

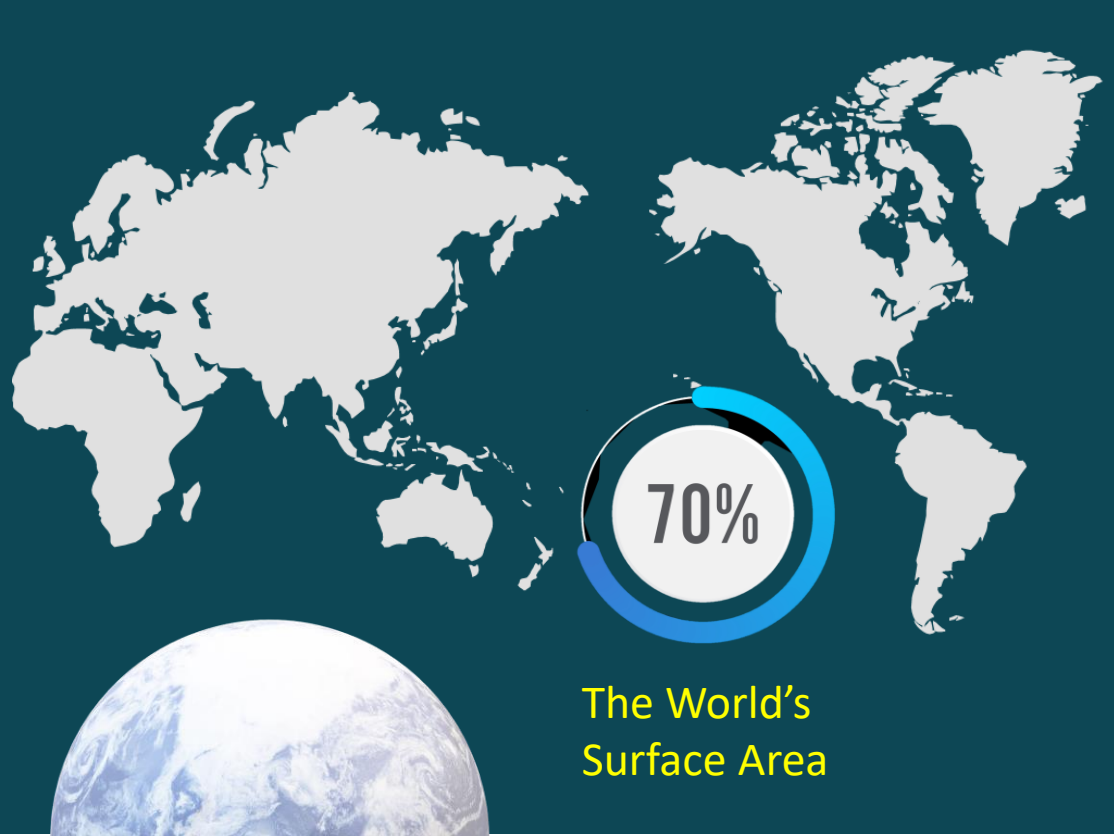
Supply Chain

Talk

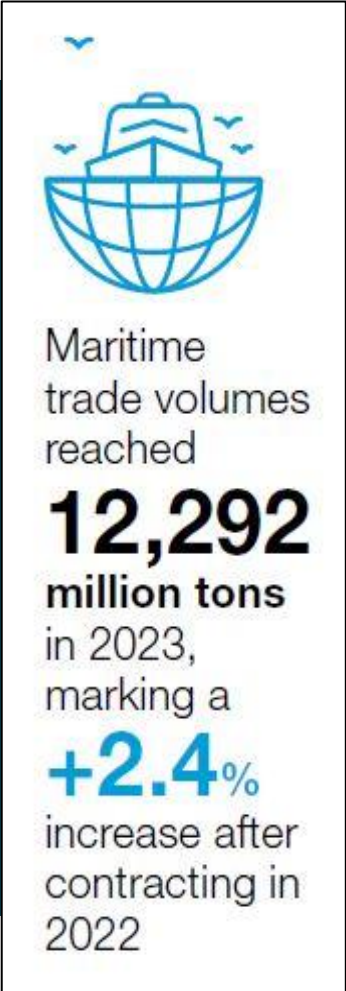


December 2024
Tabriz-Iran

World Maritime Trade – 2023/2024



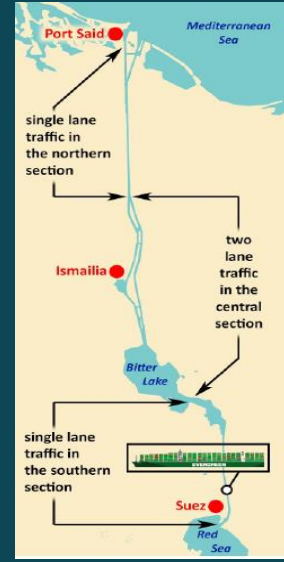
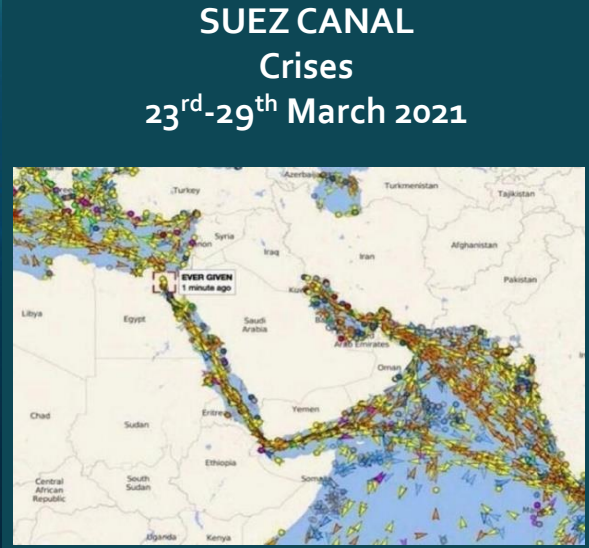
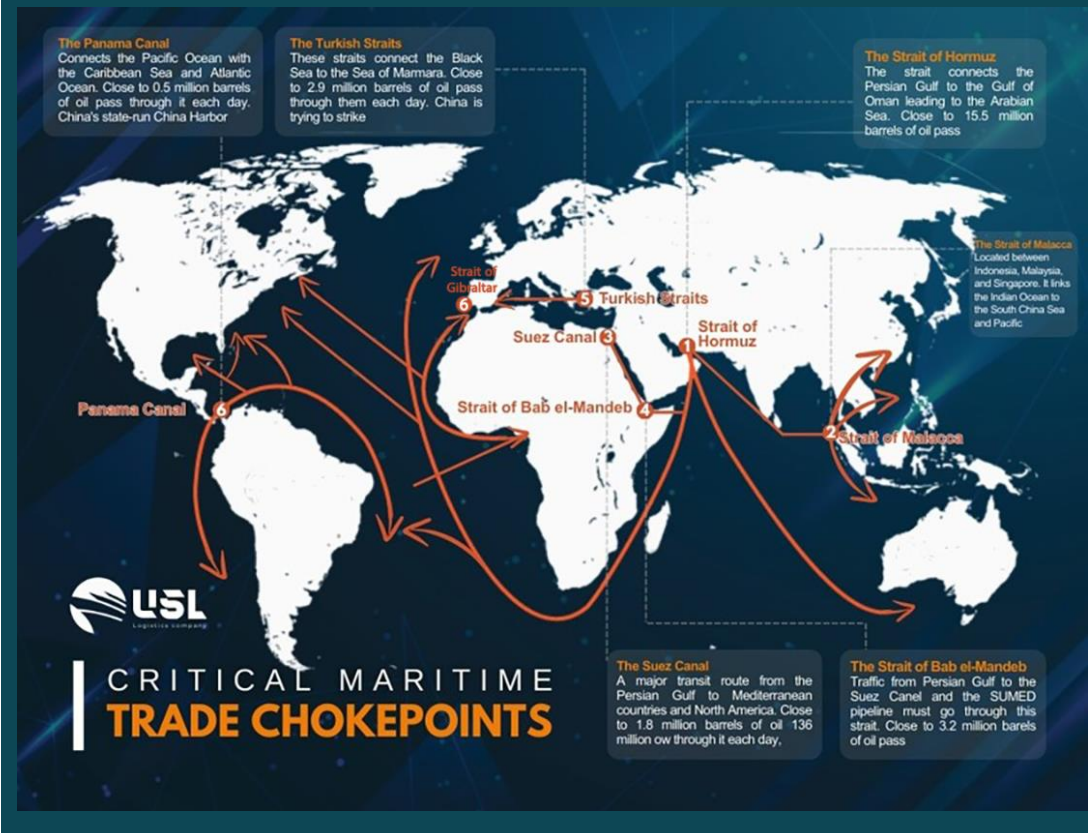
Source: UNCTAD calculations and forecasts published by Clarksons Research Services (July 2024).
 Note: UNCTAD projections are based on the estimated elasticities of maritime trade concerning GDP, export volumes and investment share in GDP, as well as monthly seaborne trade data published by Clarksons Research Services. They also build on the GDP forecast published in the IMF (2024).



