

February 19th, 2017

HAROPA - Ports of Le Havre, Rouen and Paris Your logistics solution to connect India with European markets



HAROPA, A PORT LEADER

HAROPA is a joint venture between the French ports of Le Havre, Rouen and Paris.

The HAROPA alliance was created in 2012 with the purpose of building up a European-sized port system in the field of industry, logistics and tourism dedicated to its customers.

Actually being the largest French port system with **87.1 Mt** of sea traffic and more than **20.2 million tons of river traffic in 2016**, HAROPA ranks 5th on the northern range.

As the first port of call on the North-European range, this port complex enjoys an exceptional geographic location along the northern seaboard of France and irrigates the European market owing to the quality and fluidity of the connection networks.

5th biggest North-European port, HAROPA is positioned as a major maritime hub in Europe, equipped with a **competitive and sustainable logistics system**. As it integrates the logistics chain from one end to the other, with an efficient and environment-friendly service to the hinterland, HAROPA offers **comprehensive and high-performance solutions**.



2016 KEY FACTS AND FIGURES

87, 1 million tons of sea traffic

2, 6 million TEU of container traffic

20, 2 million tons of river traffic in the Paris region

HAROPA: THE LEADING FRENCH PORT AND GATEWAY TO EUROPE

1 Container port for the external trade of France

1 World port for wines and spirits: around 1 billion bottles came in transit via Le Havre in 2016

1 French platform for the import/export of vehicles

1 European port being security ISO 28,000 certified (and 2nd worldwide)

▶ **But also...**

HAROPA located in France, is directly connected to Paris Region representing the **second biggest market in Europe**. HAROPA ports constitute a fluid and rapid access way to the European Greater West, completed by a **multimodal offer linked to the whole world** with:

▶ **A full range of regular maritime containerized services with all continents:** 600 ports of calls, 60 shipping companies, more than 3,700 commercial offers.

▶ **Top-quality services for the biggest vessels in operation in the world:** more than **400** containerships with a capacity of more than **10,000 TEU** accommodated to 2015 in Le Havre

▶ **Around 120 weekly service offers by rail**

▶ **Highly-developed and fluid road infrastructure**

▶ **2 international airports** directly connected

▶ Within a radius of **200 km**, about **15 platforms along the Seine river to serve the Paris region**

▶ **Multimodal platform** investments

▶ **Environment-friendly logistics solutions:** 1 barge convoy equivalent to 4 block trains or 220 trucks

MAJOR ASSETS FOR TRADE

- ▶ **24/7 and 365/365d** Maritime access
- ▶ **1H30** Piloting time from pilot on board to berth

Rail connections



Waterway connections



HAROPA: A MAJOR ECONOMIC PARTNER WITH INDIA

The top commodities of Indian... imports from HAROPA / exports to HAROPA

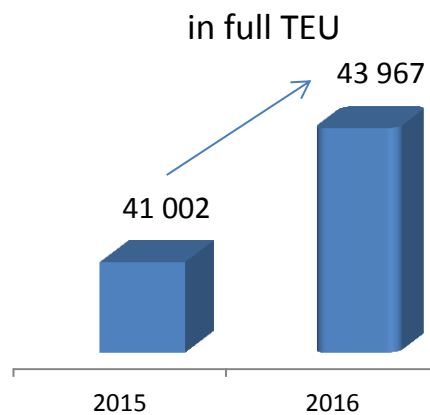
From India	To India
Leather, textile and garments Chemicals / pharmaceuticals Manufactured goods	Paper, carton Rubber Plastic Wooden chips Machinery, motors & parts

*France is ranking among the **3 major foreign investors in India**.

There are more than 1 000 French subsidiaries settled down in India mainly in the metropolis: Delhi, Bombay, Chennai, Bangalore, Hyderabad, Allahabad and Calcutta. Around **38 top French groups listed on CAC 40** are based in India (Sanofi, Arkema, L'Oréal, Dassault, Alstom, Total, etc.).

