

Mauritius Ports Authority

Mauritius as the Preferred Regional Maritime Gateway

January 2018

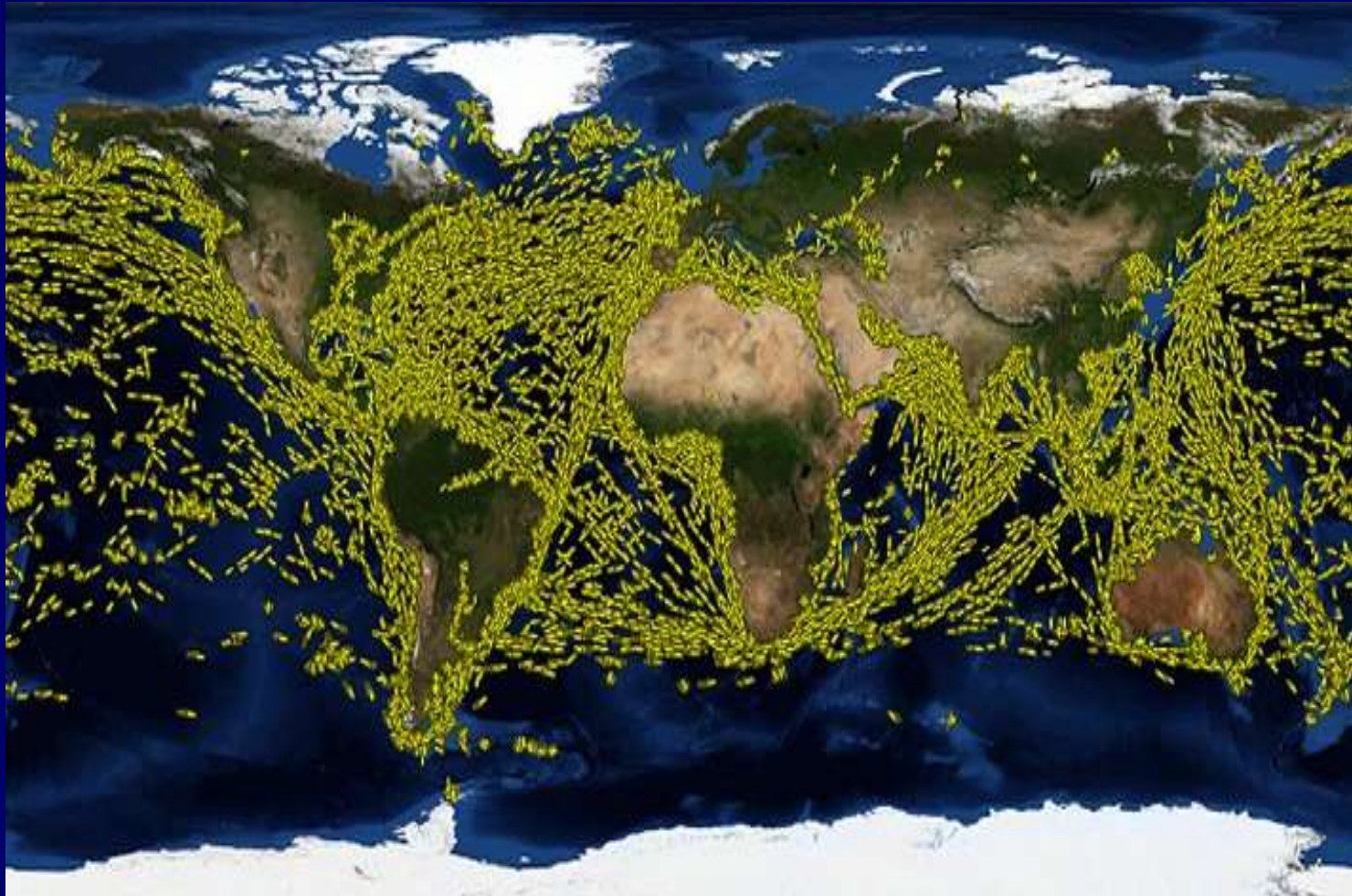
PORT DEVELOPMENT PROJECTS

Agenda

- **Strategic Location of Port Louis**
- **Port Trade Performance 2016/17**
- **Main Findings of the Port Master Plan Study 2016.**
- **Port Development Projects.**



One day's ship traffic as seen from space



Strategic Location of Port Louis

- Mauritius is strategically located in the south west of the Indian Ocean, at the cross road of main maritime routes linking Far East, Africa, South America.
- Country's only maritime gateway for External trade (99.5%).
- Contributes 2% to country's GDP.
- Vital connection for Indian Ocean islands & peripheral regions.
- Over last decade, value of Eastern and Southern Africa's trade increased at 2.7% p.a c.f. World trade growth of 1.6% p.a. This growth is expected to be sustained over next two decades.
- Significant growth in Maritime Trade between the Far East and Emerging Economies of Africa and Latin America.

Port Trade CY2016/17

Total Traffic – new record

7.5 MT (+6.8%)

•Dry Bulk Traffic (Cement, Coal, Wheat, Sugar...)

1.8 MT (+6.9%)

•Liquid Bulk Traffic (Petroleum Products, Molasses...)

1.5MT (+8.7%)

Total Container Throughput

513,847 TEUs (+7.5%)

Captive Container Traffic

257,424 TEUs (-1.6%)

•Laden Captive Import-new record

115,530 (+3.1%)

•Laden Captive Export

58,449 (-4.2%)

Transshipment Container Throughput

256,423TEUs (+18.5)

Total Fish Traffic

155,614 tonnes (+0.9%)

Total Bunker – new record

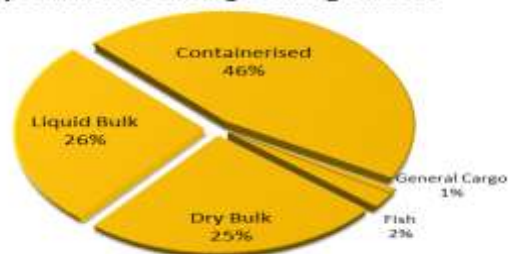
404,837 tonnes (+39.1%)

2,993 (+1.7%)

Container vessels: 562 (-0.2%)

Fishing vessels: 1027 (+4.9%)

