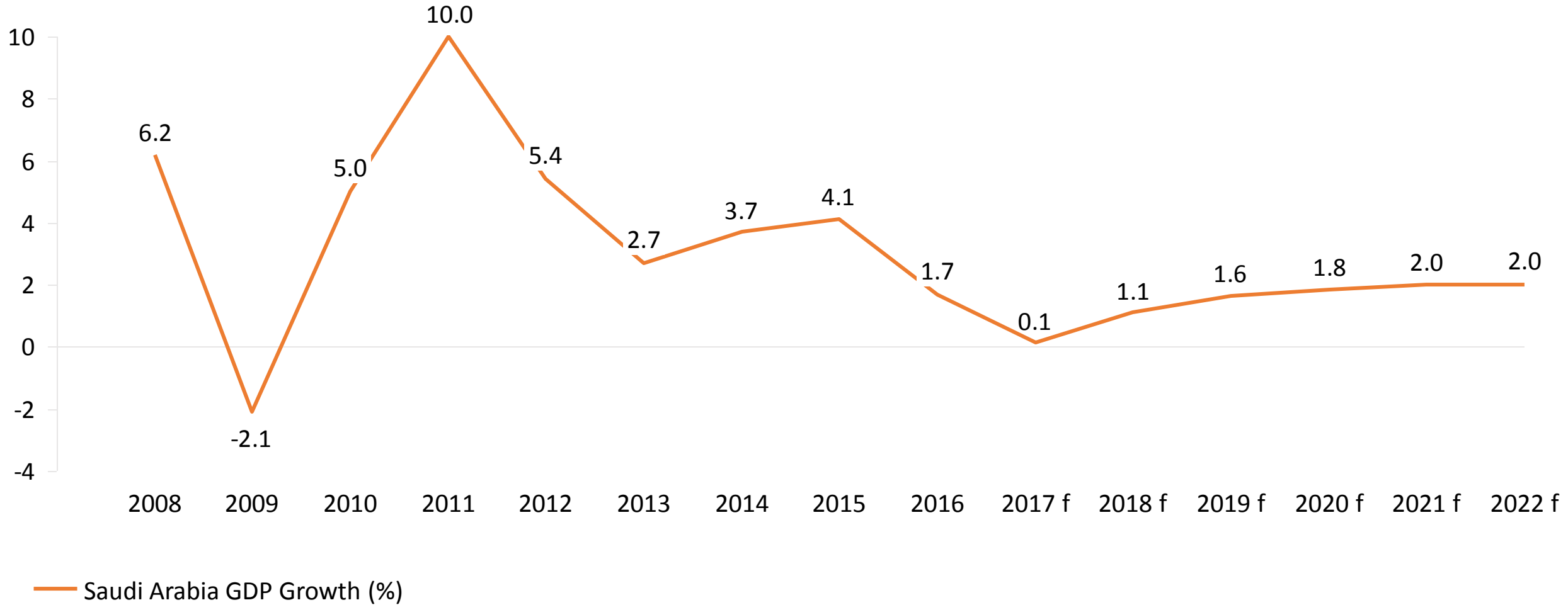


Gulf Stevedoring Contracting Co.

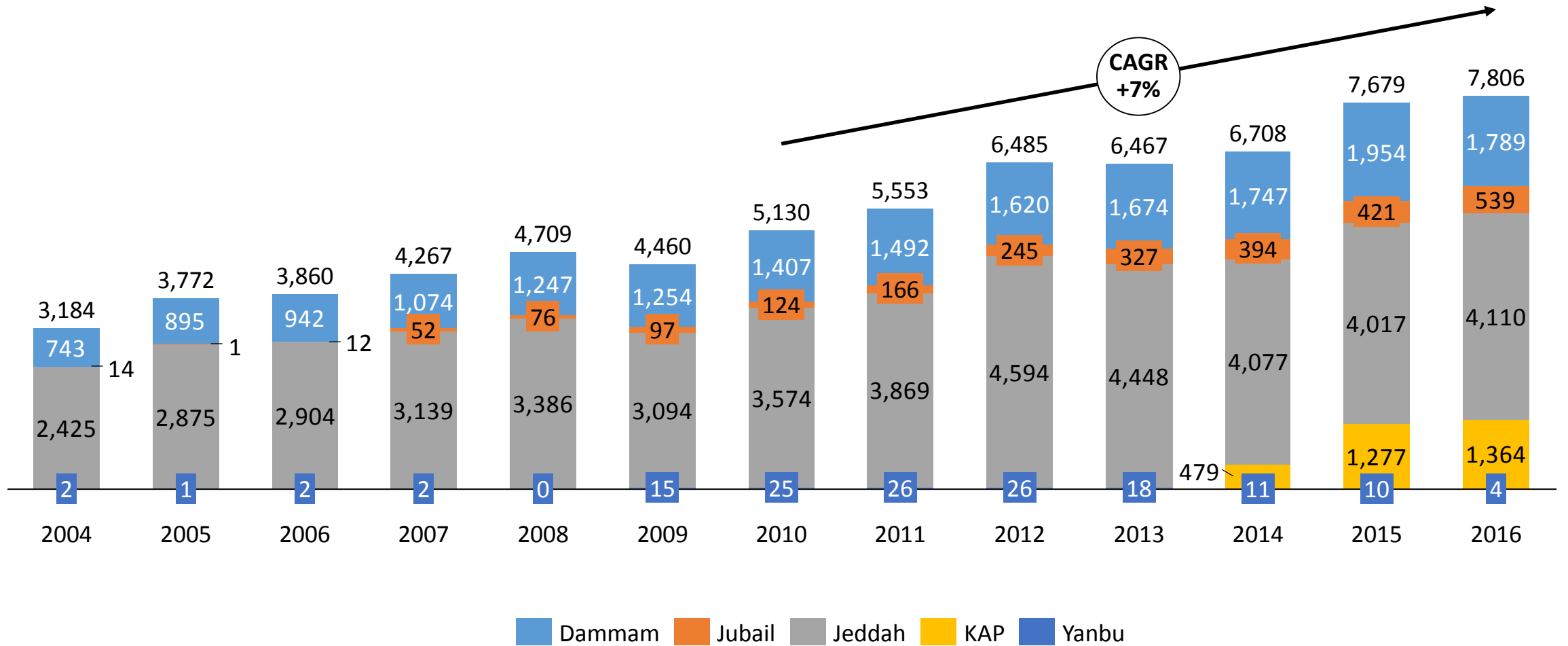
Opportunities at Jubail



Saudi Arabia is the central player in the Middle East – economically, politically and geographically