India-HAROPA-India maritime container trade:

+7% between 2015/2016



*Source: French Embassy in India Economic Services

HAROPA SHIPPING SERVICES: THE IDEAL TOOL FOR TRADE BETWEEN THE INDIAN SUBCONTINENT AND EUROPE

HAROPA, the largest French port for container trade, is the first major port of call for containerships at the entrance to North Europe with 2.6 million TEU (maritime trade). HAROPA brings the Indian Subcontinent closer to Europe:

Indian ports connected with HAROPA



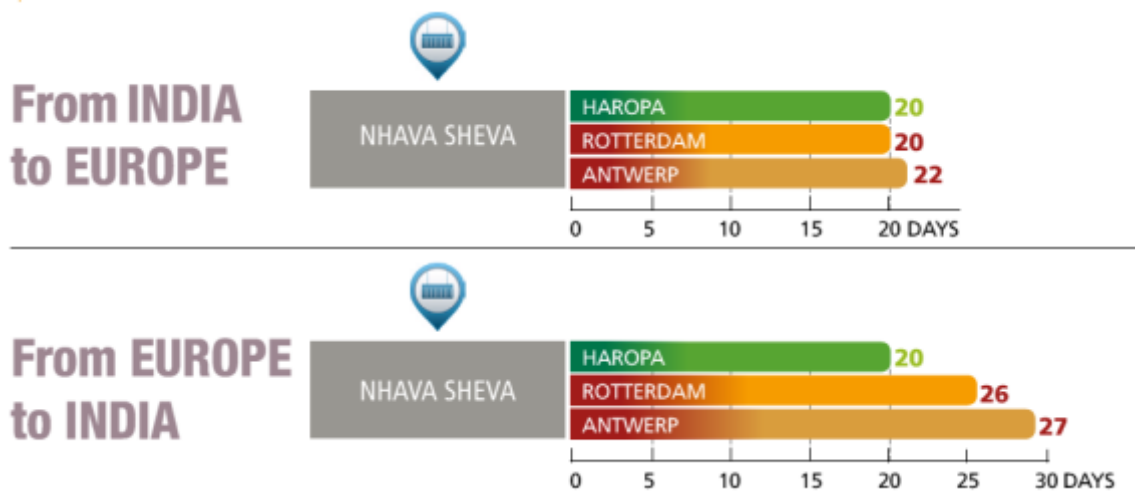
CONTAINER OFFER

► Nearly 16 shipping Companies

- ANL
- APL
- CMA CGM
- COSCO SHIPPING
- EVERGREEN
- HAMBURG SUD
- HAPAG LLOYD
- HYUNDAI M.M
- K'LINE
- MAERSK
- MOL
- MSC
- NYK
- SAFMARINE
- SHIPPING CORPORATION of INDIA
- UASC

- ▶ **1 NVOCC:** ECUWORLDWIDE
- ▶ **The Indian Subcontinent, a first-class partner for HAROPA:**
 - More than **120 liner commercial offers**
 - **16 ports connected** with the Indian Subcontinent

Excellent transit times to connect India with European markets:



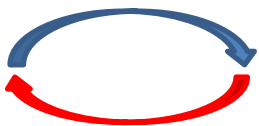
« RORO » OFFER

- ▶ **3 Shipping Companies**
 - HOEGH AUTOLINERS
 - VAN UDEN SHIPPING
 - EUKOR
 - **+ 1** depending on volume: BAHRI

▶ **5 commercial offers**

▶ **2 ports connected**

▶ **Transit times with Le Havre:**



- LE HAVRE to MUMBAI = 29 days
- MUMBAI to LE HAVRE = 40 days
- LE HAVRE to CHENNAI = 25 days
- CHENNAI to LE HAVRE = 45 days

HAROPA: THE LEADING FRENCH PORT AND GATEWAY TO EUROPE

A simple, rapid, secure, easily accessible and low-cost customs clearance

Customs performance

- ▶ 100%: paperless customs clearance rate;
- ▶ 4 min 38: average customs clearance lead-time (2016);
- ▶ DELT@ customs clearance system accessible 24/7;
- ▶ 1st world paperless: classification established by the World Bank Doing Business based on the criterion of the number of documents to be attached to the customs declaration.

