



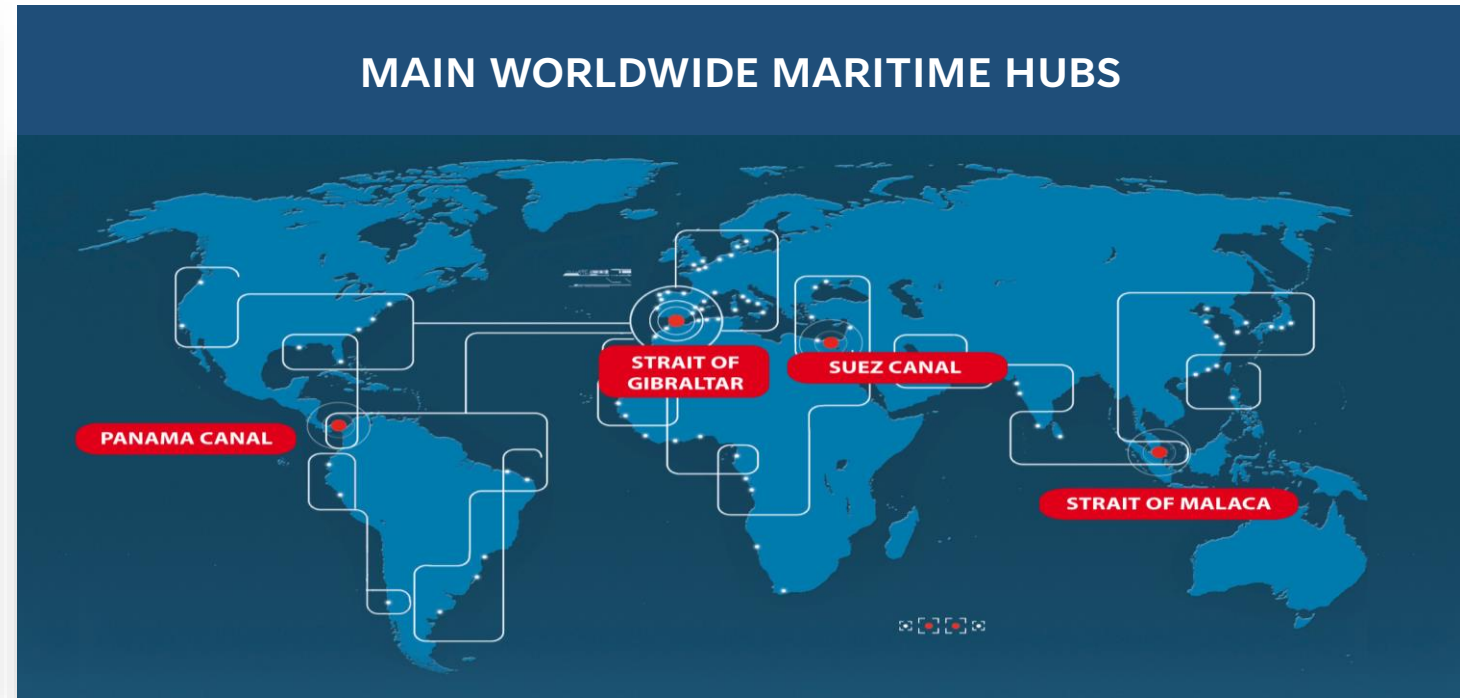
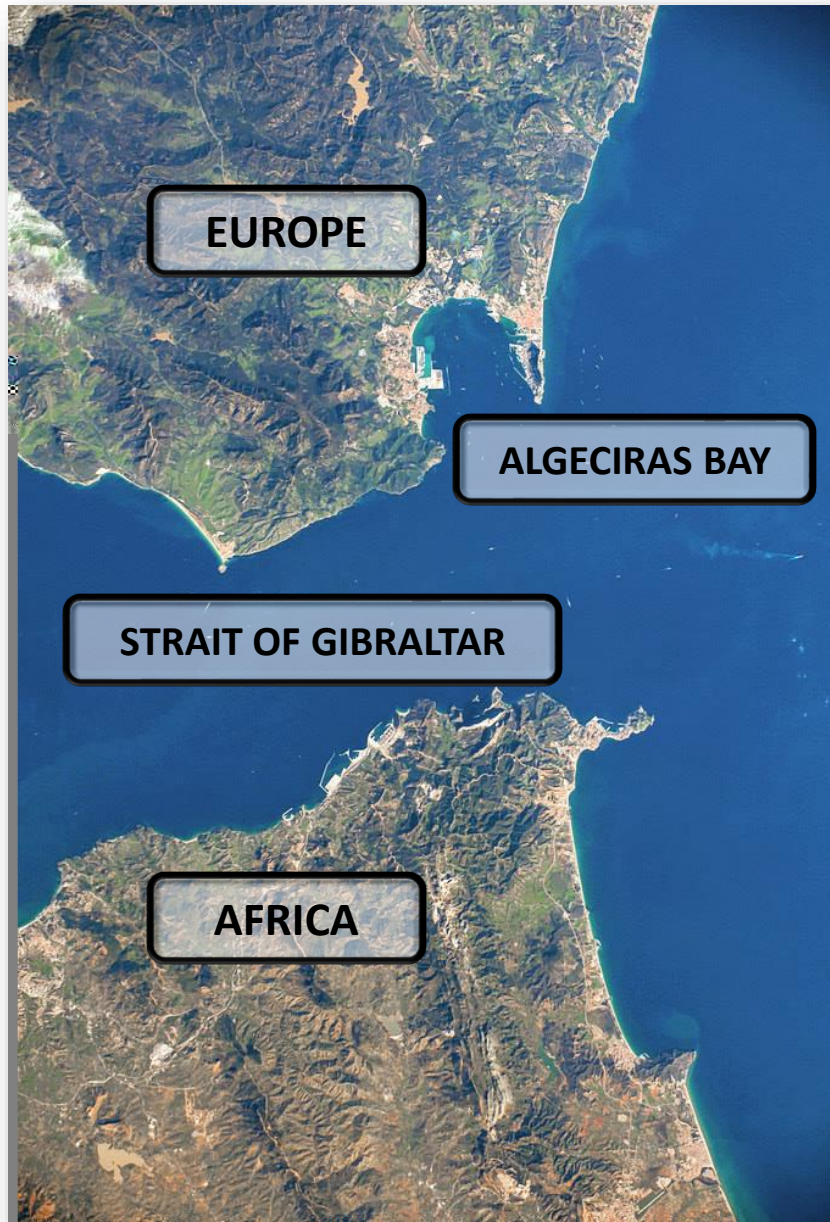
**CARGO SERVICES**

