



DP WORLD
PORTS & TERMINALS

TODAY'S MODERN TERMINALS: CHALLENGES IN SHAPPING THE FUTURE

August 11, 2025



GLOBAL LOGISTICS PARTNER

ACROSS OUR GLOBAL NETWORK



560+
BUSINESS UNITS



75+
COUNTRIES



115,000+
EMPLOYEES



102M+ TEU
GLOBAL CAPACITY

HANDLING 9.2% OF WORLD
CONTAINER PORT
THROUGHPUT in 2023



\$41.6BN
CAPITAL EMPLOYED



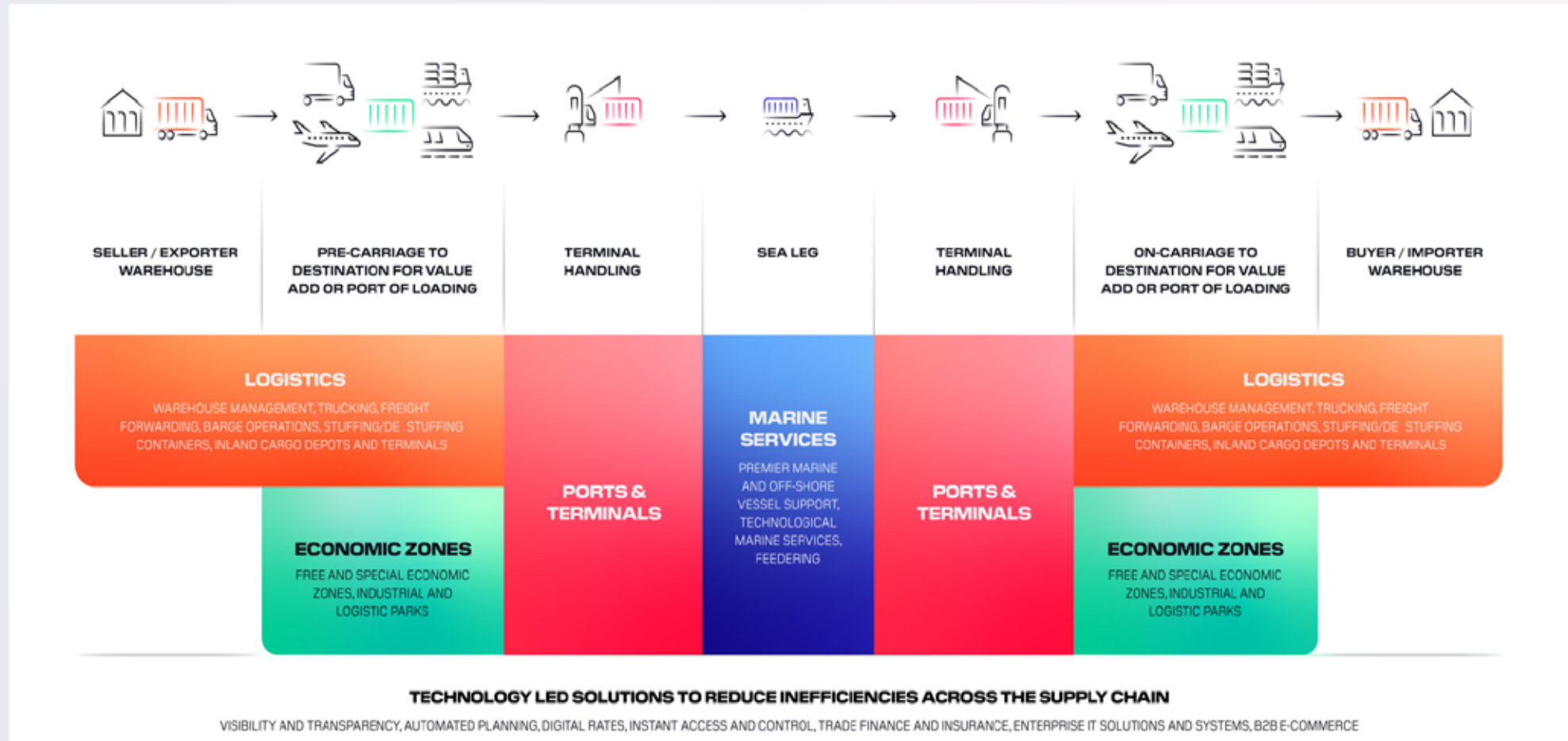
LOGISTICS

ECONOMIC ZONES

PORTS & TERMINALS

MARINE SERVICES

SUPPLY CHAIN SOLUTIONS PROVIDER – FULLY INTEGRATED ACROSS THE SUPPLY CHAIN



Playing a wider role in the supply chain



