

ENHANCING COMPETITIVENESS AND EXPLORING CURRENT OPPORTUNITIES IN THE IRANIAN ECONOMY

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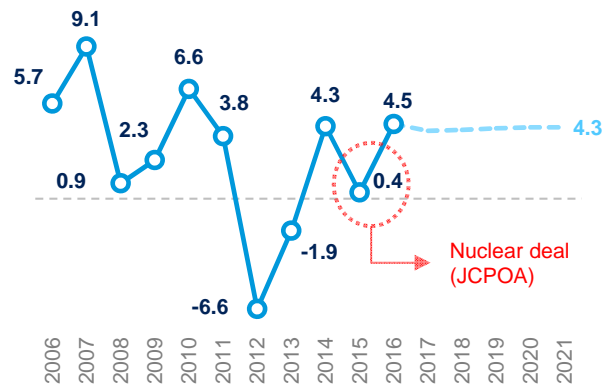
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IRAN MACRO-ECONOMIC DEVELOPMENTS

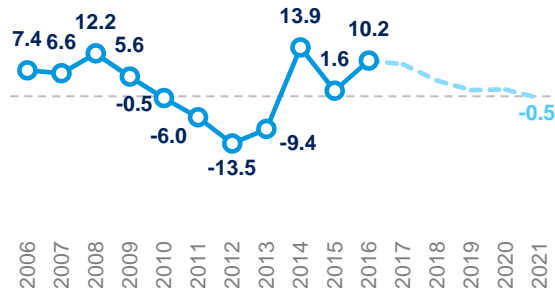
GDP GROWTH (in %)

- Short term boost related to sanctions
- Long term development to be supported by economic reforms

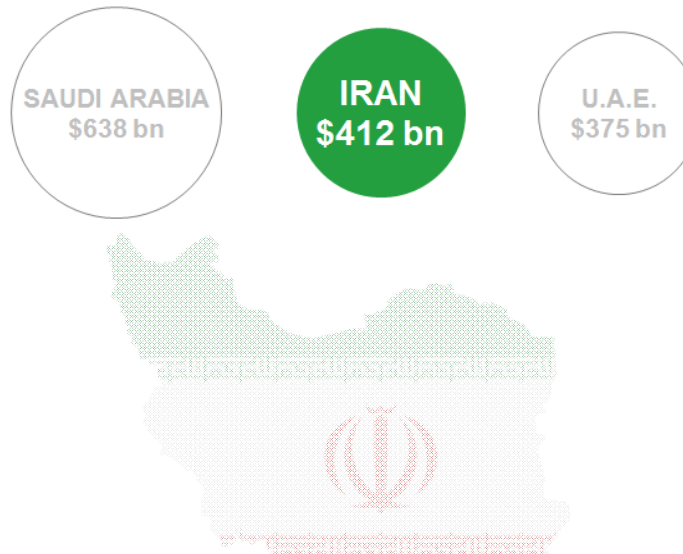


IMPORTS GROWTH (in %)

- Wheat and rice main import commodities
- Maturing market profile



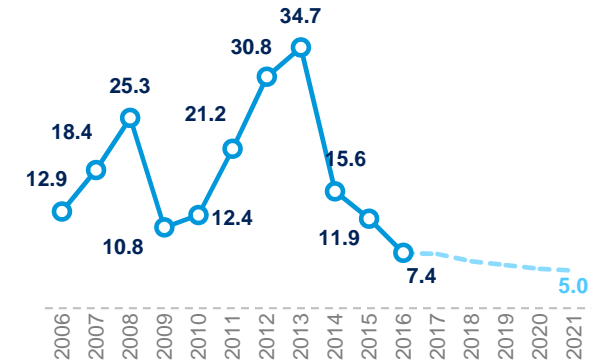
SECOND LARGEST ECONOMY IN THE MIDDLE EAST (2016F)



- 2nd largest economy in the Middle East
- Budget surplus expected in 2017
- Substantial Oil and Gas reserves expected to last over 100 years at current rate of production
- Large FX Reserves
- Very low external debt obligations
- Large domestic market

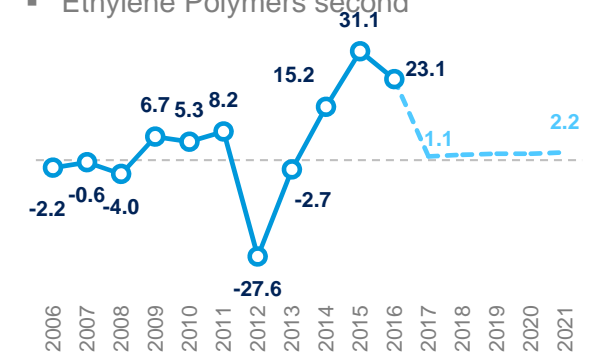
INFLATION GROWTH (in %)

