

Welcome to Marseille Fos !



Istanbul & Marmara, Aegean, Mediterranean, Black Sea Regions
Chamber OF Shipping



A strategic location in the Mediterranean



Marseille Fos

Two specific Harbors - A multipurpose Port



Marseille,
the Shortsea Port

1 Container & ConRo Terminal + Multipurpose Terminals
(RoRo, ConRo, Cars, Breakbulk, Passengers – cruise & ferry,) – 16 Berths – Draft up to 13 m



Marseille,
Container Terminal



MED EUROPE TERMINAL

Quay length: 1 km
Draft: 10 - 11 mètres
3 Panamax Cranes
Storage Capacity: 32 h
Container & ConRo Vessels



ISO 28 000



Marseille,
Combined Transport Terminal

**RAILWAY-ROAD
MOUREPIANE TERMINAL**
A massive railway terminal
(850 m) between port and
city dedicated to continental
and maritime traffic, ideally
located for city logistics



Fos,
the Global Port



- 1 Petro-chemical Port Complex:**
Fos, 3rd Port worldwide: 57MT
- 2 Private Container Terminals:**
Eurofos 80ha – Seayard 50ha
2600m quay length / Draft 14.5 / 16m
- 2 Car Terminals :**
GEFCO 6 ha – GCA-TEA 14 ha //
Renault-Nissan, Peugeot-Citroën, Fiat,
Group
11.5 m draft
- 3 Breakbulk & Heavy Lift Terminals**
Draft 11.5 / 18.6 meters
Vessel Capacity up to 230.000t



Fos,
the global deep sea port



FOS 2XL
EUROFOS & SEAYARD



Seayard Terminal


Operator: Seayard
Fos Holding: MSC-TIL/APMT/Cosco
800 m quay length
50 hectares,
Draft of 15 to 16 m



Terminal de la Méditerranée


Operator : Eurofos
Port Synergy : Terminal Link-China Merchant/
DPW
1400 m quay length
80 hectares,
Draft of 15 -16m


TOTAL THROUGHPUT IN 2014



Total Throughput: 78,5 MT (-2%) 

General cargo: 17,7 MT (+3%) 
Incl. Containers: 1.173 M TEU (+7%) 
Of which + 10% in Fos

Dry Bulk: 13,4 MT (+2%) 

Liquid Bulk: 43,6 MT (-5 %) 

Passengers: 2,46 million 
Incl. Cruise: 1,3 million (+12%) 

60 WORLDWIDE SHIPPING SERVICES

7.500

CALLS IN 2014

35

REGULAR SHIPPING
LINES IN MARSEILLE

25

REGULAR SHIPPING
LINES IN FOS



48 NORTH-SOUTH (Mrs & Fos) SERVICES



12 EAST – WEST SERVICES



A Reliable Port



ALL VESSELS ARE
OPERATED UPON ARRIVAL

NO WAITING TIME



NO LOCAL STRIKES FOR
THE PAST 3 YEARS

Reliability and efficiency

Congestion free port
Berthing upon arrival

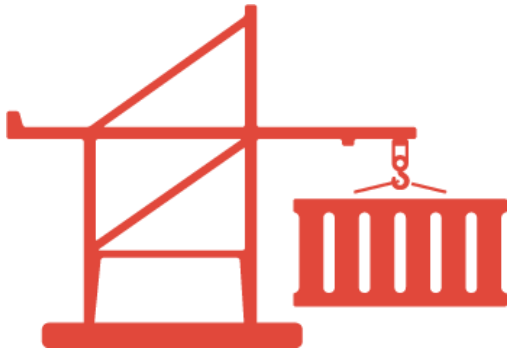


PRODUCTIVITY:

28 to 45 MOVES PER HOUR AND PER GANTRY CRANE

EQUIPMENT:

