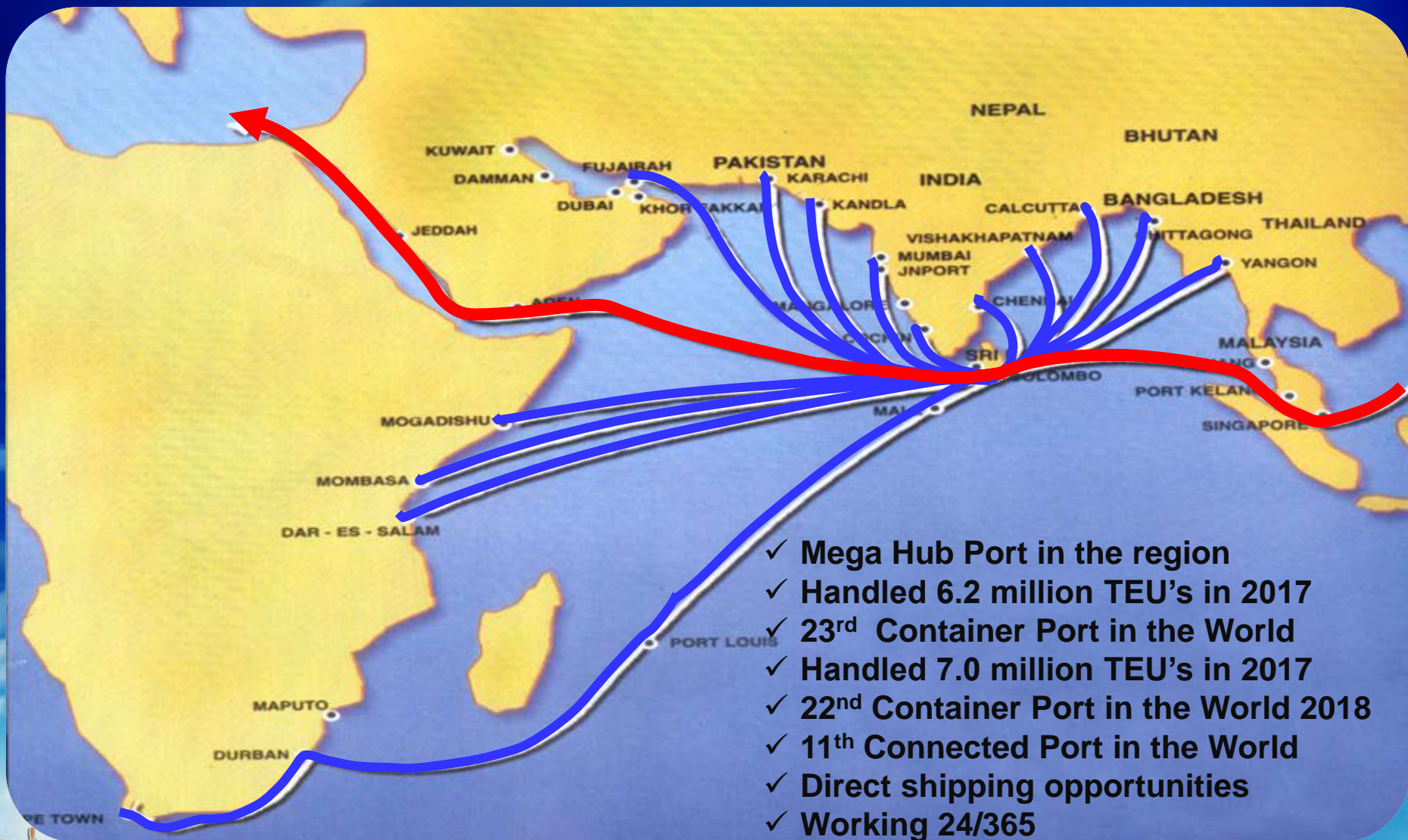


Port of Colombo & Trincomalee – Way Forward



Port of Colombo



Port of Colombo is the world highest container growth port among the top 30 for 2018 – Alphaliner Analysis

Rank	Port	FY 2018 TEU	Growth % 18/17	3Q 2018 TEU	Growth % 3Q 18 vs 17	1H 2018 TEU	Growth % 1H 18 vs 17	1Q 2018 TEU	Growth % 1Q18 vs 17
1 (1)	Shanghai	42,009,800	4.4%	31,355,800	4.9%	20,506,800	4.6%	9,739,800	4.1%
2 (2)	Singapore	36,599,277	8.7%	27,300,159	10.2%	18,021,268	11.6%	8,864,624	16.5%
3 (4)	Ningbo-Zhoushan	26,351,100	7.1%	20,135,400	7.3%	13,311,800	7.5%	6,493,500	10.4%
4 (3)	Shenzhen	25,735,900	2.1%	19,116,100	0.9%	12,075,500	1.9%	5,971,100	6.4%
5 (7)	Guangzhou	21,920,000	7.6%	15,955,700	7.5%	10,543,400	8.4%	4,933,500	9.7%
6 (6)	Busan	21,662,572	5.7%	16,101,139	4.9%	10,636,874	4.3%	5,121,215	4.6%
7 (5)	Hong Kong	19,596,000	-5.7%	14,663,000	-5.7%	9,868,000	-3.7%	4,888,000	0.2%
8 (8)	Qingdao	19,301,400	5.5%	14,346,000	4.5%	9,381,200	3.2%	4,545,600	0.7%
9 (9)	LA/LB	17,549,775	3.9%	12,792,740	2.7%	8,262,066	4.1%	4,006,532	4.7%
10 (11)	Tianjin	16,006,900	6.2%	12,115,300	5.7%	7,807,600	5.2%	3,601,400	7.5%
11 (10)	Dubai	14,954,000	-2.7%	11,339,000	-2.1%	7,738,000	0.2%	3,826,000	3.0%
12 (12)	Rotterdam	14,512,661	5.7%	10,780,204	5.7%	7,077,406	6.2%	3,470,596	6.1%
13 (13)	Port Kelang	12,316,003	2.8%	9,026,072	-0.2%	5,874,912	-5.7%	2,933,038	-9.1%
14 (14)	Antwerp	11,100,408	6.2%	8,333,523	6.9%	5,567,905	8.3%	2,744,226	10.7%
15 (15)	Xiamen	10,702,300	3.1%	8,008,400	5.2%	5,165,600	7.6%	2,491,700	11.6%
16 (16)	Kaohsiung	10,445,726	1.7%	7,777,959	1.3%	5,183,803	0.1%	2,561,424	-2.1%
17 (17)	Dalian	9,767,000	0.6%	7,639,900	0.3%	4,815,400	0.4%	2,214,300	0.6%
18 (18)	Hamburg	8,770,000	-1.0%	6,620,000	-2.4%	4,355,000	-2.7%	2,160,137	-2.8%
19 (19)	Tanjung Pelepas	8,960,865	7.0%	6,590,804	5.4%	4,382,002	5.8%	2,183,927	7.4%
20 (20)	Laem Chabang	8,074,591	3.7%	5,992,107	4.0%	3,946,211	4.9%	1,948,119	5.1%
21 (21)	NY/NJ	7,179,792	7.0%	5,327,814	6.3%	3,450,469	6.8%	1,680,361	9.6%
22 (23)	Colombo	7,047,486	13.5%	5,223,292	14.9%	3,415,298	15.6%	1,706,359	16.2%
23 (24)	Jakarta	6,900,559	13.5%	4,933,850	12.7%	3,201,136	10.6%	1,633,683	6.9%
24 (22)	Yingkou	6,480,000	3.3%	4,775,800	2.8%	3,120,100	1.6%	1,556,700	1.1%
25 (25)	Ho Chi Minh City	6,332,265	6.8%	4,683,819	6.3%	3,110,070	7.1%	1,473,575	7.5%
26 (26)	Bremerhaven	5,483,222	-0.6%	4,112,158	1.9%	2,721,111	0.7%	1,345,482	-3.2%
27 (27)	Tokyo	5,110,000	1.2%	3,761,349	0.8%	2,502,781	2.0%	1,234,216	4.7%
28 (28)	Valencia	5,103,761	5.6%	3,795,960	4.5%	2,498,384	6.4%	1,183,187	8.1%
29 (29)	Manila	5,052,223	4.7%	3,746,872	5.9%	2,460,164	13.1%	1,197,367	7.0%
30 (30)	Nhava Sheva	5,051,805	7.2%	3,759,573	6.8%	2,482,050	6.9%	1,241,023	11.0%

