



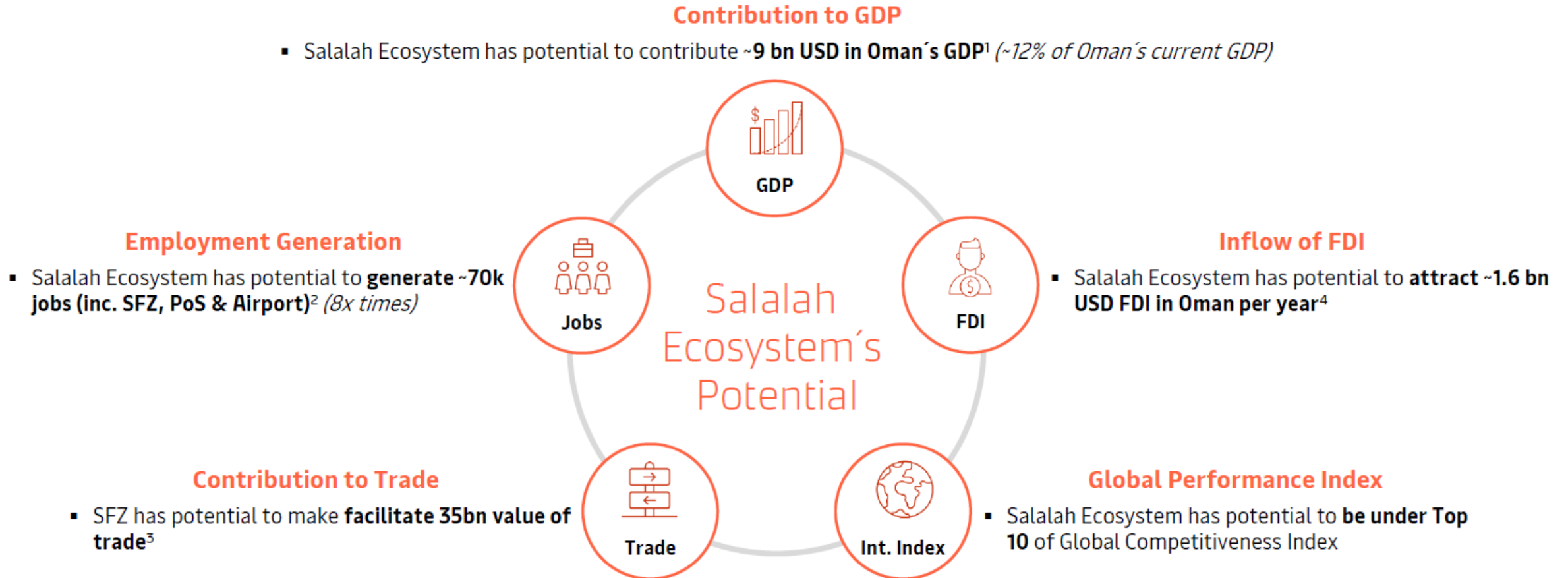
ميناء صلالة
Port of Salalah

NAVIGATING THE
FUTURE!



Unlocking Salalah's full potential could lead to contribution of ~\$9 bn in Oman's total GDP, along with ~70,000 jobs added in Dhofar

Given all the fundamentals are in place, Salalah Ecosystem can be the stimulant for Oman's vision to become dev. nation by 2040



1) Based on ASYAD study and benchmarking with per sqm contribution of JFAZA in Dubai's GDP. 2) Current jobs (SFZ:~5000, PoS:~2500, SLL Airport: ~1000). Future no. of jobs in SFZ: 63000 (based on employee per sqm comparison with JAFZA), Future no. of jobs in PoS: 3000 (based on plans of increasing capacity from 6m TEUs to 9m TEUs), Future no. of jobs in SLL Airport: 3000 (based on planned capacity increase of 6m passengers from existing 2m passengers in a year). 3) Based on benchmarking with per sqm contribution of Jafza. 4) Based on benchmarking with per sqm FDI investment in JAFZA.