Imports

Improved cash flow

- ▶ VAT Reverse Charge Procedure for importers (cash saving and more simple);
 - On simple request to French Customs
 - only the intra-community VAT n° is needed
 - without intrastate Declaration for Trade in goods (DEB in French)
- ▶ Free, systematic postponement of payment of VAT to the 25th of the following month;
- ▶ VAT exemption: A12 import procedure;
- ▶ VAT suspension: procedure 42.



Exports

- ▶ Interconnection of Delta and Gamma teleprocedures: dematerialization of documents and automation of the European Union exit visa;
- ▶ “Aubette” computer system: ensures the traceability and authenticity of exports of wines and spirits;
- ▶ VAT exemption: automatic, instant return of proof-of-export documents.

HAROPA, A DIGITAL PORT

Deployment of S)ONE, the new-generation Port Single Window solution

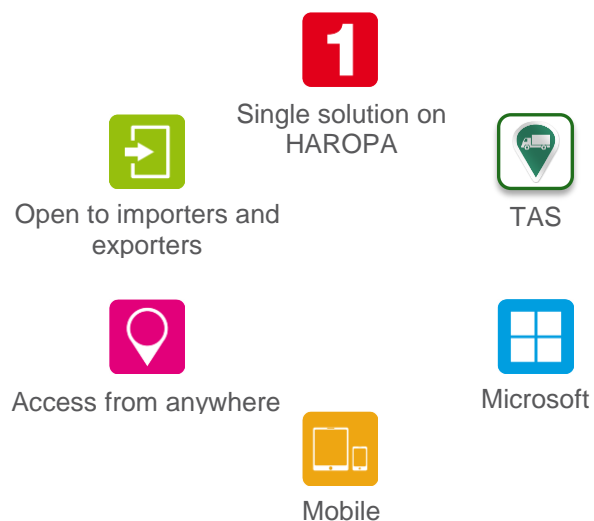
- ▶ Interconnection of the Customs Authorities and port professionals;
- ▶ Ease and traceability of goods movements;
- ▶ Simplification and security of customs declaration operations.



TIMAD – management of hazardous materials

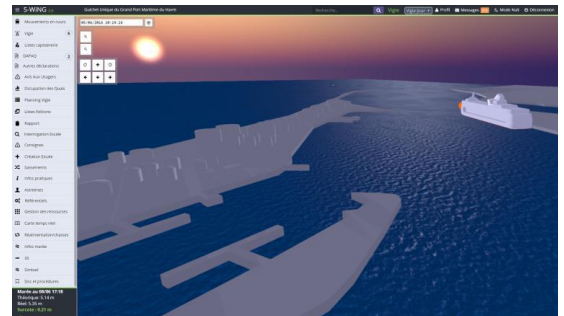
A dedicated computerized tool for Hazardous Materials to reinforce port security

- ▶ Tracking and tracing 24h/24 - 7d/7 of hazardous materials;
- ▶ Strict regulations:
 - SOLAS (Safety Of Life At Sea)
 - MARPOL (MARine POLLution)
 - European conventions (the 2009/16 EC directive)
 - French « RPM » regulations (regulations for the transport and handling of hazardous goods in seaports).



Software package S-WiNG[®]

- ▶ # 1 French port complex, displays itself in three dimensions through the development of its software package S-WiNG[®]
- ▶ A solution to virtually plunge into the environment of the Normandy port, to go into the heart of its daily activities and draw a wealth of information