Top 30 Container Ports – 2019 1st Quarter Analysis (9th Place) – Alphaliner

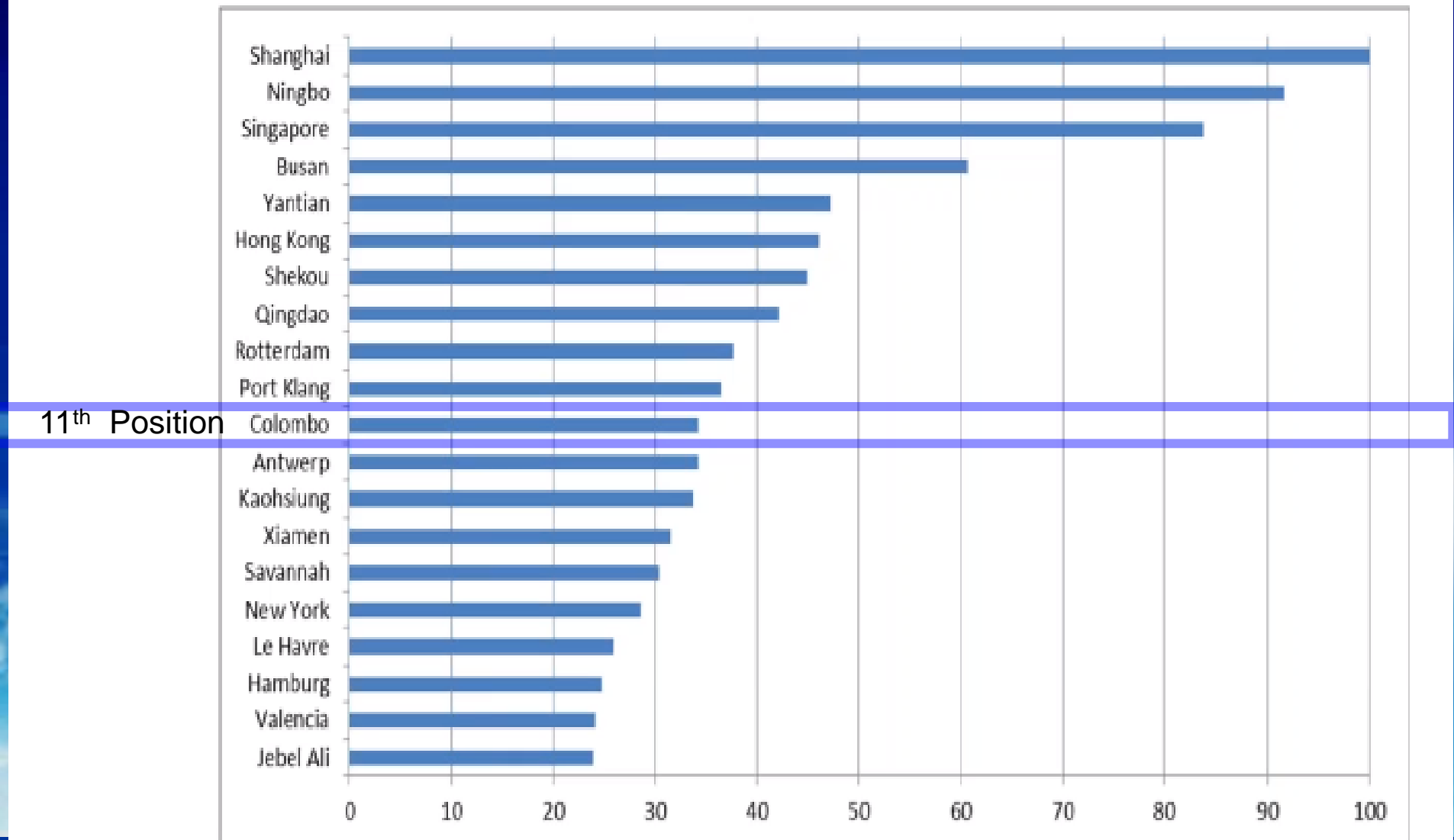
Rank	Port	1Q 2019 TEU	Growth % 1Q19 vs 18	FY 2018 TEU	Growth % 18/17	1H 2018 TEU	Growth % 1H 18 vs 17	1Q 2018 TEU	Growth % 1Q18 vs 17
1 (1)	Shanghai	10,412,000	6.9%	42,010,200	4.4%	20,506,800	4.6%	9,739,800	4.1%
2 (2)	Singapore	8,903,544	0.4%	36,599,281	8.7%	18,021,268	11.6%	8,864,626	16.5%
3 (4)	Ningbo-Zhoushan	6,696,000	3.1%	26,350,800	7.1%	13,311,800	7.5%	6,493,500	10.4%
4 (3)	Shenzhen	6,061,700	1.5%	25,735,900	2.1%	12,075,500	1.9%	5,971,100	6.4%
5 (6)	Busan	5,343,195	4.3%	21,662,572	7.6%	10,543,400	8.4%	5,121,215	9.7%
6 (7)	Guangzhou	5,280,000	7.0%	21,622,700	7.2%	10,636,874	4.3%	4,933,500	4.6%
7 (5)	Hong Kong	4,438,000	-9.2%	19,596,000	-5.7%	9,868,000	-3.7%	4,888,000	0.2%
8 (8)	Qingdao	4,938,000	8.6%	19,315,400	5.5%	9,381,200	3.2%	4,545,600	0.7%
9 (9)	LA/LB	4,015,456	0.2%	17,549,775	3.9%	8,262,066	4.1%	4,006,532	4.7%
10 (11)	Tianjin	3,779,900	5.0%	16,006,900	6.2%	7,807,600	5.2%	3,601,500	7.5%
11 (10)	Dubai	3,491,000	-8.8%	14,954,116	-2.7%	7,738,000	0.2%	3,826,000	3.0%
12 (12)	Rotterdam	3,723,950	7.3%	14,512,661	5.7%	7,077,406	6.2%	3,470,596	6.1%
13 (13)	Port Kelang	3,195,800	9.0%	12,316,003	2.8%	5,874,912	-5.7%	2,933,097	-9.1%
14 (14)	Antwerp	2,762,353	0.6%	11,100,408	6.2%	5,567,905	8.3%	2,744,226	10.7%
15 (15)	Xiamen	2,690,000	8.0%	10,702,300	3.1%	5,165,600	7.6%	2,491,700	11.6%
16 (16)	Kaohsiung	2,562,257	0.0%	10,445,726	1.7%	5,183,803	0.1%	2,561,424	-2.1%
17 (17)	Dalian	2,110,000	-4.6%	9,767,380	0.6%	4,815,400	0.4%	2,211,300	0.6%
18 (19)	Tanjung Pelepas	2,219,127	1.6%	8,960,865	7.0%	4,382,002	5.8%	2,183,927	7.4%
19 (18)	Hamburg			8,770,000	-1.0%	4,355,000	-2.7%	2,160,137	-2.8%
20 (20)	Laem Chabang	2,022,349	3.8%	8,074,591	3.7%	3,946,211	4.9%	1,948,119	5.1%
21 (21)	NY/NJ	1,792,845	6.7%	7,179,792	7.0%	3,450,469	6.8%	1,680,361	9.6%
22 (23)	Colombo	1,790,748	4.9%	7,047,486	13.5%	3,415,298	15.6%	1,706,359	16.2%
23 (24)	Jakarta			6,900,559	13.5%	3,201,136	10.6%	1,633,683	6.9%
24 (22)	Yingkou	1,398,000	-10.2%	6,487,360	3.3%	3,120,100	1.6%	1,556,700	1.1%
25 (25)	Ho Chi Minh City	1,559,986	5.7%	6,332,265	6.8%	3,110,070	7.1%	1,476,250	7.7%
26 (26)	Bremerhaven	1,241,690	-7.7%	5,483,222	-0.6%	2,721,111	0.7%	1,345,482	-3.2%
27 (27)	Tokyo			5,106,623	1.2%	2,502,781	2.0%	1,234,216	4.7%
28 (28)	Valencia	1,355,026	12.9%	5,103,761	5.6%	2,498,384	6.4%	1,183,187	8.1%
29 (29)	Manila	1,276,279	6.6%	5,052,223	4.7%	2,460,164	13.1%	1,197,367	7.0%
30 (30)	Nhava Sheva	1,322,489	6.6%	5,051,805	7.2%	2,482,050	6.9%	1,241,023	11.0%