Year	Total seaborne trade in tons	Containerized trade in TEU
2024	2.0	3.5
2025	2.5	2.9
2026	2.5	2.9
2027	2.4	2.6
2028	2.3	2.5
2029	2.3	2.5



World Maritime Trade – Crises in Checkpoints – Rerouting in Seaborn Trade



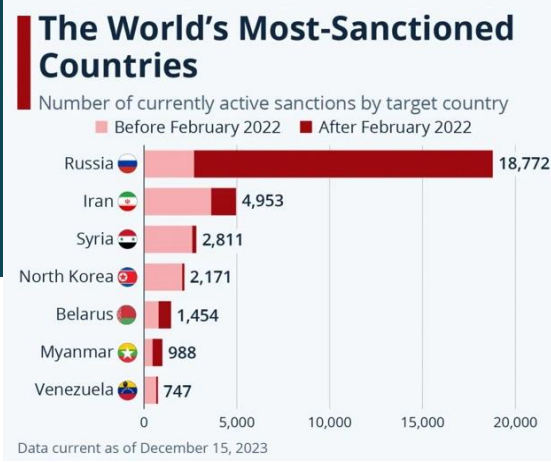
Russia and Ukraine Conflict
(22nd Feb 2022)



Al-Aqsa Storm
(7th October 2023)



Red Sea Crisis
(19th October 2023)



Shipping is the backbone of globalized trade and smooth navigation through maritime chokepoints is crucial for trade

New Trade Corridors –Russia/India/China



Mumbai to Novorossiysk
via Suez Canal

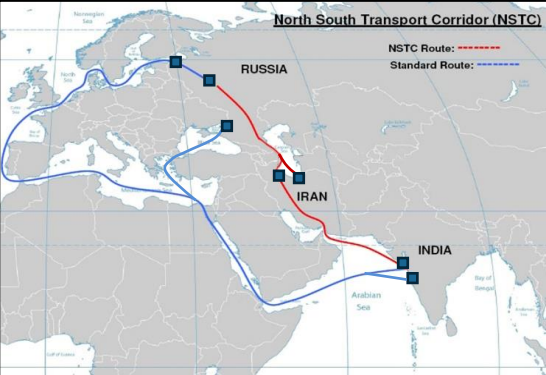


Chennai to Vladivostok



North Sea Route (NSR)

