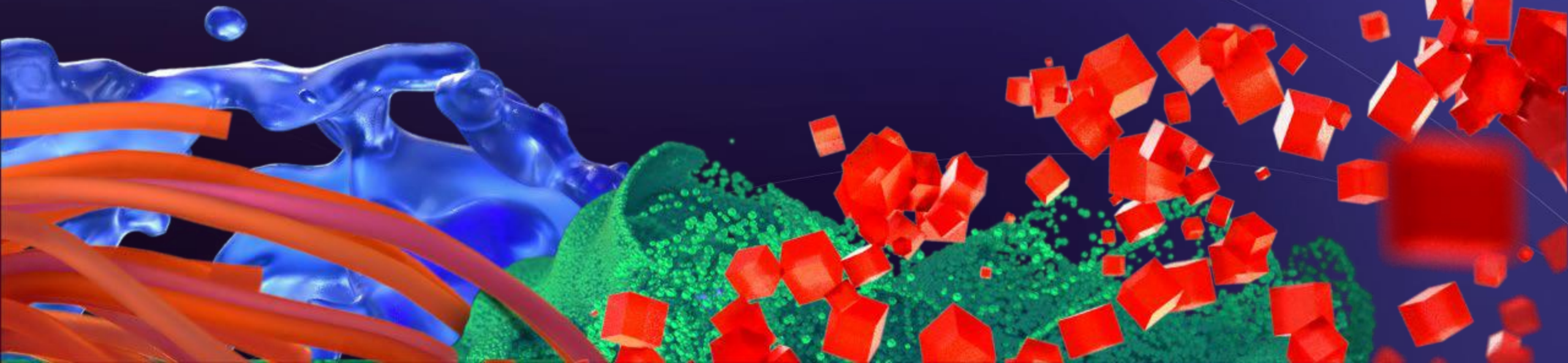




DP WORLD

DP WORLD IN SUB-SAHARAN AFRICA





01 GLOBAL OVERVIEW



SUPPORT FROM A GLOBAL NETWORK, REPRESENTING >10% OF GLOBAL TRADE



10%+

OF WORLD TRADE MOVES THROUGH
OUR NETWORK



73

COUNTRIES



106,500

EMPLOYEES



92M TEU

GLOBAL CAPACITY
(c.10% of global trade volumes)