BEST CONNECTED COUNTRIES PER REGION



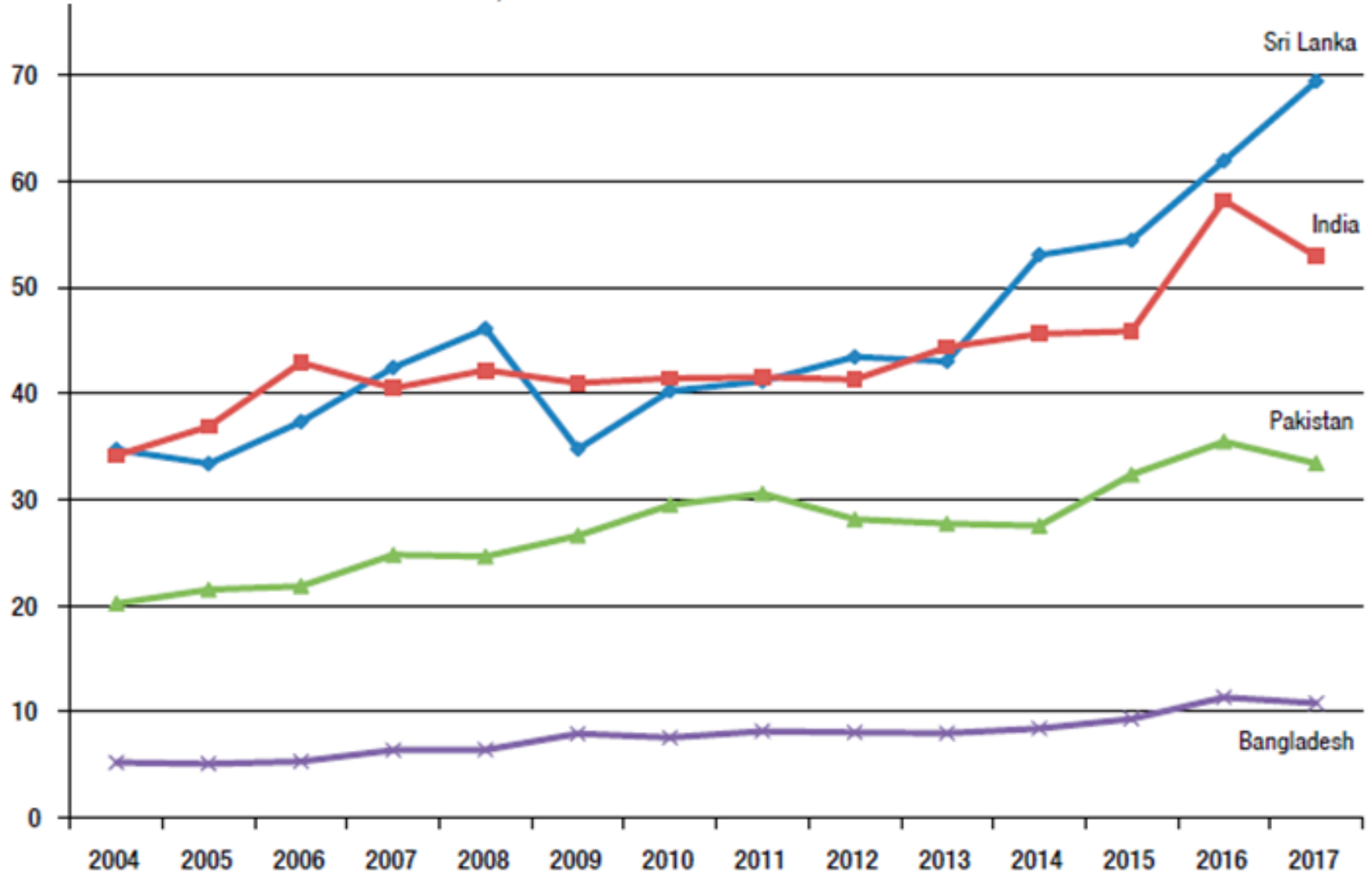
Port connectivity index

Global container port connectivity index score, 3Q18 (Top 20 ports)

