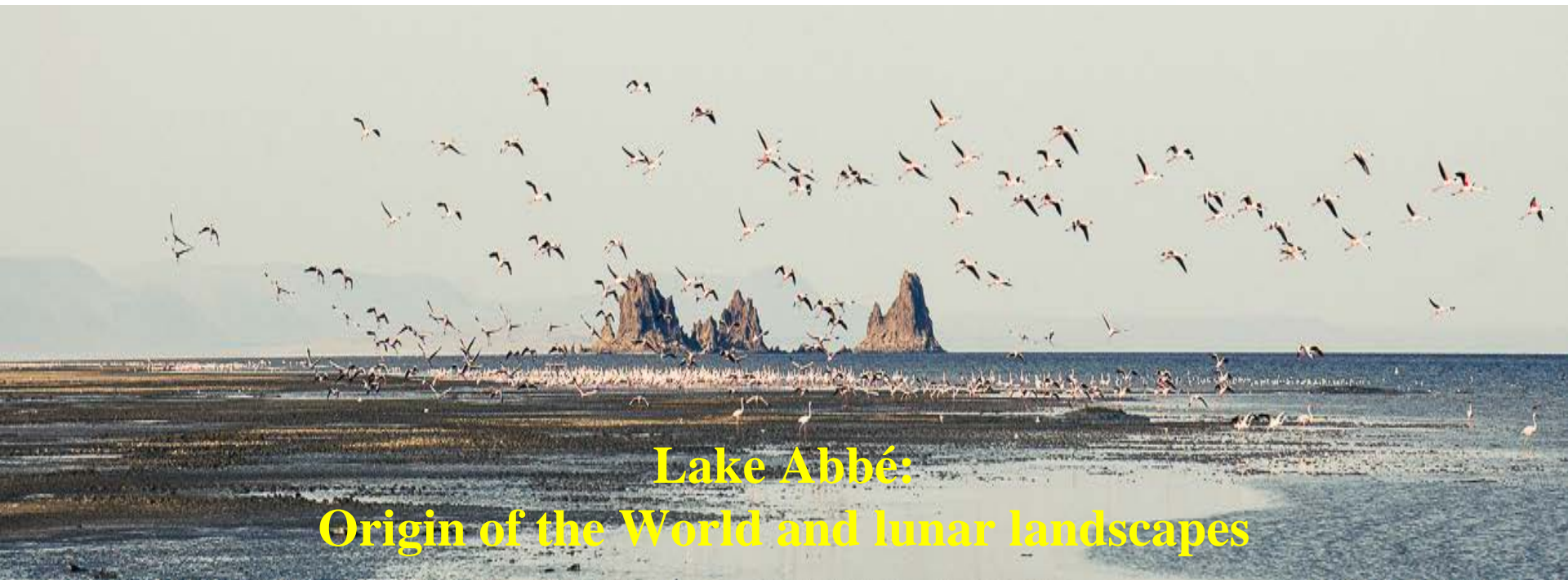




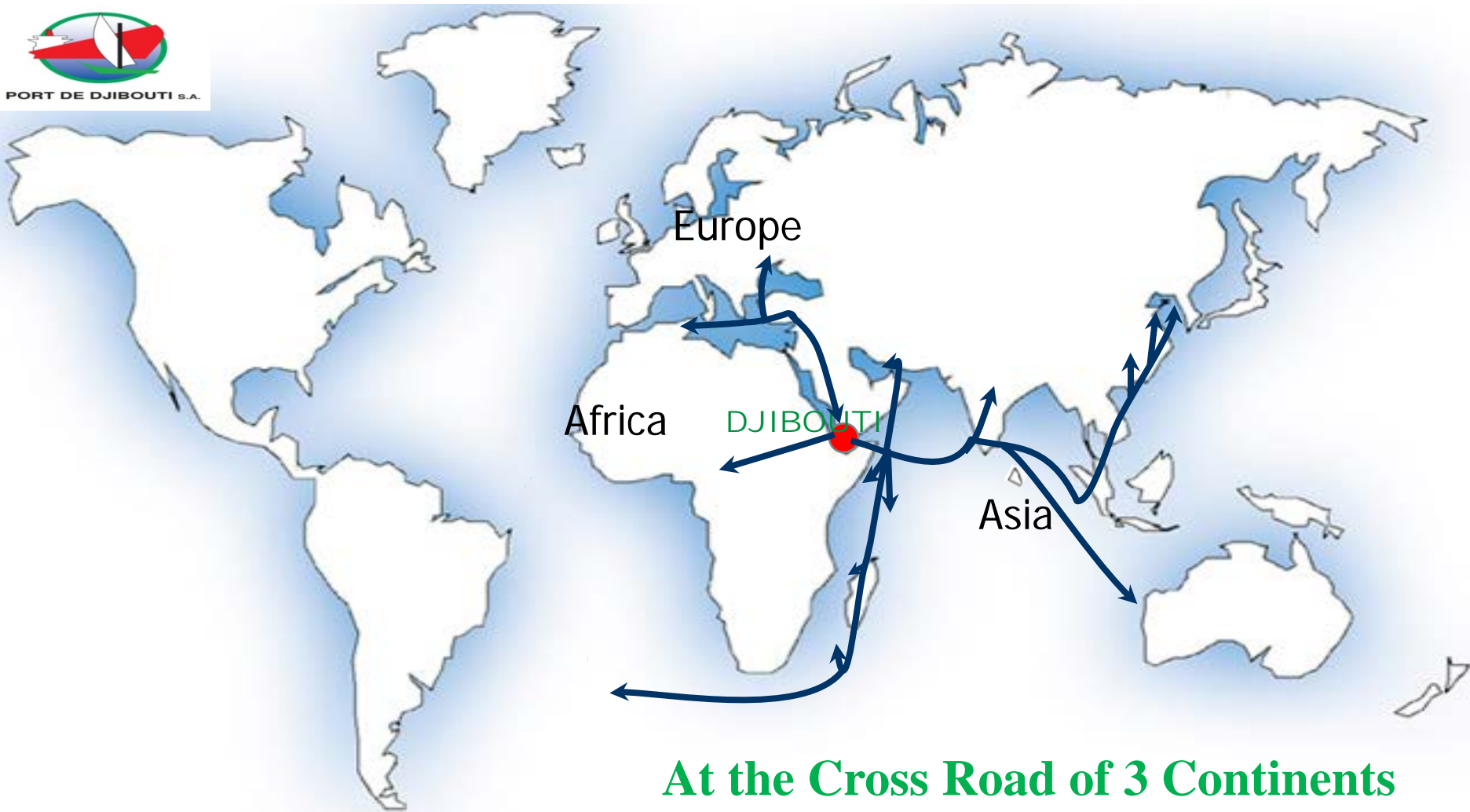
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# Why Djibouti and Nowhere Else





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**At the Cross Road of 3 Continents**