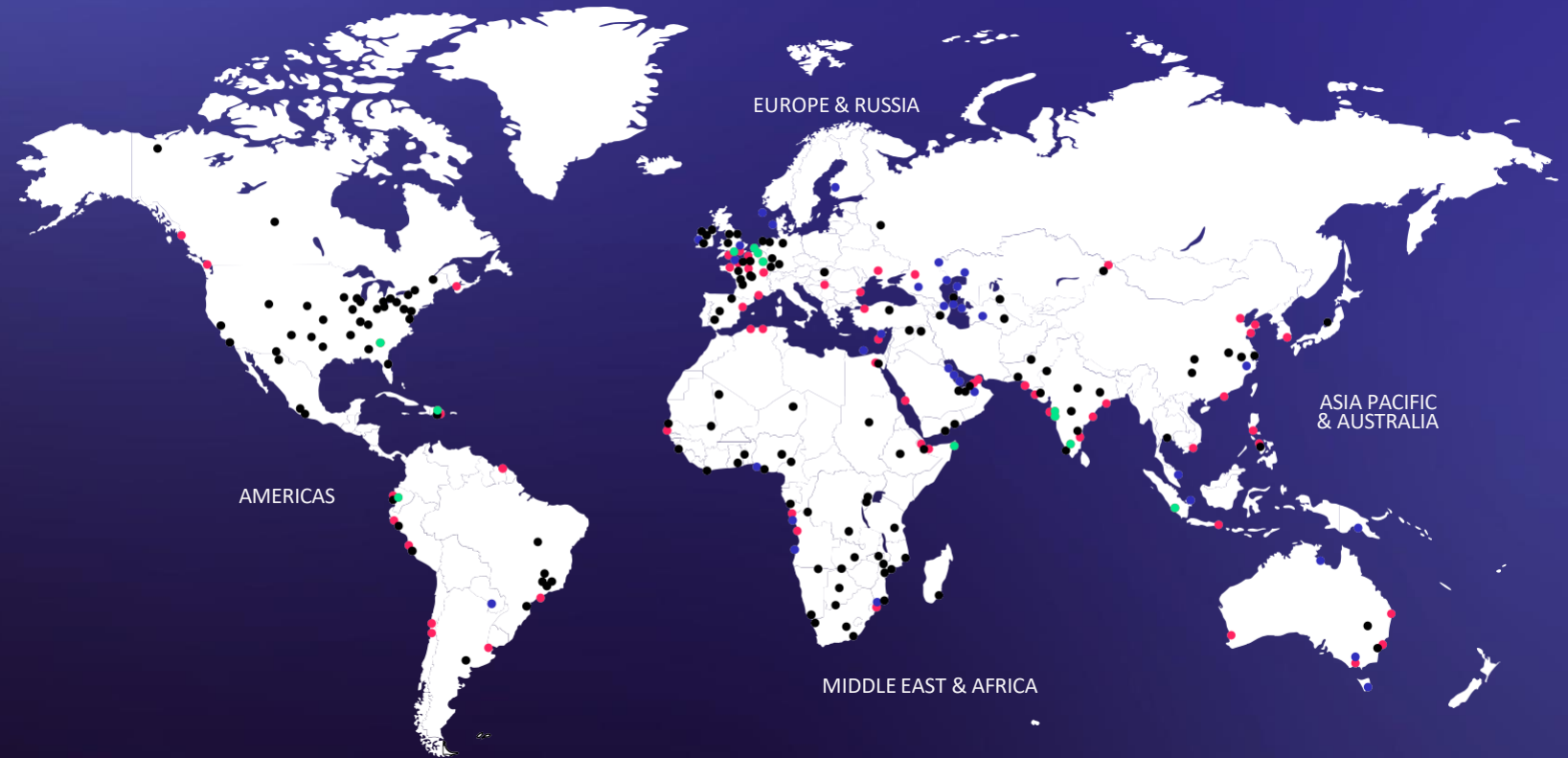
\$37BN

CAPITAL EMPLOYED



>295

BUSINESS UNITS IN 73 COUNTRIES
ACROSS 6 CONTINENTS



LOGISTICS



ECONOMIC ZONES



PORTS & TERMINALS



MARINE SERVICES

OUR PRESENCE ACROSS THE SUPPLY CHAIN



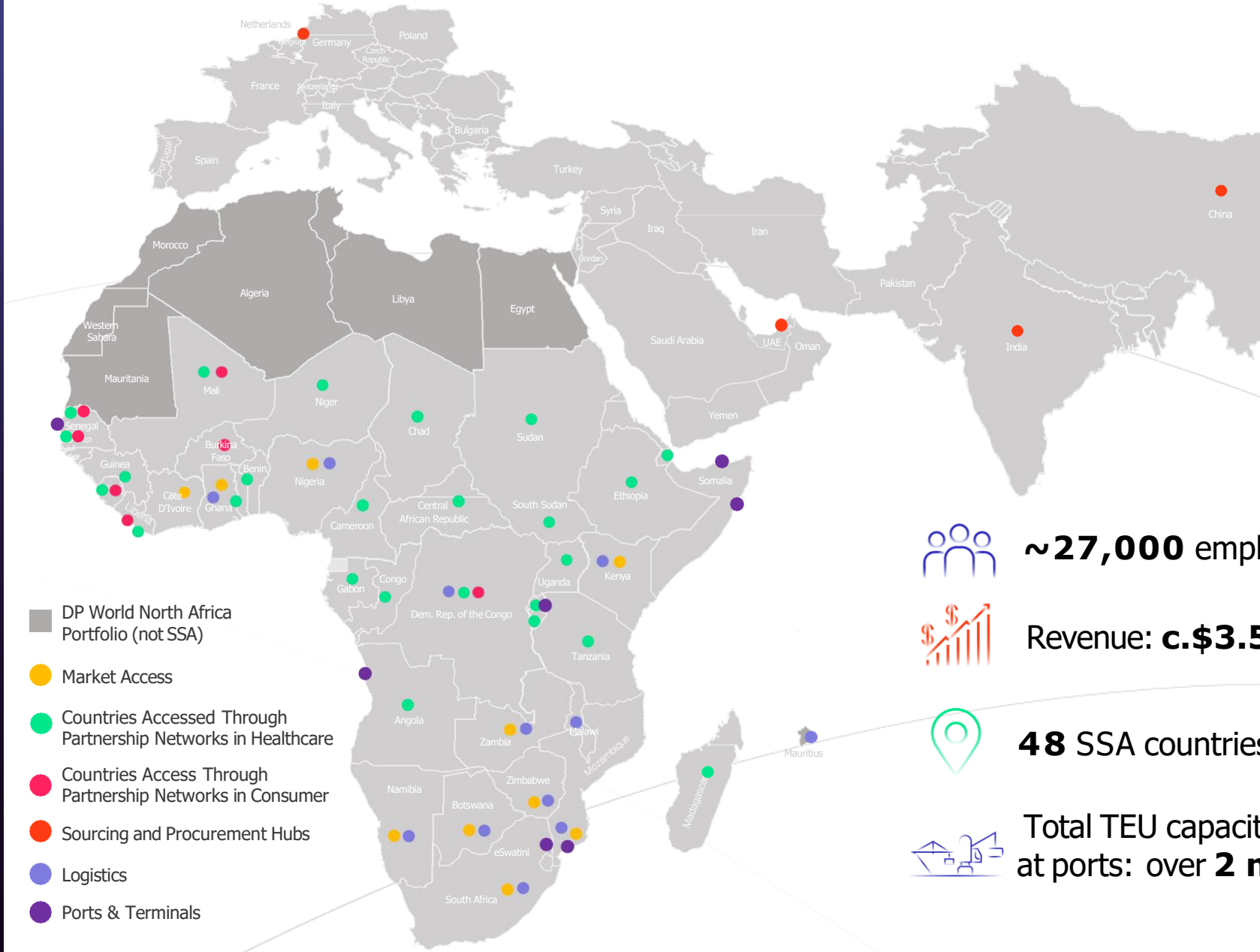
TECHNOLOGY-LED SOLUTIONS TO REDUCE INEFFICIENCIES ACROSS THE SUPPLY CHAIN

Visibility and transparency, automated planning, digital rates, instant access and control, trade finance and insurance, enterprise IT solutions, and systems plus B2B eCommerce.

02 SUB- SAHARAN AFRICA (SSA) OVERVIEW



DP WORLD'S FOOTPRINT & SCALE IN SSA



~27,000 employees



Revenue: **c.\$3.5bn**



48 SSA countries



Total TEU capacity at ports: over **2 million**



203 total warehouses;
1.5 million sqm
(owned/managed)



c.260,000 direct
points of sale

- 180,000 in Nigeria
(460 000 incl indirect
points of sale)
- 55,500 in Ghana



>6,300 fleet

OUR SOLUTIONS IN THE SSA REGION



PARKS & ECONOMIC ZONES

- ✓ Logistics Parks
- ✓ Industrial Parks
- ✓ Free Zones
- ✓ Special Economic Zones
- ✓ Pre-built Warehouses
- ✓ Serviced Land Plots
- ✓ Offices & Business Centres
- ✓ Built to Suit



FREIGHT MANAGEMENT

- ✓ Ocean & Air Freight Forwarding (including Customs Clearance)
- ✓ Road Freight Management
- ✓ Specialised Transportation
- ✓ Multi-modal Freight
- ✓ Inland Container Terminals
- ✓ 4PL and Logistics Control Tower



CONTRACT LOGISTICS

- ✓ Warehousing, Fulfilment, eCommerce and Value-added Services
- ✓ Manufacturing Support & Assembly Services
- ✓ Export Packing
- ✓ Reverse, Repair and Service Parts



MARKET ACCESS

- ✓ Integrated Market Access Services & Logistics Solutions
- ✓ Managing Distributorship Relationships
- ✓ Multi-market Aggregation
- ✓ Sourcing & Procurement
- ✓ Emergency Relief & Kitting
- ✓ Marketing & Promotion Services
- ✓ Supply Chain Control Tower