Connecting directly with cargo owners & aggregators of demand



Providing technology led solutions to remove inefficiencies



Improve quality of earnings and drive returns

DP WORLD – PORTS & TERMINALS

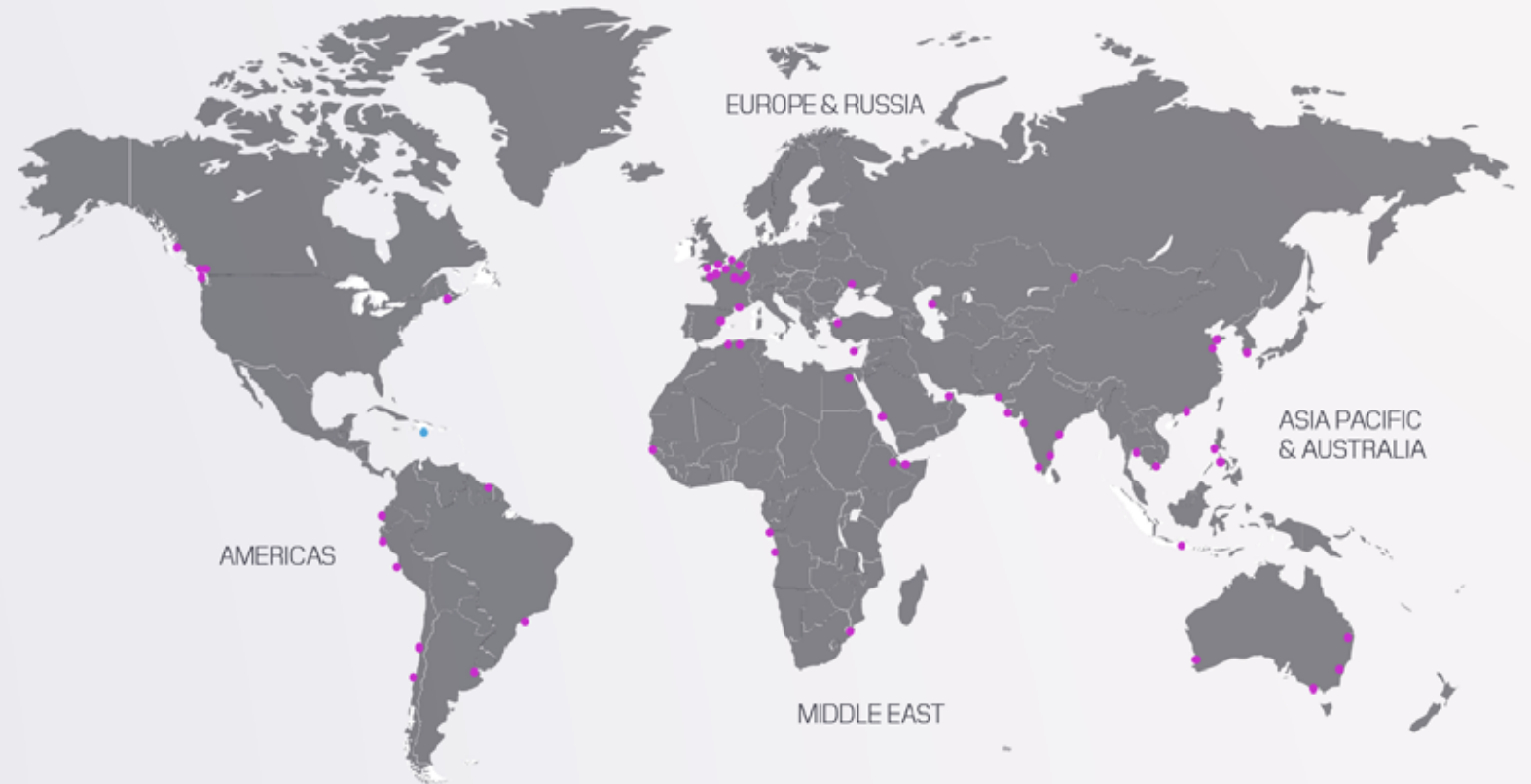
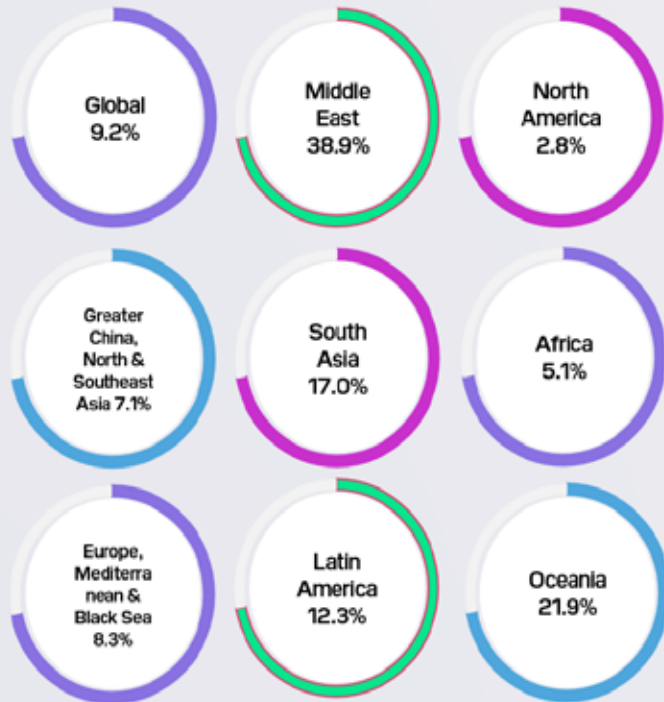
OUR GLOBAL FOOTPRINT

DP World is a global leader in container terminal operations and manages **102 million+ TEU** of capacity.

DP World's container capacity is focused on faster growing markets and high margin origin & destination cargo.