ميناء صلالة
Port of Salalah

1998

Operation Start



Public listed company
Traded on Muscat
Securities Market



Largest Employer
in Dhofar
2600+ Staff

PORT OF SALALAH PROFILE



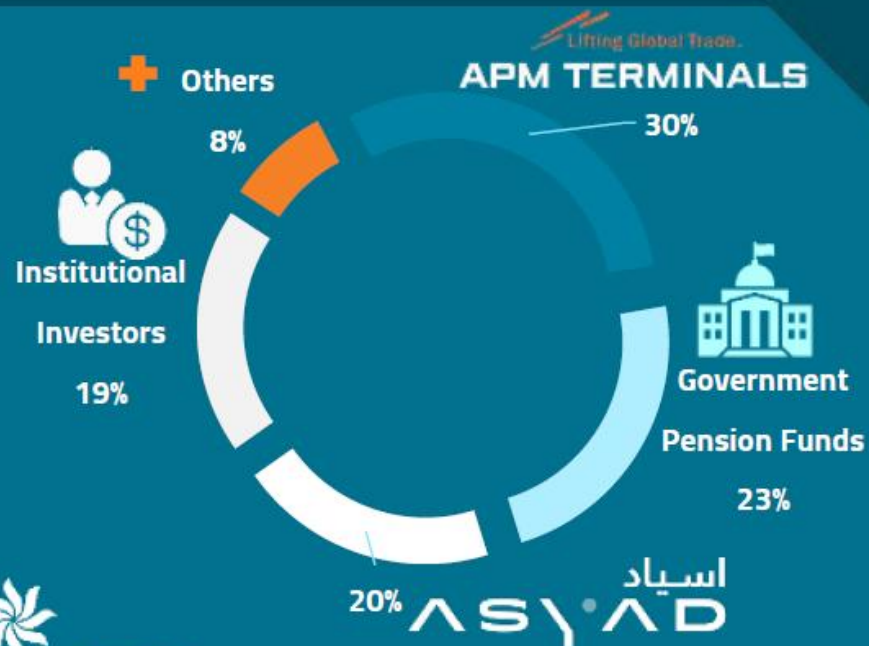
Area :
Quay length:
5,600 m



27-STS cranes
Capacity 6 m
TEU



30 years
Concession
Agreement



14 Berths in
General Cargo
Terminal



6 Berths in
Container
Terminal



@port_salalah | www.salalahport.com

Services

Stevedoring of
containers and general
cargo

Container
Maintenance and
Repair

Tug and Pilot boat
services

Bunkering\ Fueling
Vessels

Warehousing

Refrigerated sockets &
Cold storage facilities

Real estate leasing

24 hours Container
Freight Stuffing
activities CFS

Self-operators dhow
activities

Cruise vessels facilities

Liquid bulk facilities

Provision and fresh
water Facilities





recognized by key authorities
in the ports and terminal business



45

in 2023 Lloyd's List
for Top 100 Terminal



1

Largest exporter of
Gypsum

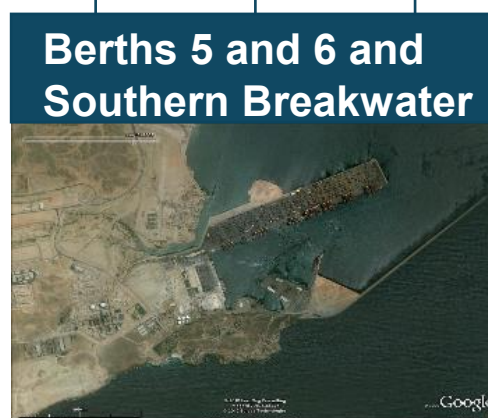
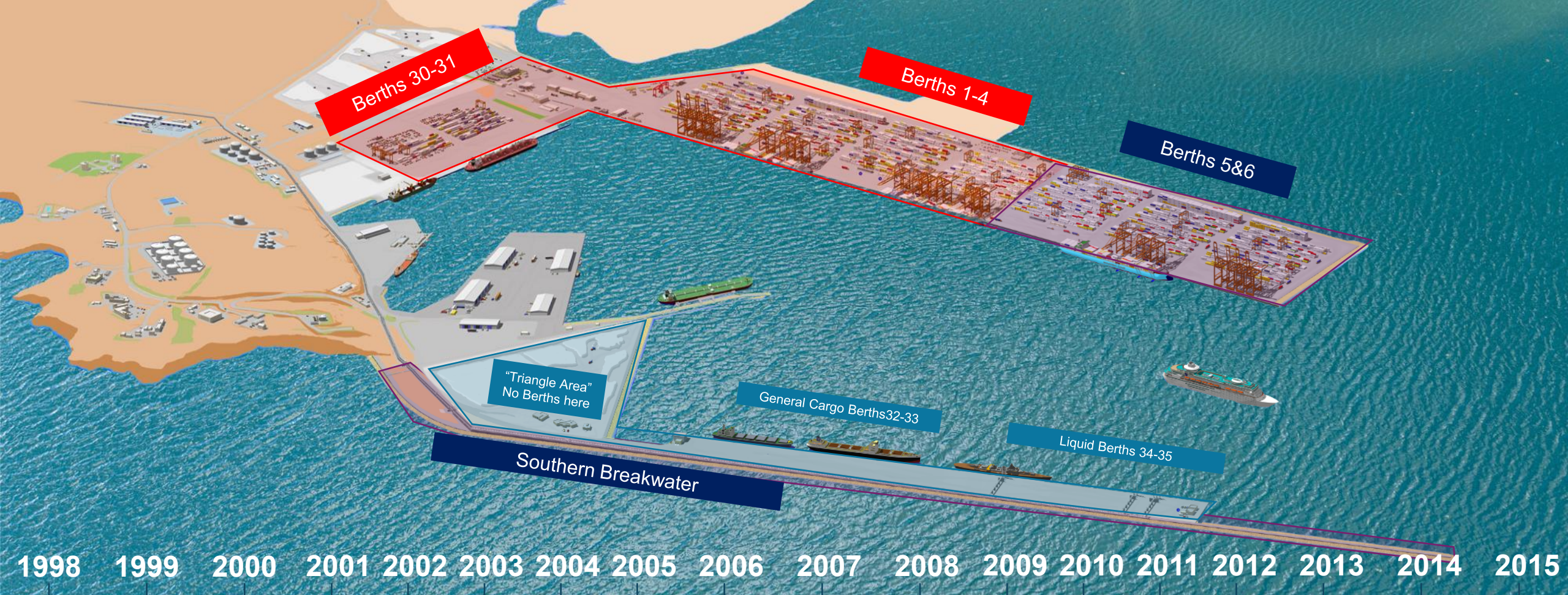


