

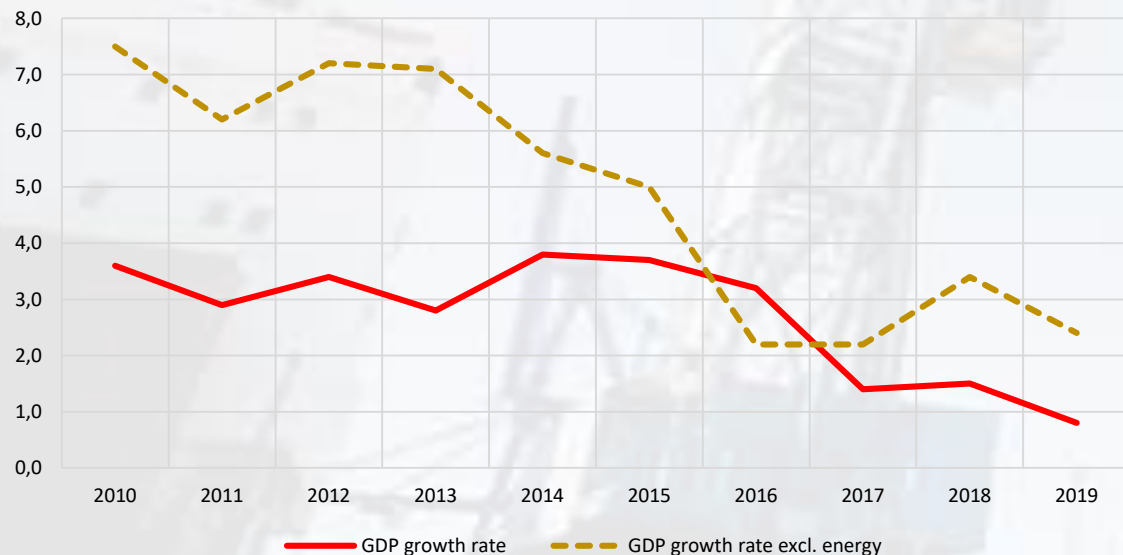
# Maritime sector Algeria

*Presentation by  
MEYS Emerging Markets Research*

# Lower economic growth in Algeria

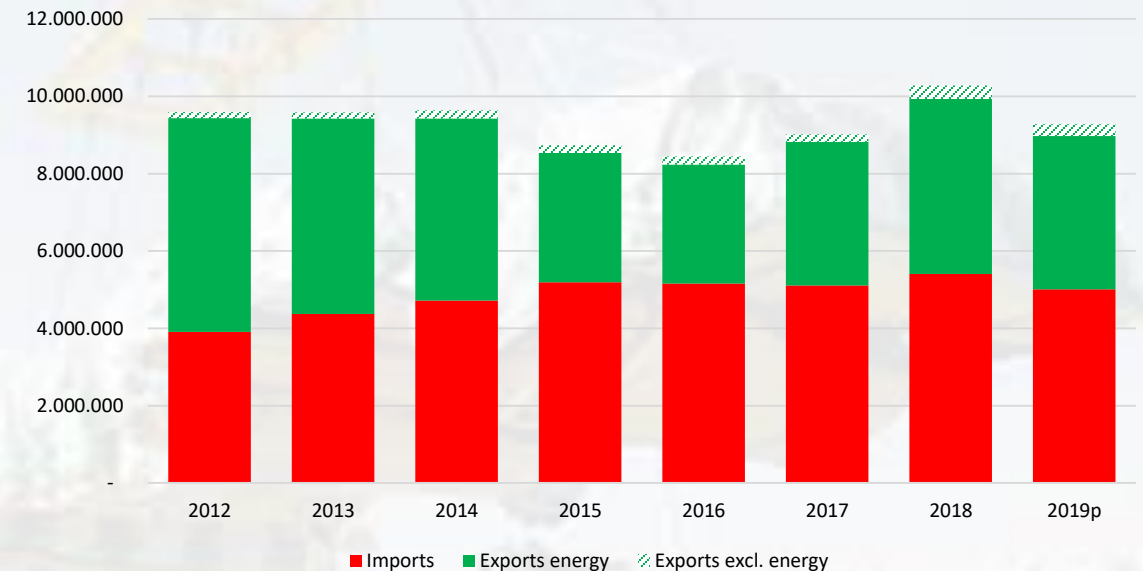
- Economic growth rate in Algeria has been decreasing during last eight years as oil prices dropped significantly
- With a share of 22% in GDP the Energy sector plays a significant role in the country's economy
- Lower domestic economic activities led to a decrease in total foreign trade
- 95% of all Algerian foreign trade is by maritime (sea) transport
- Exports of Algeria are dominated by energy products (93% of the total export value)
- Imports are mainly cereals