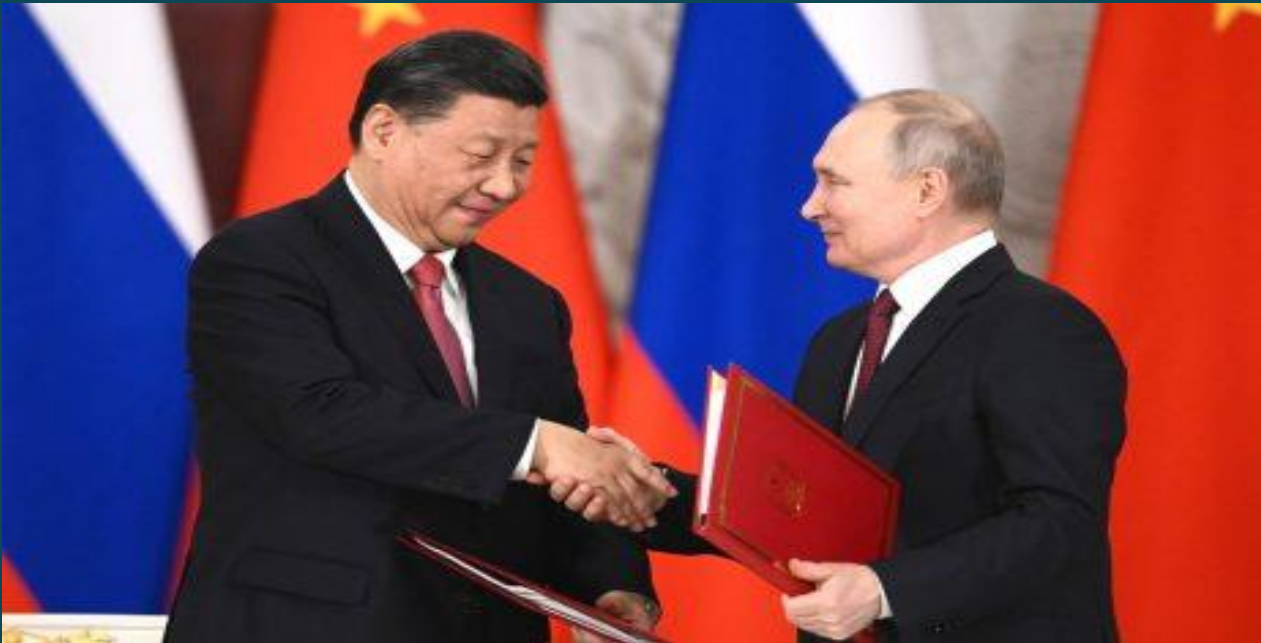
Russia Sea Born Trade 2023



Iran expected to experience more growth in handling transit cargoes via INSTC due to international sanctions against Russia as well as Increasing bilateral trade relations between New Delhi and Moscow. However, Russia and India (Iran's partners in the INSTC) have bypassed Iran by establishing a direct and regular shipping service between the main ports – Mundra and Nhava Sheva - and the Port of Novorossiysk located in Black Sea region of Russia.

Although Iran has made wide level of investments to develop the INSTC in its territory, Indian and Russian traders have found the established direct shipping service that passes through Suez Canal to be faster and more economical despite of all difficulties in Red Sea.

New Trade Corridors –Russia/China



Russia and China to develop Polar Silk Road

(10th June 2024)



Taking the Northern Sea Route can cut the journey times by up to two weeks



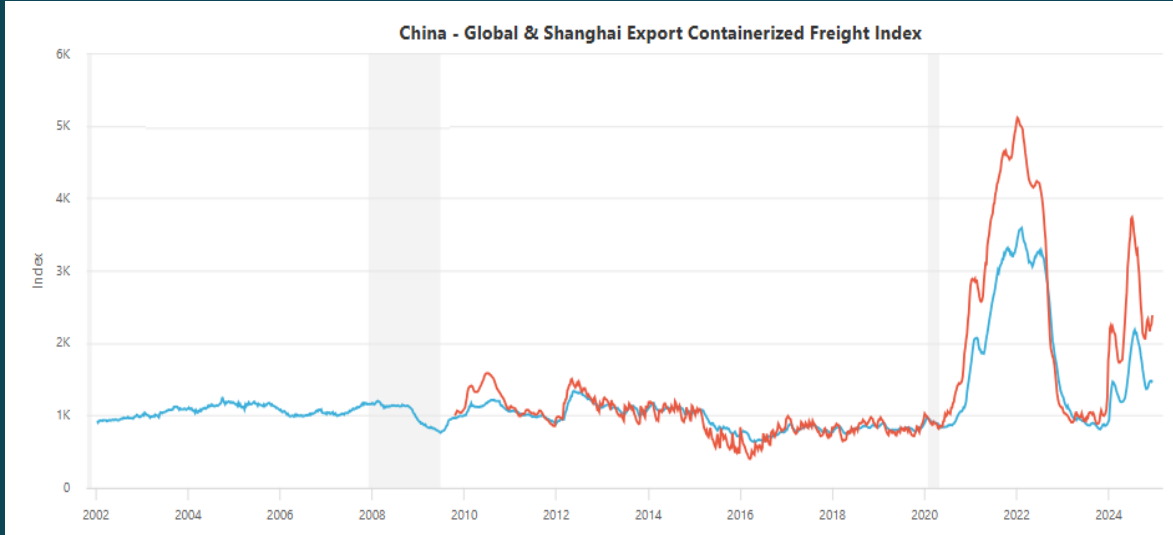
World Maritime Trade Challenges



Al-Aqsa Storm
(7th October 2023)