- Inflation is coming down from historical high
- Moderate inflation forecasts

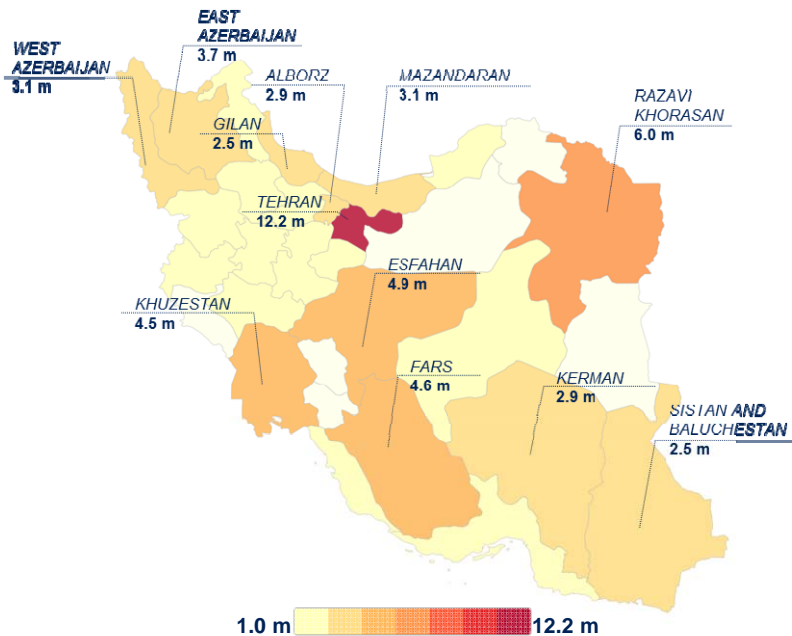


EXPORTS GROWTH (in %)

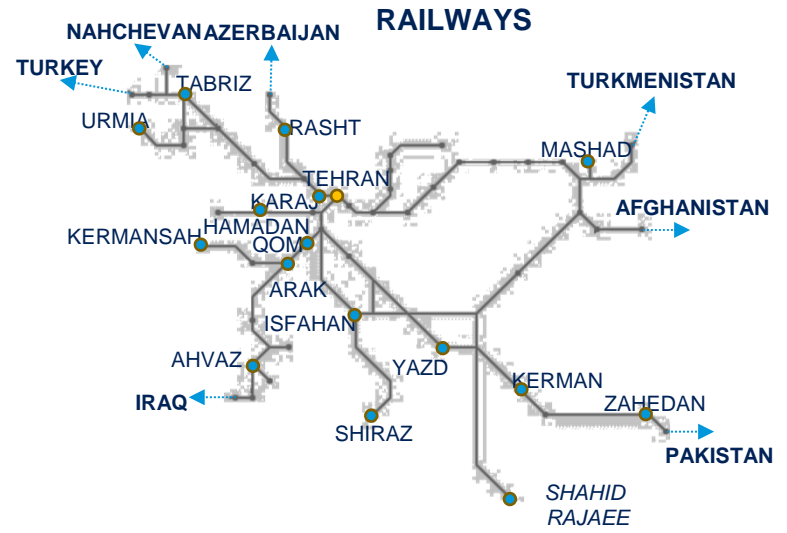
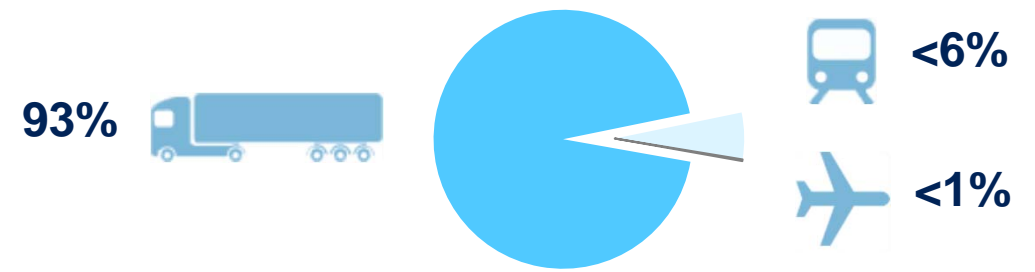
- Crude Petroleum main export commodity
- Ethylene Polymers second



