



A Reflection on Investment Opportunities in Iranian Ports Sector

Tehran, 24 January 2017

Babak Banijamali

DARYA-BANDAR CONSULTANTS (DBC)

- Introduction to Darya-Bandar Consultants (DBC)
- A brief recap of Iran's investment indices, not yet feeling the sanctions relief – kept short to avoid overlap with other presentations
- Ports Administration & Investment –noteworthy to differentiate between various traditional Developers/Owners' individual practices inside Iran
- Investment opportunities at Amirabad Port: A strategic 3rd generation port by the Caspian, vital for the ECO/CIS countries with its rail-ferry terminal achieving rail connectivity for NOSTRAC related transit as well as other key regional functions (Brownfield)
- Investment opportunities at Makran Mother Port: A mega industrial park/petrochemical plant/cargo transit/bunkering port project by the Makran coast, earmarked within the current Iranian national 4 yearly development plan as a top regional development priority with major incentives currently being offered to overseas investors (Greenfield)

ABOUT DARYA-BANDAR CONSULTANTS (DBC)



- The first ports & marine structures consultancy firm inside Iran, originating from an Iranian-European owned company in the early 1970s.
- Responsible for preparation of the masterplans of major Iranian commercial, multi-purpose and specialized ports, commencing from greenfield projects & sustained involvements in subsequent development phases.
- Ports related Management Consultancy services, including for the following governmental ministries & organizations:
 - Ministry of Roads & Urban Development/Ports & Maritime Organization (PMO);
 - Ministry of Petroleum;
 - Ministry of Industry, Mines & Trade;
 - The Supreme Council of Iran's Free Trade, Industrial & Special Economic Zones;
 - Iranian Fisheries Organization (IFO);
- Recent international cooperation examples in ports sector include:
 - Chabahar Port with TATA for India Ports Global Private Limited (IPGPL)
 - North-Pars Port for Chinese National Offshore Oil Company (CNOONC)



Key Indicators

Area	(Million km ²)	1.65
Population	(Millions)	77.74
Non-Oil Export	(\$US Billion)	(62)
Import (FOB)	(\$US Billion)	(52)
Foreign trade volume		(\$US Billion) (114)

*21 March 2014 – 21 March 2015

Persian Gulf

Gulf of Oman



Capacity of Iranian Ports



Total capacity of 14 Iranian commercial ports currently stands at some 128 million tons of cargo annually and the yards cover an area of 42 square kilometers

Overview

**7 Free Trade-Industrial Zones
30 Special Economic Zones**

- ❑ Advantageous Geographical Locations
- ❑ Modern Infrastructure & Equipment
- ❑ Foreign Investment Incentives