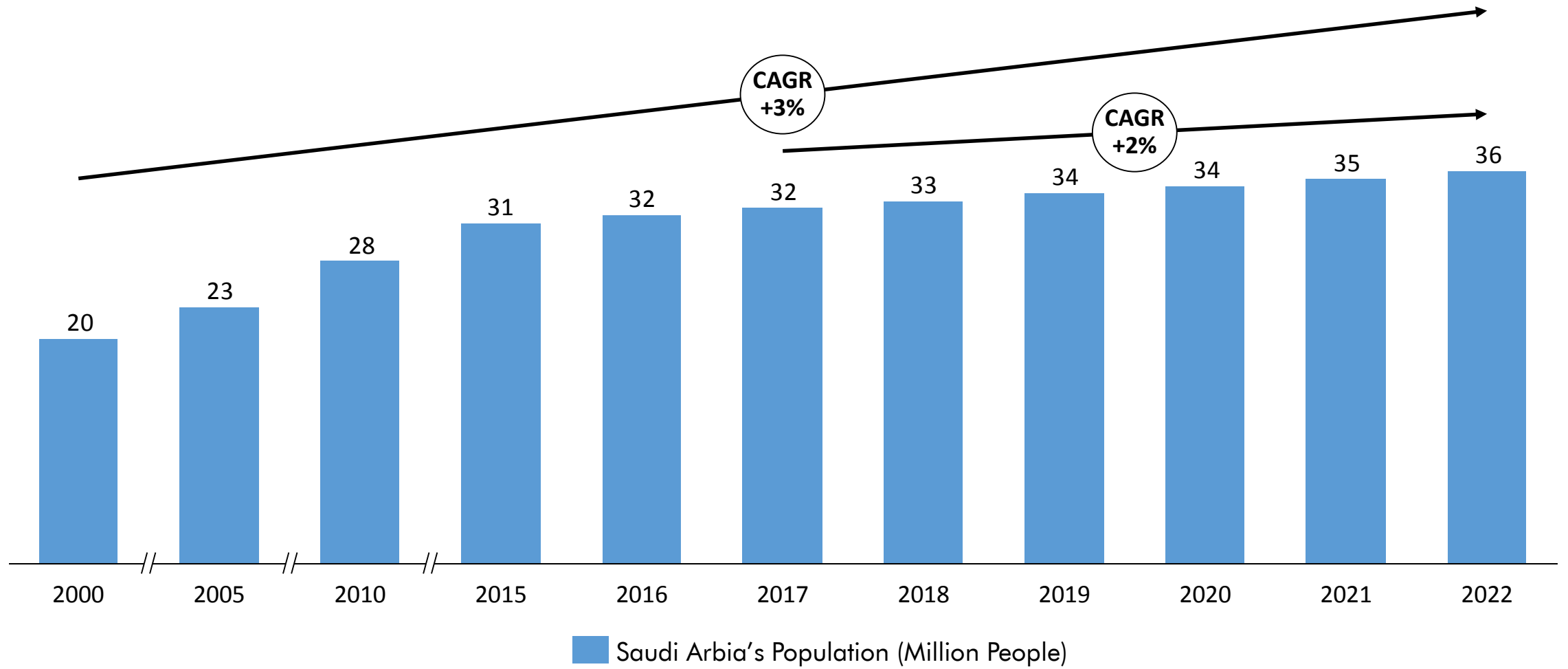


It is also the biggest local market in the Middle East at 7.8 M TEUs (2016 estimates)



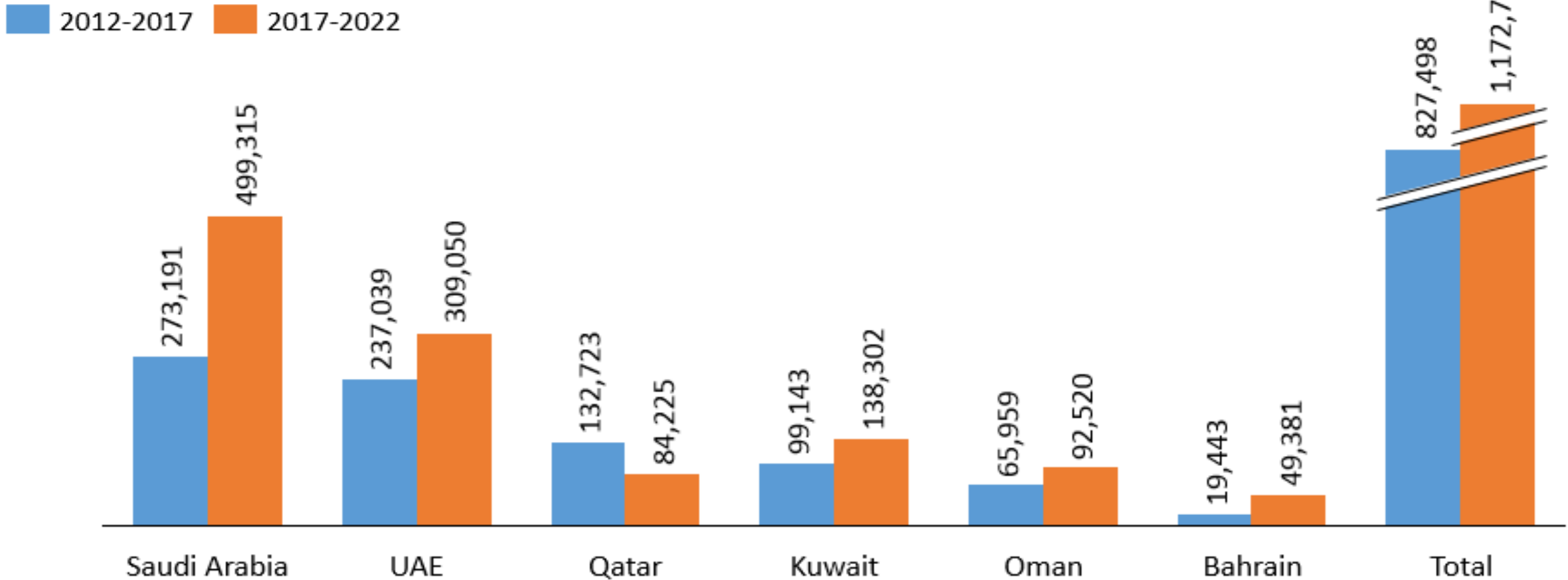
Source: Saudi Port Authority, Press releases from port operators

With high population growth and a favourable mix of youth and experience



Resulting into a world of opportunities...

