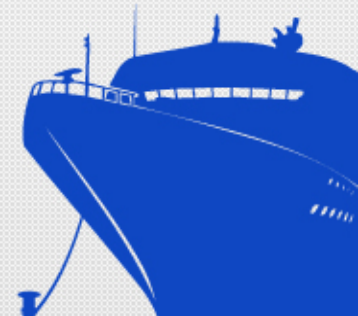


National Port Strategy on the horizon 2030



February 2015



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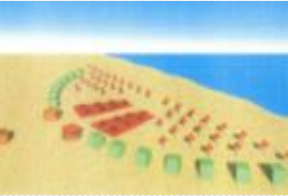
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I- National Port Strategy on the horizon 2030

Context and issues Strengths and Weaknesses



Strengths



New port organization implemented since 2006 (State/Agencies/Private operators)

3500 km coastline and several sites appropriate to host new ports

Geostrategic position of Morocco located at the intersection of main maritime routes

Success story of Tanger-Med Port

Weaknesses



Importance of port infrastructure
Investment required

Ports surrounded by urban areas

Increase of the vessel sizes

I- National Port Strategy on the horizon 2030

Context and issues Opportunities and Threats



Opportunities



Evolution of world traffic (trans-shipping, cruise, hydrocarbons...)

Initiation of sectorial strategies in Morocco

Political willpower to develop the port sector in order to support the competitiveness of the national economy and boost the local development

Threats



Delay in anticipating the needs of national and global traffic

Less fluidity to access most of the major ports, surrounded by urban areas

Hard regional ports competition

I- National Port Strategy on the horizon 2030 :

Context and issues International opportunities

Containers



- the number of containers handled at ports in the world continues to grow,
- 20% of this traffic crosses the Mediterranean sea.

Hydrocarbons

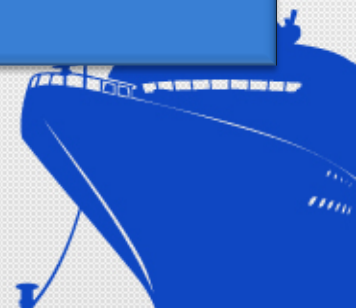


20% to 25% of world oil traffic crosses the Mediterranean sea, about 360 million tons / year.

Cruise



Potential to capture 1.2 million passengers by the year 2030 (currently 450 000)



I- National Port Strategy on the horizon 2030 :

Objectives and Vision

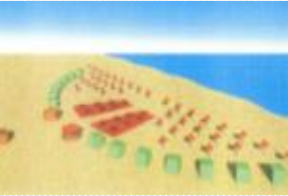
Efficient ports, catalysts of competitiveness of the national economy, drivers of regional territorial development and key players in positioning Morocco as a logistics platform in the Mediterranean sea



1- To support the competitiveness of the economy.

2- To capture a market share of international seaborne trade and cruising traffic, and integrate the port system within the regional transportation network

3- To contribute to the regional balance of the kingdom and promote social and human development.

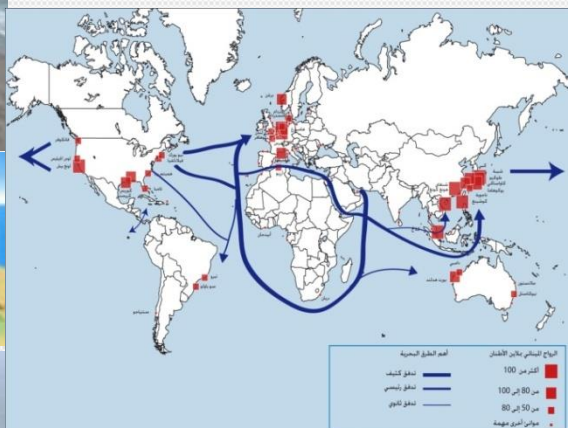


I- National Port Strategy on the horizon 2030

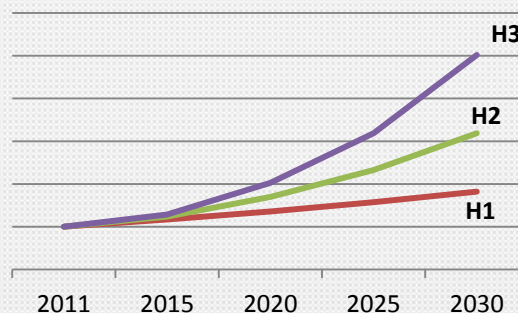
Methodology

Prospective and participative approach oriented towards the port's client and based on three kinds of traffic:

