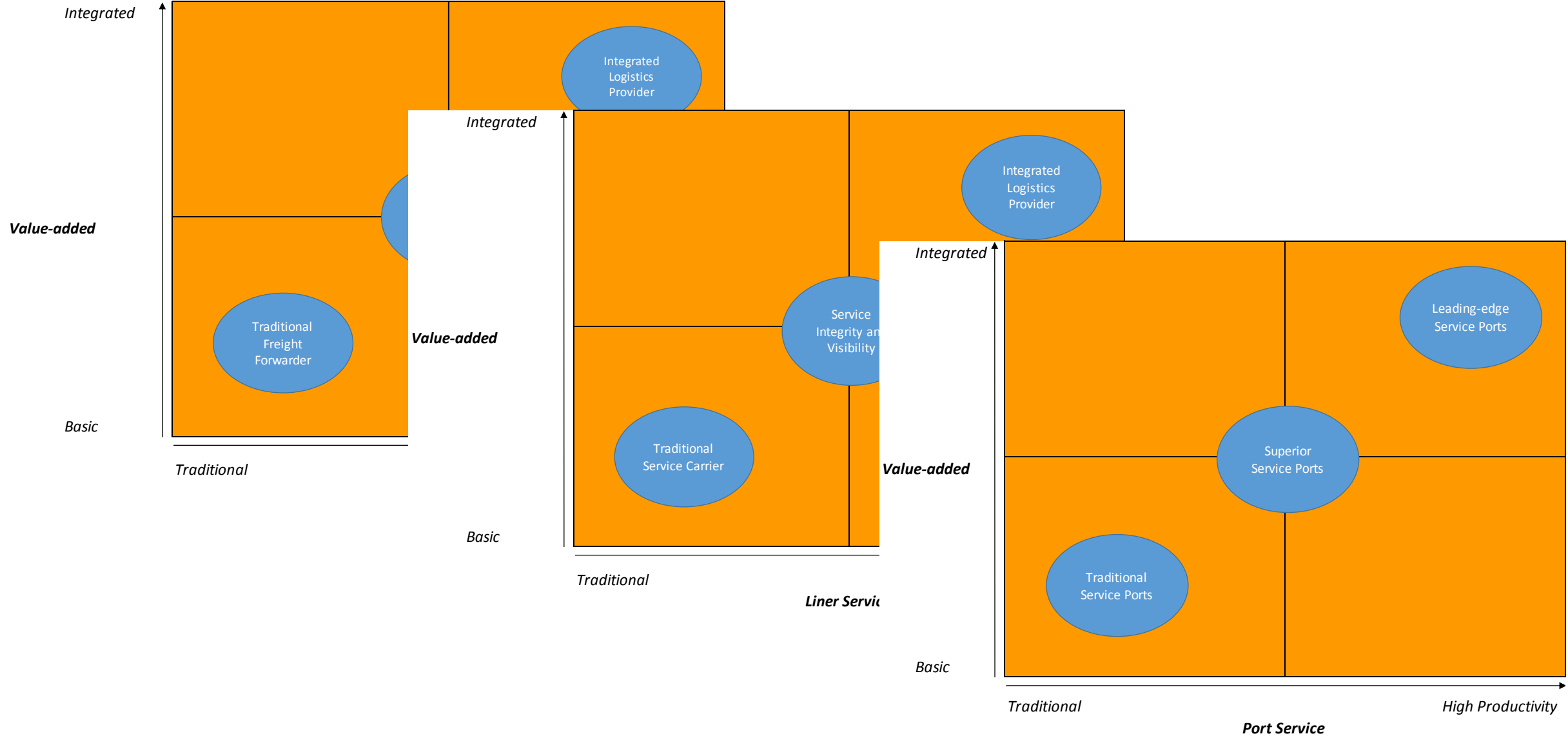


A blue-tinted photograph of a busy port. In the foreground, a forklift is visible. In the background, a large cargo ship is docked at a pier, with the name 'CMA CGM MARGRIT' visible on its side. The image is overlaid with a semi-transparent blue filter.