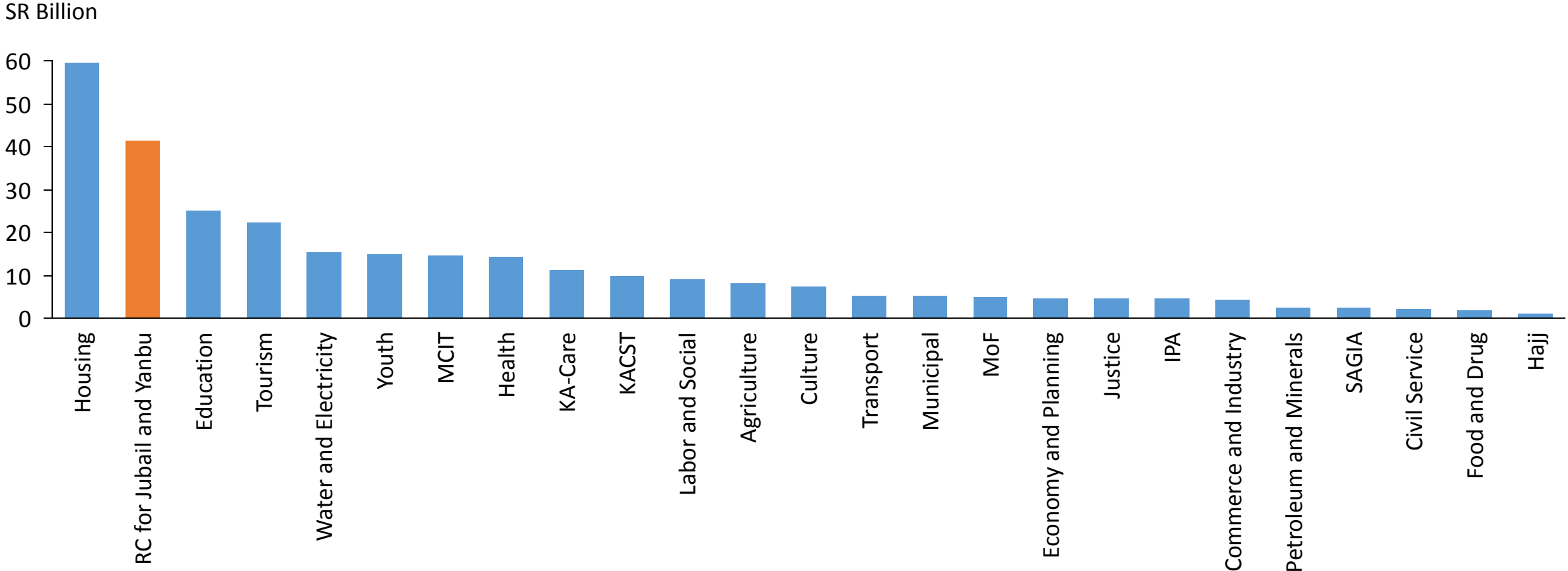
Comparison of contract awards 2012 – 17 vs. project pipeline 2017 – 22 (USD Million)



The Government is providing stimulus to grow under NTP 2030



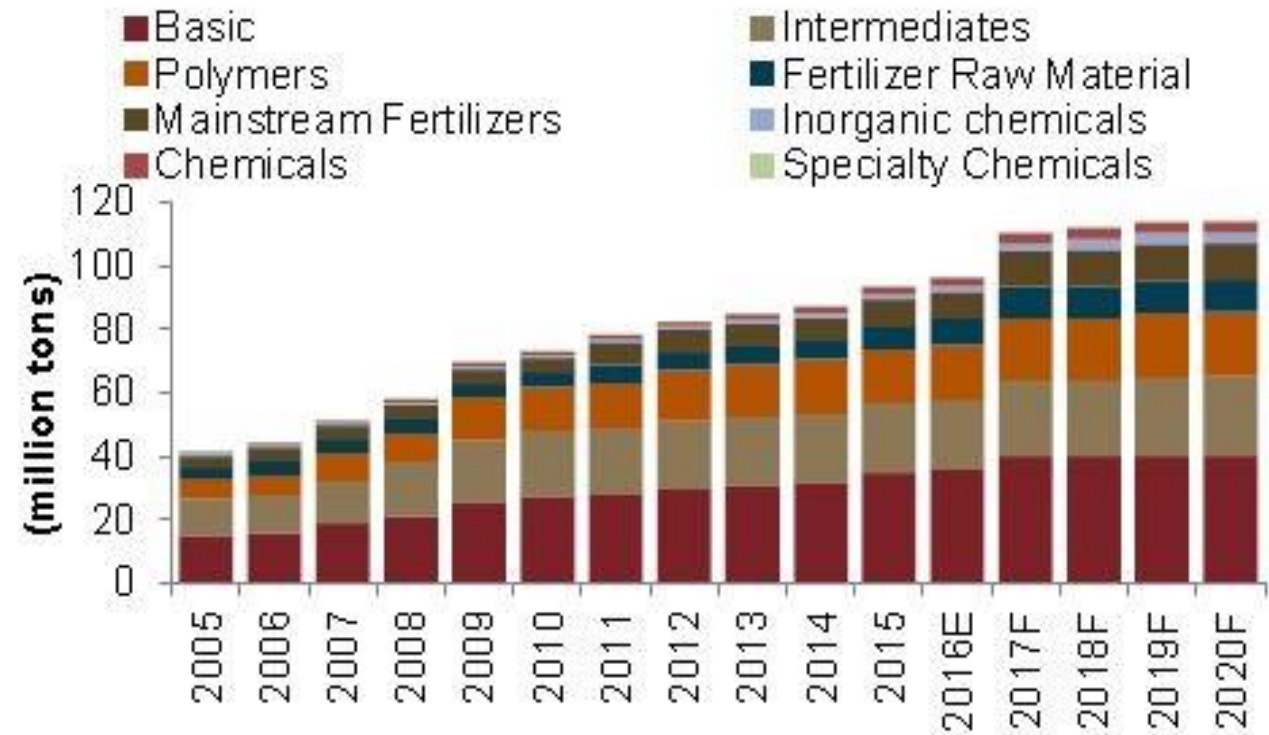
Royal Commission for Jubail and Yanbu (RCJY) is allocated second largest amount of funds under the NTP



Source: The National Transformation Program

- The prominent role of petrochemicals identified by Vision 2030 as one of the sectors to lead the push away from fossil fuel reliance.
- Petrochem sector expected to grow to 100 M MTs within four years - 85% of these are expected to be exports.

