

October 18th, 2017

HAROPA - Ports of Le Havre, Rouen and Paris

Your logistics solution to connect China 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

#1 FRENCH PORT COMPLEX FOR CHINA

► HAROPA, the European port for China

Connected to 700 ports worldwide of which in northern China: 7 ports – 71 commercial offer sales (including 5 for Port of Rouen), in central China: 31 ports – with 137 commercial offers (including 16 for Port of Rouen), in southern China: 41 ports - 221 commercial offers (including 23 for the port of Rouen) via liner shipping services, HAROPA has a large shipping offer on the North-European range. China represents 31% of the total import/export traffic of HAROPA.

► A port which is “speeding up goods transit”

A strategic position: 1st North-European port of call for import, last port of call for export, HAROPA has high-performance transit-times especially from China.

A “new-generation” port single window: S)One, it is the best of Microsoft technology at the service of shipping stakeholders for simplified, reliable and fast regulatory procedures.

Rapid customs clearance: 100% electronic declaration, completed **in less than 5 minutes**, secure and with 24/7 access.

A free-flow port: no congestion neither of the road and motorway network nor the maritime, river and rail traffic.

► A deep-sea port open to sea megaships on the Asian trade

HAROPA - Port of Le Havre offers notable nautical conditions: **accessible 24/7 without tidal constraint**, able to accommodate the largest fully laden vessels. In 2016, the port operated sea giant vessels (+ 10,000 TEU) on a daily basis.

► HAROPA, a logistics hub in France at the service of Asian customers

HAROPA has more than one million sq. m. of warehouses: the real estate offer of the three ports along the Seine corridor is rapidly available for the large logistics sites at attractive costs and with an optimized freight management. Great names of global logistics – Bolloré Logistics, Panhard and Prologis – have chosen Le Havre to continue their setting-up.

The density and frequency of the sea, rail, river and road connections to Great Britain, Europe, but also West Africa make the ports of HAROPA an international logistics hub.

► HAROPA elected “Best Green Port” and “Best seaport in Europe” by 18,000 Asian professionals

On June 29th, 2017, the stakeholders of the supply chain in the Asia-Pacific zone awarded HAROPA “Best Green Port” and “Best Seaport in Europe”. 18,000 Asian shipping and logistics professionals have thus recognized the environmental commitment of the ports of the river Seine corridor.

**All mega shipping alliances include HAROPA in their logistics system
and in their round voyages on the North-European range with transit times
among the most efficient for import as for export.**

1 Container port for the external trade of France

1 World port for wines and spirits: around 1 billion bottles were handled 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...**

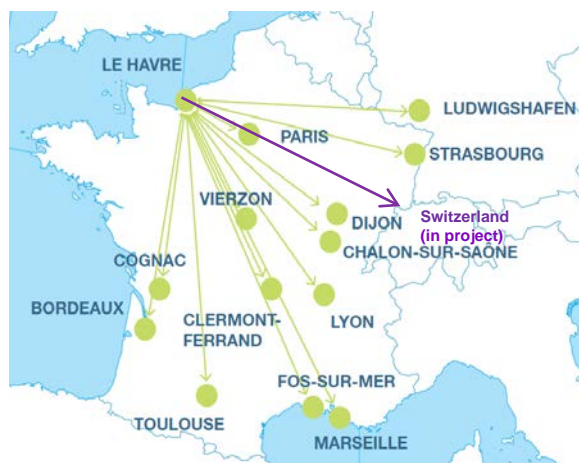
HAROPA located in France, is directly connected to Paris Region representing the **second biggest consumer market in Europe**. HAROPA ports constitute a fluid and rapid access way to the European Greater West, completed by a **multimodal offer** linked to the whole world with:

- **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 in 2016 in Le Havre
- **Around 60 weekly connections 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

Waterway services



Railway services



- HAROPA, the gateway to Europe and priority hub to the Paris region which forms the **#1 largest French consumer market area**.
- A modern and fluid network of river, rail and road connecting urban and industrial European centers (around 100 rail and river connections per week).
- 13 river terminals on the Seine corridor to serve the Paris area.

- ▶ Customs and tax facilities available with river and rail transport.
- ▶ **A full range of regular maritime containerized services with all continents:** 700 ports of calls, 80 shipping companies, more than 4,900 commercial offers:

Shipping container services

Weekly shipping connections with the whole market place

+685 ports called at / **+70** shipping companies / **+3 900** commercial offers



The performance indicators of HAROPA - Port of Le Havre

Since 2015, the stakeholders of Le Havre port community have published their results in complete transparency, answering the real needs of the international exporters and importers.