Composition of Total Cargo Tonnage in 2016



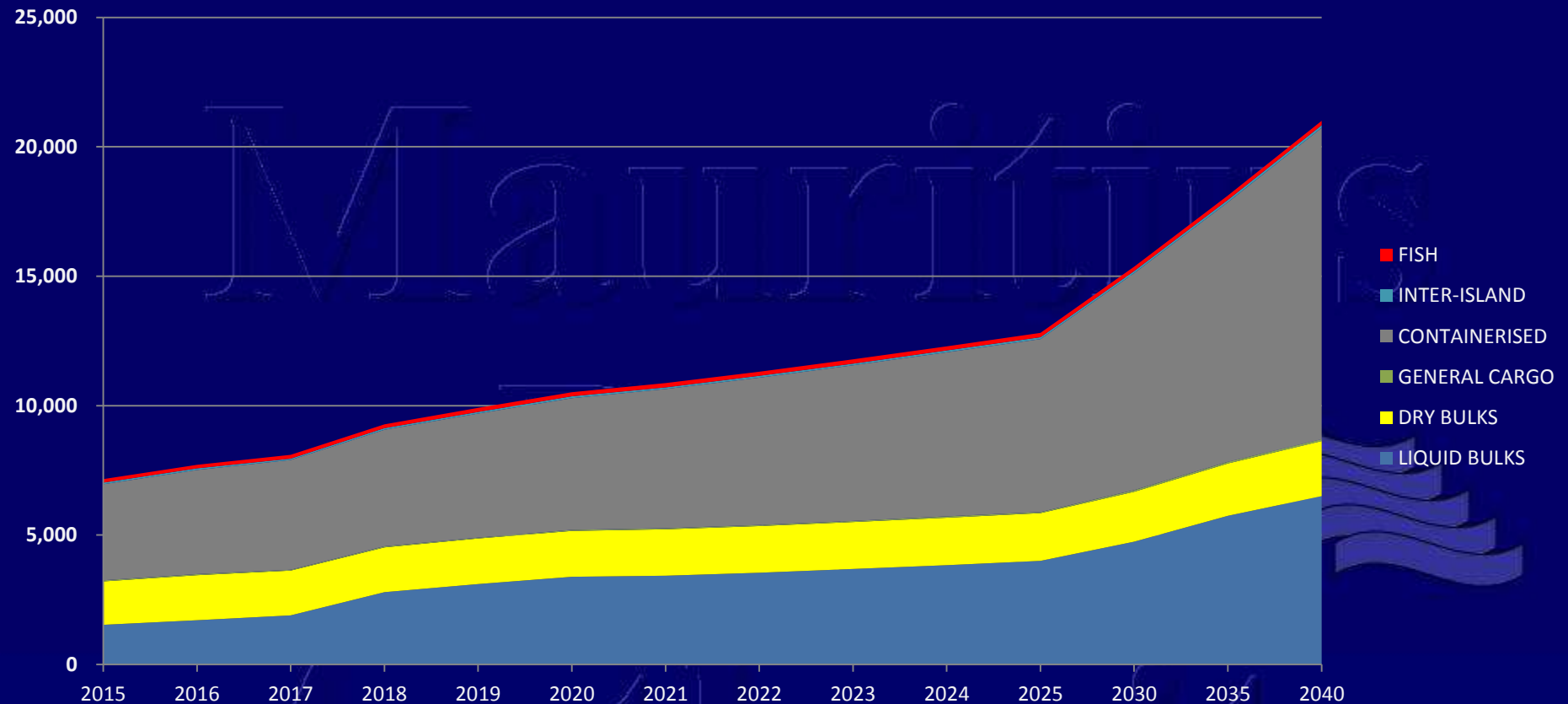
Mauritius Ports Authority

PORT MASTER PLAN 2016

Royal Haskoning DHV



Cargo forecast and bottlenecks



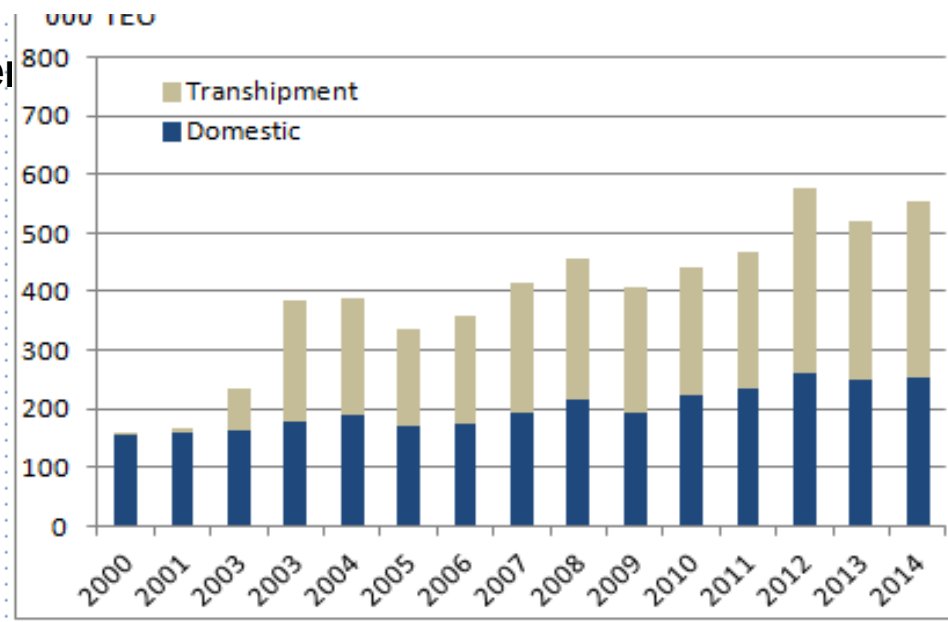
- Significant increase in Cargo traffic will be registered in Liquid Bulk and Containers.
- Port infrastructure bottlenecks: petroleum products and containers

Existing situation: container



Mauritius is located at the intersection of several different main container shipping lanes, ideal for hub-and-spoke transshipment to East Africa and other Indian Ocean islands, as well as relay transshipment for longer distance routes.

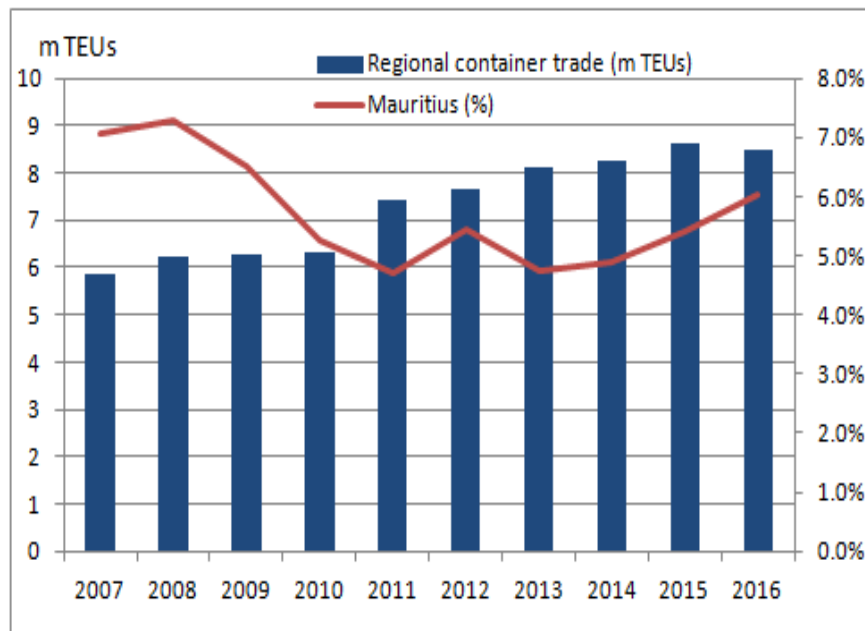
Since 2000, transshipment traffic has been growing strongly. In 2014 it totalled 300,000 TEU (in + out). There was also 250,000 TEU of local cargo in 2014, supported by a robust economy growing at 4% p.a. The region in general, and Mauritius in particular, has performed relatively well during the recession.



Regional Container trade

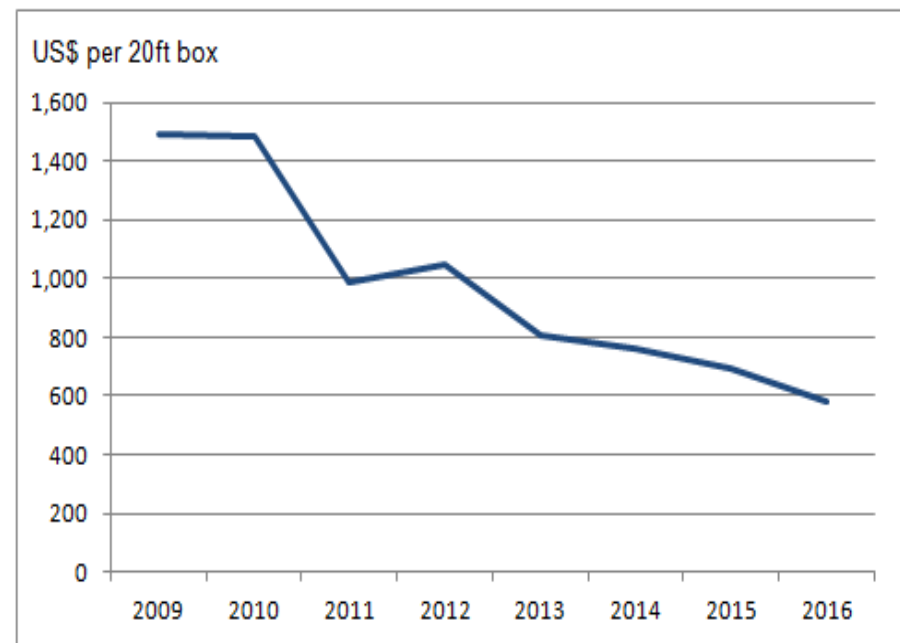
- Over the last ten years Eastern & Southern Africa's container trade has increased at an average rate of 4.2% p.a.
- Trade growth has been helped by a dramatic fall in container freight rates.
- Mauritius' share of regional container trade is around 5%.