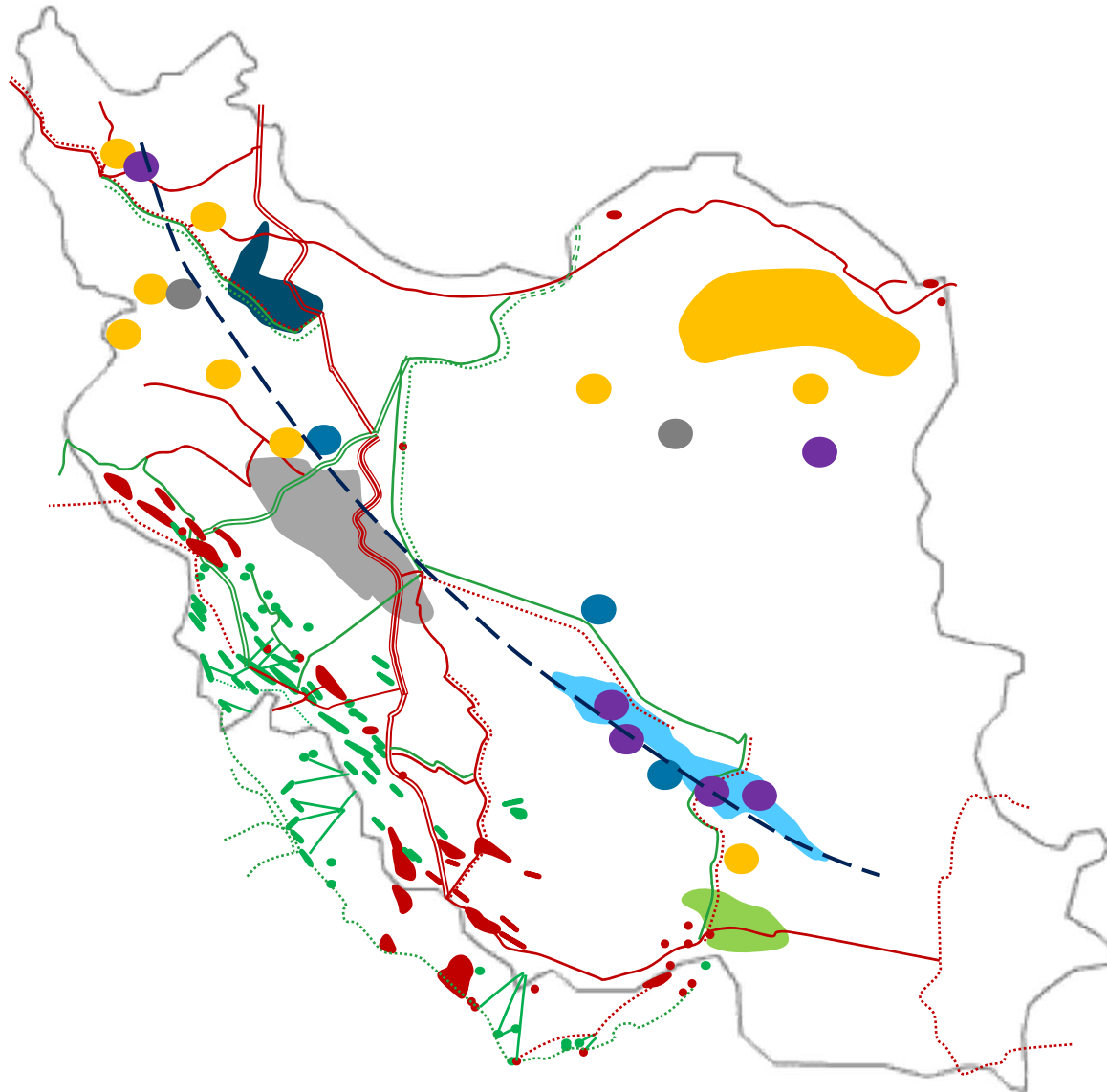
HINTERLAND ACTIVITIES



FREIGHT TRANSPORTATION BY MODE (2014)



NATURAL RESOURCES



NATURAL GAS

- Fields
- Pipelines
- Planned pipelines

OIL

- Fields
- Pipelines
- Planned pipelines

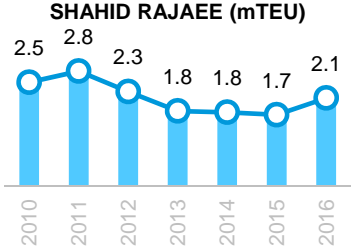
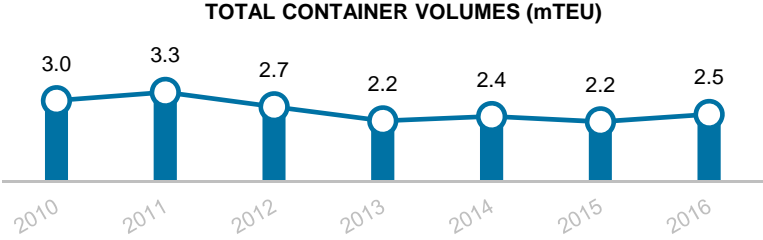
ECONOMIC GEOLOGY OF IRAN

- Cu Line
- Au Deposit/Prospect
- Fe Deposit/Prospect
- Cu Deposit/Prospect
- Zn, Pb Deposit/Prospect
- Kerman Cu Belt
- Malayer-Isfahan Pb, Zn Belt
- Esfandagher – Faryab Cr Belt
- Takran and Kavir-Sabzevar Cu
- Tarom – Hashtjin Cu, Pb, Zn, Fe

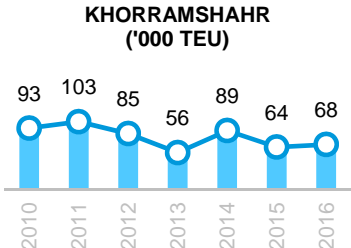
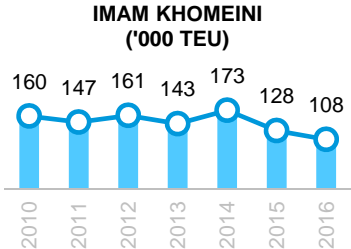
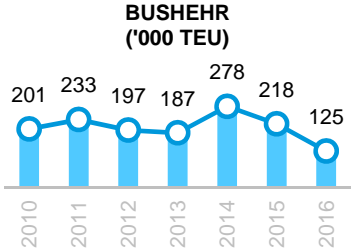
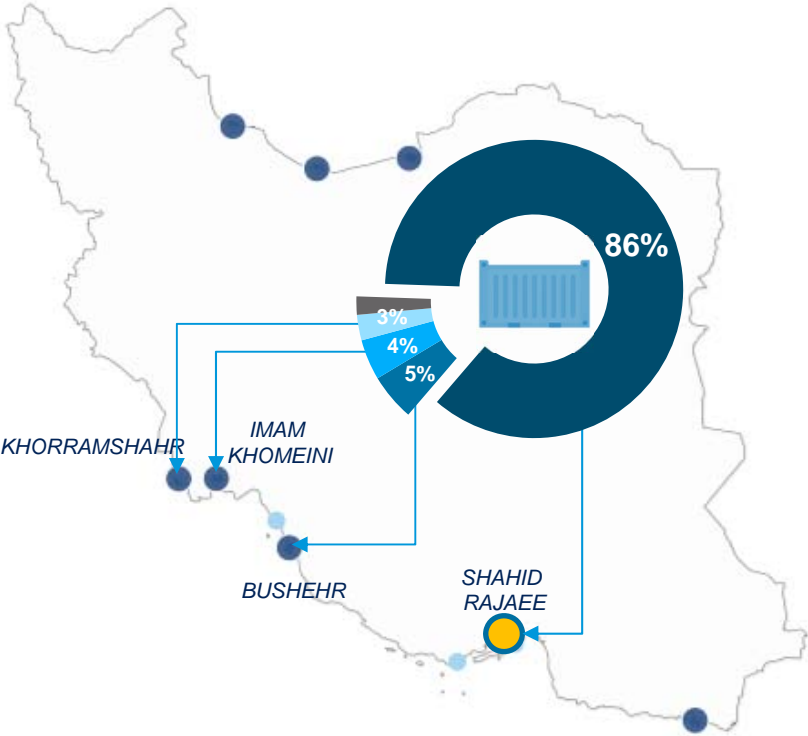
CARGO FLOWS: CONTAINERS