HAROPA, YOUR LOGISTICS SOLUTION

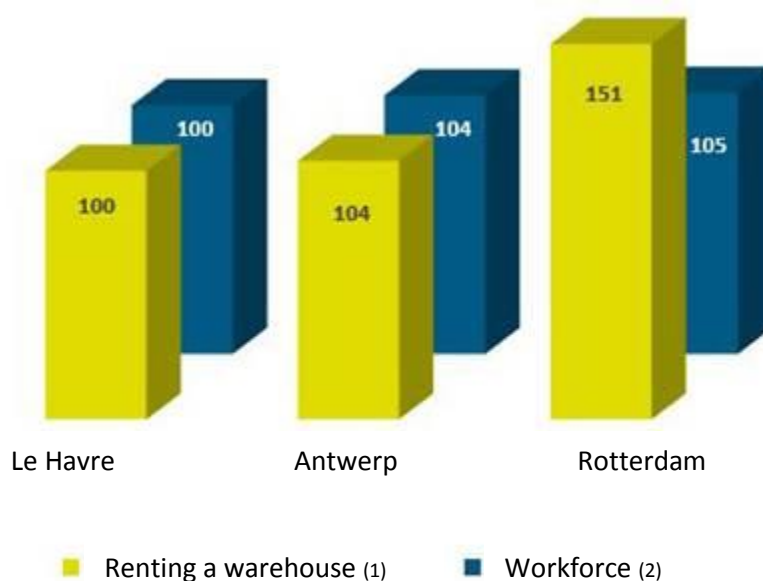
- ▶ **1st logistics hub** in France
- ▶ **2.7 million sqm. of warehouses in operation**, warehousing surface and land reserves available at very competitive rates;
- ▶ **Multimodal** connected logistics warehouses ;
- ▶ **Largest French logistics hub with Roissy;**
- ▶ **Chosen by the world-class logistics/forwarding companies:** Balguerie, Dachser, DSV, Katoen Natie, Fedex, Geodis, Giorgio Gori, JF Hillebrand, Kerry Logistics, Kuehne+Nagel, Rhenus Logistics, Schenker, Bollore Logistics etc.
- ▶ **Skilled, qualified, competitive and dependable manpower:**
 - A full range of specialized international training schemes
 - A low rate of temping employment
 - Competitive logistics labor
- ▶ **Strengthening of HAROPA logistics hubs**
- ▶ **New container logistics settlements in proper name or via logistics developers :**
 - Le Havre: Logistics Park of the Normandy bridge PLPN 2 (Panhard Group and Bollore Logistics); PLPN 1 (AEW); Le Hode Park (Prologis),
 - Rouen: Port-Jérôme 2 (Panhard Group),
 - Paris: Gennevilliers (Segro via its subsidiary Vailog; DSV) and Bonneuil (Franprix).



HAROPA land and estate available as per 30th January 2017

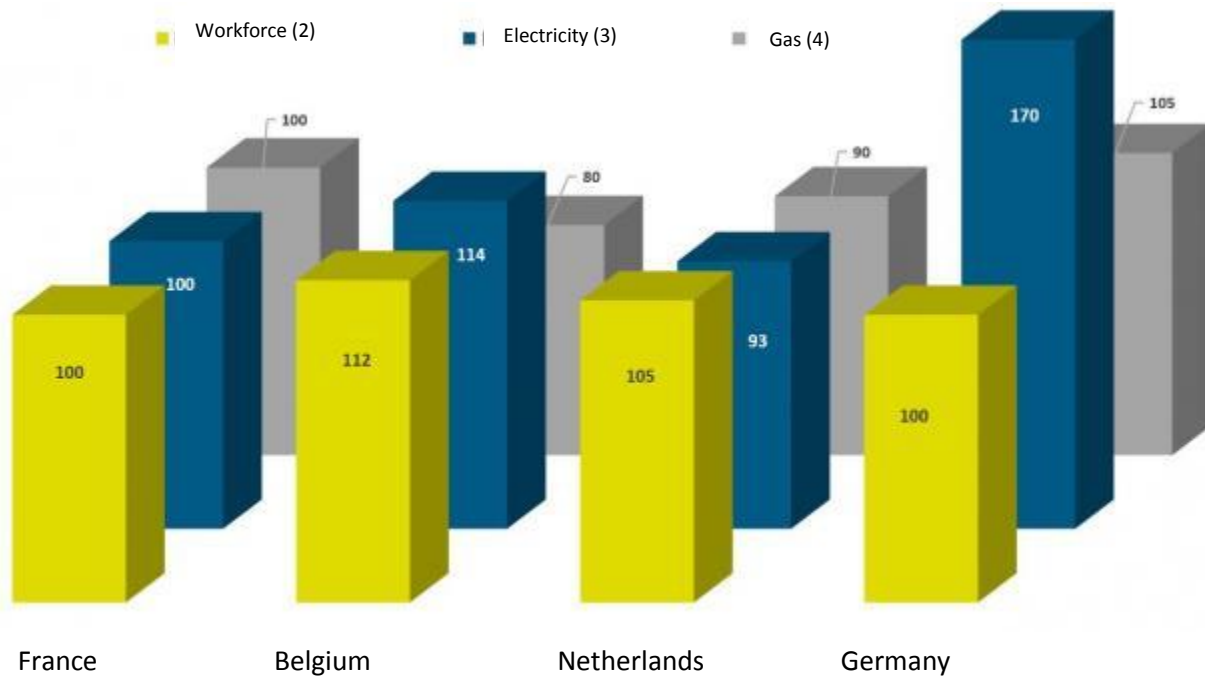
	Warehouse immediately or short term available	Land available on medium or long term forecast
HAROPA – Le Havre	+ 280 000 sqm	+ 100 ha
HAROPA – Rouen	+290 000 sqm	+ 120 ha
HAROPA - Paris	+ 240 000 sqm	+ 70 ha