Average life of port concessions is approximately **32 years**

DP WORLD MARKET SHARE (BY THROUGHPUT)*





BEFORE THE RACE

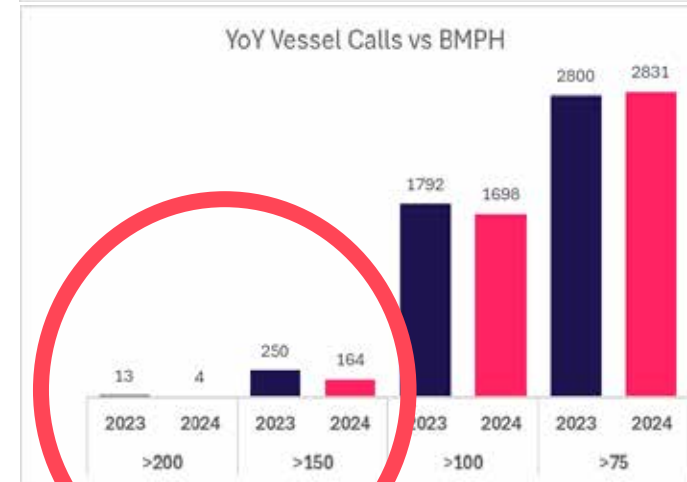
CUSTOMER REQUIREMENTS



Location	Service List	Proforma Moves	MCD	Frequency	BMPH
London Gateway	Asia-Europe service	5100	5	Weekly	138
London Gateway	Asia-Europe service	4800	5	Weekly	130
Jebel Ali	Europe-Middle East-India service	6100	5	Weekly	150
Jebel Ali	Europe-Middle East-India service	5600	5	Weekly	150
Jebel Ali	Oman-Doha-Jebel Ali service	3000	5	Weekly	150
Jebel Ali	UAE-India-Saudi Arabia service	4000	6	Weekly	180
Jebel Ali	UAE-India-Saudi Arabia service	4500	6	Weekly	180
Jeddah	Port Said-Jeddah service	3500	5	Weekly	146
Pusan	Asia-North America service	3500	4.6	Weekly	109
Pusan	Asia-North America service	2900	4.6	Weekly	100
Pusan	Asia-North America service	4400	5.0	Weekly	105
Pusan	Korea-Straits service	4200	5.0	Weekly	102
Pusan	N.China-Korea service	4500	5.0	Weekly	118

TERMINAL PERFORMANCE

- 7 vessels over 20k TEUs exchange in 2024
- 49% increase in vessels with capacity 10k-20k
- 17 vessels performed over 200 BMPH
- 314 vessels over 150 BMPH
- 30% of terminals have BMPH higher than 60
- 70% of the volume handled with BMPH over 60



THE GAP

WORLD

Terminal Name	Location	BMPH
Xiamen Songyu Container Terminal	Xiamen, China	130.8
Tianjin Five Continents International Terminal	Tianjin, China	123.3
Ningbo Beilun Second Container Terminal	Ningbo, China	122.5
APM Terminals Yokohama	Yokohama, Japan	110.0
Hyundai Pusan Newport Terminal	Busan, South Korea	107.3
Qingdao Qianwan Container Terminal	Qingdao, China	107.2
Nhava Sheva Gateway Terminal	Nhava Sheva, India	106.6
APM Terminals Mumbai	Mumbai, India	105.4
Tianjin Port Euroasia Terminal	Tianjin, China	105.3
OOCL Kaohsiung Terminal	Kaohsiung, Taiwan	100.9