IN FOS, 13 GANTRY CRANES INCLUDING
4 SUPER POST-PANAMAX CRANES
IN MARSEILLE, 3 PANAMAX CRANES



A Reliable & Secured Port



A FULLY ISPS COMPLIANT
SECURED PORT LOGISTICS
CHAIN

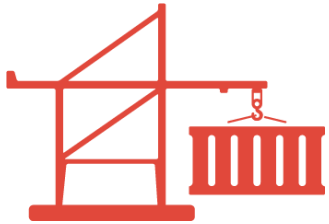


SAFETY AND SECURITY
OF THE SHIPPING WATERWAY
PRESENCE OF A SQUADRON
OF MARITIME POLICE

600 SECURITY CAMERAS
2 SAFETY TEAMS
3 SURVEILLANCE SHIPS

100% SECURITY
FOR YOUR CARGO

A multimodal Port



3 OPTIONS FOR INLAND TRANSPORT



Road Transport



80% OF CONTAINERS
ARE CARRIED BY ROAD



500,000
TRUCKS PER YEAR



TURN AROUND AVERAGE TIME FOR TRUCKS INSIDE THE
TERMINAL: 25 MIN

Railway shuttles from Marseille Fos

Expressed in rotations per week – updated January 2015 (*Hinterland Departement*)

In 2014 :
99 000 TEUs (+14%)
Modal share ≈ 9%



5 Operators



16 destinations in France
 9 international destinations

Direct services to :

Toulouse/Bordeaux, Paris, Dourges, Lyon, Nancy, St-Etienne/Clermont

New services in 2015

- NANCY : 3 to 5 rotations
- STRASBOURG : 3 to 5 rotations
- 2 additional rotations between MARSEILLE and LYON and between LYON and GEVREY