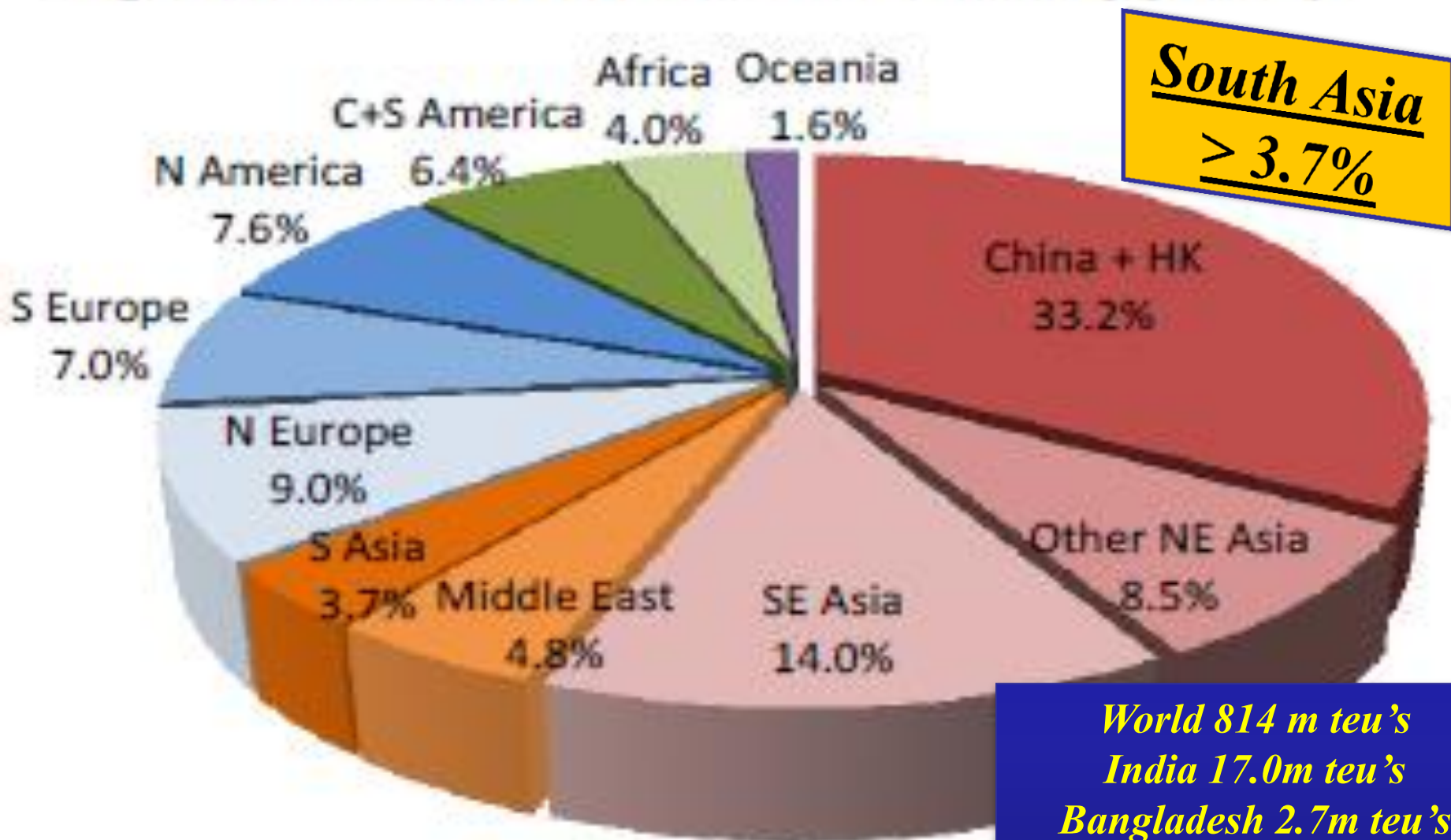


Liner Shipping connectivity index, 2004 - 2017

UNCTAD *Review of Maritime Transport*



Regional Share of Global Container Activity (2018F)



World 814 m teu's
India 17.0m teu's
Bangladesh 2.7m teu's
Pakistan 3.5m
Colombo – 7.0m teus

Regional Share of Global Container Activity (2018F)

Million TEU by Region	2012	2013	2014	2015	2016	2017	2018F	Annual Growth		
								2016	2017	2018F
China & HK	200.6	212.6	224.7	231.6	239.9	259.2	270.6	3.6%	8.0%	4.4%
Other NE Asia	58.7	60.3	63.0	62.6	63.7	66.7	69.2	1.8%	4.7%	3.8%
SE Asia	89.1	91.8	97.4	97.3	100.8	106.4	114.0	3.5%	5.6%	7.1%
Middle East	35.4	35.2	37.0	38.3	39.3	39.9	39.3	2.4%	1.5%	-1.3%
S Asia	17.9	18.8	21.1	22.4	24.7	27.6	30.4	10.4%	11.8%	10.0%
N Europe	62.8	63.9	67.3	65.9	67.5	71.1	73.6	2.4%	5.4%	3.5%
S Europe	44.9	46.6	48.2	47.8	50.6	54.0	57.3	5.9%	6.8%	6.0%
N America	49.0	50.0	52.0	54.2	54.7	59.1	62.2	0.9%	8.0%	5.3%
C+S America	45.3	45.7	46.4	47.2	46.4	49.8	51.9	-1.8%	7.4%	4.3%
Africa	26.7	29.6	30.6	30.1	29.2	30.9	32.5	-3.0%	6.1%	5.0%
Oceania	10.7	10.9	11.3	11.6	11.9	12.7	13.3	2.0%	6.6%	5.2%
Total	641.0	665.3	699.0	709.0	728.3	777.2	814.2	2.7%	6.7%	4.8%
Growth (YoY)	4.7%	3.8%	5.1%	1.4%	2.7%	6.7%	4.8%			



Port of Colombo – Two Harbours



Facilities at the Port of Colombo – 6.0m teu's

Unity Container
Terminal (UCT)

Jaya Container
Terminal (JCT)

South Asia Gateway
Terminal (SAGT)



