

*PROMOTING SME DEVELOPMENT IN
THE SUEZ CANAL ECONOMIC ZONE
Connecting SMEs to global markets
through free economic zones*

A new Maritime scenario for Free Zones and SMEs

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Agenda

The Mediterranean in the global scenario

**Investment and competitiveness
in the Mediterranean**

The strategic role of Free Zones

Despite the general instability, the Mediterranean is strategic in the global economy

A light blue map of the Mediterranean region, showing the sea and surrounding landmasses. The sea is highlighted in a darker blue. The map includes parts of Europe, Africa, and the Middle East.

12-20%
Global shipping
traffic

27 ports
throughput
>700,000 TEUs

647 million tonnes
SSS

>500 million tonnes
Suez cargo traffic

+186%
growth of container
traffic since 2005

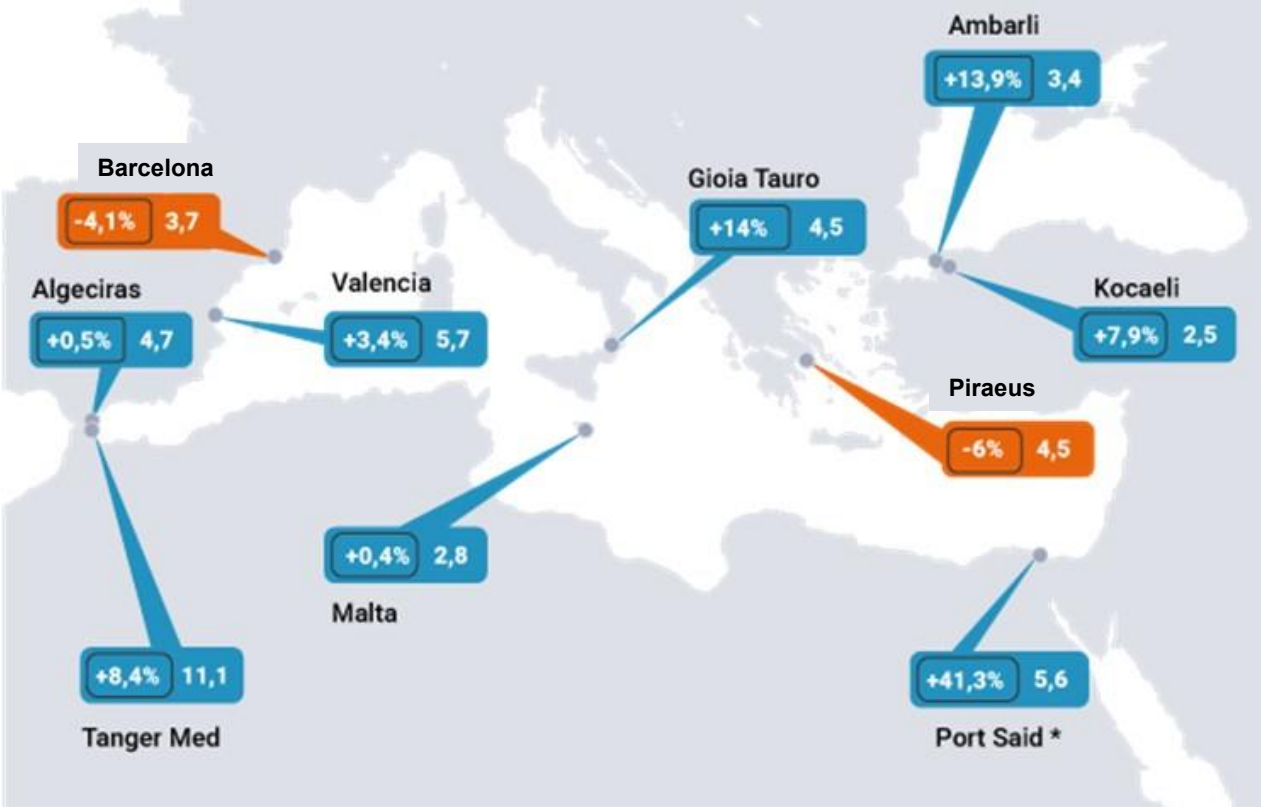
4 pipeline
(+1 under construction)
60 billion cubic meters
per year

