

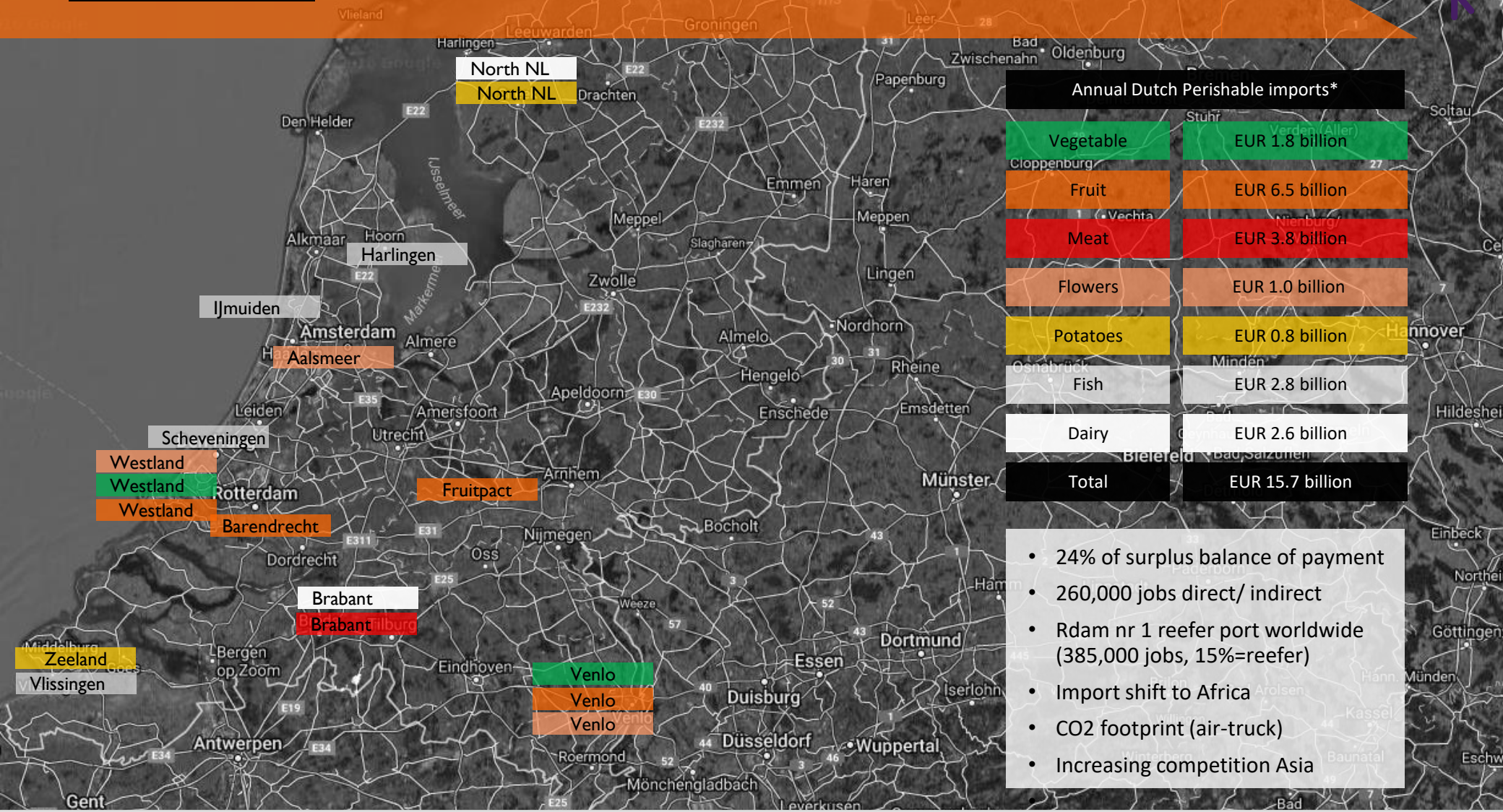


AGROLOGISTICS FORUM CAIRO

6 DECEMBER 2022

**FLYING
SWANS**

DUTCH INTEREST: PERISHABLE INDUSTRY IS KEY TO DUTCH ECONOMY



Annual Dutch Perishable imports*	
Vegetable	EUR 1.8 billion
Fruit	EUR 6.5 billion
Meat	EUR 3.8 billion
Flowers	EUR 1.0 billion
Potatoes	EUR 0.8 billion
Fish	EUR 2.8 billion
Dairy	EUR 2.6 billion
Total	EUR 15.7 billion