2

most efficient Terminal
out of 374
Ports Globally 2023

+ many more awards







CARGO LOCATIONS

■ Cement and Clinker B32-33

■ Bagged and Other Cargo 21-26

■ Livestock 21-26

■ Dry Bulk Limestone and Gypsum 30-31-32-33

■ Grains 33

■ Wet Bulk: Liquid Cargo 34-35 \ 30 Methanol \ Fuel Jetty

**MEETING OMAN
VISION 2040**

60% of Logistics' Sector
contribution to Oman's GDP

Largest Employer In Dhofar
more than 2K employees

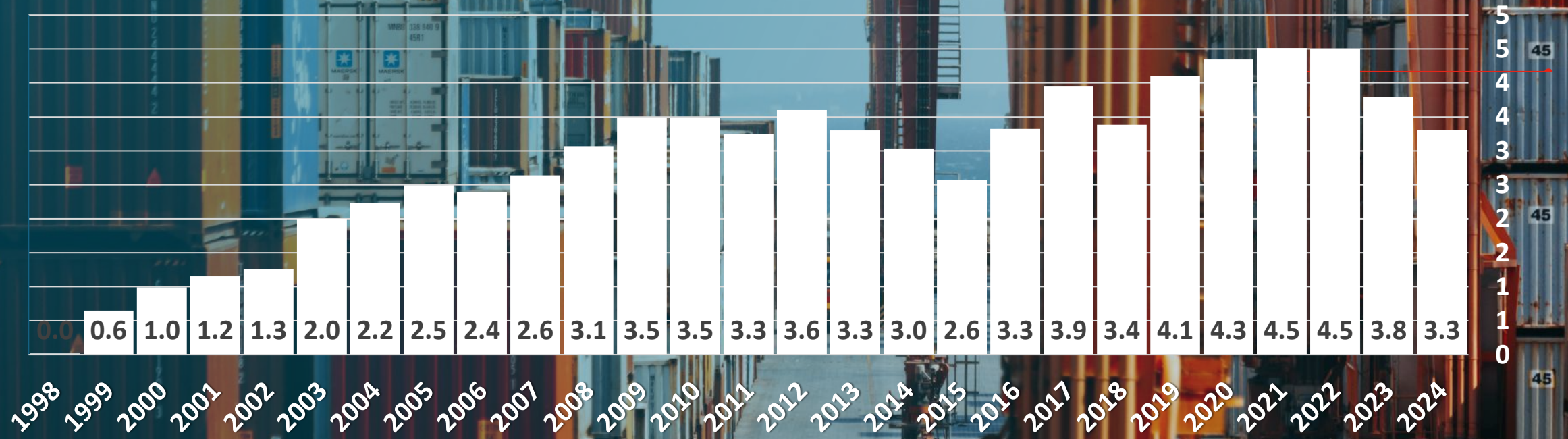