See more at: <http://fr.calameo.com/read/0013441653306053e339e>



CHINA: A DRIVING FORCE FOR THE GLOBAL ECONOMY

▶ CHINA, the most dynamic economy in the world

Strong increase of GDP in Far East (+7.45%:

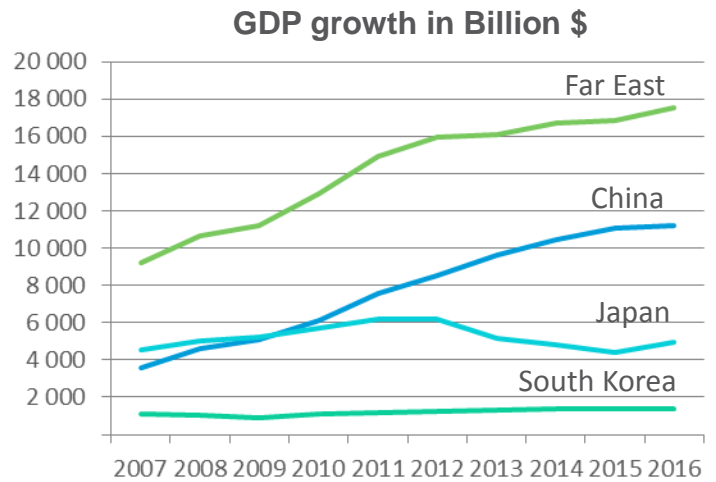
average 2007/2016 GDP growth)

China is the driving force for this increase

(+13.61%: China 2007/2016 average GDP growth / +6.65%: China 2007/2016 average volume of trade)

Chinese domestic consumption becomes more and more important

China has absorbed the most part of the foreign investments (IDE) since 2007



Source: World Bank

▶ CHINA, a major actor in global trade

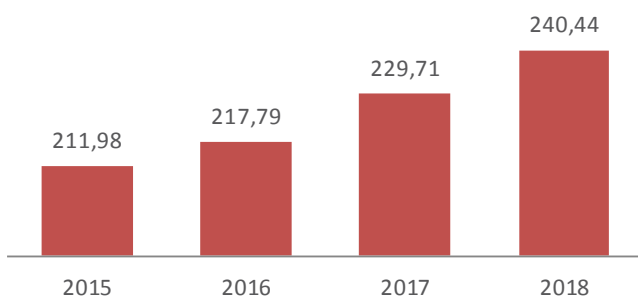
Number of TEUs through China is still increasing

31.9%: China's part in the world number of TEUs forecast in 2018,

+3.8% TEU: from Asia to North-Europe forecast for 2018,

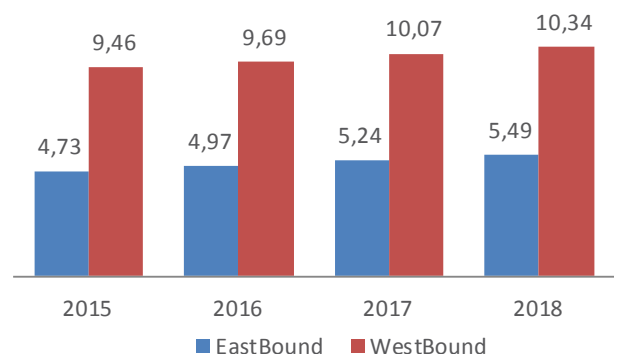
+4.7% TEU: from North-Europe to Asia forecast for 2018.

Number of MTEU in China



Source: Drewry, 2017 June

Estimated evolution of the Asia/Europe trade (in MTEU)