- 24% of surplus balance of payment
- 260,000 jobs direct/ indirect
- Rdam nr 1 reefer port worldwide (385,000 jobs, 15%=reefer)
- Import shift to Africa
- CO2 footprint (air-truck)
- Increasing competition Asia

NEW INFRA IN THE NETHERLANDS & PORT OF ROTTERDAM IN PLACE

Deepsea port capacity

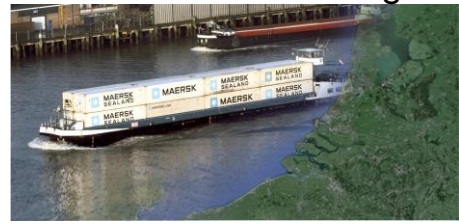


Direct distribution to European retail

AGRO Maasvlakte



Rotterdam Cool Barge



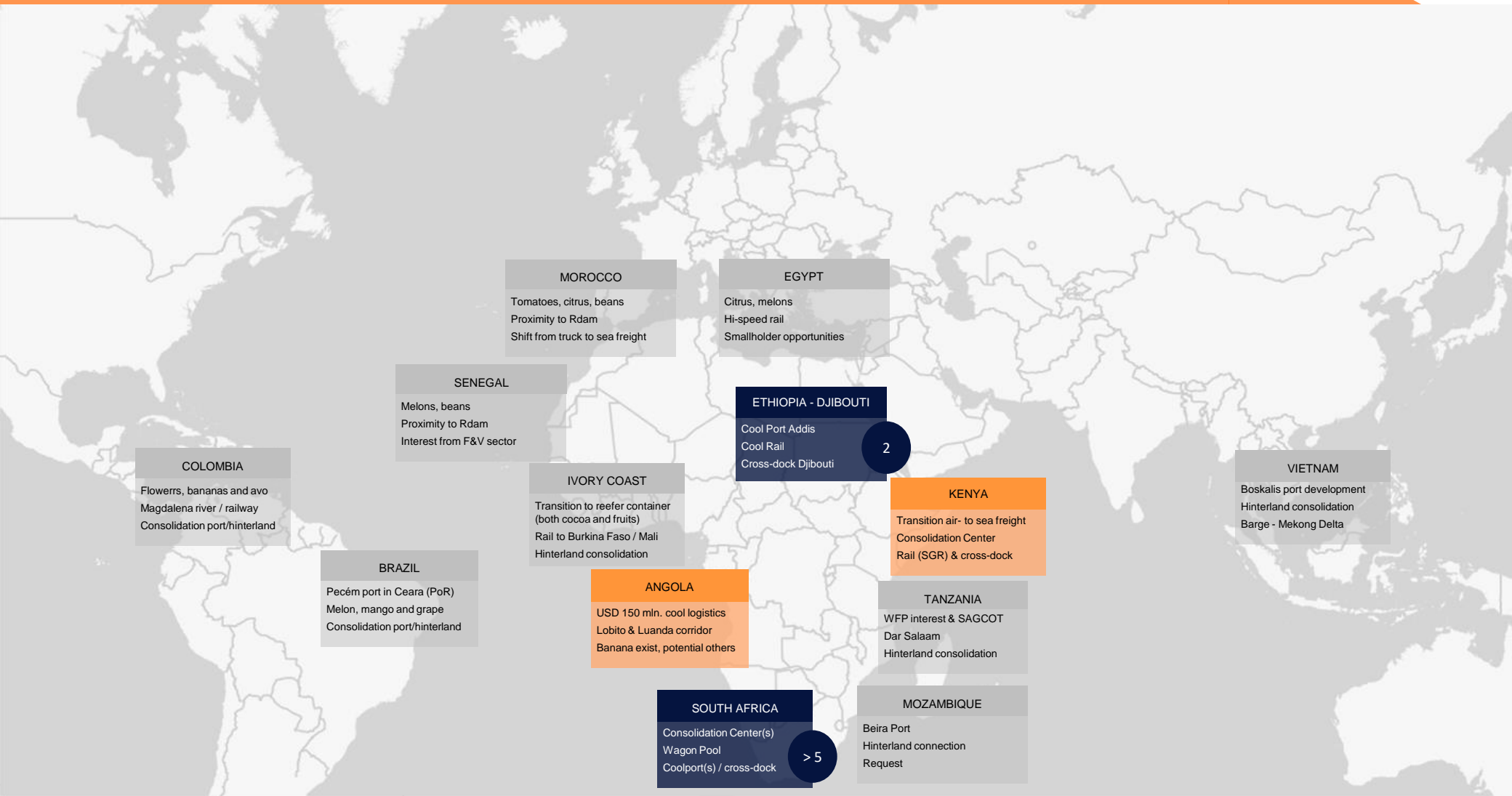
Rotterdam Cool Port



Cool Rail Spain



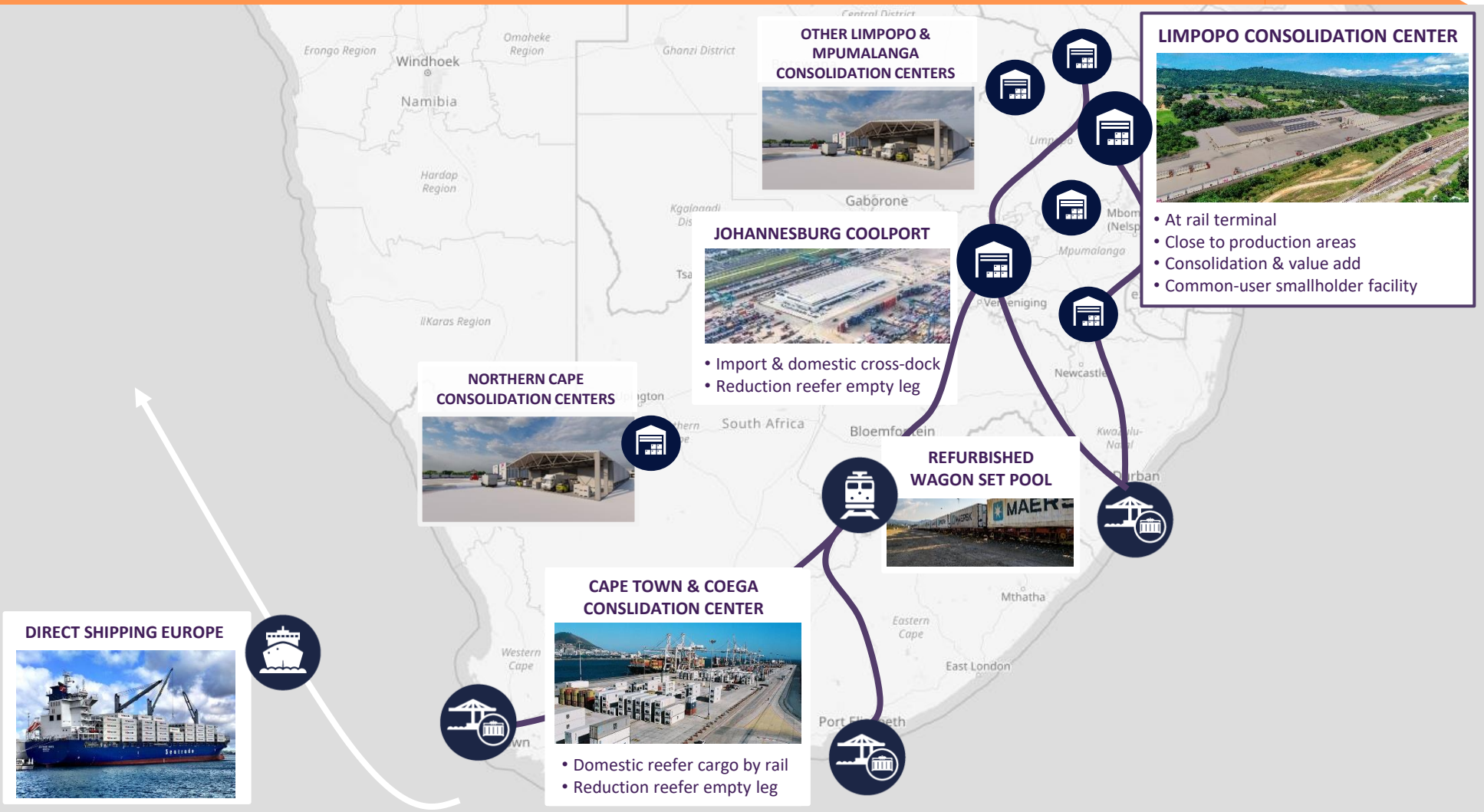
STRATEGIC AGENDA OF PROJECTS



2