► Operating costs among the lowest on the North-European range



(1) Rent «Prime» of warehouses of ≥ 5 000 sqm – study of BNP Paribas Real Estate Research « warehouses in Europe – Property report 2015 T2 »

(2) Total cost of workforce (trainees excluded) per employee equivalent to a full time job per year – Eurostat – NACE Rèv 2



(2) Eurostat – workforce cost per year, salary and treatment (including trainees) NACE Rév. 2 – Sector Industry (except construction), companies with 10 employees or more: 56 741 € par employee equivalent to a full time job in France, 63 523 € in Belgium, 59 350 € in the Netherlands, 56 914 € in Germany (2012)

(3) Eurostat – Price of electricity for industrial consumers, taxes + contribution included – Base tranche ID (yearly consumption between 2 000 and 20 000 MWh): 0, 1015 € / kWh in France, 0, 1164 € / kWh in Belgium, 0,0914 € / kWh in the Netherlands, 0,1730 € / kWh in Germany (2nd semester 2015)

(4) Eurostat – Gas prices for industrial consumers in € / kWh, taxes and contributions included - Base tranche I3 (yearly consumption between 10 000 et 100 000 Gigajoules) : 0,0425 € / kWh in France, 0,0343 € / kWh in Belgium, 0,0383 € / kWh in the Netherlands, 0,0449 € / kWh in Germany (2nd semester 2015)

SAFETY & SECURITY ENSURED

HAROPA – Port of Le Havre

- ▶ 1st port in Europe and 2nd port worldwide **to be certified ISO 28000**,
- ▶ **CSI approved**,
- ▶ **AEO** companies in the port community,
- ▶ **A unique security service in France**, with 130 port security officers, accredited and armed,
- ▶ **17 tightened inspection areas**,
- ▶ **Rounds and patrols** within the port area 24/7 by experienced officers (professional experience, high-level qualification and further education,
- ▶ **Additional services**: Remote surveillance, container escorts...,
- ▶ Port facilities in Le Havre and Rouen compliant with **ISPS code**.

OUR ENVIRONMENTAL CERTIFICATION

- ▶ **HAROPA - Ports of Paris (port of Gennevilliers)**
- ▶ **HAROPA - Port of Le Havre: PERS (Port Environmental Review System)**
- ▶ **"Best Green Seaport" Award**

On June 14, during the 2016 edition of the Asian Freight, Logistics and Supply Chain Awards which took place in China, HAROPA received the award for "Best Green Seaport" for the second year running.



HAROPA RO-RO TERMINAL, A EUROPEAN REFERENCE

HAROPA - leading French platform for the automotive industry - has a real expertise among manufacturers, car parts manufacturers and the distribution network for spare parts.

With the RORO MAX procedure, the port of Le Havre and all the terminal stakeholders are committed to make the Ro-Ro terminal in Le Havre a European benchmark.

The terminal covers **100 hectares** with **8 hectares of additional dedicated area in 2016**. HAROPA is the top French platform for the transit of new vehicles. HAROPA keeps developing services and added value in order to attract new customers and offers a full range of solutions: a dedicated terminal, specialized professionals, rapid inland connections to serve a large hinterland, simplified administrative procedures, secure operations...