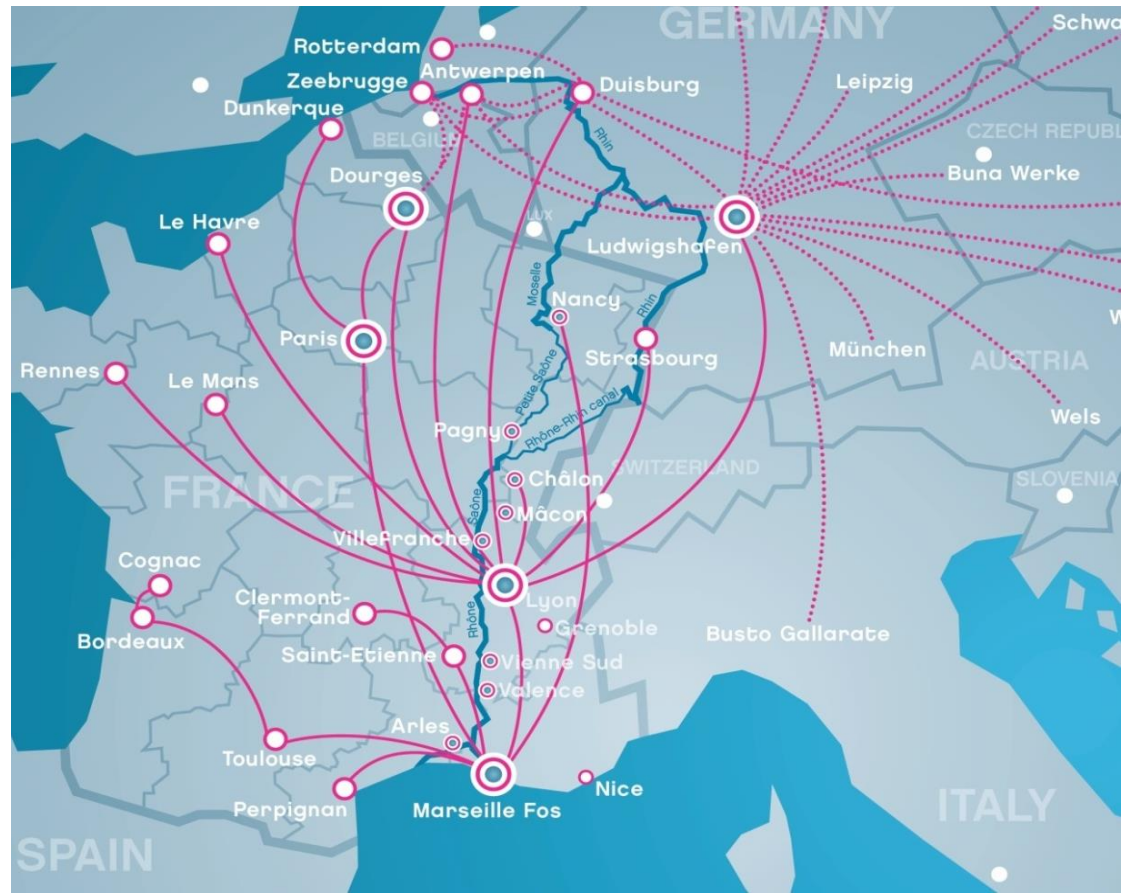
Railway Network

NEW SHUTTLES: CLERMONT FERRAND, ST ETIENNE, GEVREY, NANCY

WEEKLY SHUTTLES



- STRASBURG : 3**
3 VIA FOS & MARSEILLE
- PARIS: 7**
5 VIA FOS & 2 VIA MARSEILLE
- LYON: 13**
5 VIA FOS & 8 VIA MARSEILLE
- FOS-TOULOUSE: 5**
- FOS-BORDEAUX: 5**
Cognac x 4 via Bordeaux
- FOS-GEVREY: 5**
- FOS-SAINT ETIENNE: 3**
- FOS-CLERMONT FERRAND: 3**
- FOS-NANCY: 5**
- FOS-LE MANS: 5**
- FOS-RENNES: 5**
- MARSEILLE-DOURGES: 2**
- MARSEILLE-DUNKERQUE: 1**
- MARSEILLE-CHALON: 3**



100% OF THE TRAINS
ACCESS THE TERMINALS WITHOUT ANY WAITING TIME

Railway Network



WEEKLY SHUTTLES

Marseille-Ludwigshafen: 3

Via Ludwigshafen:

- Munich
- Hamburg Billewerder
- Rotterdam Rsc
- Antwerp
- Duisburg
- Zeebrugge
- Lubeck
- Buna Werke