IN THE PIT

WHAT MATTERS IN THE PIT

- Design
- Asset strategy
- Automation
- Digital capabilities
- People



TERMINAL DESIGN

Behind the Curve



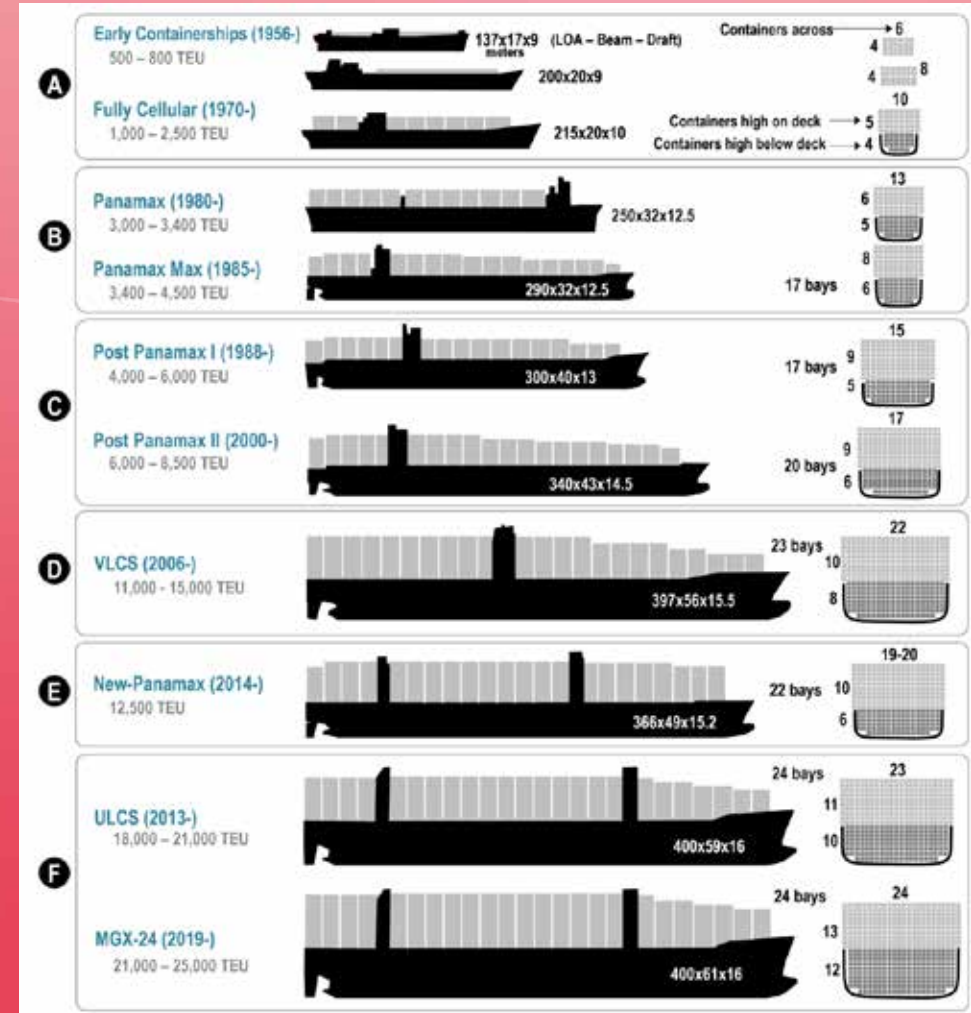
JA
2004



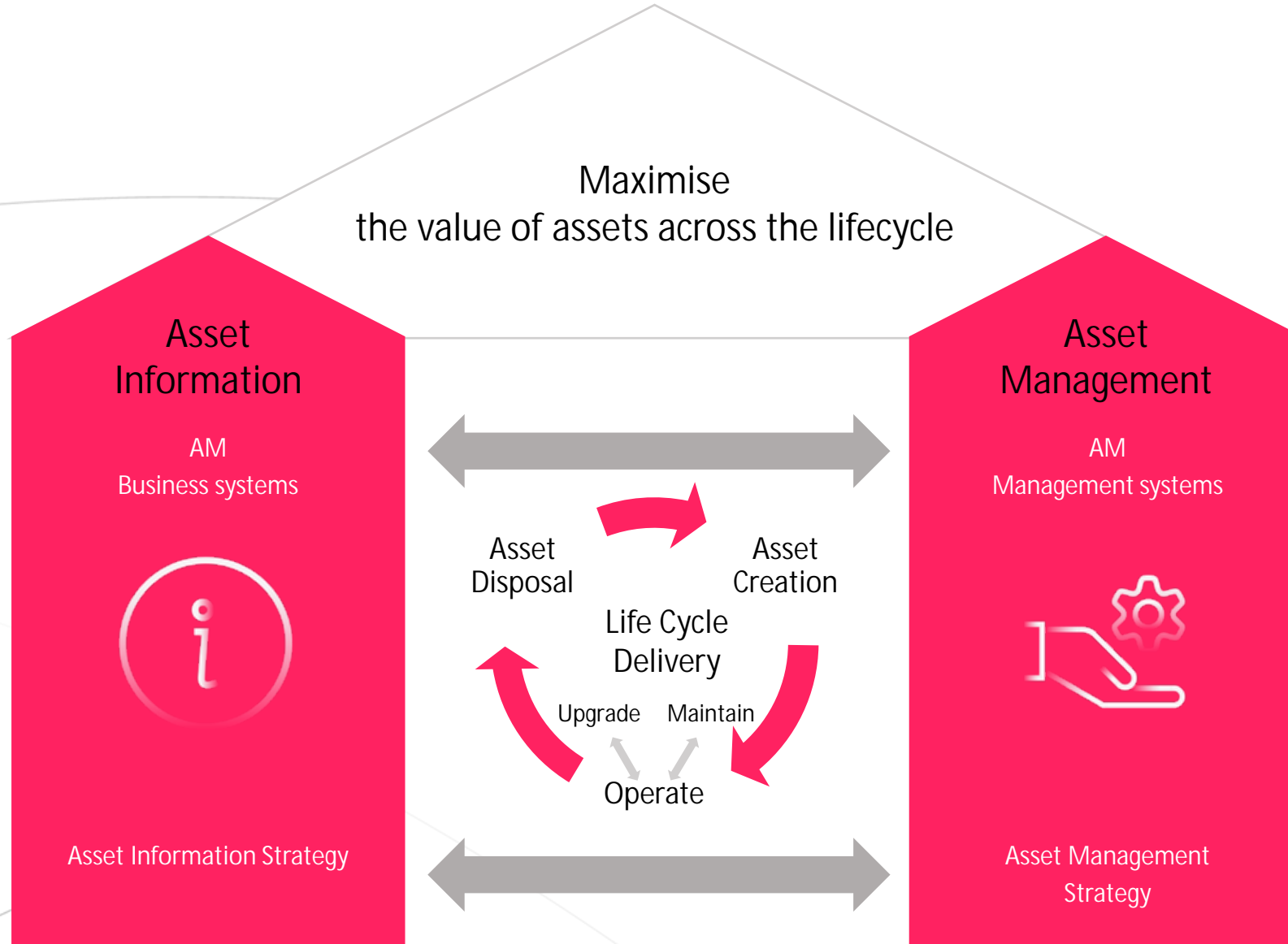
LG
2010



TUAS
2022



ASSET MANAGEMENT



ASSET STRATEGY

ENERGY USAGE EXERCISE

2024 CURRENT STATE

- 88M TEUs
- We consumed over 3 billion kWh
- 38 kWh/per TEU

WHAT IS POSSIBLE

- Converted everything to BoxBay
- Automated horizontal transport
- Apply all available technologies
- Outcome less than 10 kWh/TEUs