The Mediterranean still holds a Central Position

2025 an exceptionally strong year for Mediterranean ports

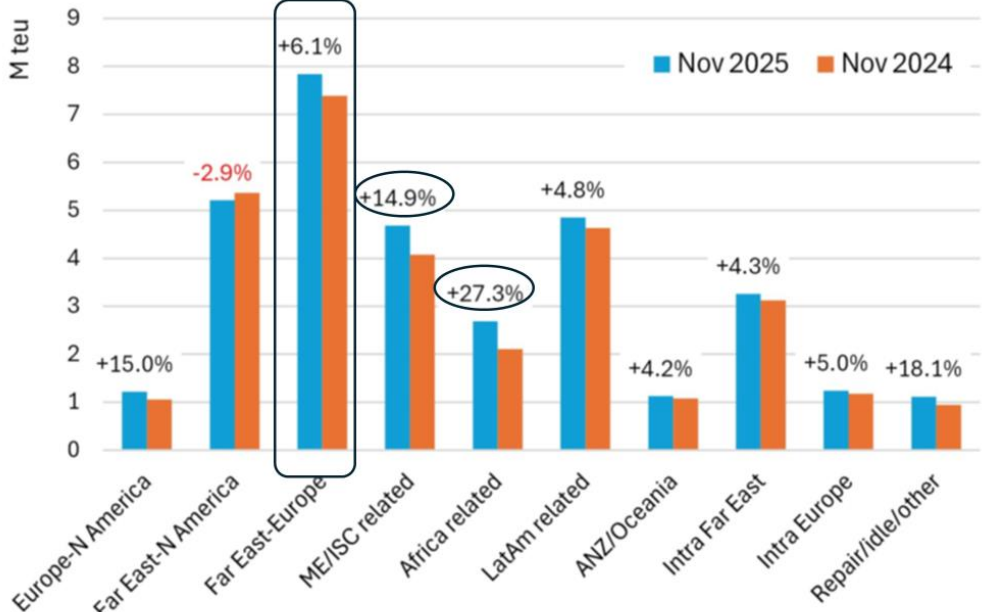
72 million TEUs +5.9% 2025 on 2024

Top 10 Container ports in the Mediterranean - 2025 Var % 24-25 ■ ■ M TEU



Increasing ships on the Far East-Med, West-Africa and Middle East-India routes

Global container fleet by area



Source: SRM on Port Authorities * Port Said COSCO Terminal.