Port of Colombo



PORT OF COLOMBO

MARITIME MEGA HUB OF SOUTH ASIA



www.slpa.lk

FRIENDLY & ACCOMMODATING TERMINAL

- 1,292m main & 350m feeder berth
- 15m & 12m alongside depth
- 23 Quay Cranes
- 71 Rail and Rubber Gantry Cranes
- 10,000 ground slots



GAIN THE ADVANTAGE WITH SAGT

Operational efficiency; Proof of concept

- Average 34 MPH/Crane
- 1,000 moves vessel in 10hrs
- Average truck turn time 13mins
- Ease of doing business
- Collaborating customer solutions



www.sagt.com.lk



www.cict.lk

- Three Terminals
- 8.5million TEU Capacity
- 14 Berths
- 49 Gantry Cranes
- 150 RTG's
- 4 RMG's
- Joint Inter-terminal trucking

DEEP WATER TERMINAL OF CHOICE

Managed by CMHI; Winner of "Terminal Operator of the Year 2015"

- 1,200m of linear berth
- 18m alongside depth
- 12 twin lift Quay Cranes (70m outreach)
- Common user facility with global port network

Colombo Port Expansion Project (CPEP)

Colombo South Harbour – 8.5m teu's

Phase 1

Breakwater – 6.8km
Three Container Terminals

Navigational Data

Channel depth 20m
Basin depth 18m / Area 285ha
Two way - channel & entrance

South Terminal - CICT

Three berths
1,200m Quay
Land area of 58ha
Annual Capacity – 2.4m TEU'S
Terminal cost - \$ 500 m
PPP / BOT
China Merchant 85% + SLPA 15%
Fully Operational