**Djibouti Ports: Port hinterland connectivity and multimodal logistics in Africa  
and the role of Djibouti ports in the gate access into East Africa**

**Mr. Djama Ibrahim Darar**

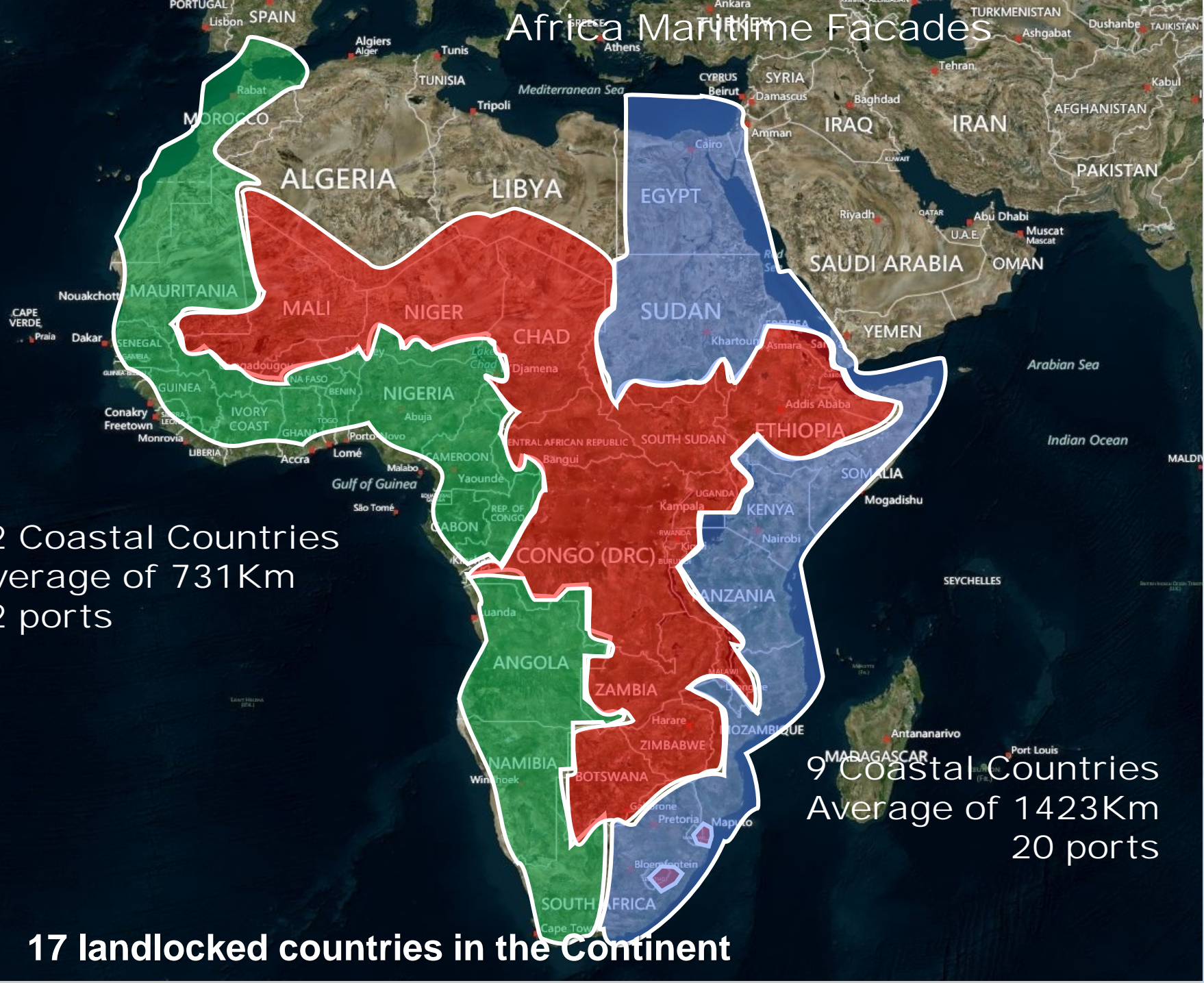
***Commercial Director Port of Djibouti. SA***