**SEPTEMBER 26<sup>TH</sup>, 2023**





# STRAIT OF GIBRALTAR – STRATEGIC LOCATION



STRATEGIC PATHWAY LOCATED IN  
THE MAIN MARITIME ROUTES  
NORTH – SOUTH – EAST - WEST

BAY NATURALLY PROTECTED LOCATED  
BETWEEN EUROPE AND AFRICA  
ONLY 14 km OFF THE AFRICAN COAST

**STRAIT OF  
GIBRALTAR**

DISTRIBUTION PLATFORM FOR SOUTH  
EUROPE, AFRICA AND THE  
MEDITERRANEAN SEA

ZERO DEVIATION FROM THE MAIN  
MARITIME ROUTES



# STRAIT OF GIBRALTAR – MARITIME BRIDGE BETWEEN 2 CONTINENTS



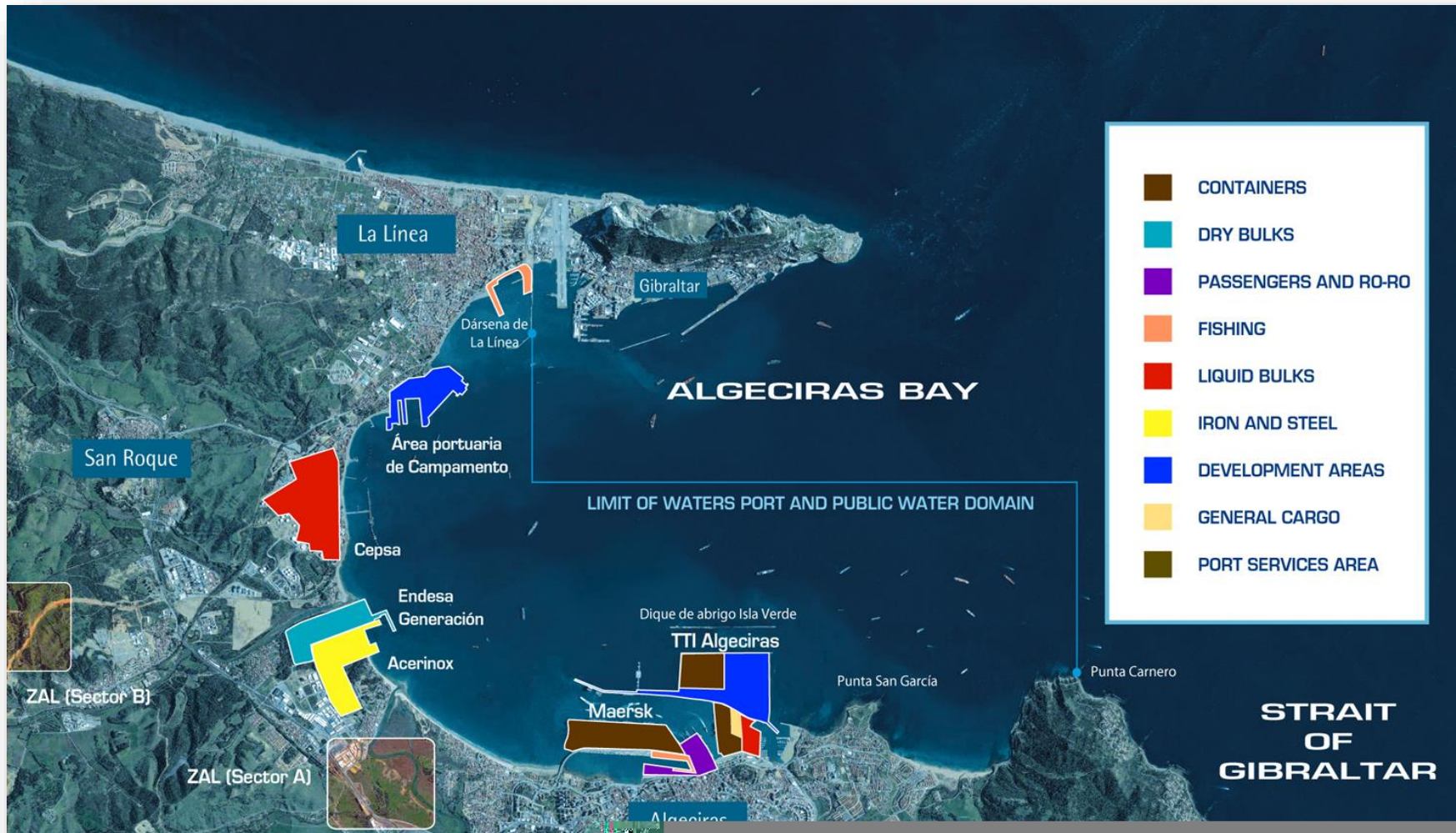
▶ STRATEGIC SHIPPING AREA – 9/20 MAIN MARITIME ROUTES WORLDWIDE

▶ 2<sup>nd</sup> WORLD MARITIME ROUTE – MORE THAN 115,000 VESSELS ANNUALLY

▶ STRAIT OF GIBRALTAR – ZERO DEVIATION AND GLOBAL INTERMODAL NODE



# THE PORT OF ALGECIRAS AS BUSINESS FACILITATOR



**DIVERSIFICATION  
PER SECTORS**

**DEVELOPMENT OF  
INFRASTRUCTURES  
FOR CARGO AND  
SHIPS**

**HIGHLY  
SPECIALIZED PORT  
COMMUNITY**



# ALGECIRAS PORT: 4<sup>th</sup> EUROPEAN PORT

## > FIGURES

**107,2 (million tons) TOTAL TRAFFIC**

**4,7 (million teus)**

**27 (million tons) LIQUID BULK (OIL)**

**3,8 (million tons) BUNKER SUPPLY**

*LEADING THE MEDITERRANEAN MARKET 2022*

**5,5 (passengers) RO/PAX TRAFFIC**

**463.434 (Industrial Trucks) RO/RO TRAFFIC**

## > FACTS

**FIRST INDUSTRIAL CLUSTER IN SPAIN**

**7% ANDALUCIA REGION GDP**

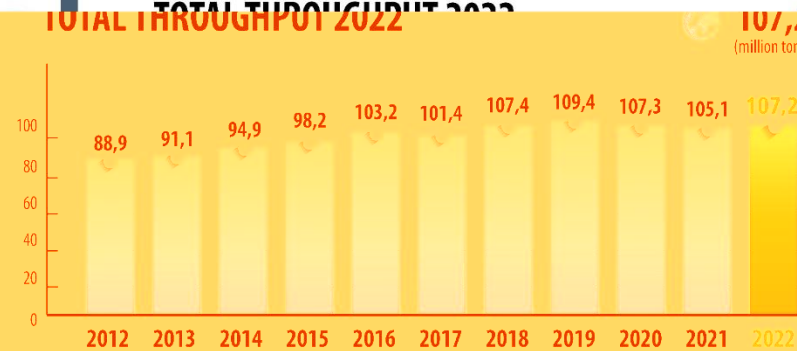
**28.170**

**28.170 EMPLOYMENT IMPACT**

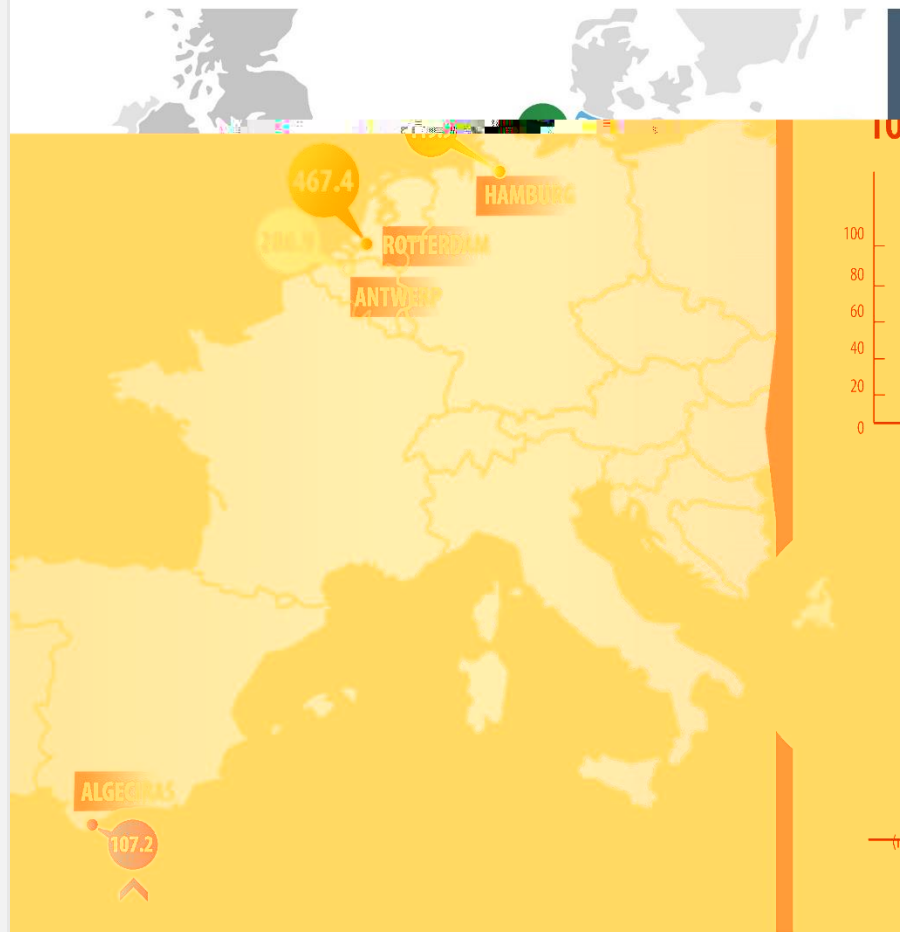
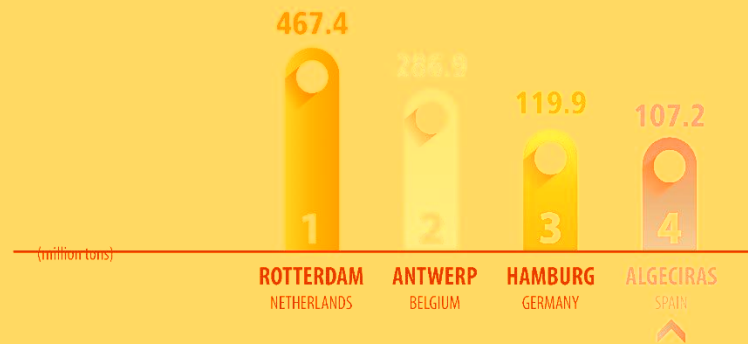
**393**