Mega projects on field :
Continued cooperation with
Salalah FreeZone



ميناء صلالة
Port of Salalah

**VISION 2040
NAVIGATING THE
FUTURE!**

Container Terminal | Growth 1998 – 2024



مليون حاوية نمطية سنويا
Million TEUs annually
Updated Q1-2023



50+ & more
Shipping Services

 **MAERSK LINE**  **MEDITERRANEAN SHIPPING COMPANY**



Hapag-Lloyd

HAMBURG



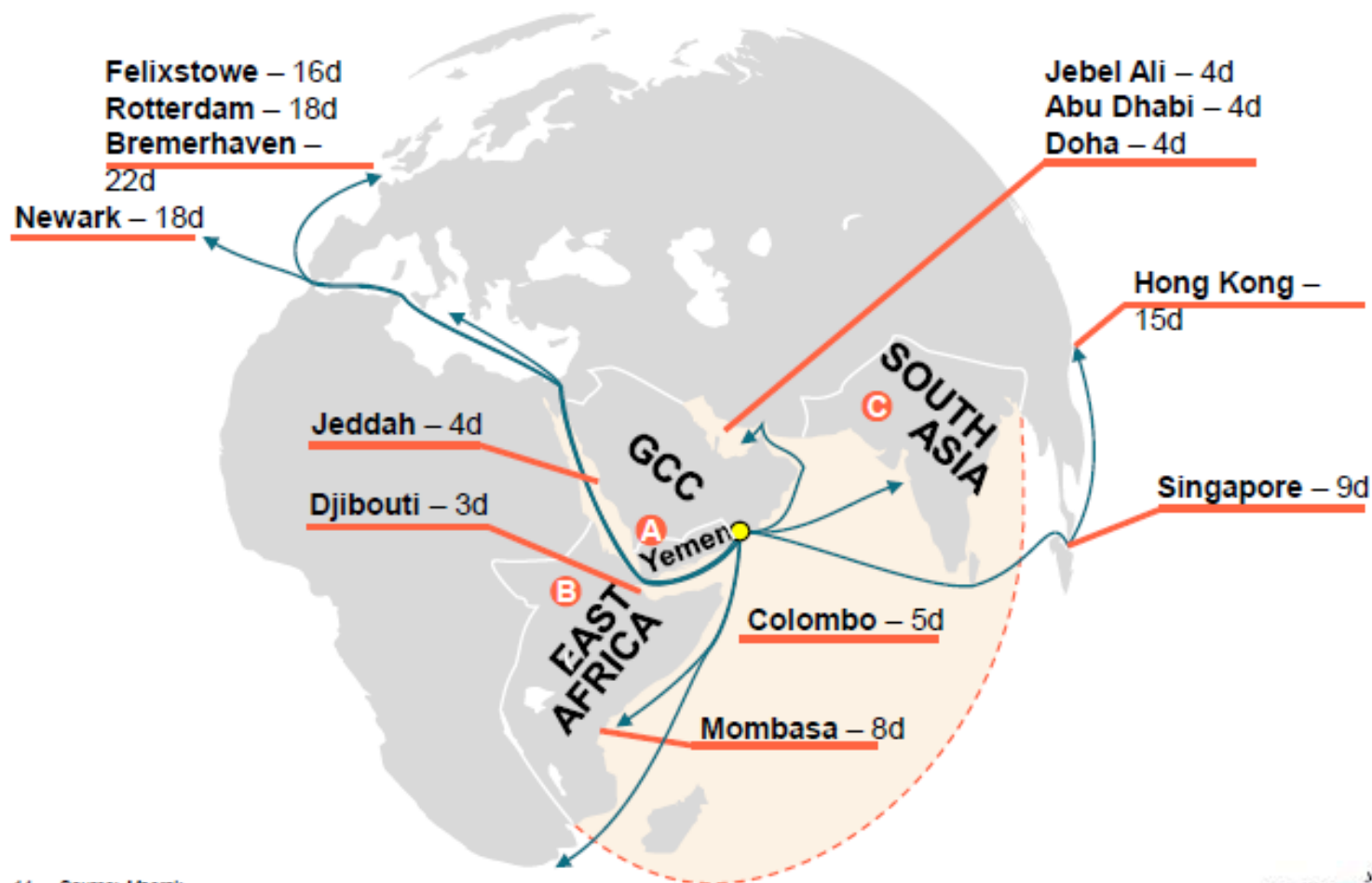
HMM
HYUNDAI MERCHANT MARINE CO., LTD.