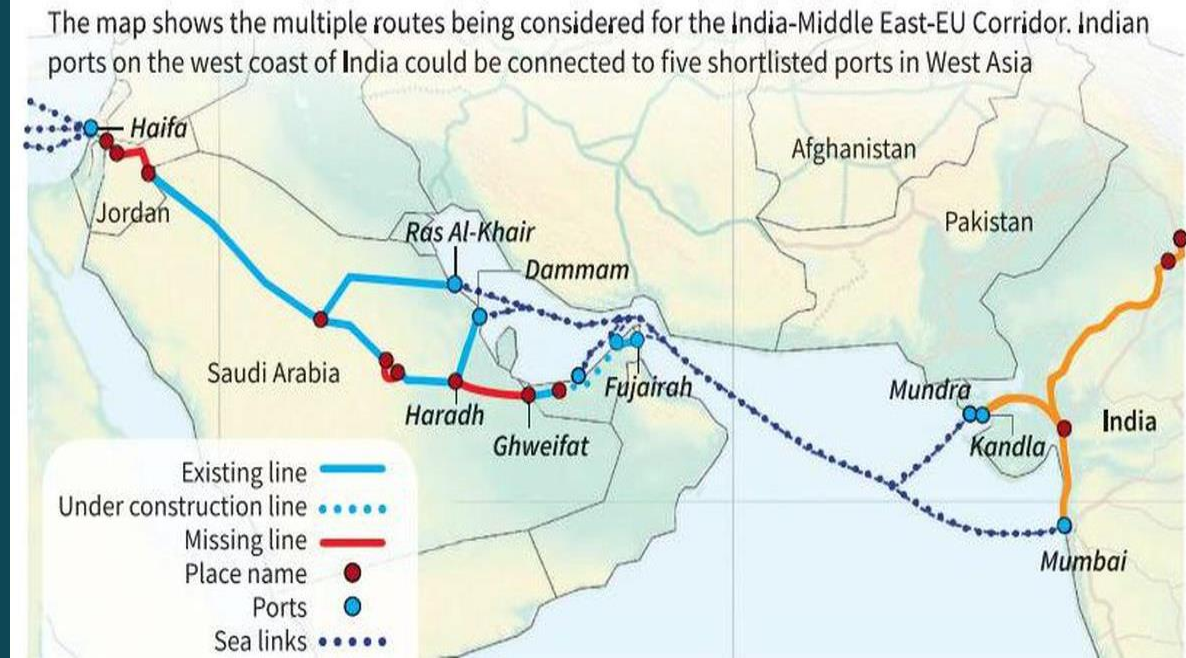
Red Sea Crisis
(19 October 2023)



New Trade Corridor - India Middle East Europe Corridor



G20 New Delhi Summit
(September 2023)



India Middle East Europe Corridor
(September 2023)



New Trade Corridor – Development Road



Development Road Project (Iraq, Turkey, UAE ,Qatar)

(22nd April 2024)



Persian Gulf to Turkey/Europe (Tariq ul Tamniah)



7th November 2024

"This project is scheduled for completion by 2025, and by the end of next year, the port may open in its first phase to receive ships, operating with five berths."

"Iraq has shortlisted 11 shipping companies to compete for the Grand Faw port operation contract, with a decision on the winners expected in January 2025, The shortlisted companies include China Merchants Port Group Co., Evergreen, CMA CGM, Mediterranean Shipping Company (MSC), India's Adani, Philippines-headquartered International Container Terminal Services (ICTSI), Cosco, and United Arab Emirates-based ABM Global Shipping LLC."