International Opportunities



Economic Growth Forecasts



Sectorial strategies



Significant increase in traffic and port activities in the medium and long term



I- National Port Strategy on the horizon 2030

Methodology

Matching supply and demand of ports

Traffic growth forecast on the horizon 2030

Current port capacity

290 To 370 MT

140 MT

Strengthening and adapting port's supply to the development of maritime transport sector

Balanced distribution of port infrastructure along the Moroccan coast in order to face both the traffic growth and the local development

New approach based on the concept of port poles, in order to increase the value of the comparative advantages of each region (its resources, its towns, its infrastructure ..)



I- National Port Strategy on the horizon 2030

Port poles and their vocations



Northwest pole

transshipment
IRT and ferries
Cruising and yachting

Kenitra-Casablanca pole

Containers - Energy traffic
Cruising and yachting
Conventional
Future opportunities

Souss Tensift pole

Containers
Cruising and yachting
Fishing traffic

Abda Doukkala pole

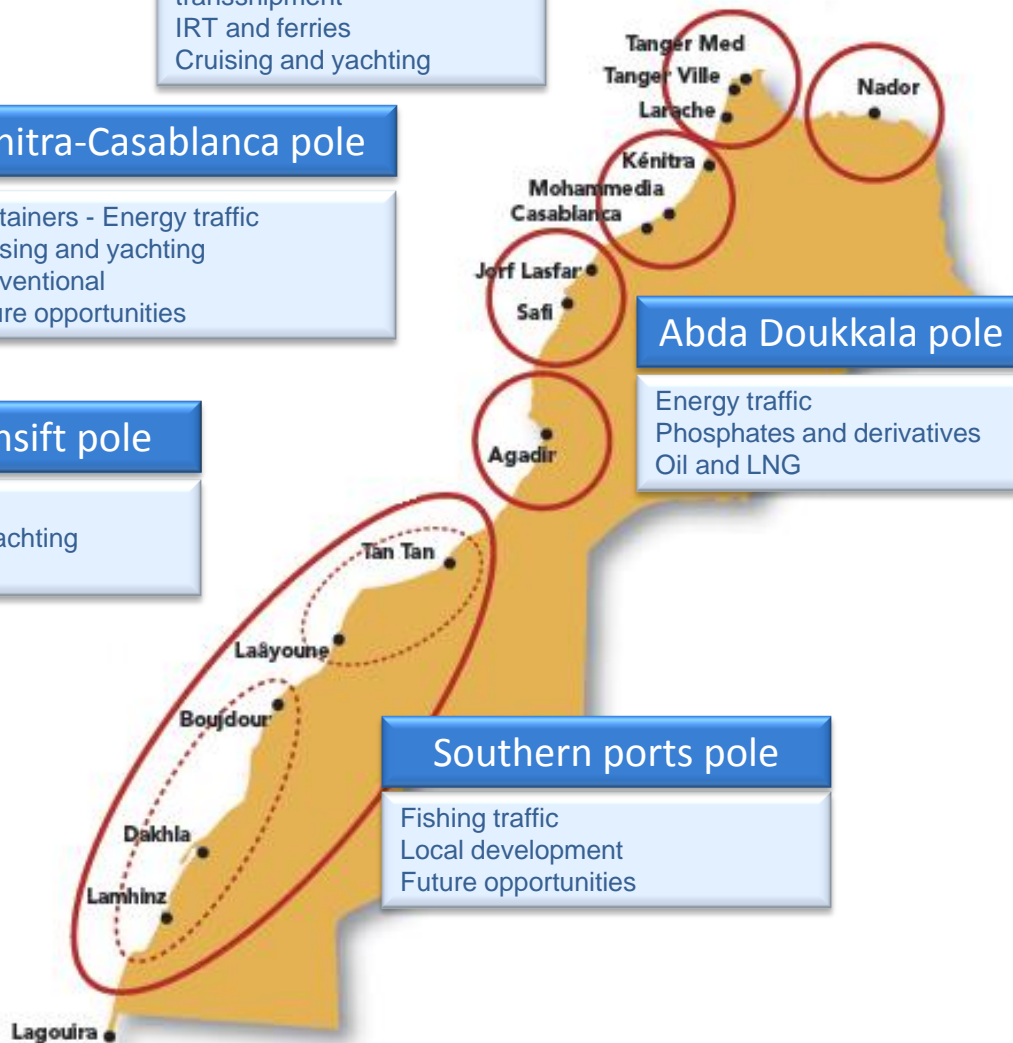
Energy traffic
Phosphates and derivatives
Oil and LNG