**393 WORKERS (PORT AUTHORITY)**

## TOTAL THROUGHPUT 2022



## EU TOP FOUR TOTAL CARGO 2022





# PORT OF ALGECIRAS: CONTAINER ACTIVITY – 2 TERMINALS

AFRICA

EUROPE

CURRENT CAPACITY 5.5 M TEUs  
FUTURE CAPACITY: 7.5 M TEUs

APM TERMINALS ALGECIRAS:  
3,864 Reefer Plugs

TTI ALGECIRAS:  
1,296 Reefer Plugs





## PORT OF ALGECIRAS BAY OPERATIONS CENTRE FOR MEGASHIPS IN THE MED



24,346 TEUs

ALGECIRAS  
CALL PORT FOR  
MEGASHIPS



24,136 TEUs



24,000 TEUs

The Port of Algeciras  
continues to invest in  
port infrastructure to  
render service to the  
Future generation of  
**+24.000 TEU**  
Megaships



23,000 TEUs



# World Bank Port Performance Index – Algeciras 1st in Europe and 13th in the world



**Table A.3.** • The CPPI 2022 (the Statistical Approach)

| Port Name            | 2022 Rank | Index Points     |
|----------------------|-----------|------------------|
| Yangshan             | 1         | 93.891159        |
| Salalah              | 2         | 91.866199        |
| Khalifa Port         | 3         | 88.783069        |
| Tanger-Mediterranean | 4         | 84.345303        |
| Tanjung Pelepas      | 5         | 81.404458        |
| Cartagena (Colombia) | 6         | 80.7642          |
| Hamad Port           | 7         | 80.579775        |
| Ningbo               | 8         | 80.349495        |
| Guangghou            | 9         | 79.285176        |
| Port Said            | 10        | 78.23557         |
| Hong Kong            | 11        | 77.648186        |
| Cai Mep              | 12        | 73.411131        |
| <b>Algeciras</b>     | <b>13</b> | <b>73.089835</b> |
| Mawan                | 14        | 72.78143         |
| Shekou               | 15        | 72.422481        |
| Tianjin              | 16        | 70.245532        |
| Yokohama             | 17        | 70.033099        |
| Singapore            | 18        | 69.546328        |

“The development of high-quality and efficient container port infrastructure is a key contributor to successful, export-led growth strategies both in developing and developed countries”.

Mr. Martin Humphreys, Lead Transport Economist and Global Lead for Transport Connectivity and Regional Integration in the World Bank.





# PORT BAY OF ALGECIRAS: GLOBAL MARITIME CONNECTIVITY

23 shipping lines 142 regular services 200 ports 70 countries

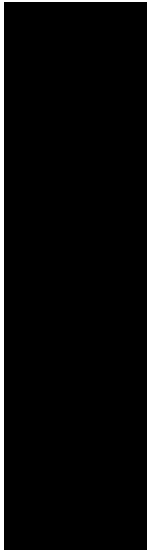
Containership Alliances

2M ALLIANCE  
OCEAN ALLIANCE  
THE ALLIANCE

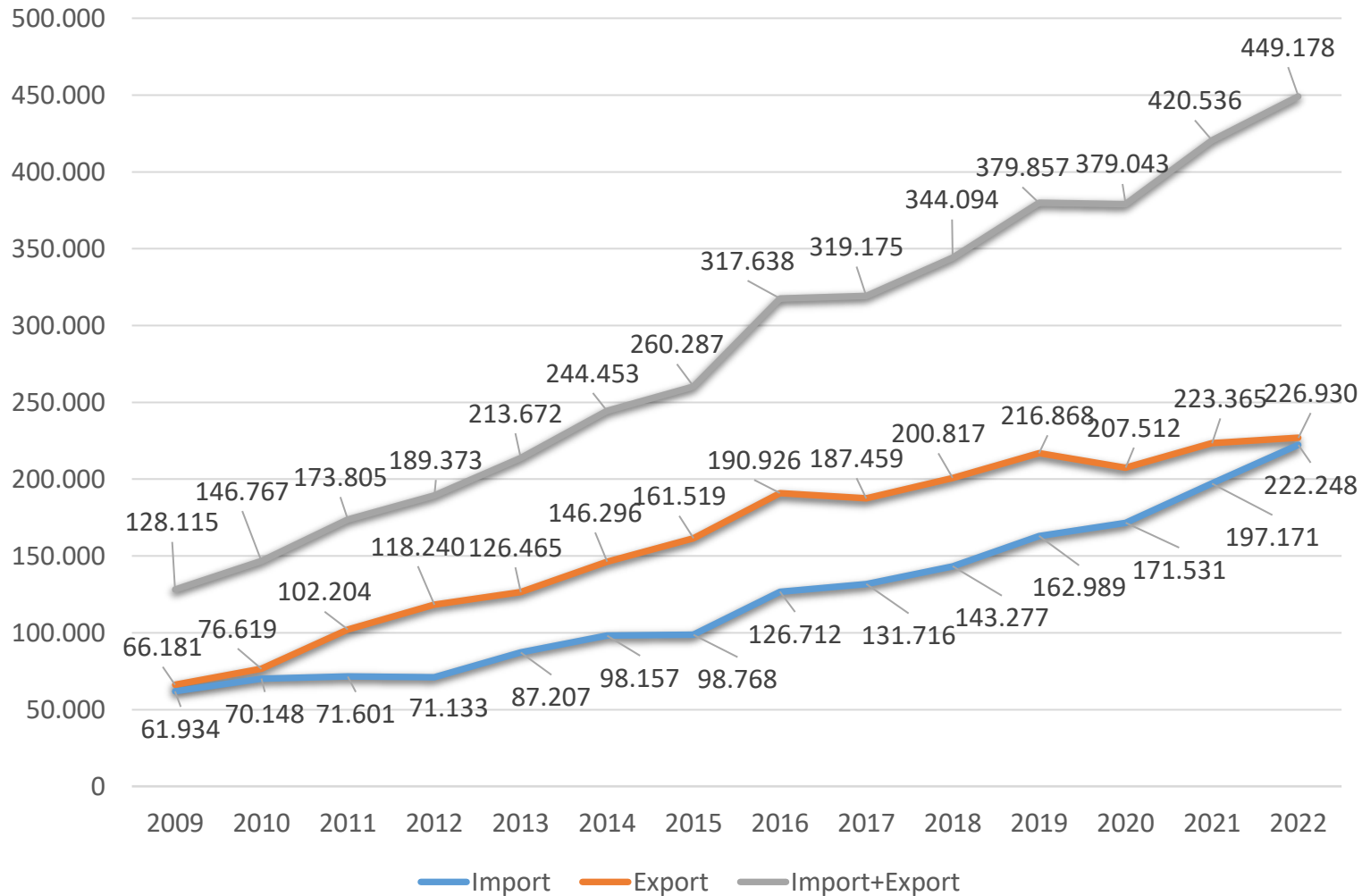


Direct Investment in Algeciras

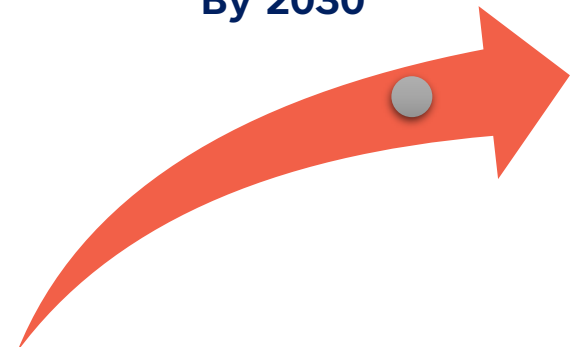




# PORT OF ALGECIRAS IMPORT & EXPORT: 2009 – 2022 (FULL TEUs)



**660,000**  
expected Import-Export  
full TEUs  
By 2030



**+250.6%**  
Import-Export full TEUs  
2009-2022

**+7.07%**  
Import-Export full TEUs  
2021-2022



# MARITIME CONNECTIVITY – ALGECIRAS – TURKISH PORTS

## Direct Connections - Transit Times

|                  | FROM TÜRKİYE | FROM ALGECIRAS |
|------------------|--------------|----------------|
| Aliaga:          | 4 days       | 13 days        |
| Izmir:           | 4 days       | 15 days        |
| Gemlik:          | 5 days       | 11 days        |
| Izmit Korfezi:   | 6 days       | 8 days         |
| Mersin:          | 6 days       | 9 days         |
| Ambarli:         | 8 days       | 6 days         |
| Gebze:           | 13 days      | 12 days        |
| Safiport-Derince | 15 days      | 10 days        |
| Iskenderun:      | 13 days      | 16 days        |