**SALALAH HAS
THE LOWEST
TRANSPORT AND
LOGISTICS COST
(TTLC)
IN THE REGION**

QBIS 2021

Regional focus























Salalah sits in between \$2.5 trillion worth of trade flows and close to large growing markets...



- 4 days **shorter ocean time** compared to Jebel Ali, Abu Dhabi and Qatar
- High potential to become a strong **regional player in key growth markets**

- A** Yemen
- B** East Africa
- C** South Asia

Total Transport and Logistics Costs & Times, Salalah CT, export 20ft, 2021

Direct costs										Total	
	Customs Clearing Agent	Licenses & Permits	Pick up empty	Stuffing container	Inland transport	Gate in & drop off	Border clearance	Port operation	Sea transport		
	65-130	50	20-40		20-40		30-40	166		360-480 USD	
		2.1-3.0	0.9-1.5	0.6-0.7	0.6-1.0	0.5-3.0	2.0-5.5	Not included	Not Included	6.7-14.5 hours	
Indirect costs											
	Demurrage charges	Detention charges	Shutout charges	Port storage	Inventory	Penalties late delivery	Lost orders	Lost production	Spoilage	Breakage	
	5.0	5.0	2.2	10.5	0	0	0	0	0	0	23 USD
% CT	1.5%	1.5%	11%	2.0%	0	0	0	0	0	0	
No days/CT	4.5	4.5		7	0	0	0	0	0	0	
USD/day	75	75	20	75	0	0	0	0	0	0	

In Nhava Sheva, a 2019 TTLC study assessed direct costs of exporting a 40ft container to around 790 USD, indirect costs to around 479 USD, and time to export to around 69 hours.