Key Developments

- Shahid Rajaei (formerly Bandar Abbas) main gateway
- Pre-sanction volumes 30% higher
- Strategic Location for transit
- Maersk, MSC, CMA-CGM, UASC, HMM, Messina, PIL, Wan Hai and Evergreen are all back in Iran
- Increase in ship sizes observed
- 10,000 TEU ships expected to become regulars



SHARES – CONTAINER HANDLING (2016)

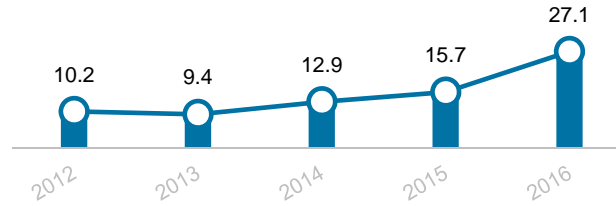


OIL (IMPORT AND EXPORT)

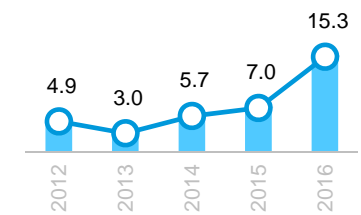
Key Developments

- Production back at pre sanction levels
- Calls for \$100 billion foreign investment
- Total and Shell signed non binding agreements to develop oil and gas fields.
- PARS Offshore Supply base development

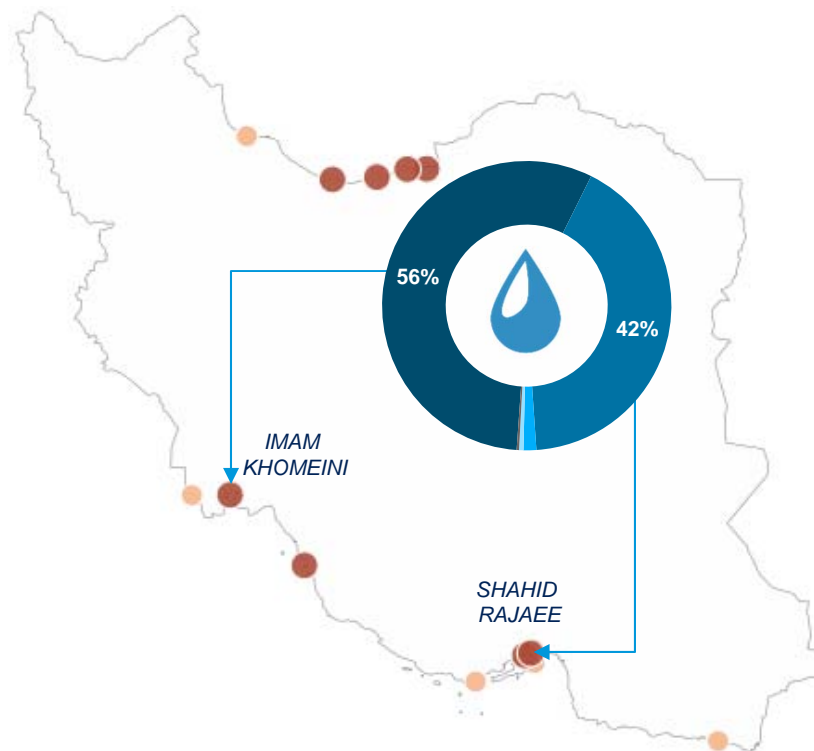
TOTAL OIL I/E VOLUMES (mTON)



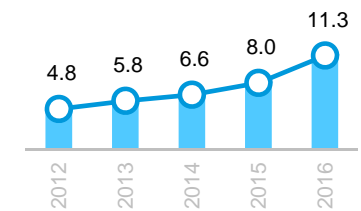
IMAM KHOMEINI (mTON)



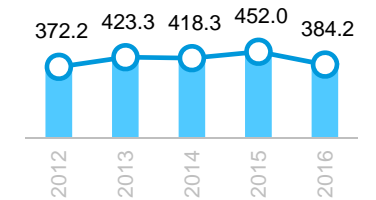
SHARES – OIL COMMODITIES (I+E 2016)