Mauritius share of regional container traffic



Source: World Bank

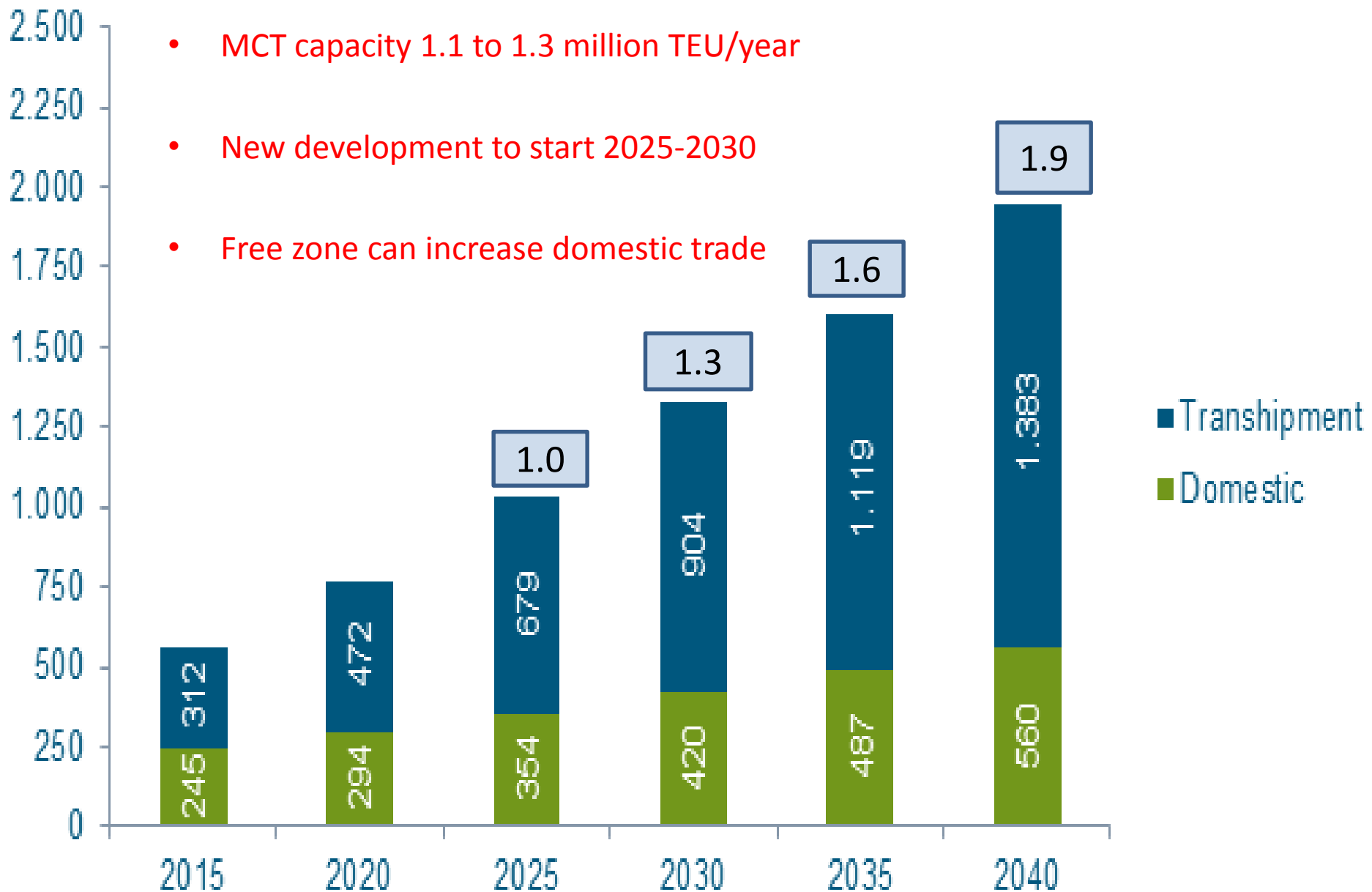
Shanghai –Durban freight rates (US\$ per 20ft box)



Source: Drewry Maritime Research

Transshipment Study – Growth Triggers

- MCT capacity 1.1 to 1.3 million TEU/year
- New development to start 2025-2030
- Free zone can increase domestic trade



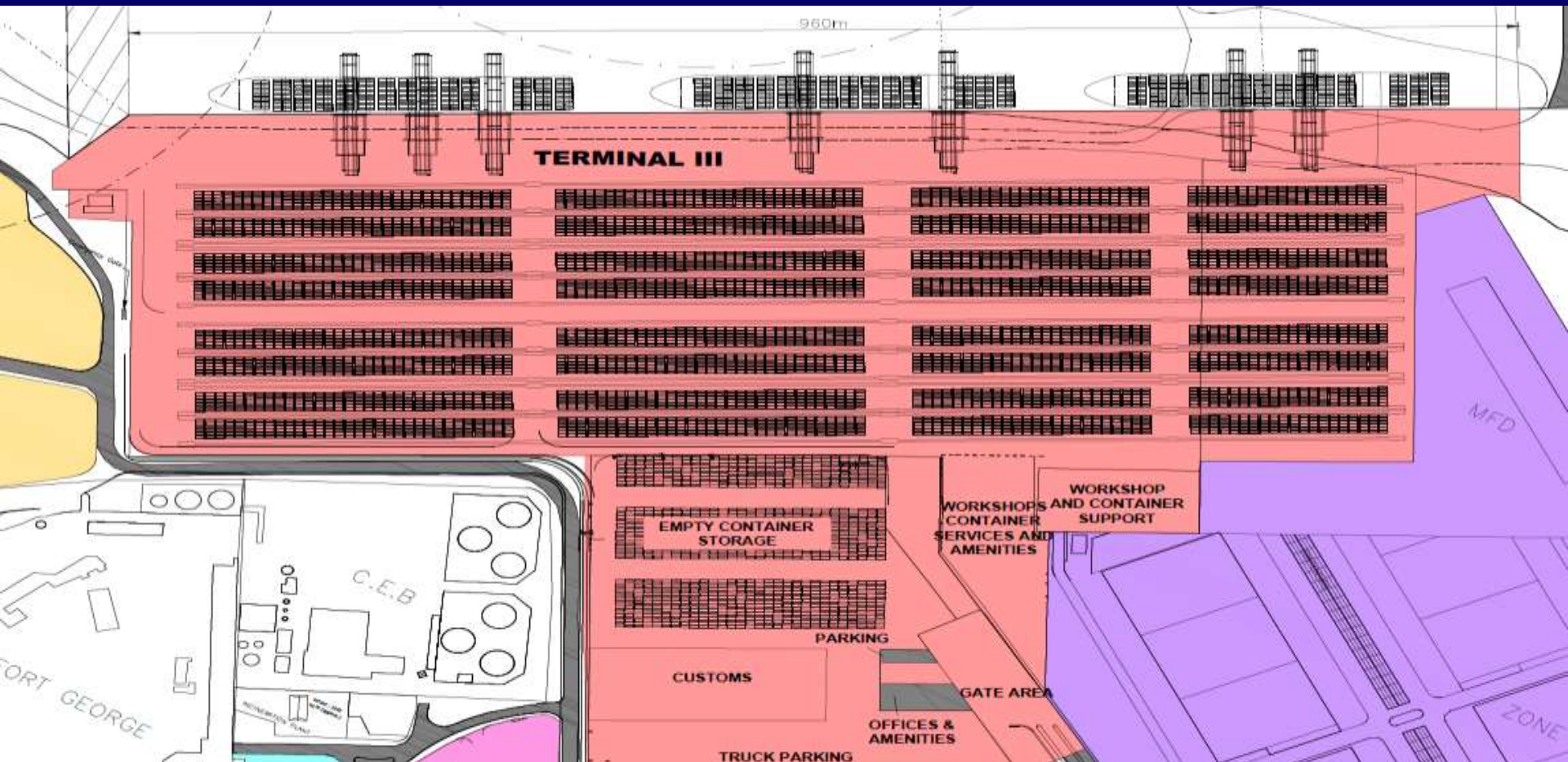
Extension of the Container Terminal

- The MPA proceeded with the Extension of the 560 m long berth by 240m, strengthening of the existing berth and the Expansion of the Container stacking yard by 7.5 ha in December 2014 and works were completed in June 2016.
- The capacity of the Terminal has increased from 500,000 TEUs to 750,000 TEUs. The Capacity can be further increased to around 1 million TEUs with additional Container handling equipment and an enhanced mode of operation.
- Dredging of Navigational Channel from 14.5 to 16.5 m completed in June 2017.
- The dredged material recovered used for Land reclamation of about 39 ha at Fort William and Fort George.
- On the other hand, CHCL has already procured additional yard handling Equipment and Two STS Cranes with an outreach of up to the 22nd row of containers.
- With the above development, shipping lines are showing interest to increase transshipment activities. It is expected that by 2019, container throughput would reach the Terminal capacity of 1 M TEUs.