Southern ports pole

Fishing traffic
Local development
Future opportunities

Eastern Pole

IRT and ferries (MoS)
Coal - Oil
Cruising and yachting
Containers - Future Opportunities



I- National Port Strategy on the horizon 2030 :

Main pillars of the SPN 2030



Important extensions

- Port of Mohammedia
- Port of Casablanca
- Port of Jorf Lasfar
- Port of Agadir
- Port of Tarfaya

Integration of ports into their urban environments

- Tanger-ville
- Casablanca
- Safi-ville
- Kénitra-ville

Construction of new ports

- Port of Nador West Med
- New Atlantic Port of Kenitra
- New port of Safi
- New Gaz port of Jorf Lasfar
- New Atlantic port of Dakhla

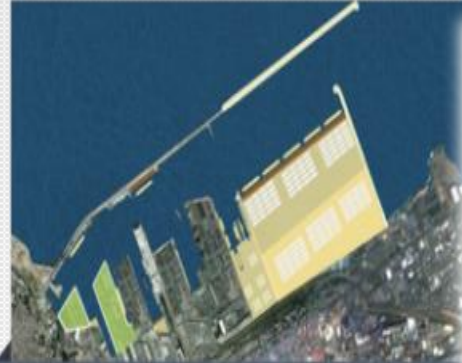
I- National Port Strategy on the horizon 2030

Main pillars of the SPN 2030

Important extensions



Port of Mohammedia



Port of Casablanca



Port of Jorf Lasfar



Port of Agadir



I- National Port Strategy on the horizon 2030

Main pillars of the SPN 2030
Integration of ports into their urban environments



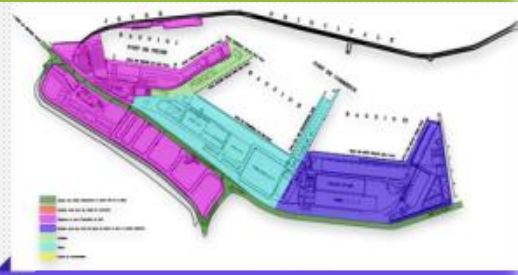
River port of Kenitra



Port of Tanger Ville



Port of Casablanca



Port of Safi Ville



Port of Al Hoceima



I- National Port Strategy on the horizon 2030

Main pillars of the SPN 2030

Construction of new ports



New Atlantic Port of Kenitra



Port of Nador West Med



New gas port of Jorf Lasfar



New port of Safi



New Atlantic Port of Dakhla



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II- NSP 2030 projects financing

The cost of planned port projects, which are included in NSP 2030, for the next 20 years is estimated at :
60 Billion dirhams (6,5 Billion Dollars)

Funding

State funding

The port agencies
contributions

Public Private
Partnership



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III- Eligible projects for a Public-Private-Partnership



General Port



The new Atlantic port of Kenitra

Liquefied Natural Gas Port

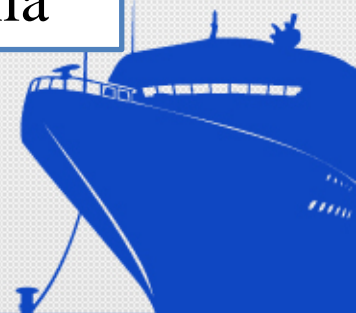


The new port of Jorf Lasfar

Fishing-Industrial port



The new Atlantic port of Dakhla



III- Eligible projects for a Public-Private-Partnership:

Global position map



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IV- the main studies results of the three eligible projects for PPP

The New Atlantic Port of
Kenitra

➤ Objectives:

- Provide a modern and efficient port capacity to serve traffic from or destined for the hinterland including the regions of Gharb, Loukkous, Fez-Meknes and Tangier.
- Create a new port offering that would relieve the port of Casablanca by a gradual transfer of traffic bulk, neo-bulk and conventional.
- Respond to future opportunities that may be materialized including (shipbuilding and repair, automotive ...).