# Africa Maritime Facades

22 Coastal Countries  
Average of 731Km  
42 ports

9 Coastal Countries  
Average of 1423Km  
20 ports

17 landlocked countries in the Continent





## Current situation in the continent:

The Hinterland traffic is most dominated by trucks which cause most of the congestion in and around port areas and also generates external costs.

- Even with strategic plans for a modal shift to hinterland traffic towards rail and water, most of ports in the continent aren't connected to a well developed system of inland waterways or railway lines.
- from 2006 to 2013 ,for developed economies, the world sea- trade was 34 percent. Africa's share was only 8.3% .
- The continent handles less than 1% of world container traffic.
- World bank estimated in 2015 that African ports have an infrastructure deficit of more than 60 billion dollars.
- The vast majority of countries are landlocked with a huge potential markets (ie, Congo, Zambia, Zimbabwe)
- Absence or Disruptions to intermodal rail networks that serves ports



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# AFRICAN HINTERLAND PORTS CONNECTIVITY

The importance of hinterland connectivity is one of the most critical issues in port competitiveness and development in most port around the world.

While upgrading facilities and equipment, improving ports operations in order to reduce the ship turnarounds times, the smoothness of port hinterland connections has not followed in the majority of ports in the world

Inadequate port/terminal/road/rail infrastructure has been a problem in many countries for many years, especially Africans. These countries failed to address the problem with the necessary investment.

Even in global economic slowdown where the growth of trade volume has not drop off, ports are facing severe bottlenecks.



## KEY CHALLENGES IN HINTERLAND PORT CONNECTIVITY

- ❖ No Hinterland accessibility ,No efficient port without efficient road and rail network to support it. African rails lines, built by colonial governments, are today outmode and inefficient.
- ❖ The emergence of maritime hubs and the growth of large and ultra large ship vessel cause major congestion in ports and therefore slow the hinterland port connectivity.
- ❖ It's estimated that nearly one in every three African country is landlocked which represent about 26% of the continent's landmass and approximately 25% of the population. Getting access to these markets would then require not only coastal ports developments but also significant investments in inland logistics (hinterland connectivity) as well.



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# The role of Djibouti ports in the gate access into East Africa with hinterland connectivity

