Kingdom of Morocco
Tanger Mediterranean Special Agency

Tanger Med:

A world class platform for industry and logistics

Hamburg, Germany
February 2\textsuperscript{nd} 2010
I. Vision & Strategy
II. The Tanger Med Port Complex
III. The Great Industrial Platform
A unique geographical location
General cargo and container traffic 1990-2005
## Evolution of the container vessel’s size

<table>
<thead>
<tr>
<th>Generation</th>
<th>TEU (max)</th>
<th>LOA (m)</th>
<th>Width (m)</th>
<th>Water depth (m)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1972</td>
<td>1500</td>
<td>225</td>
<td>24,5</td>
<td>9,00</td>
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<tr>
<td>1980</td>
<td>3000</td>
<td>275</td>
<td>27,5</td>
<td>10,00</td>
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<td>1987</td>
<td>4500</td>
<td>300</td>
<td>32,2</td>
<td>11,50</td>
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<td>1997</td>
<td>6600</td>
<td>320</td>
<td>40,00</td>
<td>14,30</td>
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<td>1999</td>
<td>8000</td>
<td>347</td>
<td>42,6</td>
<td>14,50</td>
</tr>
<tr>
<td>2007</td>
<td>13.000</td>
<td>398</td>
<td>56,4</td>
<td>16,00</td>
</tr>
</tbody>
</table>
Tanger Med:
A strategic location on the Gibraltar Straits

- Zero-deviation of East-West Maritime routes
- Point of minimal distance between Africa and Europe
The Tanger Med complex: A dual mission

• A transhipment platform dedicated to international and regional containers flows.

• An import export port devoted to improve the territory competitiveness.
An integrated development approach

Port

Activity Zones

The Great Industrial Platform

Territory
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The Tanger Med port complex

- 8 km of sea walls
- 8 km of berths
- 1000 hectares of land

The final capacity of the complex: 8,2 millions TEU
Tanger Med Containers facilities:

- **All terminals conceded to professionals operators:**

  Terminal 1 conceded to APM Terminals
  Effective since July 2007.

  Terminal 2 conceded to Eurogate – Contship / MSC / CMA-CGM – effective since August 2008.

  Terminal 4 conceded to Marsa Maroc - Effective in 2014

  Terminal 3: will be conceded according to the evolution of port infrastructure demand

- **Productivity of Tangier Med terminals meet international transhipment platform**

  Terminal 1 is one of the worldwide Top 3 APM Terminals
Infrastructure for containers: Terminals 1 & 2
An existing capacity of 3 millions TEU
Tanger Med:
Passengers & RORO Ports

- **A terminal RoRo**
  
  Effective since November 2008 with 4 rotations/day to Algesiras

- **A Passengers port**
  
  8 berths with a potential of 50 departures/day

  A maritime and a railway stations

**Effective at the end of Q1 2010**
Tanger Med 1: Cars Terminal

- **Capacity of** 1 million cars:
  - Export of cars assembled in Morocco
  - Transhipment of new cars

- **13 hectares** granted to Renault
  **7 hectares** in common user

- **Start of activity in** 2011.
Tanger Med
Logistics Free Zone Medhub (1/4)

• Dedicated to logistic and light processing activities “world-world” oriented

• Strengthening of the port competitiveness by providing an added value to the transshipment activities

• Custom Free Zone unified with the Port
Tanger Med
Logistics Free Zone Medhub (2/4)
Tanger Med Logistics Free Zone Medhub (3/4)

Key figures:

- 250 hectares with a potential of expansion
- More than 500 million euros of investments (development and warehouses) for the phase 1
- 10 000 jobs expected to be created at the end of the first phase
- 70 millions euros already engaged for warehouse construction (100,000m²)
- First Clients : Makita (Japan), Geodis (France)
• Warehouses (HQE Class A) from 300 to 10,000 m² with possible expansion to 40,000 m² (rental period: 1, 5 or 10 years)
• Available plots from 10,000 m² for a rental period of 20 years.
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A fully integrated multimodal platform

Zones of activities dedicated to services, industry, logistics and distribution inside more than 5000 hectares of land

- Directly linked to Tanger Med Port

Connected to a very diversified infrastructure:

- 53 km of highways connected to the national network
- 45 km of railways connected to the national network
- Port – Tangier Airport: 40 min
The Great Industrial Platform of Tanger Med
The Great Industrial Platform Organization

- General Industry
  - Tanger Free Zone
- Automotive
  - Tanger Automotive City
- Offshoring
  - Tetuan Shore
- Other Sectors
  - Electronics, Aerospace, Textile, Agro-food...
Industrial Free Zone: Tangier Free Zone (1/2)

- **Industrial zone export oriented in all sectors**
  
  Automotive, aerospace, textile and garment, agro food..., 

- **400 companies implemented**

- **40 000 jobs created**

- **More than 1.2 billion € of TO**
Industrial Free Zone:
Tanger Free Zone (2/2)

- **Automotive components**
  
  Yazaki, Sumitomo, Lear, Fujikura, Delphi, Polytech, CIE Automotive, Trèves, Antolin..

- **Aerospace**
  
  Souriau, Daher, Dion...

- **Electronics**
  
  Emdep, Tronico, Premo...
Tanger Automotive City:
A dedicated zone to automotive activities

- A platform linked to RENAULT further development in Tangier region
- An ideal environment for car component suppliers Tiers 1, 2 & 3
- A synergy between the Automotive zone and the port to reach Spanish car manufactures → more than 3 millions cars at less than 24 hours
- A professional training centre devoted to the automotive sector
- A logistic services for supply, storage and delivery

Renault will set up an important car assembly plant in Tangier region (Tanger Med area)

- 400,000 cars / year by 2014
- Capacity : 60 cars / hour
- 6,000 direct jobs
- 30,000 indirect jobs
Tetouan Shore: Dedicated Zone to Offshoring Activities

**Key Figures**
- 28 Hectares
- 120,000 M² of offices and services
- 120 Millions euro of investment
- ~12,000 jobs to be created

**Positioning**
- Spanish speaking call centres
- French speaking ITO & BPO
- Engineering and support activities for free zones in the region
- Geographical and cultural proximity with France and Spain
Tanger Med: A high value proposal for the investor

- A unique location, opening a 600 million pop. Market
  - Europe- North & West Africa – Mediterranean Region
- A world class hub, with full connectivity to international and national flows
- Skilled and very competitive human resources with a very high educational and training institutions in the region
- Free trade agreements: EU, US, Arab Countries and Turkey
  - Products manufactured in our free zones have also the Morocco Label
- Attractive status:
  - General Free Zone Status:
    - Full exemption of custom duties and VAT
    - Full exemption of corporate tax for the first five years, then 8.75% for the 20 following years and 17.5% from the 26th year
  - Additional incentives for specific and very large scale projects
- TMSA is acting as a one-stop shop for the client
Thank you for your attention