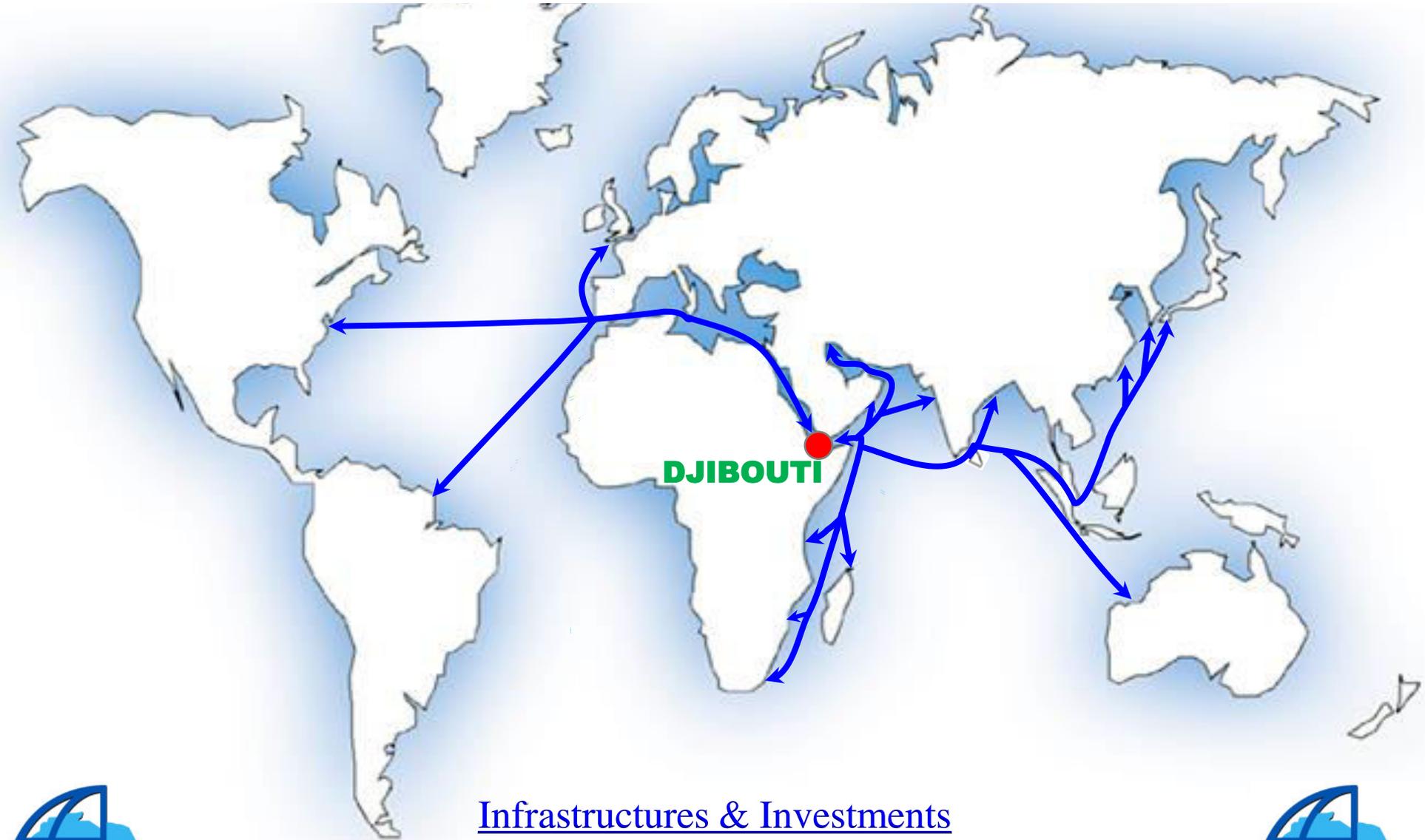


Strategic Location



Infrastructures & Investments
in Ports, Free Zones and Maritime related Business Activities

Aboubaker Omar Hadi

Chairman of Djibouti Ports and Free Zones Authority



- 1. Djibouti Overview**
 - 2. Africa Maritime Facade Overview**
 - 3. Existing Infrastructures**
 - 4. Infrastructures Expansions**
 - 5. Future Mega-Projects**
 - 6. Summary of Development Projects**
 - 7. Great Horn's Projects in South Sudan & Somalia**
- 
- A watermark logo is centered in the background. It features a stylized globe with a grid of latitude and longitude lines. Overlaid on the globe is a map of the African continent, with Djibouti highlighted in a light green color. Below the globe, the text "Djibouti" is written in a large, bold, grey font, and "Ports & Free Zones Authority" is written in a smaller, grey font below it.

Djibouti Overview



- Independent since 1977
- Area: 23,200 Km²
- Currency: Djibouti Franc has fixed parity with US Dollars since 1949
- Main economic sector is the port and port-related activities
- Gross Domestic Product per capita:

Year	2009	2010	2011	2012	2013	2014 Forecast
USD	1199	1258	1346	1440	1517	1615

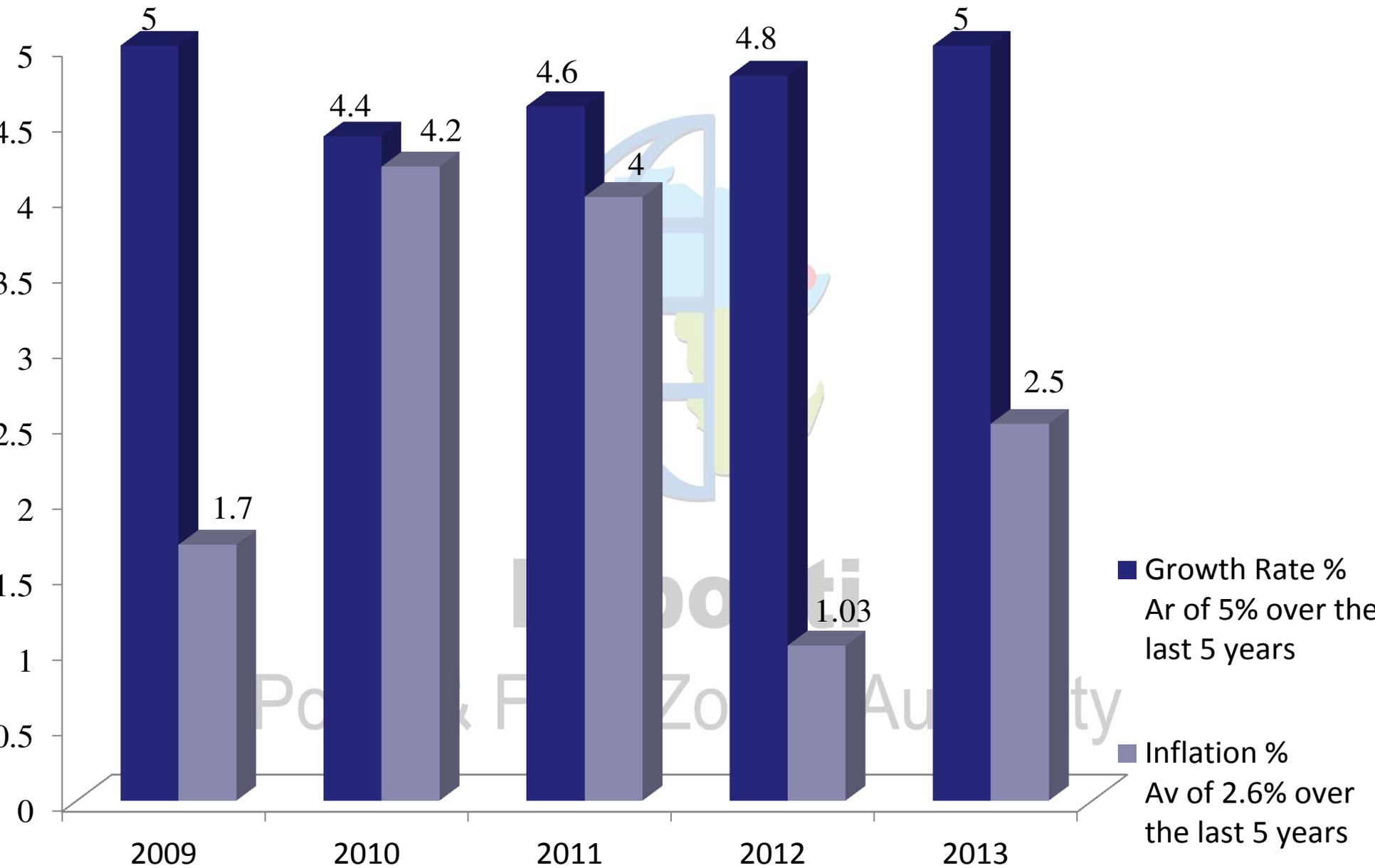
- Economy based on Ports & related activities : 78% of the GDP