IV- the main studies results of the three eligible projects for PPP

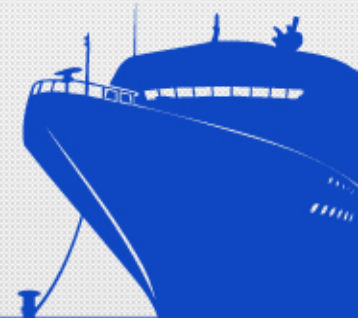
The New Atlantic Port of Kenitra

➤ Site and its advantages:

The area chosen to host the new Atlantic port of Kenitra is situated at Oulad Bel Assal, which is located at 24 Km far from the mouth of Oued Sebou.

The chosen site has the following advantages:

- Proximity to the motorway A1 (Tangier-Casablanca) ;
- Proximity to the railway line, and the future HSL (LGV).
- Bathymetric line -20m to 2 km from the coast;
- Availability of sufficient back ground (2000 ha of land)

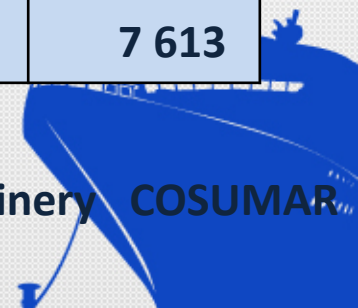


IV- the main studies results of the three eligible projects for PPP

➤ confirmed traffic (T 1000) :

Year		2020	2025	2030
Traffic of hinterland	Cereals	1328	1382	1438
	Citrus fruits	156	156	156
	LPG	550	700	900
	Refined oil	1 254	1 400	1 600
Transferred traffic	Ore and other dry bulk	637	669	703
	General Cargo	957	1 164	1 416
Total (except sugar traffic)		4 882	5 471	6 213
Sugar traffic (*)		1 100	1 243	1 400
Total (including sugar traffic)		5 982	6 714	7 613

(*)Captive traffic in case of the relocation of the refinery COSUMAR Casablanca in the region of Kenitra



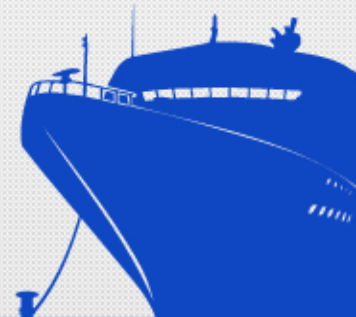
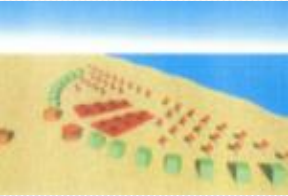
IV- the main studies results of the three eligible projects for PPP

The New Atlantic Port of Kenitra

➤ Opportunity Traffic :

Traffic identified above are not the only potential traffic for the port.

Indeed, the port is designed to be extensible for responding to future economic opportunities such as **automotive, shipbuilding, food processing industry ...**



IV- the main studies results of the three eligible projects for PPP

The New Atlantic Port of Kenitra

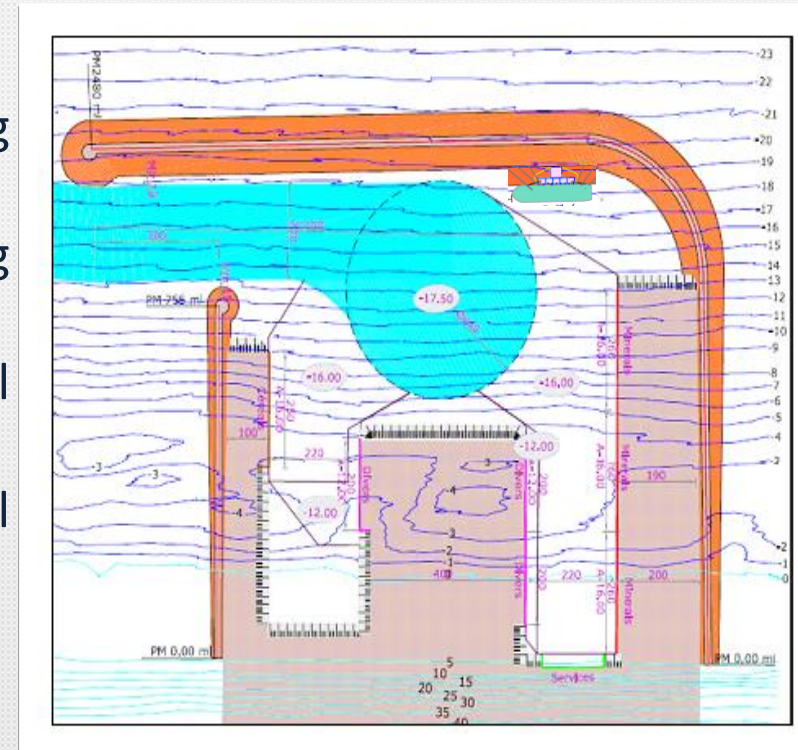
➤ Project infrastructure components:

Protection works :

- A main breakwater with a length of 2660ml, at a depth of -20 m/zh.
- A secondary breakwater with a length of 765 ml.