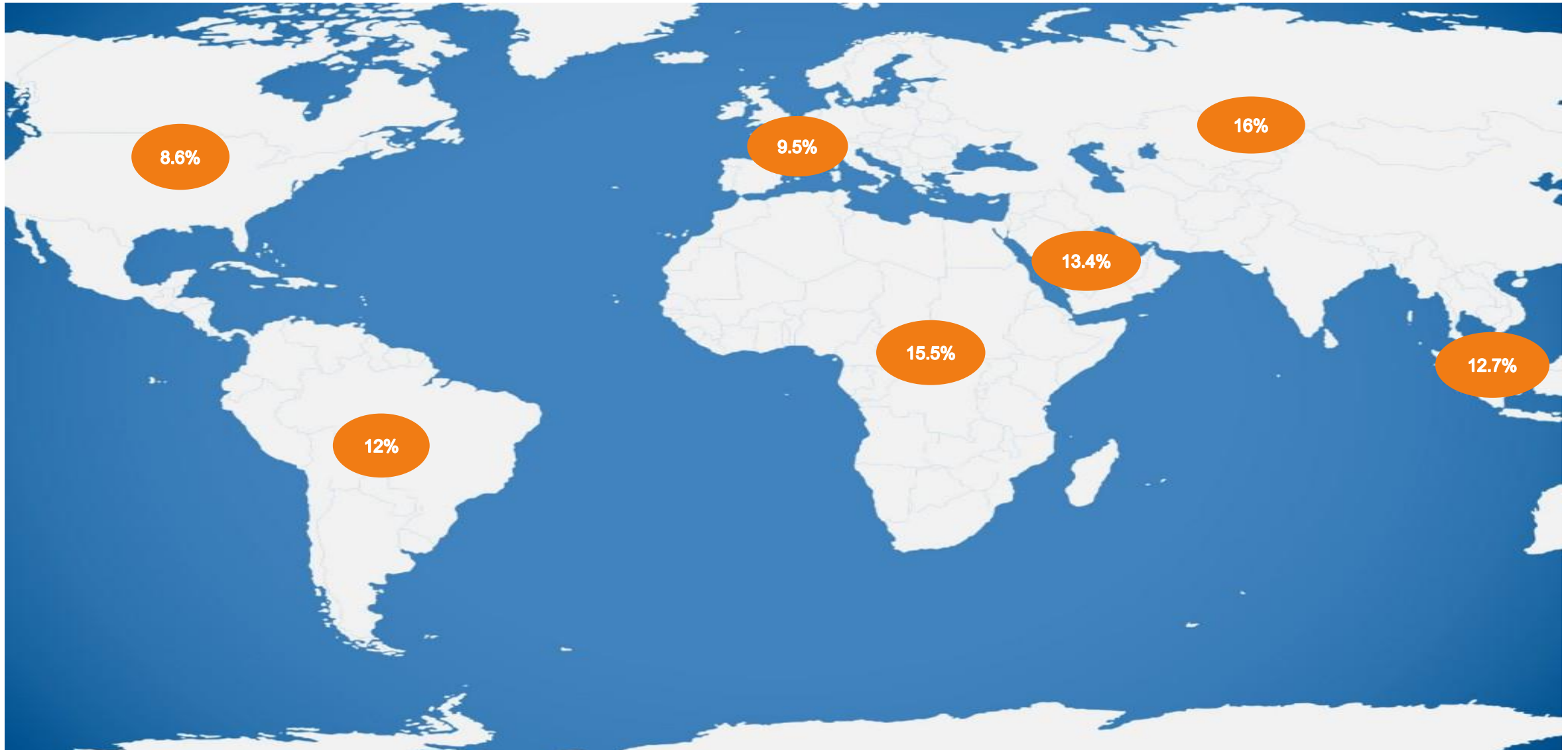
CO-OPERATE?

OR COMPETE?