- Member of

- COMESA
- AGOA
- IGAD
- ACP

Ports & Free Zones Authority

Djibouti Macroeconomic Indicators



Africa Maritime Facade Overview

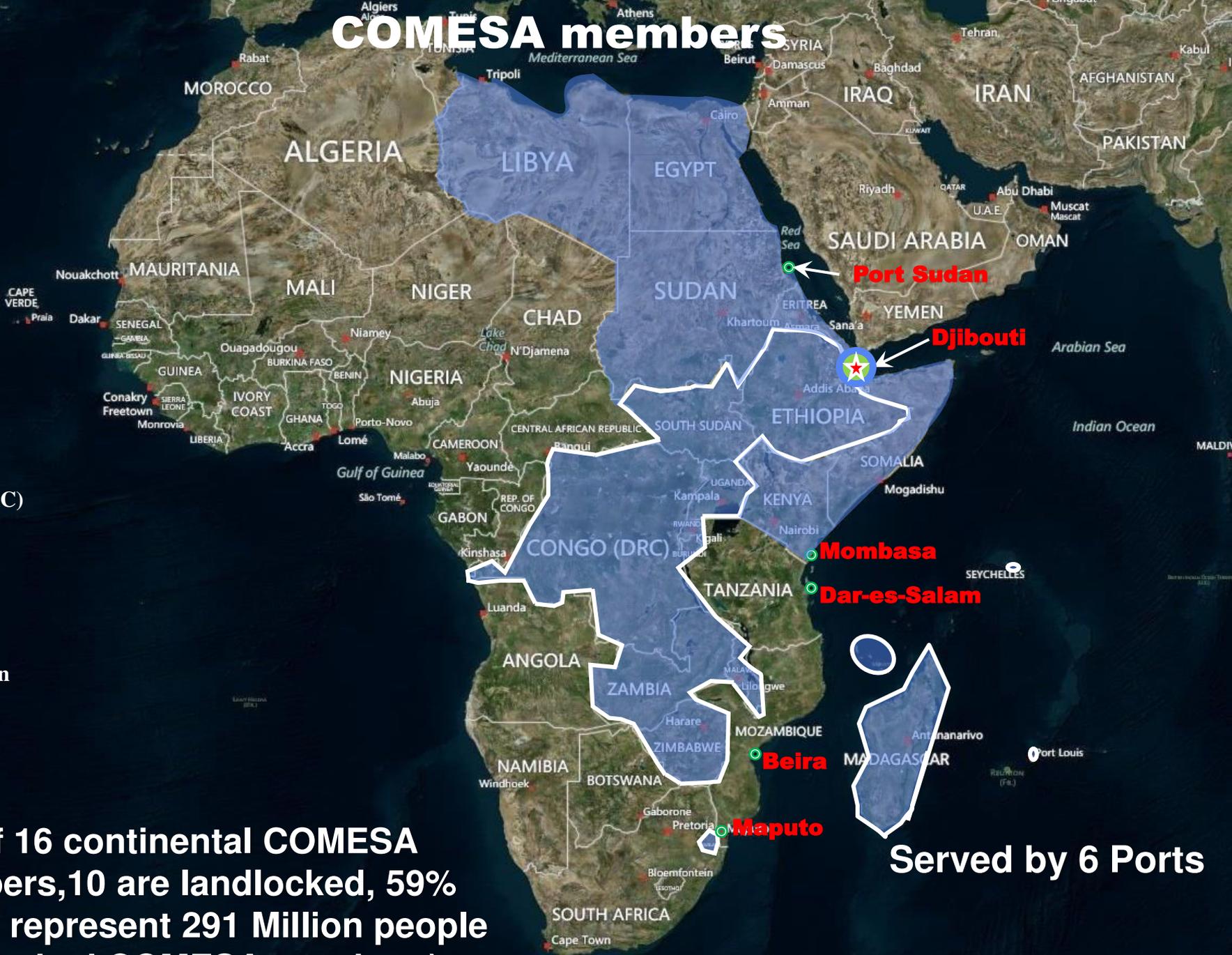


22 Coastal Countries
Average of 731Km
42 ports

9 Coastal Countries
Average of 1423Km
20 ports

17 landlocked countries in the Continent

COMESA members

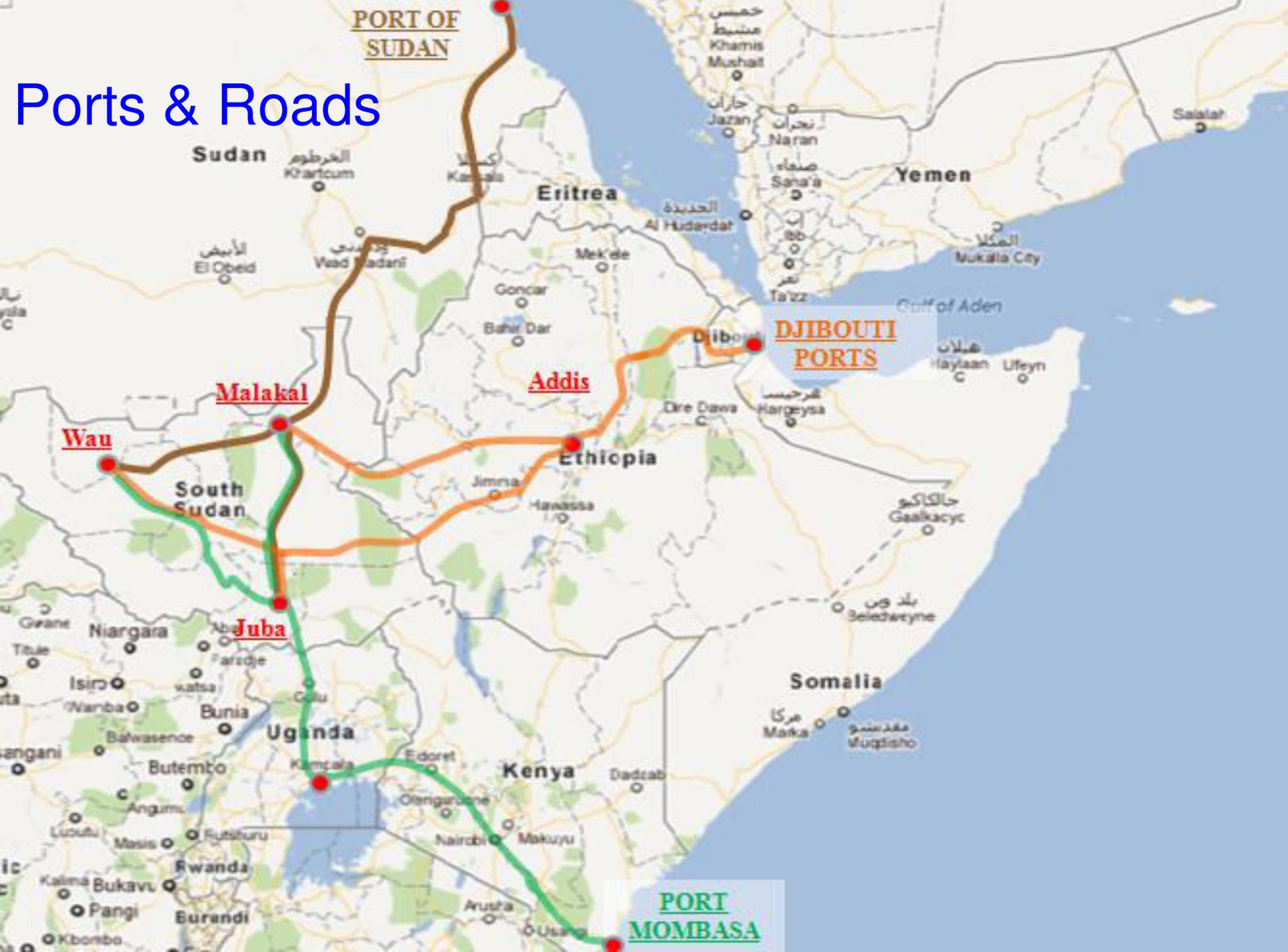


- Ethiopia
- Congo (DRC)
- Uganda
- Malawi
- Zambia
- Zimbabwe
- Rwanda
- South Sudan
- Burundi
- Swaziland

Out of 16 continental COMESA members, 10 are landlocked, 59% which represent 291 Million people (landlocked COMESA members).

Served by 6 Ports