Marseille Antwerp: 1

Fos-Zeebrugge: 1



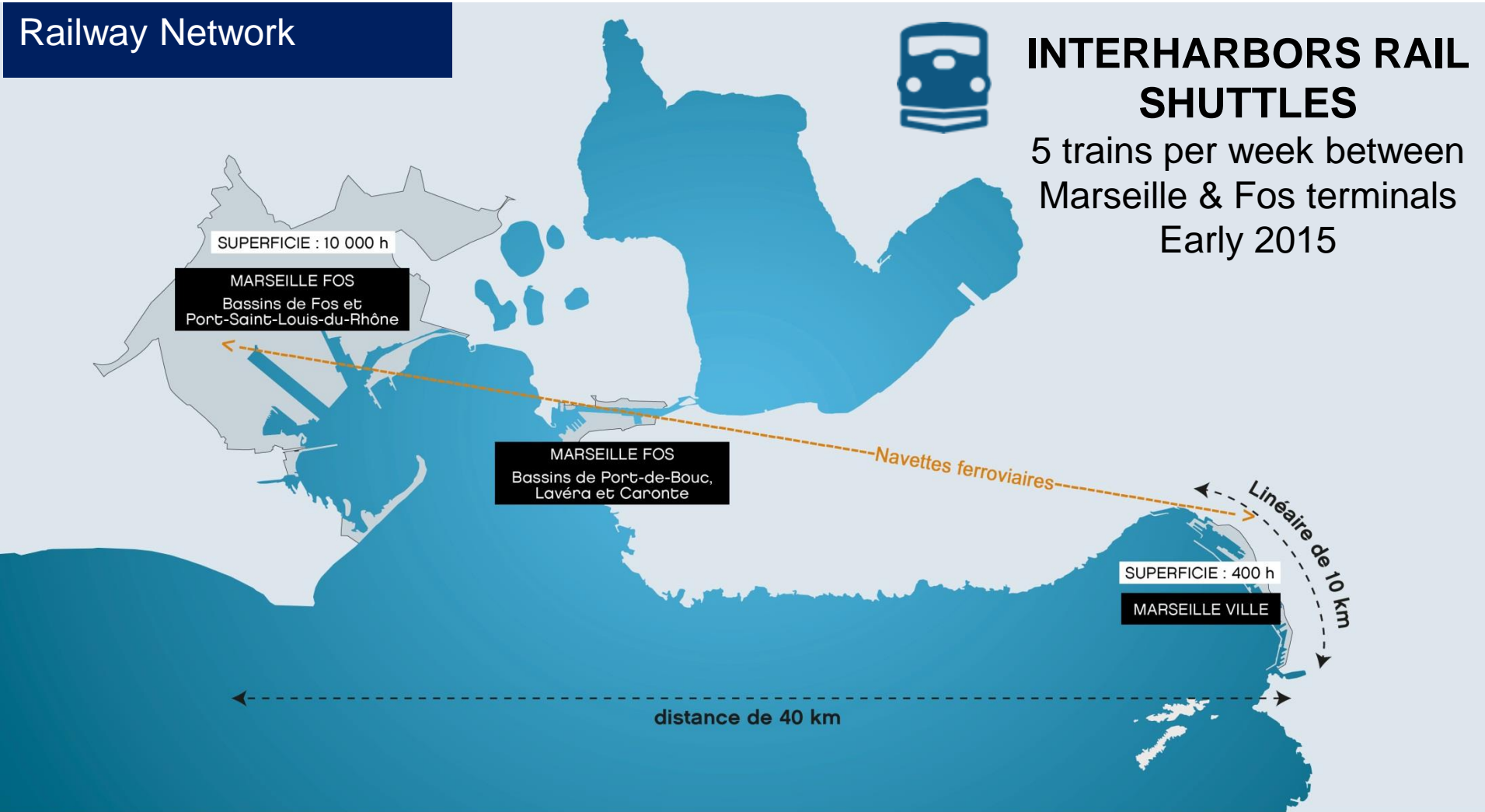
100% OF THE TRAINS
ACCESS THE TERMINALS WITHOUT ANY WAITING TIME

Railway Network



INTERHARBORS RAIL SHUTTLES

5 trains per week between
Marseille & Fos terminals
Early 2015



100% OF THE TRAINS

ACCESS THE TERMINALS WITHOUT ANY WAITING TIME

Inland Waterway Network



A STRATEGIC NETWORK ON THE RHÔNE AND SAONE RIVERS FOR CONTAINERS, BREAKBULK AND LIQUID BULK.



Best TT

Chalon	1/week	A / F
Mâcon	2/week	A / D
Lyon	3/week	A / C
Valence	2/week	A / B

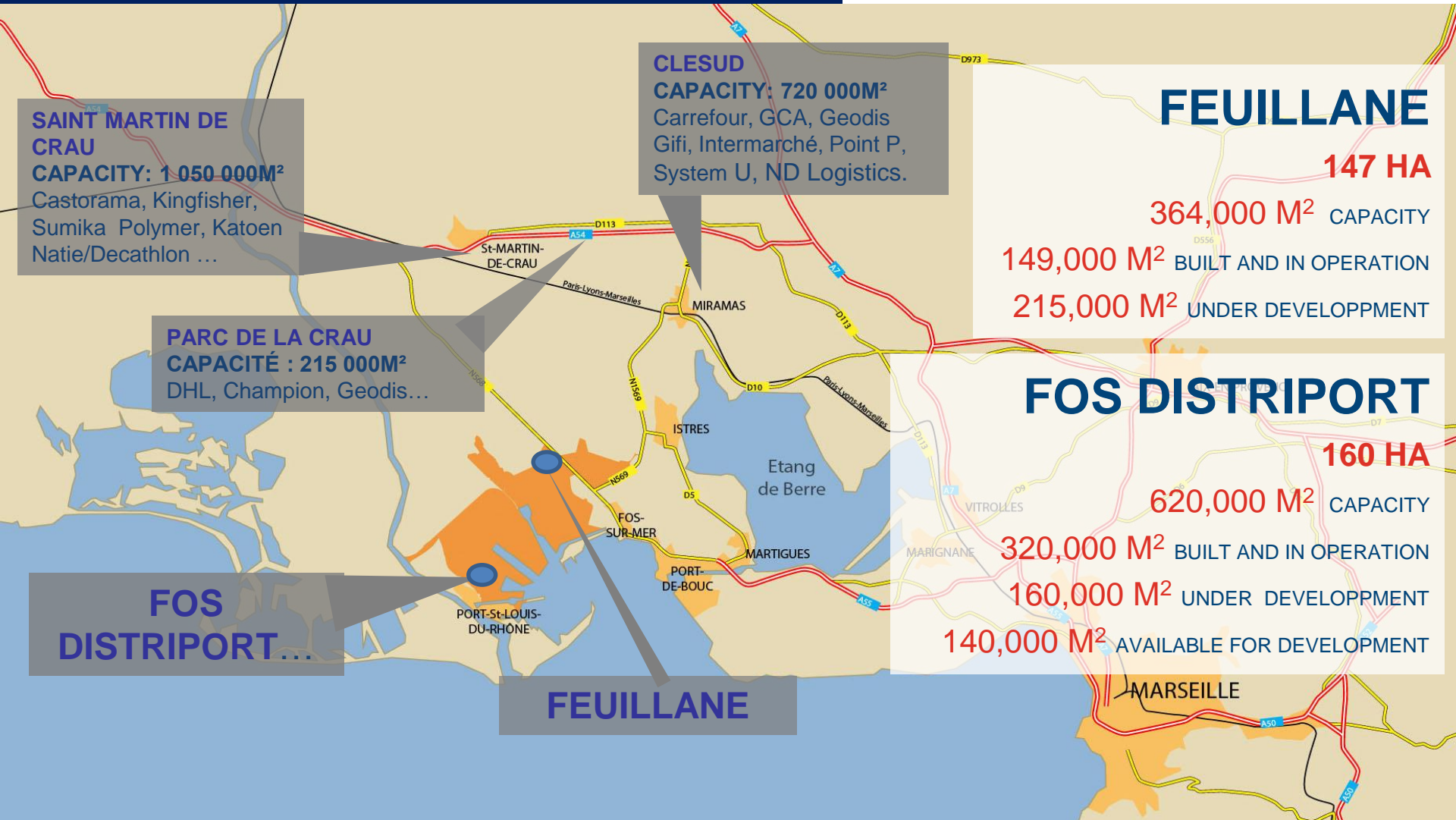
In 2014 : 96 000 TEUs (+22%) - Modal share ≈ 8,4%