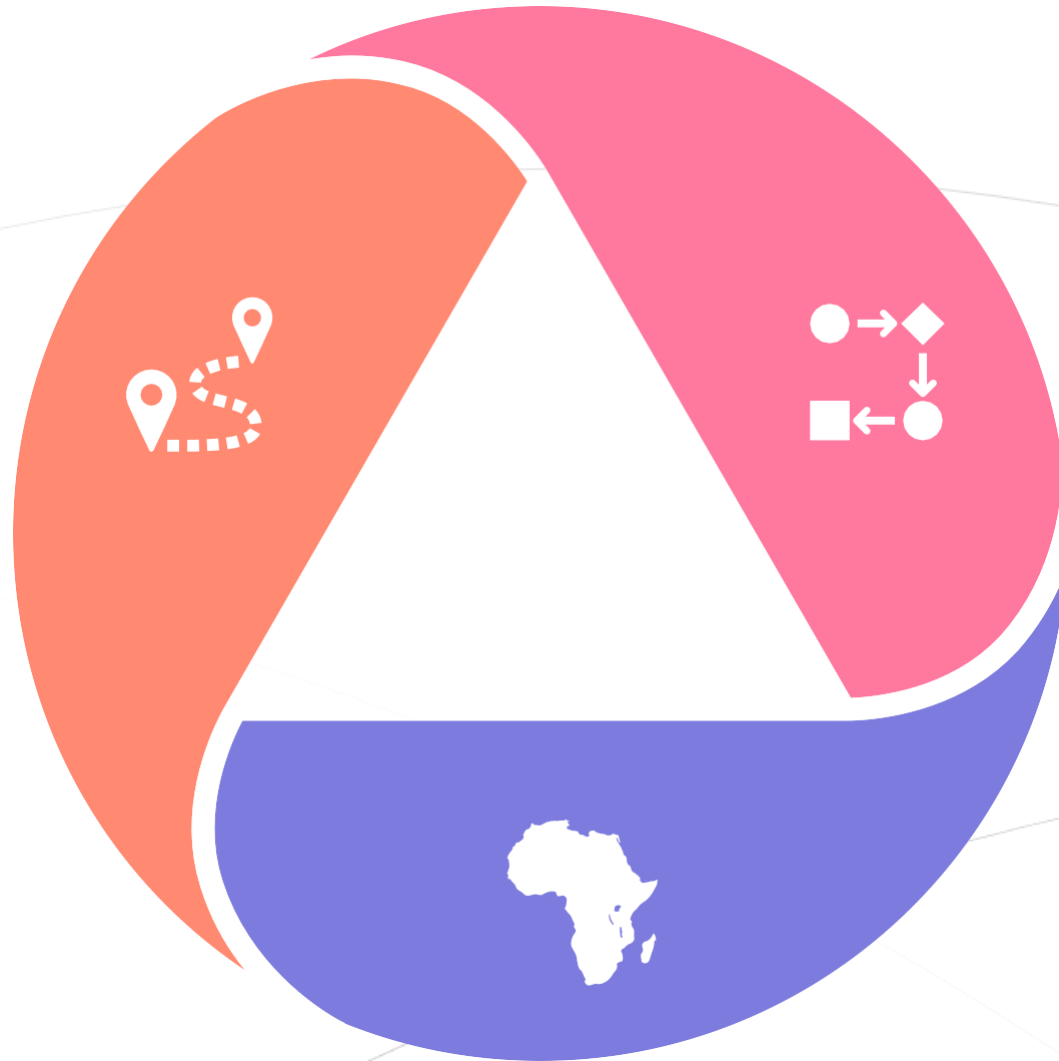


PORTS & TERMINALS

- ✓ Container services
- ✓ RORO & Finished Vehicle Solutions
- ✓ Breakbulk
- ✓ Dry & Liquid Bulk
- ✓ Crane Services
- ✓ Port-Based Logistics Solutions
- ✓ Cruises & Ferries
- ✓ Livestock

DP WORLD'S SSA STRATEGY

Lead the future of Africa trade, working towards providing integrated end-to-end supply chains for our customers and partners



1

KEY PATHWAYS

- SCALE AND ESTABLISH NEW PORT AND UNIFEEDER NETWORK TO SERVE AS KEY MARKET GATEWAYS
- CONNECT AFRICA TO THE WORLD THROUGH INTEGRATED FORWARDING
- FACILITATE END-TO-END LOGISTICS CONNECTING PORTS THROUGH SELECT FOCUS ON KEY SECTORS WITHIN EACH PRIORITY MARKET

2

KEY CAPABILITIES

- PORTS
- UNIFEEDER
- FORWARDING
- FREIGHT
- CONTRACT LOGISTICS
- MARKET ACCESS

3

KEY MARKETS

- | | |
|------------------|-----------|
| • SOUTH AFRICA | • NIGERIA |
| • COPPERBELT | • KENYA |
| • TANZANIA | • SENEGAL |
| • HORN OF AFRICA | • ANGOLA |
| | • DRC |

03 PORTS & TERMINALS



TAILORING OUR SERVICE OFFERING TO OUR CUSTOMER NEEDS

CONTAINER SERVICES

DP World's vast network of ports & terminals has the capacity to handle over 90 million TEUs every year.

RORO & FINISHED VEHICLE SOLUTIONS

With 16 RoRo enabled terminals around the world, we're the first choice for OEMs and car carriers.

BREAKBULK

Across our network we have handled all types of breakbulk, ensuring the quick and seamless movement of the most specialized cargo.

DRY & LIQUID BULK

Our specialized dry & liquid bulk services ensure the safe and secure movement of cargo through our terminal operations.

CRANE SERVICES

Our World Crane Services team offer expert advice and practical solutions to bring optimum efficiency to any terminal.

PORT-BASED LOGISTICS SOLUTIONS

We match our world class port infrastructure with enhanced landside logistics capabilities.

CRUISE & FERRIES

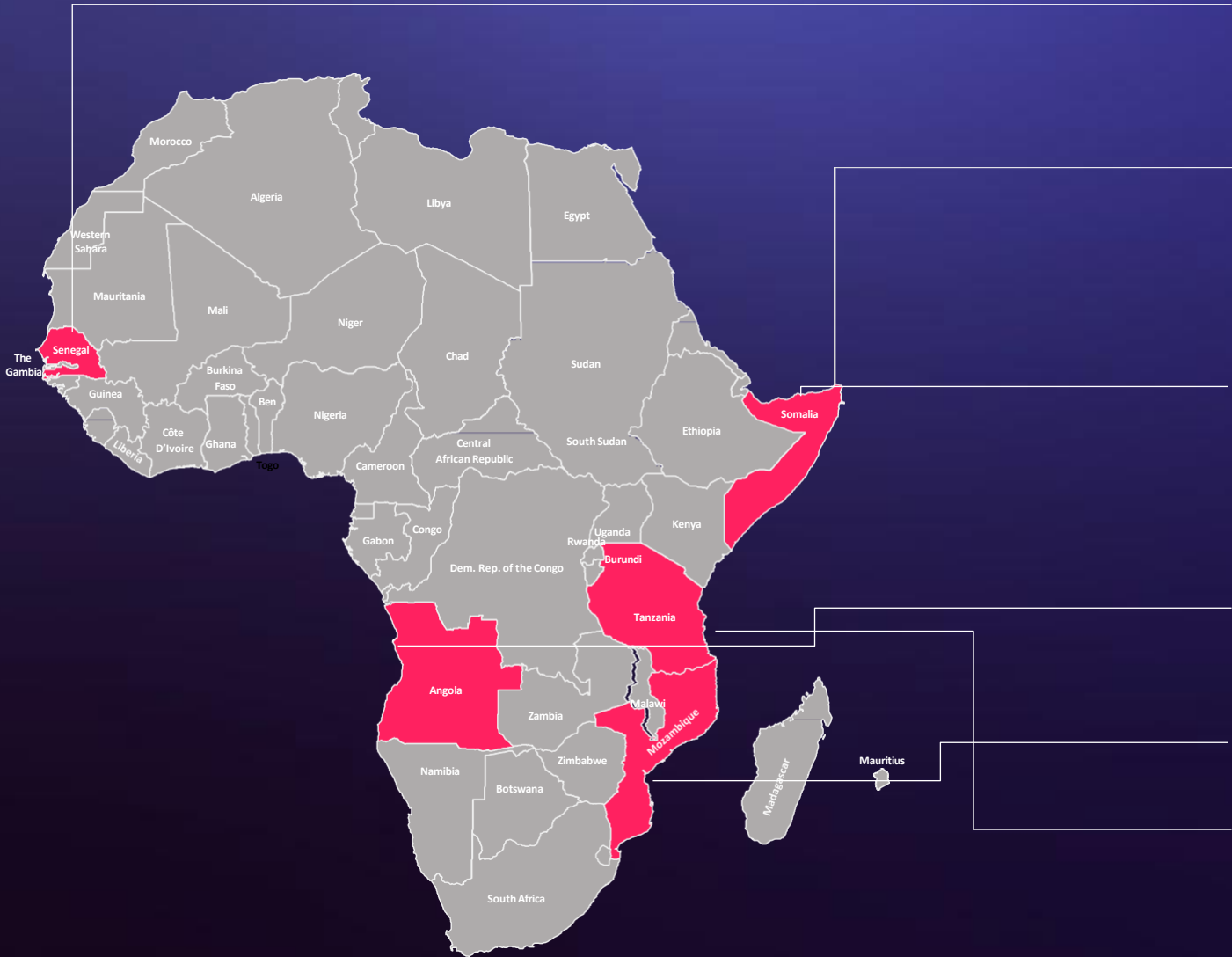
We offer a safe passenger gateway for millions of people all over the world.