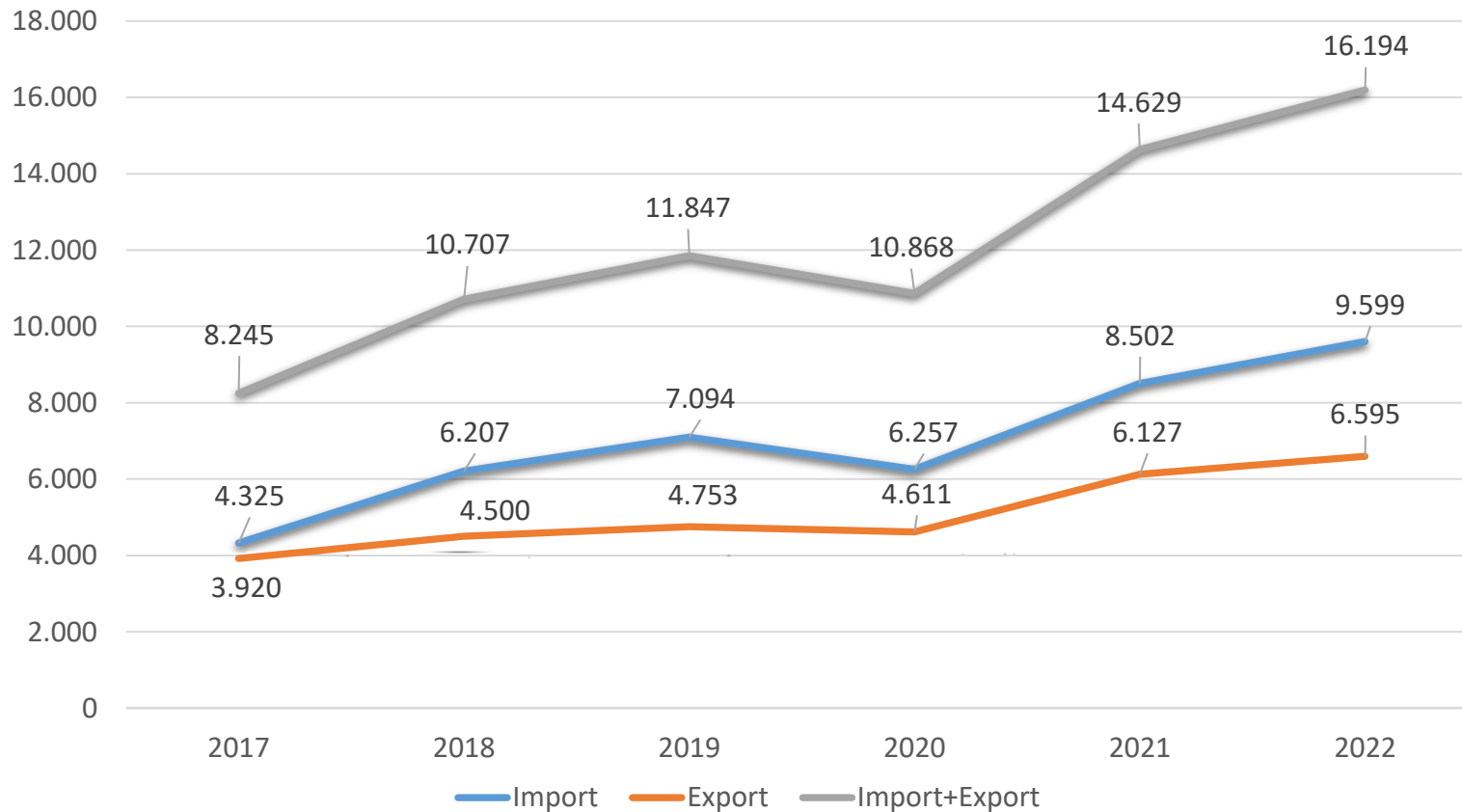
Direct connection with 9 Turkish Ports  
Served by 12 container shipping lines





# PORT OF ALGECIRAS - TÜRKİYE IMPORT & EXPORT EVOLUTION 2017 -2022 (FULL TEUs)

**TÜRKİYE**  
**ALGECIRAS 3RD IMPORT+EXPORT CUSTOMER AFTER CHINA & USA**



**+96.41%**  
**Import-Export full TEUs**  
**2017-2022**

**+12.67%**  
**12,029 Imp. & Exp. full TEUs**  
**JAN. – AUG. 2023**



# ALGECIRAS PORT – TÜRKİYE IMPORT & EXPORT CONTAINERIZED CARGO 2022



## 2022 – Import Top 10 Products

| Code | Description  | Tons   |
|------|--|--------|
| 1509 | Olive oil and its fractions, whether or not refined                | 17.387 |
| 7204 | Ferrous products obtained by direct reduction of iron ore          | 14.415 |
| 2506 | Quartz (other than natural sands)                                  | 11.075 |
| 3907 | Polyacetals, other polyethers and epoxide resins, in primary forms | 4.121  |
| 7229 | Wire of other alloy steel  | 2.897  |
| 4411 | Fireboard of wood or other ligneous materials                      | 2.845  |
| 7308 | Structures and parts of structures of iron or steel                | 2.653  |
| 3920 | Other plates, sheets, film, foil and strip, of plastics            | 2.535  |
| 7217 | Wire of iron or non-alloy steel                                    | 2.485  |
| 2526 | Natural steatite, whether or not roughly trimmed or merely cut     | 2.040  |

## 2022 – Export Top 10 Products

| Code | Description  | Tons   |
|------|--|--------|
| 3901 | Polymers of ethylene, in primary forms                                     | 26.721 |
| 2917 | Polycarboxylic acids, their anhydrides, halides, peroxides and peroxyacids | 18.547 |
| 5201 | Cotton, not carded or combed   | 10.783 |
| 7219 | Flat-rolled products of stainless steel, of a width of 600 mm or more      | 8.279  |
| 1520 | Glycerol, crude; glycerol waters and glycerol lyes                         | 4.304  |
| 3817 | Mixed alkylbenzenes and mixed alkyl-naphthalenes                           | 3.536  |
| 3915 | Waste, parings and scrap, of plastics                                      | 2.230  |
| 4707 | Recovered (waste and scrap) paper of paperboard                            | 1.687  |
| 2833 | Sulphates, alums, peroxosulphates (persulphates)                           | 1.679  |
| 7220 | Flat-rolled products of stainless steel, of a width of less than 600 mm    | 1.450  |



# MARITIME CONNECTIVITY – AFRICAN & AMERICAN MARKETS

## AFRICA

Directly linked with 43 Ports and 24 countries



## AMERICA

Direct connection with 38 Ports in 16 Countries



South and West Africa:  
21 services  
9 shipping lines

ALG → DAKAR 4 Days  
 ALG → ABIDJAN 11 Days  
 ALG → TEMA 11 Days  
 DAKAR → ALG 6 Days  
 TIN CAN → ALG 13 Days  
 PORT ELIZABETH → ALG 16 Days



USA/Canada: 23 services  
 11 shipping companies  
 Central America/Caribbean:  
 7 services  
 6 shipping lines.  
 South America: 9 services  
 5 shipping lines.

ALG → SANTOS 4 Days  
 ALG → MANZANILLO 11 Days  
 ALG → BUENOS AIRES 11 Days  
 CARTAGENA → ALG 10 Days  
 MOIN → ALG 12 Days  
 PAITA → ALG 20 Days



ARKAS Line





# ALGECIRAS PORT PLATFORM FOR THE DISTRIBUTION OF TURKISH CONTAINERIZED CARGO 2022



## Distribution platform for other Spanish Ports Top 10 Products

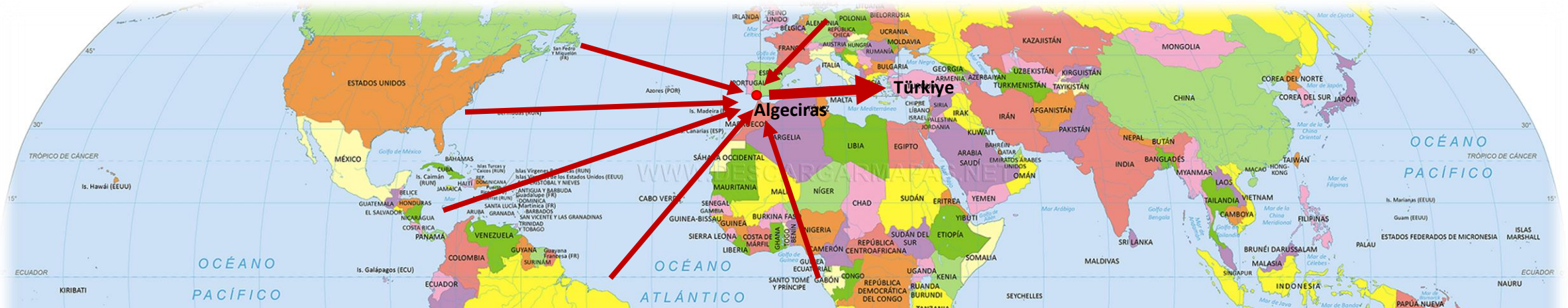
| Code | Description  | Tons   |
|------|--|--------|
| 2529 | Feldspar; leucite; nepheline and nepheline syenite; fluorspar.         | 64.757 |
| 2506 | Quartz (other than natural sands)                                      | 48.303 |
| 0713 | Dried leguminous vegetables, shelled, whether or not skinned or split. | 5.216  |
| 2508 | Other clays (not including expanded clays of heading 6806)             | 2.692  |
| 6802 | Worked monumental or building stone and articles thereof...            | 2.579  |
| 7005 | Float glass and surface ground or polished glass, in sheets...         | 2.215  |
| 2515 | Marble, travertine, ecaussine and other calcareous monumental...       | 1.564  |
| 2530 | Mineral substances not elsewhere specified or included.                | 1.463  |
| 7007 | Safety glass, consisting of toughened (tempered) or laminated glass.   | 1.317  |
| 8450 | Household or laundry-type washing machines, including machines ...     | 1.095  |