## 1. Overview

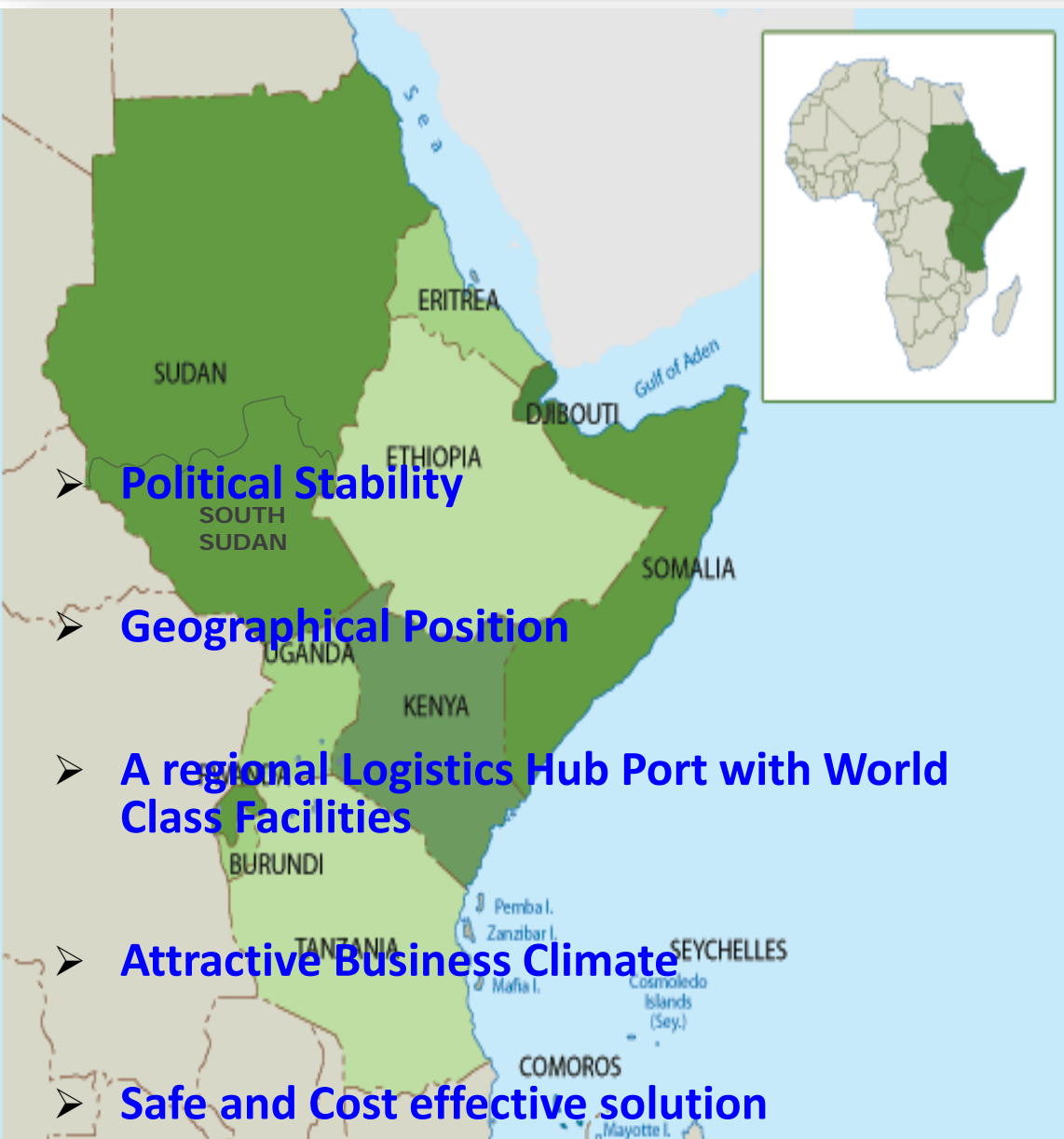
## 2. Current infrastructures and logistics Platform to serve the hinterland

**3. New facilities projects :** The key to Djibouti ports's' success is to integrate port developments with effective hinterland connectivity



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# Republic of Djibouti - Overview



