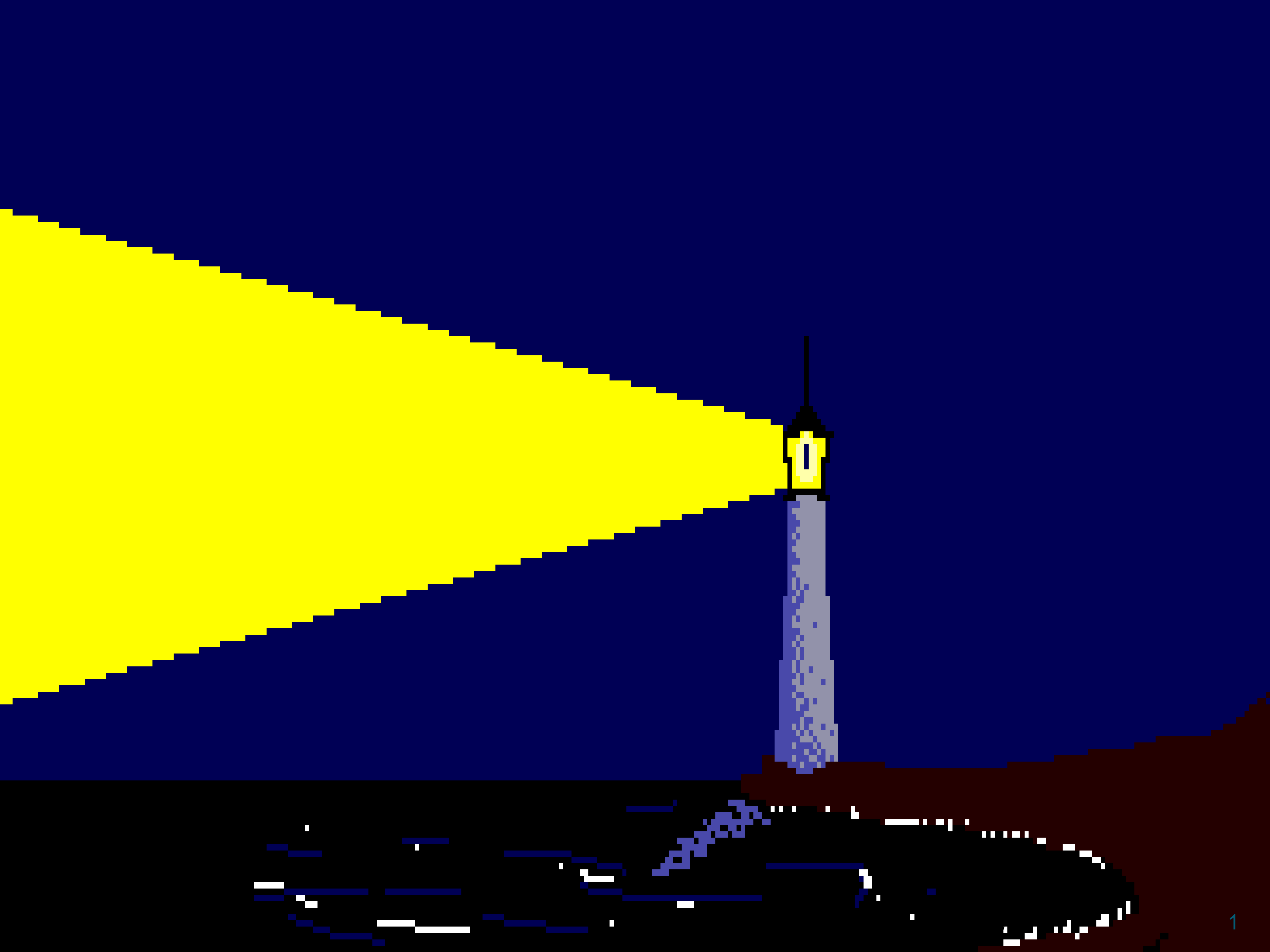
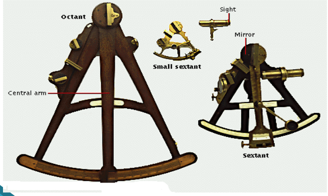


INTRODUCTION

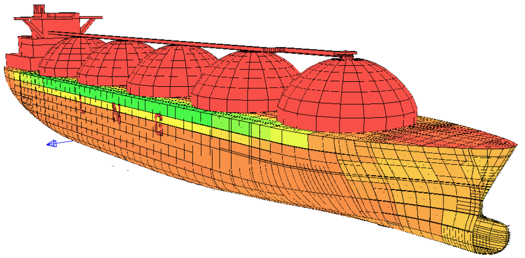
The Government of Jordan has sought further expansion of the infrastructure facilities in Aqaba. The deal with the UAE investor, Al Ma’abar Co., paved the way for the construction of a new port at the southern tip of Aqaba to replace the existing one.

Maritime activity in Aqaba depends on the attractiveness of the port as a destination for international shipping lines. Among the notable container shipping lines currently utilising the Port of Aqaba are international companies such as PIL,CMA, MSC ,APL and Maersk. International shipping lines are represented by local shipping agents that handle the logistics of delivery to and from Aqaba.

Locally, the shipping agents are represented by the Jordan Shipping Association (JSA), which was initially established as the "Shipping Agents Committee" on October 11th, 1978. It was officially registered, in December 2010, as the Jordan Shipping Association.

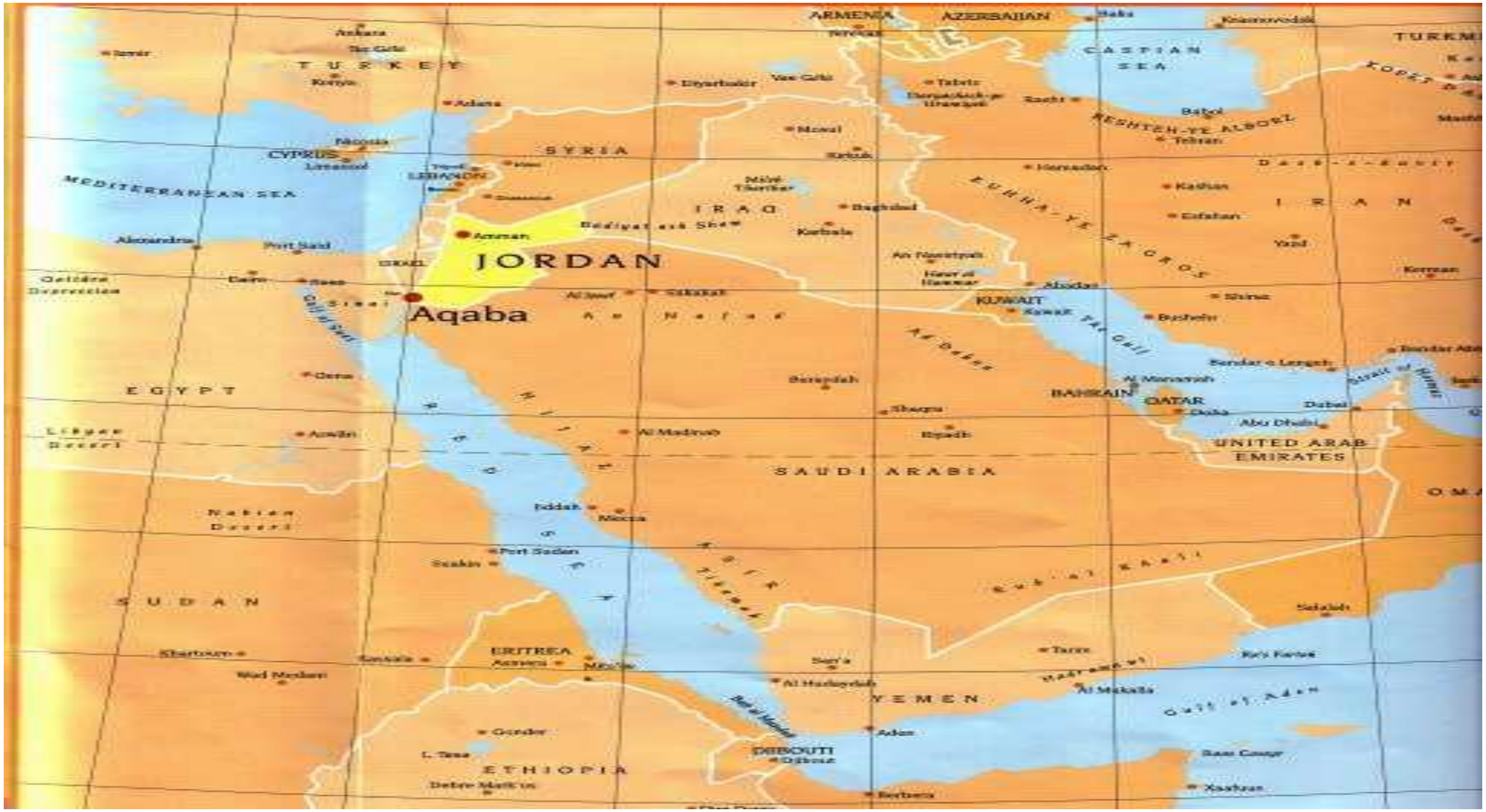


The mission of the JSA is to promote the development and growth of maritime shipping via the Kingdom's national Port of Aqaba. This is done by mobilizing business skills and concepts in public and private sector partnerships; providing high quality services; partnering with the Government to create an attractive business environment for ship owners/operators /charterers; and assisting members to following the highest professional standards.



Maritime cluster Jordan

Location of Jordan



Points to be considered to establish the Maritime Cluster in Jordan

Concentrate on the following:

1- Establishment of advance Legislation System .(ASEZA)

2- Construction of developed ports.(NEW PORT)

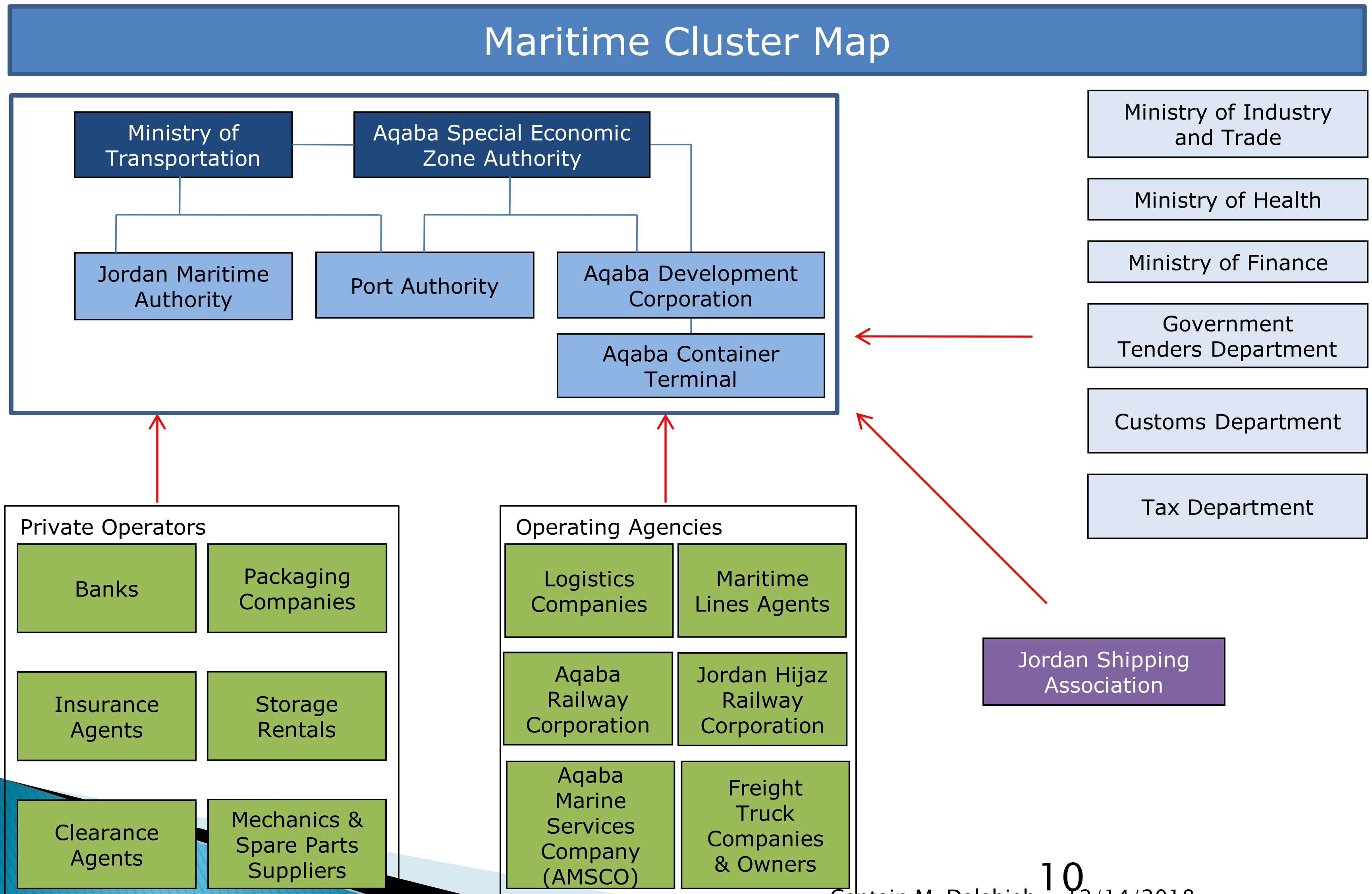
3- Development of the Marine Economic Strategy.(JMC)