## Distribution Platform for other countries Top 10 Products

| Code | Description  | Tons    |
|------|--|---------|
| 1902 | Pasta, whether or not cooked or stuffed (with meat or other ...)           | 272.059 |
| 1101 | Wheat or meslin flour.   | 161.864 |
| 0207 | Meat and edible offal, of the poultry of heading 0105, fresh, chilled ...  | 109.977 |
| 6802 | Worked monumental or building stone and articles thereof...                | 109.527 |
| 6907 | Ceramic flags and paving, hearth or wall tiles; ceramic mosaic cubes ...   | 98.683  |
| 2836 | Carbonates; peroxocarbonates (percarbonates)                               | 73.014  |
| 2009 | Fruit or nut juices (including grape must and coconut water) ...           | 58.981  |
| 7214 | Other bars and rods of iron or non-alloy steel, not further worked than... | 51.800  |
| 2520 | Gypsum; anhydrite; plasters (consisting of calcined gypsum ...             | 50.840  |
| 2833 | Sulphates; alums; peroxosulphates (persulphates)                           | 47.890  |



# ALGECIRAS PORT PLATFORM FOR THE DISTRIBUTION OF CONTAINERIZED CARGO TO TÜRKİYE



## Distribution platform from other Spanish Ports Top 10 Products

| Code | Description  | Tons   |
|------|--|--------|
| 6802 | Worked monumental or building stone and articles thereof...                | 12.281 |
| 2301 | Flours, meals and pellets, of meat or meat offal of fish or crustaceans... | 8.428  |
| 2606 | Aluminium ores and concentrates.   | 5.627  |
| 3915 | Waste, parings and scrap, of plastics.                                     | 3.959  |
| 4707 | Recovered (waste and scrap) paper or parerboard                            | 3.452  |
| 8545 | Carbon electrodes, carbon brushes, lamp carbons, battery carbons...        | 3.078  |
| 3907 | Polyacetals, other polyethers and epoxide resins, in primary forms...      | 1.790  |
| 7205 | Granules and powders, of pig iron, spiegleisen, iron or steel.             | 1.239  |
| 2801 | Flourine, chlorine and iodine.   | 1.055  |
| 3911 | Petroleum resins, coumaron-indene resins, polyterpenes...                  | 855    |

## Distribution Platform from other countries Top 10 Products

| Code | Description  | Tons    |
|------|--|---------|
| 0803 | Bananas, including plantains, fresh or dried.                              | 350.510 |
| 0802 | Other nuts, fresh or dried, whether or not shelled or peeled.              | 128.133 |
| 5201 | Cotton, not carded or combed   | 125.025 |
| 3901 | Polymers of ethylene, in primary forms.                                    | 65.749  |
| 0303 | Fish, frozen, excluding fish fillets and other fish meat of heading 0304.  | 57.136  |
| 3904 | Polymers of vinyl chloride or of other halogenated olefins...              | 57.033  |
| 1207 | Other oil seeds and oleaginous fruits, whether or not broken.              | 42.156  |
| 2301 | Flours, meals and pellets, of meat or meat offal of fish or crustaceans... | 41.864  |
| 8708 | Parts and accessories of the motor vehicles of headings 8701 to 8705.      | 39.101  |
| 0207 | Meat and edible offal, of the poultry of heading 0105, fresh, chilled ...  | 26.373  |