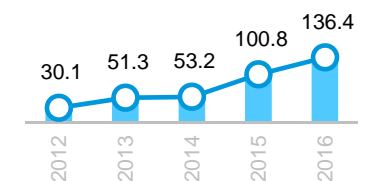
SHAHID RAJAEI (mTON)



BUSHEHR ('000 TON)



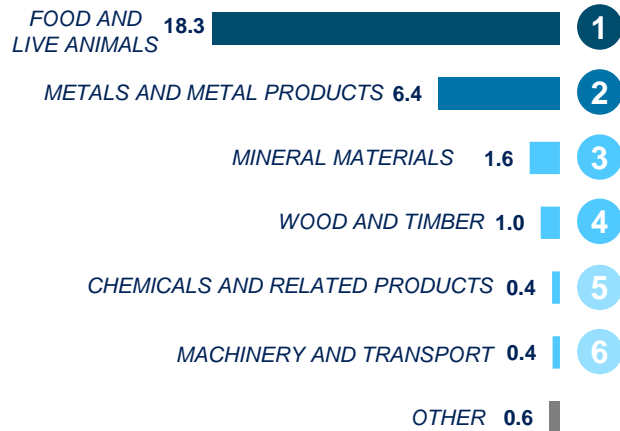
SHAHID BAHONAR ('000 TON)



IMPORT AND EXPORT OF NON-CONTAINER CARGOS (excl. oil)

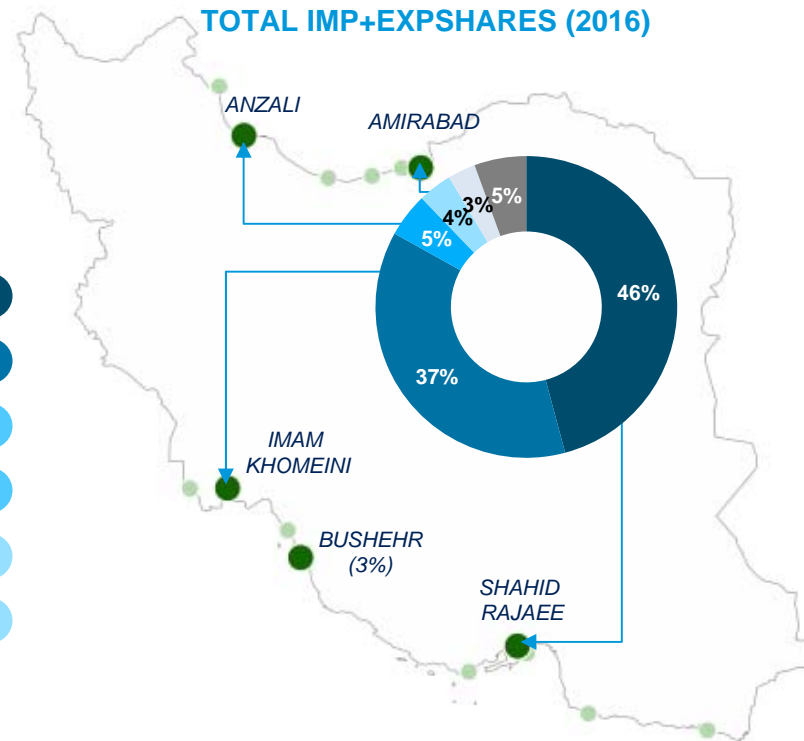
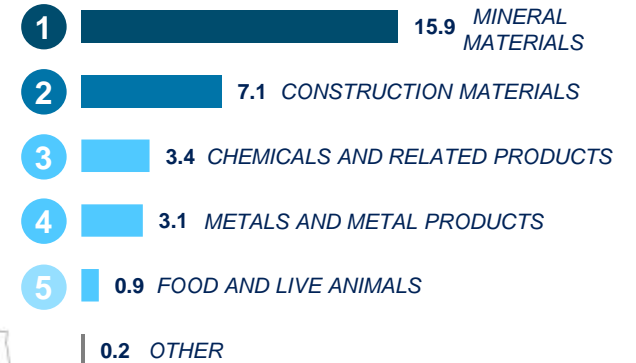
IMPORT

MAJOR CARGOES (mTON, 2015)

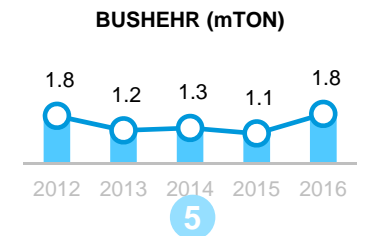
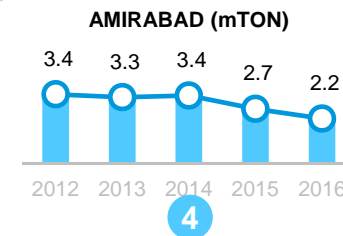
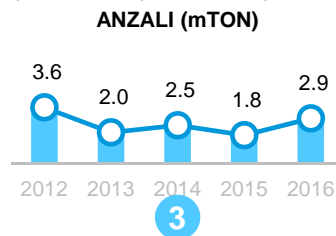
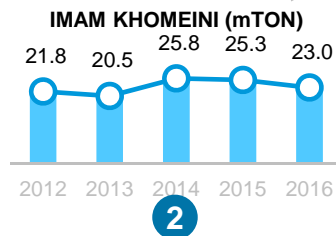
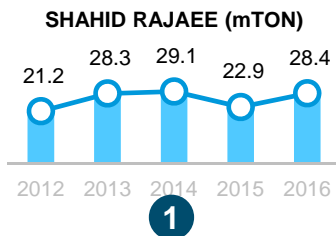
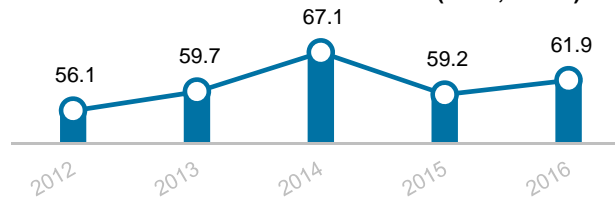