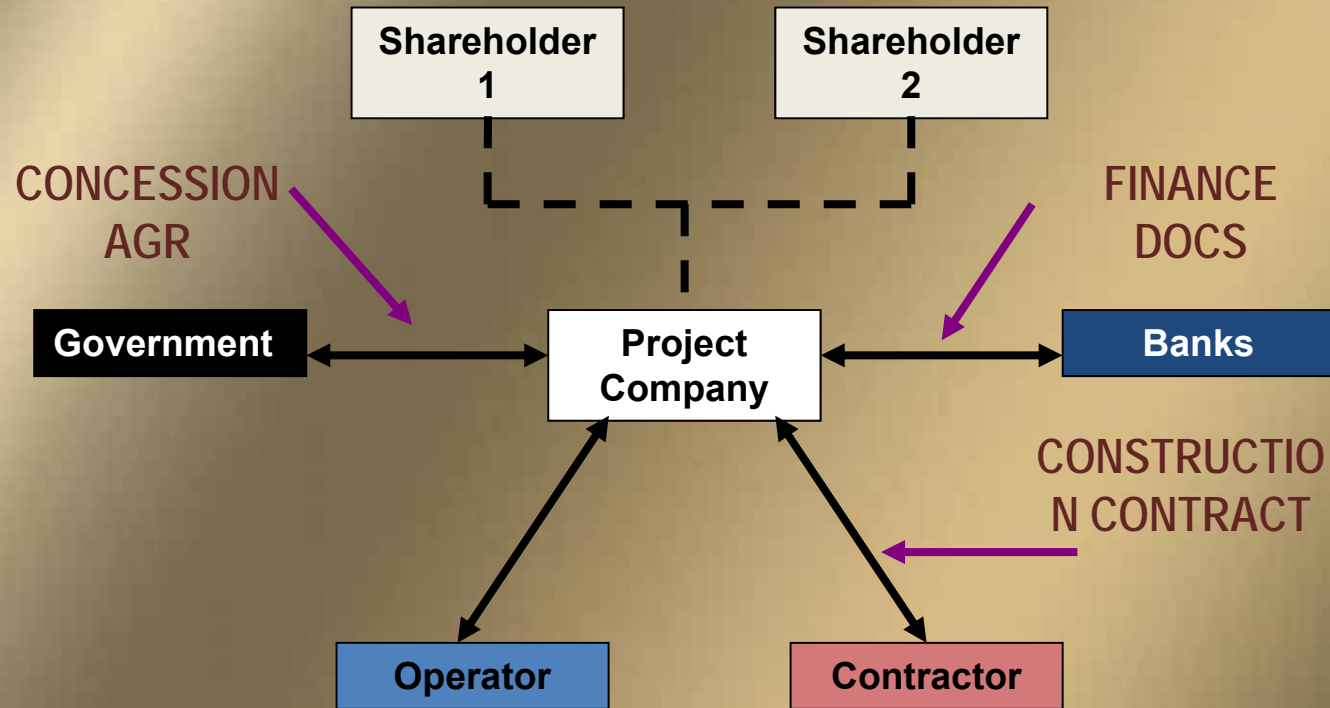


BASIC PORT MANAGEMENT MODELS



Type	Infrastructure	Superstructure	Port Labor	Other Functions
Public Service Port	Public	Public	Public	Majority Public
Tool Port	Public	Public	Private	Public/Private
Landlord Port	Public	Private	Private	Public/Private
Private Service Port	Private	Private	Private	Majority Private

THE "TYPICAL" PROJECTS STRUCTURE



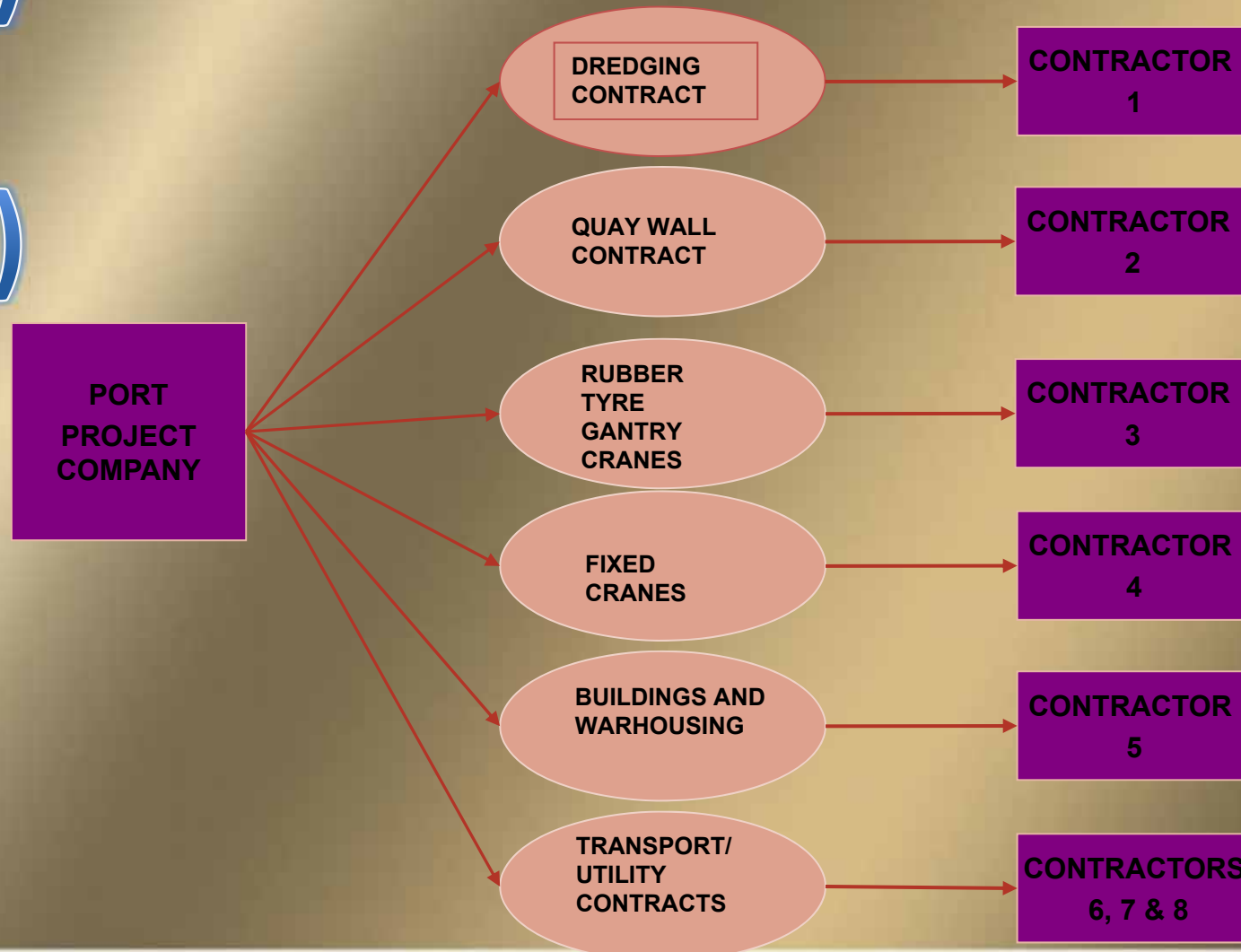
CONTRAST BETWEEN 2 TYPICAL PORT DEVELOPMENT SCHEMES: INTERFACE RISKS



A)



B)