Economic growth rate Algeria (%)



Source: ONS

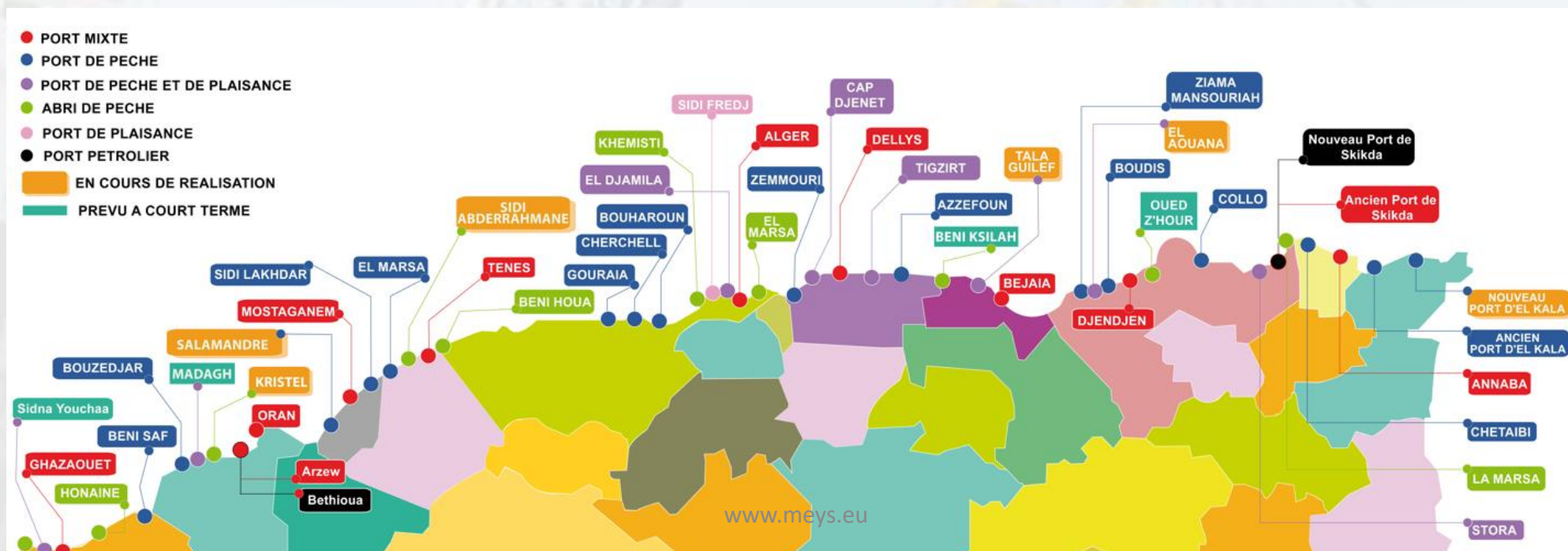
Total foreign trade Algeria (million dinars)