New Trade Corridor – Trans Afghan

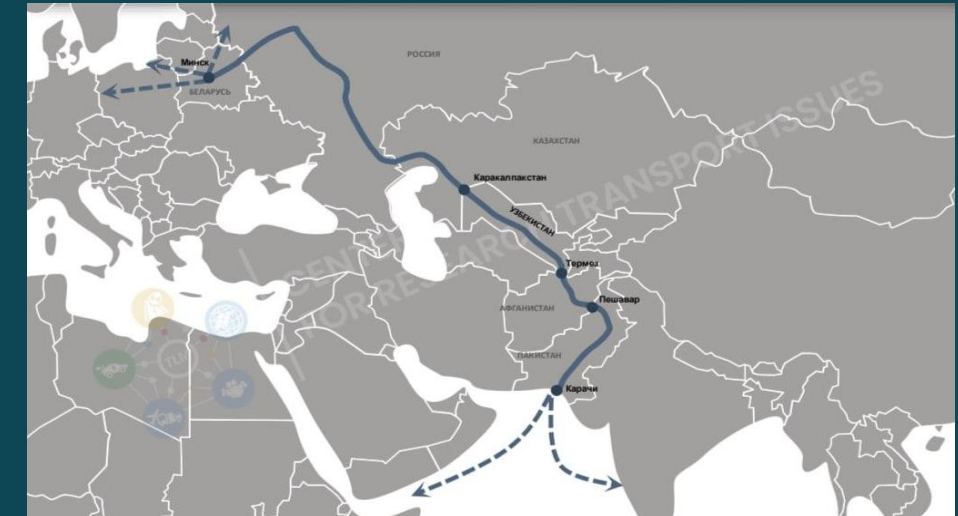


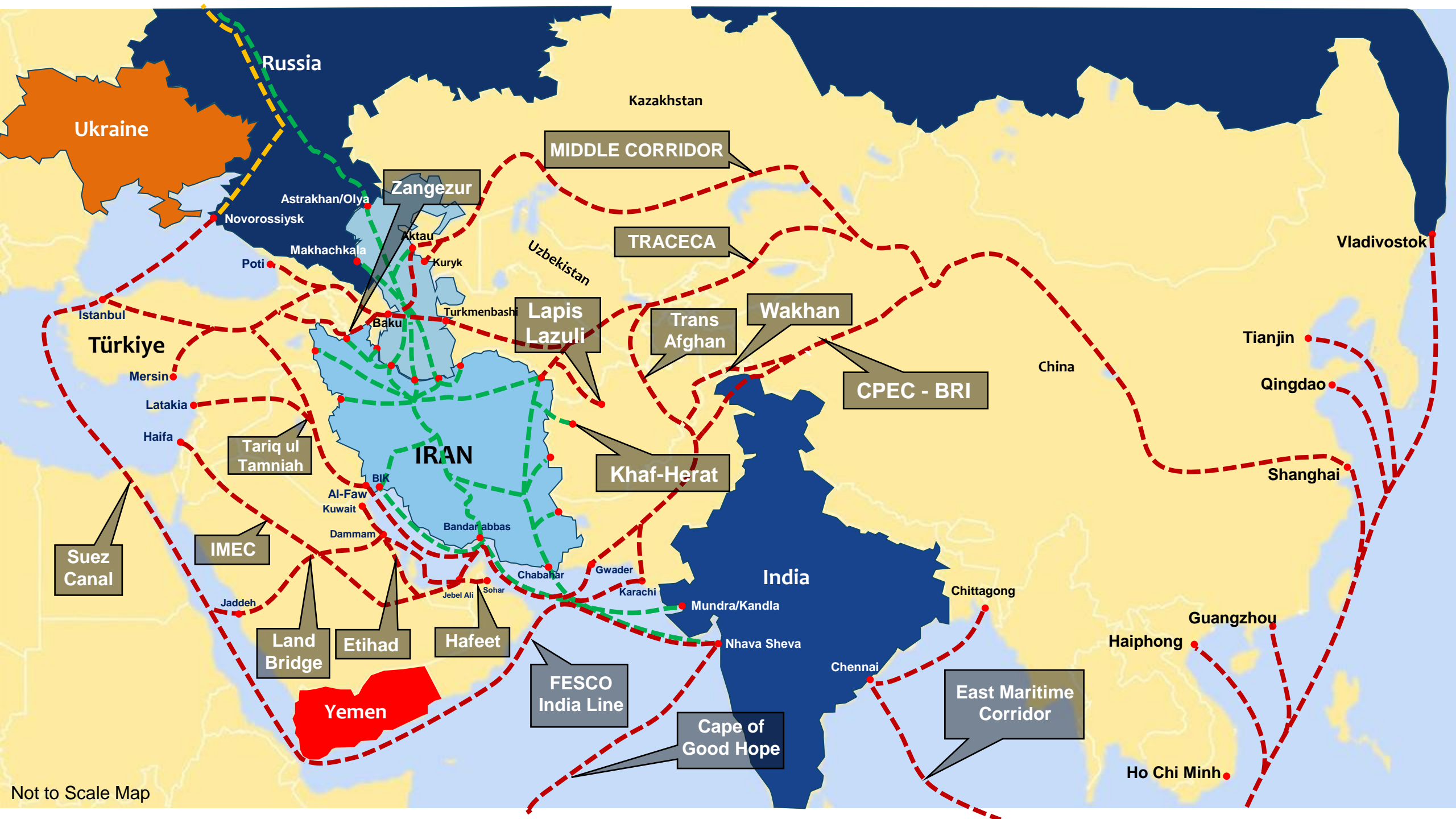
Qatar and Uzbekistan to develop Trans-Afghan Railway

(December 2023)



Uzbekistan’s Ministry of Transport has that Pakistan has announced officially joined the memorandum of understanding on establishing international transport corridor “Belarus–Russia–Kazakhstan–Uzbekistan–Afghanistan–Pakistan–Indian Ocean.” (September 2024)





Not to Scale Map

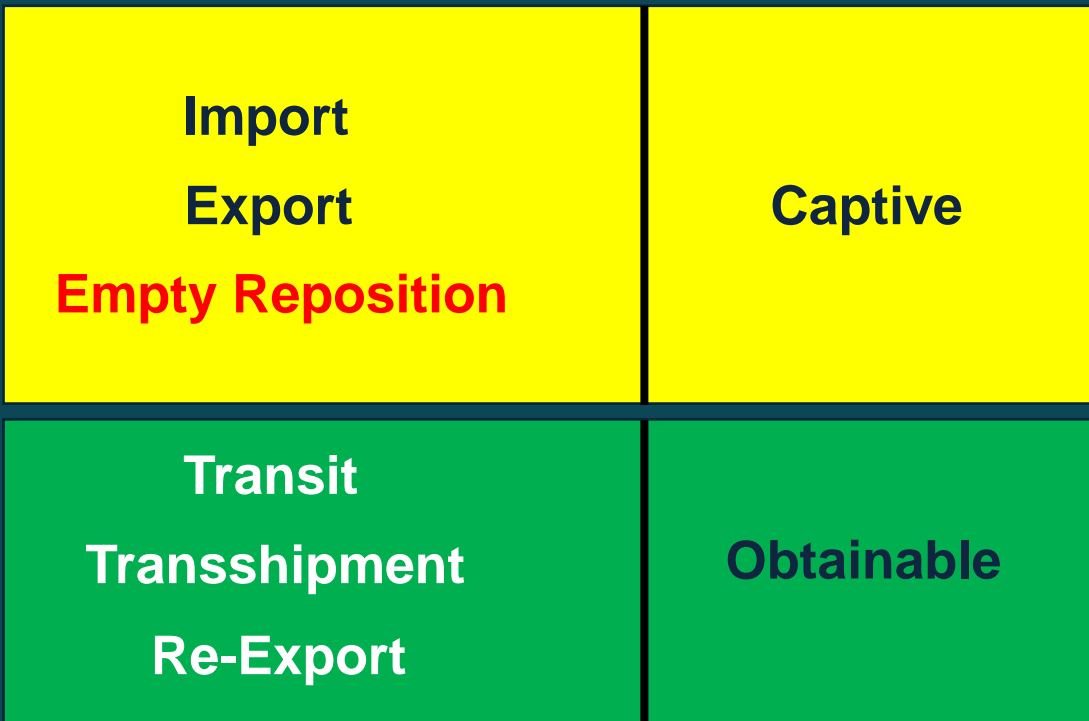
Utilization Rate (Throughput/Capacity)