Amirabad port Special Economic Zone

بنادر و دریانوردی و منطقه ویژه اقتصادی امیرآباد



1. The biggest port north of Iran
2. The third largest port area-wise
3. The only Iranian port to have a modern Rail Ferry terminal as well as RO-RO facility
4. Located ideally to suit the North-South trade corridor
5. Major grain handling port north of Iran
6. The only third generation port



1. بزرگترین بندر در شمال کشور

2. سومین بندر به لحاظ وسعت

3. تنها بندر دارای اسکله رورو

ریلی

4. قرارگرفتن در مسیر کریدور

شمال جنوب

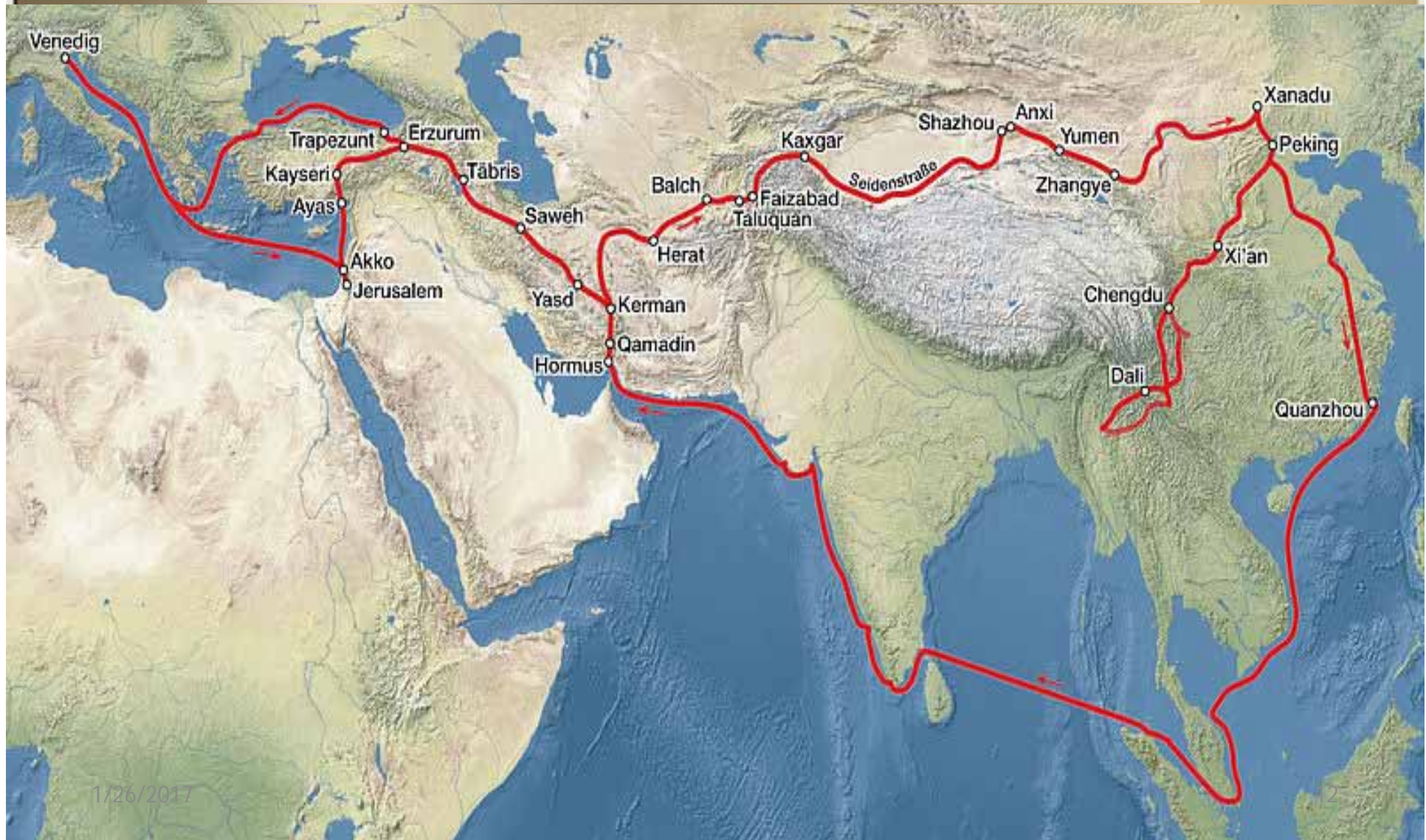
5. پایلوت غلات در شمال کشور

6. تنها بندر نسل سوم

ECO TRADITIONAL TRANSIT TRANSPORT CONNECTIVITY



Map of [Marco Polo](#)'s travels in 1271–1295



CROSSING TO NORTH- SOUTH INTERNATIONAL CORRIDORS



حلقه اصلی کریدور
«شمال - جنوب»