Ports & Roads





Existing Infrastructures

Ports & Free Zones Authority



Djibouti

Ports & Free Zones Authority

Facilities: A Performant Logistics Platform

Port of Djibouti SA (4100 m of berth)

- **Multi Purpose Port: 3200m of berth**
- **Bulk Terminal: 500m of berth**
- **Container Terminal :400m of berth**
- **with RoRo berth , 12m berth depth.**



PORT OF DJIBOUTI SA



HDTL

- **Pumping capacity : 2000 T/hour/line**
- **Operation : 24 hours**
- **Depth : 20m**
- **Berths: Two.**

DCT

DCT

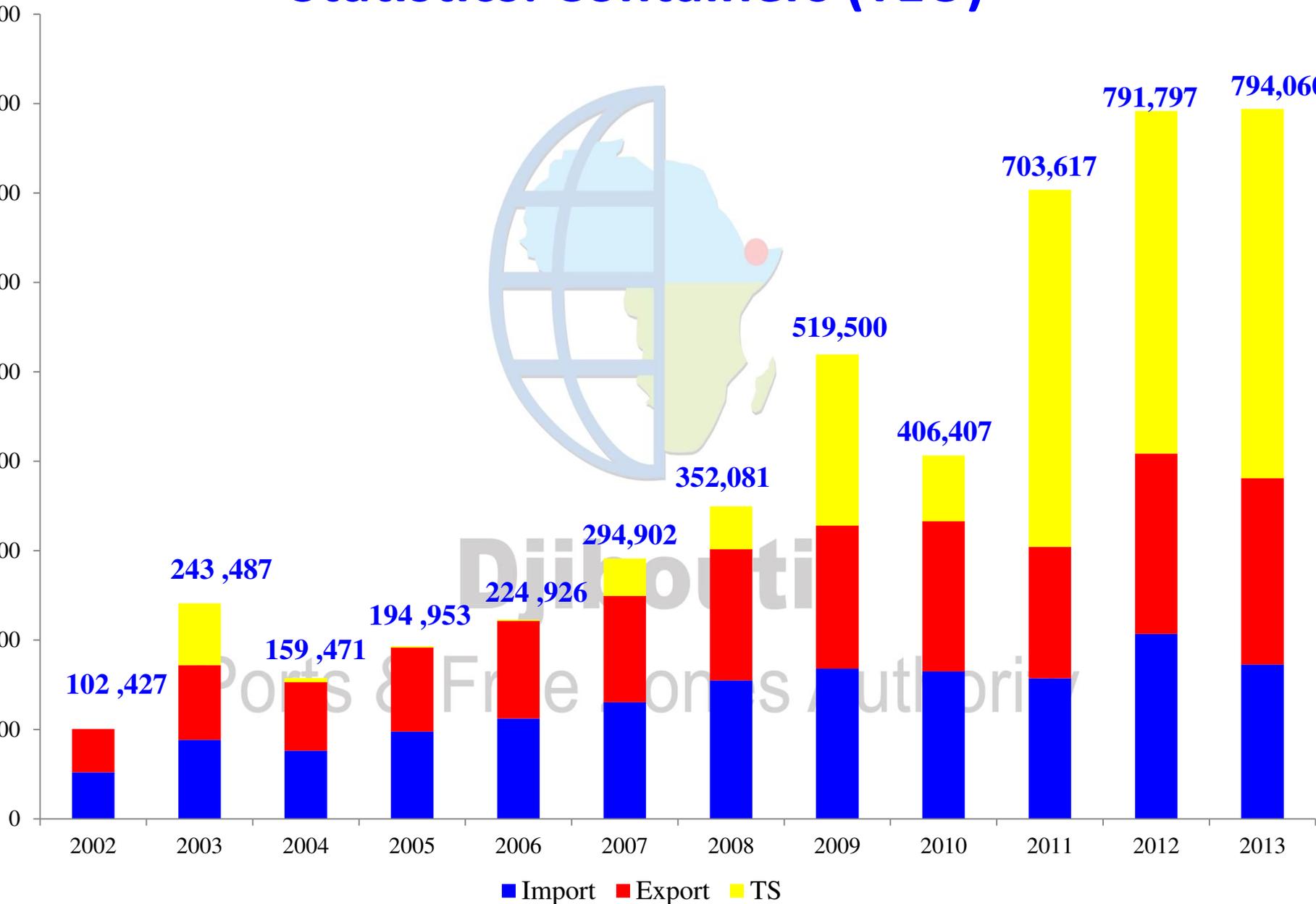
- **World Class Productivity: 34m/hr/crane average**
- **1050m of berth, 18m berth depth.**