Logistics & Distribution in the south...

3 Million sqm available within 30 kms...



SAINT MARTIN DE CRAU
CAPACITY: 1 050 000M²
Castorama, Kingfisher, Sumika Polymer, Katoen Natie/Decathlon ...

PARC DE LA CRAU
CAPACITÉ : 215 000M²
DHL, Champion, Geodis...

CLESUD
CAPACITY: 720 000M²
Carrefour, GCA, Geodis Gifi, Intermarché, Point P, System U, ND Logistics.

FEUILLANE
147 HA
364,000 M² CAPACITY
149,000 M² BUILT AND IN OPERATION
215,000 M² UNDER DEVELOPMENT

FOS DISTRIPOORT
160 HA
620,000 M² CAPACITY
320,000 M² BUILT AND IN OPERATION
160,000 M² UNDER DEVELOPMENT
140,000 M² AVAILABLE FOR DEVELOPMENT

FOS DISTRIPOORT...

FEUILLANE

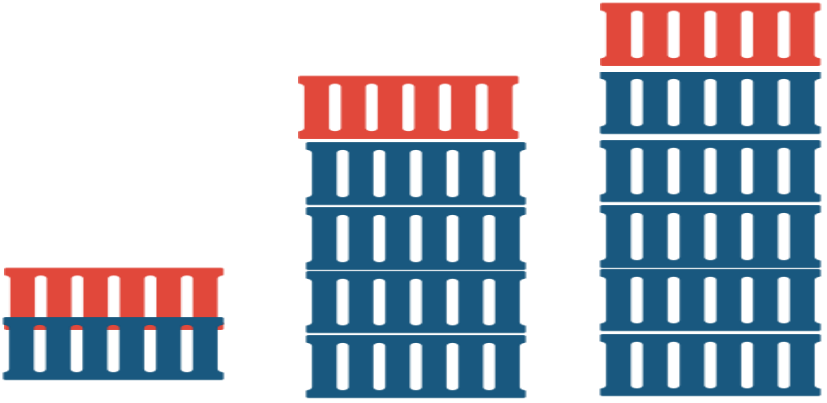
Logistics powered by Majors

IN FOS WE TRUST !