Saudi petrochemical capacity (2005-2020F)

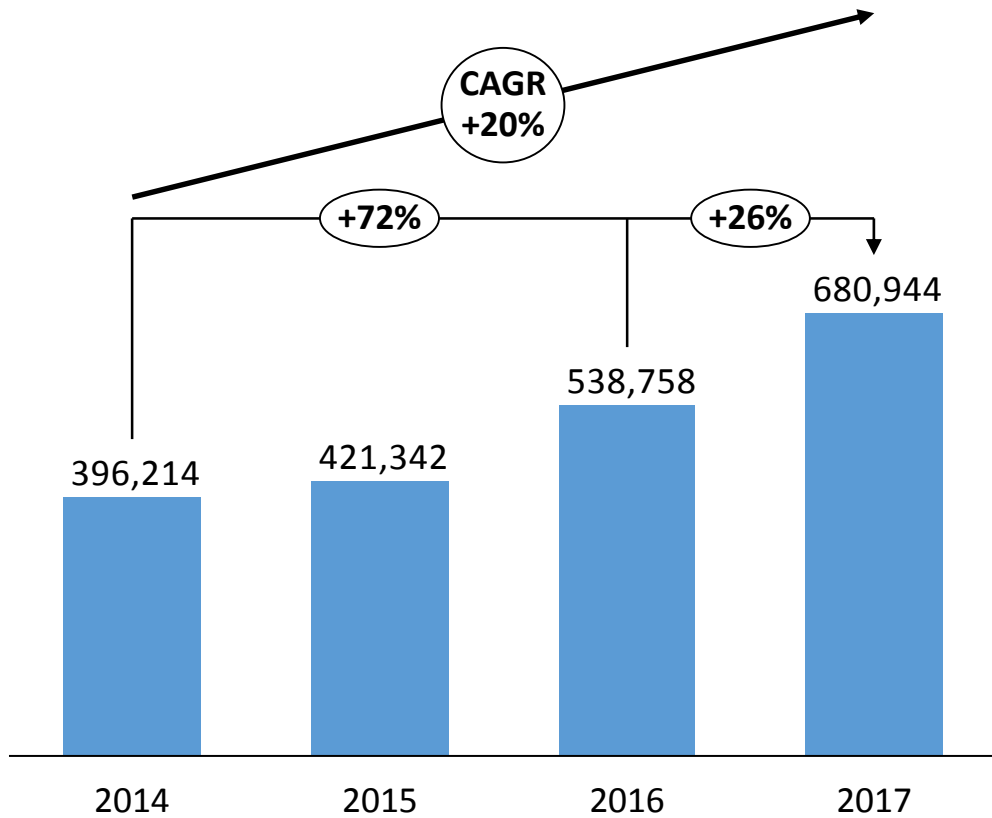


Other opportunities...

- The Government is investing in tourism, telecommunications, natural gas exploitation and power generation sectors to diversify economy – Opportunity!
- Positive project activity - currently \$1.2 trillion-worth of projects either planned or under way in Saudi Arabia – Opportunity!
- These projects, coupled with a young dynamic population means an expected rise in imports – Opportunity!
- The Government's policy on water conservation is expected to lead to increase of imported agricultural products especially for the Dairy Industry (up to 1.2m MT of hay by 2018) – Opportunity!



Which has led to extraordinary growth at Jubail port



Jubail Container Throughput (TEUs)

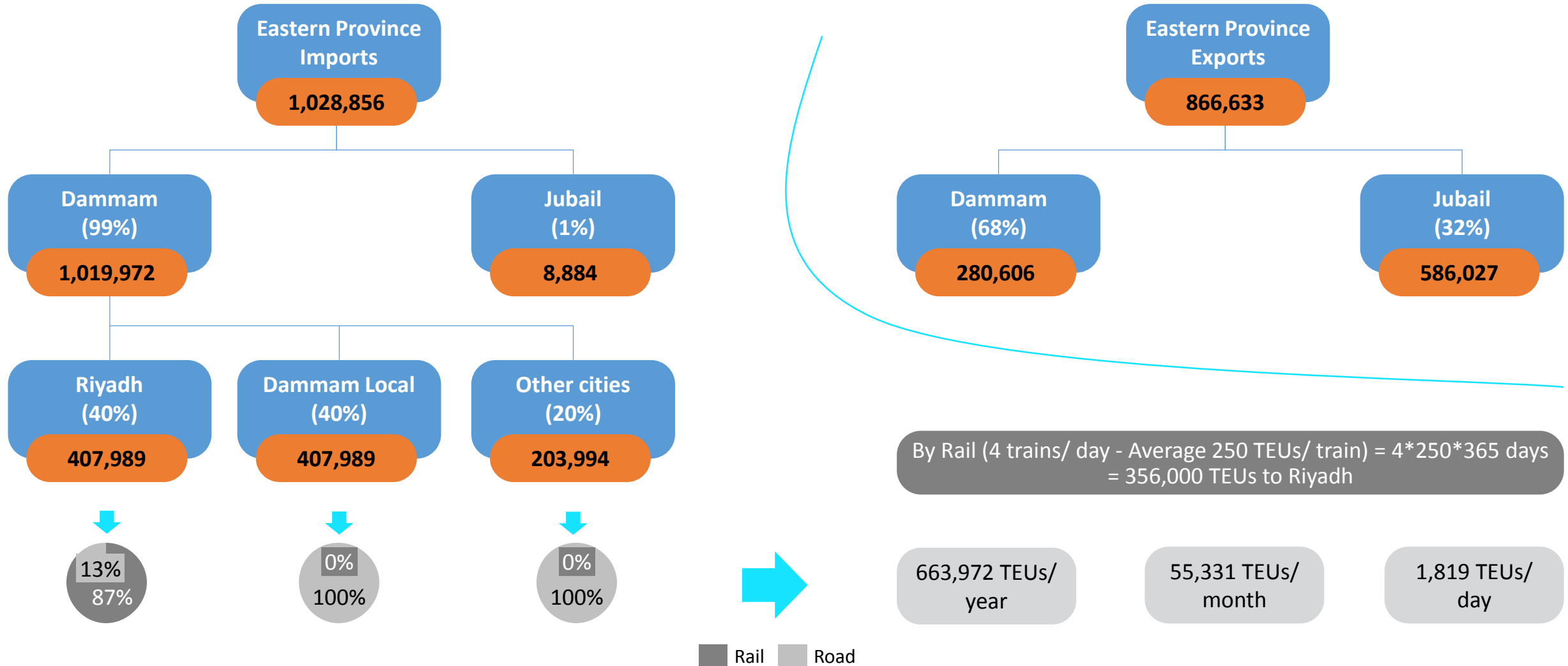
Full Exports growth at Jubail 2016/ 2017