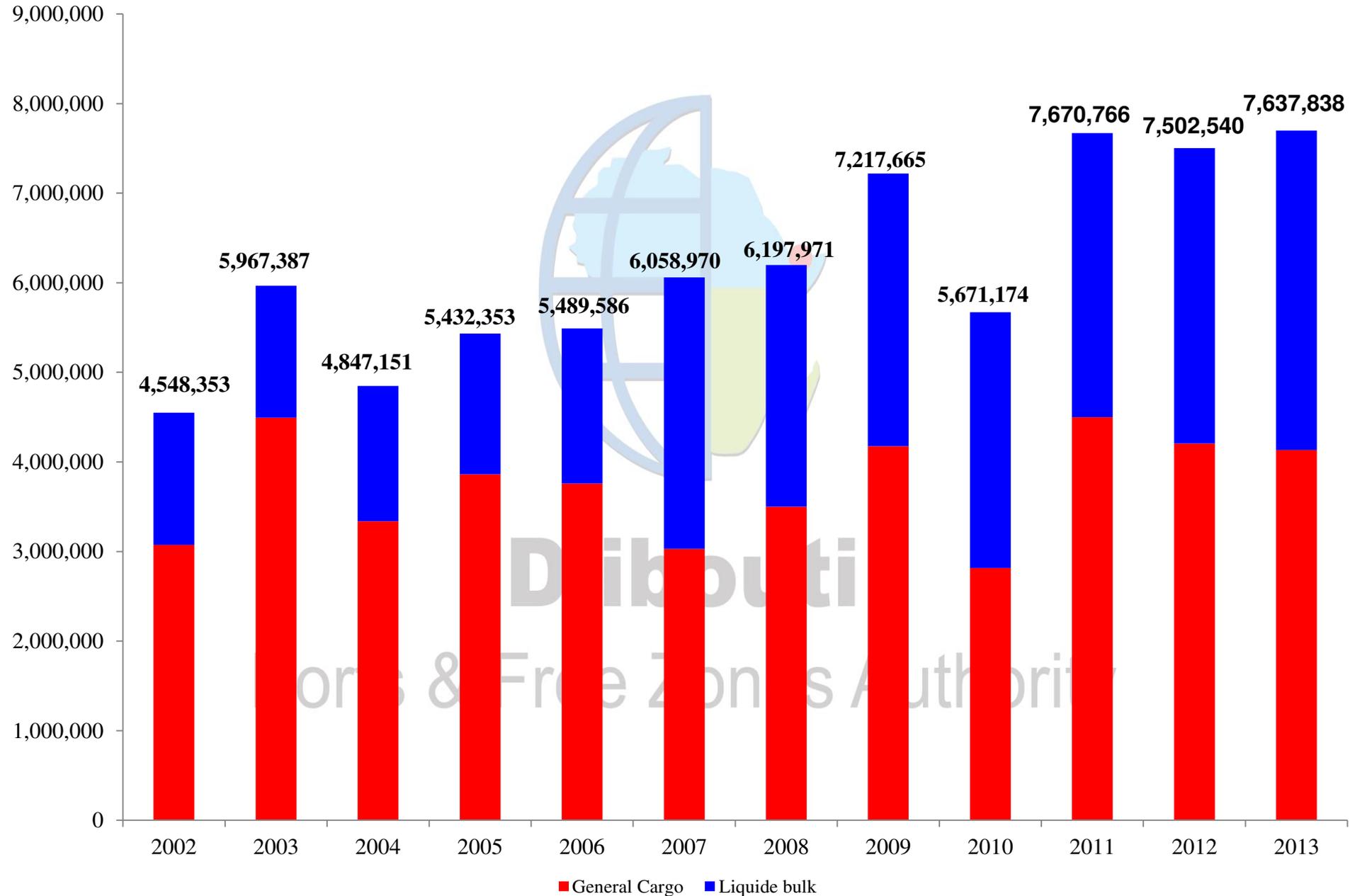
DFZ

- **No corporate Tax; One Stop Shop; Open a company within 48 hours**
- **189 Free Zone companies registered with DPFZA; 39 Nationalities ; 68% from overseas;**
- **Office space, warehouses, Light Industrial Units ,hangar and serviced land.**

Statistics: Containers (TEU)



Statistics: Non Containerized (Metric Tone)





Infrastructure Expansions

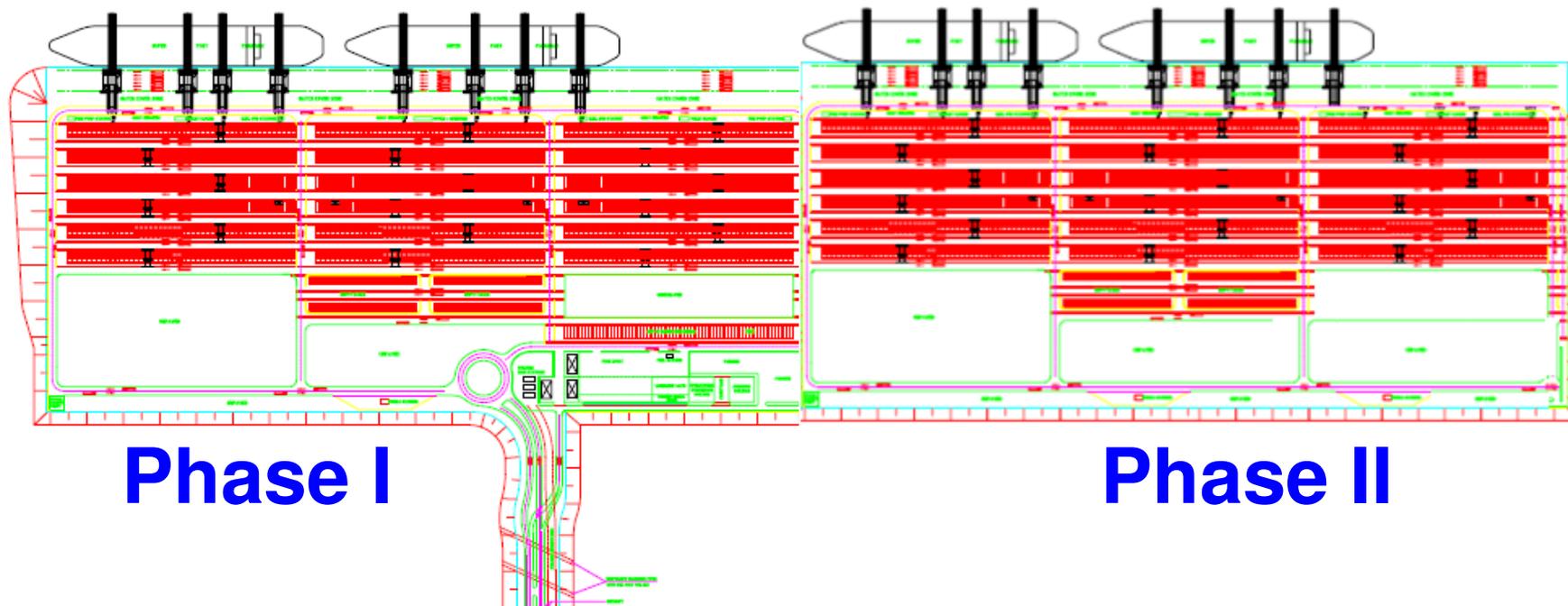
Djibouti

Ports & Free Zones Authority

DCT:Phase II

- 1050m quay length
- 18m draught
- 8 Super Post Panamax quay cranes
- 24RTG
- 1.6 million TEU capacity

- 2nd quarter 2015
- 950m quay length to reach a total of 2000m
- 3 million TEU capacity
- Employment: :
 - Construction phase: 500
 - Operation phase: 700





: Phase II



LPG Expansion

Storage Tanks Expansion

- **Oil Terminal: Phase II of the Oil Terminal Construction will start in 4th quarter 2014;**
- **30% capacity increase ;**
- **Employment:**
 - **Construction phase: 250;**
 - **Operation phase: 30.**



Future Mega-Project

Ports & Free Zones Authority

Future Mega-Projects



13



1



2



9



15

18

2



3



4



8

5



10



6

12



11



7



14

- 1.** Ship Repair Yard
- 2.** Port of Tadjourah
- 3.** Port of Ghoubet
- 4.** Djibouti Multipurpose Port
- 5.** LNG Terminal
- 6.** Crude Oil Terminal
- 7.** Damerjog Livestock Port
- 8.** Business District
- 9.** Tadjourah-Mekele Railway
- 10.** Djibouti-Addis Abeba Railway
- 11.** Damerjog Free Zone
- 12.** Jabanas Free Zone
- 13.** Ras-Siyan Airport
- 14.** Bicidley International Airport & Cargo Village
- 15.** Djibouti Shipping Company



Djibouti

Ports & Free Zones Authority

Ship Repair and Drydocks

Total Investment
of 400 Million USD



➤ Employment: :

- Construction phase: 1000
- Operation phase: 8000

Off the sea coast of Djibouti, one of the busiest maritime route in the world, and lack of ship repair yard facility in the region :

- feasibility study underway;**
- Project will start at the 1st quarter 2015.**



PORT DE TADJOURA

Total Investment
Of 160 Million USD

- Under construction in the North coast of Djibouti;
- Mainly for bulk commodities like the Potash;
- Traffic of 4 Million Tons /year of potash, operational March 2016 (1st phase).