Extension of the Container Terminal on Completion



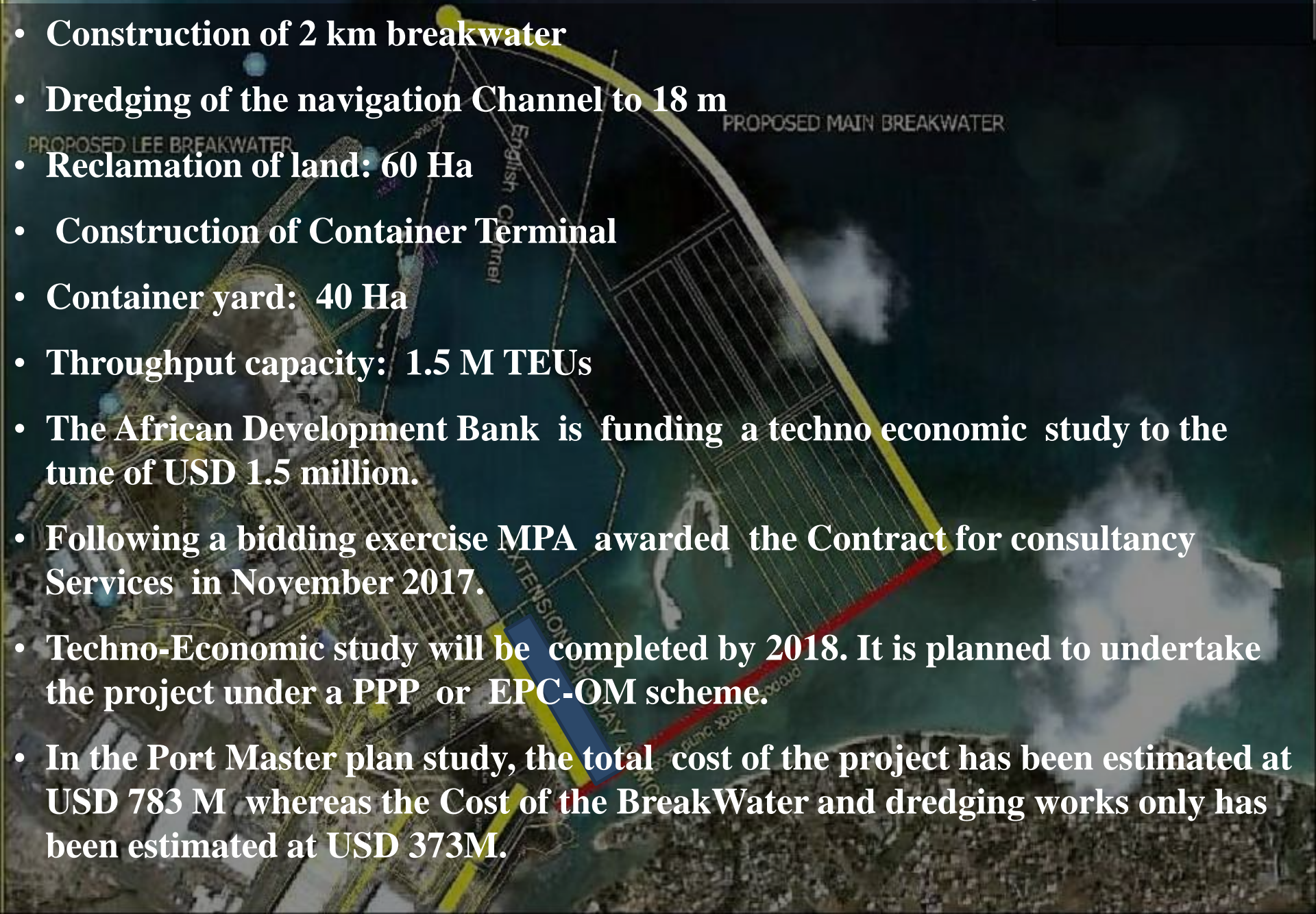
MCT

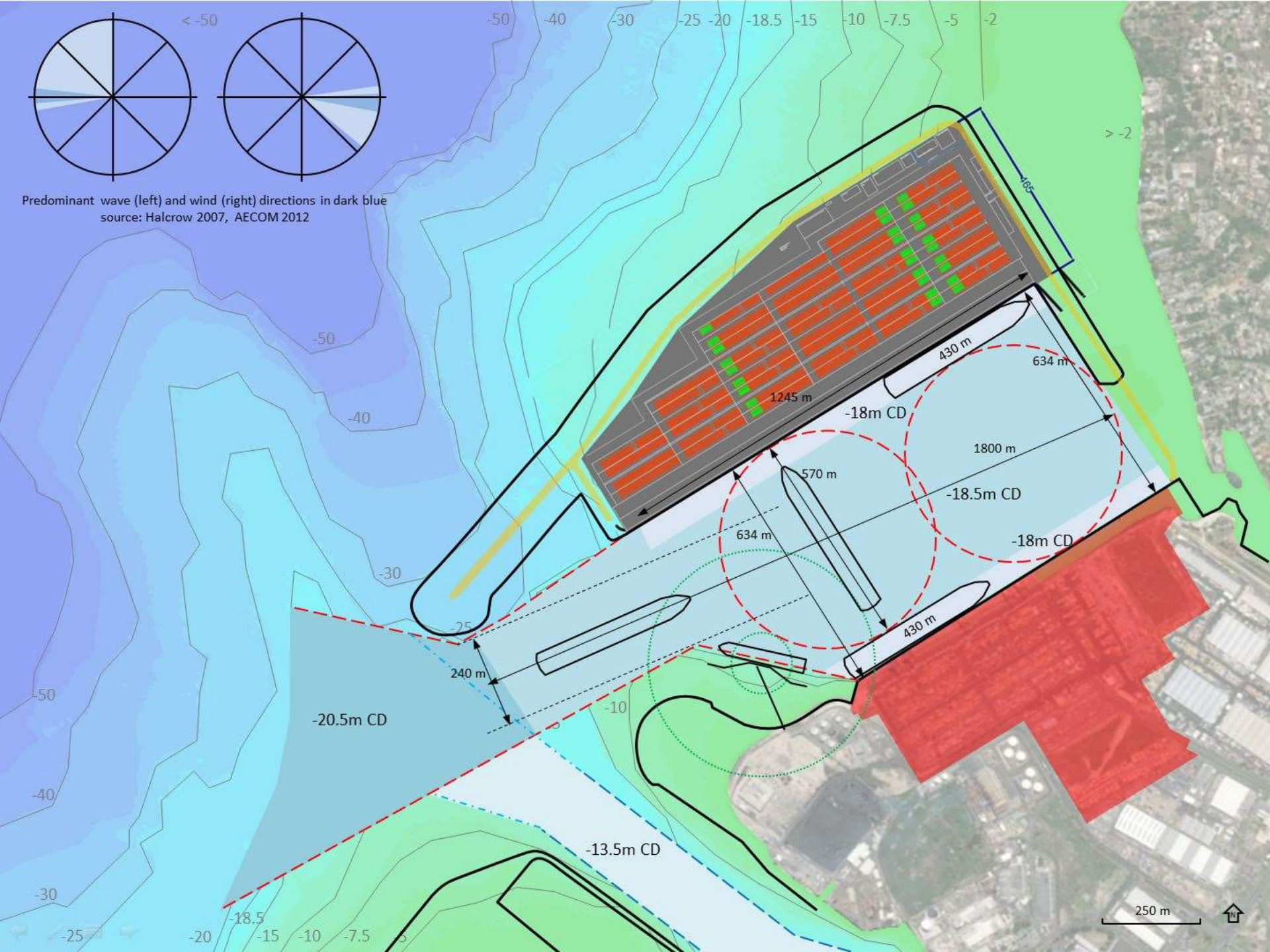
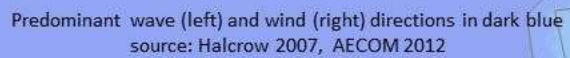


- New Gate System with Modern security and CCTV system.
- Extended areas for storage of Empty Containers
- New Operation Building, Customs verification and truck parking.
- Capacity will increase to about 1.3 million TEUs.
- Estimated Cost Rs 800. million.

Breakwater and Container Terminal – Long Term

- Construction of 2 km breakwater
- Dredging of the navigation Channel to 18 m
- Reclamation of land: 60 Ha
- Construction of Container Terminal
- Container yard: 40 Ha
- Throughput capacity: 1.5 M TEUs
- The African Development Bank is funding a techno economic study to the tune of USD 1.5 million.
- Following a bidding exercise MPA awarded the Contract for consultancy Services in November 2017.
- Techno-Economic study will be completed by 2018. It is planned to undertake the project under a PPP or EPC-OM scheme.
- In the Port Master plan study, the total cost of the project has been estimated at USD 783 M whereas the Cost of the BreakWater and dredging works only has been estimated at USD 373M.