Note: (p) preliminary figures  
Source: Customs Algeria, ONS

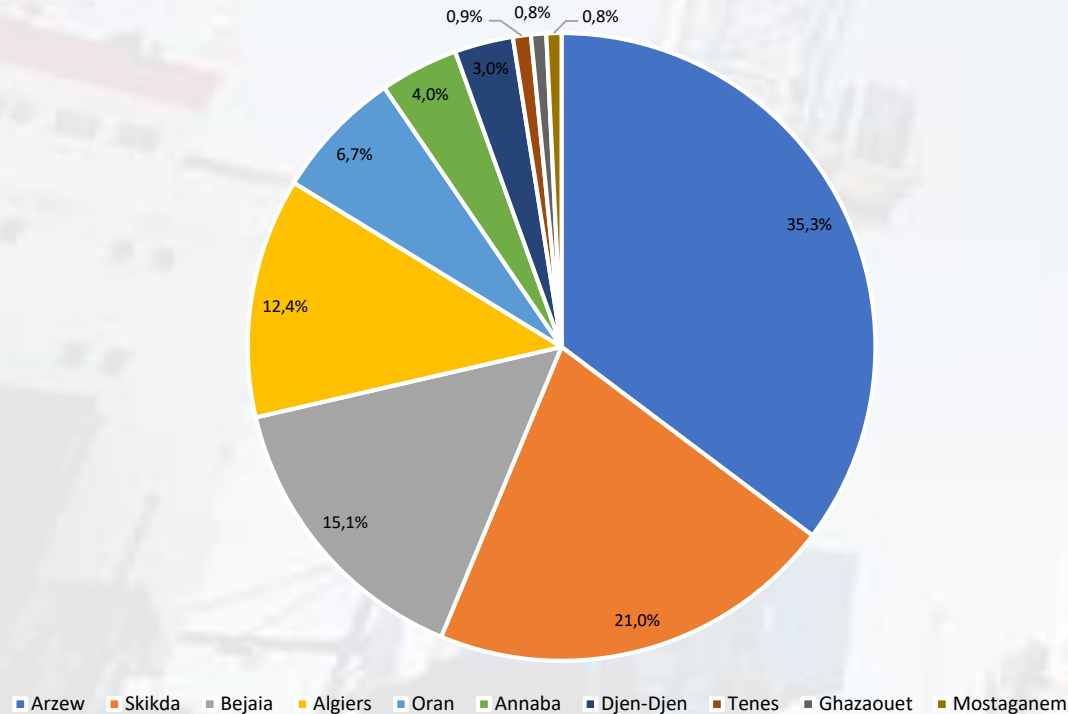
# Port infrastructure Algeria

- Coastline of 1280 km
- Commercial ports in Algeria are divided as follows:
  - 35 fishing ports
  - 13 commercial merchandise ports, of which:
    - ✓ 8 general cargo ports: Alger, Oran, Annaba, Mostaganem, Djen-Djen, Ténès, Ghazaouet, Dellys
    - ✓ 3 mixed ports i.e. general cargo and energy products: Bejaia, Skikda old port, Arzew
    - ✓ 2 energy ports: Bethioua, Skikda new port
- In 2019 start of construction works of new deepwater port *Port Centre d'El Hamdania* (total investment 3.3 billion US\$) by an Algerian/Chinese JV; located 90 km West of Algiers near Cherchell, the port when finished can handle annually 6.5 million TEU and 25.7 million tons of goods
- Construction of the new energy *Port Skikda* (total investment 440 million US\$) started in the beginning of 2019 by an Algerian/Chinese JV



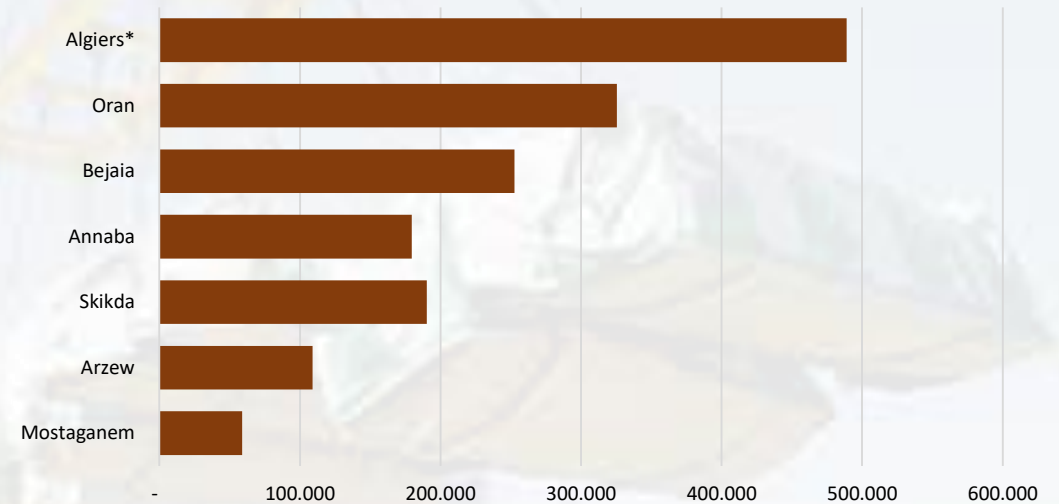
- Measured by global traffic of maritime trade (general cargo and energy products) Port of Arzew largest port in Algeria
- In 2018 Port of Arzew handled 44.8 million tons of goods, of which 90% were exports of energy products (oil & gas)
- Ports of Arzew, Skikda and Bejaia have a combined share of more than 50% in Algeria's total merchandise traffic
- In 2018 and 2019 the ports Arzew, Skikda, Bejaia handled together 75.1 million tons of oilproducts of which Arzew handled alone 39.7 million tons (53%)
- Port of Algiers largest container port in Algeria