4- Qualified marine employees .(MARITIME Academy)

5- Development of Infrastructure and Communication.(ADC)

6- Creating the Spirt of Innovation(WMU)

Maritime Cluster

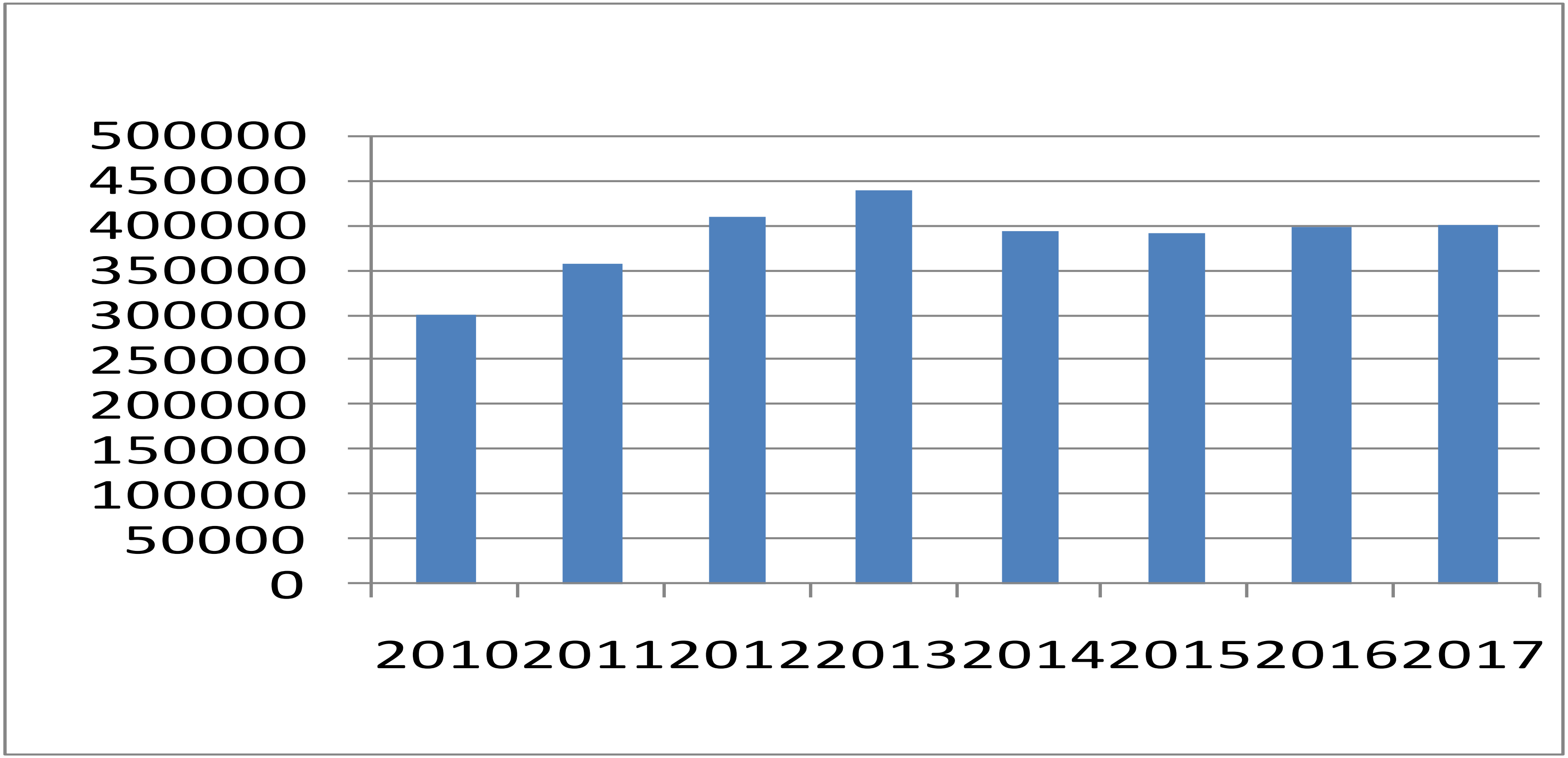


Handling of cargo at Aqaba Port 2010-2017

Aqaba Port Traffic, 2010-2017

Year	2010	2011*	2012	2013	2014	2015	2016	2017
No. of Ships (Tourist and Passenger Ships)	2,902	2,892	3,083	2.885	2693	2676	2435	2305
Import (Ton)	8,795,570	10.208427	11.943,770	11.784.359	13.843.527	13.148.647	12.218.501	11.734.272
Export (Ton)	8,055,688	8,975,169	7,411,012	4.531.249	5.201.269	5.233.379	4.547.560	5.589.718
Total (Ton)	16,851,258	19,183,596	19,354,782	16.315.608	19.044.796	18.382.026	16.766.061	17.323.990

Containers discharged at ACT

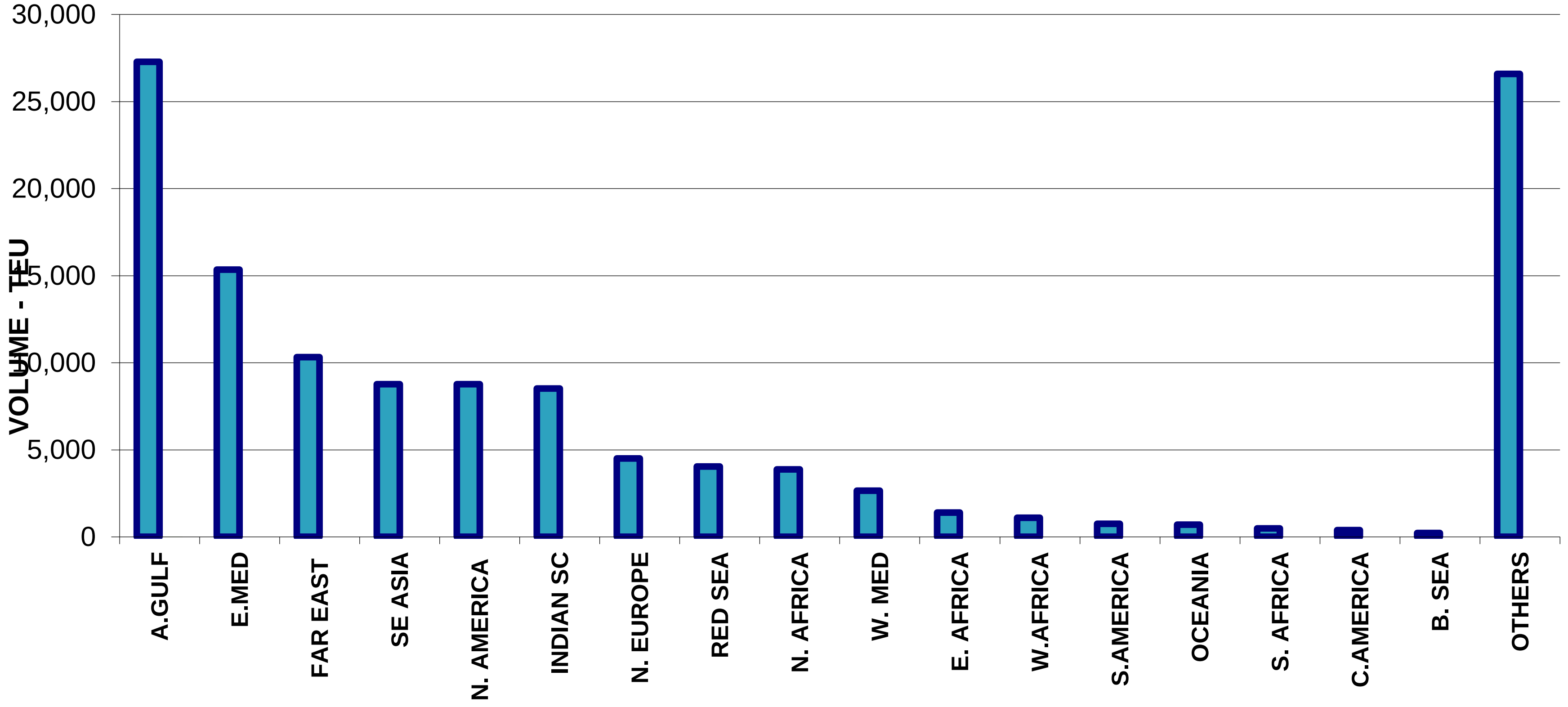


Import & Export Containers, 2010-2017

	2010	2011	2012	2013	2014	2015	2016	2017
Imports containers (TEU)	**302,400**	**359,078**	**410,683**	**440.031**	**394.687**	**378.212**	**399.29 9**	**401.938**
Imports (20)	**88,302**	**101,616**	**120,903**	**130.789**	**124.159**	**113.056**	**115.33 7**	**113.568**
Imports (40)	**107,049**	**128,731**	**144,890**	**154.621**	**135.264**	**132.579**	**141.98 1**	**144.005**
Exports containers (TEU)	**303,259**	**346,570**	**406,751**	**432.779**	**386.604**	**380.007**	**393542**	**394.149**
Total –TEU_	**605,659**	**705,648**	**817,434**	**872.810**	**781.291**	**758.219**	**792.84 1**	**796.087**

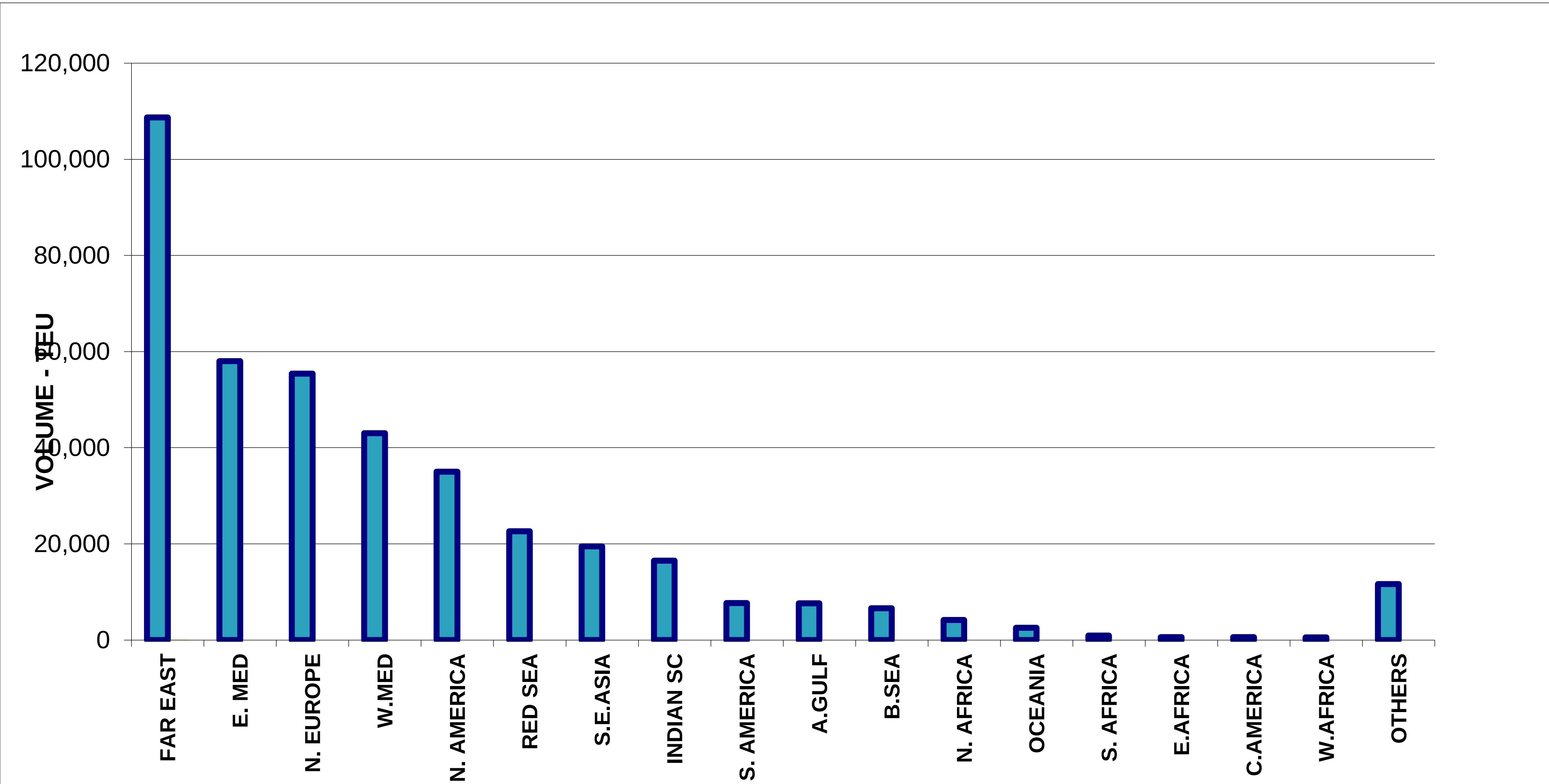
ACT EXPORT STATISTICS PER DESTINATION / FULL YEAR 2017

