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LIBYAN MARITIME & NAVAL SECTOR MARKET POTENTIAL



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Special document for



LIBYA MARITIME EXHIBITION

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GLOBAL VIEW

Libya is celebrating this year the 40th anniversary of the Al-Fatah Revolution in an exceptional context where the country is enjoying the benefits of a growing economy, refreshed strategic and economic ties.

For almost 5 continuous years, innovative projects have been booming in all sectors. By the beginning of 2009, Libyan authorities have decided to use the advantage of being situated in the heart of North Africa, on the southern shore of the Mediterranean, in the gateway to Africa to develop and modernize the maritime and naval sectors, and transforming the country into:

- the most secured, safe and modern maritime transportation corridor
- the major stopover destination on Mediterranean cruises
- the most attractive seaside and eco-tourism destination
- the cleanest coast and most protected maritime environment

All projects under development and under studies represent opportunities for direct trade, investment and collaboration.

The Potential Market of the Naval Sector

Following the decade of severe international embargo, the Libyan Navy has prepared a plan:

- to modernize several naval bases
- to enhance the logistics in existing naval bases
- to purchase modern communication and surveillance Equipments
- to purchase new patrol vessels for the coast guards
- to purchase new warships
- to maintain and repairs existing warships

As the Libyan navy is giving priority to survivability, there is also a reasonable plan to strengthen naval air defense through purchasing new surveillance system, aircrafts and helicopters, special missiles and anti-ships, for warships self-defense and protection of nearby vessels.

Continuous investment of more than 30 billions euros will be needed in the 10 coming years to achieve the goals defined by the defense authorities for the Libya n navy, focusing Libya as one of the future most attracting market.



Ports Development Projects

Libya has allocated upon billions of untapped reserves of wealth over the past decades, and plan now to spend part of it on building and upgrading ports infrastructure.

The port of Benghazi, the port of Al-Khums and the port of Tubruk are under complete re construction.

Reconstruction is also planned in several other commercial ports in the frame of BOT. Expected BOT include the port of Tripoli, the port of Sirte, the port of Zwara and the port of Derna.

The global investment in the next 10 years allocated for ports' development will approximate 20 billions euros.

Improvement of Ports & Navigation Facilities

Technical studies have been completed for:

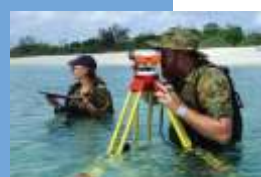
- the project for upgrading major oil and gas terminal infrastructures
- the global project for building gantry cranes in the containers' terminal at Tripoli port, Benghazi port and Al-Khums port.
- the project to enhance the available light houses and upgrade navigational aids
- the project for dredging almost all Libyan ports
- the project for logistics buildings in Al-Khums port as part of Libya for the International Trade Network.

Continuous investment of more than 2 billions euros will be needed in the 10 coming years to improve ports and navigation facilities in Libya

Projects in the Hydrographic sector

The Libyan Maritime and Ports Transportation Authority is finalizing technical studies for:

- the project to establish the Libyan Hydrographic office, with the technical assistance of an international expertise
 - the project for surveying the Libyan coast
 - the project for strengthening the navigational channels to all Libyan ports
 - the project for establishing the navigational chart
 - the project to upgrade security in major Libyan ports in order to comply with international Ships and Ports Security Code.
- Continuous investment of more than 2.5 billions euros will be needed in the 10 coming years to realize the above mentioned projects



Offshore Oil and Gas projects

The production of Oil and Gas continues driving forward Libya's economy. The country's total proven oil reserves amount to approximately 44 billion barrels of crude oil. Only 12 oil fields are explored and around 25% of the country is covered by exploration agreements with oil companies. Offshore exploration is considered as the future of oil production in Libya, with an exceptional good quality of oil.

According to experts, Libya oil industry will be facing in the nearest future the challenge, with more and more foreign companies investing in offshore exploration and production.

For the time being, several projects exist in the sector, including the purchasing helicopters for transportation, adapted sea-platform safety and security equipment...Also, existing offshore platforms need maintenance and enhancement.