- Employment: :
 - Construction phase: 600
 - Operation phase: 700
 - Indirect: 2000

DJIBOUTI MULTI-PURPOSE PORT PHASE I+II

**Total Investment of
580 Million USD**



➤ **Operational at the 4th quarter 2016;**

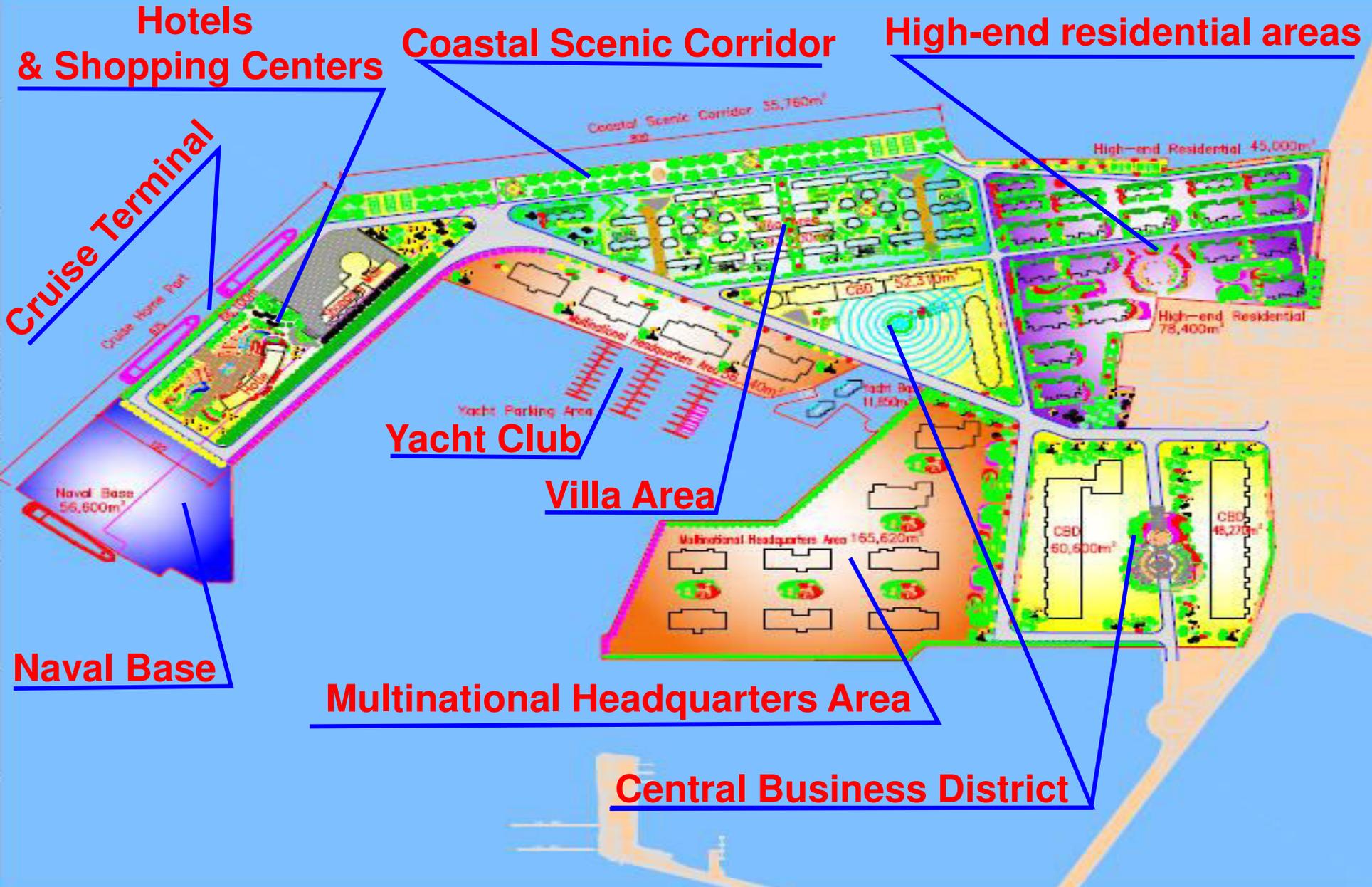
➤ **Employment: :**

• **Construction phase: 2000**

• **Operation phase: 800**

Business District

Under study



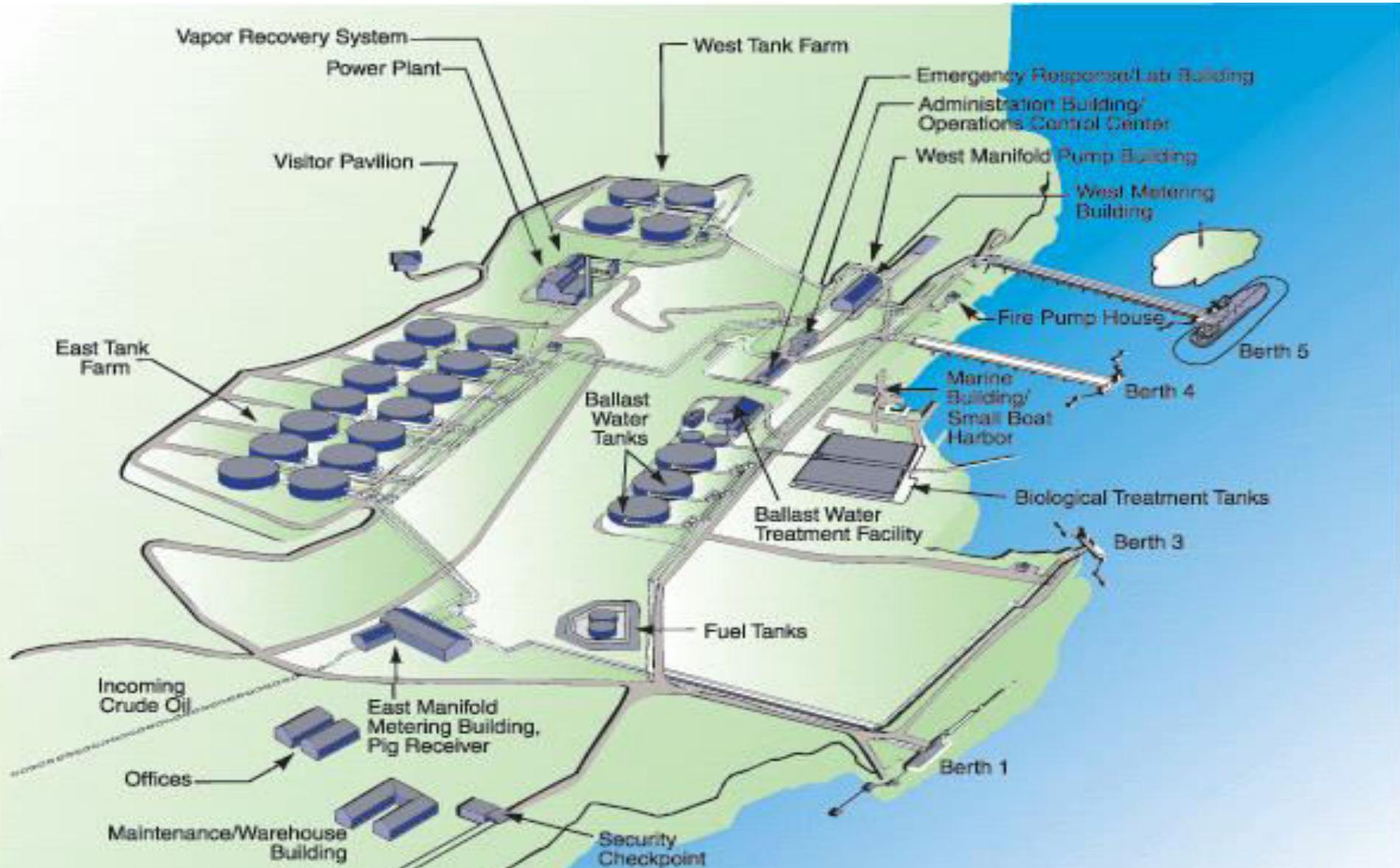
DCT 2

Total Investment of
1 Billion USD



Crude Oil Terminal

Total Investment of 200 Millions USD



The project will be start at the 2nd quarter 2015.