DESTINATION	A.GULF	E.MED	FAR EAST	SE ASIA	N. AMERICA	INDIAN SC	N. EUROPE	RED SEA	N. AFRICA	W. MED	E. AFRICA	W.AFRICA	S.AMERICA	OCEANIA	S. AFRICA	C.AMERICA	B. SEA	OTHERS	TOTAL
TEUS	27,285	15,345	10,329	8,775	8,769	8,530	4,508	4,040	3,873	2,657	1,394	1,099	758	705	489	390	224	26,597	125,767
%	21.6%	12.2%	8.2%	6.9%	6.9%	6.7%	3.5%	3.2%	3.0%	2.1%	1.1%	0.8%	0.6%	0.5%	0.3%	0.3%	0.1%	21.1%	100.0%



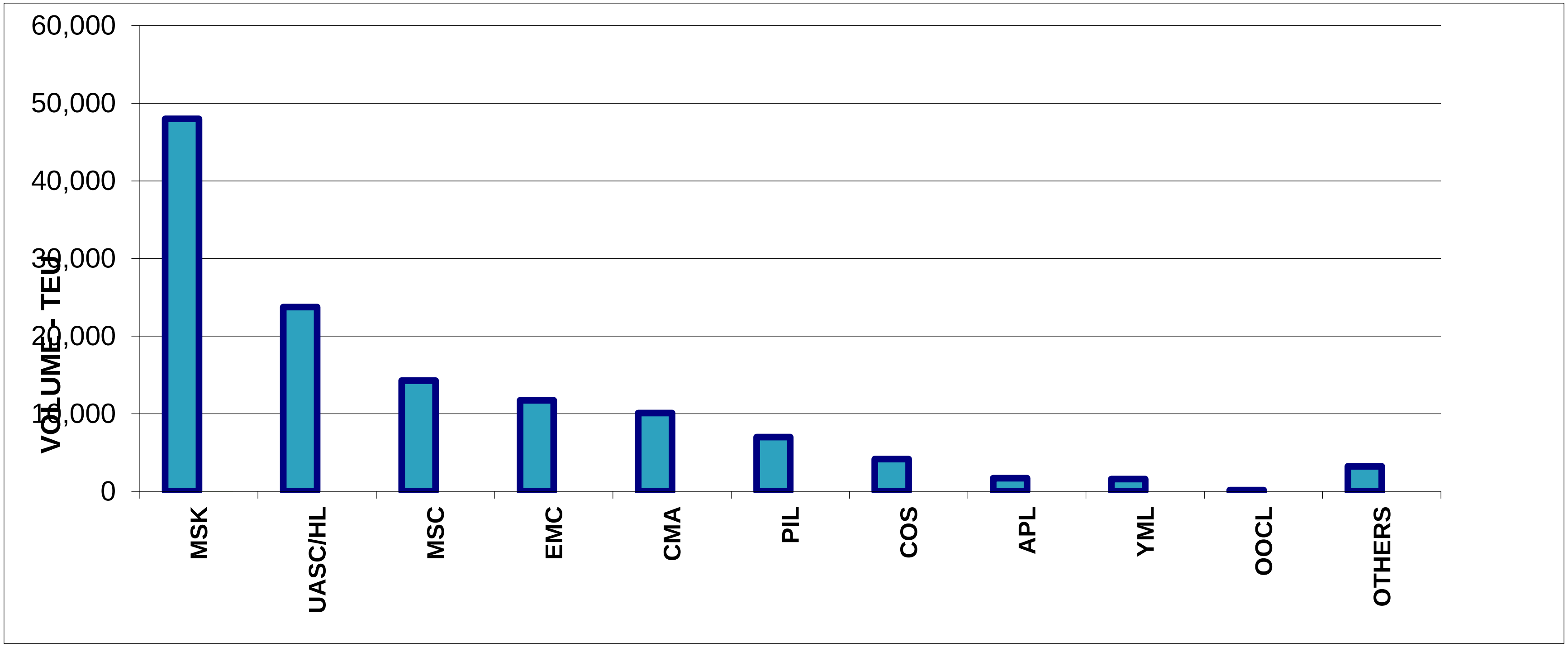
ACT IMPORT STATISTICS PER ORIGIN / FULL YEAR 2017

ORIGIN	FAR EAST	E. MED	N. EUROPE	W.MED	N. AMERICA	RED SEA	S.E.ASIA	INDIAN SC	S. AMERICA	A.GULF	B.SEA	N. AFRICA	OCEANIA	S. AFRICA	E.AFRICA	C.AMERICA	W.AFRICA	OTHERS	TOTAL
TEUS	108,721	58,002	55,428	43,007	35,004	22,611	19,467	16,500	7,711	7,632	6,615	4,167	2,541	939	612	584	558	11,660	401,759
%	27.0%	14.4%	13.7%	10.7%	8.7%	5.6%	4.8%	4.1%	1.9%	1.8%	1.6%	1.0%	0.6%	0.2%	0.1%	0.1%	0.10%	2.9%	100.0%



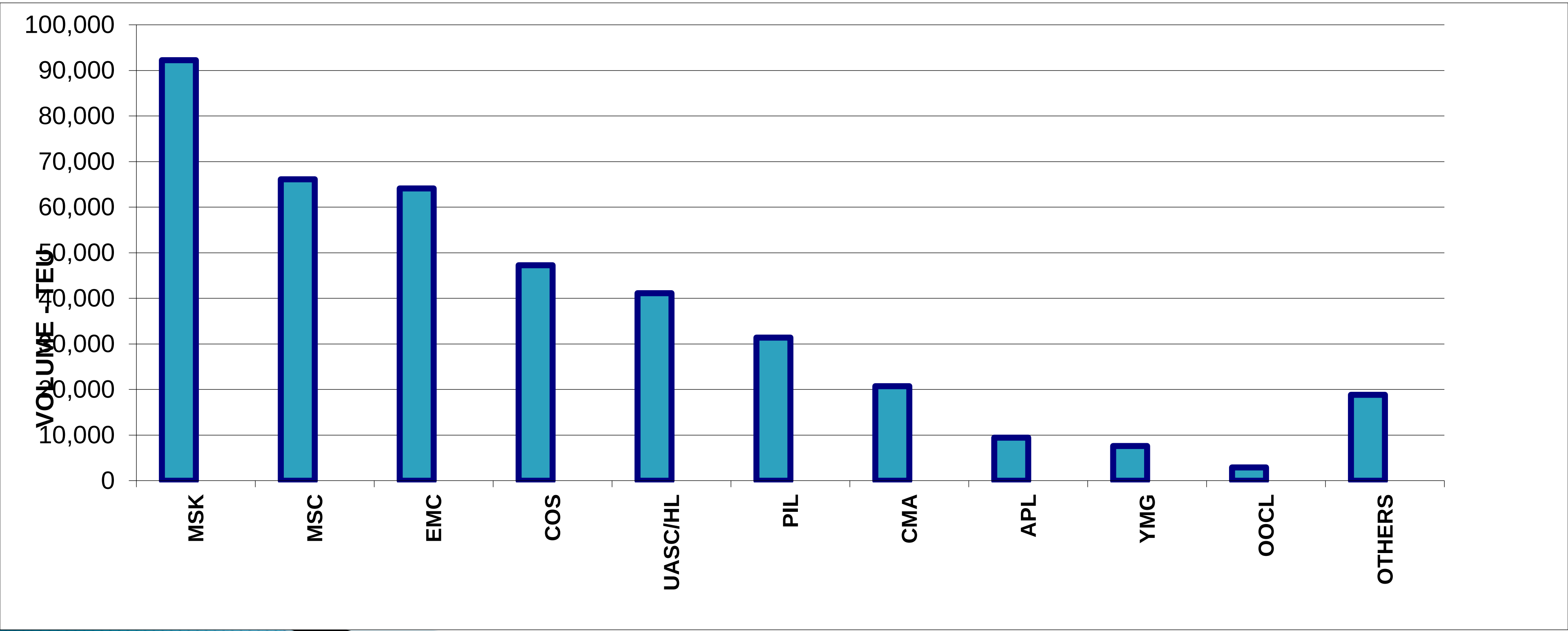
LINES EXPORT STATISTICS FULL YEAR 2017

LINE	MSK	UASC/HL	MSC	EMC	CMA	PIL	COS	APL	YML	OOCL	OTHERS	TOTAL
TEUS	48,000	23,759	14,257	11,730	10,112	6,998	4,182	1,722	1,591	180	3,236	125,767
MARKET %	38.1%	18.8%	11.3%	9.3%	8.0%	5.5%	3.3%	1.3%	1.2%	0.1%	2.50%	100.0%



LINES IMPORT STATISTICS FULL YEAR 2017

LINE	MSK	MSC	EMC	COS	UASC/HL	PIL	CMA	APL	YMG	OOCL	OTHERS	TOTAL
TEUS	92,242	66,132	64,114	47,246	41,130	31,398	20,728	9,447	7,624	2,891	18,807	401,759
MARKET %	22.9%	16.4%	15.9%	11.7%	10.2%	7.8%	5.1%	2.3%	1.8%	0.7%	4.6%	100%



Transit Goods Imported via Aqaba by Destination, 2010-2017 (Tons)

Destination	2010	2011	2012	2013	2014	2015	2016	2017
Iraq	111,993	141,330	198,124	182.394	88.422	26.957	00.000	00.00
Syria	53,127	29,625	23,208	29.886	38.625	13.343	00.000	00.00
Saudi Arabia	147,356	155,284	161,277	147.160	121.234	103.021	74.849	74.830
Lebanon	2,131	2,610	2,829	2.022	2.315	1.478	00.000	00.00
Kuwait	12,773	18,228	23,123	17.143	73.529	80.955	46.019	8.293
Yemen	0	0	0	0	0	0	00.000	00.00
UAE	4,478	6,576	7,200	10.915	11.949	8.181	6.084	1.882
Others	267,082	275,357	257,843	275.305	230.769	167.146	55.305	64.433
Total	599,213	629,010	673,604	664.826	636.843	401.481	182.257	149.438

Jordan Economy

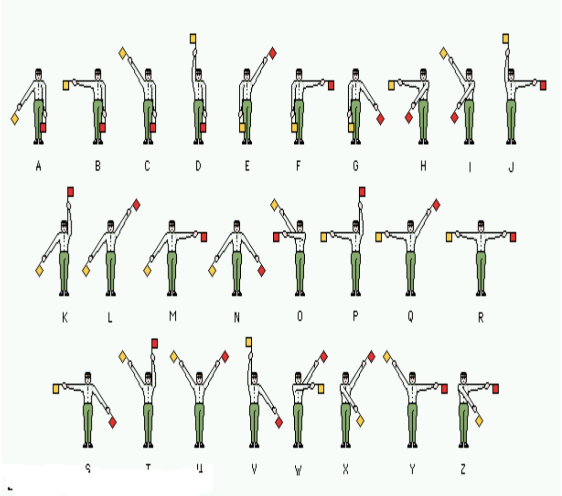
Summary of Economic Indicators

- **GDP Real growth:**
- 2011 2.6%
- 2012 2.7%
- 2013 2.8%
- 2014 3.1%
- 2015 2.4%
- 2016 2.0%
- 2017 2.0%