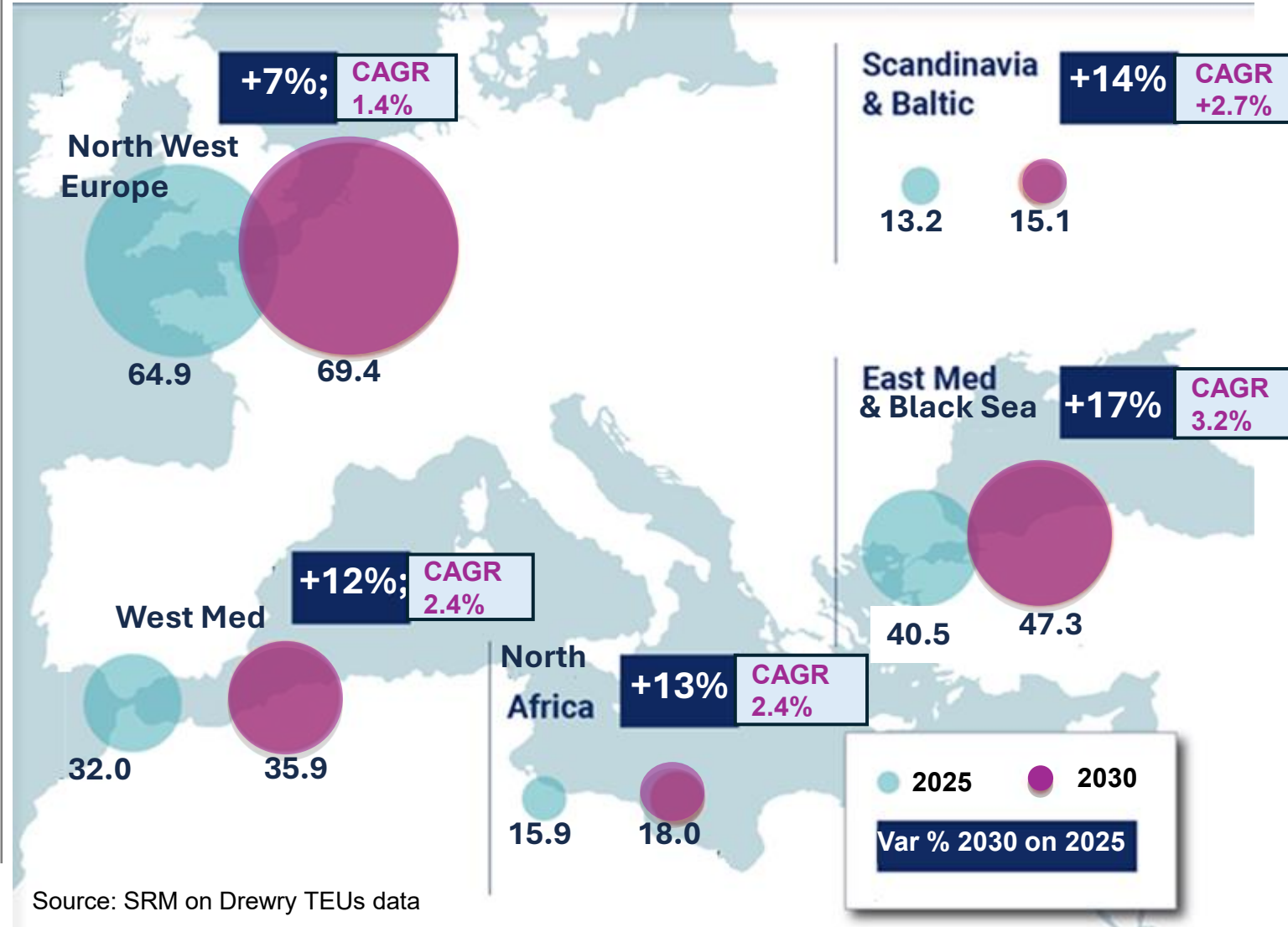
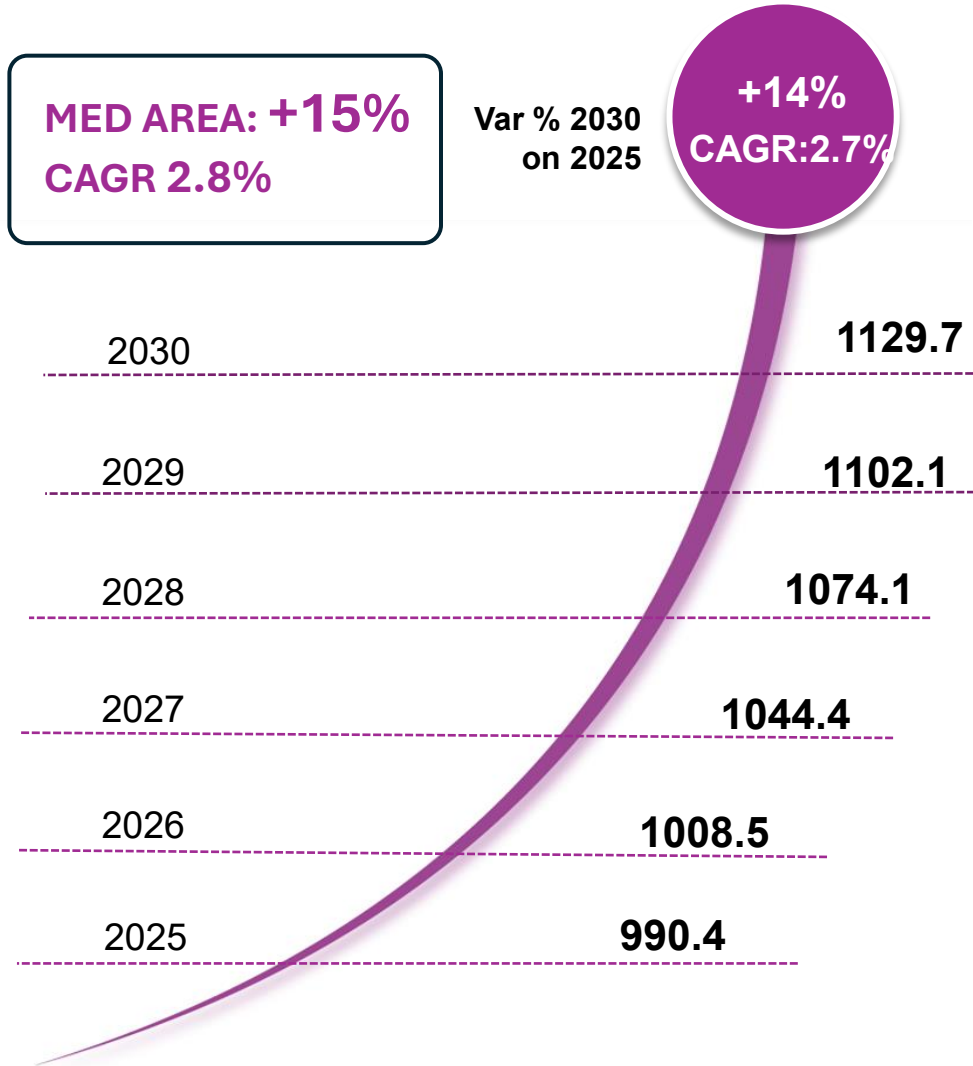
Global container fleet: +7.3%
33.2 Million TEUs of capacity