Creation of a best practice guide for the handling of vehicles within the Port of Le Havre in order to improve the efficiency of operations.

RO-RO

- The biggest French automotive platform: 308 000 vehicles in 2016
- A multimodal terminal: direct access to the 4 modes (rail, sea, road, river)
- A technical center with higher skilled professionals, service provided 24/7

HAROPA, A GREAT OPPORTUNITY FOR CHEMICAL TRADE

- ▶ **A front-ranking hub**
- ▶ **Upper Normandy** is the fourth largest exporter of chemicals and **Paris area** is the biggest one
- ▶ **The main stakeholders of the HAROPA chemicals cluster:** Total, Téréos, Air Liquide, Exxon Mobil Chemicals, Esso Raffinage Solvay, Omnova, Chevron Oronite, etc.
- ▶ **A multimodal offer tailored:** multimodal connections (sea, road, rail, river, pipe)
- ▶ A dedicated Port Control Center service with TIMAD (e-processing of Dangerous Goods):
 - Real-time tracking and tracing tool
 - Simple, rapid and free-of-charge procedures 24/7
 - Interfaced cargo Community System S)One

CHEMICALS INDUSTRY

- **Ranks No. 1** in France in energetic supply
- **23,44** million tons per year of crude oil in 2016
- **3 main sites**



► **Value-added services:**

- Associated services
- Security and safety plans
- Paperless process via S)One

HAROPA, TOP FRENCH PORT FOR “REEFER TRAFFIC”

► **HAROPA is the leading French platform for temperature-controlled goods**

- Presence **of the main world shipping companies specialized** in ‘reefer’ container transport
- BIP (Border Inspection Post) and CEP (Community Entrance Point) in Le Havre: **the biggest inspection center in France.**
- **A one-stop shop** (PIB, CEP and Customs): grouped together on a single site of the veterinary, phytosanitary and customs services offering significant competitive advantages: facilitation of all checking formalities, /time-saved ?for inspecting imports of animal and plant origin, custom facilities (automatic interconnection between DELT@and TRACES)
- **Rungis Market; 1st world fresh food market.**

REEFER

- **3 000** reefer connectors
- **Remote-monitoring 24h/24**
- **15% volume growth***
- Cargo acceptance rate: 99, 3% in 2014.

**between 2014/2015*

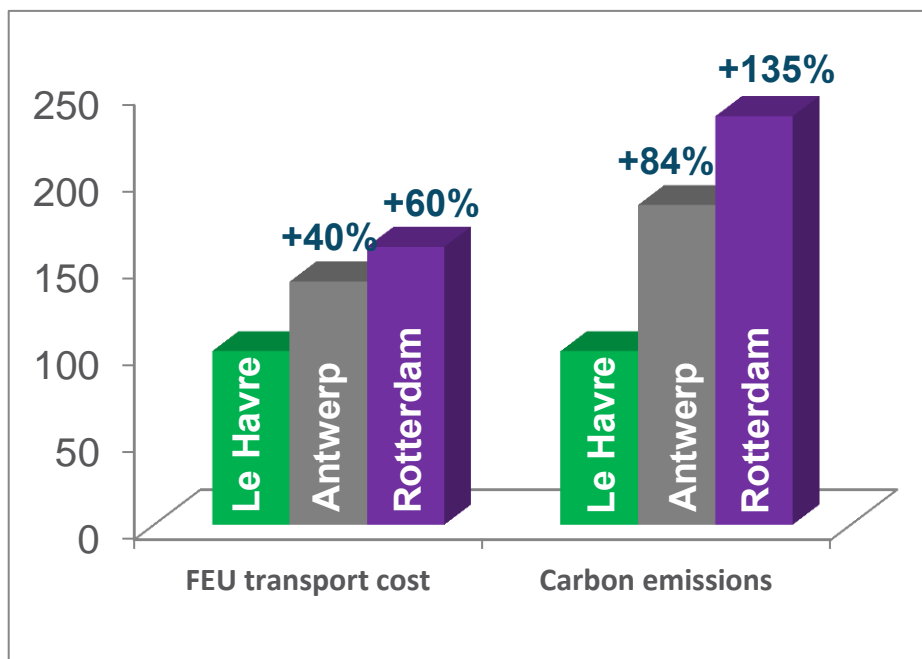
► **Temperature-controlled storage solutions**