MAISONS DU MONDE
114.000 M²
(84.000/F + 30.000/FD)

MATTEL
40 000 M²

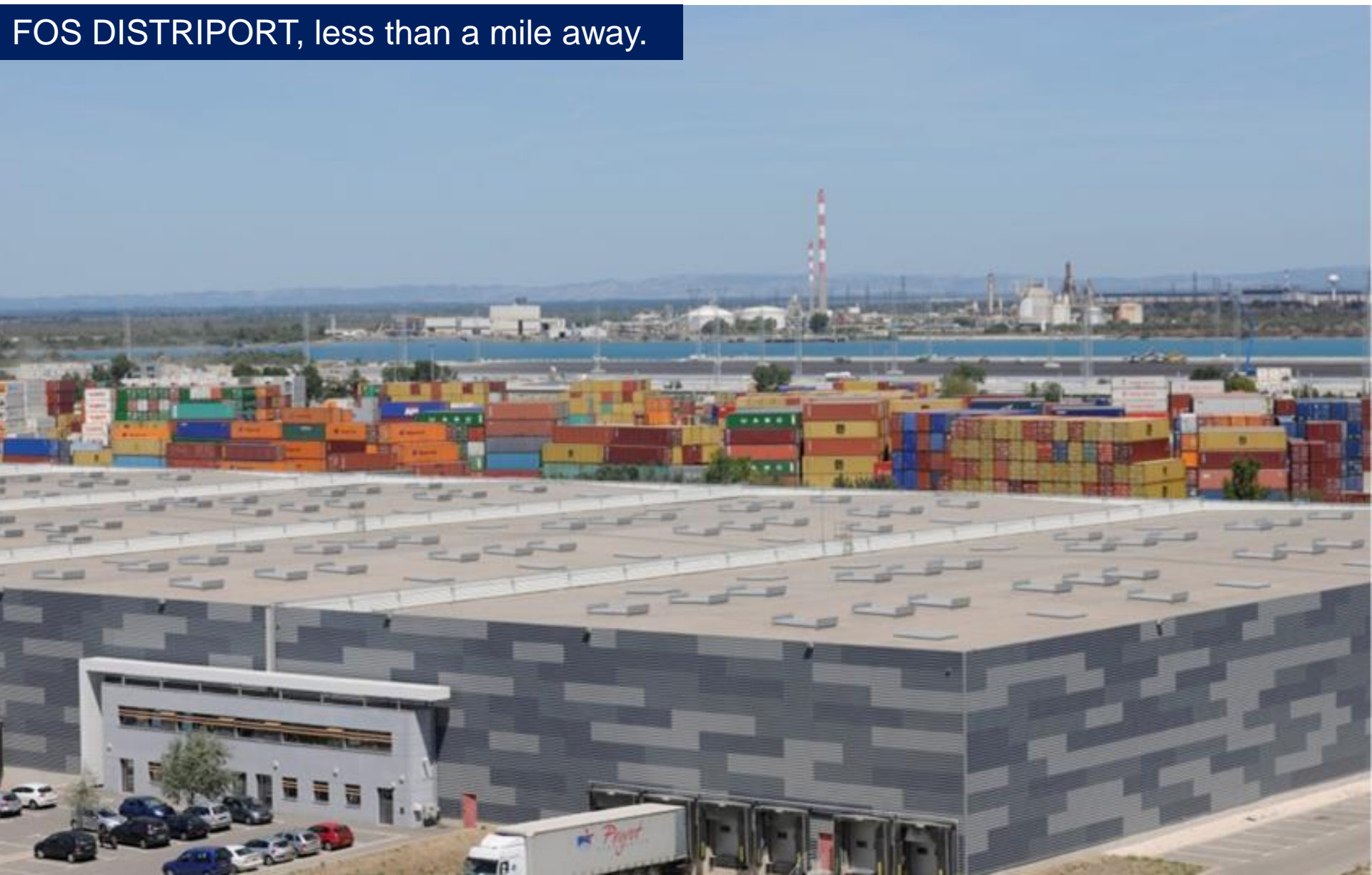
IKEA
65 000 M²



A collection of logos for logistics and supply chain partners, including: SDV, MEDICO VRAC, Weldom, SEAFRIGO, havaianas, CEVA, DB SCHENKER, GEODIS, EURO RAIL, ATLAS, GCA, Nestlé Waters, DISTRIMAG, GONDRAND, Aubert, FLY, TRANSAFOS, and DANONE Eaux France.

International Companies now in Provence: Schenker, Panalpina, Ceva, Khuene & Nagel, Katoen Natie, Coca cola, Office Depot, Otis, Adeo Group, Kingfisher, Darty, Schlecker, Siemens, H&M, Sumika Polymers, Daikin, BASF, IKEA, Mattel, Weldom...