Source: Alphaliner
ISC: India Sub Continent
ANZ: Australia New Zealand



The Mediterranean will Grow further to 2030

World Container throughput (mln TEUs)



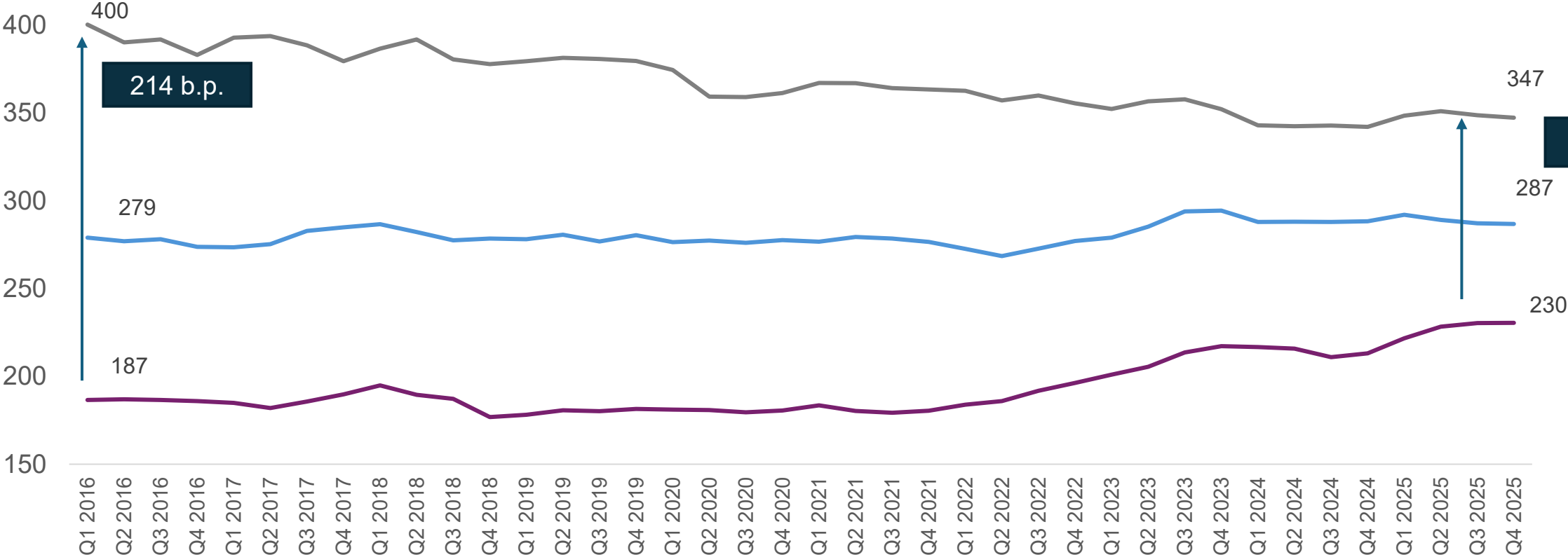
Source: SRM on Drewry TEUs data

Competition is increasingly defined by connectivity

Mediterranean ports are rapidly improving...