Mauritius **CRUISE TOURISM** Ports Authority



The Cruise Terminal Building

- In 2017/18 cruise season, we are expecting some 34 cruise vessel calls and about 40,000 passengers as Fred Olsen Lines and AIDA Cruises will start Homeporting activities at Port Louis this year.
- The number of cruise vessels calls and passengers are expected to increase to 60 and 60,000 respectively by 2025.
- MPA is proceeding with the construction of the Cruise Terminal Building to accommodate both cruise and inter-island passengers. The facility will comprise the passenger terminal , commercial areas, office space including parking facilities.
- The contract for Consultancy Services has been awarded to Messrs Bermello Adjamil (USA) in November 2015.
- Preliminary design has been completed. Estimated Cost is Rs 690 million.
- On 26 September 2017, MPA has launched the invitation for prequalification of Contractors.
- Proposals have been received on 7 November 2017 and are being assessed by the Central Procurement Board.
- The project is expected to start in June 2018 and will be completed by end 2019.

BST berth to accommodate a 2nd vessel





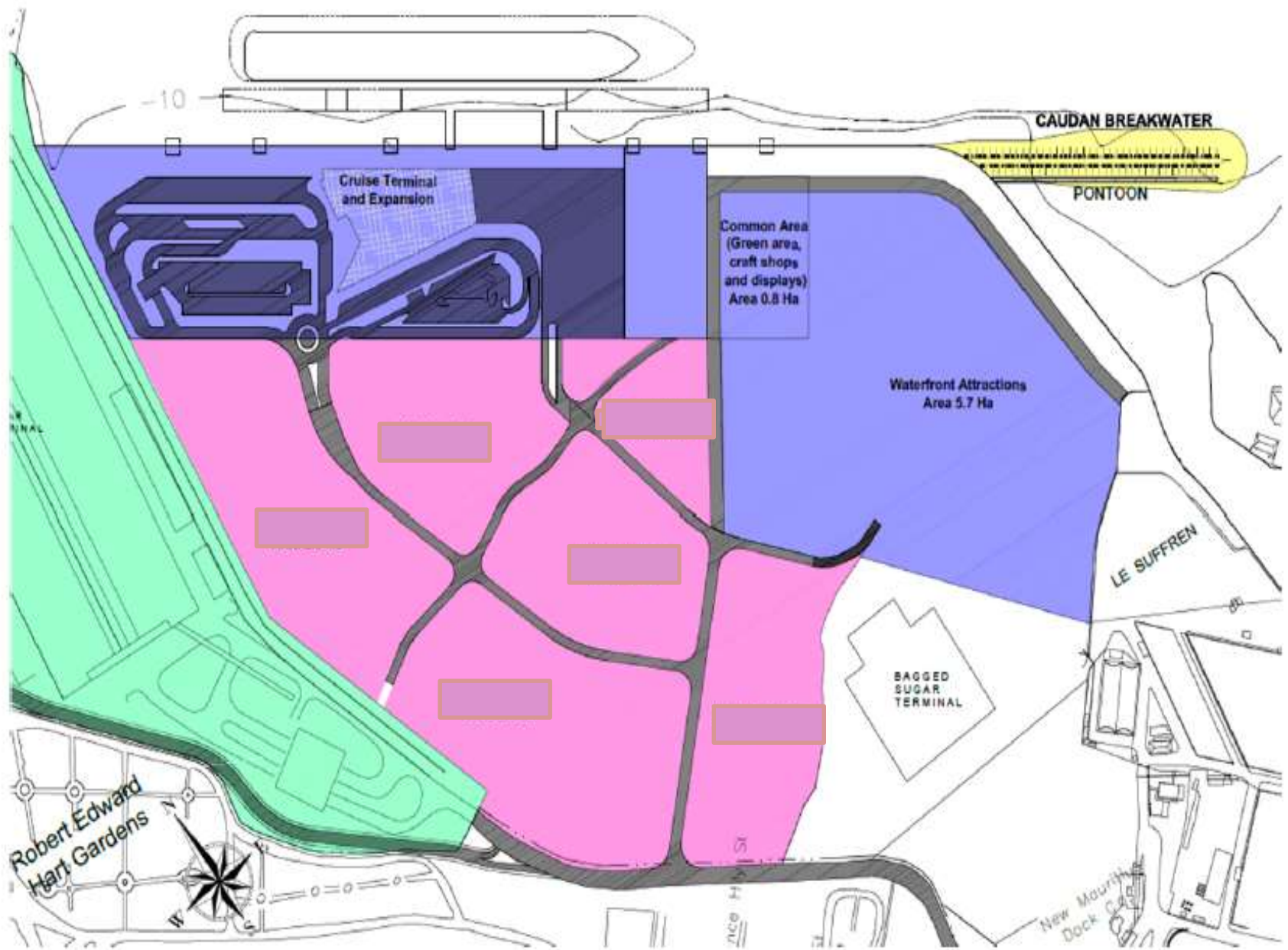


Figure 9-51: Preferred layout for Les Salines

Mauritius **SEAFOOD** Ports Authority



Seafood - Constraints / Opportunities

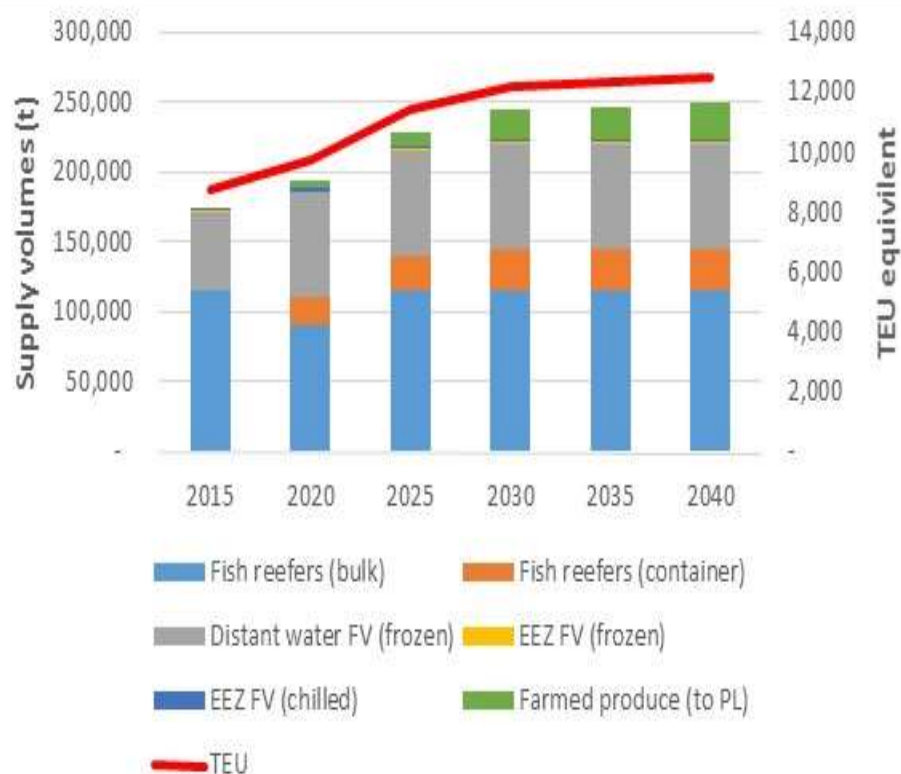
- Two main players in Tuna canning and Loins
- All WIO tuna resources almost at maximum sustainable yield
- Focus on (i) high quality (-40°C) products and (ii) sustainable / ethical practises
- Increased loin preparation for EU and other canners
- Added-value products – smoked, bottled and packaged
- Fresh fish products to EU and other markets
- Albacore for the US market



