

Colombo International Maritime & Logistics Conference

South Asia Outlook



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APM TERMINALS
Lifting Global Trade

Who are we?

- 60 operating ports and terminals
- 33 countries
- 27,000+ vessel calls (2023)
- 21.7 million moves (2023)



APM Terminals operates 6 out of the top 10 most efficient container terminals in the world*

*as ranked in The Container Port PERFORMANCE INDEX 2023 published by the World Bank and S&P Global Market Intelligence.

South Asia: A land of opportunities

23% Of global population

6-7% Average GDP growth in the region

8% Growth in container throughput



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Demand & Growth Drivers in South Asia

Manufacturing shift:

China + 1 strategy offers potential to grow for every country in South Asia



Demographic dividend:

The young and middle-class population is driving up the consumption and changing market trends



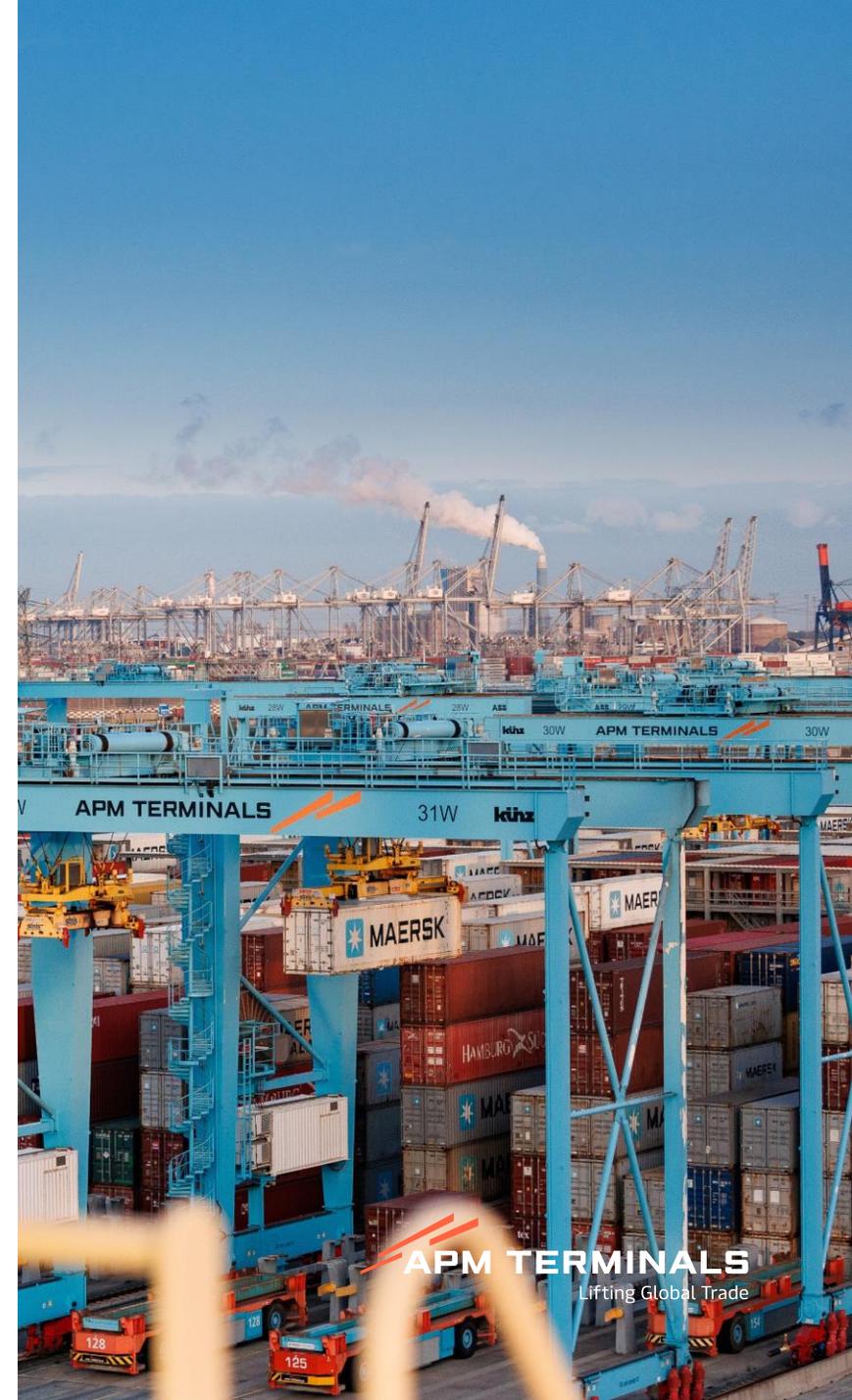
Infrastructure development:

Every Government is extremely keen on investing in infrastructure



Digital Transformation:

South Asia has set the benchmark high in digitalisation



Challenges & opportunities in South Asia

Pakistan

Investing in connectivity, with opportunity to reduce trade barriers and unlock supply chain potential

India

Emerging maritime powerhouse with infrastructure and economic development

Colombo

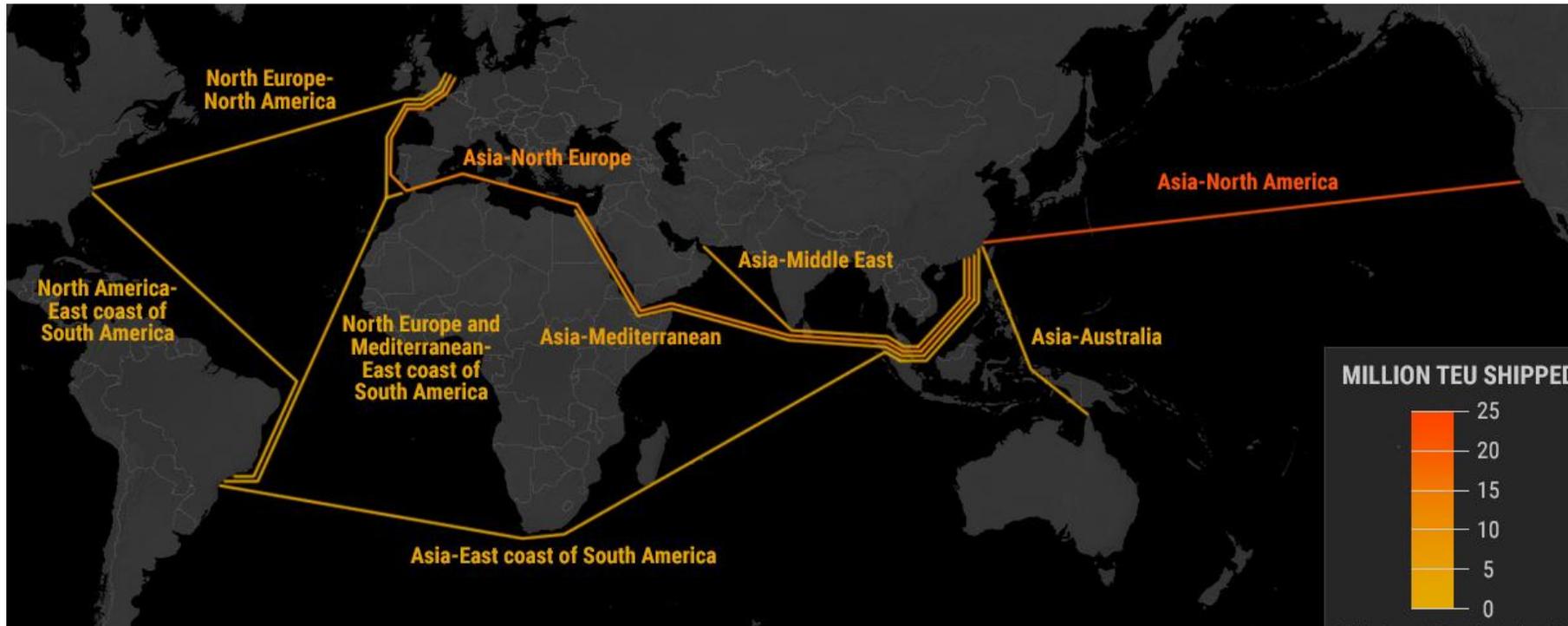
Strategic hub with opportunity to grow

Bangladesh

Export-oriented economic development, developing improving port infrastructure

Port of Colombo:

A continued strategic hub



- **Perfectly located**
- **Expanding deep-water capacity**
- **Opportunity for improved efficiency**

APM Terminals lifting the standard of...



Connectivity

Pipavav : Fast-tracking the switch to the fast, environment friendly and reliable Dedicated Freight Corridor (DFC)



Efficiency

Mumbai : USD115m investment in to accommodate larger vessels and increase terminal capacity by 10%.