LNG Terminal

Total Investment
of 3 Billion USD



- **Employment: :**
- **Construction phase: 600**
 - **Operation phase: 200**

Damerjog Livestock Port

Total Investment
Of 70 Million USD



- **Capacity 10 million heads of livestock/year, operational at the 4th quarter 2016**
- **Employment: :**
 - **Construction phase: 400**
 - **Operation phase: 400**

Railway Projects

- **Tadjourah-Galafi : 124Km ;**
- **Total Investment of 600 Million USD**
- **Employment: :**
 - **Construction phase: 700**
 - **Operation phase: 200**

- **Djibouti-Galilleh: 98Km; Total Investment of 550 Million USD**
- **Employment: :**
 - **Construction phase: 700**
 - **Operation phase: 200**

Trans-African Railways

Potential container traffic of 42.1 M TEUs



Damerjog Free Zone

Under study

- **Industrial Free Zone;**
- **3500 Hectares;**
- **Including Livestock Free Zone, FIRST PLACE IN THE WORLD;**
- **To be developed in several phases;**
- **Employment: :**
 - **Construction phase: 600;**
 - **Operation phase: 75000.**





Djibouti

Ports & Free Zones Authority

Jabanas Free Zone

Total Investment
Of 70 Million USD



A 3D architectural rendering of the Ras-Siyan Airport terminal building. The terminal has a long, low profile with a large, curved, metallic roof and extensive glass facades. Several commercial aircraft are parked at gates or taxiing on the tarmac. The aircraft include an Emirates plane, a Lufthansa plane, an Ethiopian Airlines plane, an Air Arabia plane, and an Flydubai plane. The surrounding area is landscaped with palm trees and green lawns. In the top right corner, there is a small inset image of a red and white aircraft in flight.

Ras-Siyan Airport

**Total Investment
Of 100 Million USD**

•Runway of 3 km & 60 m wide

•350,000 passengers/year in 2016 & expandable to 767,400 passengers/year in 2021

➤ Employment: :

•Construction phase: 200

•Operation phase: 250

Bicidley International Airport & Cargo Village



➤ Employment :

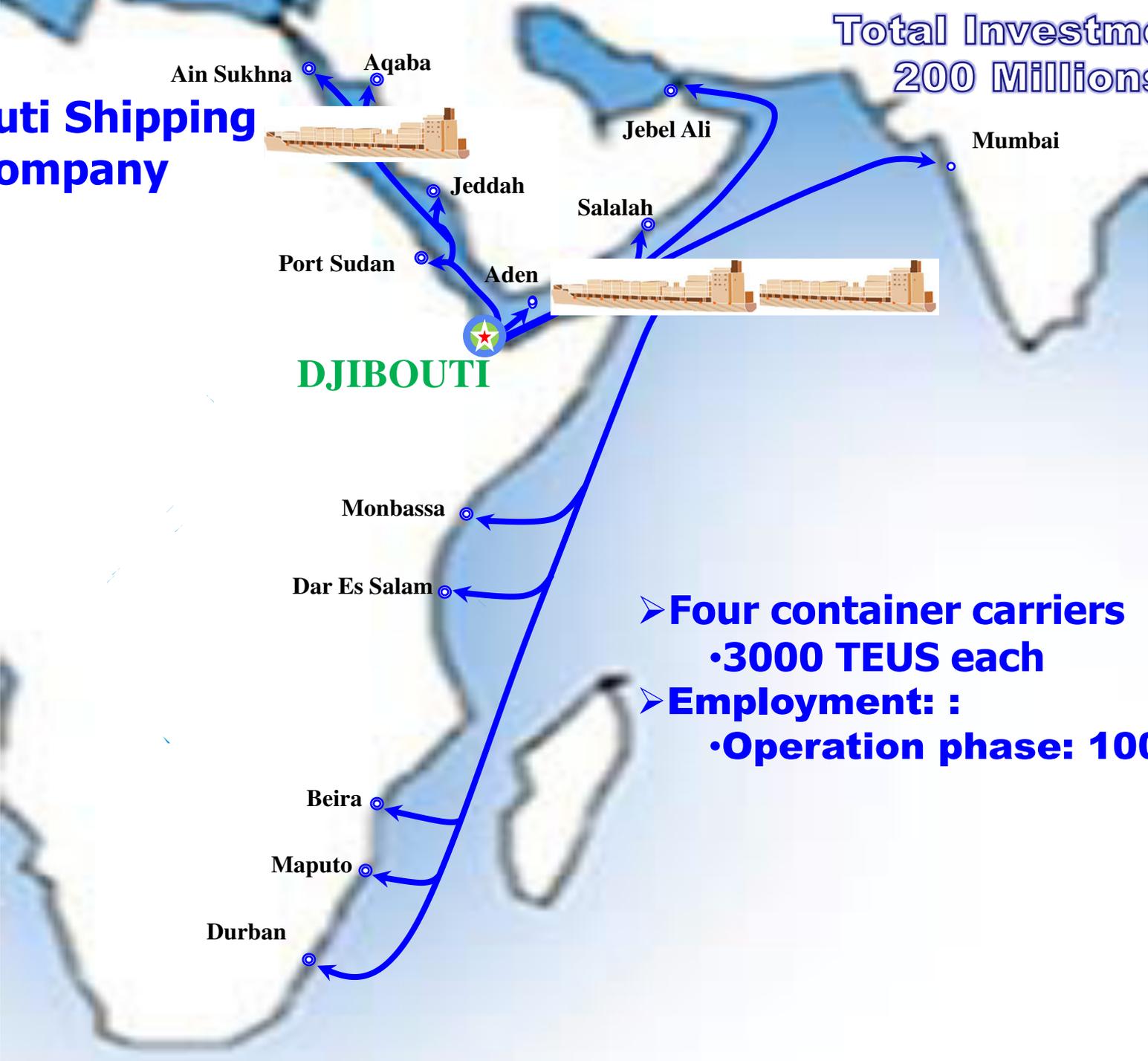
- Construction phase: 2000
- Operation phase: 900

**1.VIP Terminal 2.Fuel Area 3.Maintenance Hangar 4.Cargo Terminal
5.Passanger Terminal 6.Runway 7.ARFF (Fire Fighting building)
8.Control Tower**

Total Investment of 450 Million USD

Total Investment of 200 Millions USD

Djibouti Shipping Company



Ain Sukhna
Aqaba

Jebel Ali

Mumbai

Jeddah

Salalah

Port Sudan

Aden

DJIBOUTI

Monbassa

Dar Es Salam

Beira

Maputo

Durban

- **Four container carriers**
 - 3000 TEUS each
- **Employment: :**
 - Operation phase: 100

Summary of Development Projects in Djibouti ports, free zones and maritime related business activities

Projects	Cost of Studies USD	Start of studies	Start of Project	Total Cost of Project (millions USD)	Finance	Employment	
						Construction phase	Operation phase
Ship Repair & Drydocks	350 000	2013	1 st quarter 2015	400	Not yet Secured	1 000	8 000
Development activities of the fishing port	200 000	2014	2015	20	Secured	150	100
Bicidley Airport & Cargo Village (Phase I)	700 000	December 2013	4 th quarter 2015	450	Secured	2 000	900
JABANAS Free Zone in PK12	600 000	2012-2013	4 th quarter 2014	70	Secured	400	3 000
Doraleh Container Terminal 1 Phase I b Phase II	Internal study	Completed	2013	30	Secured	500	700
	1 000 000	In progress	4 th quarter 2015	300	Secured		
DCT2	2 800 000	May 2014	2 nd quarter 2015	1000	Not yet Secured	500	400
Djibouti Multipurpose Port	2 500 000	3 rd quarter 2013	1 st August 2014	580	Secured	2 000	800
Business District	Under study	Under study	Under study	Under study	Under study		
Djibouti-Galilleh Railway	2 000 000	Completed	7 th July 2013	550	Secured	700	200
Tadjourah-Galafi Railway	2 000 000	2 nd quarter 2013	2 nd quarter 2015	600	Secured	700	200
Ras-Siyan Airport	Under study	Under study	Under study	100	Secured	200	250