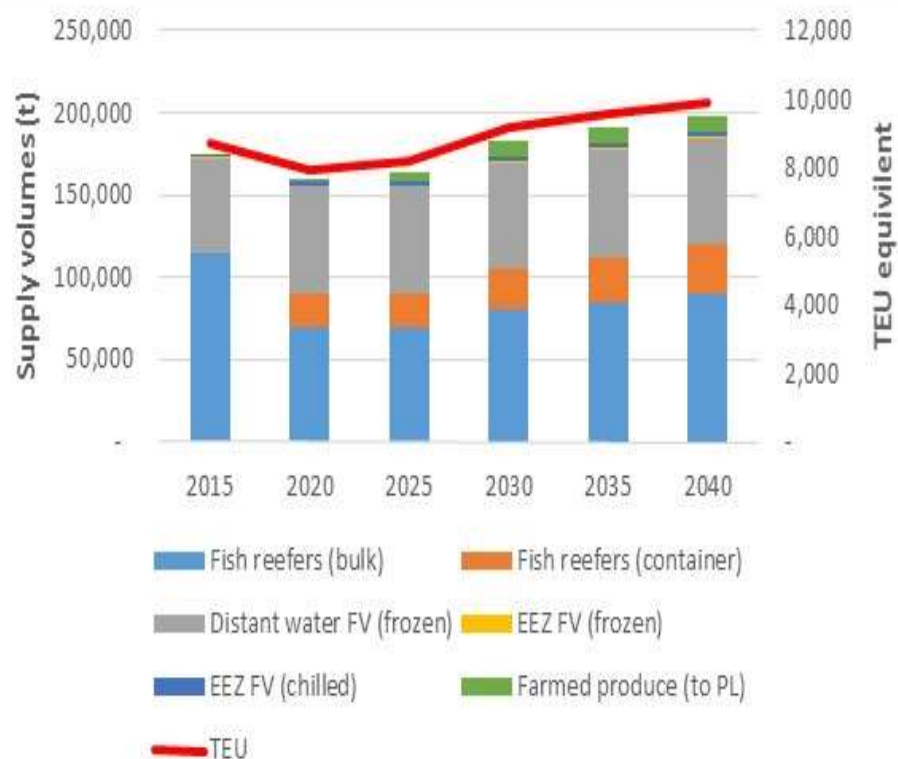
Fish - forecast

- Volumes increased from 30,000T in 1999 to 143,410T in 2014
- Forecasts for 2040: Base Case: 250,000 T. Low Case: 200,000 T

Base Case



Low Case



Mauritius BUNKERING AND PETROLEUM HUB. Ports Authority

Bunkering Activities

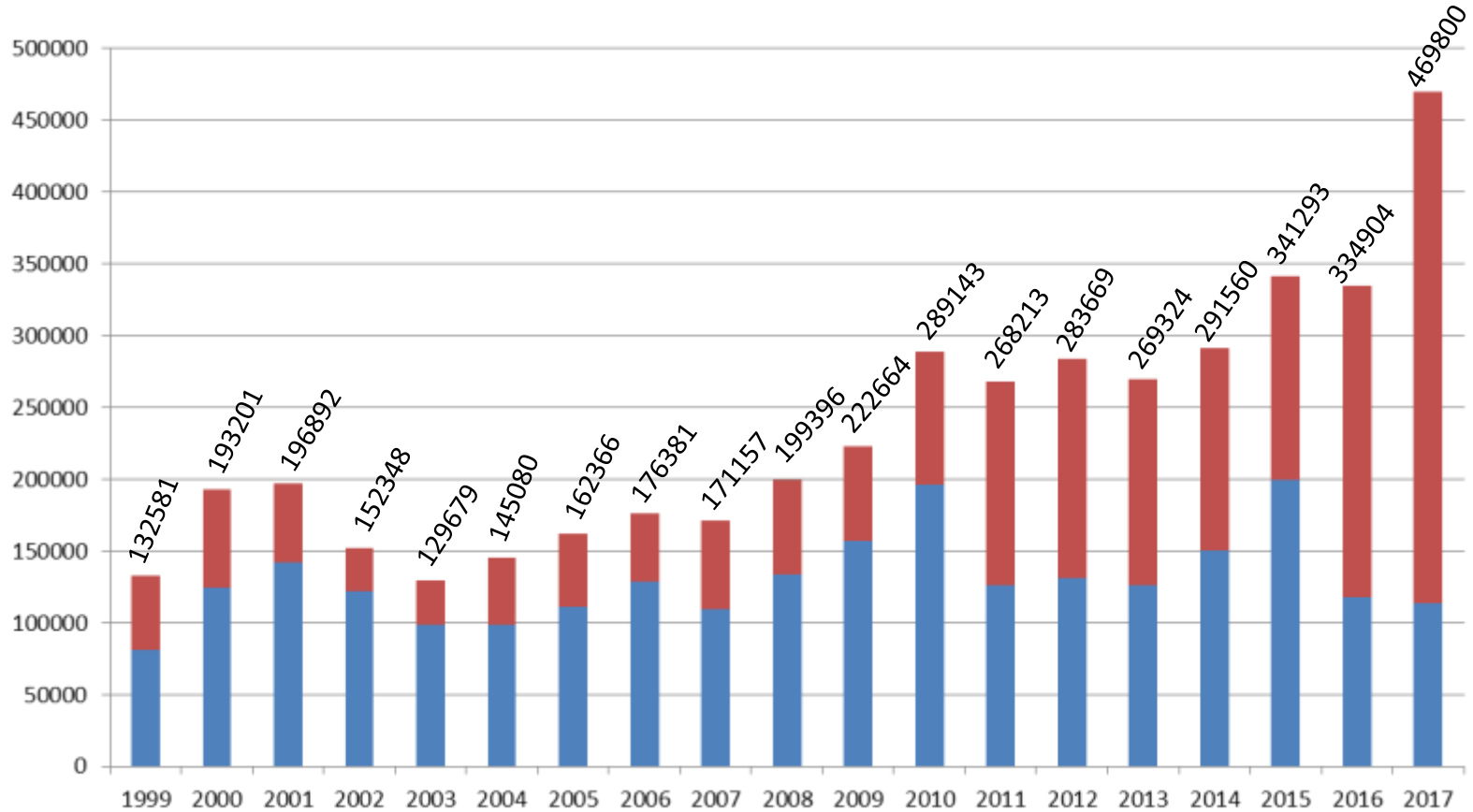
- Bunker in the region is in the order of 5 million Tonnes.
- Imports of petroleum products for bunker has been liberalised since January 2014 with a view to reducing price of bunker fuel at Port Louis.
- In 2015, only 284,284 MT of bunker was supplied. This volume increased to 336,914 in 2016 with the arrival of a new player – BOMIN.
- Out of 2,934 vessels calls that called in 2016, 1977 vessels took bunker at Port Louis.
- For year 2017 the bunker supply was about 470,000 MT (+39.4 %).
- Strategically located, Port Louis has the potential to increase its share of this business activity.

Incentives Offered by the MPA

- MPA has extended the anchorage area and levies preferential tariffs to vessels calling for bunker.
- A vessel calling for bunkering purposes is granted a discount of 50% on pilotage, tug , port and anchorage dues.
- This discount has been extended to vessels calling for bunker as well as undertaking other port related activities.