Efficiency

Colombo: Paperless import delivery process for seamless and contactless trade in Covid; Live digital dashboard on the performance of vessels at



Proactivity

Pipavav : **commenced Very Large Gas Carrier (VLGC)** operations this year, Construction of a new liquid berth (US\$ 90 million).



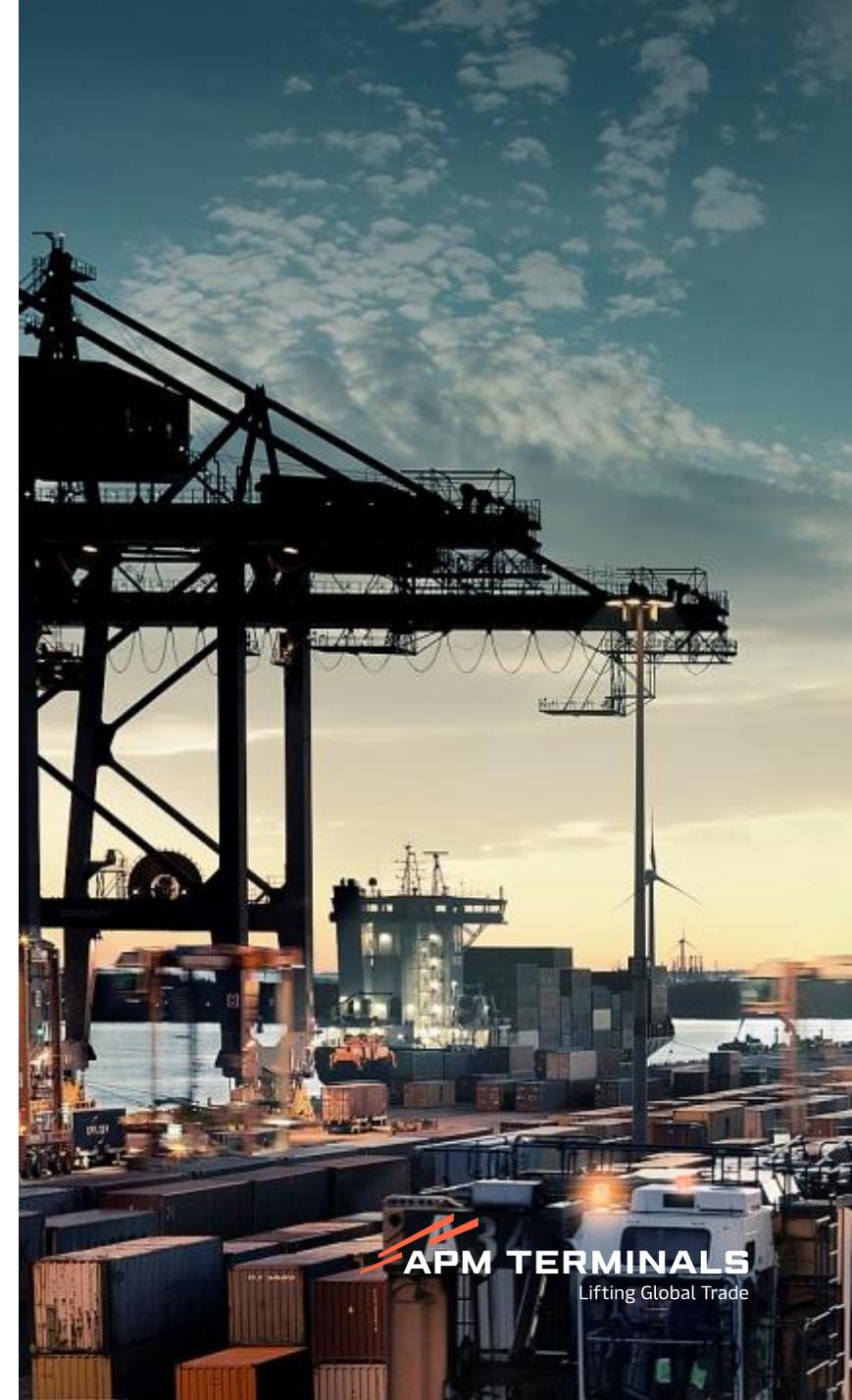
Proactivity

Laldia Container Terminal: A G2G Collaboration between Bangladesh and Denmark in which APM Terminals will negotiate a concession agreement to design, build and operate this terminal



Responsibility

Colombo: USD 8 million investment in converting RTGs to hybrid power for a 50% reduction in diesel consumption. Also investing in rooftop solar energy.



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