Machine Automation*

- Cargo Loading/Unloading
- Cargo stacking/retrieving
- Horizontal transport
- Vessel mooring
- Pinning

Process Automation

- Horizontal fleet routing
- Horizontal fleet loading/unloading priority
- Port call optimization
- Documentation for gate-in/gate-out
- Gate-in/Gate-out identification

Data Driven Intelligence*

- Yard stacking optimization
- Empty container storage yard stacking optimization
- Yard space optimization
- Dynamic berth management
- Scheduling (cranes, vehicles, manpower)

Digital Stakeholder Content

- Trucking companies
- Rail operators
- Barge operators
- Shipping lines
- Port authority
- Customs agents
- Customs authority



TOS

- Berth module
- Operational module
- Transport module
- Yard module
- Gate module
- Rail Module

KEY MACRO PROCESSES

Optimise Port Call & Vessel Operations

Coordinate berth planning, vessel scheduling & crane operations:

- Speeds up ships' turnaround
- Avoids idle quay time
- Prevents congestion
- Maximizes quay productivity & vessel throughput

Optimise Yard Operation

Use digital tools to plan, move & stack containers more efficiently:

- Reduces unnecessary re-handling
- Improves yard space utilization
- Speeds up container retrieval
- Enhances yard flow & productivity

Optimise Horizontal Transport

Automatically assign & route internal vehicles to move containers efficiently:

- Cuts fuel use & delays
- Avoids internal congestion
- Improves timings
- Boosts coordination between equipment & systems

Automate Key Equipment

Introduce automation to critical handling equipment:

- Enhances safety by reducing manual handling
- Increases equipment productivity & operational speed
- Supports data collection

Streamline Gate & Landside Flow

Streamline gate operations, truck appointments & cargo transfers:

- Reduces truck waiting times
- Speeds up entry and exit processes
- Minimizes congestion at gates
- Improves truck turnaround & terminal

Connect and Integrate Stakeholders

Exchange data in real-time with partners, customs & authorities:

- Speeds up clearance & approvals
- Improves coordination with external actors
- Reduces errors & paperwork
- Enhances visibility across the supply chain

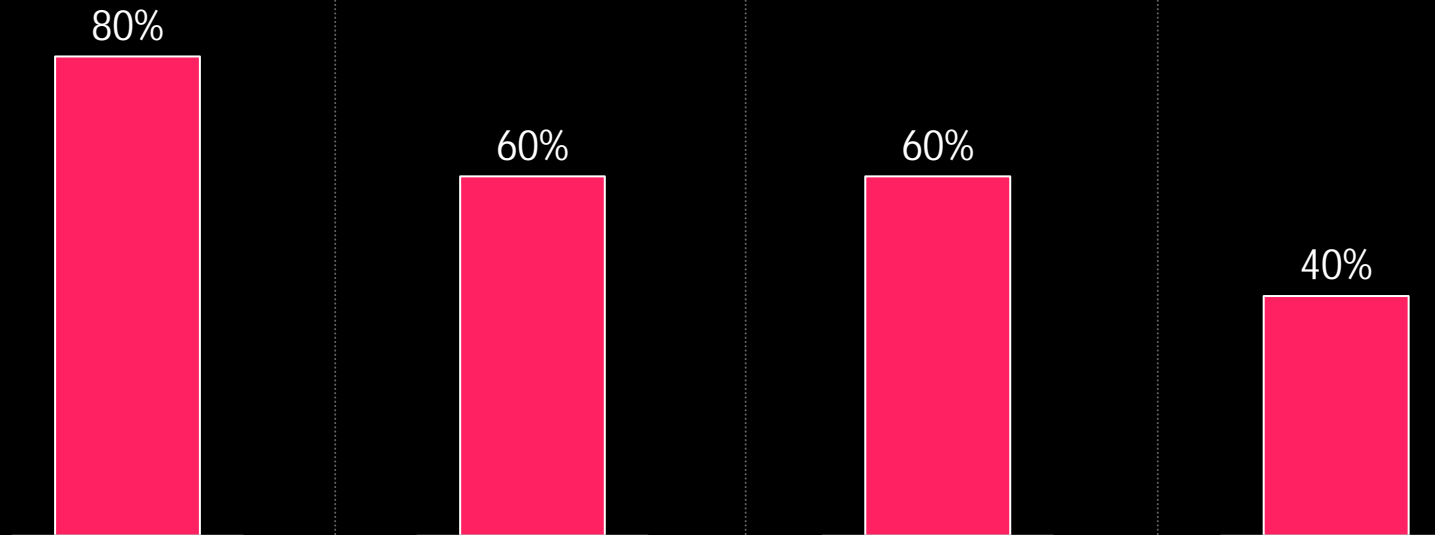


4 KEY SUCCESS FACTORS FOR DIGITAL TRANSFORMATION

PRIORITIZED BY TECHNOLOGY LEADERS WITH A JOINT PORTFOLIO OF 80+ TERMINALS



% of positive response



KEY LEARNINGS

Effective change management and the right skillsets are critical

Clear objectives and success metrics are needed to avoid academic exercises

Avoid sticking to legacy systems with a clear transformative mindset

Standardize best practices across terminals with flexible digital tools



THE RACE

INDUSTRY 4.0

FOURTH INDUSTRIAL REVOLUTION

FIRST

Introduction of mechanical production facilities with help of water and steam power.