- 550,000 m³ of storage capacity under positive temperature (from 0° to 15°) or negative (down to -26°)
- **A logistics zone** dedicated to temperature-controlled storage integrating the BIP/CEP centers and Customs inspections, located near the container terminals and the highways connected to Europe
- **Estate reserves available** in the ‘cold’ park for the construction of additional storage facility

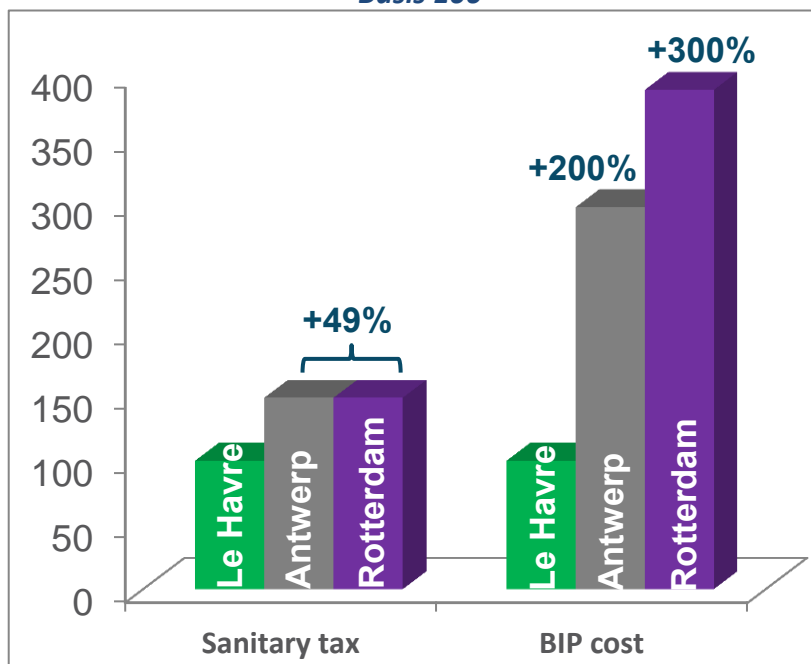
- **An adapted logistics offer:** stock management, order preparation, quality checks, packaging (sorting, weighing, toll cutting, labeling, co-packing...), freezing, deep-freezing, EDI (Electronic Data Interchange), organization of bacteriological and chemical analyses...

COSTS BENCHMARK

Reduced costs of transport
Basis 100



Reduced imports costs towards Rungis
Basis 100



THE 6 GOOD REASONS TO CHOOSE HAROPA

There is always a good reason to choose HAROPA for the dispatch of cargo, the choice of a setting-up or for optimizing one's Supply Chain...

1 AN OUTSTANDING
SHIPPING OFFER

A WIDE RANGE OF REAL
ESTATE AND PROPERTY
OFFERING

2

A LOGISTICS HUB IN THE
HEART OF THE **BIGGEST**
EUROPEAN CONSUMER
MARKET

3

CUSTOMS,
A PARTNER AT OUR SIDE

4

5 DYNAMIC
AND COMMITTED **PORT**
COMMUNITIES

ISO QUALITY, ISO SECURITY
AND ISO ENVIRONMENT
CERTIFICATIONS

6

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About HAROPA

HAROPA, the 5th largest port complex in Northern Europe, is a joint venture between the ports of Le Havre, Rouen and Paris. It is connected to every continent owing to a first-rate international shipping offer (linking 600 ports worldwide). It serves a vast hinterland whose core is in the Seine valley and the Paris region forming the biggest French consumer market area. With around 10 Normandy and Paris area partner ports, the "one-stop" hub now forms in France a global transport and logistics system, capable of providing a comprehensive end-to-end service. HAROPA handles over 120 million tons of cargo by sea and waterway each year. HAROPA business represents 160,000 jobs.

www.haropaports.com