Projects	Cost of Studies USD	Start of studies	Start of Project	Total Cost of Project (millions USD)	Finance	Employment	
						Construction phase	Operation phase
Damerjog Livestock Port	700 000	Completed	1 st August 2014	70	Not yet Secured	400	400
Port of Ghoubet Export of salt from Lake Assal	2 500 000	Completed	4 th April 2013	64	Secured	600	300 direct 400 dockers 300 to 400 at Lac Assal
Port of Tadjourah (Potash / Mineral)	820 000	Completed	12 th December 2012	80	Secured	600	700
Phase I			3 rd quarter 2016	80	Not yet Secured		
HDTL (Oil Port)	500 000	2 nd quarter 2012	2 nd quarter 2015	60	Secured	250	30
Storage tanks / Refined products			1 st quarter 2015	7	Secured		
LPG	300 000	1 st quarter 2012	1 st quarter 2015	7	Secured		
LNG	2 500 000	End of 2013	2015	2600	Secured	600	200
Crude Oil Terminal	1 000 000	End of 2013	2 nd quarter 2015	200	Secured	300	200
Damerjog Free Zone	1 000 000	End of 2013	To be determined	To be developed in several phases	Not yet Secured	600	75000
Djibouti Shipping Company	1 000 000	4 th quarter 2012	1 st quarter 2015	200	Not yet Secured		100
Djibouti –Galileh Toll Road	3 000 000	August 2013	3 rd quarter 2015	570			
TOTAL PROJECT				8431		11 000	91 880

Total Investment

The coming 3 years, we are going to invest over 8.431 Billion USD on the development of ports and maritime related business activities.



79% of the total amount of 8.431 Billion USD has already been secured.

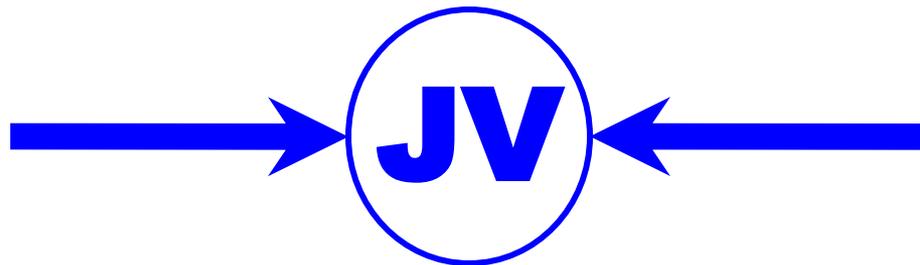
Djibouti
Ports & Free Zones Authority



Djibouti

Ports & Free Zones Authority

(51%)



招商局

CHINA MERCHANTS GROUP

Since 1872

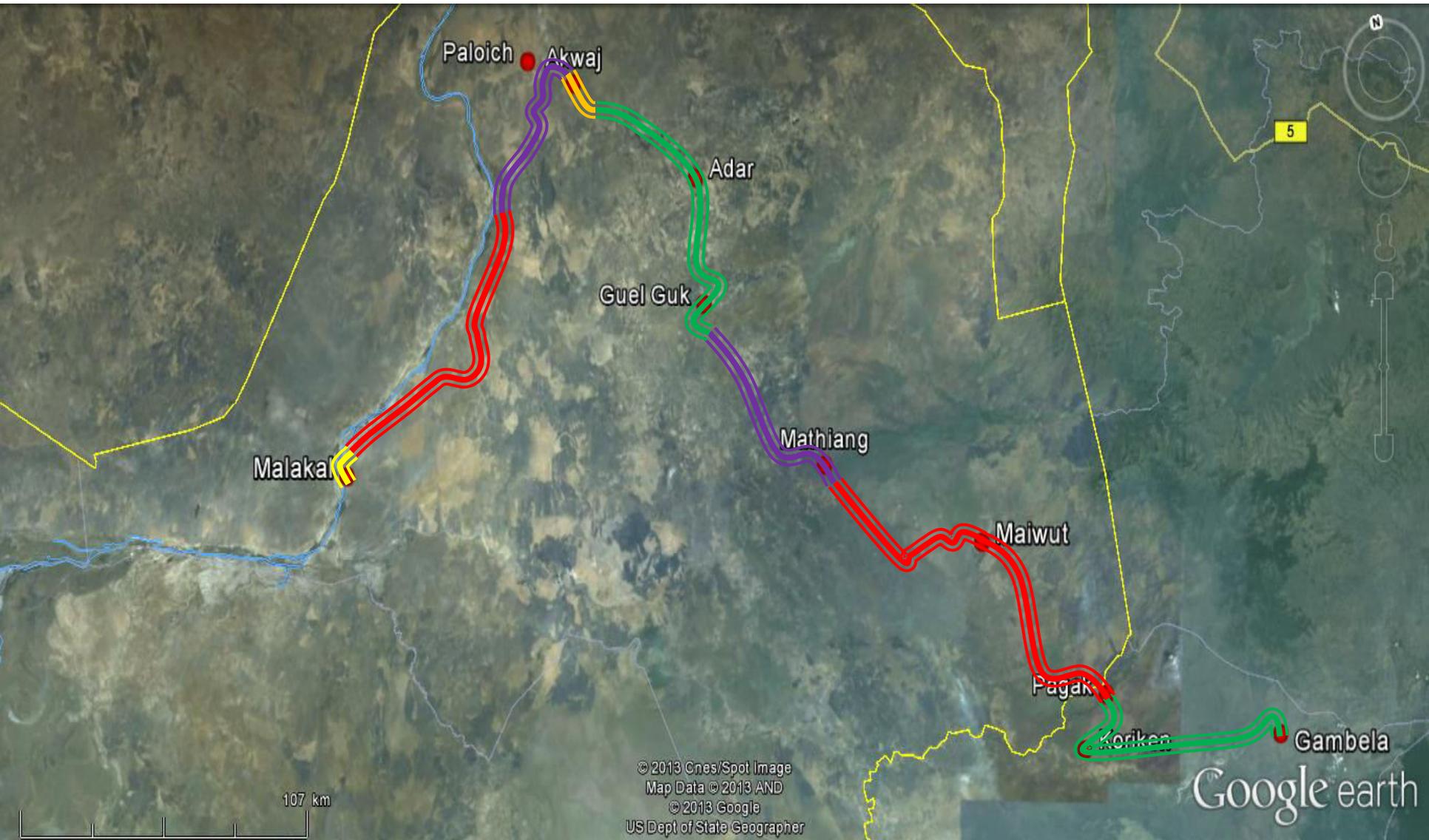
(49%)