27%

Full Imports growth at Jubail 2016/ 2017

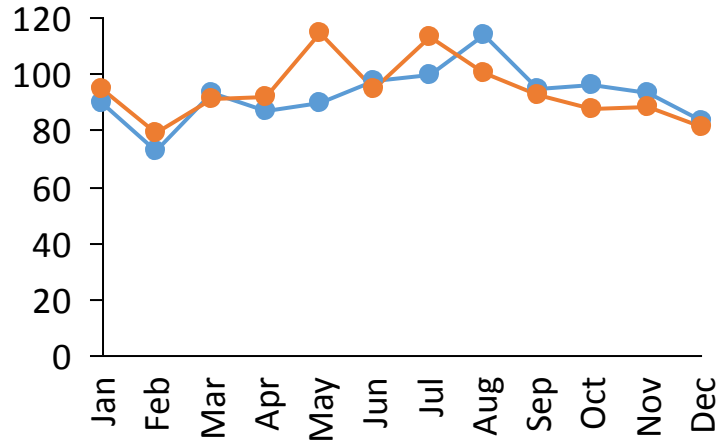
72%

A more granular look tells that the rail has definitely impacted the traffic flow in the Eastern Province, but road transport is still a major player

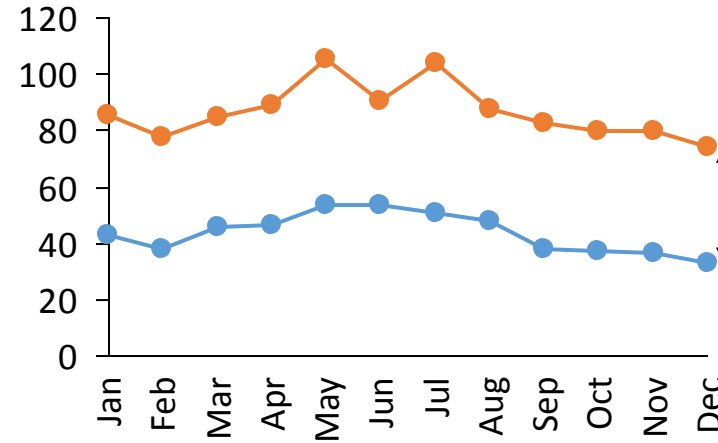


However, to realize these opportunities and play our role to make NTP a success, we need to eliminate any inefficiencies in the processes that we have followed for a number of years