LIVESTOCK

We support developing economies to tap into a global market in livestock trade.



REGIONAL MARINE TERMINALS



Dakar (Senegal)

The Dakar port facility is one of our biggest port investment commitments in Africa with a total investment of \$300 million (USD).

Bosaso (Somalia)

DP World’s Bosaso Multipurpose Port is a conveniently positioned in Putland’s vibrant commercial hub that serves as a crucial entry point for northeastern Somalia’s imports. The Port is a vital gateway for robust economic connection for major cities around the Horn of Africa region.

Berbera (Somaliland)

Berbera Port is the only prominent multipurpose port in Somaliland, working as the new integrated maritime, logistics, and industrial hub in the Horn of Africa. It focuses on contributing to Somaliland’s economy and those of surrounding local communities in neighboring countries.

Luanda (Angola)

We have invested US\$190 million to improve the terminal to help Angola achieve its ambitions for economic growth and to make it a trade hub along the western coast of Southern Africa. The terminal is the eighth port facility currently managed and operated by our Africa and Middle East region.

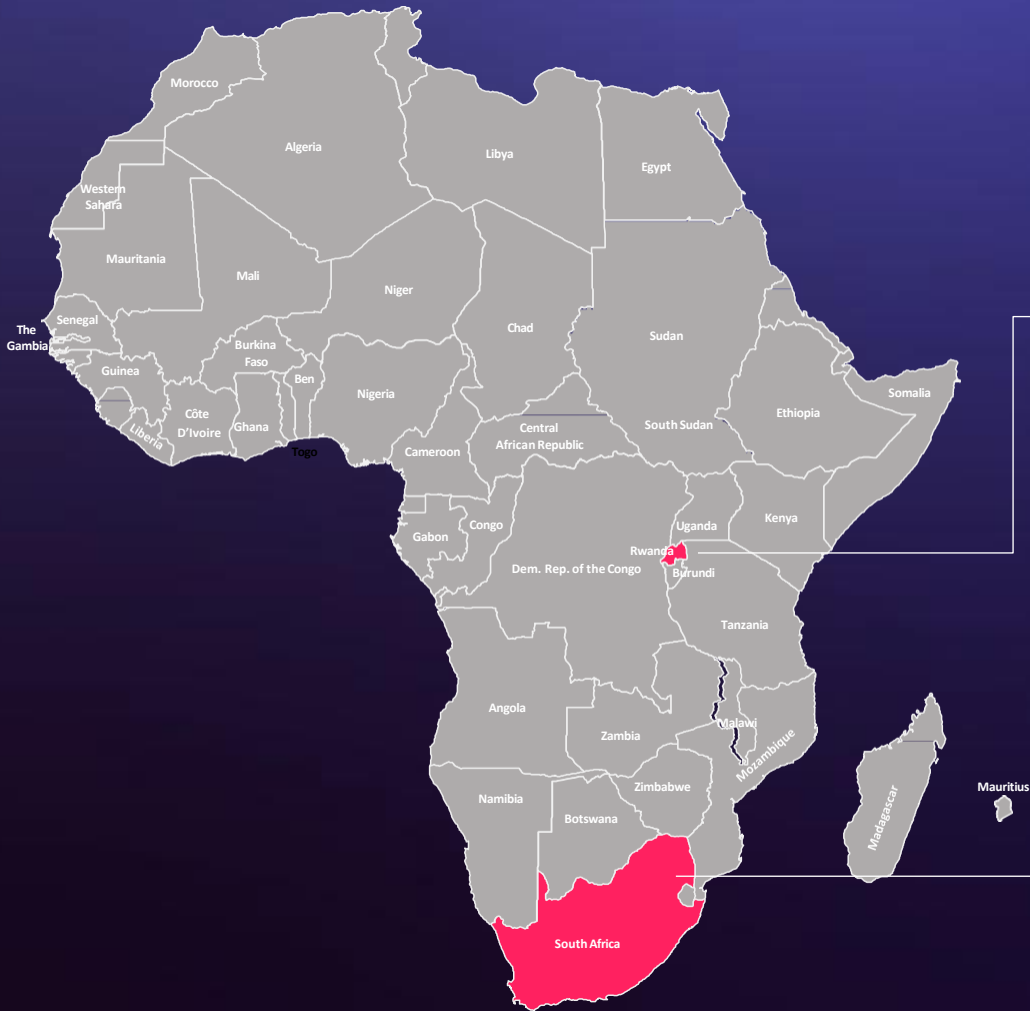
Maputo (Mozambique)

Strategically located between industrial hubs in Southern Africa and major economic regions of Eastern and Southern Asia, Maputo has become a core gateway to Southern Africa’s vast economic hinterland.

Dar es salaam (Tanzania)

The Port will connect to the hinterland of sub-Saharan Africa through a network of roads, highways, railways and dedicated freight corridors and ports, supporting the growing demand for logistics solutions across the continent and connecting businesses in the region to global markets. The operational handover is planned for February 2024.

KEY DRY PORTS



Kigali (Rwanda)

Kigali is a one-stop-shop logistics platform operating from the first inland dry port in East Africa. Managing operations at the dry port since 2016, DP World in Kigali aims to support Rwanda's ambitions to establish itself as a key services-and-trade hub for the region.

Komatipoort (South Africa)

Komatipoort's boasts a strategic location, full-service offering, and seamless link via the Maputo Corridor to Maputo's modern and efficient container terminal – where there is no vessel and port congestion and with fixed berthing windows available to major shipping lines. This offers customers considerable transport savings and avoids delays for consignees in Mpumalanga, Limpopo, and Gauteng.