Salalah sits amidst \$2.5 trillion worth of trade flows and boasts a politically favorable and developed environment

At the crossroads of global trade routes

1

- Located on the ocean routes connecting South and East Asia with Europe, North Africa and Americas, and the upper Gulf with East Africa
- Large connectivity through global shipping hub Port of Salalah
- Favorable climate

In a favorable political climate

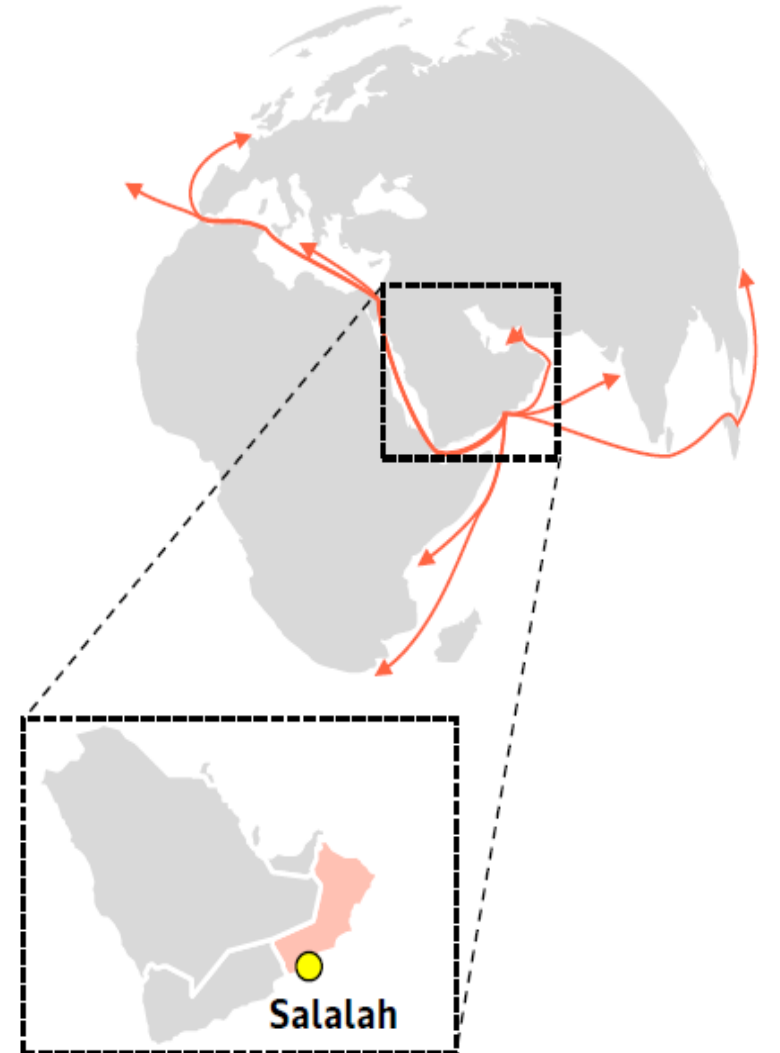
2

- Neutrality in regional conflicts makes Oman a unique starting point for countries all around the region
- Part of GCC, FTA with USA and Singapore
- Plans for extensive reforms to facilitate ease of doing business