# STRAIT OF GIBRALTAR : MARITIME BRIDGE LINKING AFRICA AND EUROPE





**ALGECIRAS – CEUTA – ALGECIRAS**  
RORO/ROPAX LINES






Algeciras Port  Autoridad Portuaria de Ceuta 

4 ROPAX & 1 RORO – 13 ROUND TRIPS/DAY (+/- 16 IN SUMMER TIME)

**ALGECIRAS – TANGER MED – ALGECIRAS**  
RORO/ROPAX LINES

Algeciras Port  TANGER MED PORT AUTHORITY 

7 ROPAX & 2 RORO – 23 ROUND TRIPS/DAY (+/- 30 IN SUMMER TIME)

**TARIFA – TANGER CITY - TARIFA**  
ROPAX LINES

Puerto de Tarifa  TANGIER CITY PORT MANAGEMENT COMPANY 

2 ROPAX – 12 ROUND TRIPS/DAY (+/- 16 IN SUMMER TIME)



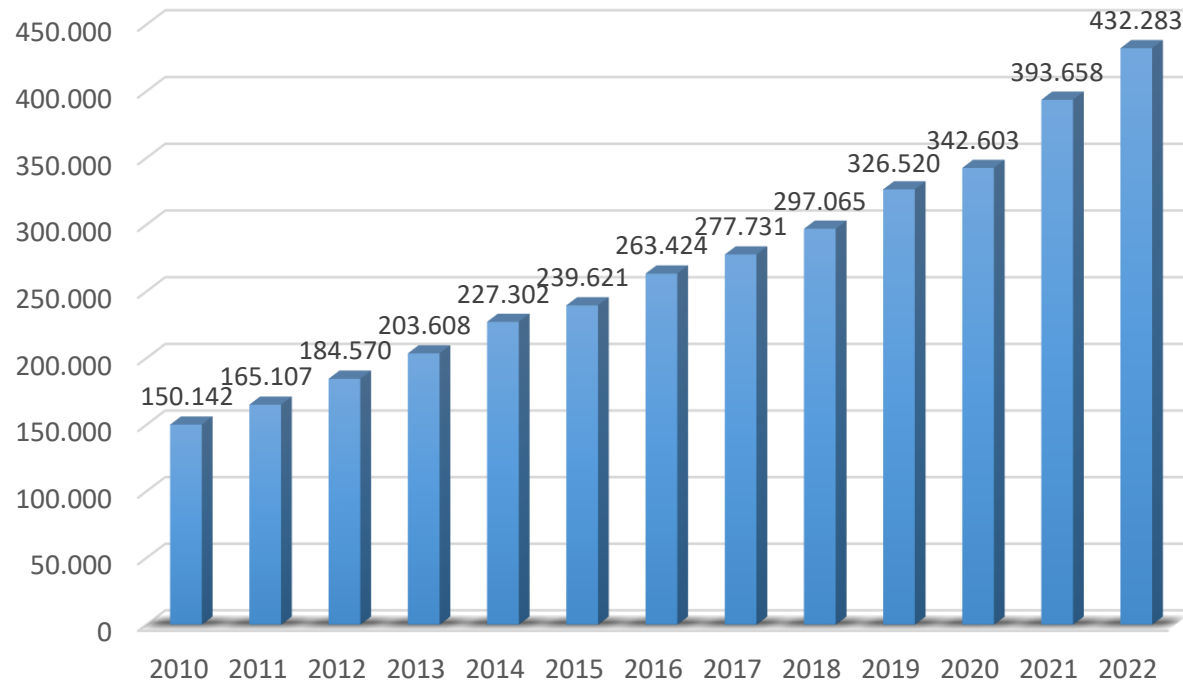
# RORO & ROPAX TRAFFIC ALGECIRAS–TANGER MED: EVOLUTION AND FORECAST



## Algeciras - Tanger Med – Algeciras:

The only operative roro link between Spain and Morocco during the pandemic

### Evolution 2010-2022



+187.9 %  
2010-2022

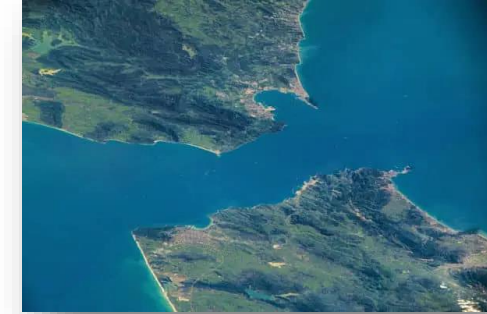
+9.8 %  
2021/2022

**2030**  
**Roro traffic**  
**forecast:**  
**800,000 trucks**





# HERCULES PLAN – INTERMODAL STRATEGY



## The seven Algeciras Port medium-term goals



1. GOODS TRACKING THROUGH THE MARITIME BRIDGE TANGER MED – ALGECIRAS

2. ISLA VERDE INTERIOR: INFRASTRUCTURE ENHANCEMENT

3. ISLA VERDE EXTERIOR: CONSTRUCTION OF 2nd HEAVY GOOD VEHICLES TERMINAL

4. LOCATION OF NEW SITES EXTERNAL TO THE PORT FOR RORO MANAGEMENT AND SERVICE

5. BORDER INSPECTION POST: DIGITALIZATION AND STAFFING

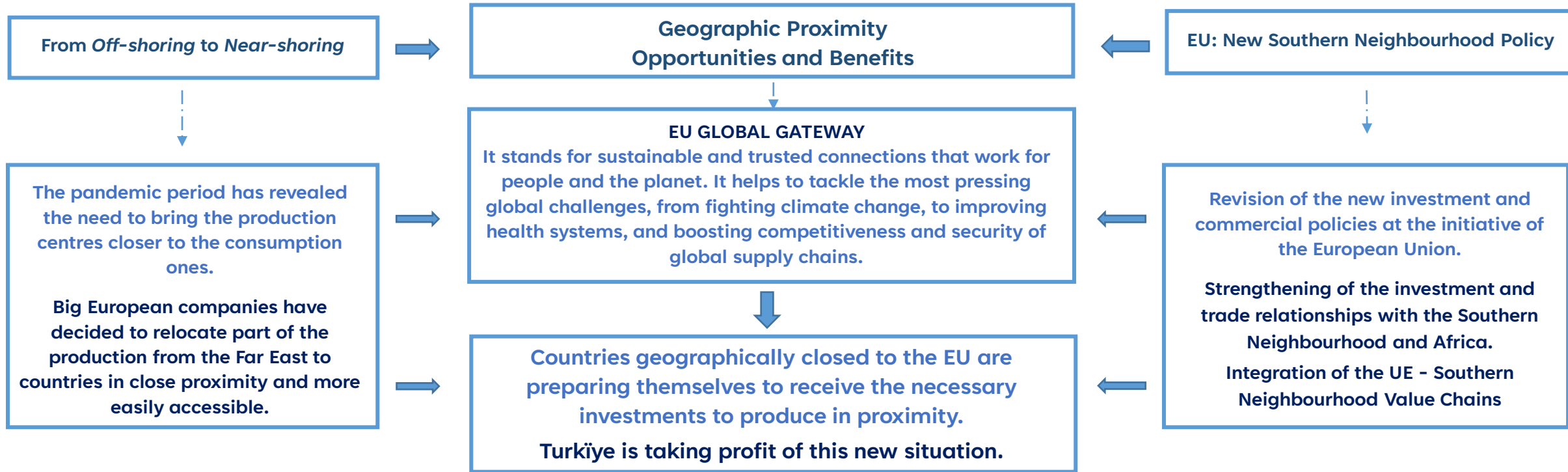
6. SAN ROQUE INTERMODODAL AREA: ALBA2 INTERMODODAL AREA

7. BOOSTING RAIL TRAFFIC: INFRASTRUCTURES AND PROJECTS



# FROM GLOBAL CHAINS TO REGIONAL VALUE CHAINS

## Regional Value Chains Integration U.E. – TÜRKİYE Case

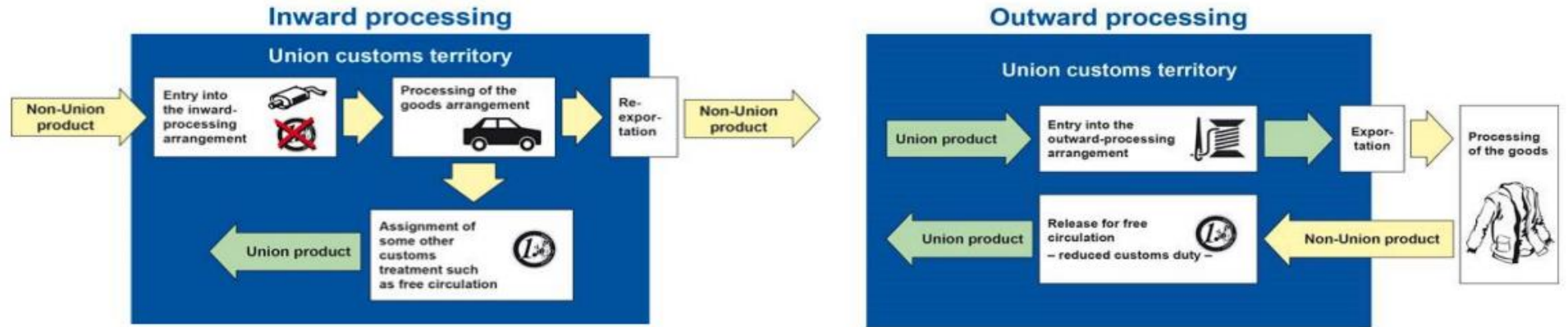


**STRAIT OF GIBRALTAR**  
**LOGISTICS NODE FOR EURO-AFRICAN SUPPLY CHAINS**  
**STRATEGIC POINT OF CONFLUENCE OF REGIONAL AND VALUE CHAINS**



# PORT OF ALGECIRAS – BUSINESS OPPORTUNITIES

**Don't pay import TAX!!**  
The ATR Certificate we provide grants Zero Import Duty for EU.



Triangular trade Operations between Türkiye and other non-EU markets via Algeciras



Your door to the African market.

Textile sector



Automotive sector



Car parts



Machinery





# PORT OF ALGECIRAS – RAILWAY CONNECTIVITY AND TERMINALS

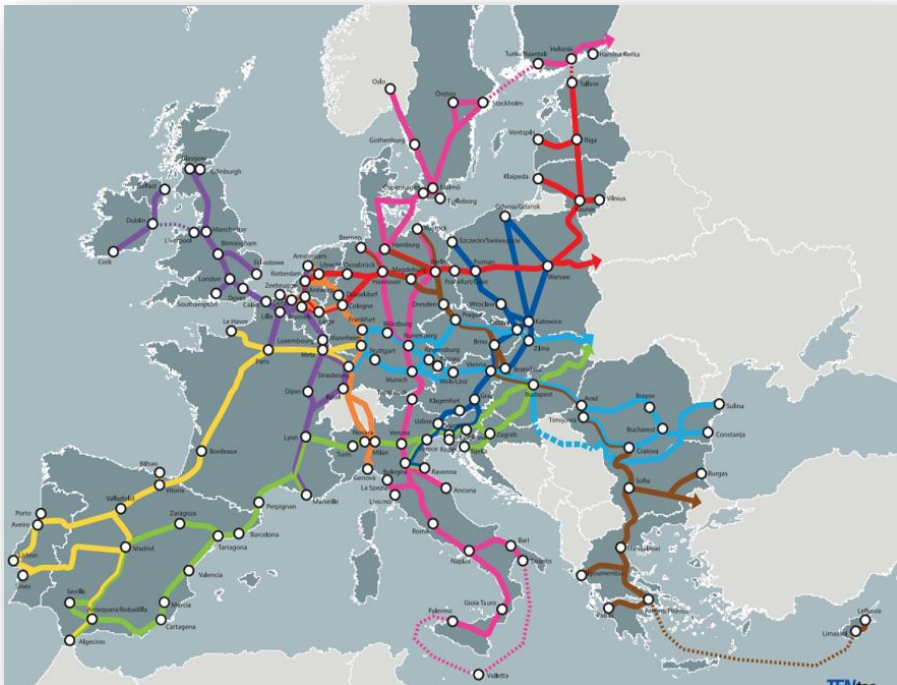
**PORT OF ALGECIRAS**  
CORE SOUTHERN  
GATEWAY OF ATLANTIC  
AND MEDITERRANEAN EU  
CORRIDORS



Two Rail Terminals  
T1: Container Activity (3 rails - 650m)  
T2: Rolling Motorway (3 rails - 400m)