HAROPA: A MAJOR ECONOMIC PARTNER WITH CHINA

► HAROPA, the port for China: some figures

HAROPA connected to 79 Chinese ports,

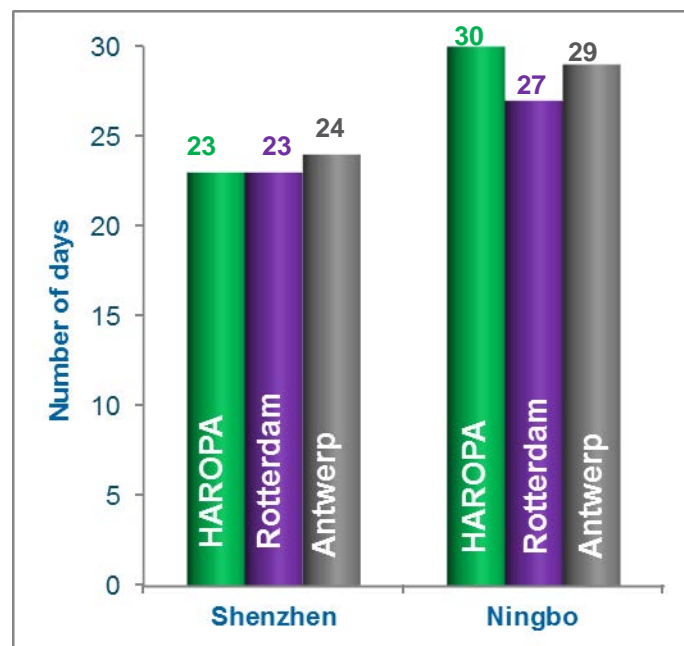
429 commercial offers,

13 (+1 HMM only on westbound) shipping companies serving China directly.

► HAROPA, # 1 for transit-times with China (in number of days)

Competitive transit times CHINA ► HAROPA

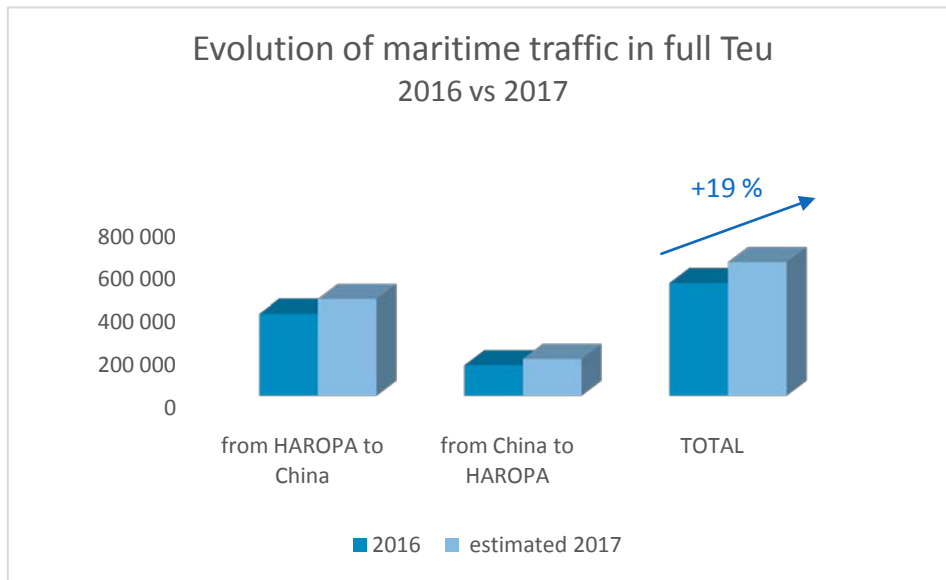
(April 2017)



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

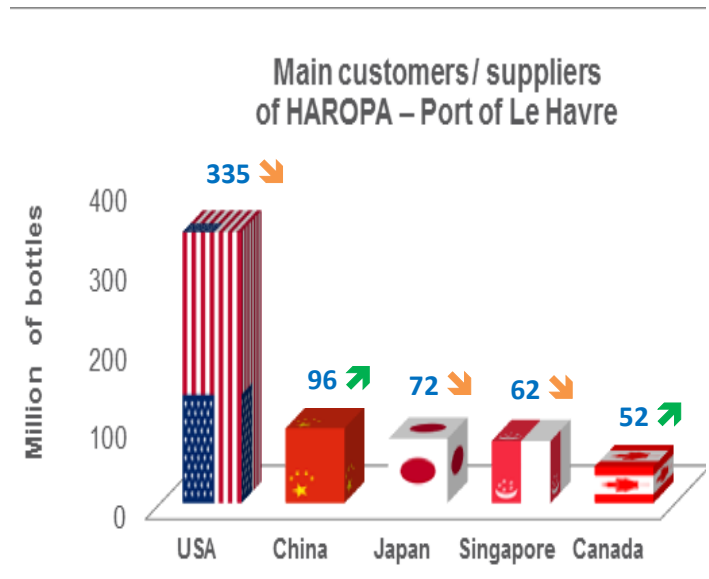
► **China: the largest market for HAROPA**

The top commodities of China... imports from HAROPA / exports to HAROPA	
From China	To China
Manufactured goods (new furniture, toys, etc.), electrical and household equipment, white goods, and parts clothes, luggage items, textiles.	Milk, Meat, Offal, raw plastic material, rubber, chemicals, wood and cork.