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SOUTH AFRICA: CORRIDORS OF COOL LOGISTICS PROJECTS



LIMPOPO CONSOLIDATION CENTRE



IN ASSOCIATION WITH:



ETHIOPIA – CORRIDOR OF PROJECTS TO CATALYSE INDUSTRY

NEW HINTERLAND LOCATIONS AS RAIL NETWORK EXPANDS

CROSS DOCK DJIBOUTI

- In Djibouti container terminal
- Enable backloading of dry cargo
- PDA with container /DPFZA
- Supplying Djibouti market

COOL PORT ADDIS

- Integrated in biggest dry port
- Common-user smallholder facility
- Consolidation & value add
- Direct rail connection

COOL RAIL ETHIOPIA

- Modeled after South African industry
- 60-90% less CO2 emissions
- Most efficient way of transport
- Allows sea transition of flowers

COOL PORT ADDIS – DIFFERENT FUNCTIONALITIES SERVING DIFFERENT MARKETS



International inland container terminal

Fixed cool wagon project to supply Djibouti local market

Accessible to Isuzu trucks of smaller farmers

Fully integrated in rail terminal for max efficiency & product quality

Full reefer stack

Empty reefer stack

EGYPT HOLDS SIGNIFICANT HORTICULTURE POTENTIAL

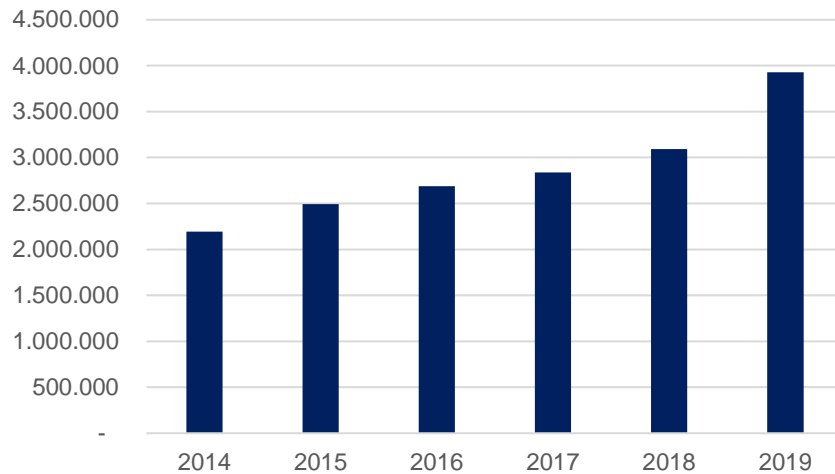
Horticulture production is growing fast...