but they remain behind Northern Europe in total volume and efficiency

Liner Shipping Connectivity index (LSCI) Northern Europe, North Mediterranean, South Mediterranean 2016-2025



— Top Northern Europe (Belgium, Netherlands, Germany) — Top North Med (Italy, Spain, France, Greece) — Top South Med (Turkiye, Morocco, Algeria, Egypt)

Source: SRM onUNCTAD





LINER SHIPPING CONNECTIVITY INDEX (LSCI)

NORTH AFRICA COMPARISON: Q1 2017 vs Q1 2026



KEY MESSAGE

While most North African countries improved their connectivity index, ranking dynamics reveal diverging competitive performances across the region.

COUNTRY	INDEX Q1 2017 → INDEX Q1 2026	RANK Q1 2017 → RANK Q1 2026	INSIGHT
 EGYPT	228.82 2017 → 286.27 2026 ↑	19 2017 → 19 2026 —	Strong growth in connectivity, but no improvement in global positioning.
 MOROCCO	210.05 2017 → 263.16 2026 ↑	23 2017 → 23 2026 —	Significant index increase, yet stable ranking indicates intensified competition.
 ALGERIA	73.04 2017 → 73.24 2026 ↑	66 2017 → 72 2026 ↓	Marginal index growth accompanied by a deterioration in ranking.
 LIBYA	47.67 2017 → 66.13 2026 ↑	88 2017 → 77 2026 ↑	Clear improvement in both connectivity and global positioning.
 TUNISIA	41.3 2017 → 25.42 2026 ↓	97 2017 → 126 2026 ↓	Decline in both index and ranking, indicating reduced competitiveness.

Source: SRM on UNCTAD

Egypt ranked 1st in the area and 19th globally followed by Morocco (23rd globally).

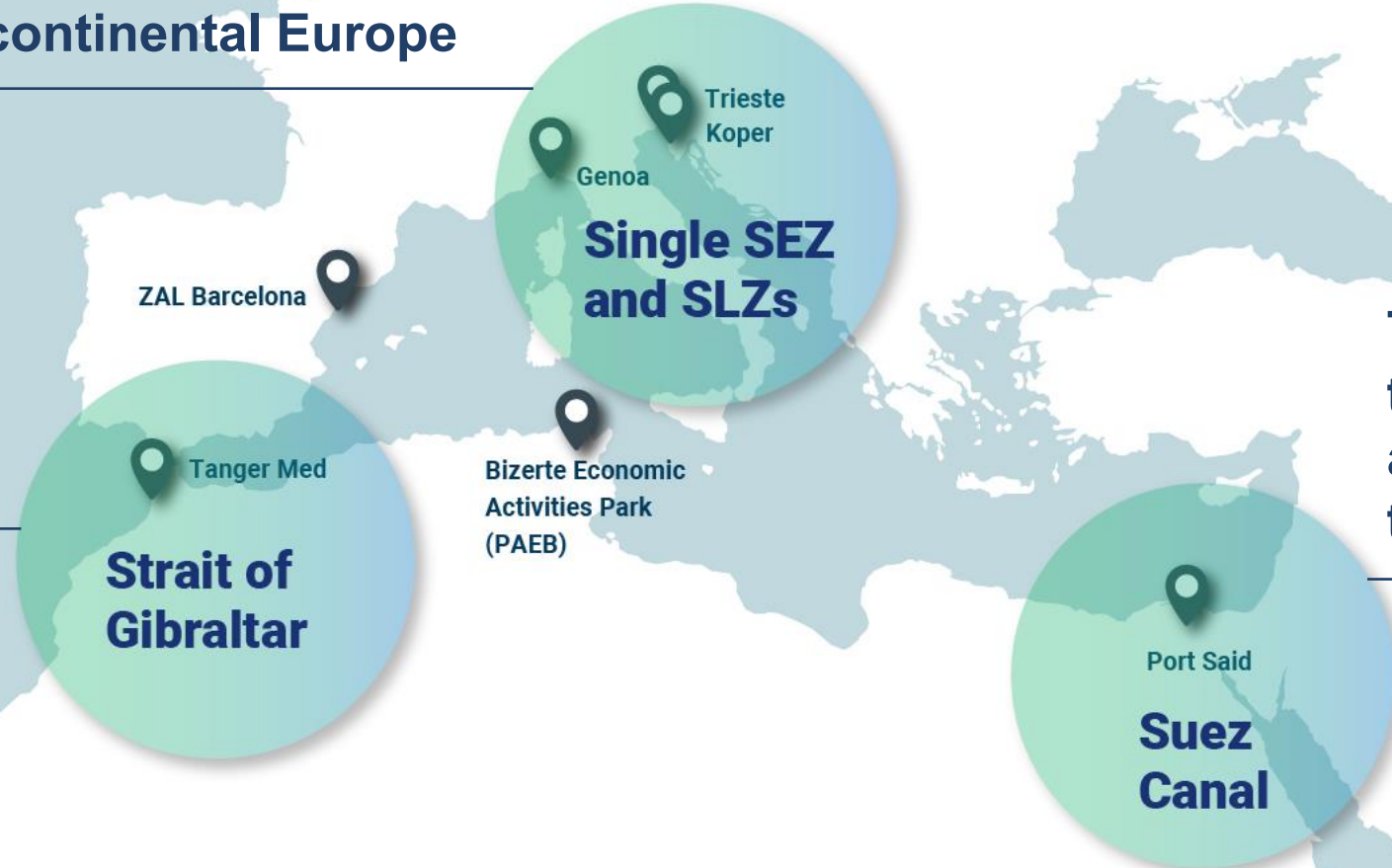
The region exhibits uneven performance: although connectivity improved in most countries, only Libya translated this into a better global ranking, while others faced stronger international competition..