Port Throughput (TEU) 2023 Annual Capacity (TEU) Utilization

Jebel Ali	14.50 MIn	19.3 MIn ^{+3.1 MIn}	75%
Khalifa	4.91 MIn	7.8 MIn ^{+1.8 MIn}	63%
Dammam	2.30 MIn	7.5 MIn	30%
Bandar abbas	2.13 MIn	6.0 MIn^{+2 MIn}	35%
Hamad	1.30 MIn	2.0 MIn ^{+5 MIn}	65%
Umm Qasr	1.50 MIn	3.0 MIn ^{+Al Faw (+3.5)}	50%
Sohar	0.82 MIn	1.5 MIn ^{+1.5 MIn}	54%
BIK	0.073 MIn	0.65 MIn	11%
Bushehr	0.057 MIn	0.40 MIn	14%
Chabahar	0.050 MIn	0.32 MIn	15%



Captive Market / Obtainable Market



- Requirements**
- Infra-structure
 - Super-structure
 - Equipment
 - Software / EDI
 - Human Assets
- Connectivity**
- Shipping(LSCI), Road, Rail, Borders
- Timelines**
- Track and Trace
 - Formalities
 - Safety and Security
 - Competitive Freight and Tariff
 - International Ties
 - Attitude/Vision



PORTS & TERMINALS

DP WORLD HAS DEVELOPED A STATE-OF-THE-ART NETWORK OF MARINE INFRASTRUCTURE IN THE UAE



Logistics Performance Index (LPI)

Economy	LPI		Customs		Infrastructure		International shipments		Logistics competence and equality		Timeliness		Tracking and tracing	
	Grouped rank	Score	Lower bound	Upper bound	Grouped rank	Score	Grouped rank	Score	Grouped rank	Score	Grouped rank	Score	Grouped rank	Score
United Arab Emirates	7	4.0	3.9	4.1	3.7	4.1	9	3.6	4	4.0	11	4.2	4	4.1
Oman	34	3.5	3.1	3.9	3.1	4.3	3.8	19	3.1	47	3.9	14	3.5	46
India	38	3.4	3.3	3.5	3.0	4.7	3.2	47	3.5	22	3.5	38	3.6	35
Saudi Arabia	38	3.4	3.2	3.6	3.0	4.7	3.6	30	3.3	38	3.3	46	3.6	35
Qatar	43	3.3	3.1	3.5	3.0	4.7	3.2	47	3.4	26	3.2	53	3.1	76
UAE	115	2.4	2.2	2.6	2.1	2.9	2.2	119	2.5	102	2.2	106	3.0	10
Bahrain	88	2.3	1.8	2.8	2.0	1.9	2.3	109	2.4	111	2.4	110	2.4	129
Fiji	133	2.3	2.0	2.6	2.3	1.0	2.2	118	2.3	121	2.3	119	2.3	133
Gambia, The	123	2.3	2.0	2.6	1.8	1.9	2.3	108	2.6	91	2.3	119	2.6	116
Iran, Islamic Rep.	123	2.3	2.1	2.5	2.2	1.0	2.4	80	2.4	111	2.1	103	2.7	109
Kyrgyz Republic	123	2.3	2.1	2.5	2.2	1.0	2.4	89	2.4	111	2.2	106	2.4	129
Madagascar	123	2.3	2.0	2.6	1.9	1.9	1.8	130	2.9	68	2.2	126	2.6	116
Mauritania	123	2.3	1.9	2.7	2.4	1.0	2.0	130	2.2	128	2.5	100	2.8	101
Syrian Arab Republic	123	2.3	2.1	2.5	2.2	1.0	2.2	118	2.3	121	2.2	106	2.5	104
Venezuela, RB	123	2.3	2.0	2.6	2.1	1.0	2.4	89	2.6	135	2.5	103	2.5	124