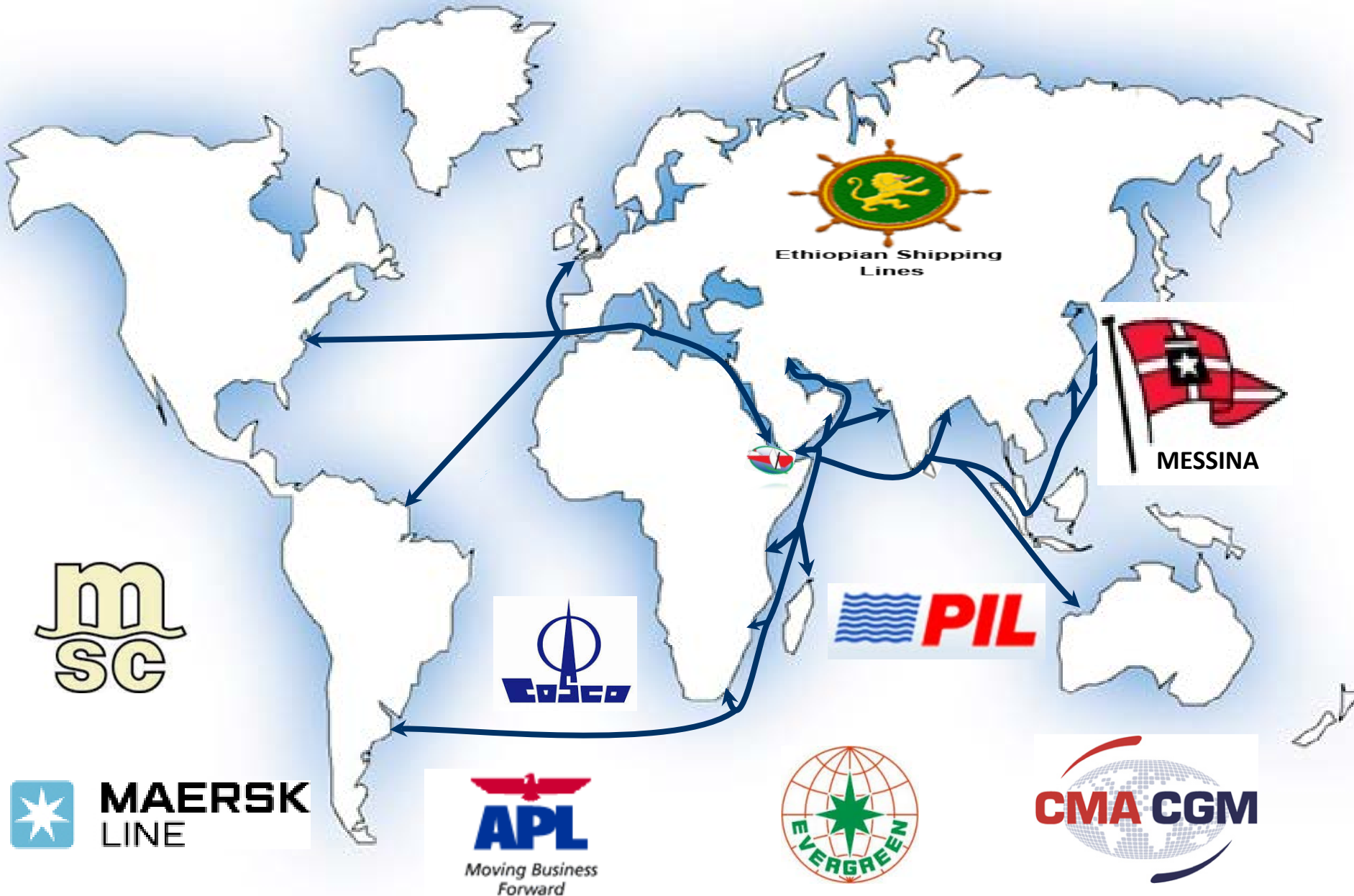
- **At the crossroad of busiest maritime routes**
- **Maritime Gateway of Great Ethiopia & COMESA**
- **Languages**
- **French & Arabic are official languages**
- **English & Amharic are spoken by Traders**
- **Afar & Somali are locally spoken languages**
- **Military bases (France, USA, Japan, espagnol, chine, germany, italia...etc), anti-piracy and anti-terrorism regional center**
- **Economy based on service sector (82% of GDP)**
- **Port and related activities are motor economic growth**



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# An excellent connection to the world

## Overview





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# Eastern African Trade Corridors





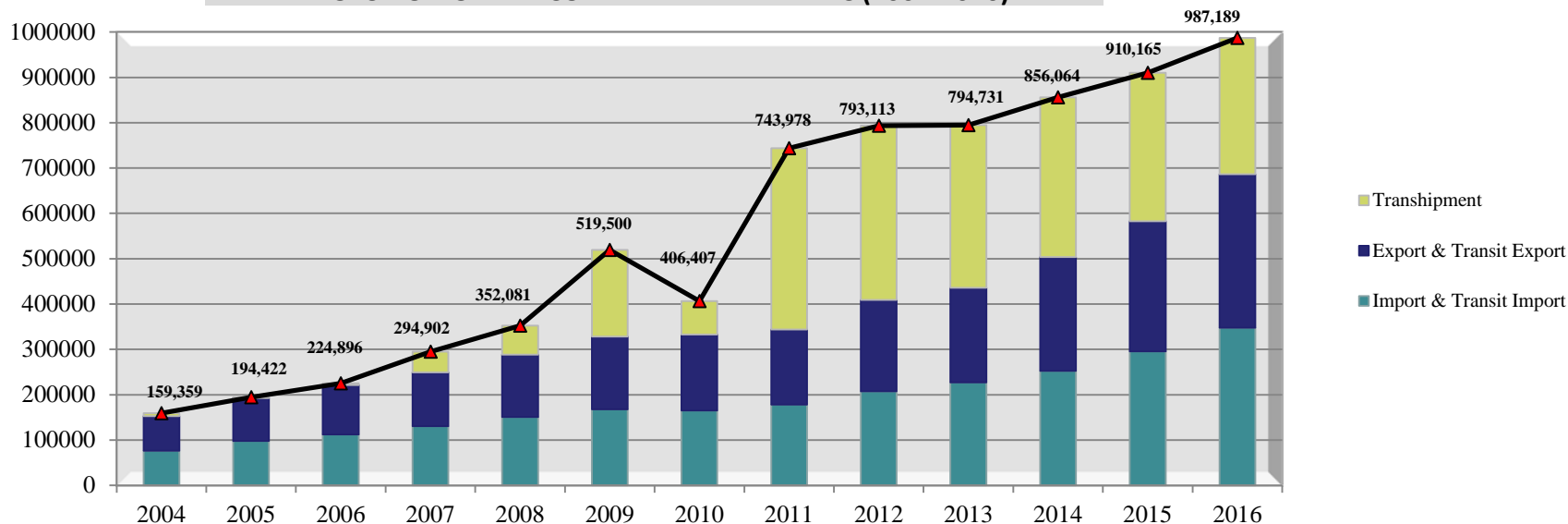
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# Containerized traffic