EXPORT

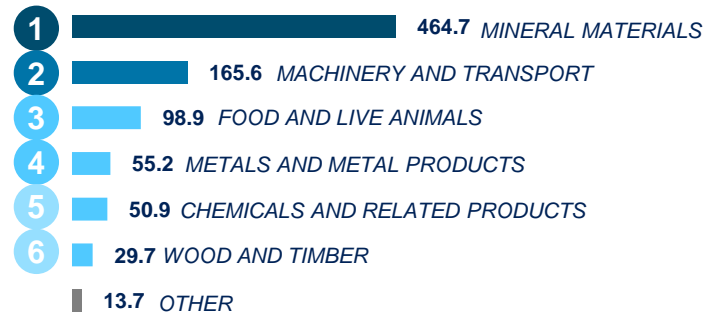
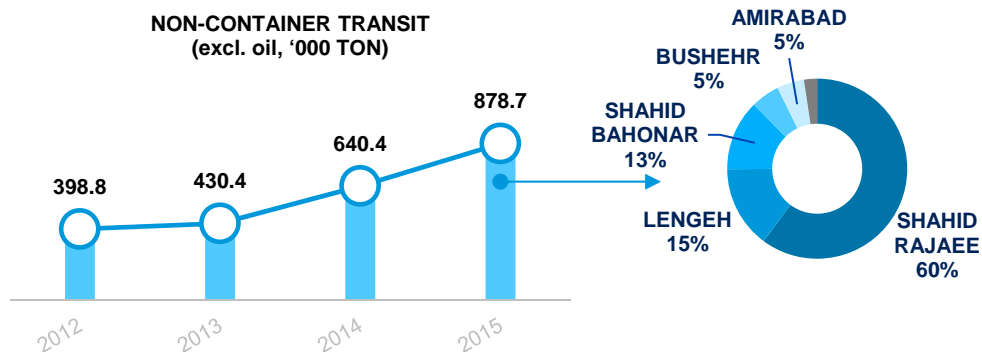
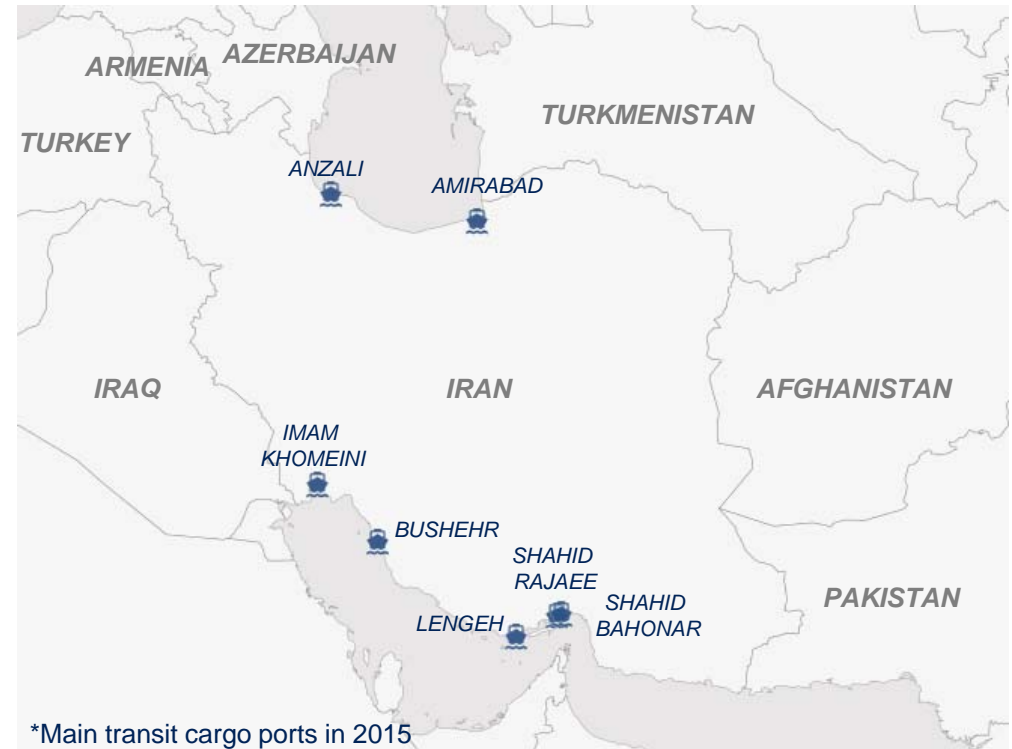
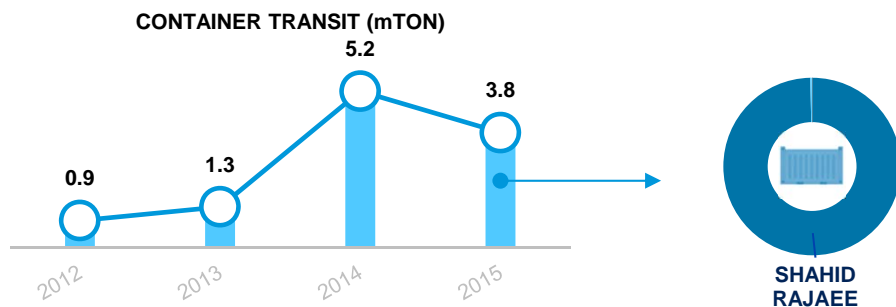
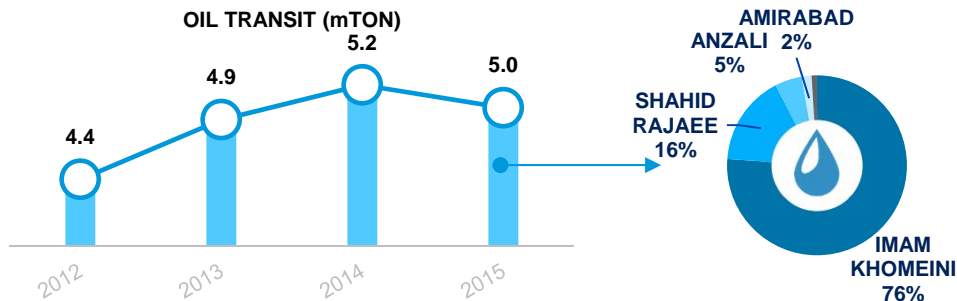
MAJOR EXPORT CARGOES (mTON, 2015)