As Libya has planned to increase oil production, Investment in the sector is expected to approximate 30 billions in the next 10 years.

New vessels

Libya continues depending on goods, foods and equipment importation from Europe, Asia and America. The maritime sector in Libya should be accordingly very dynamic. A large number of maritime companies and agents has been created in the last five years.

Major Libyan shipping companies continue transporting the large part of Libya supply needs through their worldwide partners. Most of them are planning to purchase in the coming years, additional vessels to cover the expansion of the shipping market.

Not less than 30 cargo ships will be purchased by Libyan companies in the following 10 years. In the same period, more than 10 oil tankers and ships for liquefied gas will be purchased. Almost 5 cruise ships will be ordered by private Libyan promoters in partnership with foreign investors, to boost the tourism industry.

Continuous investment of more than 10 billions euros will be needed in the 10 coming years for the acquisition of new vessels.



Marina projects

In 2006, Libya has received 41,000 tourists by sea. The records for 2007 and 2008 are supposed to be better, justifying governmental plan to boost the development of the tourism sector.

The global ecotourism project, which is designed to draw affluent visitors, has created an atmosphere for profitable investment. Projects are concentrated on the 1990-km Mediterranean coastline, which is home not only to unspoiled beaches, but also to several exceptional Greek and Roman archeological sites.

More than 50 big marinas and beach resort hotels are now in the pipeline or are planned to soon be under construction. More than 10 seafront hotels projects are under development, such as Sheraton, Burj Al baher, Hydra hotel project.

The most luxurious marina planned are:

- Misurata Marina project
- Greencity project
- Al-Hura city project in Benghazi
- Energy city project

The marinas planned will offer all entertainment facilities will be using not less than 10000 leisure boats.

Not less than 50 billions Euro will be needed in the 10 coming years for marinas' construction. .

Telecommunication and Navigation Technologies

In order to upgrade the existing maritime infrastructure, specific projects have been planned for telecommunication and navigation:

- the project for the implementation of the VTS (Vessel Traffic System) in Tripoli port, Zwara port, Benghazi port, Derna port, Al-Khums port and Tubruk port.

- the project for supplying major Libyan ports with GMDSS (Global Maritime Distress safety System)

- the project for building communication towers in Tripoli port, Benghazi port and Al-Khums port, according to international standard and in compliance with Solar Convention.

Other projects will be studied in the same field. In total, more than 1 billion euros will be needed for the enhancement of the telecommunication and navigation technologies





Training Projects

The Libyan Ports and Maritime transport Authority has determined a plan to train the maritime staff in the following sectors:

- post state control
- flag state
- ships and ports security
- legal affairs and international treaties and conventions
- networking
- information technologies
- incidents' investigations
- pollution prevention and remedy



Almost 50 millions euros will be invested in this training project.

FISHING SECTOR

With a coastal line of 1990 km of clean pollution-free sea water, Libya has carried out experience and marine researches that have testified that local marine environment is naturally suitable for aquaculture investment projects.



The Libyan unexploited sea sponge and coral reserves represent an important sector for investment. New fishing boats and technologies are needed and modern storage facilities should be developed.



Investment in the sector may reach 500 millions euros for the next 10 years.

Fighting against Pollution

As a big oil producer, Libya has a gas pipeline network measuring 1960 km, with a capacity to carry approximately 13.8 billion cubic meters per year. This is in addition to the existing Greestream, which is an underwater pipeline going from Libya to Italy with a capacity of 8 billion cubic meters per year. Due to the project to increase export, from 8 to 16 billion cubic meters per year, the Greenstream pipeline is under expansion, till 2013.



Gas export and the work to expand the existing pipeline as well as activities in oil terminals are classified high risky by Libyan officials. Yearly, more than 300 million euro is invested in order to fight against sea and coastal pollution, or remedy in emergency in the case of admitted pollution.



LIBYAN MARITIME & NAVAL SECTOR MARKET GLOBAL FIGURES