05 MARKET ACCESS





MARKET ACCESS FOOTPRINT

- DP World North Africa Portfolio (not SSA)
- Market Access
- Countries Accessed Through Partnership Networks in Healthcare
- Countries Access Through Partnership Networks in Consumer
- Sourcing and Procurement Hubs



World Logistics Passport

Unlocking Trade and Logistics
in South Africa

THE PROBLEM



TRADE BARRIERS

WE UNDERSTOOD

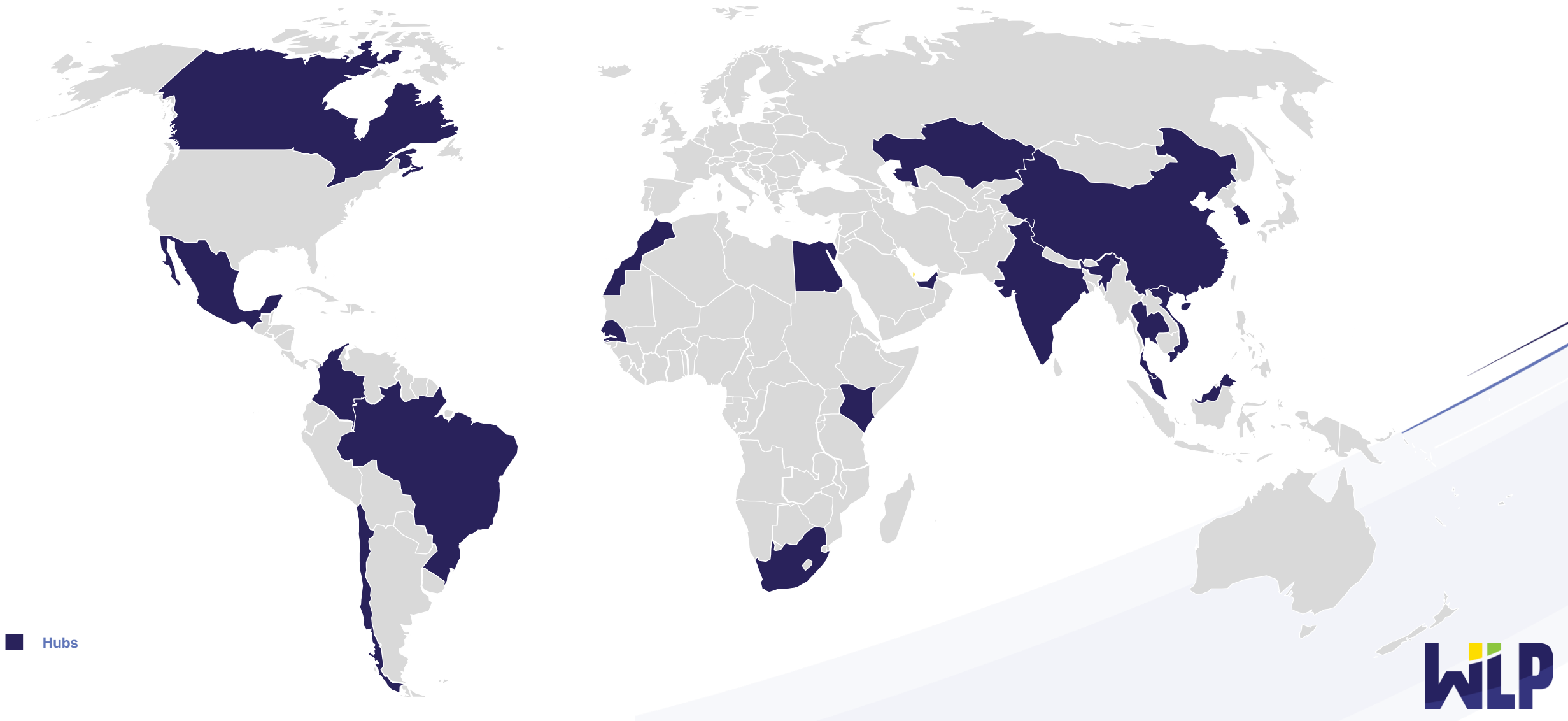
— ● —
Bottlenecks at
different touchpoints
of the logistics
journey

— ● —
Current supply
chain is **vulnerable**
to **external shocks**

— ● —
Barriers differ from
goods and
services across
borders

— ● —
Fragmented trade
stakeholders
impact the
efficiency

World Logistics Passport – Network





What is the WLP

A global initiative by the government of Dubai which incorporates private and public stakeholders to facilitate faster and more cost-effective international trade through its network of global trading mega hubs.

The WLP is the world's first multi-modal global freight loyalty scheme which benefits businesses through a reduction in their supply chain costs, making moving goods and services faster, and more efficient.



CROSS – FUNCTIONAL ENGAGEMENT

Combining fragmented stakeholders across borders



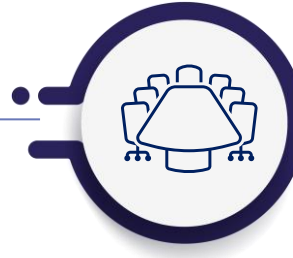
Ports & Airports

- DP World
- Grimaldi Group
- Emirates Sky Cargo
- Thai Airways
- Latin America Cargo City
- LATAM Airline (in process)



Governments

- Bahrain Ministry of Transportation and Communication
- Colombia Ministry of Commerce, Industry and Tourism
- Kenya Revenue Authority
- Colombia Ministry of Transport
- UAE Customs
- Mexico Customs



Associations

- India Federation of Freight Forwarders' Associations
- South African Association of Freight Forwarders
- Dubai Chambers
- Arab Colombian Chamber of Commerce
- Mexico City Chamber of Commerce
- Australian Chambers of commerce



06 TECHNOLOGY



SSA TECHNOLOGY

Tightly integrated with Global capabilities, SSA technology focuses on developing unique client-facing capabilities for the region.

End to end network visibility, integrated freight management, network planning, inventory management and analytics.



Integration of offerings like, CargoesRunner, CargoesFinance, and other operating systems into an integrated digital platform for Clients, Principals and BCOs.

Digital sales and ordering platform integrated into inventory management, linking Principals, integrated payment solutions and cash flow financing.



Using dynamic market intelligence to price integrated solutions and support advanced commercial models to achieve collaborative benefits.

Using a data integration approach to optimise transportation and warehouse management operations .



Unlocking insights from data to support trade-off decisions in the optimization of the end-to-end supply chain.