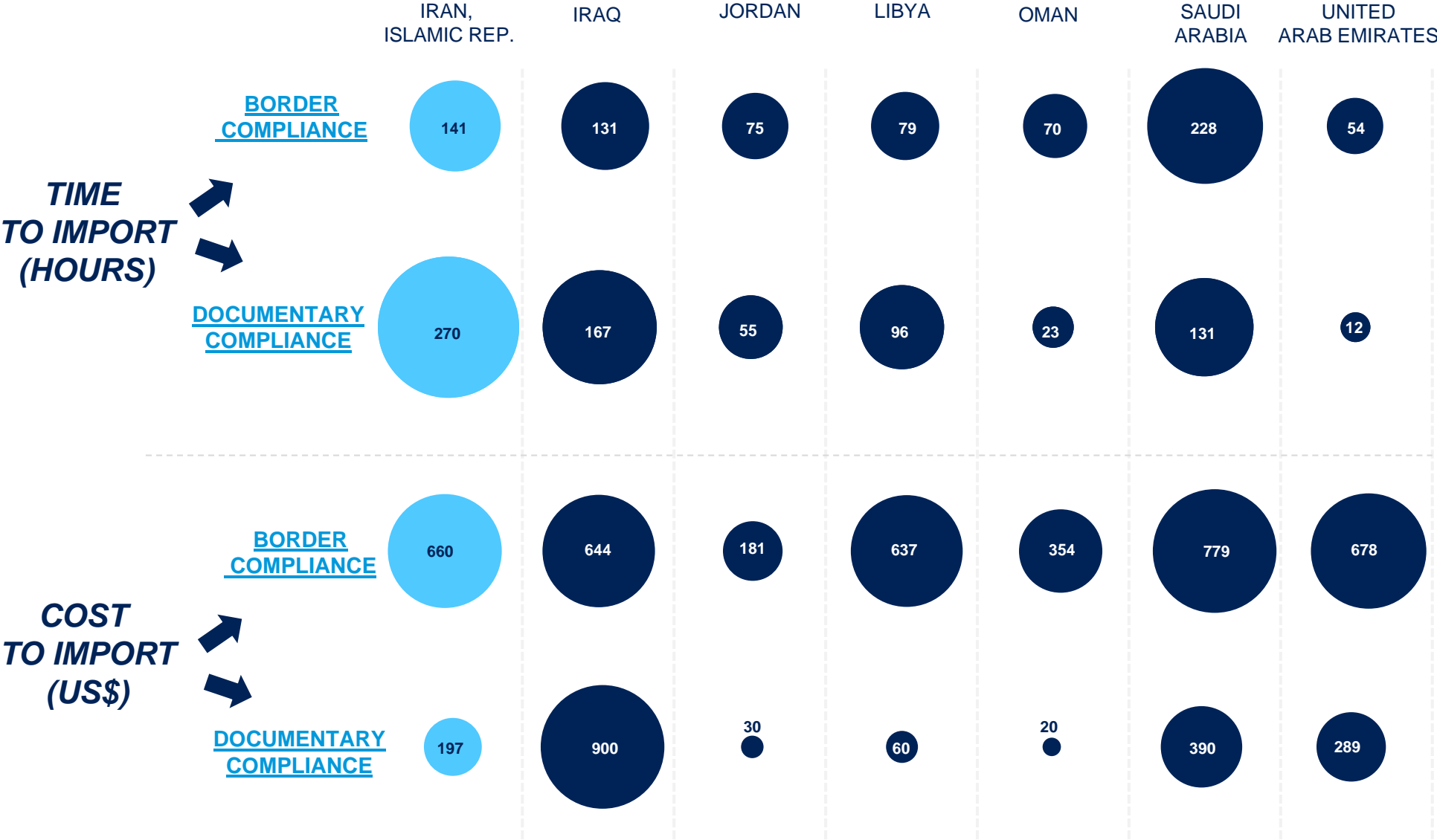
TOTAL NON-CONTAINER VOLUMES (ex.oil, mTON)



