Port of Rotterdam International
"The new frontiers of Rotterdam"

ESPO Conference, Varna, 30th May 2013 / Roger Clasquin
Objective

• To develop and manage ports abroad
  • In growth markets which are relevant for Rotterdam
  • 5 locations in 2015

Part of PoR’s businessplan 2011-2015
Creating business opportunities for Rotterdam

- For existing and new relations of PoR
- Attracting new customers to strengthen the Rotterdam cluster
- Positive impact on cargoflows
- Enhances our image as “World Class Port”
- Unlock and share market intelligence (matchmaking)
Methodology

- Location selection: commercially driven
- Strategic partner choice
- Extensive SWOT analysis
- Strict criteria regarding:
  - Commercial policy
  - Risk management
  - Investments
  - Return on investment
  - Financing
  - Governance (joint control)
  - Value & Business opportunities voor Rotterdam.
Various partnership possibilities / phases:

- Phase 1: Port Analysis
- Phase 2: Feasibility
- Phase 3: JV Set-Up
- Phase 4: Operational JV

Partnership Options

Boardroom Consultancy

Port Management Services Agreement (PMSA)

Joint Venture: Port Development Company

Examples:

- THE PORT AUTHORITY OF NY & NJ
- SUAPE
- TEDA
- PORTO CENTRAL
- PORT OF SOHAR

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Many opportunities were analysed……, but …
…what projects are we looking for?

- Port Operator (terminal operations)
- Single User Port/Terminal
- Industrial Port Complex
- Greenfield
- Brownfield

Brownfield projecten are only considered if:
- There is sufficient room for development
- The location offers sufficient biz opportunities
- The location is of strategic interest for our customers
- The location offers opportunities to create new partnerships
Current projects and prospects with potential:

Focus Areas

- **Main Projects**
- **Prospects**

Countries and regions marked on the map include:
- PORTO CENTRAL
- CEYHAN
- SOHAR
- NACALA
- TEDA NANGANG
- BARRANQUILLA
- JOHOR

These projects and prospects are areas of potential development for the Port of Rotterdam.
Competition Port of Rotterdam International

Hamburg-Le Havre range

- Amsterdam
- Antwerpen
- Hamburg
- Gent
- Duisburg
- Le Havre / Rouen / Paris

Azië (China)

- Zekerstellen van grondstoffen
- Veel kapitaal
- Actieve ontwikkelaar in Afrika, Zuid-Oost Azië
- Grote interesse in Brazilië
Existing institutional links:

- Espirito Santo State, Brazil
- Suape, Brazil
- Brazilian Ministry of Ports
- Tianjin Economic Development Area, China
- Senegal (CSR project)
- Rosmorport, Russia
- Port of Constantza, Romania
- Qatar Petroleum, Qatar
- Port of New York and New Jersey, USA
- Vinalines, Vietnam
- Port of Taranto, Italy
- Saldanha Bay, South Africa

Good governmental relations are key!
Track record: Sohar, Oman

Sohar 2002
- Greenfield location
- 50/50 JV with Omani Government
- Investment (equity) PoR: € 3.9 miljoen
- 2007: concession adjustment: van 2.000 naar 6.400 hectare / duration: from 25 to 42 years

Sohar, vandaag
- 1,500 hectares leased out
- 1,900 vessel calls / 44 mio ton
- US$ 14 miljard in FDI (30% van FDI in Oman)
- Dividends for PoR
- New investment PoR in 2008 (Vale jetty) ➔ Equity: € 16,6 mio

Sohar, toekomst
- Free Zone development - 4.500 hectares
- Expansion of Vale pelletizing plant
- Expansion of Orpic refinery
- Expansion liquid bulk terminal
- Expansion container terminals
- Rail connection with GCC states
- Airport
Sohar development – with Rotterdam's customers

“After Vale’s successful inauguration of its new iron ore transport hub in Oman…other dry bulk shippers are now flocking to the Port of Sohar”


“Hong-Kong based global operator Hutchinson Port Holdings signed an agreement with Sohar port authority to expand its joint venture”

- Lloyd’s List Jan. 2013
Porto Central: Greenfield port project in Brazil

- 1,500 hectare (15 sq.km)
- Deepwater port + industrial complex
- Centrally located in proximity of: offshore oil, mining and agribulk production areas

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<thead>
<tr>
<th>Phase</th>
<th>Offshore supply</th>
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<tbody>
<tr>
<td>Phase 1</td>
<td>Liquid bulk (Oil &amp; Gas)</td>
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<td>- Tank storage</td>
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<tr>
<td>Phase 2</td>
<td>Dry bulk (Minerals)</td>
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<td>- Iron ore, pig iron</td>
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<td>Phase 3</td>
<td>Steel</td>
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<td>- Shipyards</td>
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<td>Phase 4</td>
<td>General cargo</td>
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<td></td>
<td>- Granite and marble</td>
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- Capacity: +/- 200 mio tons
- Phased development: 2014 – 2024
1. Creating business opportunities for PoR relations

2. Attract and tie down companies for Rotterdam:
   - Bio-fuel/biomass market in Brazil
   - Strengthen relation with global traders
   - Strengthen relation with main Brazilian players.

3. Initiate, maintain, grow cargoflows:
   - Energy port ➔ biomass
   - Fuel port ➔ bio fuels, crude oil
   - Dry bulk ➔ iron ore, agribulk
Thanks for listening!
Any questions?