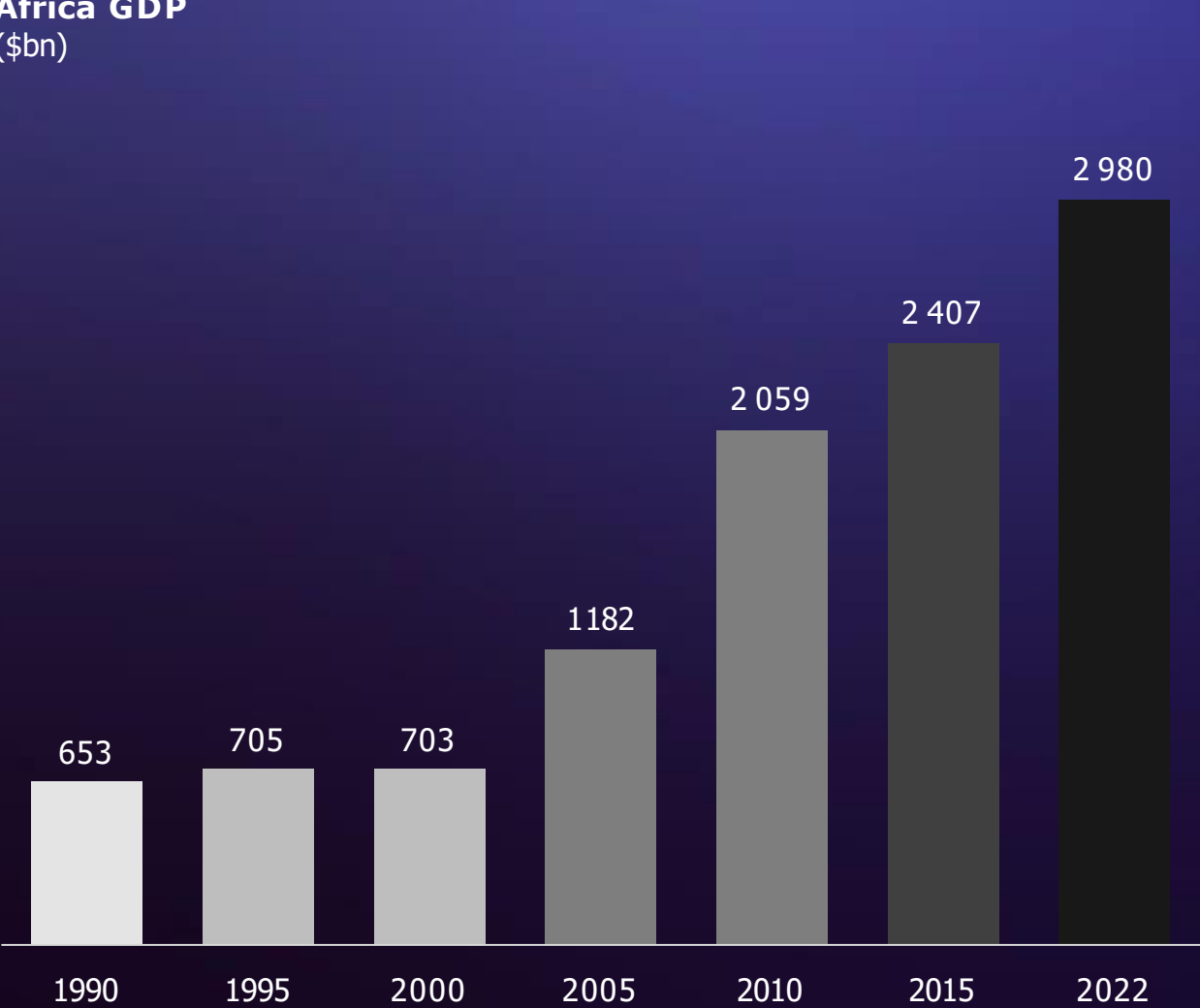


DP WORLD

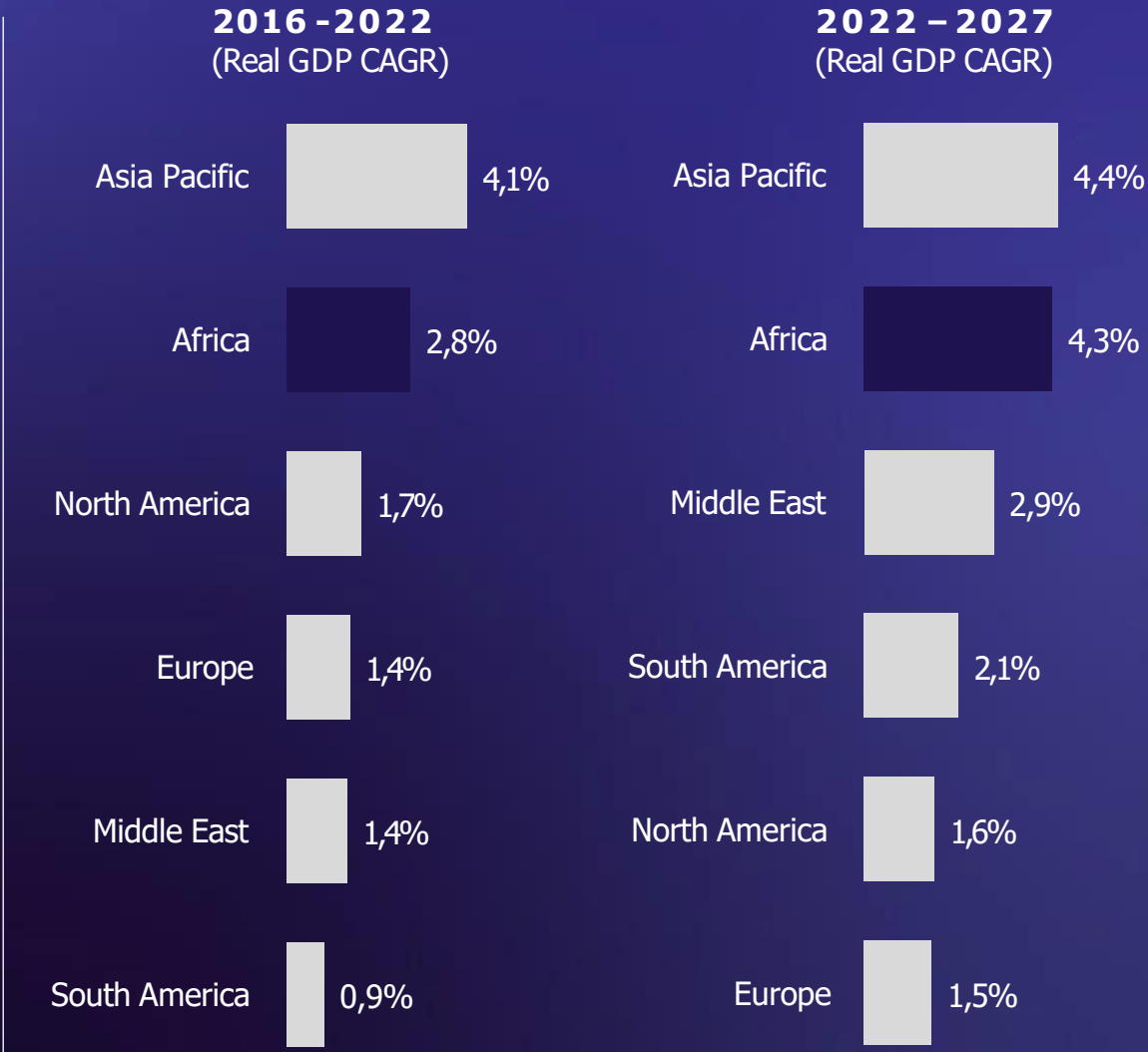
SSA MACRO OVERVIEW

AFRICA HAS EXPERIENCED STRONG GROWTH DRIVEN BY EMERGING CONSUMER CLASS & RESOURCES

Africa GDP
(\$bn)