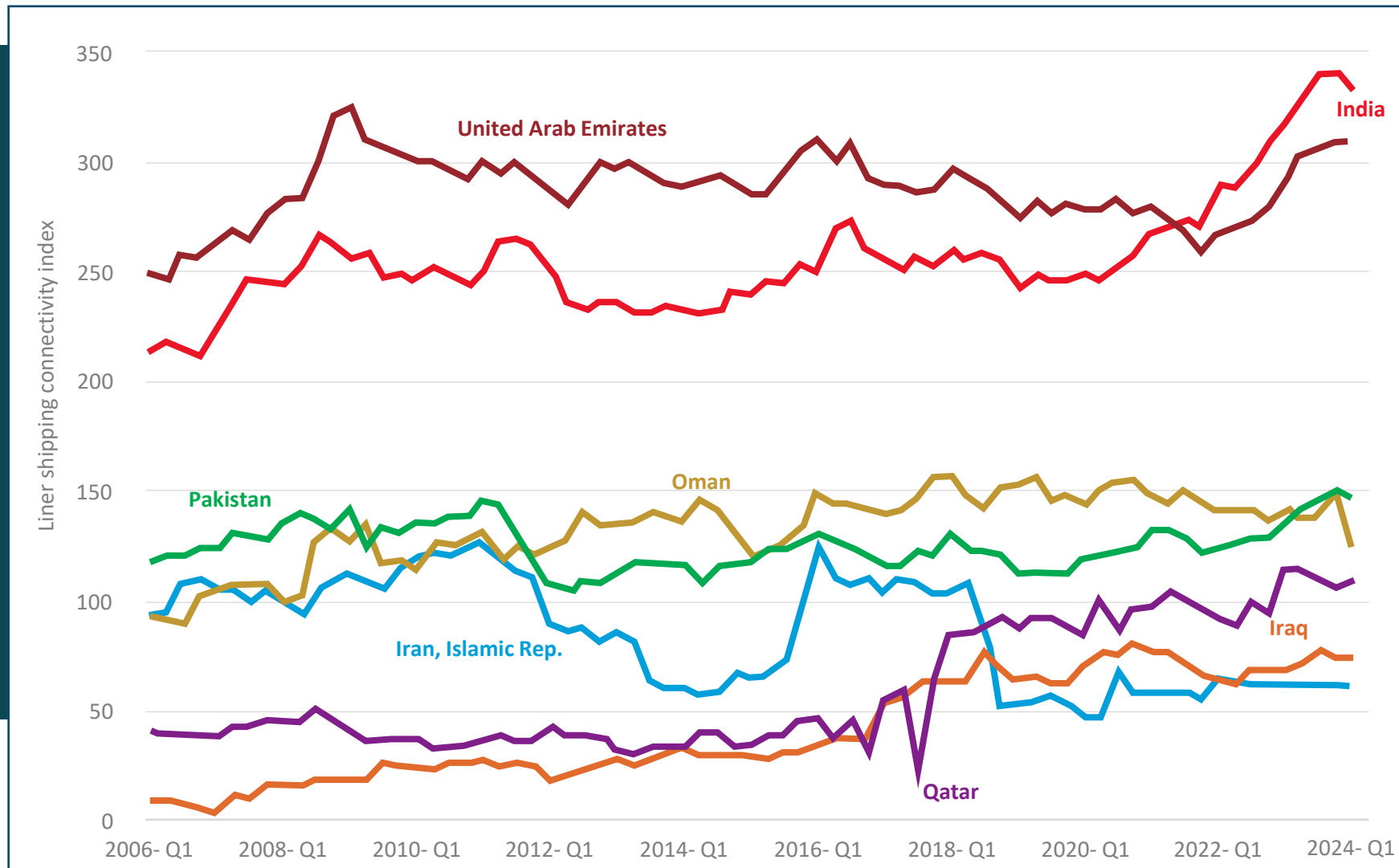
Source: World Bank

150+ Global ports have direct connection to the UAE

180+ Shipping Lines

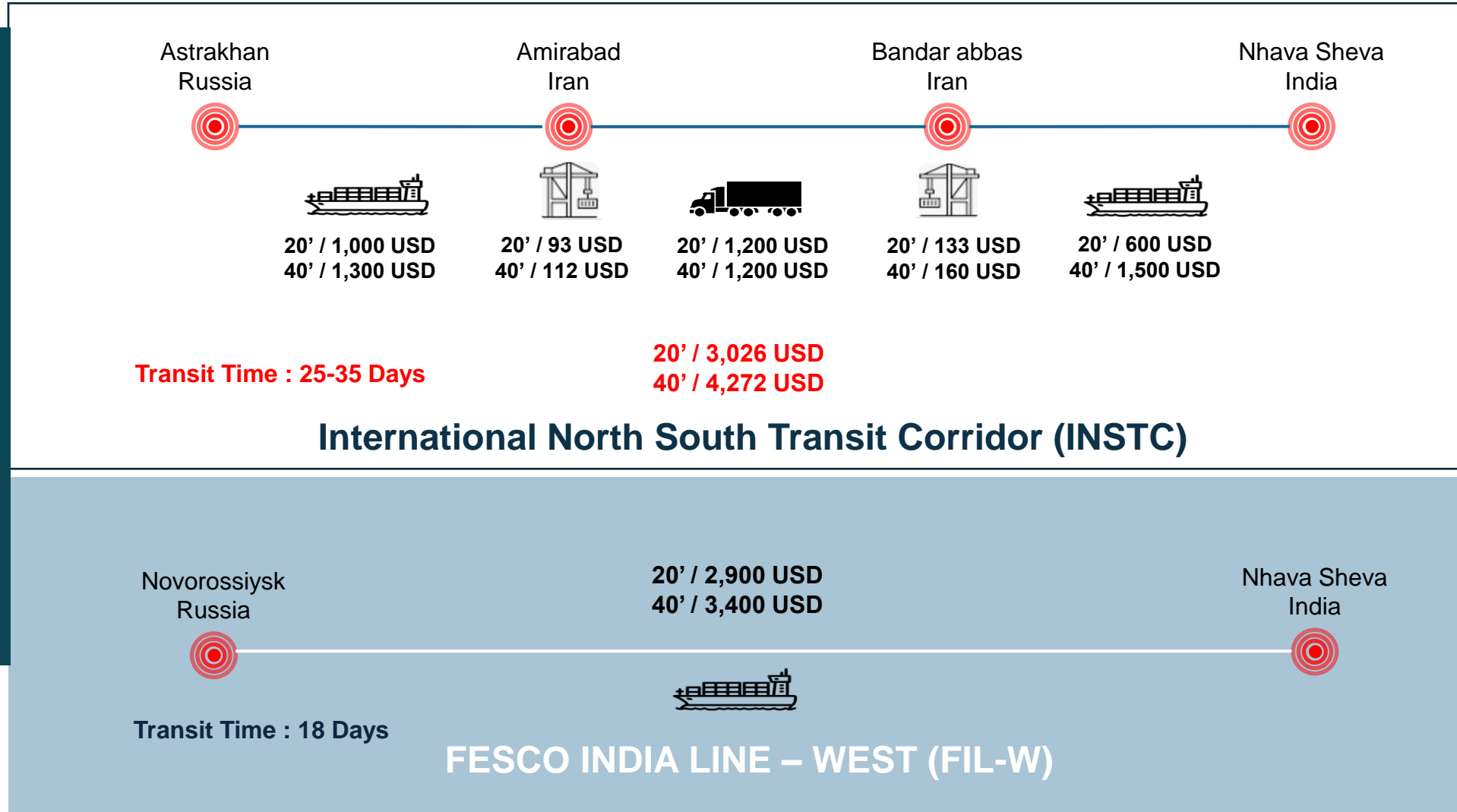
11 Marine & inland terminals

Liner Shipping Connectivity Index (LSCI)