## Overview

| STATUTS                 |                |                |                |                |                |                | PDSA & DCT Throughput - TEU |                |                |                |                |                |                |
|-------------------------|----------------|----------------|----------------|----------------|----------------|----------------|-----------------------------|----------------|----------------|----------------|----------------|----------------|----------------|
|                         | 2004           | 2005           | 2006           | 2007           | 2008           | 2009           | 2010                        | 2011           | 2012           | 2013           | 2014           | 2015           | 2016           |
| Import & Transit Import | 76 158         | 97 672         | 112 193        | 130 440        | 150 759        | 167 954        | 164 968                     | 157 167        | 181 788        | 199 411        | 216 456        | 259 599        | 347 619        |
| Export & Transit Export | 76 664         | 95 055         | 109 283        | 118 865        | 137 825        | 160 083        | 167 992                     | 147 260        | 178 849        | 186 179        | 217 162        | 253 720        | 338 969        |
| Transshipment           | 6 537          | 1 695          | 3 420          | 45 597         | 63 497         | 191 463        | 73 447                      | 399 190        | 382 636        | 358 203        | 351 736        | 323 487        | 300 601        |
| <b>TOTAL TEUs</b>       | <b>159 359</b> | <b>194 422</b> | <b>224 896</b> | <b>294 902</b> | <b>352 081</b> | <b>519 500</b> | <b>406 407</b>              | <b>743 978</b> | <b>791 463</b> | <b>794 731</b> | <b>856 064</b> | <b>910 165</b> | <b>987 189</b> |

EVOLUTION OF THE CONTAINERIZED TRAFFIC (2004-2016)