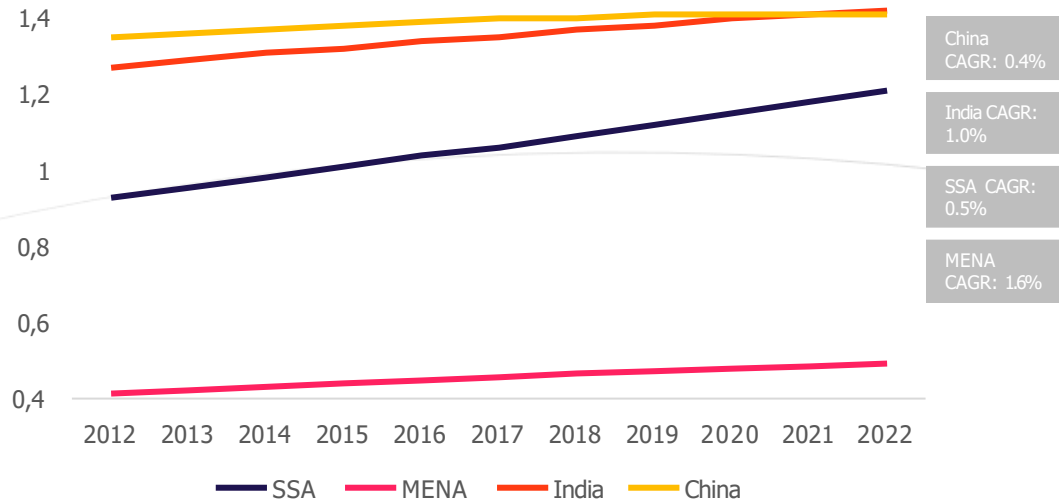
*Source: IMF Data mapper, Accessed on 2023/02/14



* Globally significant levels of inflation as a result of quantitative easing, with interest rates ramping up putting further pressure on growth – next 12 – 24 months expected to contain significant volatility for Africa and other emerging markets as developed markets start to slow down consumption and manufacturing

SSA: A VIBRANT & DIVERSE REGION WITH SIGNIFICANT GROWTH POTENTIAL

Population growth (bn)



70% of SSA population <30 years old and 3% >65 years old. Africa median age is 18 years old – median age for every other continent is at least 13 years higher

Logistics in Africa expected to double over the next 3-5 years

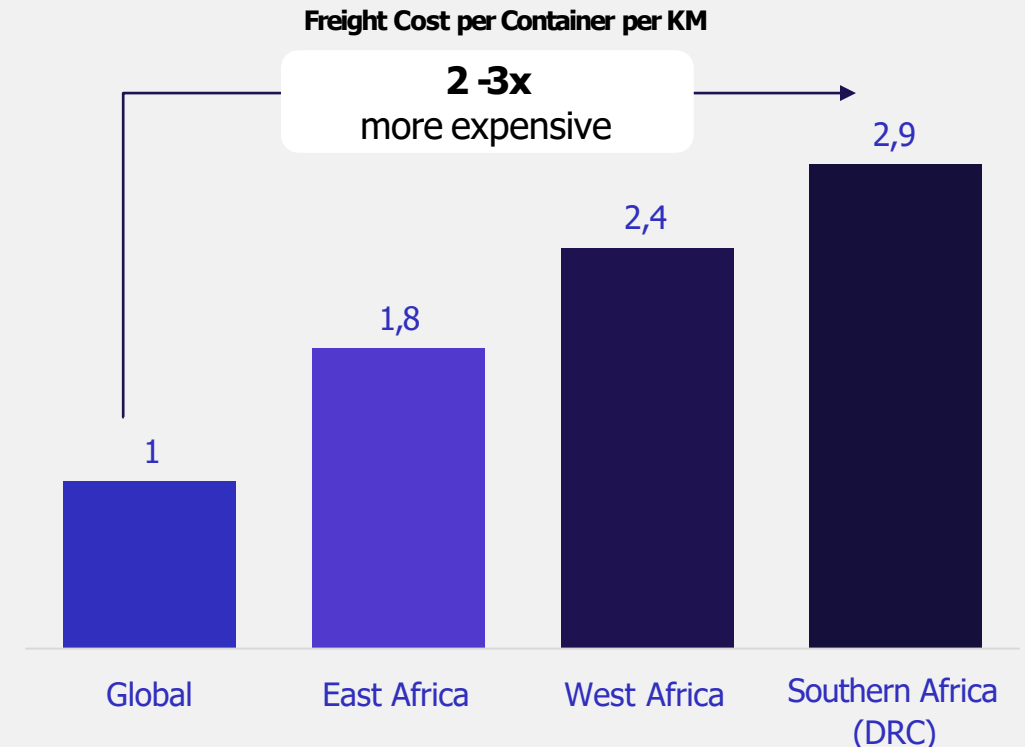
Intra-Africa trade growing at 3.9% CAGR

Inefficient infrastructure and high logistics costs, 2-3x more expensive than leading economies

SSA trade is low at 3% of global trade (expected to grow to 12% by 2035 with successful AfCFTA implementation)