Terminals and quays :

- 3 quays for ores of 260m long each , and -16m/zh deep.
- 1 quay for cereals : 250ml long and - 16m/zh deep.
- 1 quay for sugar traffic: 250ml long and - 16m/zh deep.
- 3 quays for general cargo 200ml each one and -12m / zh deep.
- 1 oil berth -16.5 m/zh deep.



IV- the main studies results of the three eligible projects for PPP

The New Atlantic Port of
Kenitra

➤ forecast Project cost:

The works cost is estimated at **8 billion** DH all taxes included (864 million \$) :

- **4.5 billion** DH (486 million \$) devoted mainly to protection works (breakwaters...)
- **3.5 billion** DH (378 million \$) dedicated to port terminals (that can be arranged within Public Private Partnerships).



IV- the main studies results of the three eligible projects for PPP

The New Atlantic Port of
Kenitra

➤ planning for achieving studies

Study	Advancement	Deadline	Observations
Summary study	Study achieved	November 2014	
Detailed technical study	Underway since August 1, 2014	December 2015	Finalisation of this study depends on the results of geotechnical studies.
Summary land Study	Underway since August 1, 2014	December 2014	
Geotechnical studies	Contract under approbation	October 2015	Advancement of geotechnical work very closely linked to the state of the sea.
Tender documents for Enterprises		February 2016	Final deliverable of detailed study.



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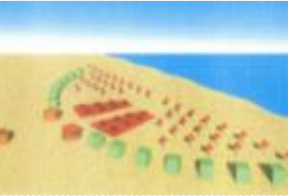


IV- the main studies results of the three eligible projects for PPP

The New Port of Jorf Lasfar

➤ Objectives:

- Serving an LNG traffic (first phase)
- Responding to the needs of a prospective refinery in the area (2nd phase)



IV- the main studies results of the three eligible projects for PPP

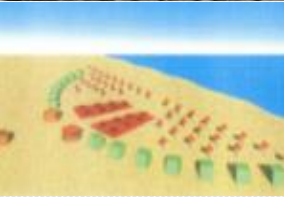
The New Port of Jorf Lasfar

➤ Site and its advantages:

The new port of jorf Lasfar is located between the White Cape (to the north) and the current port of Jorf Lasfar (to the south).

The chosen site has the following advantages:

- Proximity to:
 - The industrial area of Jorf Lasfar;
 - The existing transport network;
- Availability of sufficient back ground



IV- the main studies results of the three eligible projects for PPP

The New Port of Jorf
Lasfar

➤ Forecast traffic /year:

➤ LNG TRAFFIC

Year	Traffic need
2016	3.8 BCM*
2020	5.7 BCM
2025	6.2 BCM
2030	7.8 BCM

➤ HYDROCARBONS TRAFFIC

- Import : 10 million T of crude oil;
- Export : 7.5 million T of refined oil.