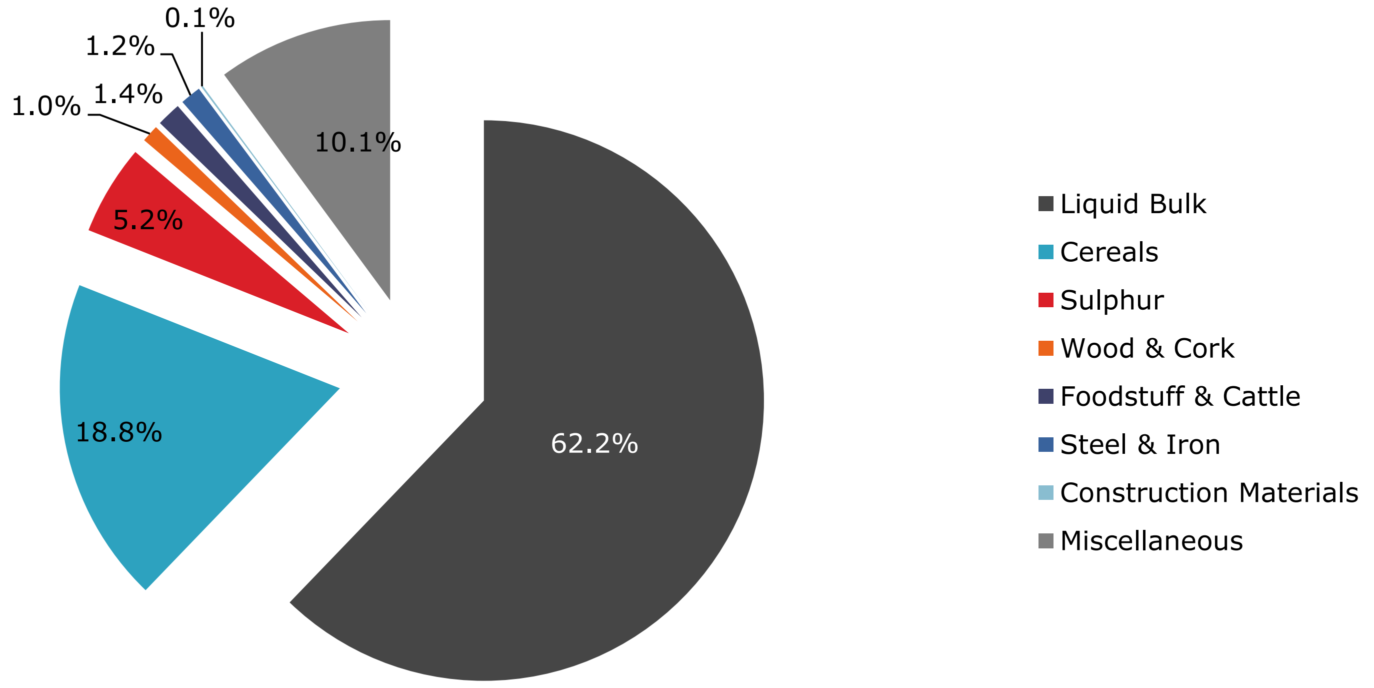
Contribution of the Transport Sector and communication to the GDP (

Source: Department of Statistics. Statistical Database 2009.

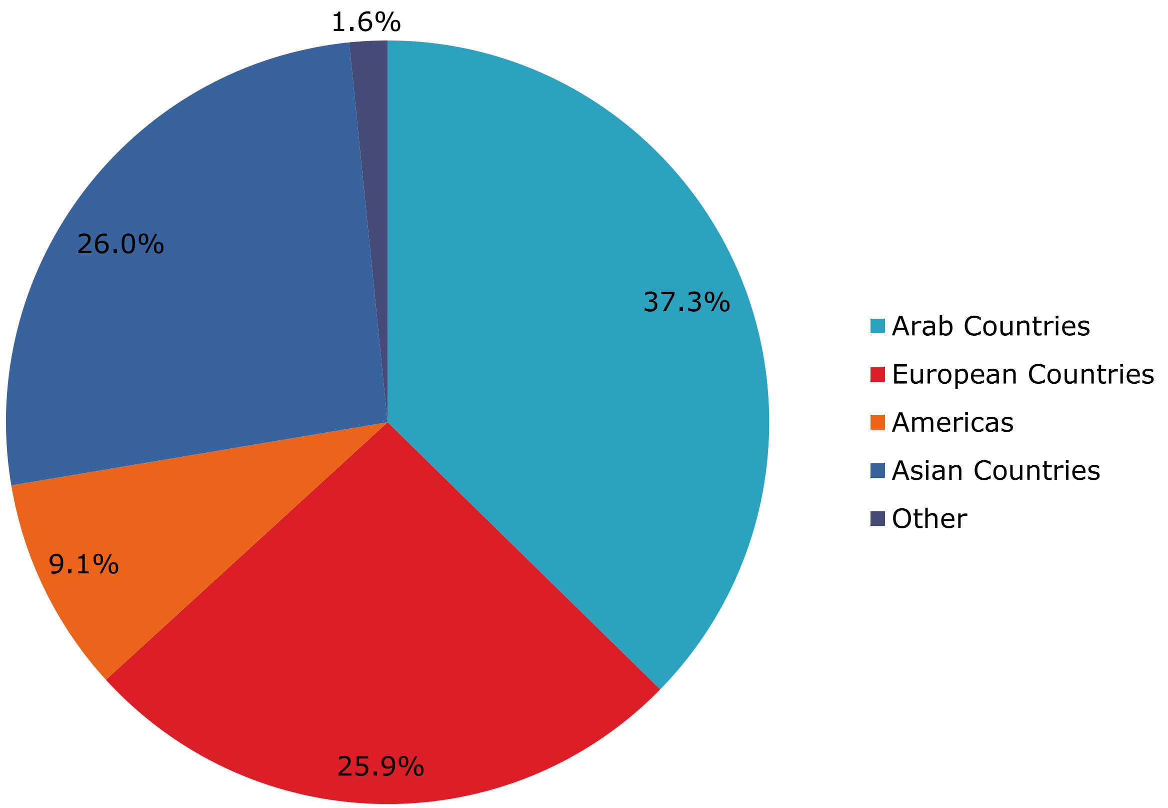
Year	Percentage
2009	**11.9%**
2010	**12,2%**
2011	**11,8%**
2012	**12.0%**
2013	**12,1%**
2014	**13,8%**
2015	**14.9%**
2016	**12.0%**
2017	**14.2%**



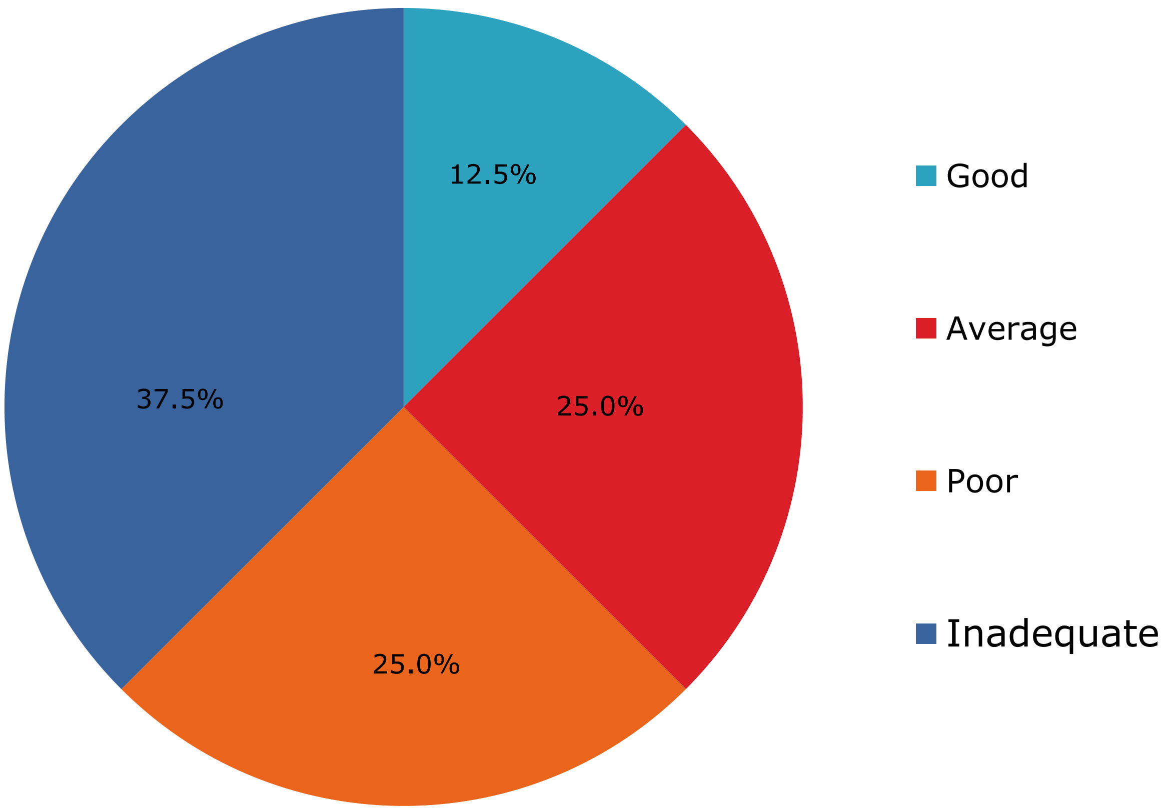
Imports through Aqaba



Geographic Distribution of Imports



Availability of Quality Human Resources in the Maritime Sector



SWOT Matrix of Maritime Cluster in Jordan

Strengths

Weaknesses

Opportunities

Threats

SWOT Analysis

❖ Among the strengths of Jordan's maritime cluster are:
- country's relative stability as compared to neighboring countries, and thus the stability of Jordan's transport infrastructure;
- expected increased capacity of maritime trade as a result of the development of the new port;
- adequacy of supporting infrastructure, namely the road network;
- negligible waiting times;
- Sole Jordanian maritime gateway for cargo
- Excellent draft with comparing with other ports
- Excellent Maritime Academy

SWOT Analysis

- Few of the sector's weaknesses include:
  - difficulty in attracting quality human resources;
  - higher price of maritime services at the Port of Aqaba relative to competing ports including customs tariffs, port handling fees, storage service costs, and compulsory Suez Canal fees than in neighboring countries as well as longer trips;
  - High containers yard utilization which will limit terminal capacity
  - high price of diesel.
  - Strikes
  - Limit transshipment potential as Aqaba is in the closed gulf

SWOT Analysis

The opportunities are summarized below:

❖ There are several opportunities for the Jordan maritime sector to exploit including:
- taking advantage of the situation in Syria as they will need a lot of cargo to recover from the recent war
- reducing port tariff and port handling fees to attract cargo destined for Syria ;
- and the upcoming phases of the Aqaba Logistics Village, which are likely to improve the overall quality of the maritime industry.