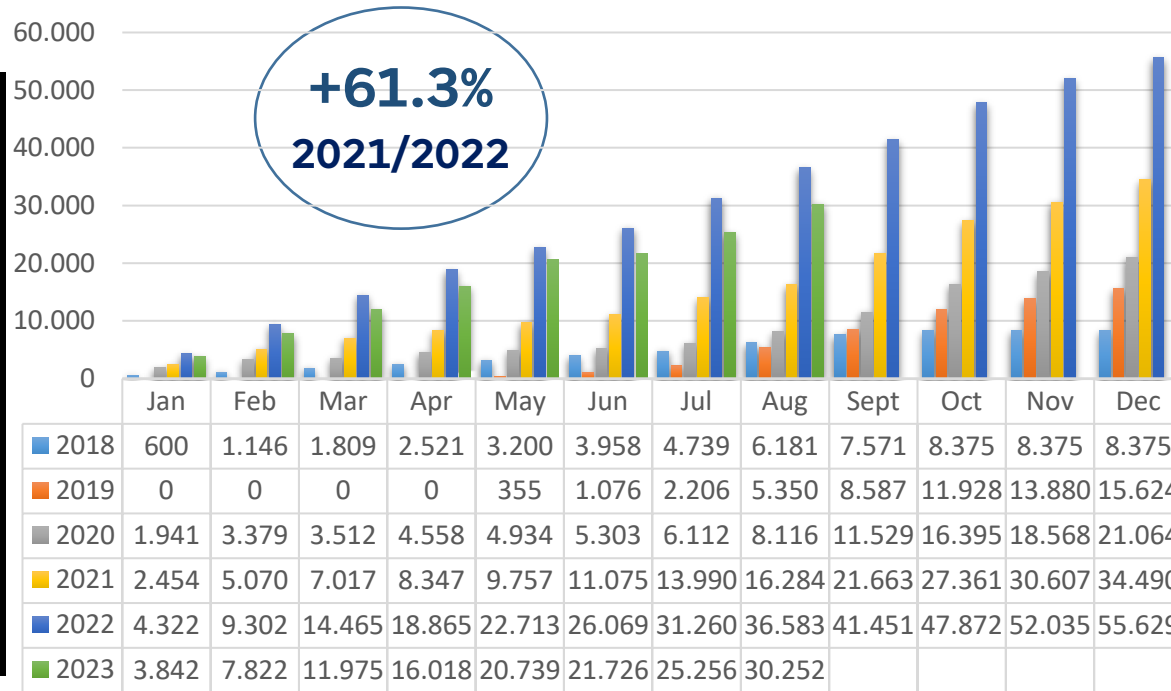
35  
PLATAFORMAS  
(40')

1,350 Tons  
Pulling  
capacity





# RAILCARGO EVOLUTION 2018- AUGUST 2023 (TEUs)



**+61.3%**  
**2021/2022**



## Algeciras – Saragossa Rolling Motorway Project

Reducing road truck traffic  
Reducing carbon footprint  
Adding another logistics option for operators





**Trains 2022: 1,163: +21.78%**

**TEUs 2022: 57,345: +66.3%**

**Net tons 2022: 299,962: +51.1%**

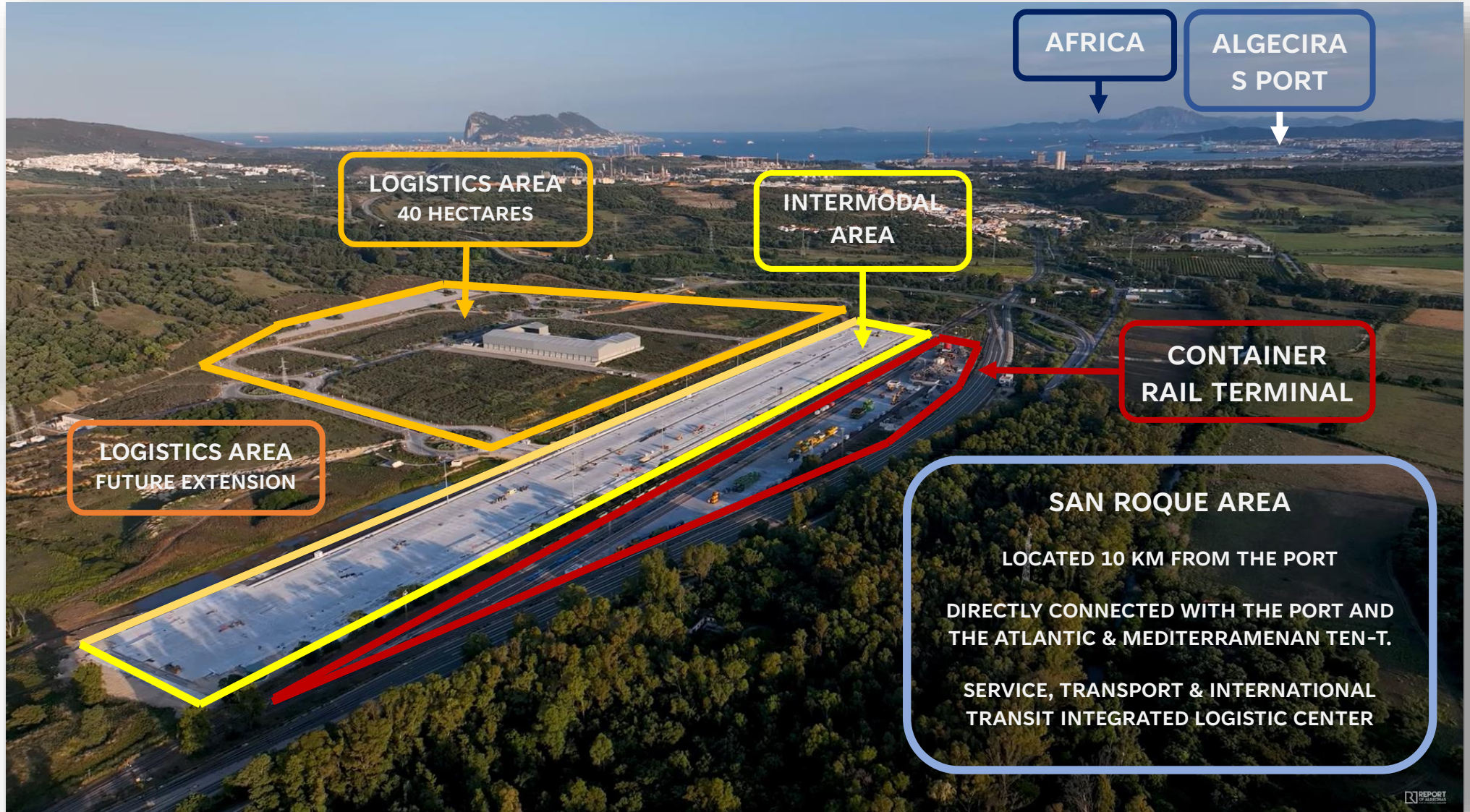
40% DISCOUNT ON  
PORT DUES FOR  
CARGO ARRIVING  
OR DEPARTING THE  
PORT BY RAIL

**2022: 29,143 Trucks withdrawn from the road**

**January - August 2023: 15,512**



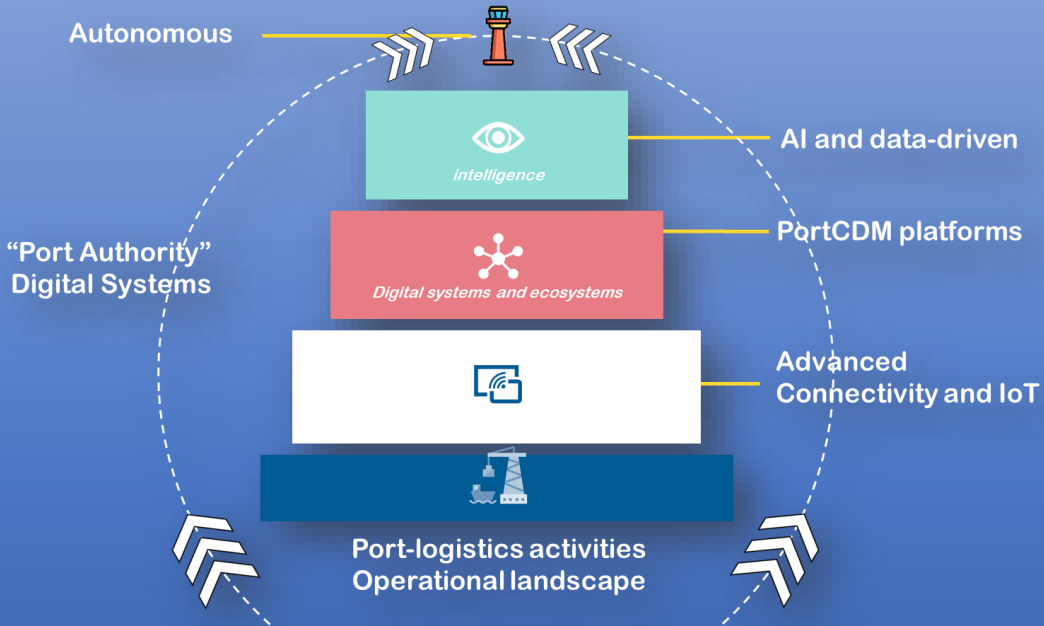
# SAN ROQUE INTERMODAL AND LOGISTICS AREA