FOS DISTRIPOINT, less than a mile away.



Efficient and paper free port :
Dematerialization on the move

➔ FLUIDITY



RAPID PORT
PASSAGE
FOR TRUCKS



25 MIN

FREE TIME:
EXPORT // IMPORT



MARSEILLE



FOS



2 BORDER
INSPECTION STATIONS
FOR PHYTO &
VETERINARY CONTROLS

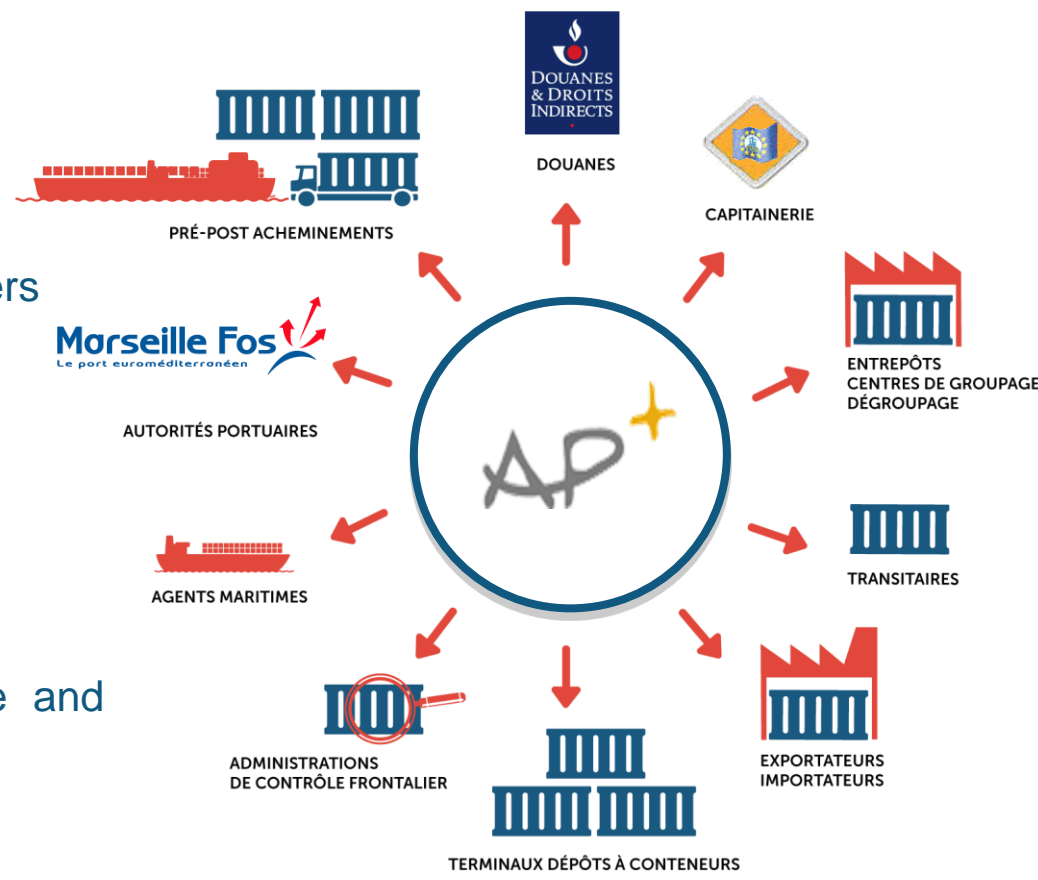


Efficient and dematerialized Port

➔ AN EFFICIENT CARGO COMMUNITY SYSTEM

A successful Public/Private Partnership :

- A « one-stop shop » for the connected players
- Helps in reducing exchange of documents
- Improves the port transit time-frame
- Reduces multiple input of information
- Track and trace: physical, administrative and customs status of the cargo
- Secured exchange of information