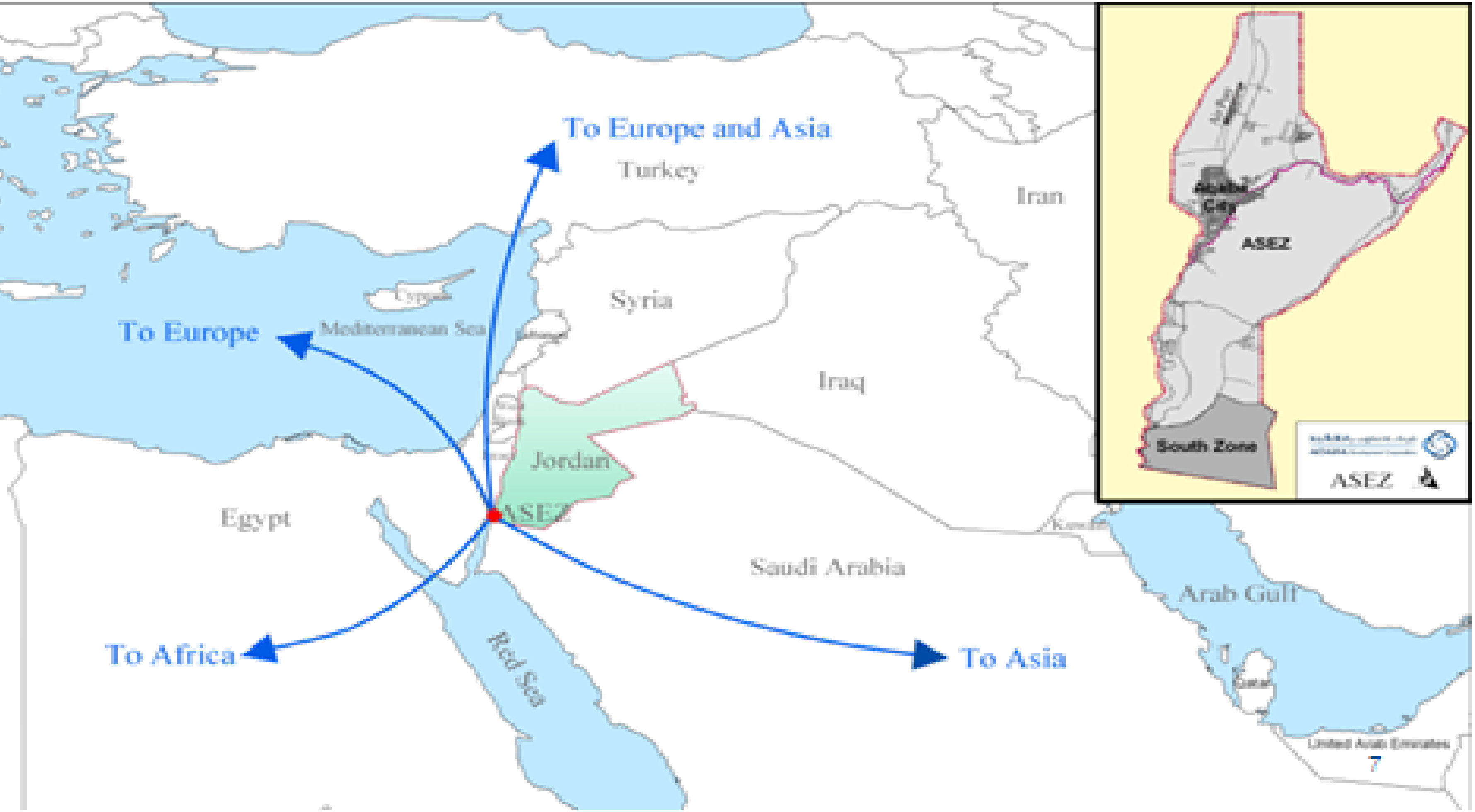
SWOT Analysis

- maritime sector threats to be aware of are as follow:
  - loss of demand ,as neighboring countries offering faster or cheaper and reduce storage fees
  - inconsistent government policies;
  - Continue of labor and truck drivers strikes

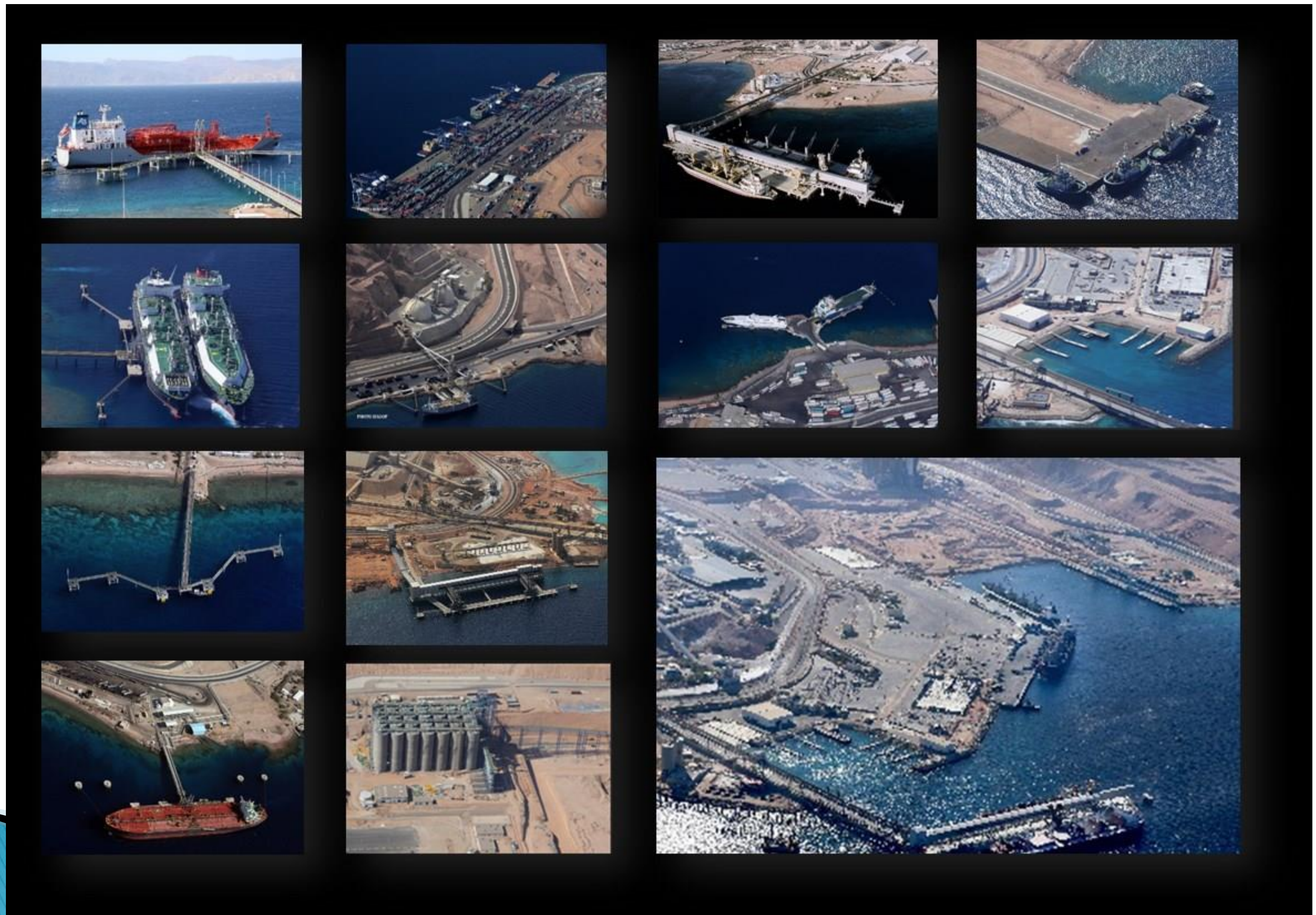
Where is Jordan ???????????????????????????????????


ICELAND
Reykjavik
Faroe Islands (DEN.)
Tórshavn
NORWAY
Oslo
SWEDEN
Stockholm
FINLAND
Helsinki
Tallinn
EST.
Riga
LAT.
LITH.
Vilnius
Minsk
BELARUS
RUSSIA
Arkhangel'sk
Saint Petersburg
Moscow
Yaroslavl'
Nizhniy Novgorod
Kazan'
Izhevsk
Perm'
Yekaterinburg
Tyumen'
Chelyabinsk
Omsk
Tomsk
Novosibirsk
Krasnoyarsk
Barnaul
Irkutsk
Ufa
Ul'yanovsk
Samara
Saratov
Orenburg
Voronezh
Volgograd
Rostov
Astrakhan'
Atyraū
Aqtaū (Aktau)
KAZAKHSTAN
Astana
Qaraghandy (Karaganda)
Lake Balkhash
Almaty
Bishkek
KYRGYZSTAN
Tashkent
UZBEKISTAN
TURKMENISTAN
Ashgabat
Dushanbe
TAJIKISTAN
Ürümqi
Kashi
Rockall (U.K.)
North Sea
DENMARK
Copenhagen
UNITED KINGDOM
Glasgow
Leeds
Belfast
Dublin
IRELAND
Birmingham
London
Celtic Sea
Amsterdam
NETH.
Brussels
BELGIUM
Hamburg
Berlin
GERMANY
Cologne
Frankfurt
Munich
Warsaw
Łódź
POLAND
Kraków
Prague
CZECH REP.
Vienna
AUSTRIA
SLOVAKIA
Bratislava
Budapest
HUNGARY
L'viv
Kyiv
UKRAINE
Kharkiv
Donets'k
Homyel'
MOLDOVA
Chişinău
Odesa
ROMANIA
Bucharest
Belgrade
Sofia
BULGARIA
Zagreb
Sarajevo
Paris
FRANCE
Bordeaux
Lyon
Toulouse
Marseille
MONACO
SWITZ.
Bern
Milan
Turin
Genoa
ITALY
Rome
Naples
Palermo
Sicily (IT.)
Corsica (FR.)
Sardinia (IT.)
VATICAN CITY
Bay of Biscay
Bilbao
ANDORRA
Barcelona
Madrid
SPAIN
Valencia
Sevilla
Málaga
Porto
PORTUGAL
Lisbon
BALEARIC ISLANDS (SP.)
Algiers
Constantine
Oran
Ceuta (SP.)
Melilla (SP.)
Fès
Rabat
Casablanca
Marrakech
MOROCCO
MADEIRA ISLANDS (PORT.)
CANARY ISLANDS (SP.)
Tunis
TUNISIA
MALTA
Valletta
Tripoli
Benghazi
Mediterranean Sea
ALGERIA
LIBYA
Tirana
ALB.
GREECE
Athens
Crete
Black Sea
Istanbul
Bursa
İzmir
Ankara
Konya
Adana
TURKEY
GEORGIA
Tbilisi
ARMENIA
Yerevan
AZER.
Baku
Tabriz
Mosul
Erbil
Aleppo
SYRIA
Damascus
Nicosia
CYPRUS
LEBANON
Jerusalem
Amman
JORDAN
IRAQ
Baghdad
Al Başrah
KUWAIT
Kuwait
Tehran
Qom
Kermanshah
Eşfahān
Ahvāz
IRAN
Shīrāz
Zāhedān
Mashhad
Herāt
Kabul
AFGHANISTAN
Kandahār
Peshāwar
Islamabad
Lahore
Faisalābād
Multān
Quetta
PAKISTAN
Hyderābād
Karāchi
Alexandria
Cairo
Al Jīzah
EGYPT
Aswān
SAUDI ARABIA
Riyadh
Medina
Mecca
BAHRAIN
Manama
QATAR
Doha
Persian Gulf
Abu Dhabi
UNITED ARAB EMIRATES
Muscat
OMAN
Gulf of Oman
YEMEN
Sanaa
Aden
Gulf of Aden
Socotra (YEMEN)
Arabian Sea
ERITREA
Asmara
DJIBOUTI
Djibouti
Hargeysa
Addis Ababa
ETHIOPIA
SOMALIA
Port Sudan
Kassala
Omdurman
Khartoum
SUDAN
Juba
CHAD
N'Djamena
CENTRAL AFRICAN REPUBLIC
Bangui
CAMEROON
Douala
Yaoundé
EQUATORIAL GUINEA
Malabo
NIGER
Niamey
NIGERIA
Kano
Abuja
Ogbomoso
Ibadan
Lagos
BENIN
TOGO
Porto-Novo
Lomé
GHANA
Accra
CÔTE D'IVOIRE
Yamoussoukro
Abidjan
LIBERIA
Monrovia
SIERRA LEONE
Freetown
GUINEA
Conakry
GUINEA-BISSAU
Bissau
THE GAMBIA
Banjul
Dakar
SENEGAL
MAURITANIA
MALI
Tombouctou
Bamako
BURKINA FASO
Ouagadougou
INDIA
New Delhi
Āgra
Jaipur
Kānpur
Lucknow
Patna
Ahmadābād
Bhopāl
Indore
Sūrat
Nāgpur
Jamshedpur
Kolkata
Mumbai
Pune
Hyderābād
Vishākhapatnam
Bengaluru (Bangalore)
Chennai
Calicut
Coimbatore
Madurai
Cochin
LAKSHADWEEP (INDIA)
Laccadive Sea
Bay of Bengal
Colombo
SRI LANKA
Male
MALDIVES
NEPAL
Kathmandu
BHUTAN
Thimphu
Lhasa
BANGLADESH
Dhaka
Khulna
Chittagong
1972 Line of Control
Line of Actual Control
Indian claim