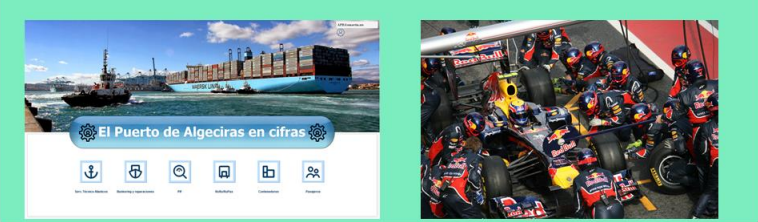




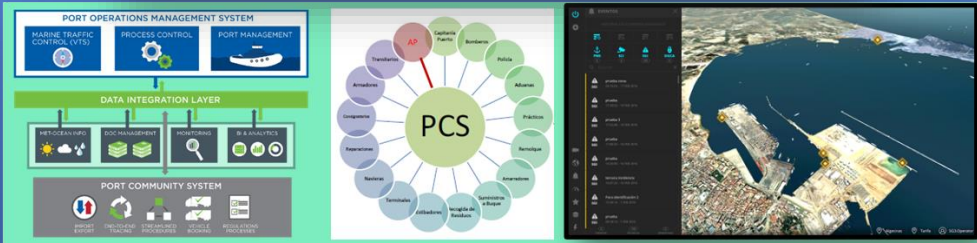
# DIGITAL TRANSFORMATION STRATEGY



Algeciras Port Digital Twin



Analytics – Port Collaborative & Data Sharing



Vessel Traffic – Single Window – Virtual Security



# THE PORT OF ALGECIRAS AS GREEN BUSINESS FACILITATOR

## Strategic Guidelines



### Environmental



CS 3. ENERGY TRANSITION & SUSTAINABLE INFRASTRUCTURES



CS 4. ECOSYSTEMS & BIODIVERSITY



CS 6. ENVIRONMENTAL QUALITY



CS 7. ROUND ECONOMY & GREEN DEAL



CS 10. CLIMATE CHANGE



### Economical



CS 1. SUSTAINABLE GOVERNANCE



CS 5. INNOVATIVE & SUSTAINABLE PORT



CS 9. DISCLOSURE & TRANSPARENCY



### Social



CS 2. CITY/PORT INTEGRATION



CS 8. HEALTH & SOCIAL WELFARE



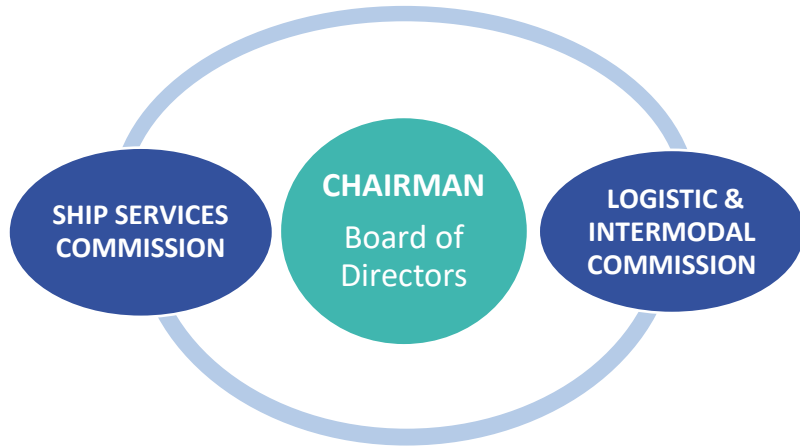
CS 11. TALENT MANAGEMENT



CS 12. REDUCTION OF INEQUALITIES



# COMPORT – Algeciras Bay Port Community Association



✓ Foundation: 1999

✓ Purpose: Promotion

✓ People: More than 150 Members

✓ Product: Algeciras Bay Port and its Port Community Services

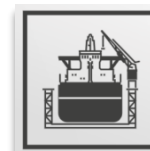
7 días 24h

 ALGECIRAS  
PORT COMMUNITY - COMPORT

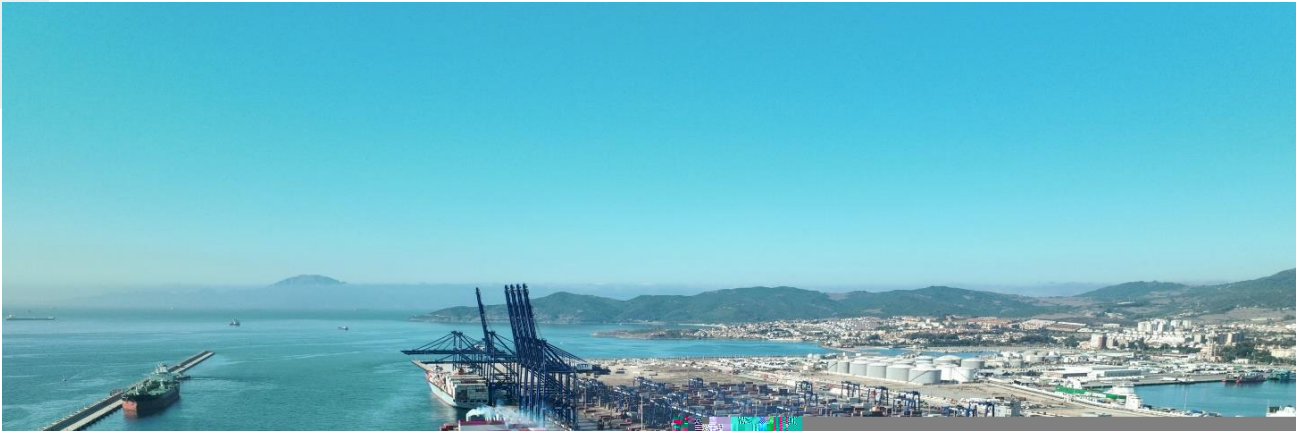
[www.comport.es](http://www.comport.es)

[algeciras@webcomport.es](mailto:algeciras@webcomport.es)

**TEAM work – JOINT promotion**



# Algeciras Bay Port Community – Logistics & Intermodal SERVICES



- ➔ Container and bulk terminals
- ➔ Heavy Vehicles Terminals
- ➔ Rail Terminals
- ➔ Intermodal Terminal
- ➔ Freight Forwarders
- ➔ Customs Procedures
- ➔ Bonded Warehouses
- ➔ Cold Storage Facilities
- ➔ Logistics Areas
- ➔ Free Zones



# Algeciras Bay Port – Border Control



## Customs and Inspections Services

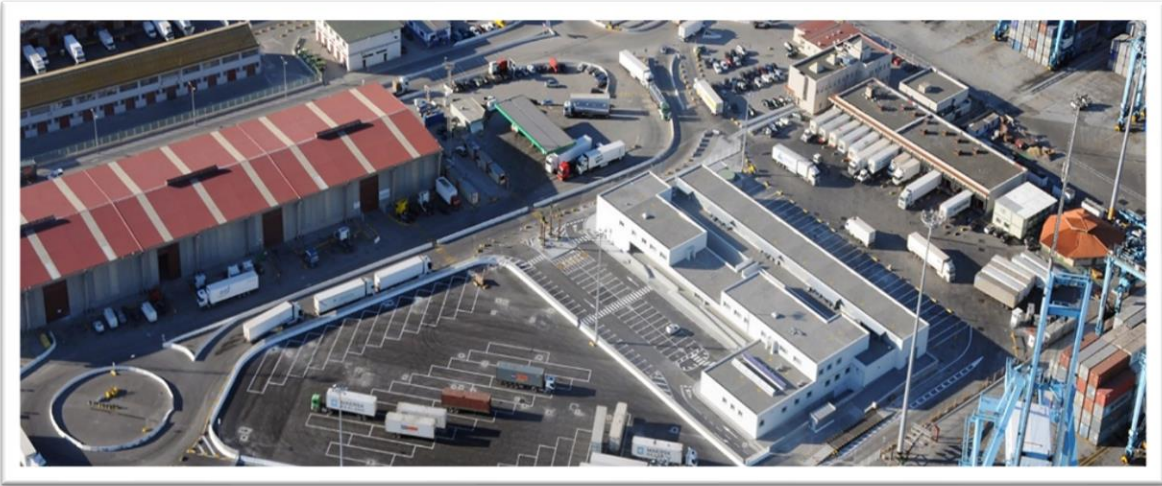
**CUSTOMS**  
Truck and Container Scanning  
24-Hour Digital Processing



Foreign Health



Animal Health



**Algeciras Border Control Post (BCP)**



Phytosanitary Service



**S.O.I.V.R.E.**  
(Exports inspections & Regulations)

# COMPORT, Algeciras Bay Port Community Association



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