* BCM : Billion Cubic Meters

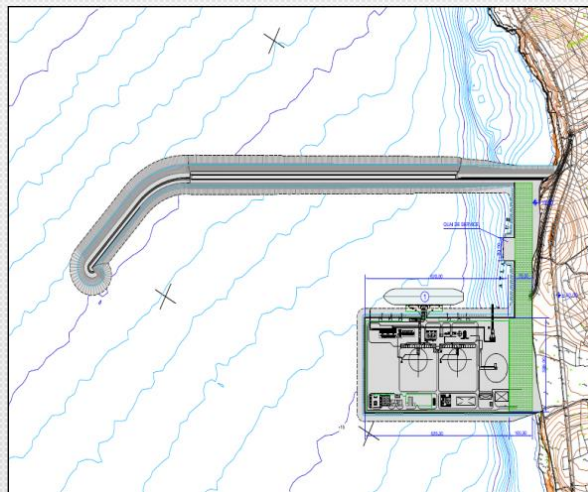


IV- the mains studies results of the three eligible projects for PPP

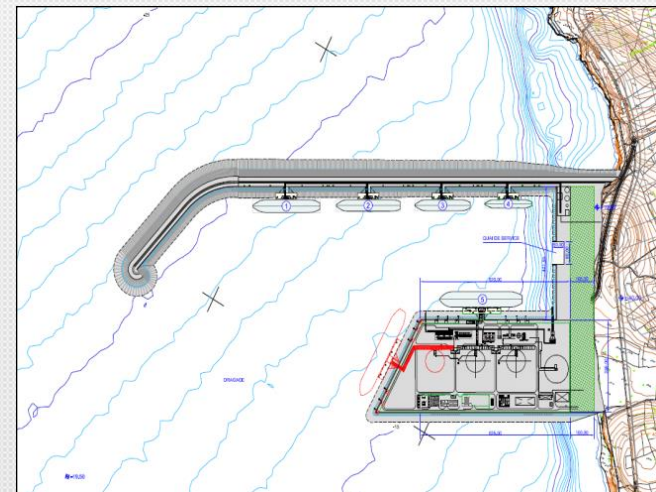
The New Port of Jorf Lasfar

➤ Project infrastructure components:

- **Protection works :**
 - Main breakwater with a length of 2200 m including the pierhead at a depth of - 21m/Zh. **(phase 1 and 2)**
- **Terminals and quays**
 - 1 post for the LNG in the first phase (Port only dedicated to LNG)
 - 4 posts built right up against the main breakwater for the hydrocarbons in the second phase (Port dedicated to LNG and Hydrocarbons)
- **Earth platform : 33 ha (LNG)**



Ground plane Phase 1



Ground plane Phase 2



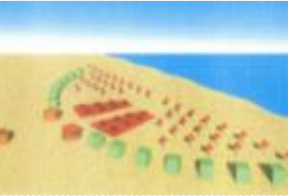
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The New Port of Jorf Lasfar

➤ forecast Project cost:

The initial cost of work is estimated as follows:

- For the first phase: **6.9 billion DH** all taxes included (745 million \$)
- for the second phase: **920 million DH** all taxes included (100 million \$)



IV- the main studies results of the three eligible projects for PPP

➤ planning for achieving studies

Study	Advancement	Deadline	Observations
Summary study	Study achieved	2013	
Summary land Study	Study achieved	2013	
Detailed technical study	Study needs to be completed by the geotechnical inputs	Dec 2015	Finalisation of this study depends on the results of geotechnical studies.
Geotechnical studies	Tender documents under preparation	July 2016	Advancement of geotechnical work very closely linked to the state of the sea.
Detailed Land study	Tender documents under preparation	Nov 2015	

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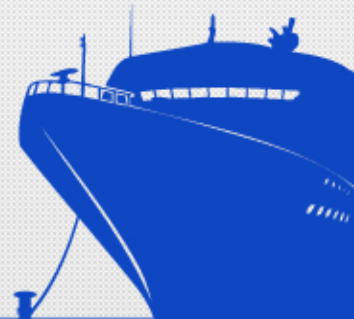
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IV- the main studies results of the three eligible projects for PPP

The New Atlantic Port of
Dakhla

➤ Objectives:

- Support the economic, social and industrial development of the region of Dakhla;
- Set up a port and industrial areas that offer the most competitive conditions for fishing industry, especially to increase the income related to small pelagic species;
- Support the creation of a new and modern fishing fleet that can not be formed competitively without an appropriate port.