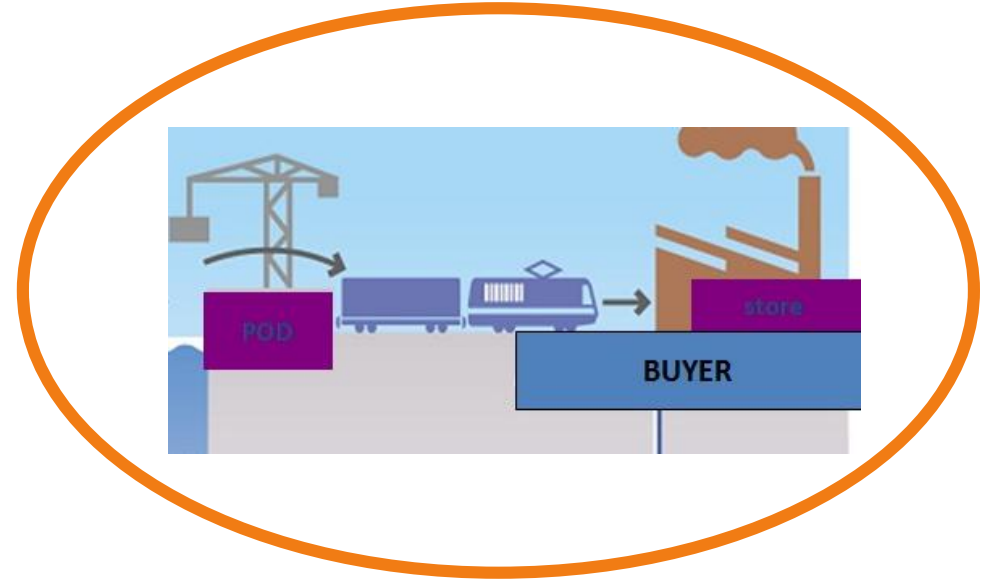
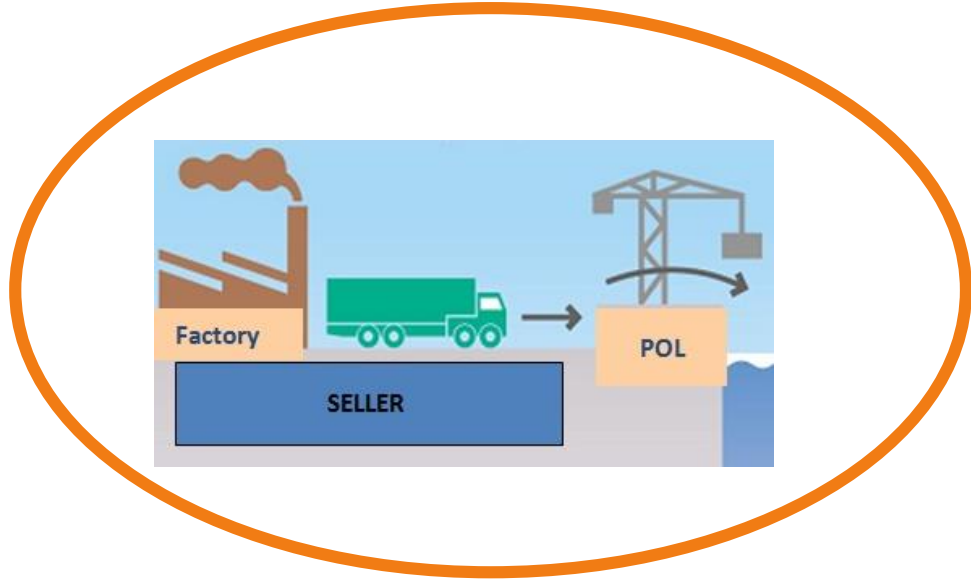
Changing roles: from traditional services to value-added logistics services



Logistics efficiency and economic impact



Landside Integration?



Ships and Cargo where they want to be





THANK YOU

Gulftainer Operations

- Terminal Management
- Supply Chain Management
- Container Repair
- International Port Management
- Inland Container Depot
- Inland Transport
- Logistics Cities

Iain Rawlinson

+971 56 680 3541
irawlinson@gulftainer.com

Website: www.gulftainer.com