- Production almost doubled between 2014 and 2019
- Strong growth in oranges and strawberries
- Exports dominated by large growers/exporters
- Further growth expected in coming years

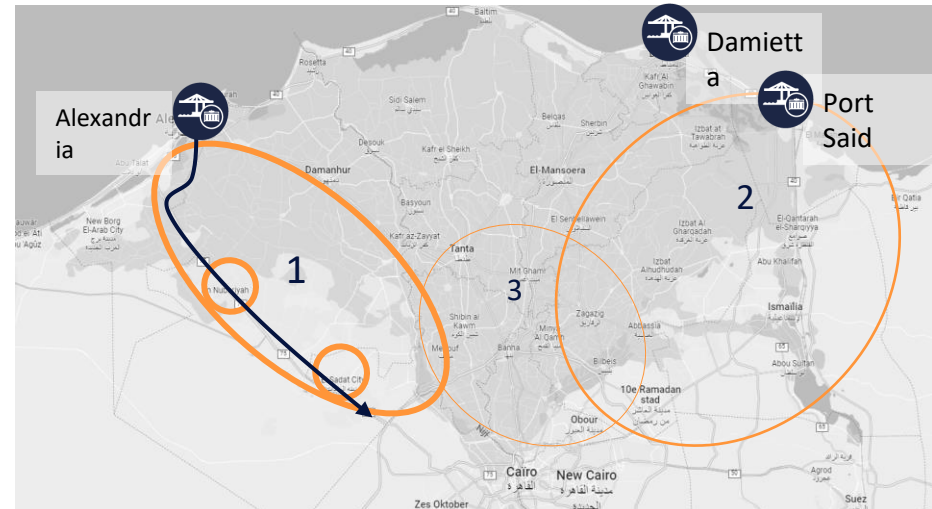
Sustainability is a challenge for the future

- Export market access limited to large exporters
 - Logistics bottleneck for small farmers
- Truck transport dominant to port
 - High CO2 emissions & product loss

Horticulture exports, tonnes



Main production regions

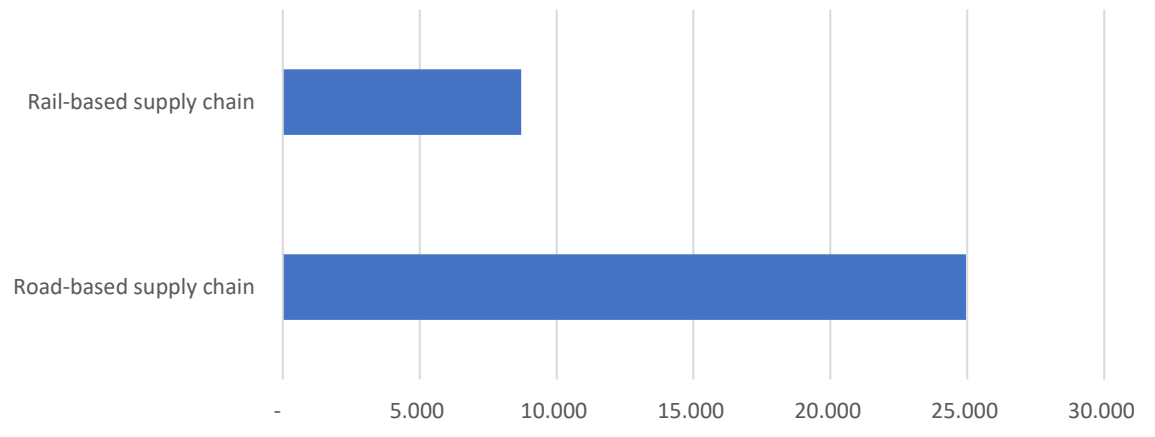


AGROLOGISTICS INFRASTRUCTURE CAN BE A SOLUTION

Agrologistics solves many of the challenges

- Hinterland consolidation allows more **sustainable railway transport**
- Early consolidation = accessibility, lower losses and higher quality.
- FS can employ connections in Dutch Mainport/Greenport sector.

Industry carbon emissions per modality (tonnes)



— first phase of construction (660km) — future construction

THANK YOU FOR YOUR ATTENTION

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