Global traffic by Algerian port\*, 2016 (%)



Note: (\*) only ports of company Serport

Container throughput by Algerian port, 2018 (TEU)



Note: (\*) excluding container terminal DP World  
Source: port statistics



# Organization maritime sector Algeria



- Reorganization in 2016 resulting in the establishment of 4 national state owned companies active in transport and logistics:
  - ✓ SERPORT: responsible for the operations of 10 seaports and port logistics
  - ✓ Logitrans Group: responsible for transport of goods and logistics
  - ✓ Transtev: responsible for passenger transport (bus, metro, tramway)
  - ✓ GATMA: responsible for all maritime transport (passenger and cargo)
- Maritime transport companies CNAN (*Compagnie Nationale Algerienne de Navigation*), CNAN Med and CNAN Nord are subsidiaries of GATMA
- National shipbuilding and repair is organised by national state owned company ERENAV (*Entreprise de Réparation Navale*) with 3 shipyards (Algiers, Oran, Bejaïa); ERENAV is a subsidiary of GATMA
- Main port dredging activities is done by state owned company ALDIPH (*Algérienne de Dragage des Infrastructures Portuaires et Hydrauliques*), a subsidiary of state owned company Gitrama (*Groupe d'infrastructures des travaux maritimes*)



## Limited increase of total cargo throughput in Algerian ports

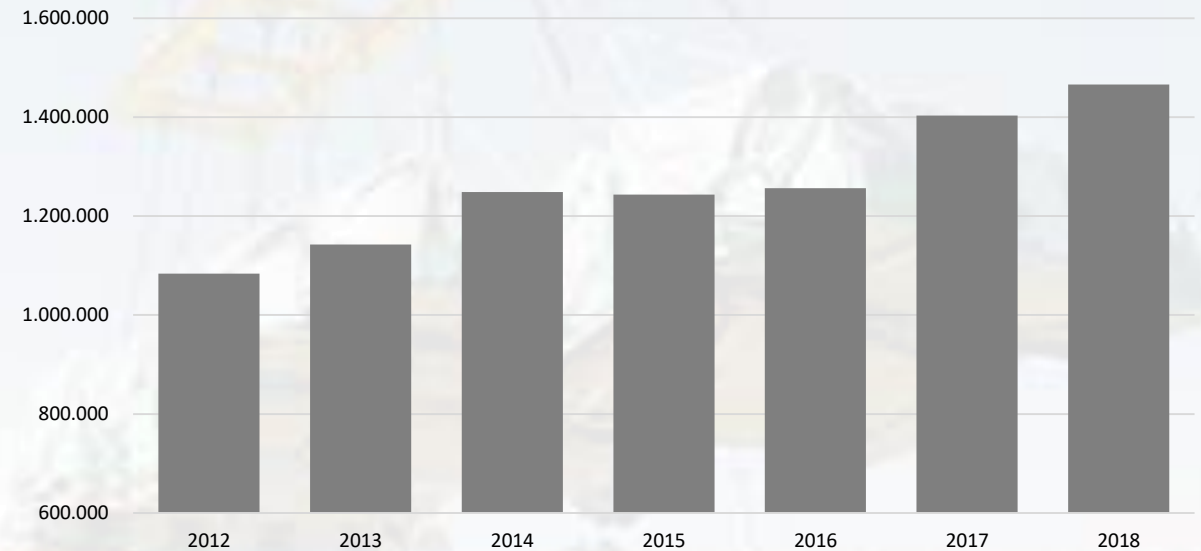
- Algerian company **Groupe SerPort** (*Groupe Services Portuaires*) is responsible for operating 10 Algerian commercial ports: Algiers, Annaba, Arzew, Bejaia, Djen-Djen, Ghazaouet, Mostaganem, Oran, Skikda, Tenes
- Excluding trade in energy products Port of Algiers largest commercial port for general cargo and containers in Algeria
- Besides container terminal of EPAL (Port Authorities Algiers) DP World operate since 2008 container terminal DP World Djazair at Port of Algiers
- Since 2012 slow increase in global container throughput, from 1.1 million TEU to almost 1.5 million TEU in 2018