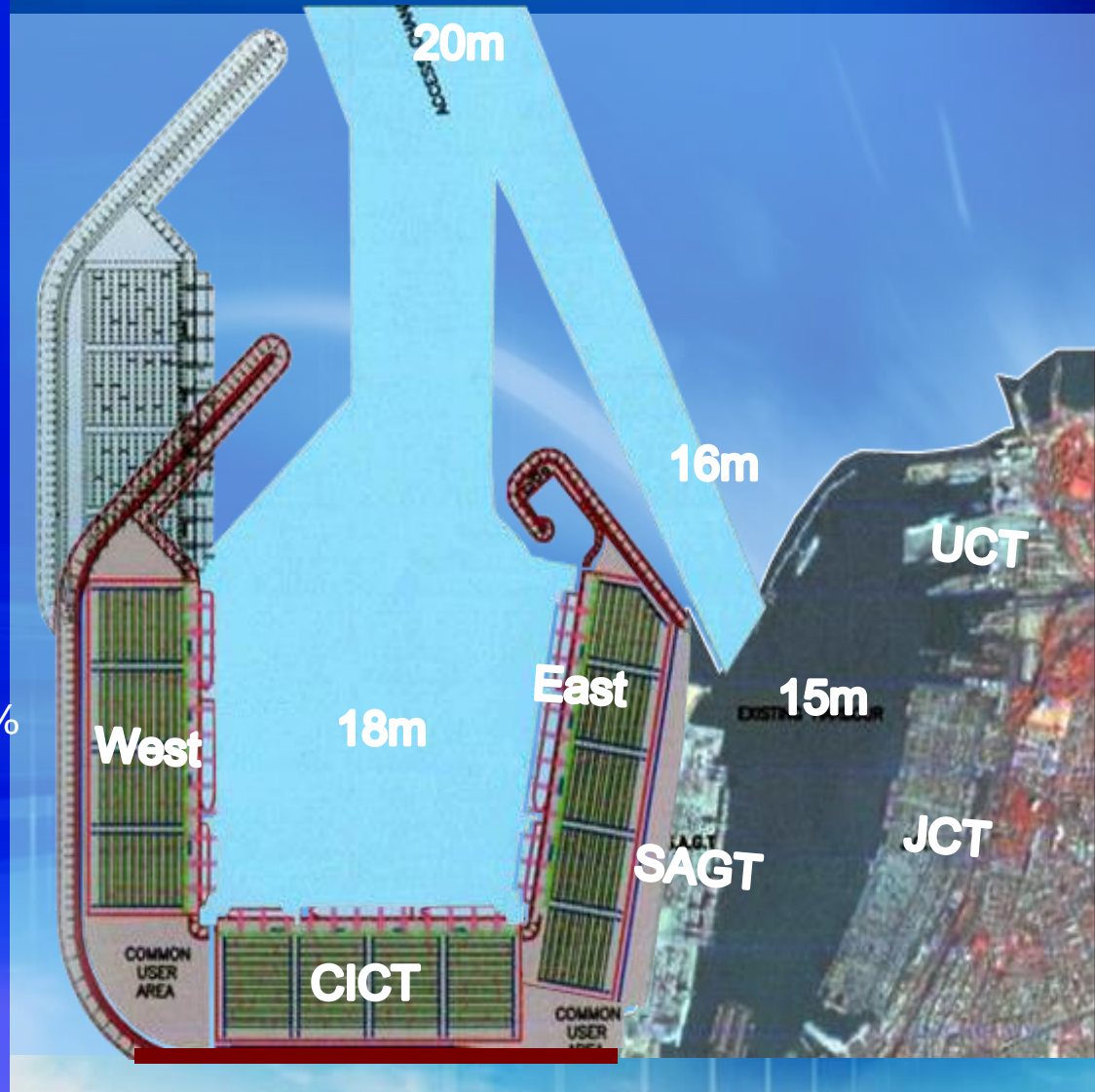
East Terminal

Three berths
1,200m Quay
440m operational by 2020

Phase 2

Extension of break water
One Container Terminal

Sri Lanka Ports Authority



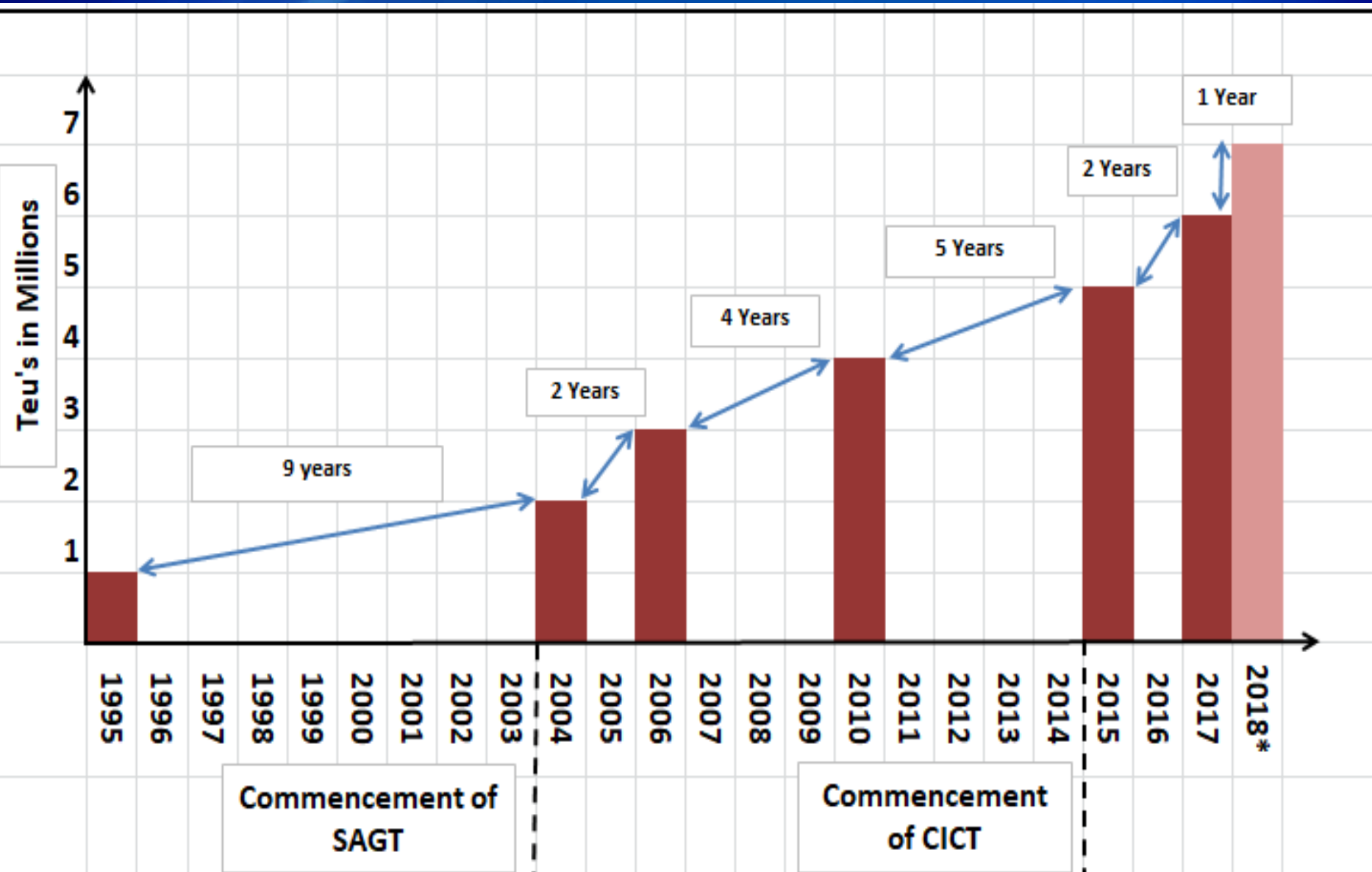
Colombo South Harbour 1st Terminal – CICT

Colombo International Container Terminal – > 20,000tues



- ✓ 18.0m depth & 17.25m draft
- ✓ Three berths 1,200m
- ✓ PPP + BOT – China Merchants Port

Relationship between throughput & capacity – Port of Colombo



Colombo South Harbour - 2nd Terminal

ECT - East Container Terminal



- ✓ 18.0m depth & 17.25m draft
- ✓ Three berths , 1,350m
- ✓ 440m one berth ready for operation