SECOND

Introduction of a division of labour and mass production with the help of electrical energy.

THIRD

Use of electronic and IT systems that further automate production.

FOURTH

Use of cyber-physical systems.

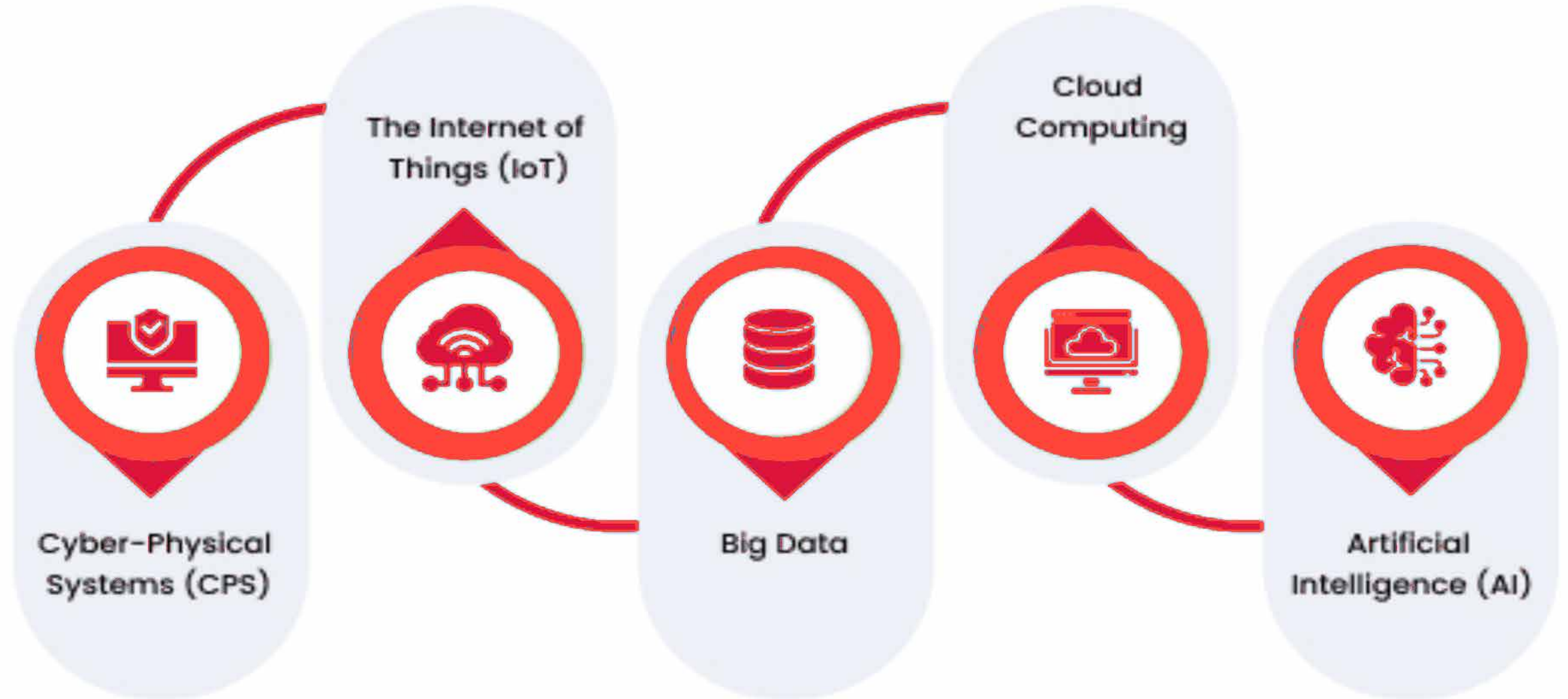
First mechanical loom, 1784

First assembly line, 1870

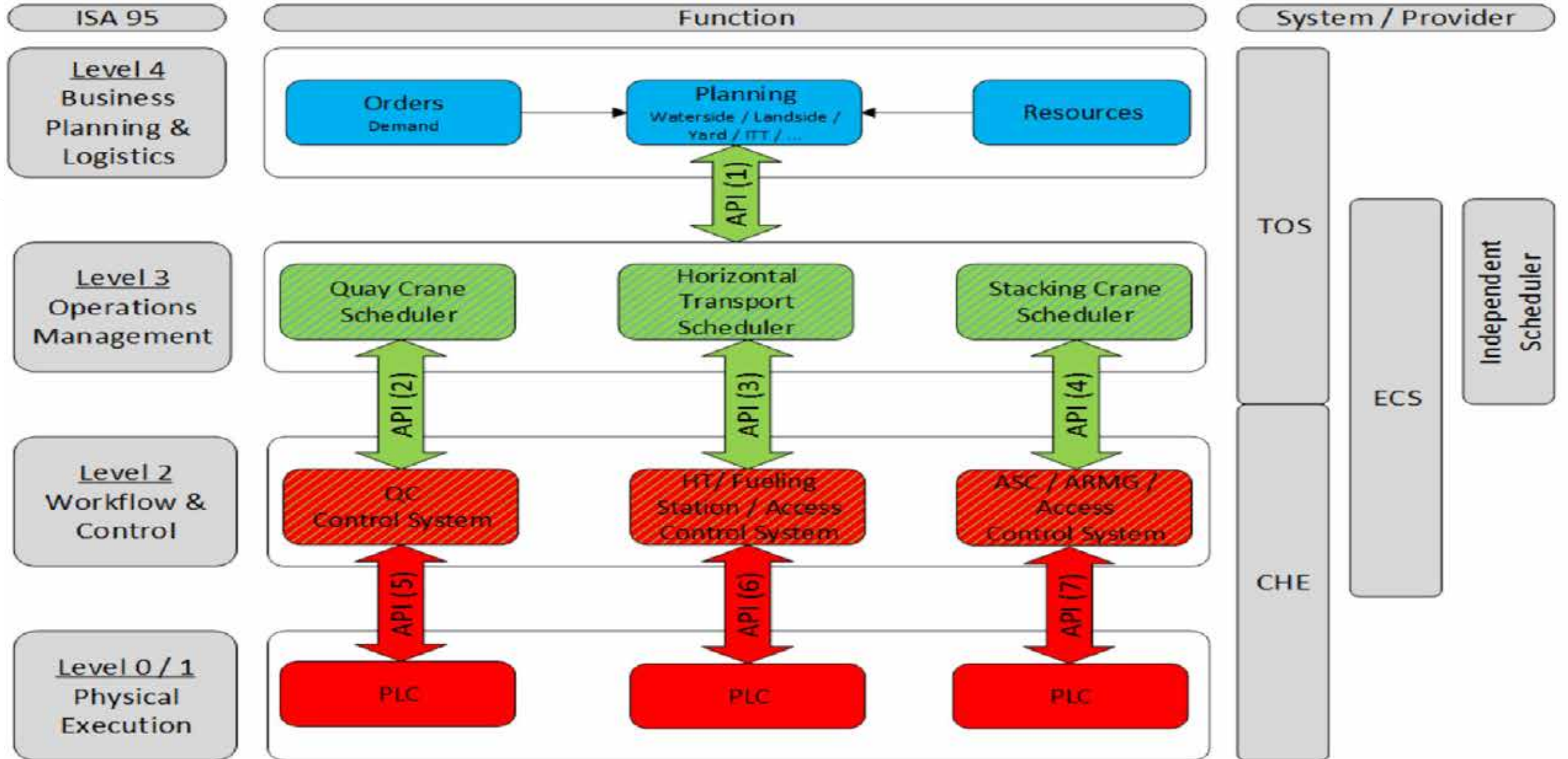
First PLC, 1969



Industry 4.0 Fundamental Components

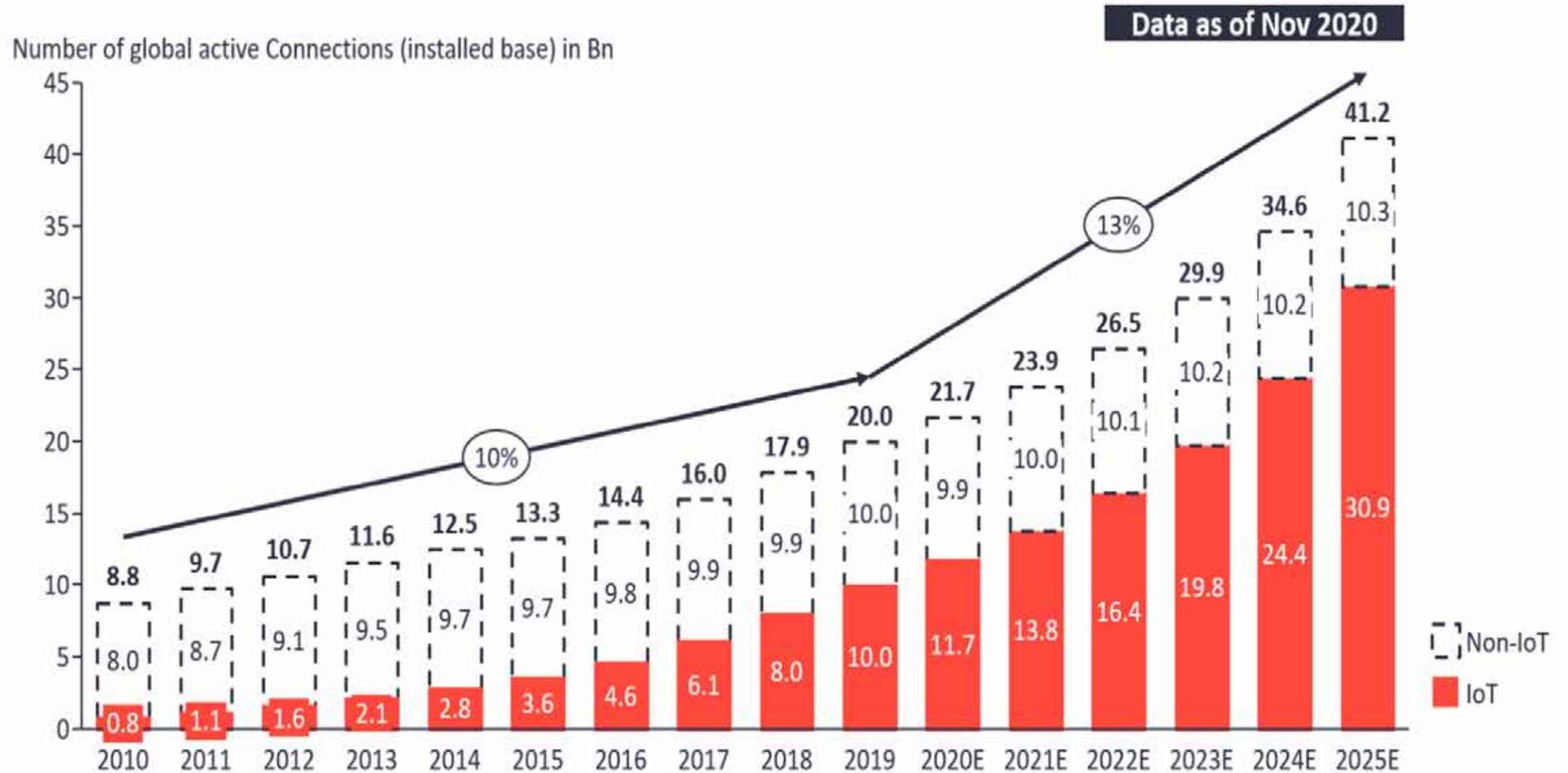