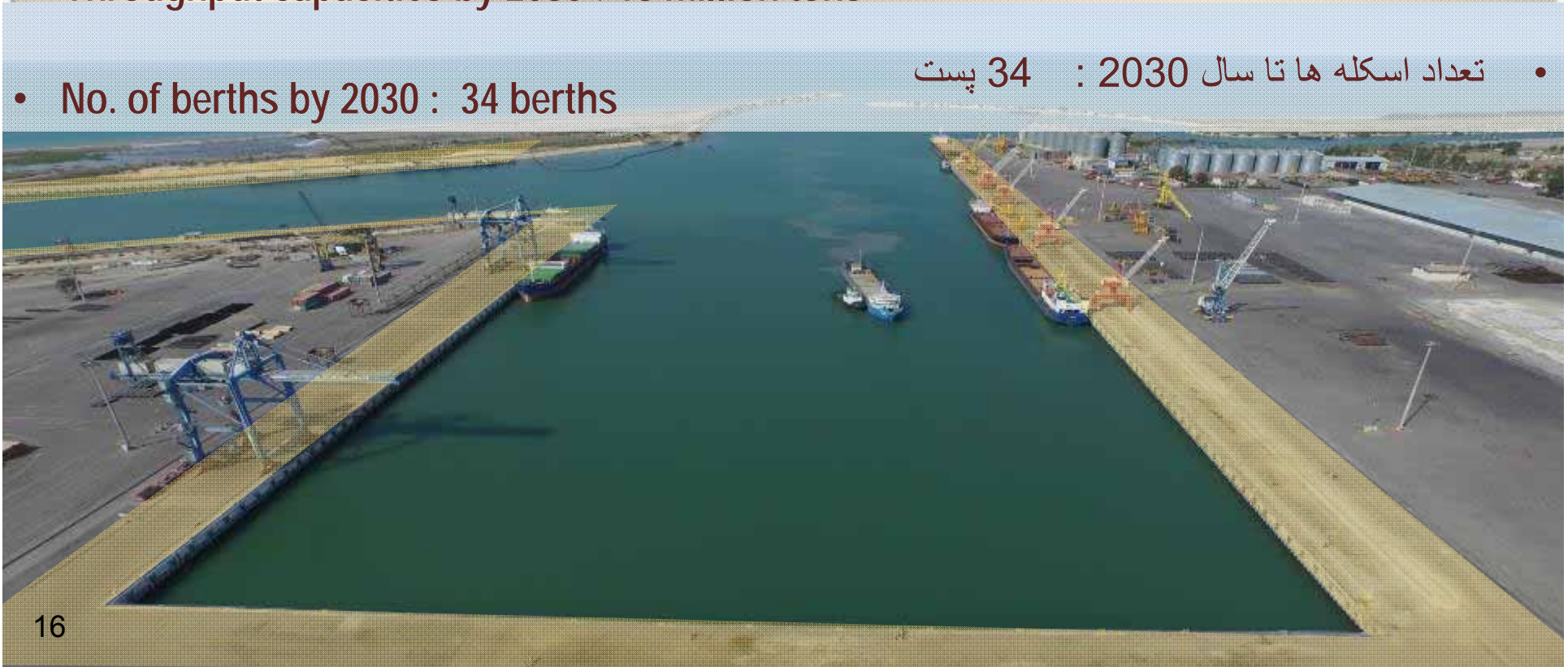
KAZAKHSTAN- TURKMENISTAN – IRAN RAIL CONNECTIVITY



MAJOR MARICULTURE PROSPECTS



- ظرفیت عملیاتی بندر : 7/5 میلیون تن
- Throughput capacities : 7.5 million tons
- ظرفیت عملیاتی بندر تا سال 2030 : 18 میلیون تن
- Throughput capacities by 2030 : 18 million tons
- تعداد اسکله ها تا سال 2030 : 34 پست
- No. of berths by 2030 : 34 berths