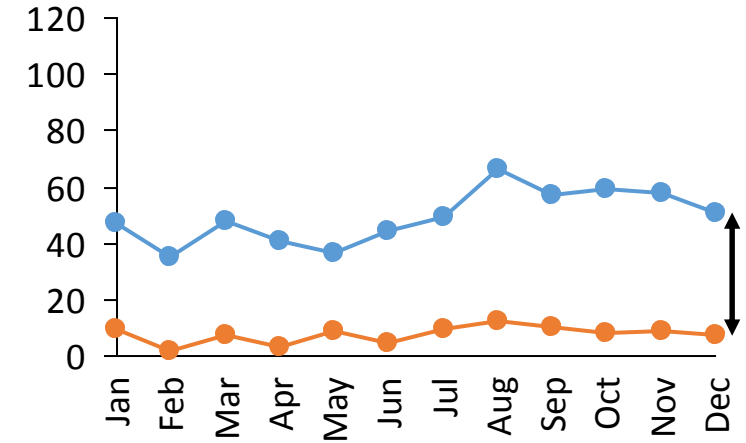
Eastern Province



Dammam



Jubail



2017 Imports: ~1,126

1.02



2017 Exports: ~1,108

2017 Imports: ~1,038

2.00



2017 Exports: ~520

2017 Imports: ~88

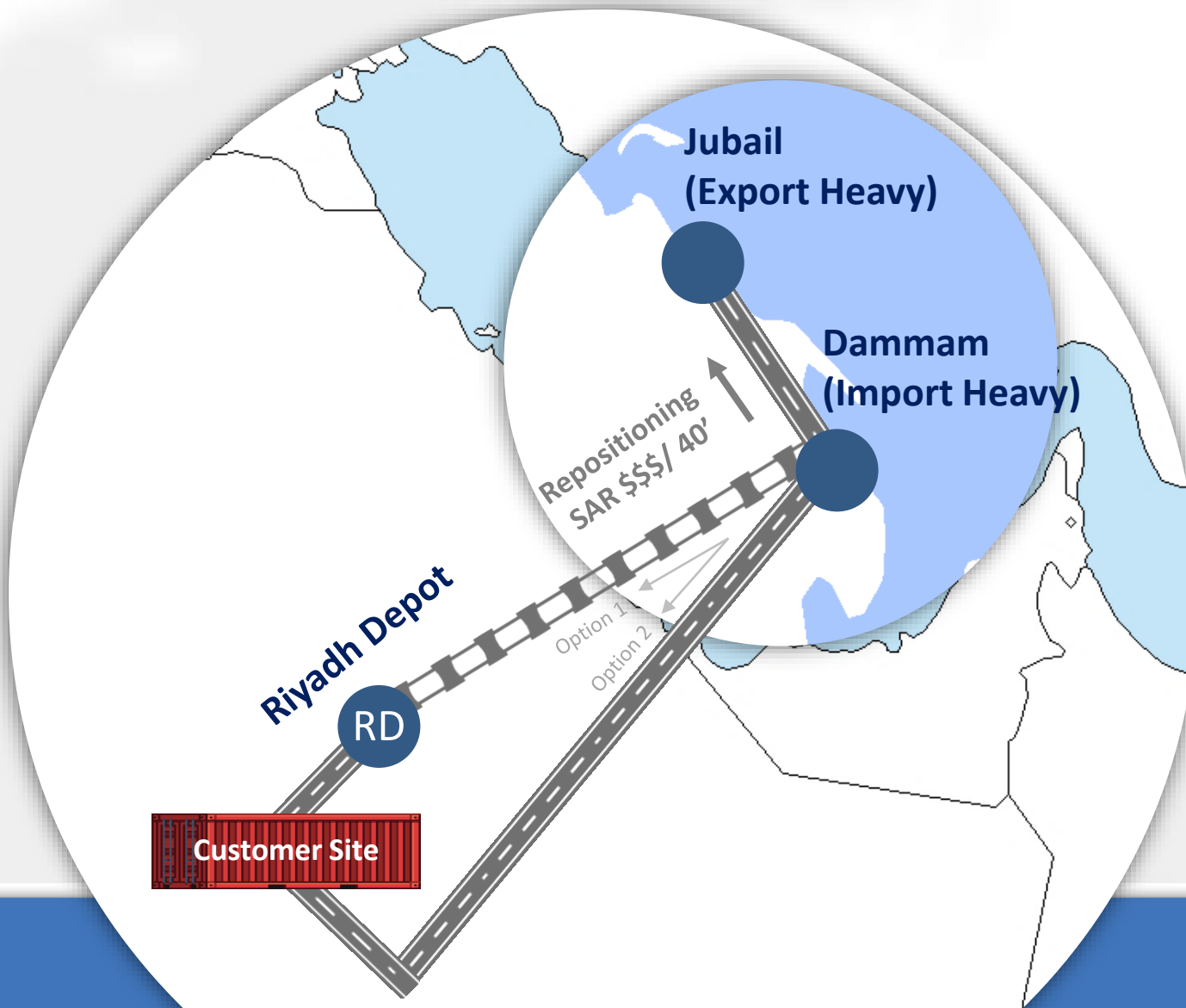
0.15



2017 Exports: ~588

● Export ('000 TEUs) ● Import ('000 TEUs) Import/ Export Ratio

Today, Dammam is an import centric and Jubail is an export centric port. This results in heavy empty container repositioning creating inefficiencies in supply chain as well as increase in cost



Jubail port's capabilities have grown multifold in the last few years



Weekly Services

8

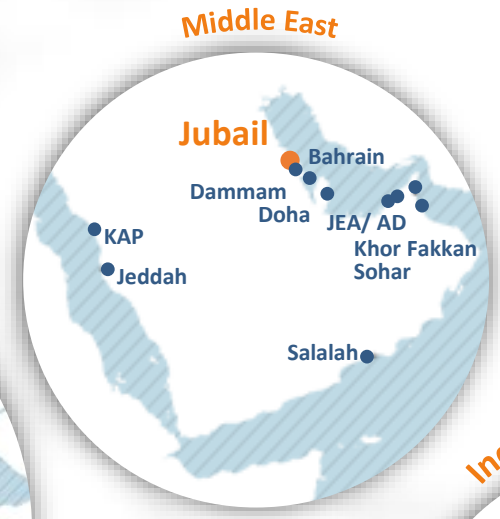
Vessels Per week

39

Direct Port Calls

40

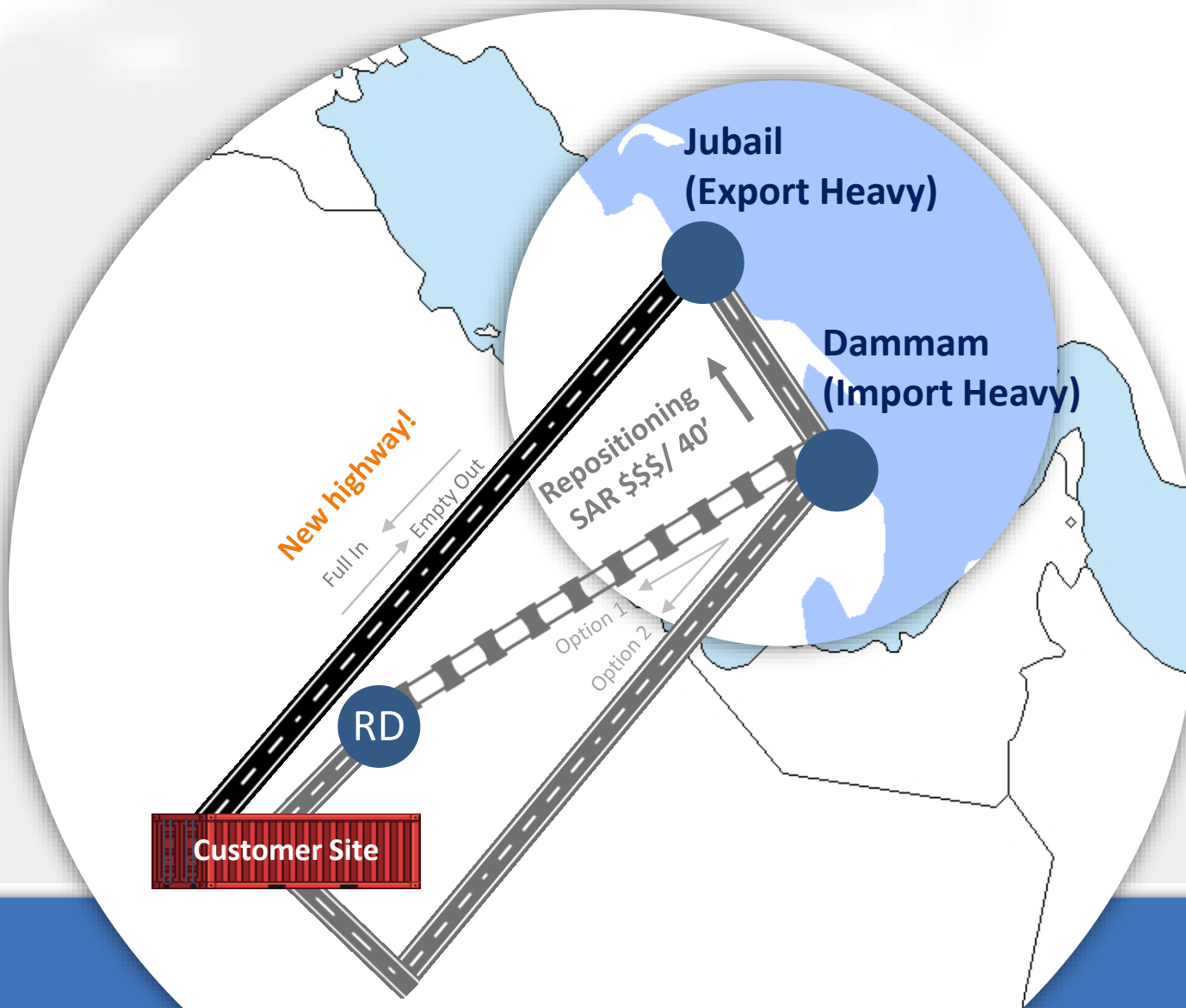
Jubail port is now connected on direct weekly services to the global markets