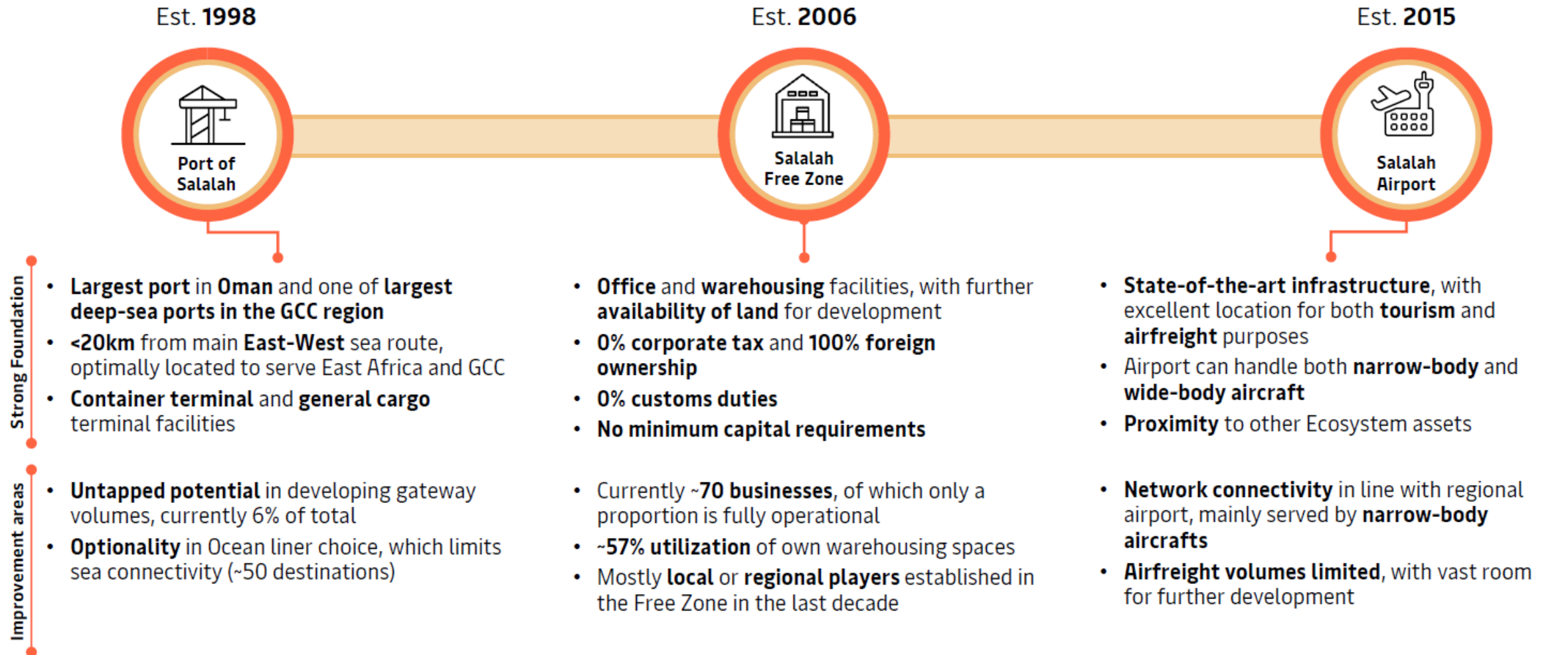
Supported by world class facilities

3

- Excellent logistics infrastructure, one of the best road networks in world
- World class sea-port, ranked 6th in Container Port Performance Index
- High-quality office and warehousing space in Salalah Free Zone, combined with tax exemptions and other regulatory benefits



The Salalah Ecosystem has a strong foundation in place, but there is still significant potential for further development



1. Overseeing authorities part of ecosystem not represented

Fixing the fundamentals will position the Ecosystem to start capturing opportunities across the three Growth Avenues

Fixing the Fundamentals



1

Regional supply chain hub

- ✓ **Seamlessly integrated** Ecosystem with **connectivity to key demand centers** across East Africa and Horn of Africa, akin to GCC peers, the Ecosystem offers **competitive rates** supported by **trade agreements facilitating growth** of key industries in relevant markets
- 📌 *Salalah offers a **compelling value proposition** to investors looking to establish **regional distribution and value-added services to EAF, competitive with GCC peers***

2

Export-oriented manufacturing cluster

- ✓ **Setting up** a business in Salalah is **quick and easy**, investors are guaranteed **competitive energy rates** into the long-run and can find **ample skilled labour** in the Ecosystem, labour regulations allows for sourcing of foreign labour wherever necessary
- 📌 *Salalah is able to **attract key manufacturing industries** prioritised by Oman's economic agenda*