CARGO FLOW WITH OTHER COUNTRIES IN 2016 -27 DEC



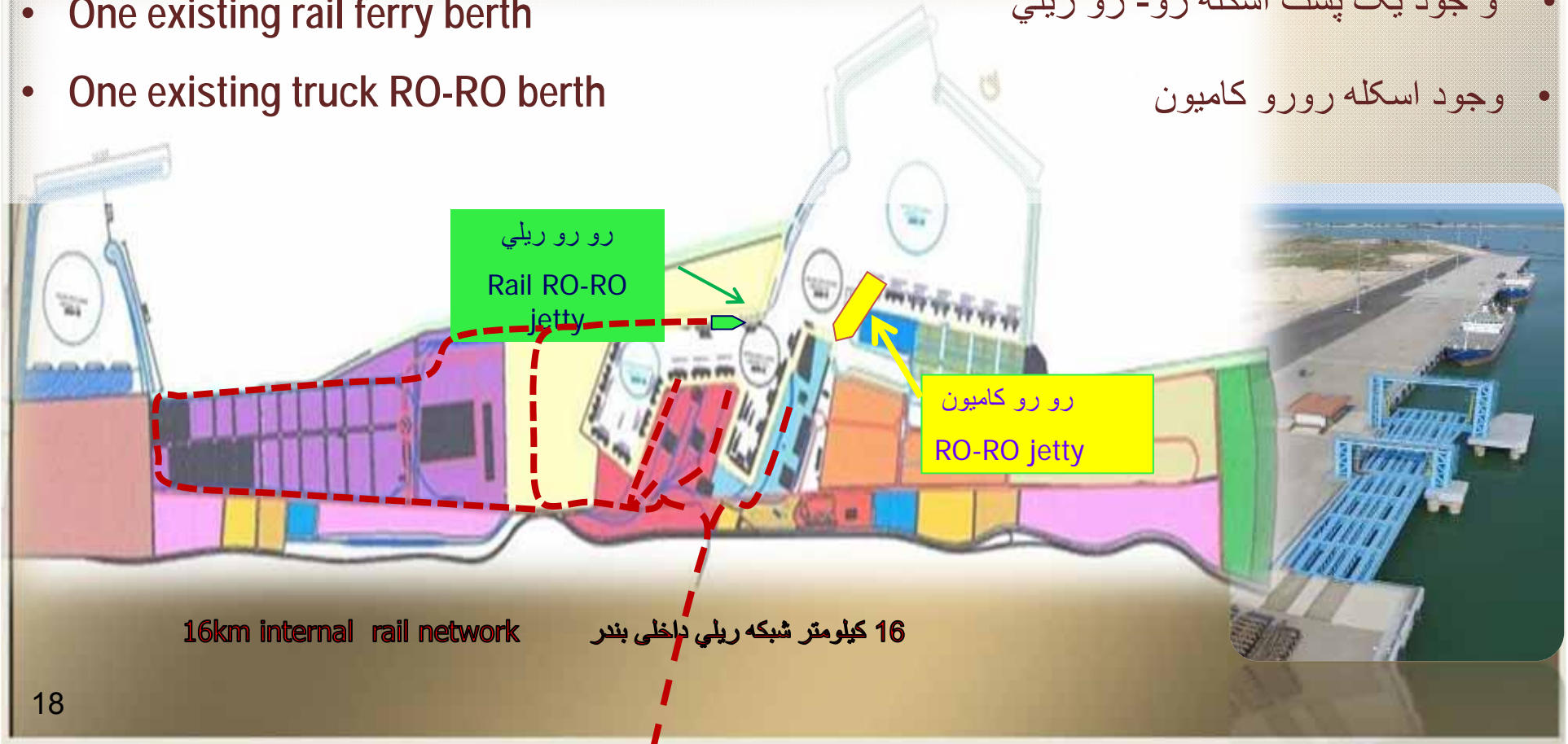
تبادل کالا بین امیرآباد و سایر کشورها
در سال 2016 تا تاریخ 27 دسامبر

Country	2016	
	TONS	percentage
Russia روسیه	1,088,676	47%
Kazakhstan قزاقستان	811,990	35%
Azerbaijan آذربایجان	253,021	11%
Turkmenistan ترکمنستان	157,264	7%
Total جمع	2,310,951	100%



- Only Northern Iranian port connected to rail network with bogey exchange/shunting yard
- 16 km inter-port rail network
- One existing rail ferry berth
- One existing truck RO-RO berth

- تنها بندر شمالی متصل به شبکه ریلی کشور
- وجود 16 کیلومتر شبکه ریلی داخلی
- وجود یک پست اسکله رو-رو ریلی
- وجود اسکله رورو کامیون



- انبار سر پوشیده به مساحت 6/5 هکتار

Warehouse: 6.5 hectares

- انبار روباز به مساحت 200 هکتار

Cargo storage area: 200 hectares



Warehouse areas soon to reach 7.5 hectars

انبار سر پوشیده در حال افزایش به 7/5 هکتار

• ظرفیت سیلوی غلات 170 هزارتن

Grain silo capacity: 170,000 Tons



Silo capacity soon to reach : 500,000 Tons

ظرفیت سیلو در حال افزایش به : 500 هزار تن

• ظرفیت مخازن نگهداری فرآورده های نفتی 16,000 متر مکعب

- Oil storage capacity: 16,000 m^3



• ظرفیت مخازن نگهداری روغن خوراکی : 5,000 متر مکعب

- **Vegetable oil tank farm capacity: 5,000 m³**



NEW SOFTWARE FOR CARGO HANDLING



تکنولوژی روز جهت عملیات تخلیه و بارگیری



- سیستم مکانیزه گردش کالا در بندر (Gcoms)
- تجهیزات مکانیزه Online بارشماری (Hand Held)
- تجهیزات مکانیزه Online تشخیص مواد رادیو اکتیو
- General cargo operation management system
- Hand held equipment
- Radioactive identification equipment



PORT STRATEGIC EQUIPMENT



تجهيزات استراتژیک بندری



جرثقیل موبایل ساحلی 3 دستگاه

3x Mobile Harbor Cranes (MHC)



جرثقیل های ریلی 6 دستگاه

6x Rail-mounted Cranes



گنتری کرین 2 دستگاه

2x STS Gantry Cranes



ریچ استاکر 1 دستگاه

1x Reach Stacker



مکنده غلات 13 دستگاه

13x Pneumatic Grain Unloader



ترانسینر 1 دستگاه

1x RTG

MARINE STRATEGIC EQUIPMENT
(TO BE SUPPLEMENTED)



تجهيزات استراتژیک دریایی



2 فروند راهنما بر
2 pilot boats



1 فروند قایق جستجو و نجات
1 search and rescue vessel



5 فروند یدک کش
5 tug boats



1 فروند لایروب
1 dredger

Investment opportunities in Amirabad PORT (Special Economic Zone)