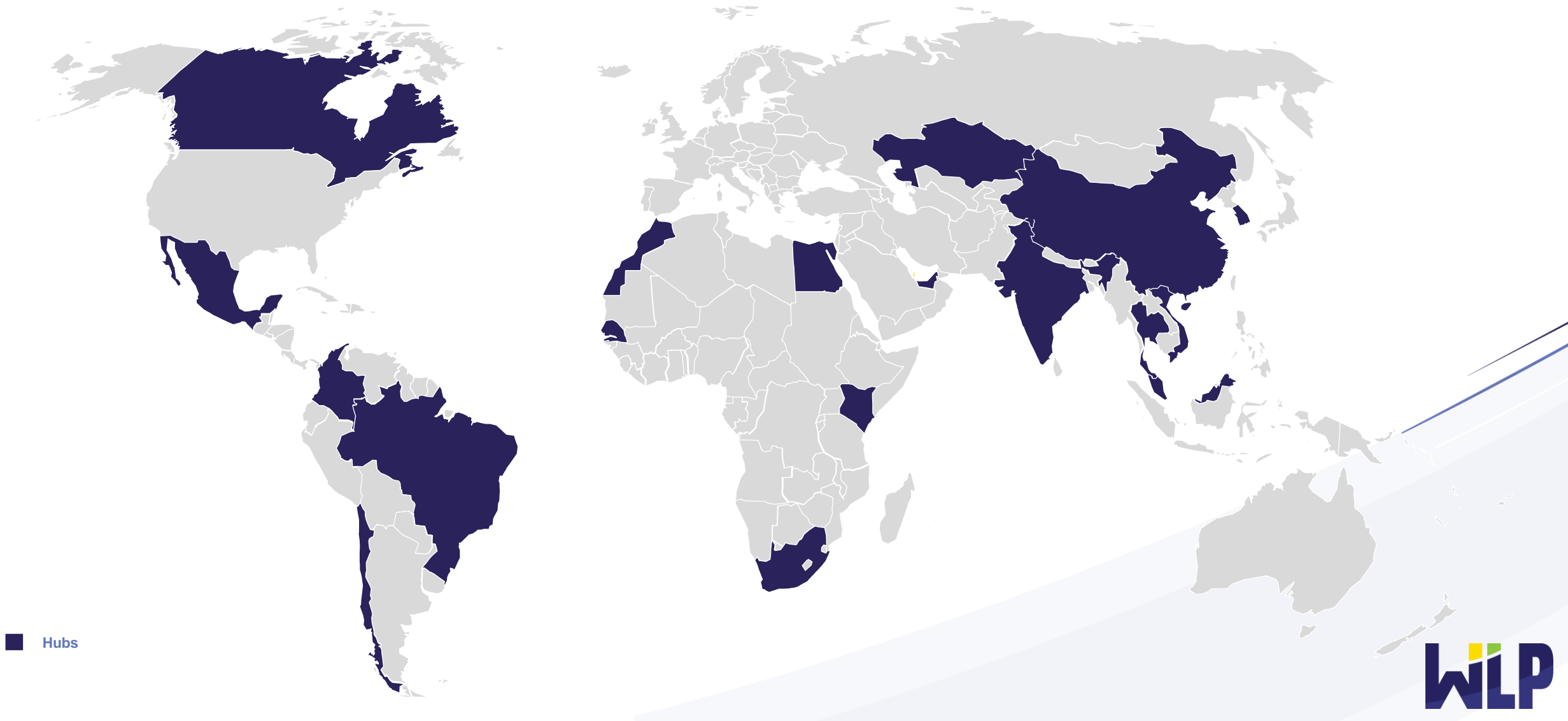
CONTAINER FREIGHT COSTS

Cost to transport one container in Africa is 2–3x more expensive than global average. Land-locked countries transport costs represent on average 45% of value of imports and 35% of exports – higher than global averages of 5.4% (of imports) and 8.8% (of exports)



Source: DP World, Imperial Data and reports

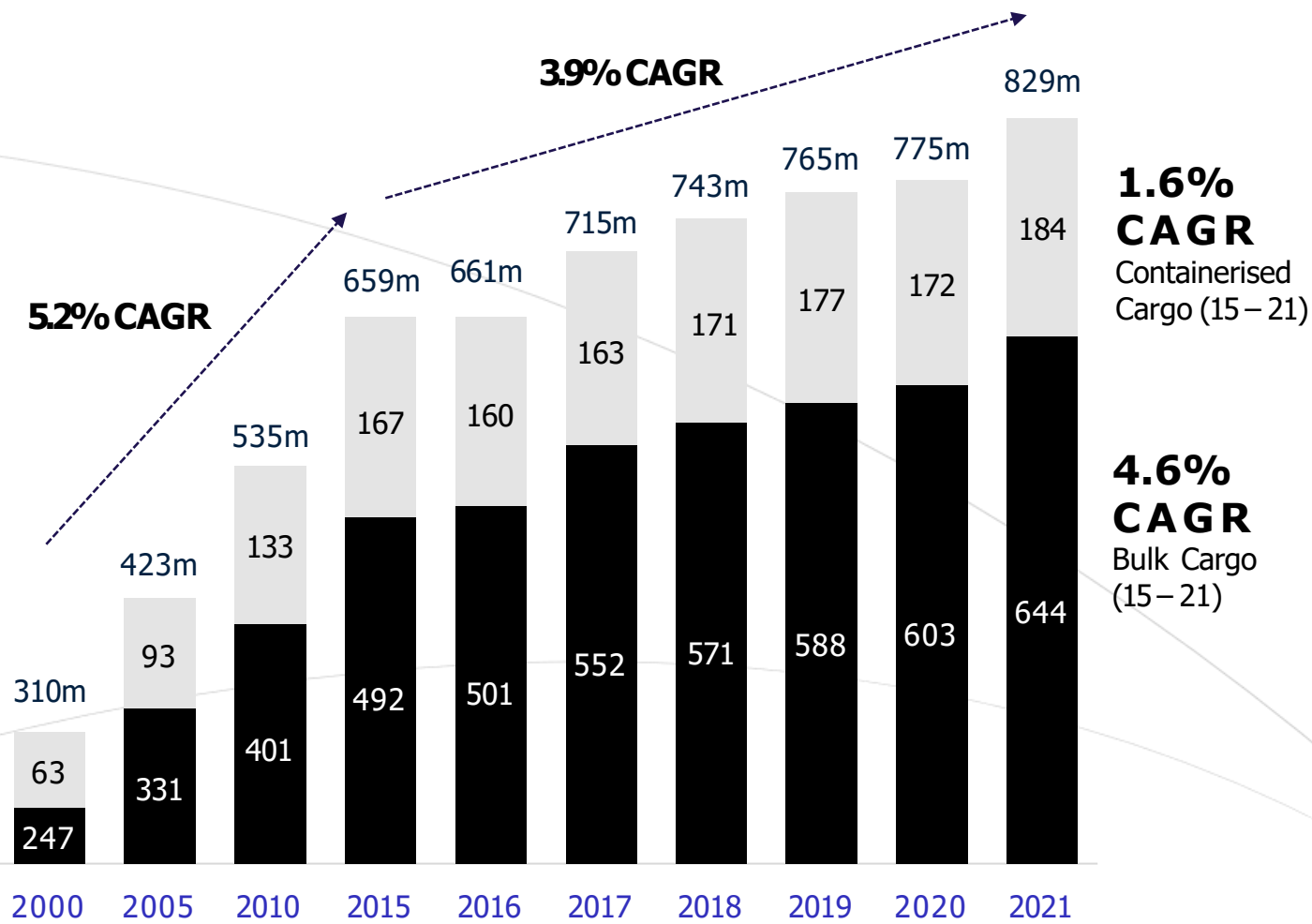
Cross border World Logistics Passport – Network



CROSS-BORDER TRADE GROWING IN AFRICA

Total Trade by region (Million tons, Excluding liquids)		%Share of Global trade	2000 – 2021 CAGR
15 114m Tons		100%	4.8%
Asia	7 552	50%	6.4%
Americas	2 566	17%	2.6%
Europe	1 834	12%	2.5%
Australasia	1 759	12%	6.2%
Africa	829	5%	4.8%
Middle East	574	4%	5.5%

Africa Trade by Segment
(Ocean Million Tons, Excluding Oil and Fuel)



*Source: Seabury
Note: 1 TEU = c.24 tons

The AfCFTA is projected to increase intra-African trade demand by 28%



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