الموقع الجغرافي لموانئ العقبة

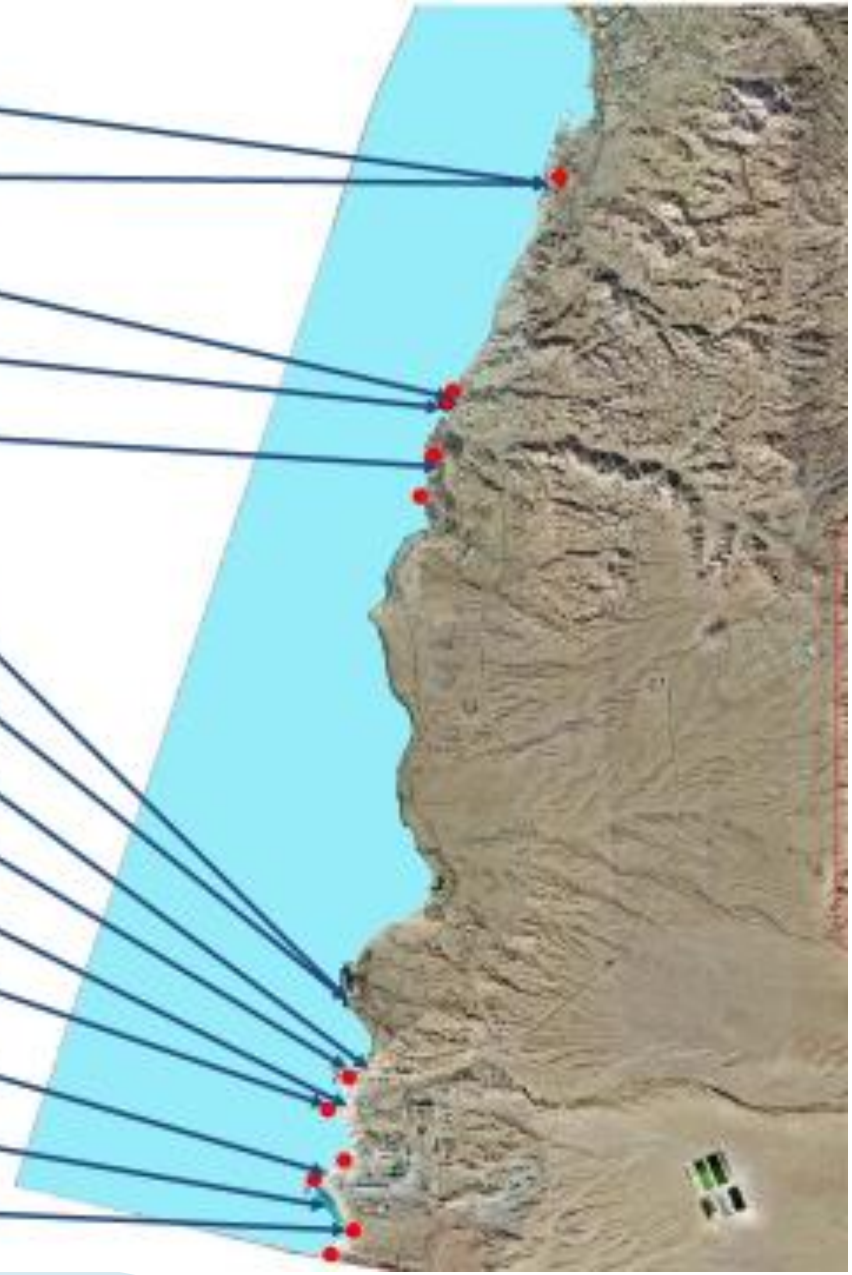


تطور الموانئ في الاردن



PORTS COMMUNITY

- Cruise ship terminal
- Main Port (will be relocated)
- Middle Port
- Container Terminal
- Passenger Terminal
- Additional berth
- Oil Export
- LPG Jetty
- Oil Jetty
- Miscellaneous liquids jetty
- LNG Terminal & Tug Jetty
- New Phosphate Terminal
- Industrial Terminal
- Aqaba New Port



CRUISE VESSEL BERTHS – MARSA ZAYED

Period
2016-2018

Stage
Design

Capacity
2 cruise/Day
3000 Pax
/Cruise

Developer
Al-Maabar

Project Value
50 MJOD

Financing
Al-Maabar

No. of Berths
2

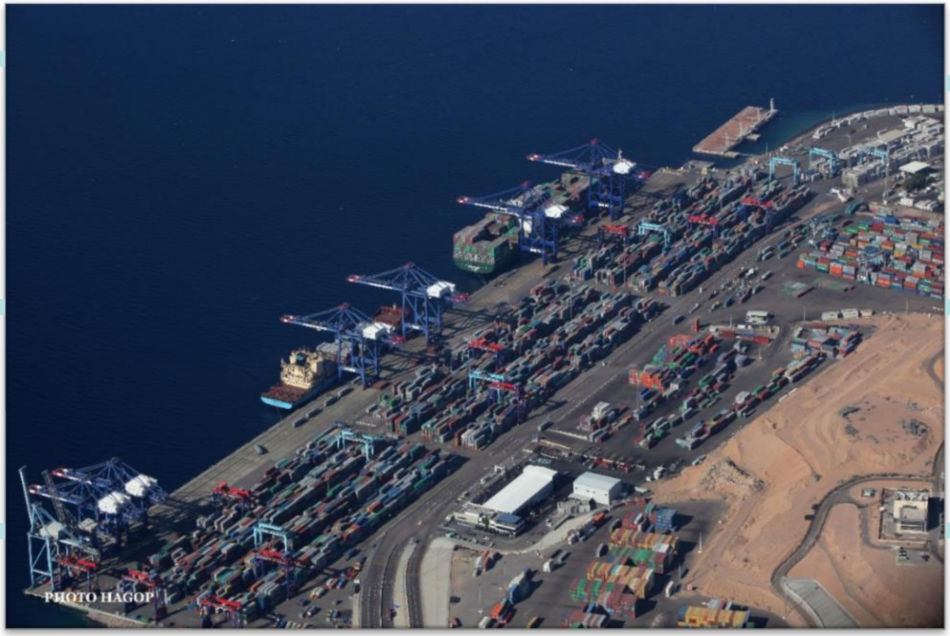
Existing two berths 1 & 2 in the main port will be handed over to Al-Ma'abar to be used for accommodating cruise ships.

AQABA CONTAINER TERMINAL

Contract
BOT – PPP

Capacity
2.4 Million TEUs/ Year

No. of Berths
4



Developer
ADC & ACT

Contractor
BAM & MAG

Investment
220 MJOD

Stage	No. of berths	Current Status	Duration
Stage 1	4 berths for a total length of 1000 m	Completed	2011-2013
Stage 2	1 berth for a total length of 250 m	In study phase	2017-2018

FERRY TERMINAL

Period
2013 – 2015

No. of Berths
2

Capacity
4 Cruise /Day
2000 Pax / Cruise

Developer
ADC

Investment
28 million JD

Financing
By ADC

Project Components:

- Expansion of Terminal Blg.
- Separating Arrivals from Departures
- Establishing Yard for Pilgrims

Current Status:

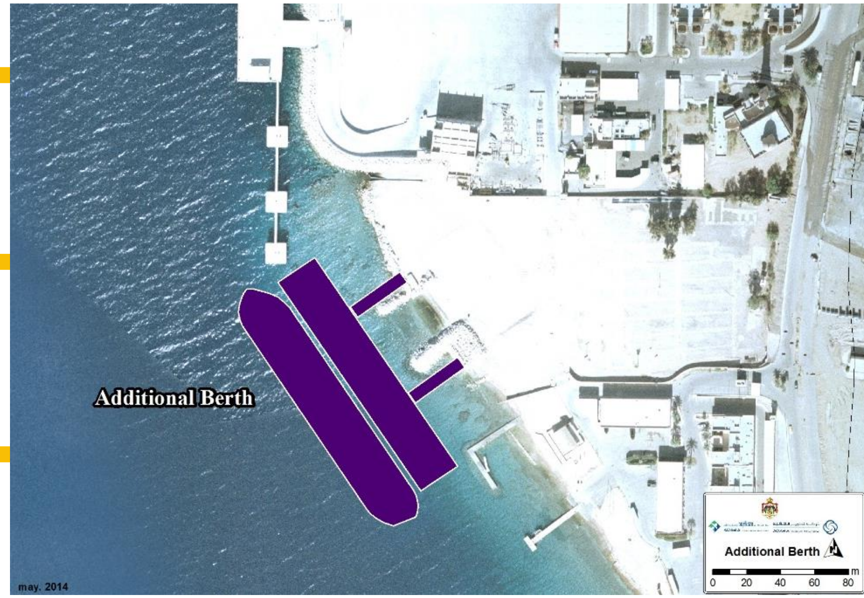
Completed and under operation

ADDITIONAL BERTH

Period
2017 - 2016

No. of Berths
1

Contract
EPC



Developer
ADC

Investment
28 MJOD

Financer
Gulf Grant

Project Components:

1. Constructing one berth for handling general cargo (160m and width 30m).
2. Constructing Naval Boats Harbor.
3. Constructing Road and Gate
4. Constructing Storage Yard
5. Constructing Access Bridge

Current Status:

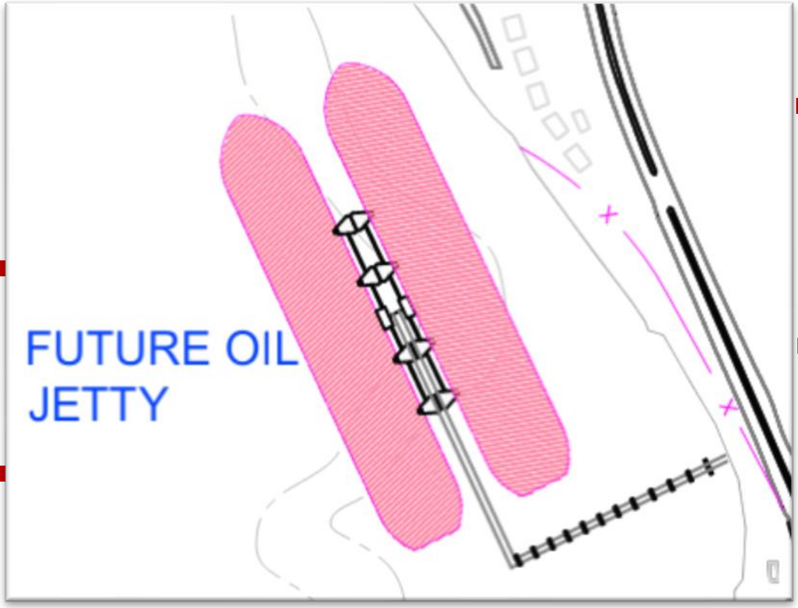
The contract of Concept Design and tender documents preparation has been awarded to Royal Haskoning and ACE JV.

OIL EXPORT TERMINAL

Contract
Under negotiation

No of Berths
2

Capacity
2 Million
Barrels/ Day



Developer
MEMR & ADC

Financing
By MEMR

Project Components:

- Construction of two berths
- Shore installations and facilities
- Metering Station
- Logistic Yards
- Pipeline

Project Status:

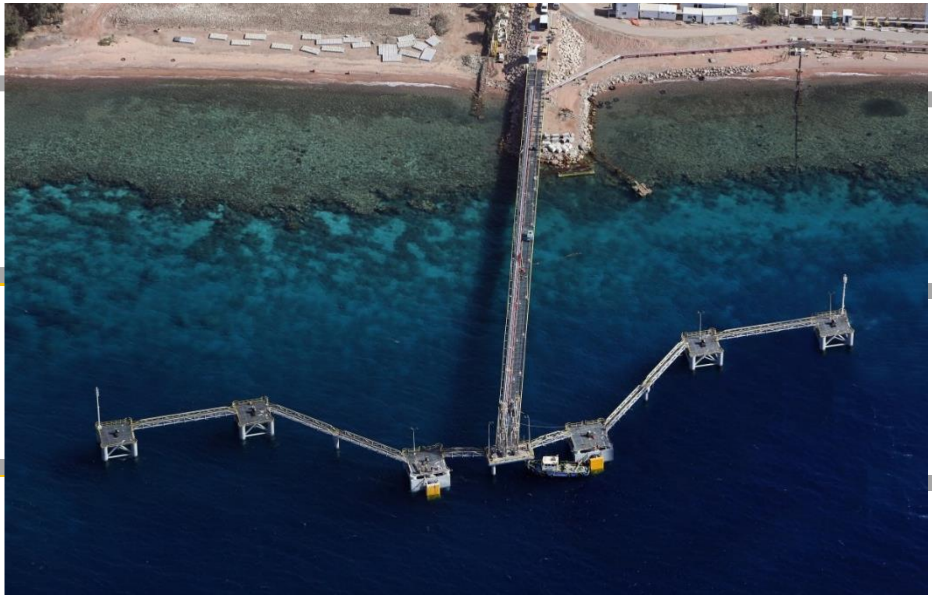
- Ongoing negotiations between the Iraqi government and MEMR
- MOU signed.
- ADC Had prepared a concept layout for the terminal and will conduct all required studies and analysis.