- Fuel transit activities such as tank farm establishment
- Container & vehicle transit activities with CIS countries
- Activities related to steel industry
- Projects related to wood & paper industries
- Export of various minerals

اولویت های سرمایه گذاری در منطقه ویژه اقتصادی امیرآباد

- فعالیت ها ترانزیتی سوخت اعم از احداث مخازن
- فعالیت های ترانزیتی کانتینر و خودرو به مقصد کشور های حوزه CIS
- فعالیت های مرتبط با صنایع فولاد
- فعالیت های مرتبط با چوب و کاغذ
- فعالیت های صادراتی مواد واسطه ای معدنی

OPERATIONAL PRIVATE INVESTMENTS



پروژه های سرمایه گذاری بخش
خصوصی - در حال بهره برداری



CAPACITY ظرفیت پروژه	No.s مورد	PROJECTS موضوع
75 MW	1	Powerplant نیروگاه برق
20,000 M2	4	Warehouse/انبار
800,000 TONS/y	1	Rebar factory تولید انواع میلگرد

OPERATIONAL
PRIVATE INVESTMENTS (CONT.)



پروژه های سرمایه گذاری بخش
خصوصی - در حال بهره برداری

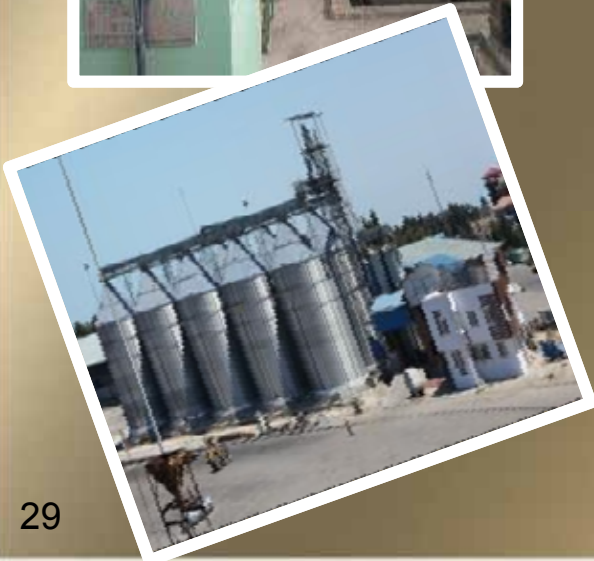


CAPACITY ظرفیت پروژه	No.s مورد	PROJECTS موضوع
3,500 TONS	1	Fruit sorting & refrigerator سردخانه و سورتینگ و بسته بندی
170,000 TONS	5	SILO/سیلو
16,200 M3	1	Oil Storage Tank farm مخازن نفتی
300 TONS/Day	1	Gypsum factory کارخانه تولید گچ صادراتی
5,000 TONS	1	Vegetable oil tank farm مخازن روغن خوراکی

INVESTMENTS TO BE OPERATIONAL SHORTLY



پروژه های سرمایه گذاری بخش
خصوصی - در مرحله ساخت



CAPACITY ظرفیت پروژه	No.s مورد	PROJECTS موضوع
112,500 TONS/ Y	1	Paper factory تولید کاغذ
700,000 TONS/Y	1	Steel products factory تولید کلاف فلزی
270,000 TONS/ Y	1	MDF Factory کارخانه تولید MDF
36,000 TONS	2	Oil Storage Tank farm مخازن نفتی
250,000 TONS	5	SILO/ سیلو
10,000 M2	2	Warehouse/ انبار
45,000 TON/Y	1	Flour factory کارخانه تولید آرد

MAKRAN MOTHER PORT: A RARE GREENFIELD PROJECT



ASPECTS OF THE MAKRAN MOTHER PORT:



- An advantage of an industrial park established within the proposed free trade zone is its proximity to available energy resources as well as being located on the famous silk route allowing easy access to central Asian states
- Investment possibilities independently or in partnership with Iranian entities with no limit on investment and shareholding
- Foreign investments up to any ratio (of capital investment)
- Proposed 20 years of all tax exemption
- Governmental investment guarantees
- Offshore banking and non-banking crate practices.
- Proposed 100% free repatriation of capital and profit at any time.
- Vast pool of manpower at all levels of skill and business-friendly trade and employment regulations
- Proposed relaxation of visa requirements for foreign nationals
- Tax exemption for export of manufactured commodities into the mainland
- Access to deep waters & being located very close to international shipping routes
- Existence of gas pipelines
- Existence of storage facilities and oil jetty (crude & oil products)
- Strategic location (by the export corridor of a large percentage of global fossil fuels)

Industries Planned at Makran industrial park

<i>Description</i>	<i>Capacity</i>	<i>Gas (M m³/yr)</i>	<i>Electricity (M kw/hr)</i>	<i>Water (M m³/yr)</i>
Steel	5 (MT/yr)	1750	4250	25
Aluminum	600,000 (T/yr)	36	5400	3
Ferrochrome	50.000 (T/yr)	1.2	58.4	1
Petrochemicals	5 (MT/yr)	4750	215	2.2
Power Plant	2000 (MW)	2920	-	0.7
Magnesium	6.000 (T/yr)	10	31	0.4
Titanium	50.000 (T/yr)	0.11	18	0.13