OUR CHALLENGE

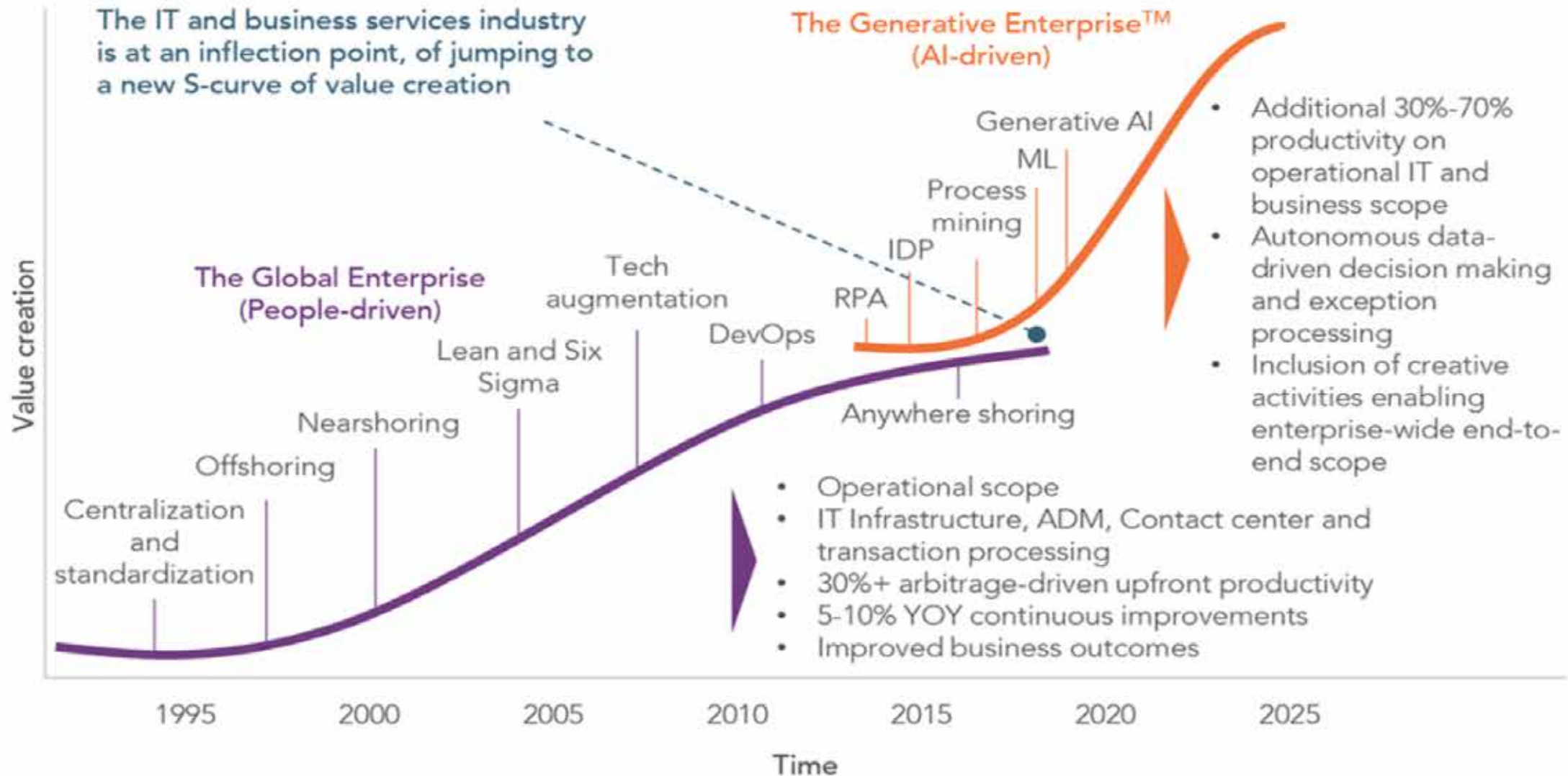


Total number of device connections (incl. Non-IoT)

20.0Bn in 2019– expected to grow 13% to 41.2Bn in 2025



VALUE CREATION



KEY TAKEAWAYS

- Terminal capabilities are lagging behind customer requirements
- Terminal's digital maturity profiles are behind industry leaders
- Maximize the value of your assets across the life cycle
- Standardization within the organization and across the industry is a must
- The future is in integration. Industry 4.0 will come to ports soon; get ready.
- Autonomous data-driven decision and exception handling will take over from the People Enterprise Model
- Customer demand will increase; they will still want more choices, lower prices, and better service
- Don't forget about your people
- Encourage creativity

[VIDEO](#)





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THANK YOU