PORT OF COLOMBO – Long Term Plan

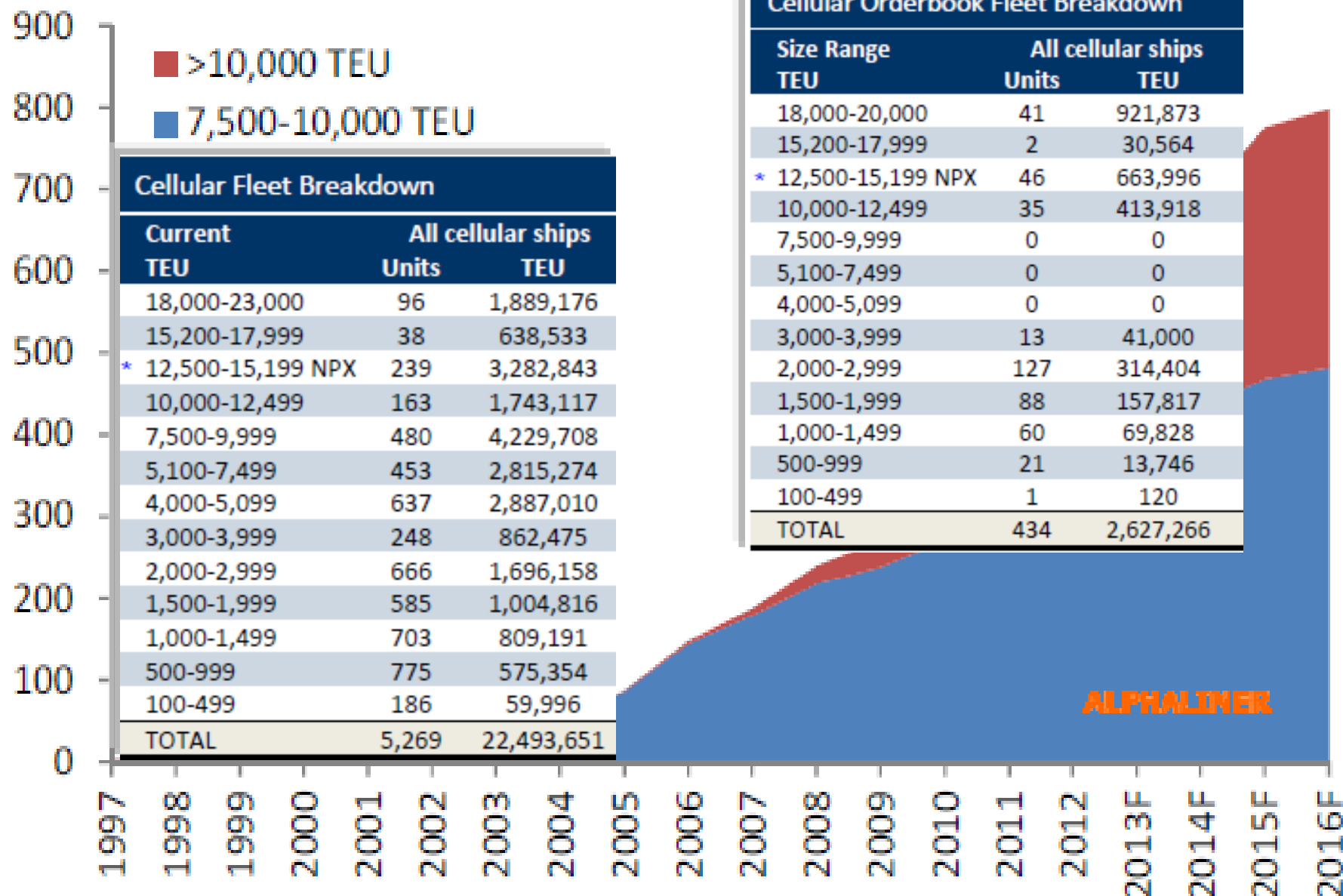


The world's largest containerships

		Nominal TEU tdw	LOA m	Breath m	Depth m	Draft m
MSC GÜLSÜN 6 units in series from July 2019		22,960 teu 228,149 tdw	399.9	61.5	33.2	16.5 Operated by MSC Built by Samsung H.I. <i>MSC also has 5 units to be built at DSME</i>
OOCL HONG KONG 6 units in series from May 2017		21,413 teu 191,317 tdw	399.9	58.8	32.5	16.0 Operated by OOCL(COSCO) Built by Samsung H.I.
COSCO SHIPPING UNIVERSE 6 units in series from Jun 2018		21,237 teu 198,485 tdw	399.9	58.6	33.5	16.0 Operated by COSCO Built by CSSC <i>COSCO also has in addition 11 units of 19,200-20,100 teu built in CSSC/CSIC/COSCO shipyards</i>
MADRID MAERSK 11 units in series from Apr 2017		20,568 teu 210,019 tdw	399.0	58.6	33.2	16.5 Operated by Maersk Built by Daewoo (DSME)
EVER GOLDEN 11 units in series from Mar 2018		20,388 teu 199,692 tdw	400.0	58.8	32.9	16.0 Operated by Evergreen Built by Imabari
MOL TRIUMPH 6 units in series from Mar 2017		20,170 teu 192,672 tdw	400.0	58.8	32.8	16.0 Operated by MOL Built by Samsung H.I.

Container Ships Operational & Order book as at April 2019

Number of ships



Prediction of Vessel Dimension using Ship Capacity (TEU)

Case	Ship Capacity (TEU)	Ship Length (m)	Ship Breadth (m)	Summer Draft (m)
1	20,000	404	59	16.4
2	21,000	410	60	16.5
3	22,000	415	62	16.6
4	23,000	421	63	16.7
5	24,000	426	64	16.8
6	25,000	431	66	16.9
7	26,000	435	67	17.0
8	27,000	440	68	17.0
9	28,000	444	70	17.1
10	29,000	449	71	17.2
11	30,000	453	72	17.3

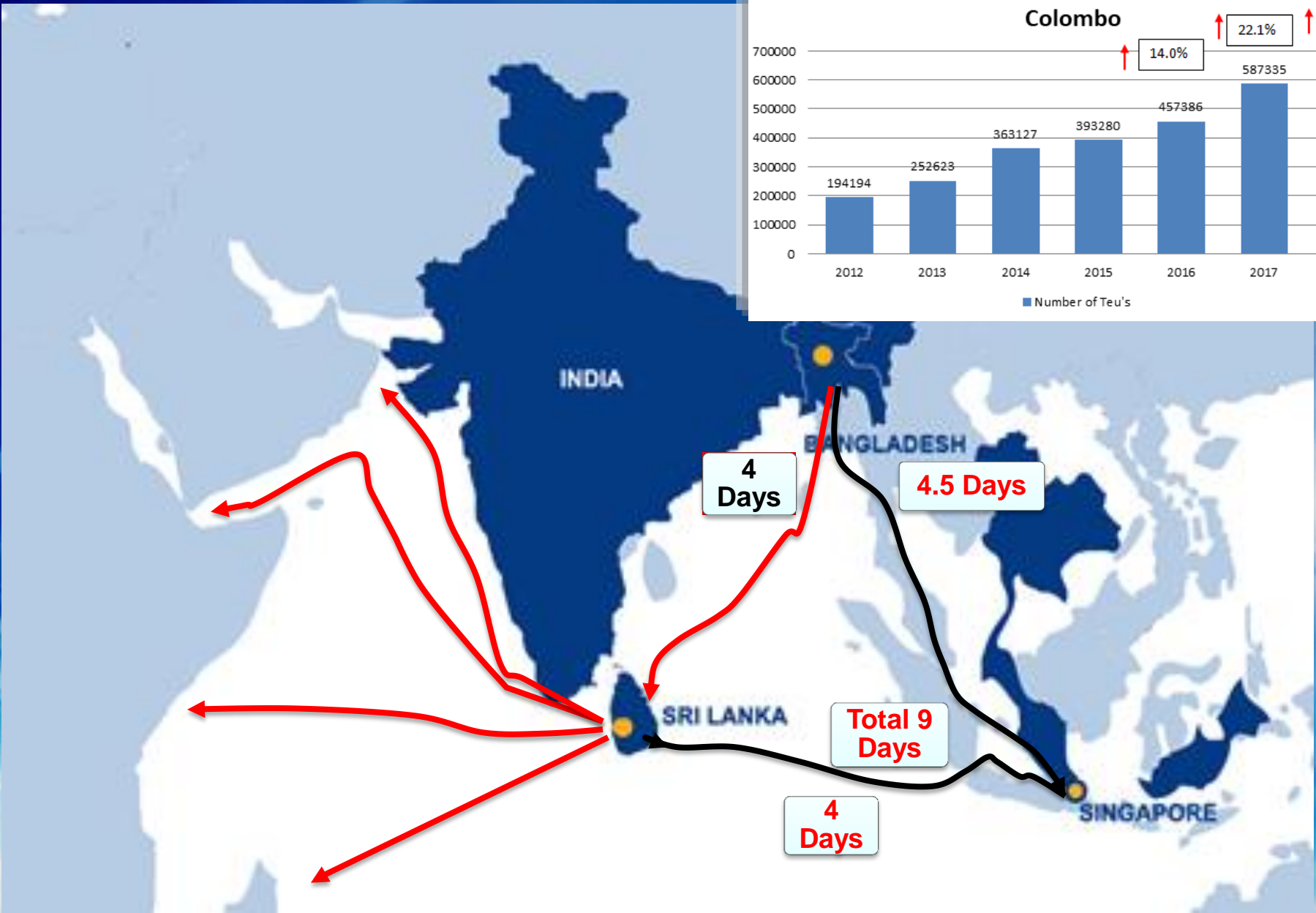
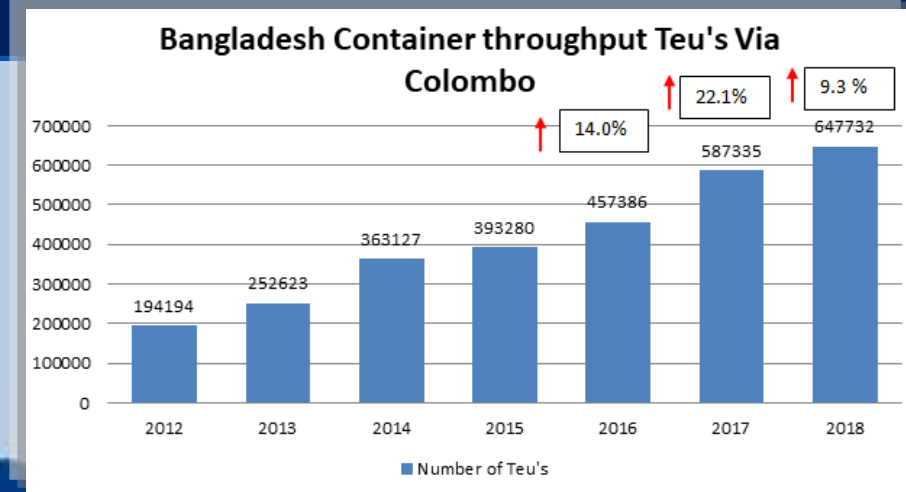