NIOTC

- 01 - PETROCHEMICALS EXPORT
- 02 - PETROCHEMICALS EXPORT
- 03 - PETROCHEMICALS EXPORT
- 04 - TUGS & SERVICE CRAFTS
- 05 - ORES IMPORT
- 06 - ORES EXPORT
- 07 - ALUMINA IMPORT
- 08 - STEEL & ALUMINIUM PRODUCTS EXPORT
- 09 - STEEL & ALUMINIUM PRODUCTS EXPORT

JFTZ

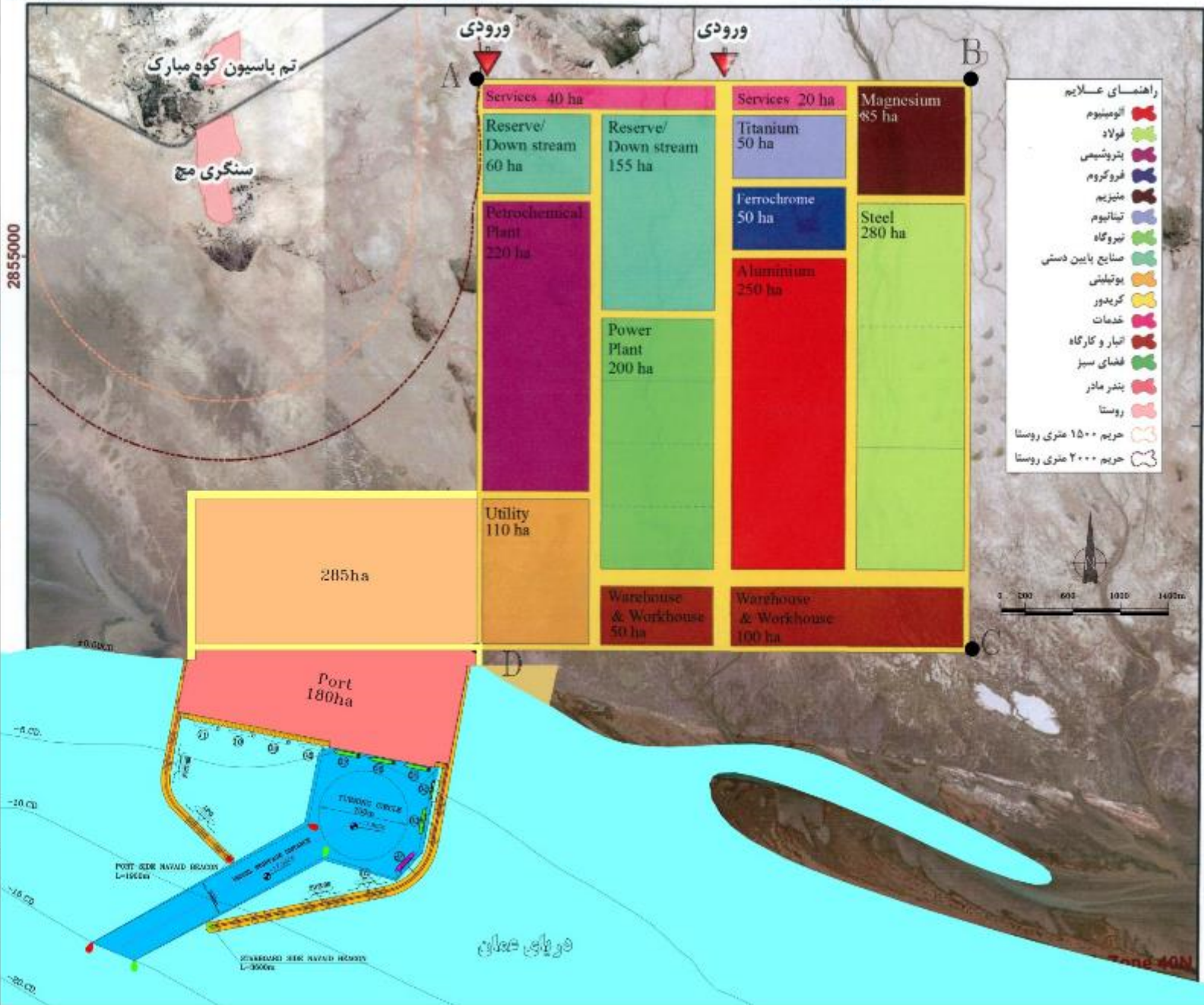
- 10 - MULTI-PURPOSE
- 11 - MULTI-PURPOSE