General cargo throughput Port of Algiers  
(million tons)



Source: Port of Algiers

Total container throughput ports Algeria\*  
(TEU)



Note: (\*) excluding empty containers  
Source: UNCTAD

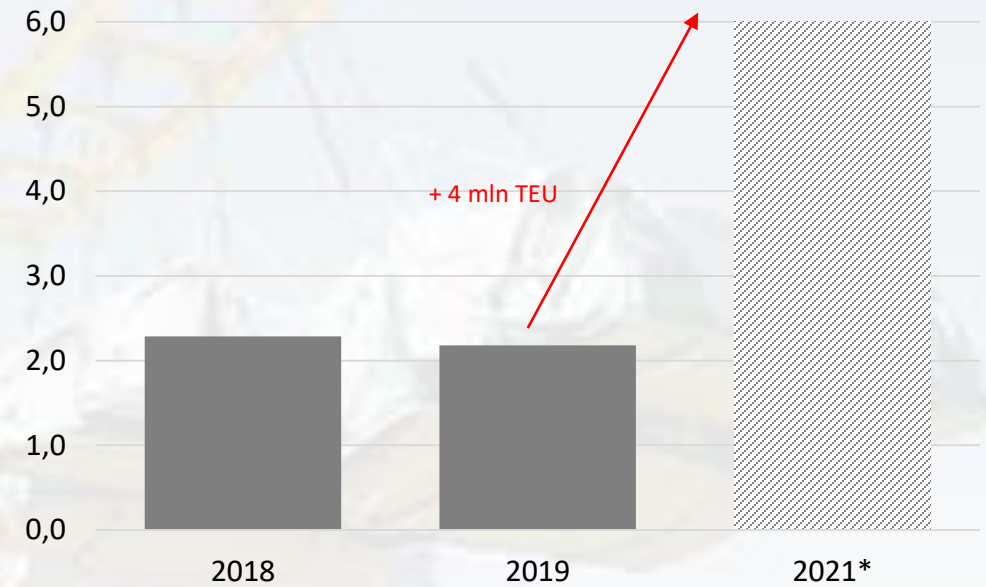
- In 2019 120 million tons of general cargo throughput were handled by the 10 ports of company Serport
- 76 million tons (63%) of general cargo throughput in 2019 were exports
- 75 million tons (63%) of general cargo throughput in 2019 were oil and oil products
- In 2019 almost 2.2 million containers were handled by Serport, of which ¼ by port of Algeria
- By end 2021 container throughput will have tripled due to opening of new container port and extension of terminal capacity at various ports of Serport