3

Gateway to Yemen

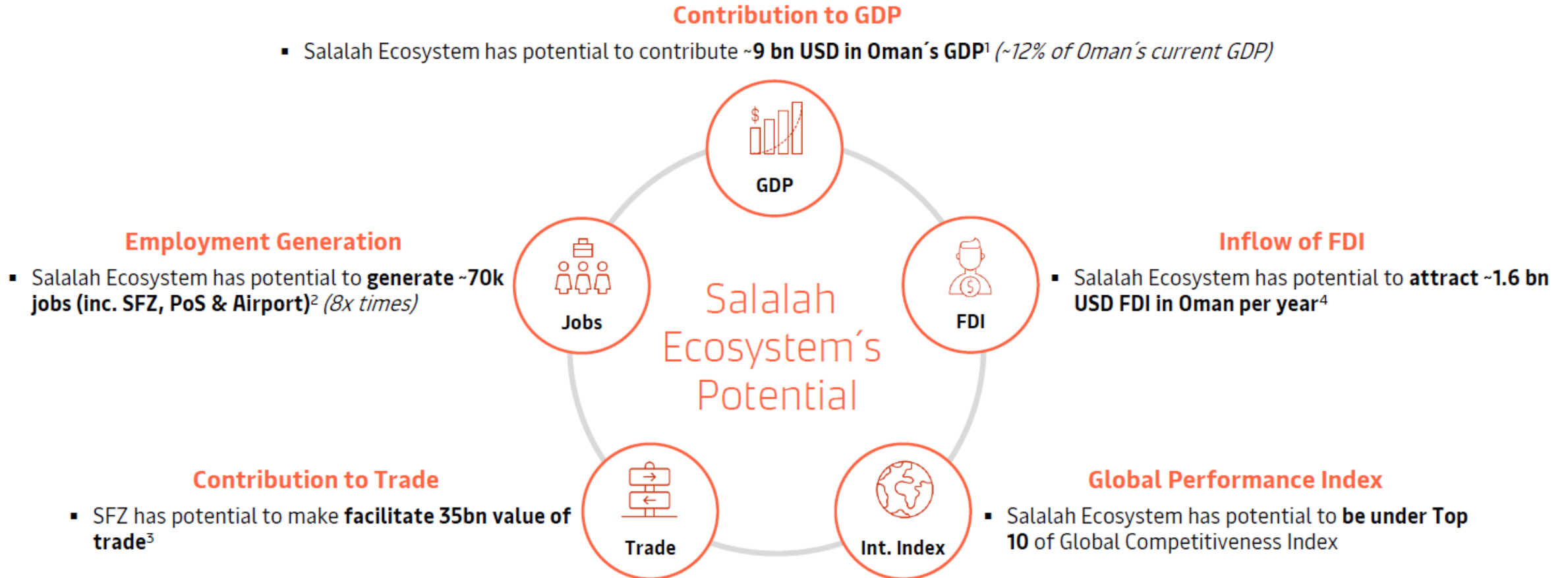
- ✓ Salalah Ecosystem offers **competitive rates** supported by **quick and easy setup** (incl. bank accounts and visas) for Yemeni investors and **facilitates smooth cross-border** cargo flows
- 📌 *Salalah becomes the **obvious choice to setup international trade with Yemen***

Objectives

- 1 A fully aligned Ecosystem across all stakeholders (Salalah Free Zone, Port of Salalah and Salalah Airport) is **Oman's national priority with consistent sector focus**, tailored incentives and targeted governmental support
- 2 Salalah Ecosystem operates as **integrated Special Economic Zone with independent legal framework** supported by business-first government regulations and transparent public-private dialogue
- 3 Salalah is **among GCC's most cost competitive Ecosystems** across all products, services and utilities
- 4 **Best-in-class infrastructure** for warehousing, utilities, roads and accommodation
- 5 One-Stop-Shop provides **quick and seamless "turnkey" customer onboarding experience**, supported by simplified approval processes and streamlined communication with authorities
- 6 **Higher sea optionality**, with transparent and competitive rates, and **increased air connectivity** and capacity, with rates in line with competitors
- 7 Quick **customer-oriented customs operations**, enabled by seamless bonded corridors, fully digitalized services and fees comparable with peers
- 8 **Mutually-beneficial partnership between Salalah Ecosystem and Ministry of Labour**, supported by harmonised requirements, facilitated access to local talents and proactive talent development

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شكرا لكم - THANK YOU

PORT OF SALALAH | PO. BOX: 369 | SALALAH - 211 | SULTANATE OF OMAN