Source: UNCTAD

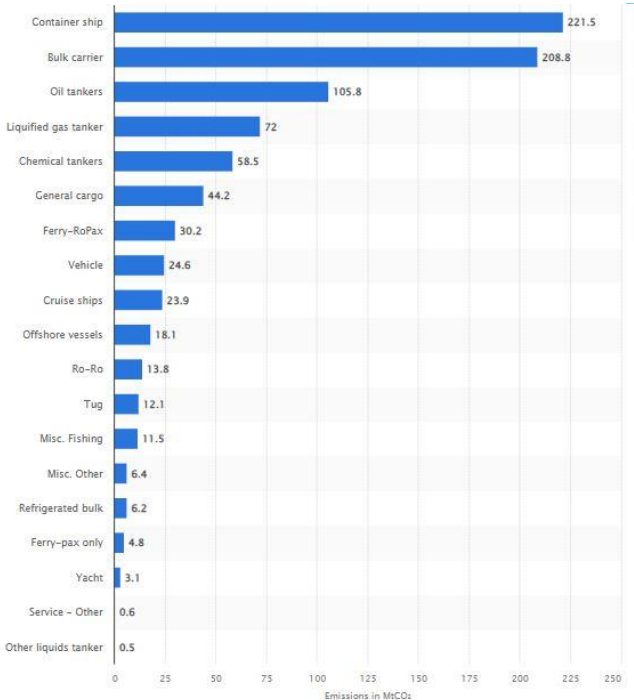
FIL-W Vs. INSTC



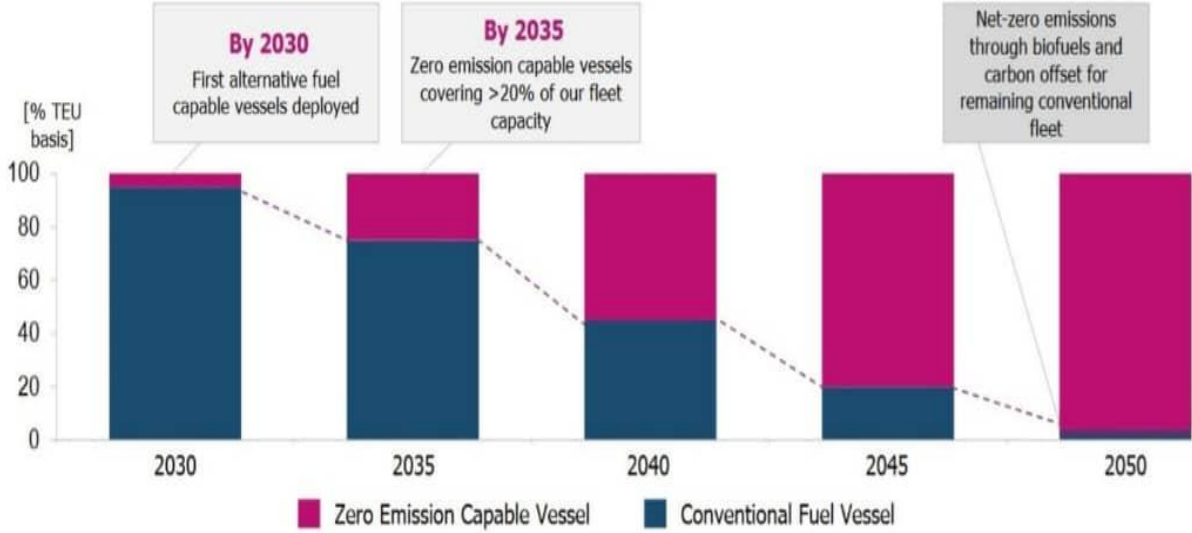
Sea Oriented Development



Zero Emission Shipping



ONE fleet schedule for Zero Emission Capable Vessels



COP28UAE

MAERSK **DP WORLD**

ZEPA
Zero Emission Port Alliance



Zero Emission Shipping



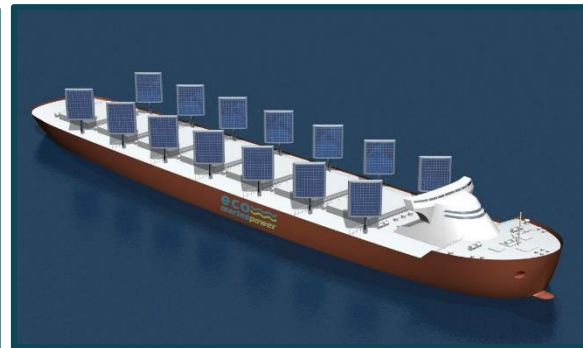
The first All-electric 700 TEU container ship, 119.8 meters LOA, beam of 23.6 meters and a designed draft of 5.5 meters. (26th July 2023)



The first green methanol-fueled bunkered in Singapore to move to Copenhagen/Denmark (27th July 2023)



Wind powered for Zero Emission Shipping



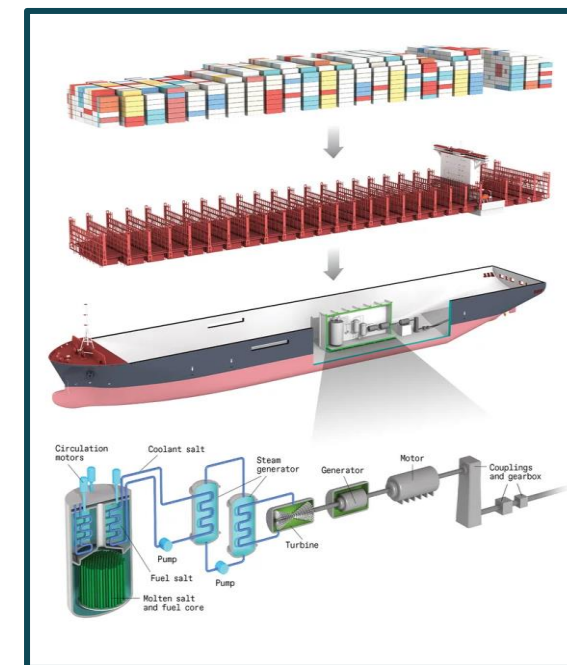
Solar Powered for Zero Emission Shipping



Hydrogen Powered for Zero Emission Shipping



80m long with a beam of 14.8m and a depth of 12m
120 TEU Capacity - **Zero Crew.**



Potential nuclear-powered container shipping in Europe. (August 2024)

Climate Change – Caspian Sea Water Level Crisis



Supply Chain

Talk



December 2024
Tabriz-Iran