Prediction of STS Outreach by Ship Capacity (TEU)

Case	Ship Capacity (TEU)	Ship Breadth (m)	Ship Rows	Outreach (m)
1	20,000	59	23.0	67.7
2	21,000	60	24.0	69.0
3	22,000	62	24.0	70.4
4	23,000	63	25.0	71.7
5	24,000	64	25.0	73.0
6	25,000	66	26.0	74.3
7	26,000	67	26.0	75.7
8	27,000	68	27.0	77.0
9	28,000	70	27.0	78.3
10	29,000	71	28.0	79.7
11	30,000	72	28.0	81.0



Bangladesh West Bound Cargo Best Connected via Colombo



Major Priority projects in short term- Port of Colombo

Container

1. Jaya Container Terminal Modernisation
2. East Container Terminal
3. West Container Terminal

Non-container

4. (F)LNG Handling and Storage Facility
5. Passenger Terminal on BQ
6. Port Community System
7. Port Access Elevated Highway
8. North Port Development Study



Import facilitation from SLPA towards ease of doing business

- **Appointed Rent Waiver Committee to review to rent waiver request from importers.**
- **Help Desk – Online inquiry point through SLPA Website. Customer/Importer inquiry on Damage or loss of Cargo**
- **Facility for inquiry through Customer Relations Section in Logistics Division. (WIC 1& WIC 2 Procedures)**
- **Online Payment Facility for FCL Import Containers (100% Completed.)**
- **Online Payment Facility for LCL Cargo (Implemented in CFS 01 & planned to be implement in other LCL Warehouses, 30% Completed.)**
- **Import Reject - Operational Facilities for re-Export of Cargo are available in port with approval of Customs and relevant Authorities. (Re- Work Operations)**



SLPA Head Office Complex – Maritime Facilitation Centre

- **17 stories**
- **Cost US\$ 20m**
- **Location – Next to Customs Head office**
- **One stop shop / reduce traffic congestion in port**
- **Ready to be occupied by end 2021**
- **Construction commenced**
- **Coming under US \$ 360million Port Access Elevated Road Project**
- **Office space for Maritime community**



Value added Logistics Facilities Planned

- Upgrade Existing Container Freight Stations
- Multifunctional warehouse complex inside the Port
- Bluemandal multifunctional logistic facility complex



Passenger Terminal

- Warehouses 9 and 10 will be demolished to Expand the Passenger jetty
- A connecting walking path from the passenger terminal to the GOH
- Proposed taxi stand in front of Gate 1A



Priority projects in short term – Port of Trincomalee

1. Ashroff jetty expansion and service berths
2. Rail connection to Ashroff jetty
3. Oil facility expansion
4. Night navigation
5. Industrial and logistics land allocation

Longer term development:

1. Cruise terminal
2. Marina development
3. LNG berthing provision



TRINCOMALEE HARBOUR



Ashroff Jetty Expansion and service berths

Priority project and pre-feasibility project

Phase 1 (light blue):

- New quay of 300m
- New yard and rail head
- Service jetties
- Project is financially, and economically feasible



Oil Jetty Expansion

Priority project and prefeasibility project

Phase I:

- New jetty for two vessels
- Natural deep water at CD -17m to CD -18m
- Project is economically feasible



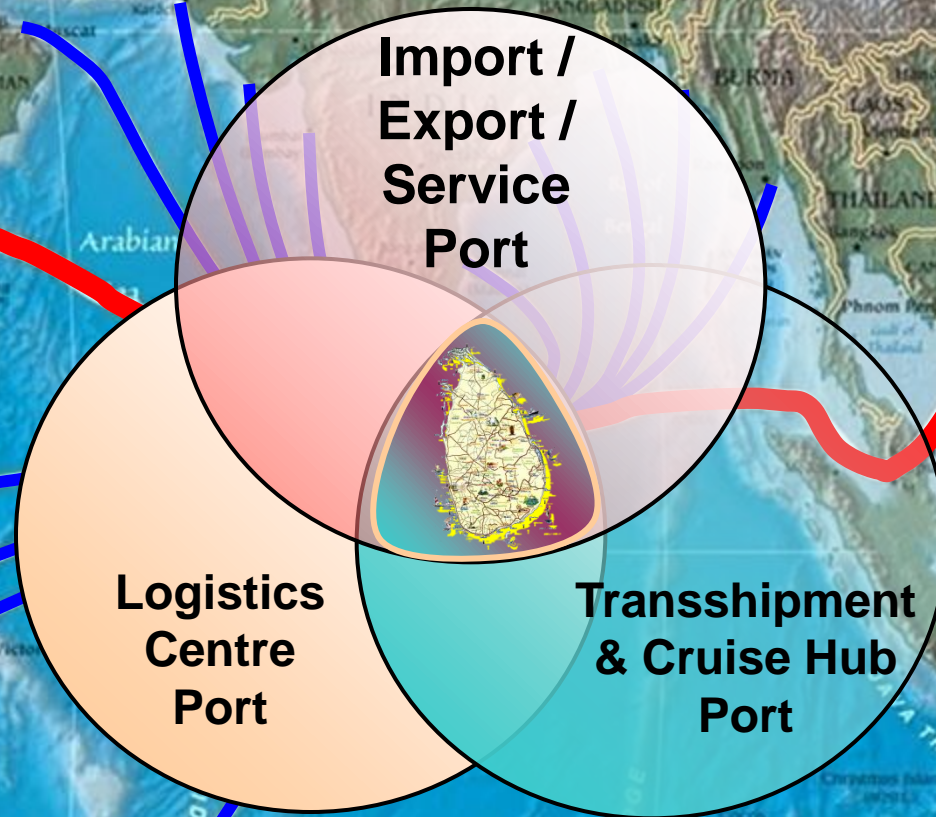
Land allocation for industry and logistics



Land plots have been identified for industrial and logistics development.



Maritime Mega Hub of South Asia



Thank You