LIQUEFIED PETROLEUM GAS (LPG) TERMINAL

Contract
EPC

No. of Berths
1

Capacity
.. Ton / day



Developer
MEMR & ADC

Investment
17 Million JD

Financing
By MEMR

Project Components:

- Construction of 1 specialized berth
- Constructing Access trestle
- Installation of Loading Arms
- Constructing transport pipeline

Project Status:

Currently the terminal is being operated and the terminal handled its first gas shipment on March 1st 2015.

LIQUEFIED PETROLEUM GAS (LPG) TERMINAL

AL-SABBAH LNG TERMINAL & TUG JETTY

Contract
EPC

No. of Berth
1

Period
2015 - 2014

Developer
MEMR & ADC

Investment
46 Million JD

Financing
By Kuwaiti Fund

Project Components:

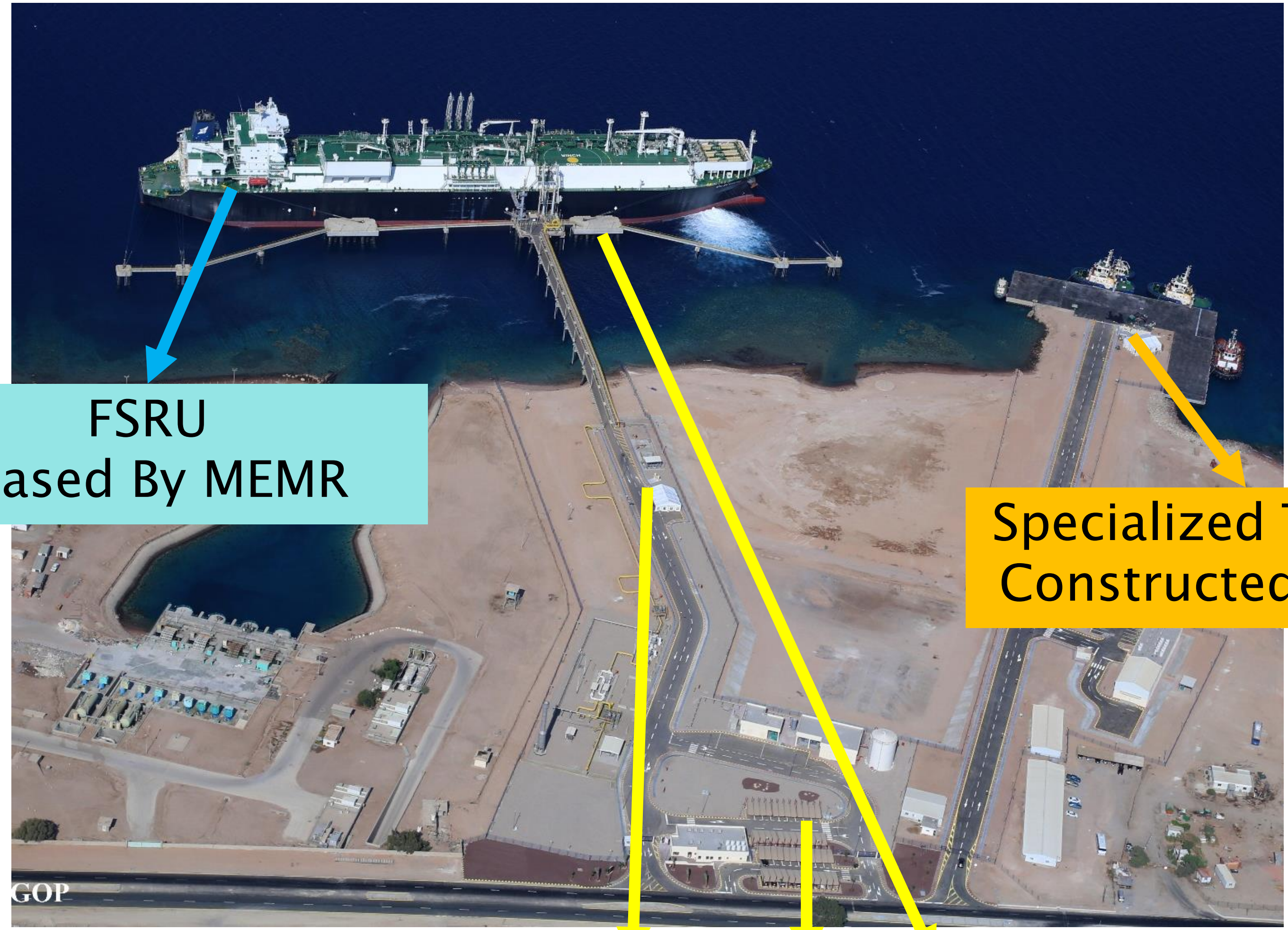
The project consists of two parts:

1. FSRU
2. Specialized Berth, handling facilities, Pipeline, offshore facilities, access trestle and specialized Tug jetty and boats.

Current Status:

- Construction works completed and the terminal is being operated.
- Up to date the terminal has handled 34 shipments.

AL-SABBAH LNG TERMINAL & TUG JETTY



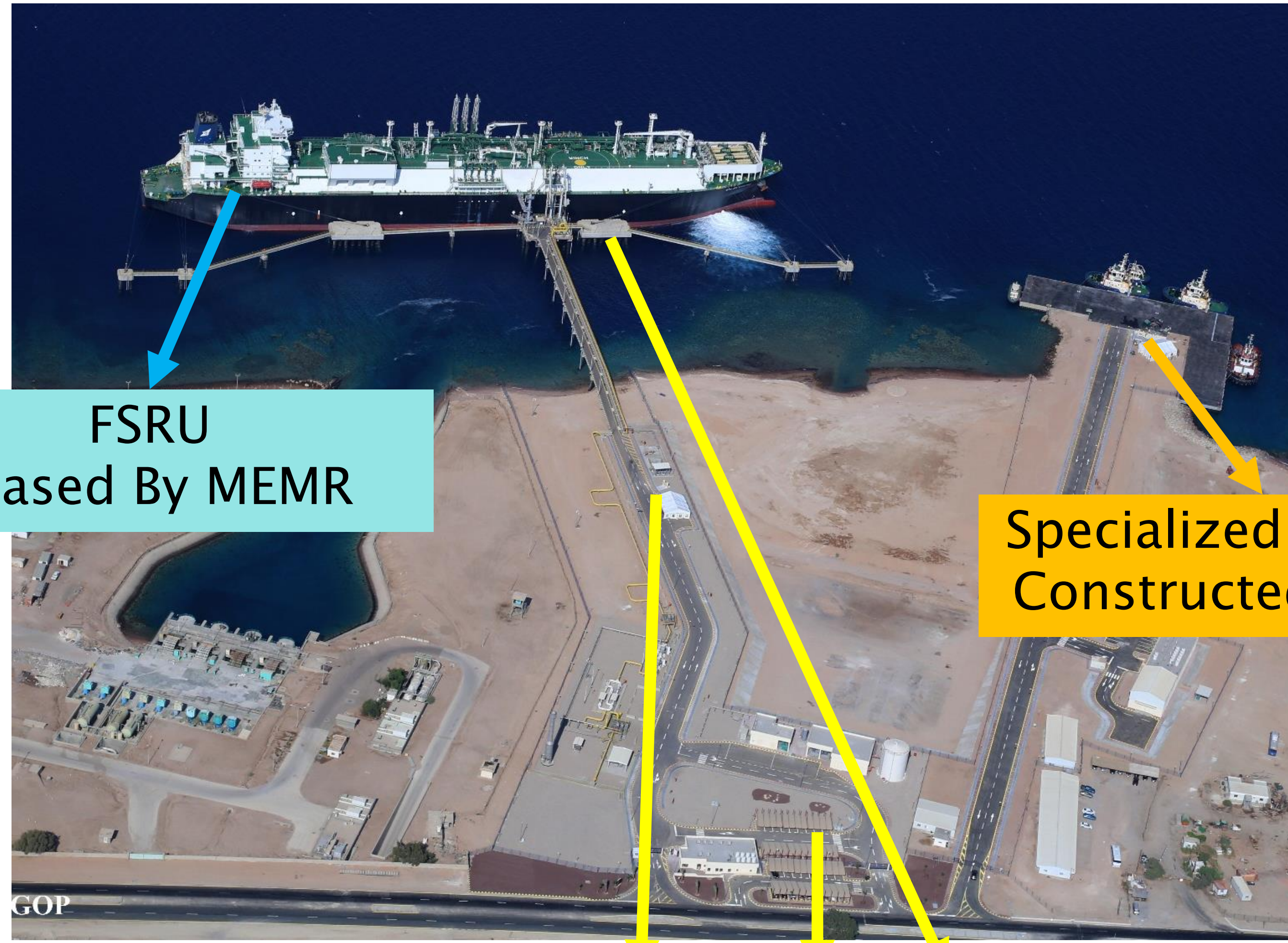
FSRU
Leased By MEMR

Specialized Tug Jetty
Constructed By ADC

Onshore Facilities
Constructed By ADC

AL-SABBAH LNG TERMINAL & TUG JETTY

AL-SABBAH LNG TERMINAL & TUG JETTY



FSRU
Leased By MEMR

Specialized Tug Jetty
Constructed By ADC

Onshore Facilities
Constructed By ADC

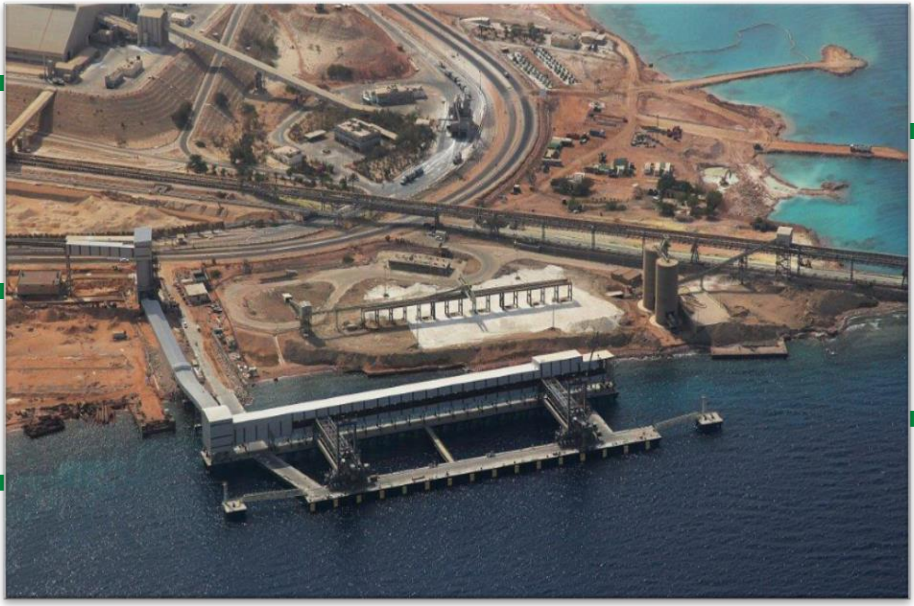
AL-SABBAH LNG TERMINAL & TUG JETTY

PHOSPHATE TERMINAL

Contract
BOT

Period
2011 – 2013

Capacity
6 M Ton/ Year



Developer
Jordan Phosphate Mines Co.

Investment
170 M JD

Project Components:

The project consists of :

1. One Berth
2. Offshore Facilities such as conveying system, storage and truck loading and marshaling system .. etc.

Current Status:

- Construction work is completed and the terminal is being operated.