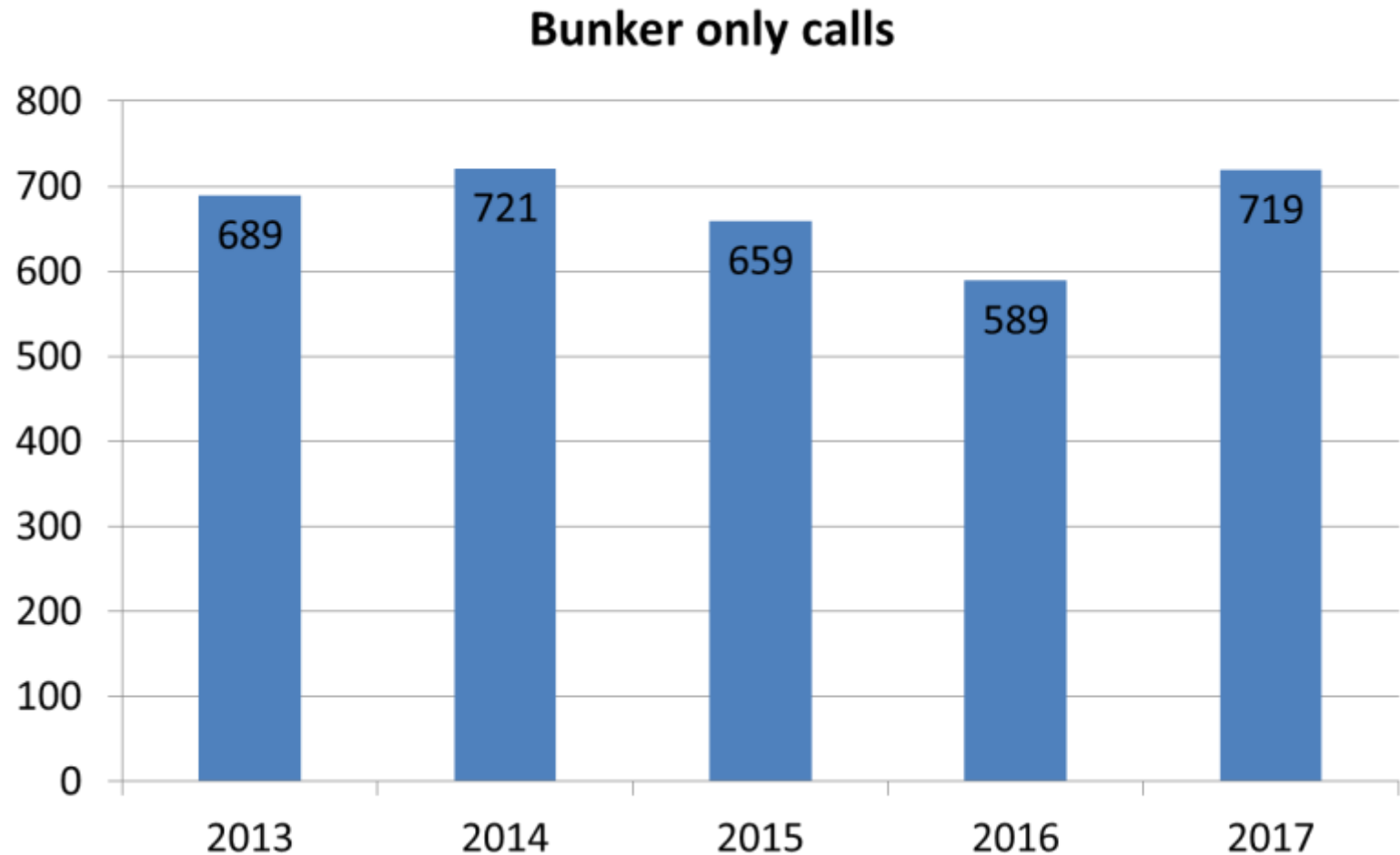
Evolution of Bunker Activities

Total Bunker Supplied 2000-2017 (tonnes)



BY																			
BARGE	51058	68530	55144	30346	31068	46455	51160	47569	61357	66068	65824	92543	141861	152911	143453	141000	141420	216798	355882
THROUGH																			
PIPELINE	81523	124671	141748	122002	98611	98625	111206	128812	109800	133328	156840	196600	126352	130758	125871	150560	199873	118106	113918

Evolution of Bunker Activities



Petroleum hub: non-captive bunker sales

- **Existing market share:** Increased from 5% in 2013 to about 9 % in 2017.
- **Future market share – main factors:**
 - Range of fuels;
 - Price;
 - Diversion distance;
 - Bunker suppliers;
 - Alternative fuel sources.
- **Overall hub forecast**

(x 1,000 tonnes)	2014	2025	2040
Base case	257	1,470	2,648
High forecast	257	2,570	5,475
Low forecast	257	491	697

ALBION

Area within buffer zone : 448ha (approx)

Proposed Jetty

Proposed Jetty

**ALBION
LIGHTHOUSE**

Belle Vue

to Albion

**Camp
des
Embrevades**

Indian Oil

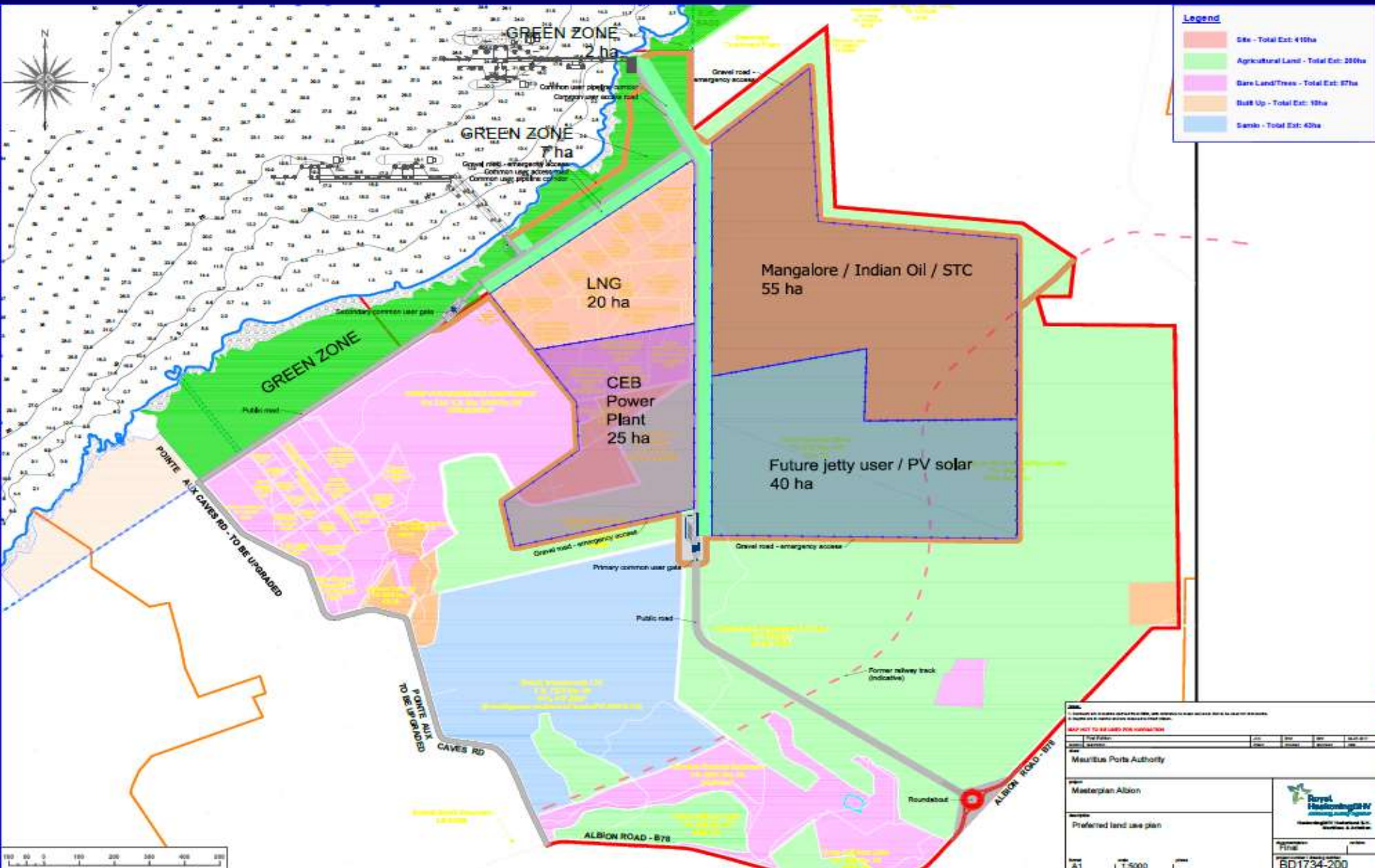
to Gros Cailloux

22 sept 2016

19 JAN 2018

MPA
Marine Policy Association

Conceptual Planning for Albion



PROPOSED DEVELOPMENT FROM ALBION TO JIN FEI



LINK ROAD TO JIN FEI
 - LENGTH OF ROAD 3.8 Km (approx.)
 - WIDTH OF ROAD 10 TO 12 METERS (approx.)
 - EQUIPMENT FOR LAND ACQUISITION
 - EQUIPMENT FOR ACQUIRING EASEMENTS ALONG THE PROPOSED ROAD TO ANCHOR SITE
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REFINE AND FURTHER ANALYSIS
 (ACTION TO BE RECONSIDERED)

PROPOSED LINK ROAD TO PORT WILLIAM
 PROPOSED ROAD
 EXISTING ROAD
 PORT LIMITS

ALBION
 WIDENING OF EXISTING ROAD FROM INDIAN OIL TO PTE AUX CAVES LIGHTHOUSE
 LENGTH 4.8 Km (approx.)