**Total general cargo throughput ports Algeria\* (million tons)**



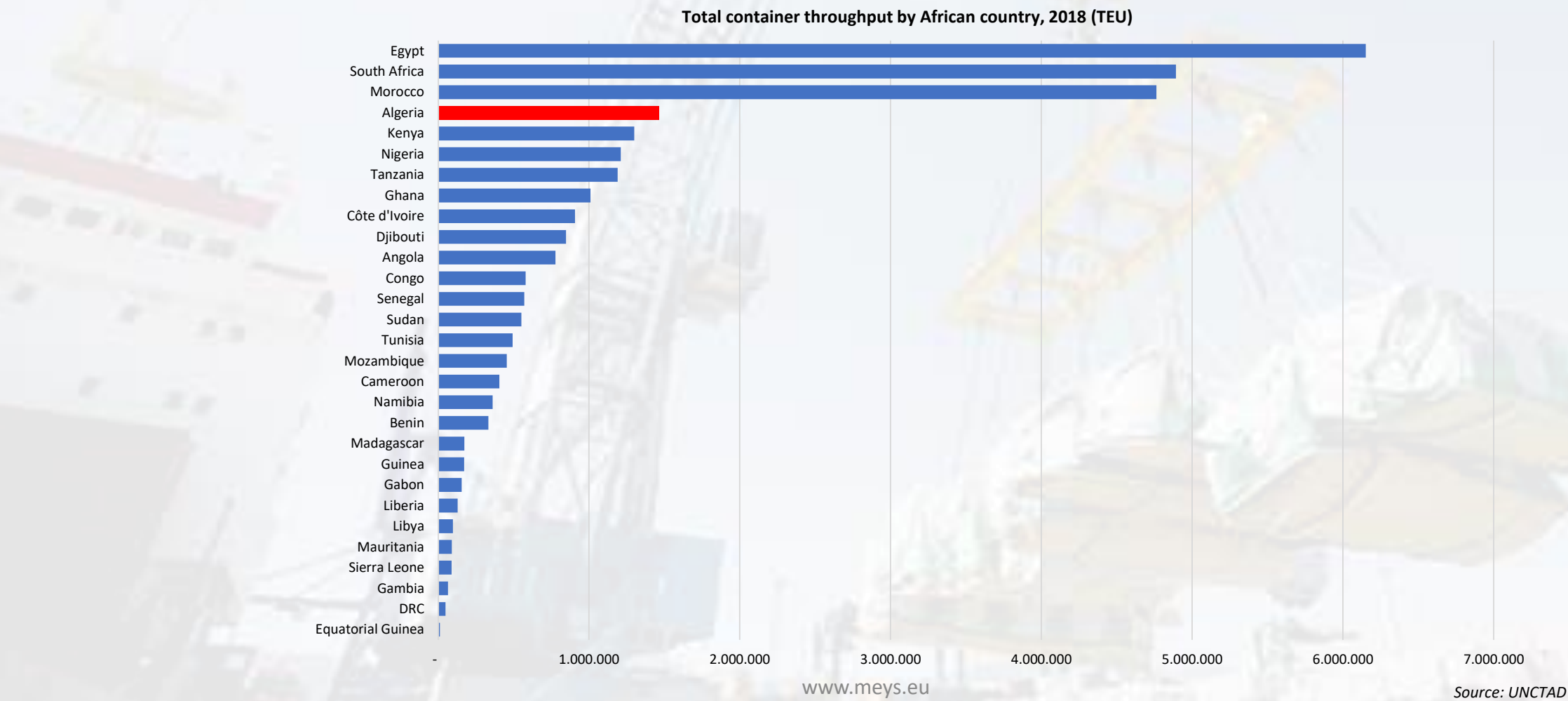
Note: (\*) only figures 10 ports of company Serport  
Source: Serport

**Container throughput ports Algeria\* (million TEU)**



Note: (\*) including empty containers  
Source: Serport

- Container throughput ports of Algeria is relatively limited
- In 2018 Egypt had the largest container throughput in Africa, but will be surpassed by Morocco in 2019 with the opening of Tanger Med II
- Algeria's total container throughput is around 1/3 of Morocco's total annual container throughput in 2018





## Port dredging

- Port dredging activities in Algeria mainly done by state owned company ALDIPH
- Smaller dredging company active in Algeria is private Algerian company Celar
- Local port authorities are responsible for carrying out dredging activities in their respective ports



## Size national fleet of Algeria is limited

- Total number of vessels currently sailing under national flag is limited to 16:
  - 9 general cargo vessels
  - 4 multi-purpose vessels
  - 3 Ro-Ro vessels
- Total capacity 763,000 DWT, of which general cargo 150,000 DWT
- 3% of total maritime transport (cargo + container) are carried out by the national fleet
- Since 2016 public company *Groupe Algérien de Transport Maritime (GATMA)* is responsible for the activities of the national fleet -> general objective is to increase the share of cargo transported to Algeria by Algerian flagged vessels