INDUSTRIAL TERMINAL

Contract
BOT

Period
2015 – 2017

Developer
Jordan Industrial Ports

Investment
120 M JD

Project Components:

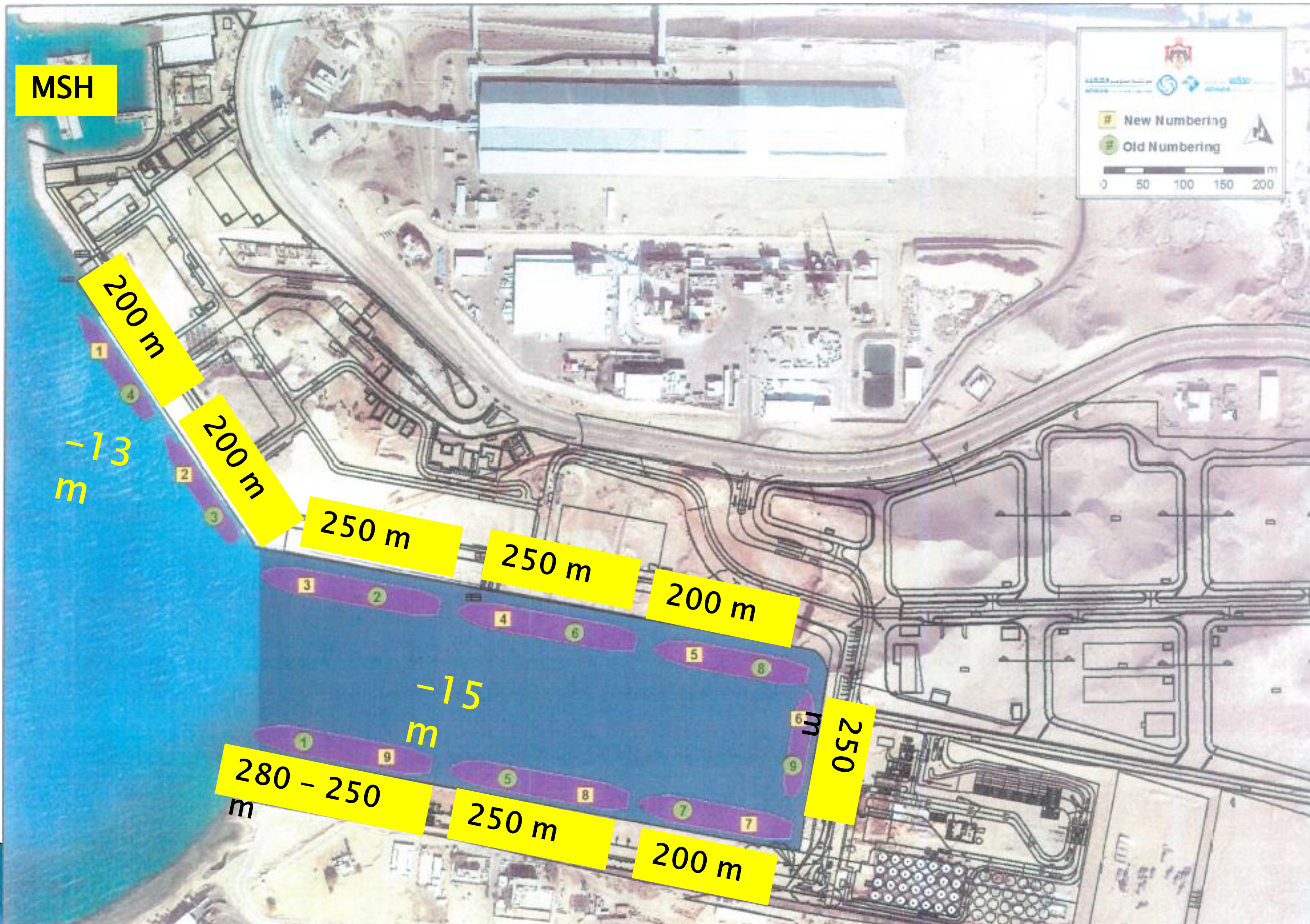
- Rehabilitate the Current 2 Jetties
- Construction of a new Jetty
- Develop the equipment and the Conveyor System

Project Status:

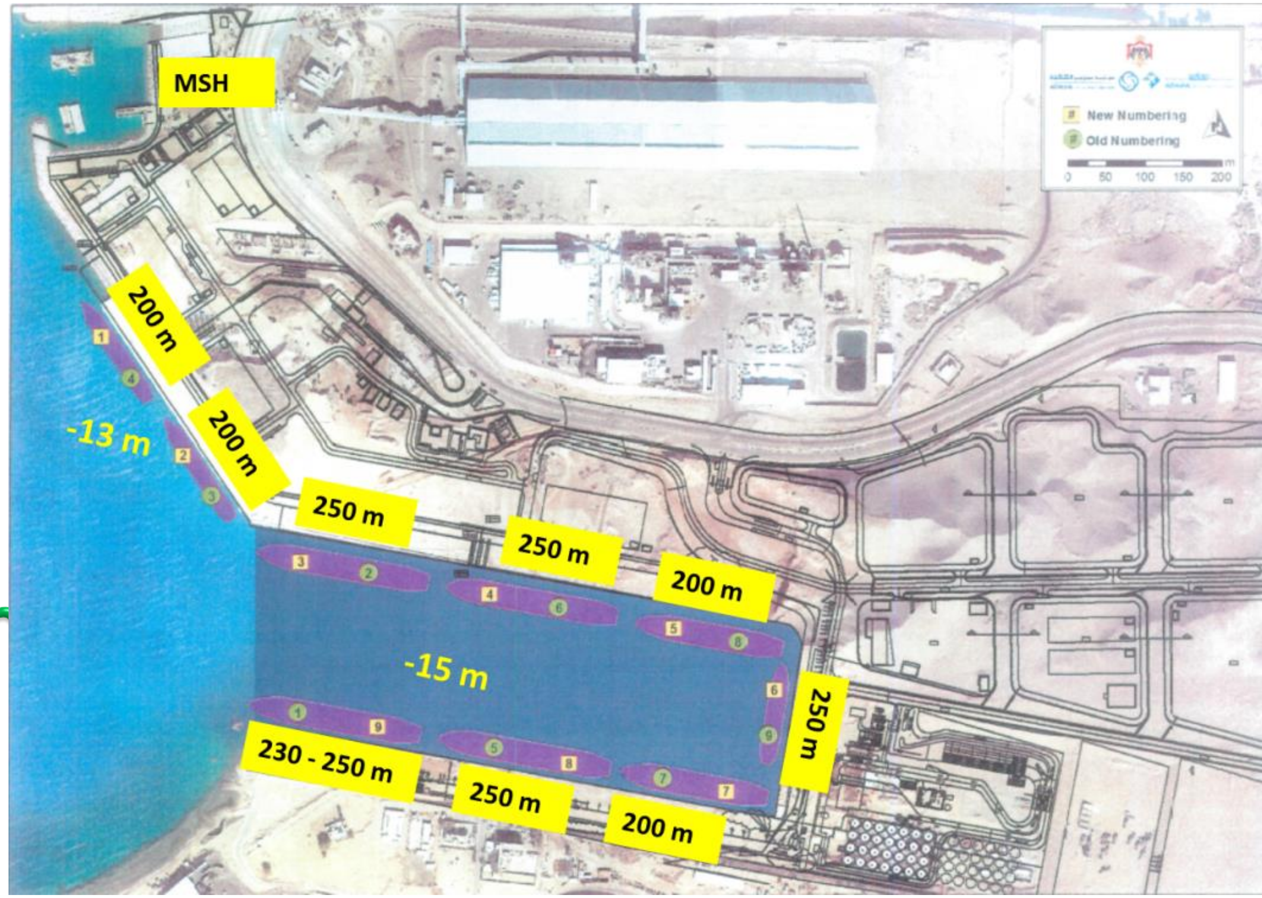
In implementation Phase

South Ports Community

Aqaba New Port Berths



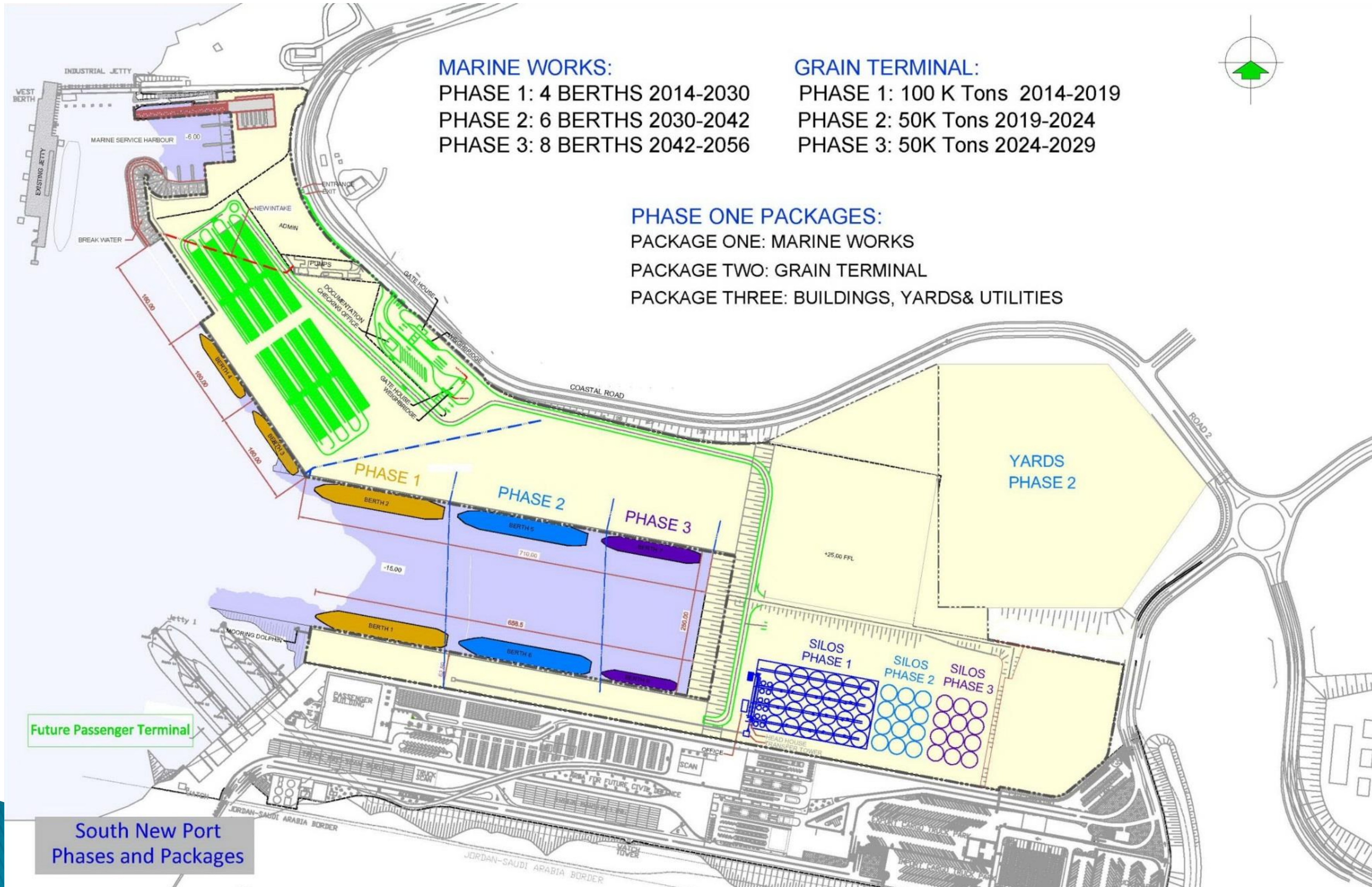
Aqaba New Port Berths Utilizatior



Ro-Ro: Ro-Ro vessels will be handled on berths 7, 8 and 9 as no protection curb to be installed at apron edge allowing for vessels ramp to be placed. Also the curb will be partially omitted from top of berth 6 to provide more

Grain: will be handed on berths 8 and 9 allowing for direct unloading through truck loading station (six stations) that can also be used by private sector.

NEW PORT


MARINE WORKS:
PHASE 1: 4 BERTHS 2014-2030
PHASE 2: 6 BERTHS 2030-2042
PHASE 3: 8 BERTHS 2042-2056
GRAIN TERMINAL:
PHASE 1: 100 K Tons 2014-2019
PHASE 2: 50K Tons 2019-2024
PHASE 3: 50K Tons 2024-2029
PHASE ONE PACKAGES:
PACKAGE ONE: MARINE WORKS
PACKAGE TWO: GRAIN TERMINAL
PACKAGE THREE: BUILDINGS, YARDS& UTILITIES
PHASE 1
PHASE 2
PHASE 3
YARDS
PHASE 2
SILOS
PHASE 1
SILOS
PHASE 2
SILOS
PHASE 3
COASTAL ROAD
Future Passenger Terminal
South New Port
Phases and Packages

Thank you For Listening
Captain: Mohammad Dalabieh'
PSA 90- WMU

Reference:

Study conducted to JSA
Arab federation presentation
ADC presentations