An Efficient and dematerialized Port



- AEO LABEL: GREATER KNOWLEDGE OF OPERATORS
- IMPORT CONTROL SYSTEM
- DEMATERIALISED CUSTOMS FORMALITIES



4,5 MIN:
AVERAGE CUSTOMS
CLEARANCE TIME

Facts & Figures – Our Trade Exchange with Turkey



Turkey ↔ Marseille Fos : 7 direct services

Companies	Frequency - Harbors	Ports Called
<u>5 full container services</u>		
• Borchard (Bosphorus)	Weekly Marseille	Istanbul-Gebze-Izmir <i>Via Le Pirée</i> : Mersin export - <i>Via Salerne</i> : Mersin import
• Arkas Line (Asa) (+ Turkon + Seago Line)	Weekly Fos	Istanbul-Gebze-Gemlik-Aliaga <i>Via Istanbul</i> : Samsun -Izmir - <i>Via Gebze</i> : Mersin
• Arkas Line (Sem)	Weekly Fos	Mersin-Iskenderun
• Seago Line	Weekly Fos	Mersin <i>Via Valence</i> : Canakkale
• Msc	Weekly Fos	Istanbul – Gebze –Gemlik-Izmir-Aliaga <i>Via Gioia Tauro</i> : Izkenderun– Antalya– Gemlik -Mersin <i>Via Istanbul</i> : Trabzon – Samsun - <i>Via Le Pirée</i> : Izmir–Aliaga
<u>1 roro service</u>		
• Grimaldi	Weekly Fos	Derince-Gemlik
<u>1 car-carrier service</u>		
• Neptune Shipping	Every 10 days Marseille/Fos	Gemlik-Derince-Yenikoy

Turkey ↔ Marseille Fos : 7 transshipment services

Companies	Frequency - Harbors	Ports Called
<u>6 full container services</u>		
• Hyundai	Weekly Fos	<u>Via Port Saïd</u> : Istanbul – Mersin – Gemlik
• Apl	Weekly Fos	<u>Via Port Saïd</u> : Istanbul - Izmir
• Cma-Cgm	Weekly Fos	<u>Via Malte</u> : Izmir- Mersin - Istanbul – Gebze - Trabzon <u>Via Valence</u> : Gemlik <u>Via Port Saïd or Malta</u> : Izmit
• Yang Ming	Weekly Fos	<u>Via Port Saïd</u> : Mersin – Istanbul –Izmir
• Zim	Weekly Fos	<u>Via Haïfa</u> : Istanbul– Izmir - Mersin - Izmit –Antalya
• Borchard	Weekly Fos	<u>Via Haïfa</u> : Mersin
<u>1 conro service</u>		
• Grimaldi	1/14 days Marseille	<u>Via Salerno</u> : Izmir – Mersin – Gemlik – Yenikoy

Facts & Figures – Our Trade Exchange

TEUS	2011	2012	2013
Import	23 477	27 387	29 396
Export	15 601	21 058	25 350
TOTAL	39 078	48 445	54 746

TEUS	2013	2014	% evol
(Jan to Nov)			
Import	26 915	31 122	+ 16%
Export	23 211	23 205	- 0%
TOTAL	50 126	54 327	+ 8%

Trailers	2011	2012	2013
Import	870	0	5
Export	867	2	2
TOTAL	1737	2	7

Trailers	2013	2014	% evol
(Jan to Nov)			
Import	5	8	+ 60%
Export	0	6	-
TOTAL	5	14	+ 180%

New Cars.	2011	2012	2013
Import	97 035	77 240	77 583
Export	22 807	20 925	13 830
TOTAL	119 842	98 165	91 413

New Cars	2013	2014	% evol
(Jan to Nov)			
Import	69 809	37 783	- 46%
Export	12 653	7 767	- 39%
TOTAL	82 462	45 550	- 45%

Facts & Figures – To Summarize...

**General Cargo has increased consistently over the past years by 6% since 2003,
A buoyant increase in our trade exchange for containers (13 % in 2013)**

Breakbulk has increased by 60 % in 2013 / 2012.

New Cars, there is room for improvement.

To Conclude...



Ambition and Strategy : Win back market shares

■ A Port on the move: thanks to its regained reliability, a promising future.

■ CMA-CGM, MSC, DANONE, CEVA LOGISTICS, WELDOM, MAISON DU MONDE, AUBERT, IKEA, MATTEL, TOTAL, SHELL, LAFARGE, DECATHLON ... have chosen Fos for their logistics and have invested heavily in the port perimeter.

■ A central geo-strategic location between Europe and Africa, offering daily departures to North Africa, Med and West Africa.



Thank you for your attention !