With all major shipping lines calling the port directly

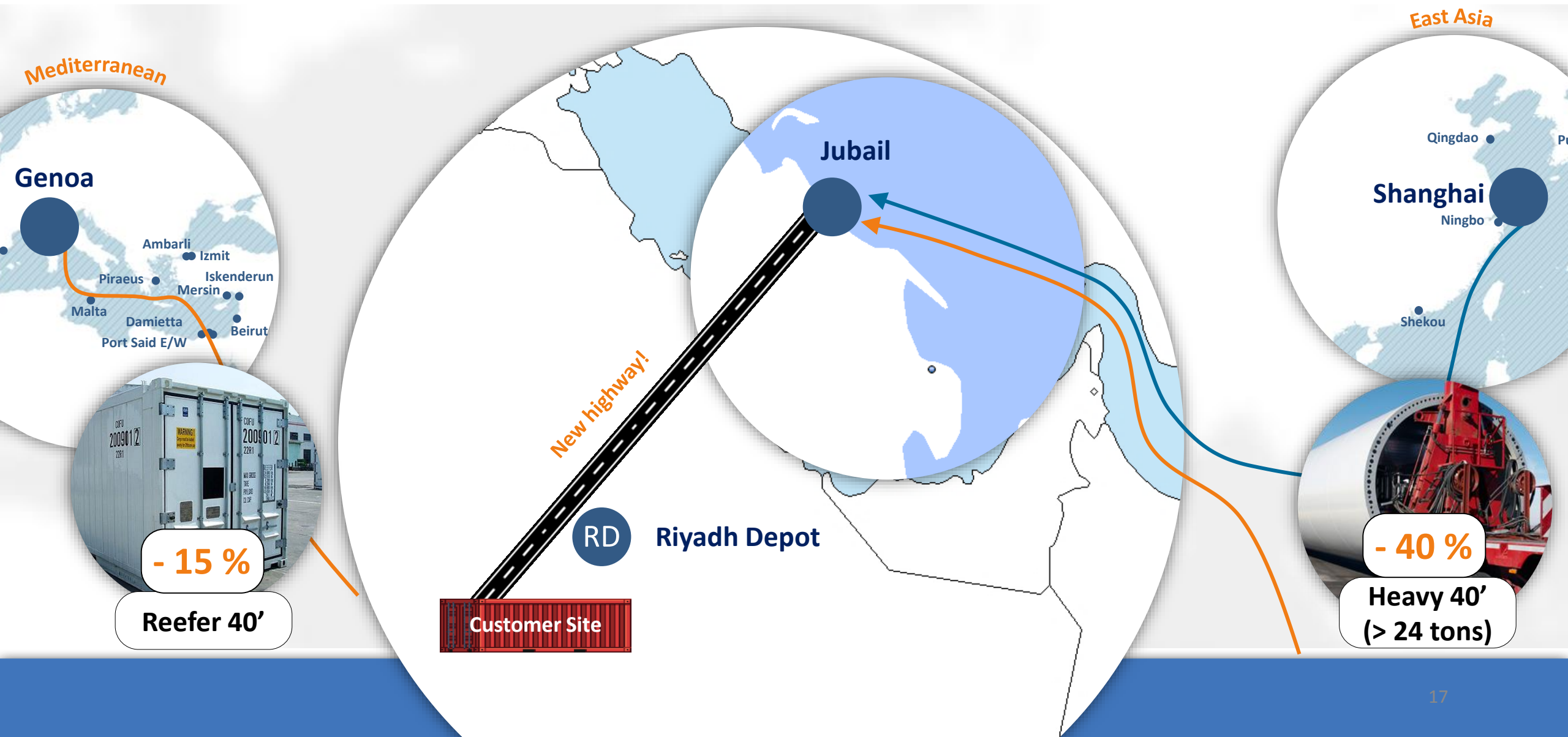


Import volume growth (albeit at a lower base) at Jubail is the result of change in perception and willingness of our customers to adopt an alternative route for their import requirements thereby driving inefficiencies out...



-  Existing Route
-  Proposed Route
-  Riyadh Depot

...as well as reducing the cost of transport – Sample cost savings of shipments from two of our major import customers who adopted the new route



The proposed shipping route (Jubail – Riyadh) is a win – win solution for all



Consignees

- Major savings, up to 44% in transportation cost over rail transport;
- Faster clearance;
- Delivery to site;
- No congestion at terminal;
- No road blocks;
- Direct road links to Riyadh;
- Tailored case by case solutions!



Shipping Lines

- Productivity at +40 moves an hour;
- Empties made available in Jubail – savings of repositioning cost;
- Elimination of positioning move i.e. DAMMAM-JUBAIL move;
- Faster Turnaround of Equipment, considering that traffic bans will be avoided.