FORT WILLIAM

JIN FEI

JIN FEI

ALBION

PORTAL PLAY
 SITE 1718

Area : 7.5 ha

DEVELOPMENTAL SETTLEMENT
 (ACTION TO BE RECONSIDERED)

LAND BOUND TO BE ACQUIRED
 (ACTION TO BE RECONSIDERED)

Lighthouse
 Pte aux Caves

Area : 20.32 ha

Belle Vue

Camp des
 Embrevades

Petite Rivière

Indian Oil

to Glen Colquhoun

to Albion

Mauritius Ports Authority

Ship Repairs and Ship Building



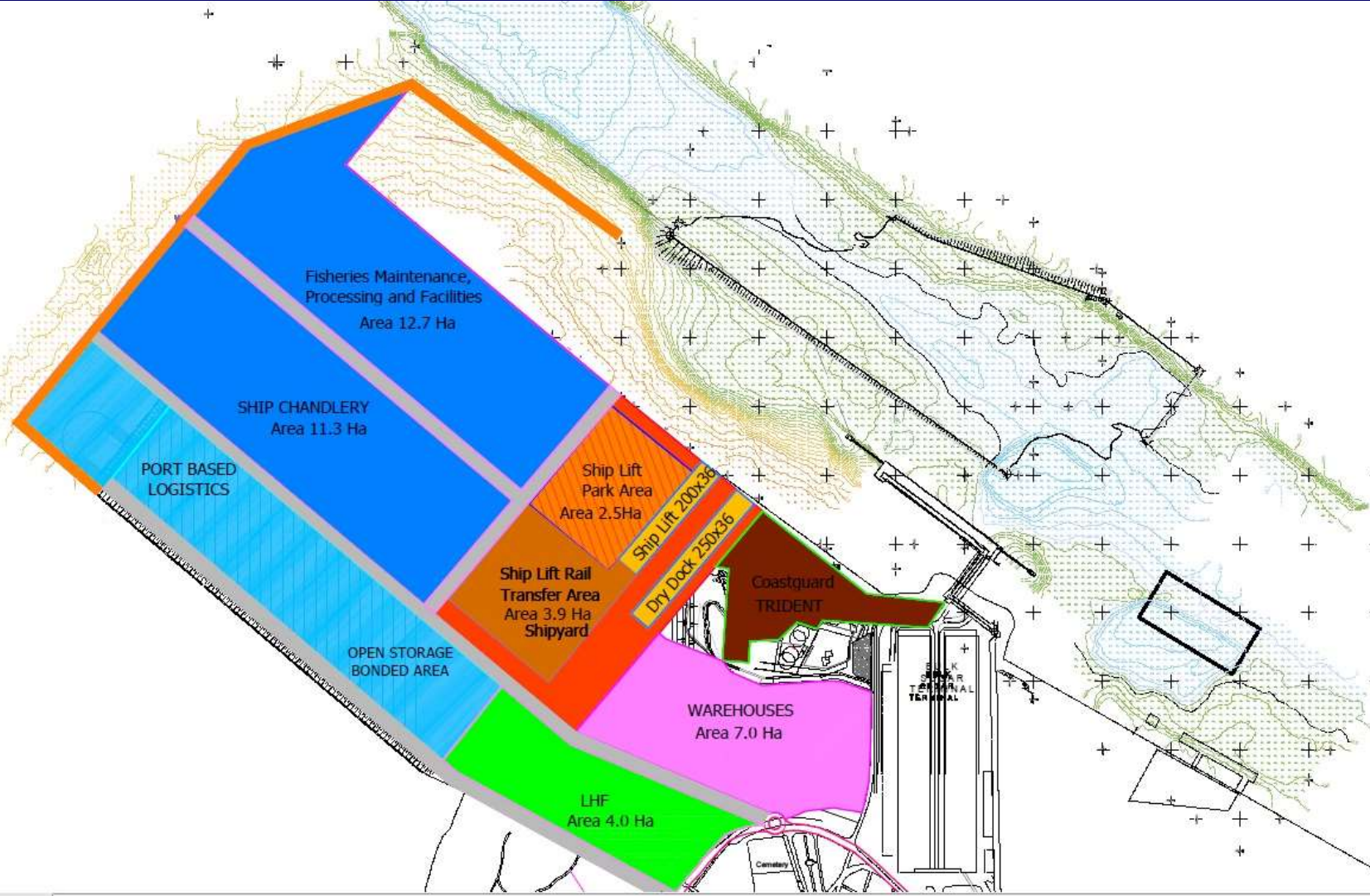
Ship Building

- There are already two dry dock facilities for ship building and maintenance at Port Louis.
- MPA received proposals for the construction of dry docks and ship construction facilities which could not be considered due to lack of space.
- Within the land to be reclaimed at Fort William, an area will be earmarked for a third dry dock.

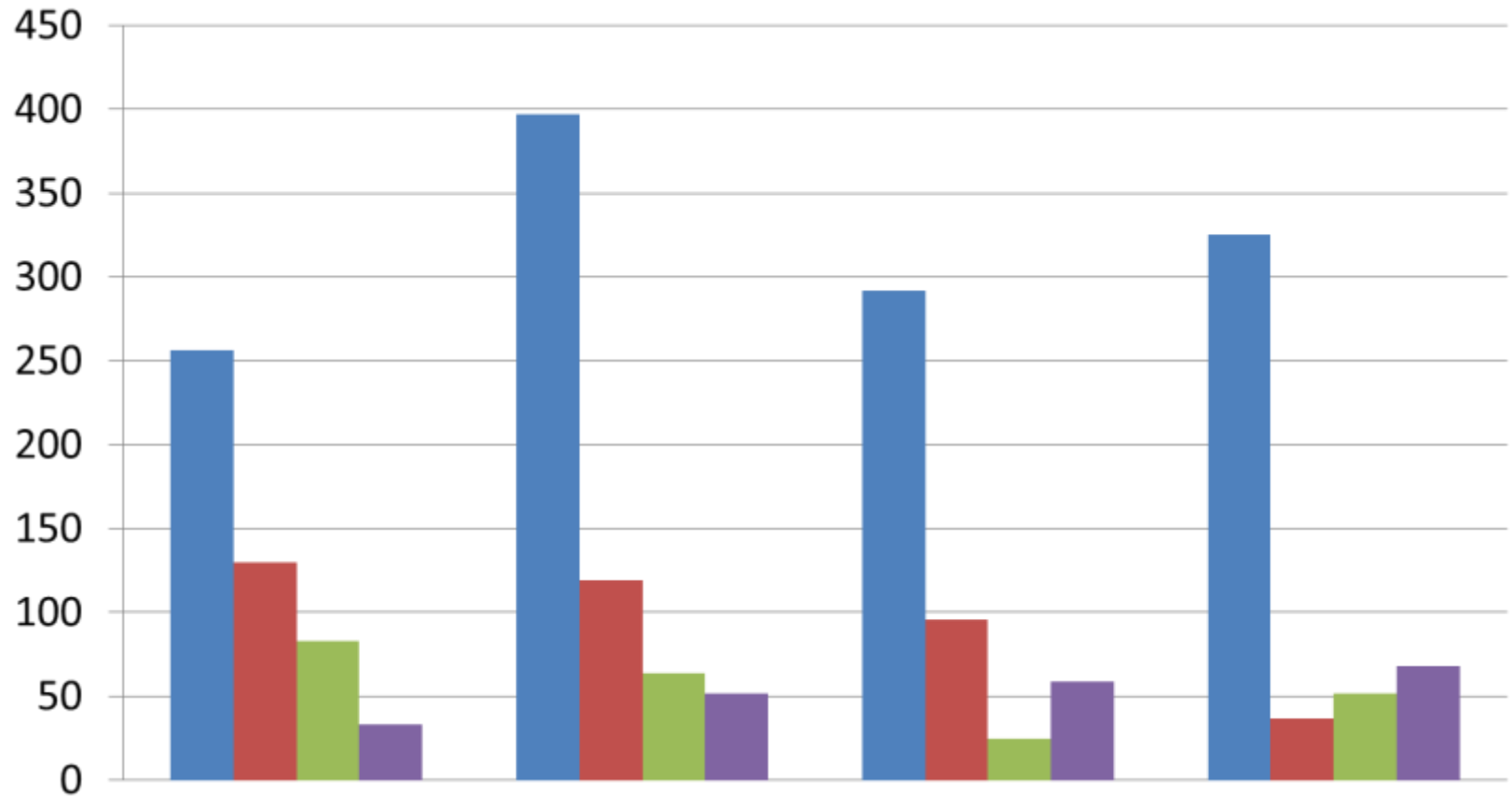
Ship Building

- There are already two dry dock facilities for ship building and maintenance at Port Louis.
- MPA received proposals for the construction of dry docks and ship construction facilities which could not be considered due to lack of space.
- Within the land to be reclaimed at Fort William, an area has been earmarked for a third dry dock.
- MPA will launch an expression of Interest once the land area is ready for construction around end 2019.





Ancillary Services 2013-2017



	2013	2014	2015	2017
Change of crew	256	397	292	325
Change of Security Guard	130	119	96	37
Ship Stores	83	64	25	52
Repairs or Inspection	33	52	59	68

Port Louis Harbour – Long Term



Mauritius Ports Authority

THANK YOU