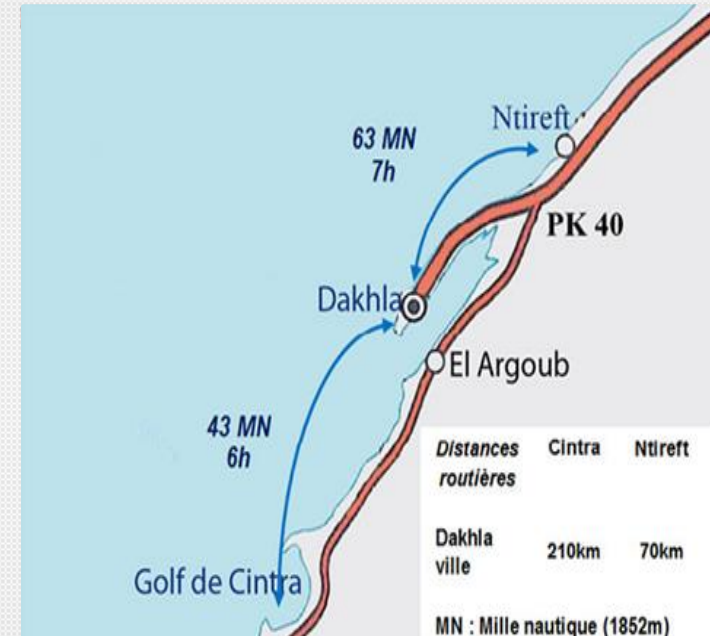


IV- the main studies results of the three eligible projects for PPP

The New Atlantic Port of Dakha

➤ Site and its advantages:

- 2 potential sites identified.
- Ntireft, the chosen site to host the new port Dakhla Atlantic, is located at 70 km to the north of Dakhla city.
- The chosen site has the following advantages:
 - Proximity to the National road RN1;
 - Availability of sufficient back ground

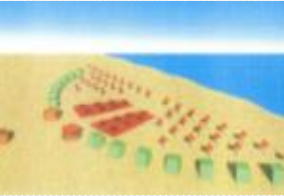


IV- the main studies results of the three eligible projects for PPP

The New Atlantic Port of
Dakha

➤ Forecast traffic /year:

- Sea products unloaded : 950 000 T
- Maritime traffic of the trade terminals:
 - Incoming : 1 500 000 T
 - Outgoing : 700 000 T
 - Total : **2 200 000 T** including 100 000 TEUs
- Dominant incoming traffic : Supply firms and population ; fuel ; cement...
- Dominant outgoing traffic : seafood products and market garden produce



IV- the main studies results of the three eligible projects for PPP

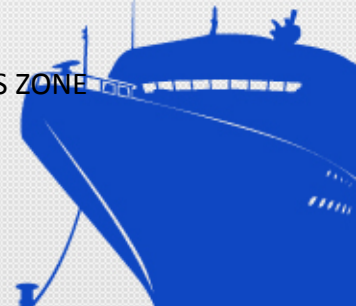
The New Atlantic Port of Dakha

➤ Project infrastructure components:

- **Chanel depth :** - 12 M/ZH
- **Protection works :**
 - Main Breakwater : 3000 ml
 - Secondary Breakwater : 850 ml
- **Terminals and quays**
 - Trade quay at -12M/ZH : 900 ml
 - Fishing quay AT -7 M/ZH :1460 ml
 - Sheltered dock for the ship lift system
- **Earth platform: 82Ha**



- HYDROCARBONS ZONE
- BULK AND CONVENTIONAL ZONE
- CONTAINERS ZONE
- FISHING ZONE
- FISHING EXTENSIONS ZONE
- SHIPYARD ZONE
- FREE platform



IV- the mains studies results of the three eligible projects for PPP

The New Atlantic Port of
Dakha

➤ forecast Project cost:

The initial cost of work is estimated at **5.7 billion DH**
(all taxes included)/ **616 million \$**



IV- the mains studies results of the three eligible projects for PPP

The New Atlantic Port of Dakhla

➤ planning for achieving studies

Study	Advancement	Deadline	Step
Economic feasibility study	Analysis of the projected port traffic : approved	Feb 2012	
	Site selection (Ntireft): approved	Aug 2013	
	Identification of the regional land planning effects : being examined	Jan 2015	
Design studies of the new port (summary and detailed technical studies)	Tender under visa	Jan 2015	Contract approval
		Dec 2016	Carrying out the technical studies
Geotechnical study	Tender documents under preparation	Sep 2015	Invitation to tender
		Oct 2016	Geotechnical results
Detailed land study	Nothing to report	Dec 2016	Contract approval
		April 2017	Carrying out the land studies

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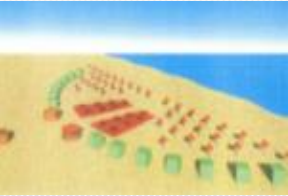
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Project	Forecast cost	
	In dirhams	In dollar
The new Atlantic port of Kenitra	8 billion DH	864 million
The new Atlantic port of Dakhla	5.7 Billion	616 million
The new port of Jorf Lasfar	6.9 billion (phase 1) 920 million (phase 2)	745 million 100 Million
Total	21.52 billion	2.32 billion