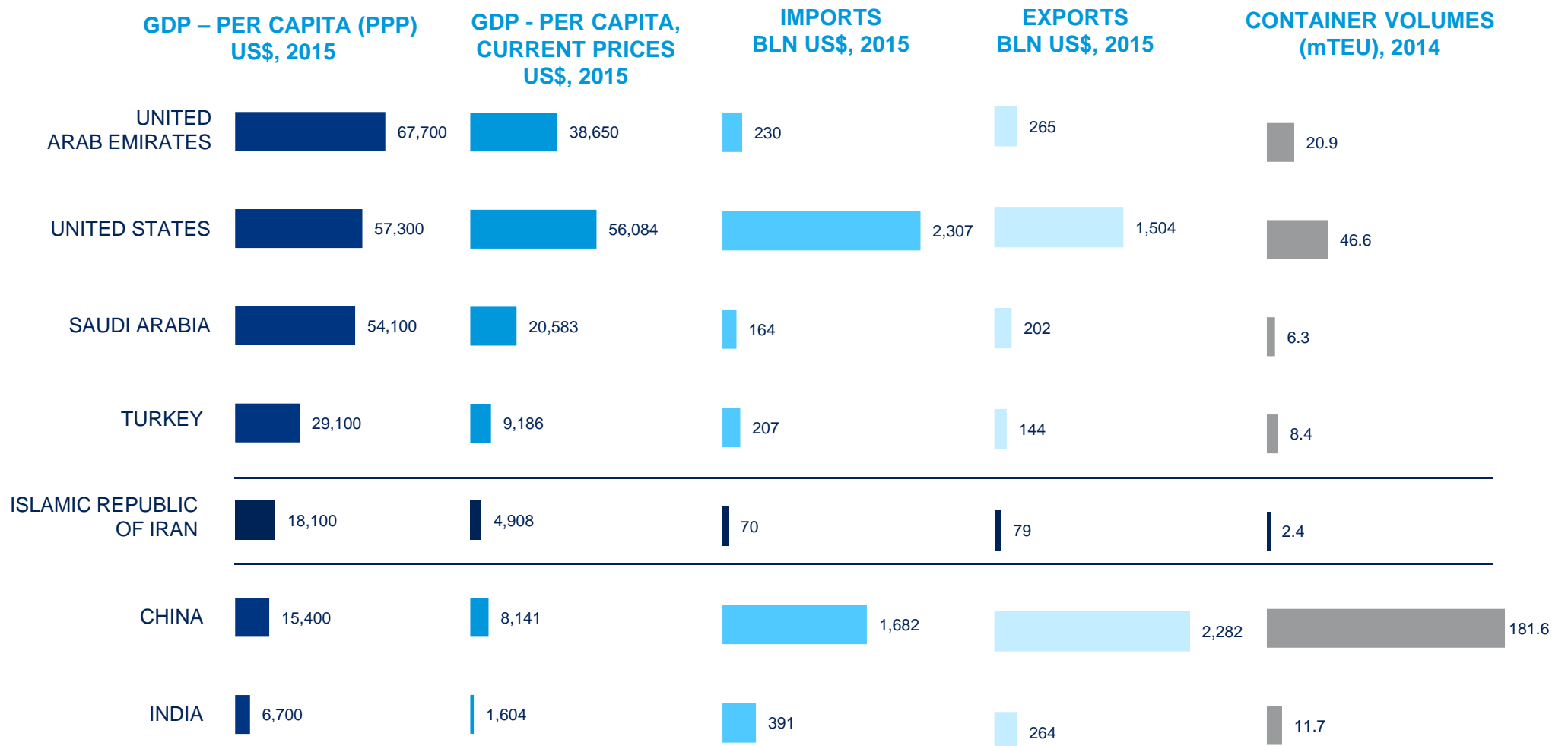
TRANSIT CARGO OVERVIEW












CUSTOMS AND BORDER CONTROL



ECONOMIC PERFORMANCE PARAMETERS



INVESTMENT RISKS AND GRADING

Risk	Scaling	Trend	Outlook
General Risk			
Expropriation Risk			
Exchange Transfer and Trade Sanctions Risk			
Sovereign Default risk			

Extremely Low Risk  Extremely High Risk

PORT AND SHIPPING OPPORTUNITIES

- Oil and Gas Developments:
 - Storage Capacity
 - Refining Capacity
 - Pars Offshore Supply Base
 - Outside technology needed for oil and gas production
- Transit Cargo
 - Chahabar Port for Access to Afghanistan
 - Rail road
 - Increase efficiency for border movements and ease of access
- Increase Foreign Direct Investment
 - Privatisations, Concessions and PPP
- Automotive
 - Sector well positioned for growth
 - Increased Ro-ro cargo
- Container and Bulk Cargo
 - Ready for growth

THANK YOU!

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37,000 experts

500 offices

40 countries

5 continents