► **HAROPA, # 1 port worldwide for wine and spirits exports and leader for the exportation of luxury goods**

- # China is the 2nd most important market area for France regarding wines and spirits
- # More than **1 billion bottles** transited by HAROPA in 2016
- # (35% wines, 31% alcoholic beverages >40°, 11% champagne)
- # **A business growing** by more than 30% since 2010
- # **52 warehouses** dedicated to wines & spirits on HAROPA



► **The RO-RO terminal in Le Havre, a reference in Europe**

Le Havre, # 1 French port for the import and export of new vehicles

A dedicated terminal offering more than 100 hectares of available area, with 8 hectares of additional dedicated area in 2016, fenced and under surveillance

130 port security officers, accredited and armed

10 berths dedicated to accommodate RO-RO vessels

High-speed inland connections to serve a vast hinterland

Quick and easy administrative procedures

3 car preparation workshops of over 4,500 m²

Creation of a guide for good practices on the RO-RO terminal in collaboration with all the stakeholders and with the support of the ECG.

313,000 vehicles handled in the port of Le Havre in 2016 (more than 400,000 vehicles expected in 2017): business in the Ro-Ro terminals of the Seine Corridor increased by 5% against 2015, thus expressing the good positioning of HAROPA in the marketplace, which makes it possible to take the opportunity of the recovery of the automotive sector.

Ro-Ro terminal in Le Havre



a Ro-Ro vessel



RO-RO

- The biggest French automotive platform: **313,000 vehicles in 2016 (more than 400,000 vehicles projected for 2017)**
- A multimodal terminal: direct access to the 4 modes (rail, sea, road, river)
- A technical center with highly-skilled professionals, service provided 24/7

► 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, customs facilities (automatic interconnection between DELT@and TRACES)
- **Rungis Market; #1 world fresh food market.**

REEFER

- **3 000** reefer connectors
- **Remote-monitoring 24h/24**
- **More than 200,000 reefer TEU in 2016 (+26% of seaborne traffic since 2013)**
- Cargo acceptance rate: 99.4% in 2016.

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...

► **Logistics: why investing within the port zones of HAROPA could be a great opportunity?**

HAROPA has a competitive warehouses rental offer at European level. The port of Le Havre represents a land of welcome for Chinese companies, with more than 300,000 sq. m. now in construction.

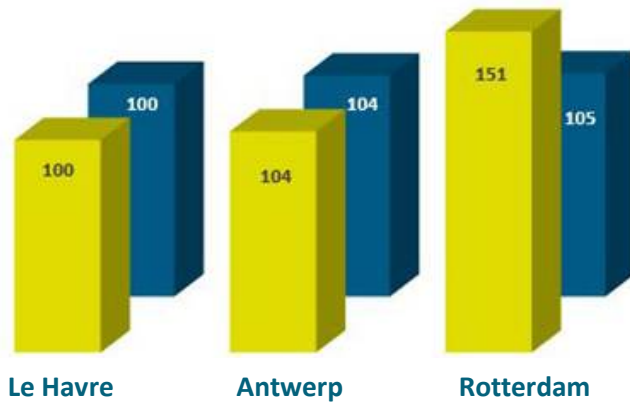
- **Largest logistics hub** in France
- **2.7 million sq. m. of warehouses in operation**, warehousing surface and land reserves available at very competitive rates;
- **Multimodal** connected logistics warehouses ;
- **Largest French logistics hub with Roissy;**
- **Chosen by the world-class logistics/forwarding companies:** Balguerie, Dachser, DSV, Katoen Natie, Fedex, Geodis, Giorgio Gori, JF Hillebrand, Kerry Logistics, Kuehne+Nagel, Rhenus Logistics, Schenker, Bollere 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 Bollere 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 available immediately or in the short term	Land available on medium or long-term forecast
HAROPA - Le Havre	+ 280 000 sq. m.	+ 100 ha
HAROPA - Rouen	+290 000 sq. m.	+ 120 ha
HAROPA - Paris	+ 240 000 sq. m.	+ 70 ha