- Shipping company **CMA CGM** cooperates with CNAN NORD since 2016

### RO-RO services

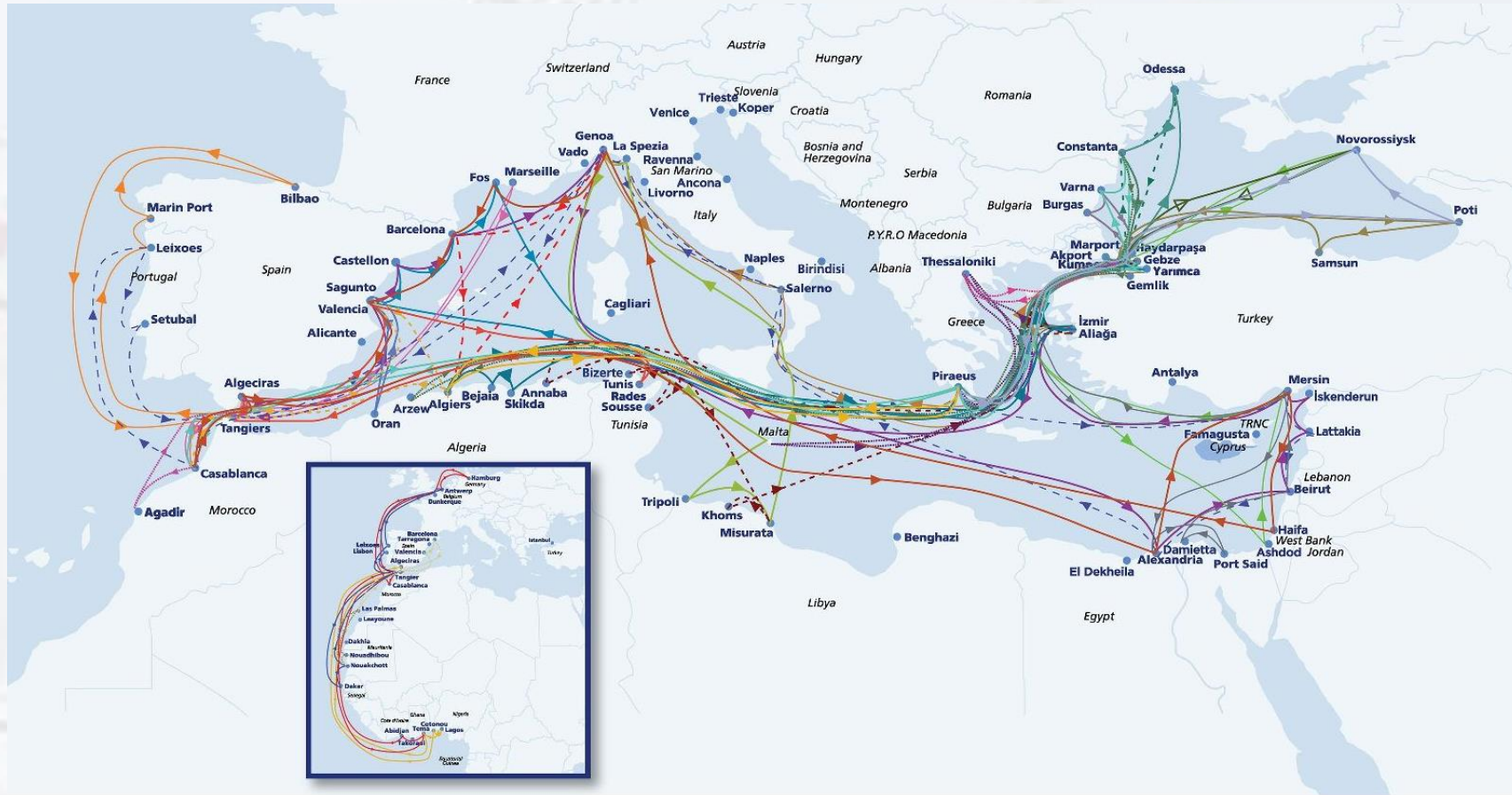


### Container services





- Turkish maritime company **Arkas Line** cooperates with CNAN Med and carries out container services between Europe and 6 ports in Algeria





- **Maersk** operates feeder services between Algeria, Spain, France, Italy, and Malta



**Thank you for your attention**

*MEYS Emerging Markets Research*

*info@meys.eu*

*www.meys.eu*