جائزایی اولیه موقعیت شهرک صنعتی
و بندر جاسک

57°20'0"E

57°22'0"E

57°24'0"E

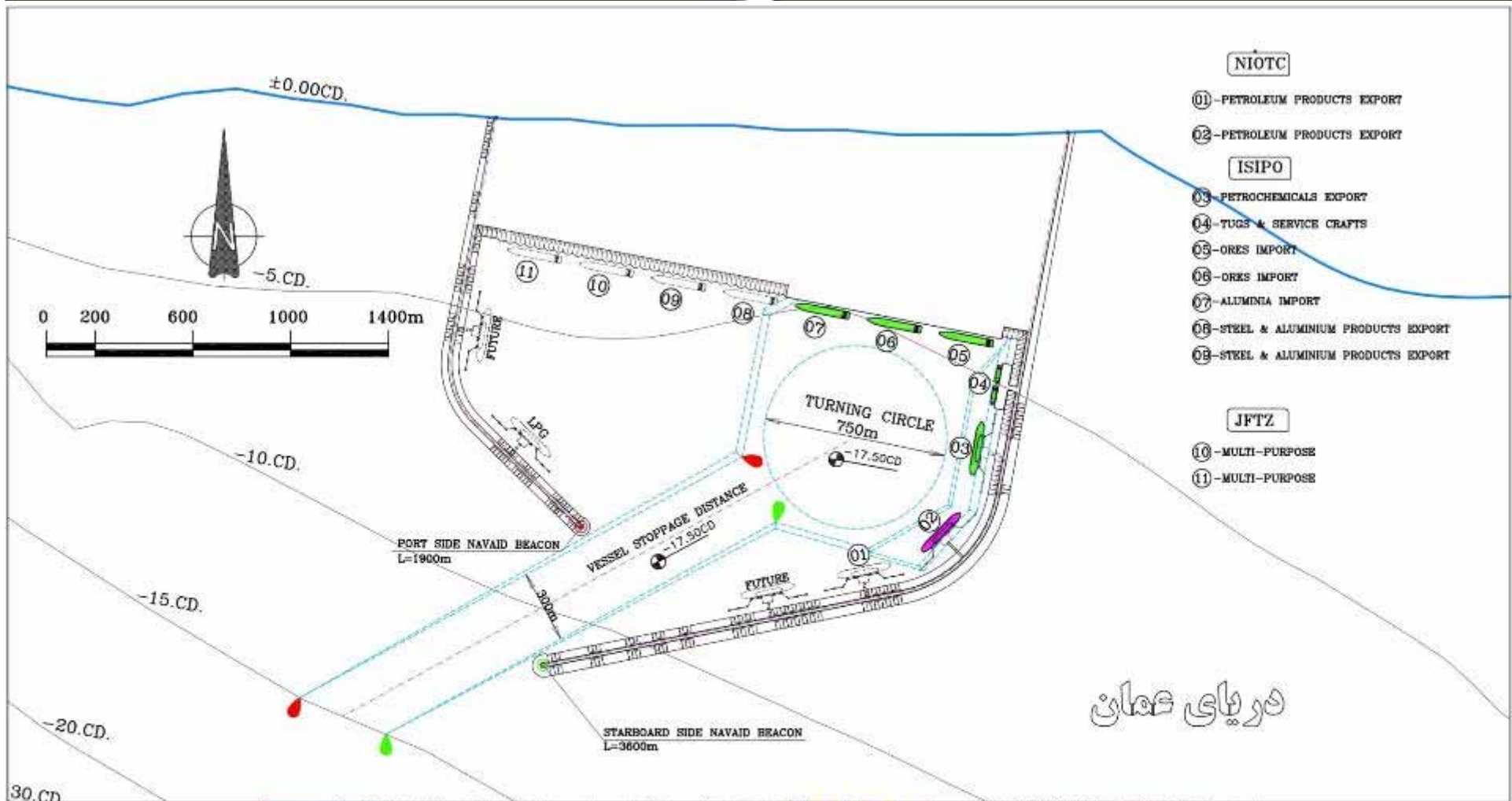


- راهنمای علائم
- آلمینیوم
 - فولاد
 - پتروشیمی
 - فروگرم
 - منیزیم
 - تیتانیوم
 - نیروگاه
 - صنایع پایین دستی
 - پوتیلیش
 - کریدور
 - خدمات
 - تیار و کارگاه
 - فضای سبز
 - بندر مادر
 - روستا
 - حریم 1500 متری روستا
 - حریم 2000 متری روستا



25°48'0"N

25°46'0"N



- NIOTC**
- 01- PETROLEUM PRODUCTS EXPORT
 - 02- PETROLEUM PRODUCTS EXPORT
- ISIPO**
- 03- PETROCHEMICALS EXPORT
 - 04- TUGS & SERVICE CRAFTS
 - 05- ORES IMPORT
 - 06- ORES IMPORT
 - 07- ALUMINIA IMPORT
 - 08- STEEL & ALUMINIUM PRODUCTS EXPORT
 - 09- STEEL & ALUMINIUM PRODUCTS EXPORT
- JFTZ**
- 10- MULTI-PURPOSE
 - 11- MULTI-PURPOSE

دریای عمان

موقعیت سایت پیشنهادی جدید
برای احداث بندر

ALTERNATIVE:(2)

مهندسان مشاور
SARAFAN
SARAFAN CONSULTANTS



وزارت صنعت، معادن و تجارت
Ministry of Industry, Mines and Trade

ISIPO
Iran Small Industries and
Industrial Parks Organization

از توجه شما سپاسگزاریم

Thanks for your attention

In case of queries please feel free to contact:

Babak.banijamali@daryabandar.com

+98 912 102 9884 (M)

+98 21 2250 6043 (O)

+98 21 2251 6063 (F)