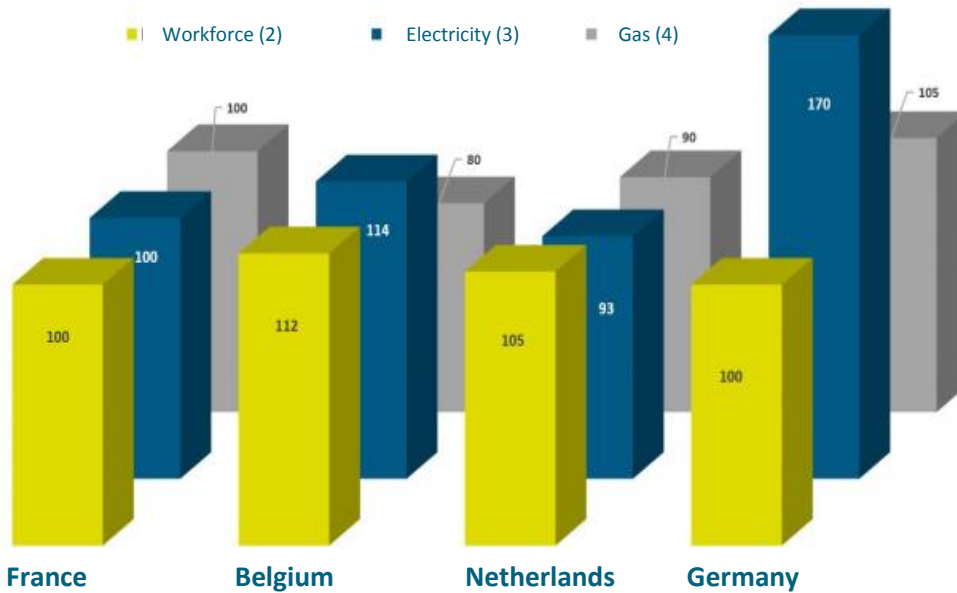
► Operating costs among the lowest on the North-European range



(1) Rent «Prime» of warehouses of $\geq 5\,000$ sq. m – 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 – NACE2

■ Renting a warehouse (1) ■ Workforce (2)



(2) Eurostat – workforce cost per year, salary and wages (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 bracket 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)

HAROPA: THE LEADING FRENCH PORT, THE 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: AI2 import procedure;
- VAT suspension: procedure 42.

Exports

- Interconnection of Delta and Gamma teleprocedures: dematerialization of documents and automation of the European Union exit visa;
- "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

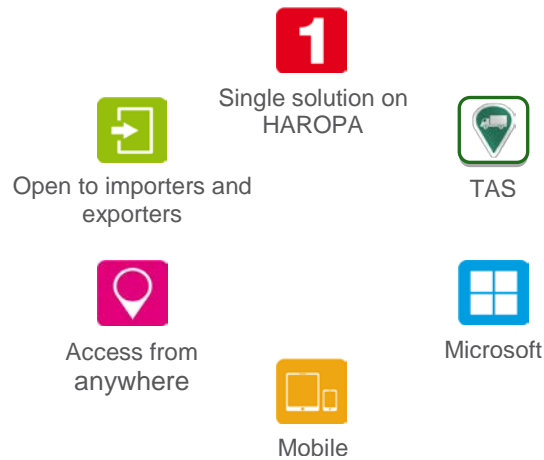
- Interconnection of the Customs Authorities and port professionals;
- Easy traceability of goods movements;
- Simple and secured customs declaration operations.



► TIMAD – management of hazardous materials

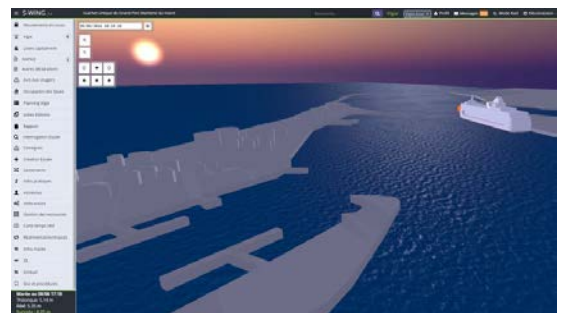
A dedicated computerized tool for Hazardous Materials to reinforce port security

- Tracking and tracing 24/7 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



SAFETY AND 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**.

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 29, during the 2017 edition of the Asian Freight, Logistics and Supply Chain Awards which took place in Singapore, HAROPA received the award for "Best Green Seaport" for the third year running.



THE 6 GOODS 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 TO THE
HEART OF THE **BIGGEST**
EUROPEAN CONSUMER
MARKETS

3

CUSTOMS,
A PARTNER AT OUR SIDE

4

5 DYNAMIC
AND COMMITTED **PORT**
COMMUNITIES

ISO QUALITY, ISO SECURITY
AND ISO ENVIRONMENT
CERTIFICATIONS

6

THEY HAVE ALREADY CHOSEN HAROPA PORTS



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 around 700 ports worldwide). It serves a vast hinterland the centre of which 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.

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