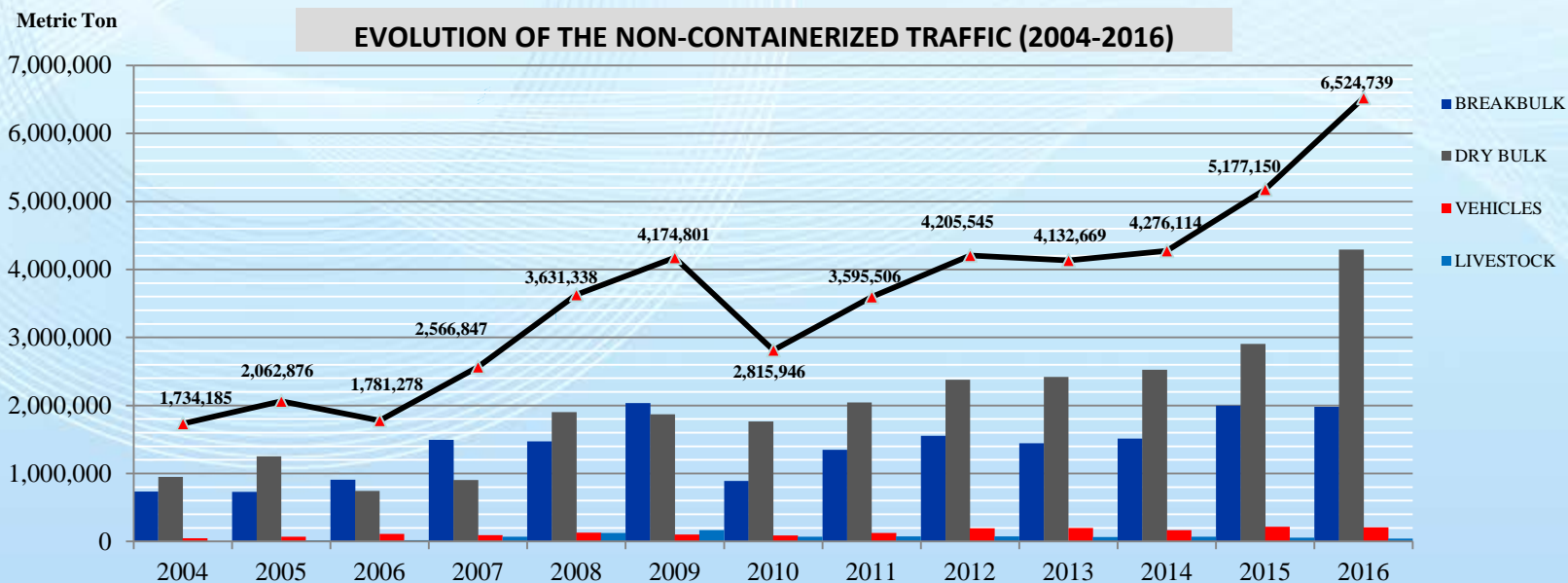


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# Non-containerized traffic

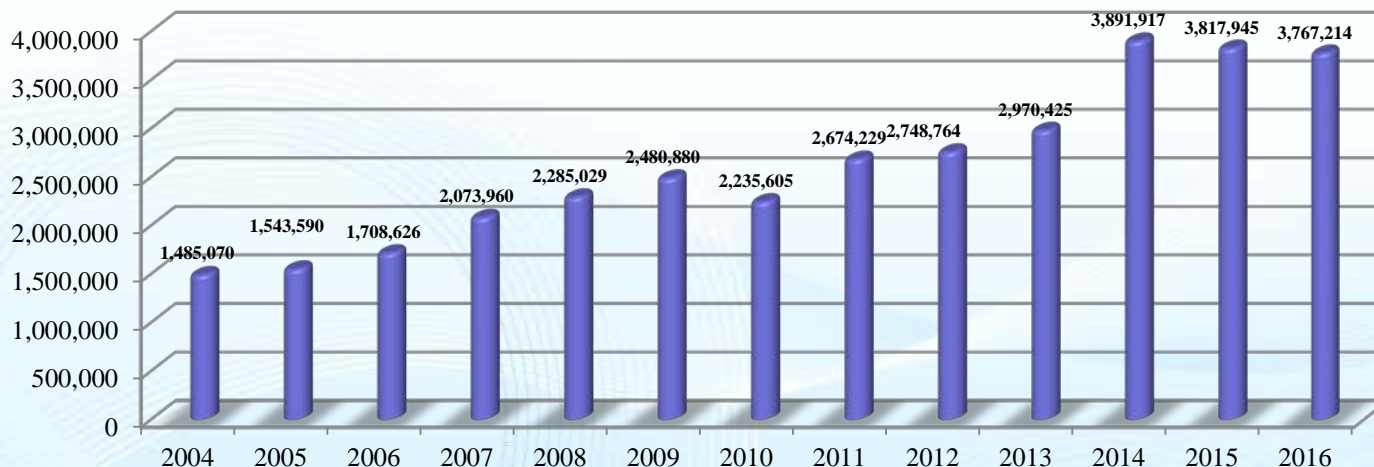
# Overview

| PERIOD    | 2004       | 2005       | 2006       | 2007       | 2008       | 2009       | 2010       | 2011       | 2012       | 2013       | 2014       | 2015       | 2016       |
|-----------|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|
| STATUS    | Metric Ton | Metric Ton | Metric Ton | Metric Ton | Metric Ton | Metric Ton | Metric Ton | Metric Ton | Metric Ton | Metric Ton | Metric ton | Metric ton | Metric ton |
| BREAKBULK | 736 978    | 728 252    | 907 681    | 1 497 448  | 1 472 620  | 1 357 670  | 901 455    | 2 033 383  | 1 556 830  | 1 446 041  | 1 512 307  | 2 000 834  | 1 980 299  |
| DRY BULK  | 949 973    | 1 251 547  | 743 197    | 904 810    | 1 901 913  | 2 044 780  | 1 754 574  | 1 871 215  | 2 378 462  | 2 421 703  | 2 527 487  | 2 904 466  | 4 294 530  |
| VEHICLES  | 45 847     | 68 668     | 111 047    | 93 093     | 129 888    | 124 852    | 88 999     | 102 689    | 194 134    | 199 451    | 164 783    | 215 833    | 208 269    |
| LIVESTOCK | 1 387      | 14 409     | 19 353     | 71 496     | 126 917    | 77 348     | 70 918     | 167 514    | 76 119     | 65 474     | 71 848     | 56 016     | 41 641     |
| TOTAL     | 1 734 185  | 2 062 876  | 1 781 278  | 2 566 847  | 3 631 338  | 3 604 650  | 2 815 946  | 4 174 801  | 4 205 545  | 4 132 669  | 4 276 424  | 5 177 150  | 6 524 739  |