Great Horn Development Company

**'s Projects
in South Sudan & Somalia**

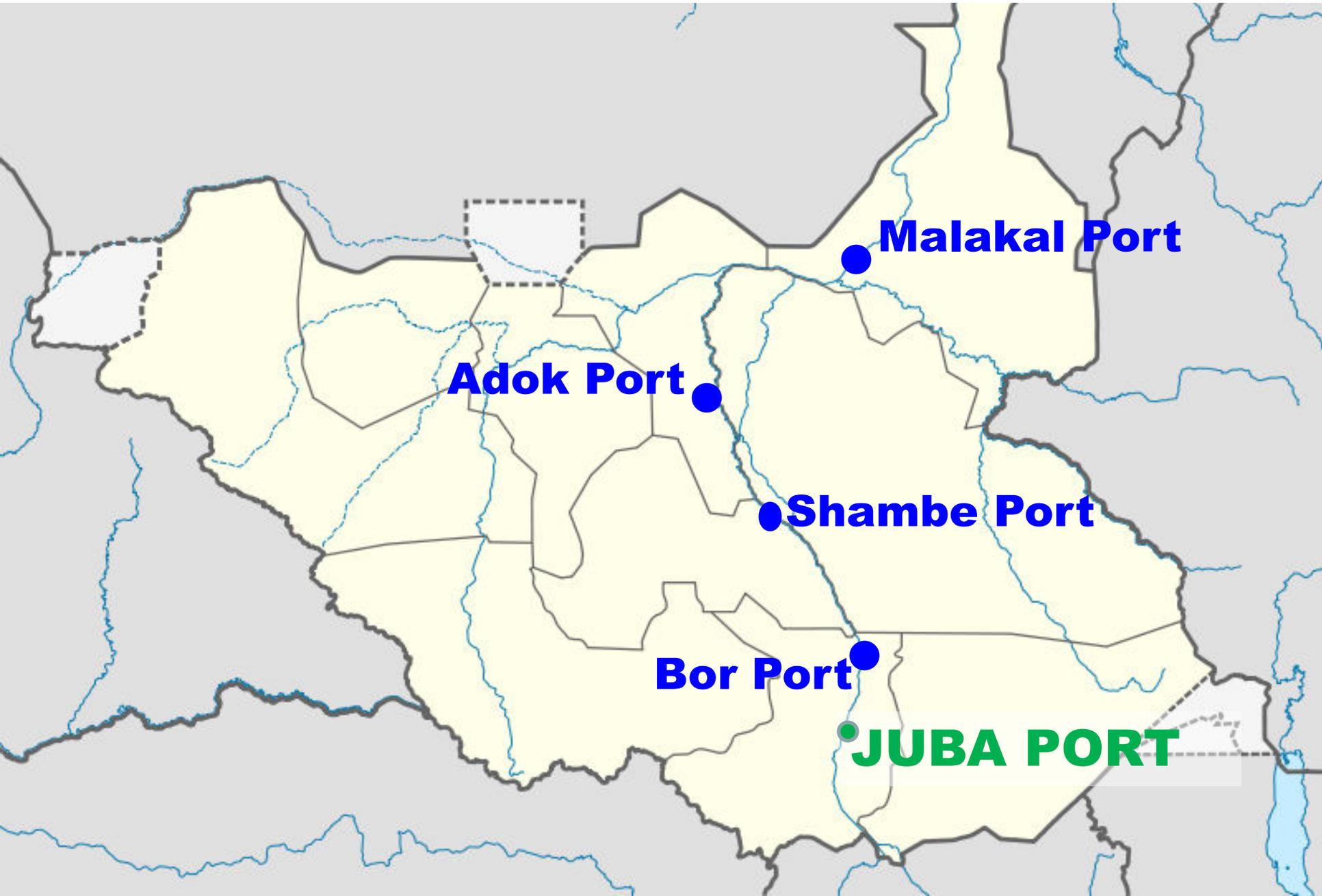
Great Horn's projects on the road (Pagak-Paloich)



- Tarmac (All season)
- Gravel/Sand (All season)
- Gravel (All season)
- Clay Sand (Dry season)
- Black Cotton Soil (Dry season)

Other Findings: Weather; no rain was reported, the rainy season is expected to start sometime the 3rd week of May, therefore above all corridors will remain accessible until the beginning of the rains. The security situation is stable

Great Horn's projects on the river ports



Malakal Port

Adok Port

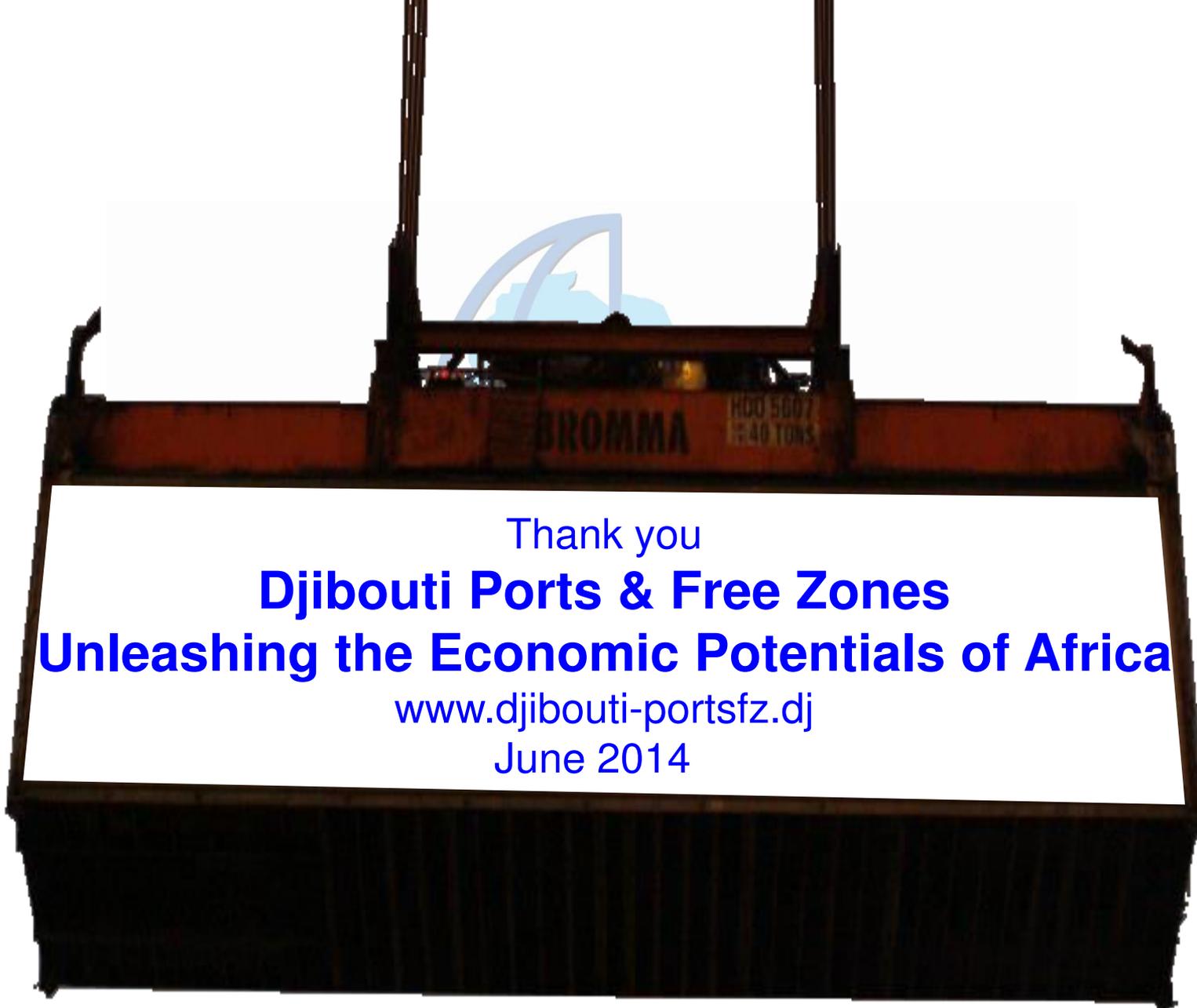
Shambe Port

Bor Port

JUBA PORT

Great Horn's projects on the ports





Thank you

Djibouti Ports & Free Zones

Unleashing the Economic Potentials of Africa

www.djibouti-portsfz.dj

June 2014