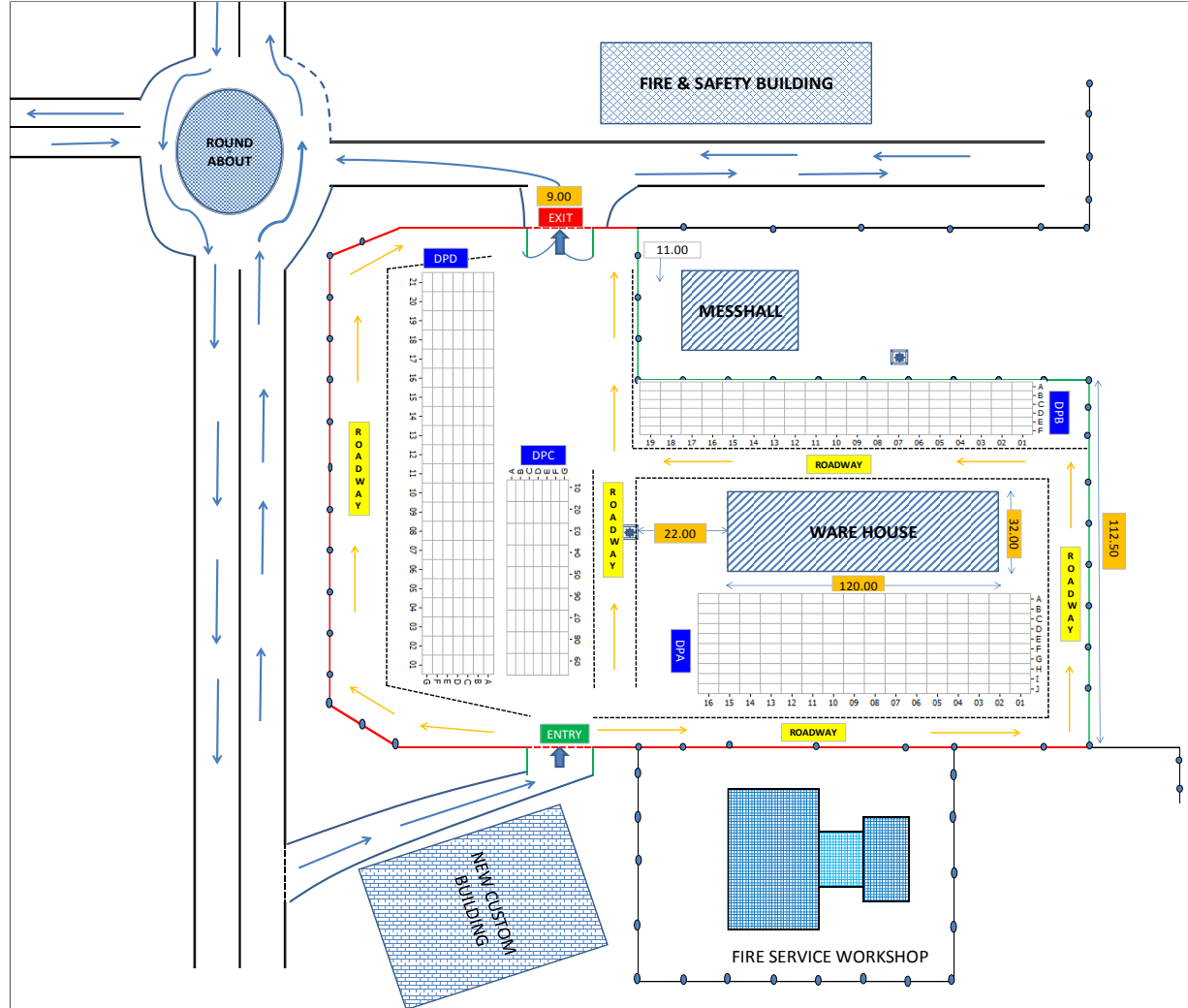


Petrochemical exporters

- Ample availability of empty containers for exports;
- No repositioning cost;
- Reduced administrative work hours;
- Reduced risks.

Jubail Commercial Port - capabilities

- A total port area of 45 Ha – with operating capacity of 1.5m TEU;
- Quay length of 1,000 m, with water draft of 14m chart datum;
- 5 Quay cranes, with supporting equipment including RTGs, Reach stackers, Tractor trailers and a plug capacity of 180 reefer points;
- 34,500 M2 non-bonded area is available for imports and exports requirements
- A fast and helpful Customs on site to ensure quick and efficient clearances



JCP is operated by GSCCO which is part of the Gulftainer (GT) Group



- GT is World's largest privately owned, independent port operator;
- GT has operated and continues to operate Khalid port in Sharjah, which was the first dedicated container terminal in the Middle East;
- KCT, recognized by JOC, as the fastest terminal in the Middle East, Africa & Europe is operated by GT;
- Gulftainer was named "The Port Terminal Operator of the Year" at the Seatrade Middle East, Indian Subcontinent & Africa Award 2017 and 2016
- Gulftainer won the Logistics Middle East Awards 2017 the "Best Technology Implementation of the year"
- Gulftainer was named "Port Operator of the Year" at the Lloyds List ME and Indian Subcontinent Awards 2015
- Gulftainer achieved British Safety Award for demonstrating a strong commitment to good health and safety management in 2014/2015/2016

Gulftainer's business areas



Contract Logistics



Container Repair



Port Management



Logistics Cities

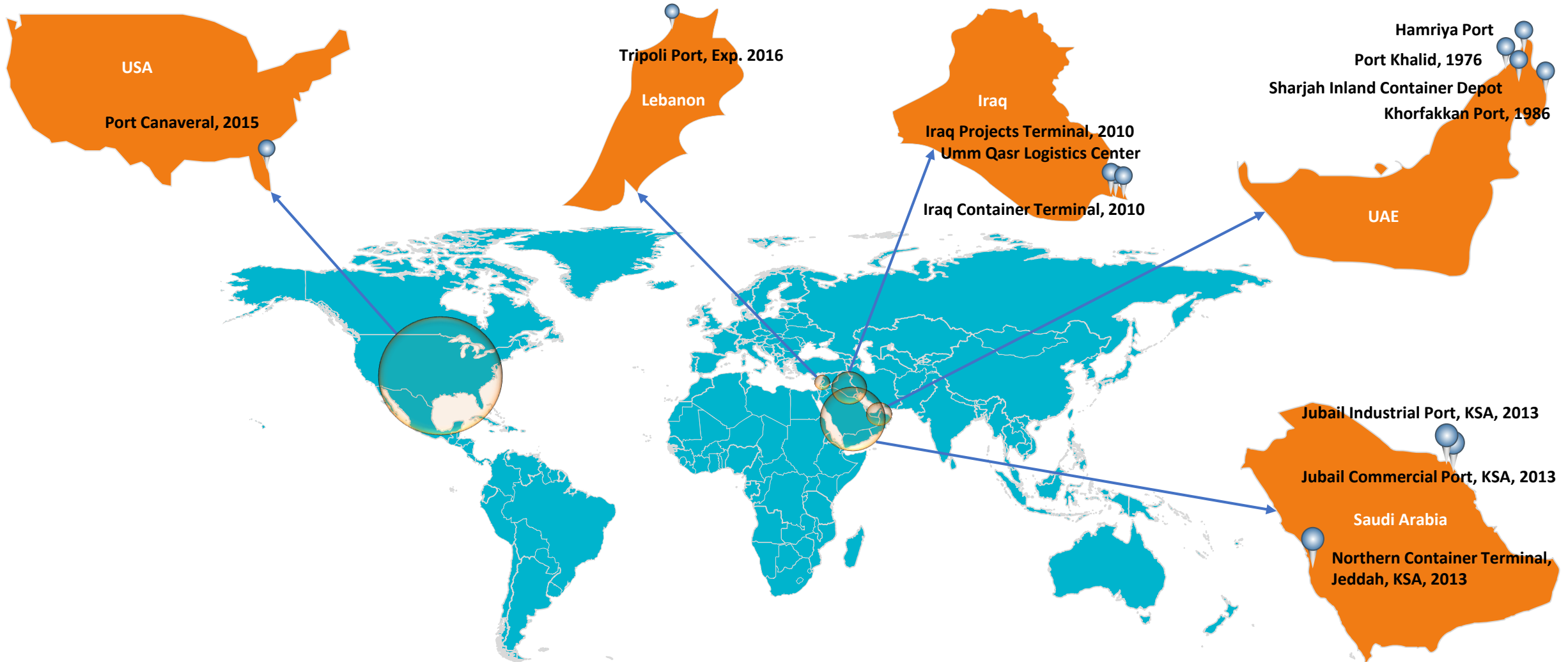


Freight Forwarding



Inland Transportation

Gulftainer's Operations



Thank you



> Terminal Management



> Supply Chain Management



> Container Repair

Saleem Kadernani
Group Commercial Manager



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> International Port Management



> Gulftainer Shipping Agency



> Inland Container Depot

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> Inland Transport



> Logistics Cities