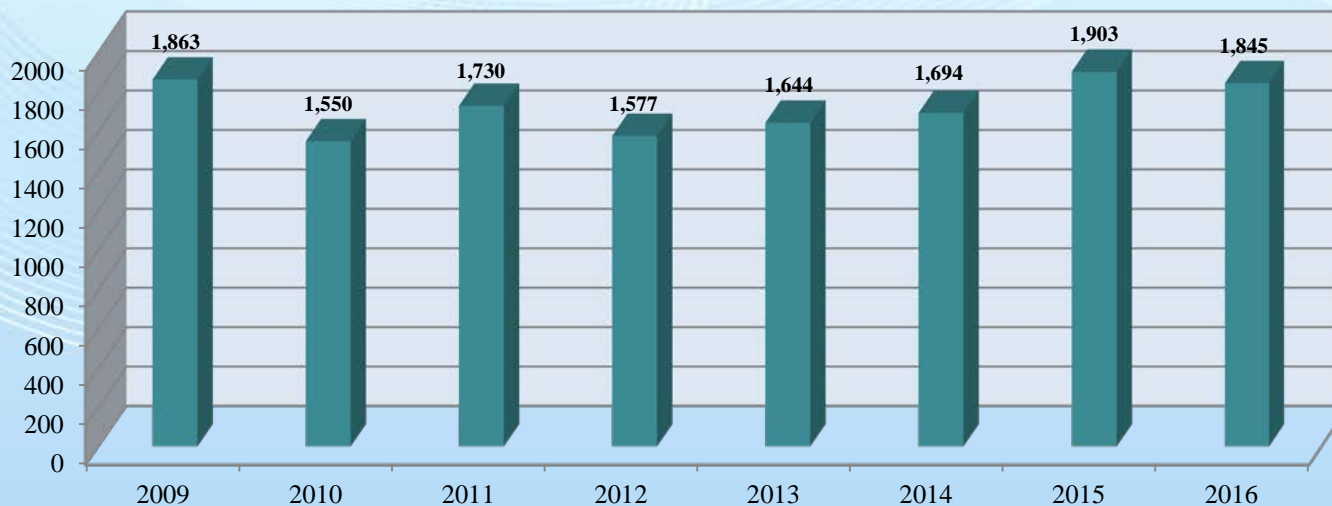




**EVOLUTION OF THE LIQUID BULK TRAFFIC (2004-2016 / MT)**



**VESSEL CALL PER YEAR (2009-2016)**





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# Djibouti Ports Facilities

**Current infrastructures**





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# Free Zone

## Current infrastructures

- **165 companies registered and operating in Djibouti Free Zone**  
**37 Nationalities , 64% from overseas**
- **Office spaces, warehouses, Light Industrial Units, Hangars and serviced land**
- **02 June 2002, the establishment of the Authority of Djibouti Free Zone;**
- **in 1999, creation of the dry port of Djibouti**



**40 hectares of space (17 ha for Free Zone & 23 ha for the Dry Port).**



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# Doraleh Container Terminal (DCT)

## Current infrastructures

### Phase 1 (Construction started on November 11th 2006)

- 1050 m quay length
- 18 m draught
- 6 Super Post Panamax quay cranes
- 16 RTG
- 1.2 million TEU capacity
- 480 TEU Reefer points

### Phase 2 (in process)

- 950m length quay extension (to reach a total of **2000 m**)
- **3 million** TEU capacity

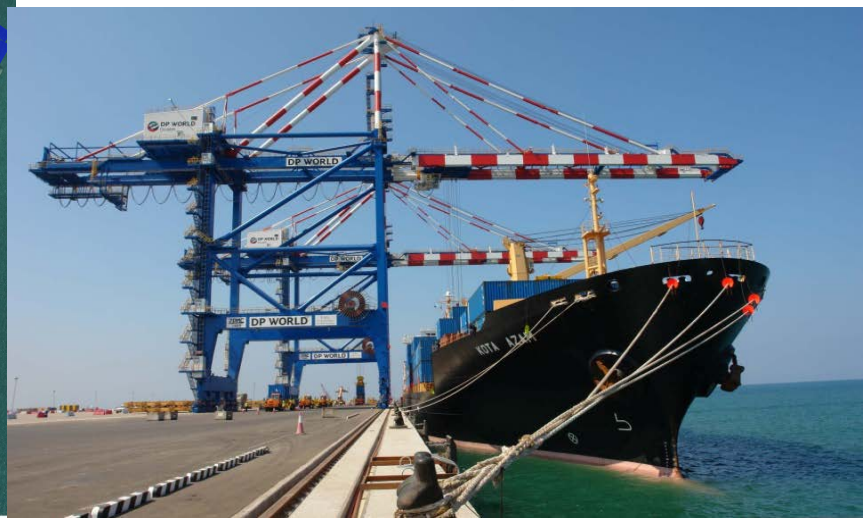
- Certified ISO 28000 since 2009 and ISO 9001 from 2011;
- World Class Productivity: 34 m/hr/crane average;
- Managed by DP World (Top 3 terminal Operator);

- New and Modern Facilities;
- 800 employees, 98% local;
- 400 millions US\$ investment;
- One of the biggest Container Terminal on the continent

### 03 November 2008, Arrival of new quay cranes and RTG



### 14 December 2008, first vessel





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# Doraleh Oil Terminal (HDTL)

**Current infrastructures**

## Phase 1



## Phase 2





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# Overview of New facilities projects





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# Total Investments

The coming 3 years, we are going to invest over 14.32 Billion USD on the development of ports and maritime related business activities.

*+84% of this amount are already secure.*



## RECOMMENDATIONS

- ✓ Port hinterland connectivity must become a part of port strategy, planning and management.
- ✓ Its imperative for the continent to get more intermodal freight transport and greater hinterland connectivity and should containing developed inland logistics zones with appropriate warehouses and other services.
- ✓ The port productivity is based on these main factors: terminal infrastructure, and processes and governance mechanisms.



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# Thank you

[www.portdedjibouti.com](http://www.portdedjibouti.com)



## The smiling face of Africa