The three strategic economic «poles» in the Mediterranean

The North Adriatic region: a gateway to continental Europe

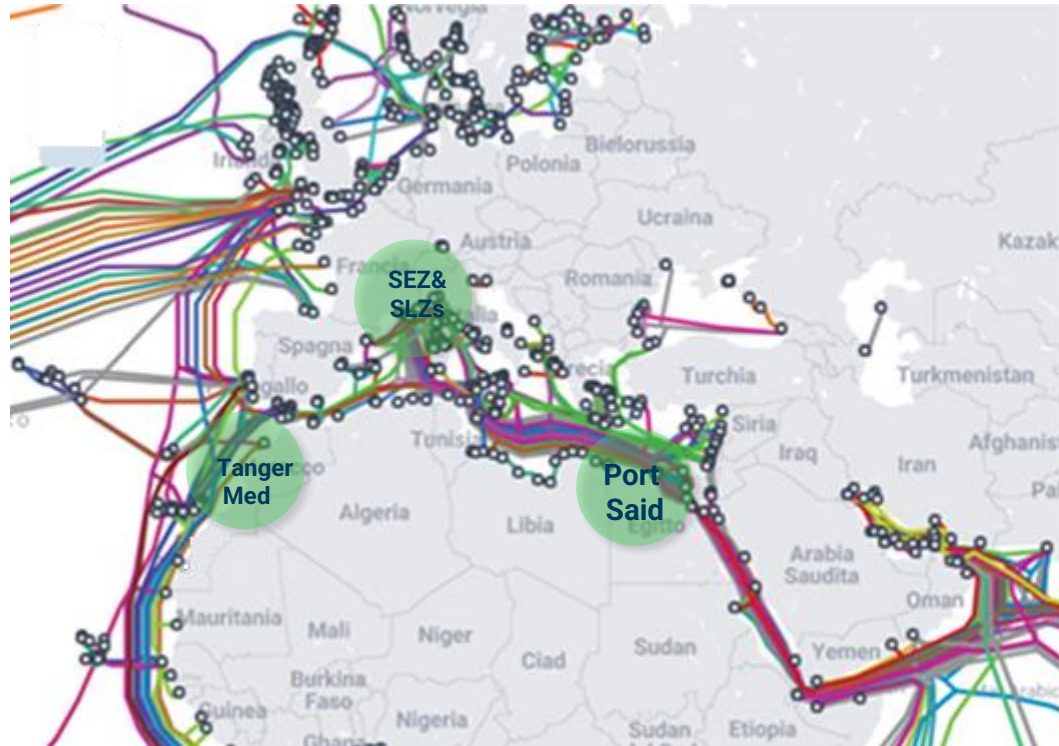
Morocco and the Strait of Gibraltar: the crossroad between Atlantic and Mediterranean

The East and the Black Sea: a strategic area for the Mediterranean

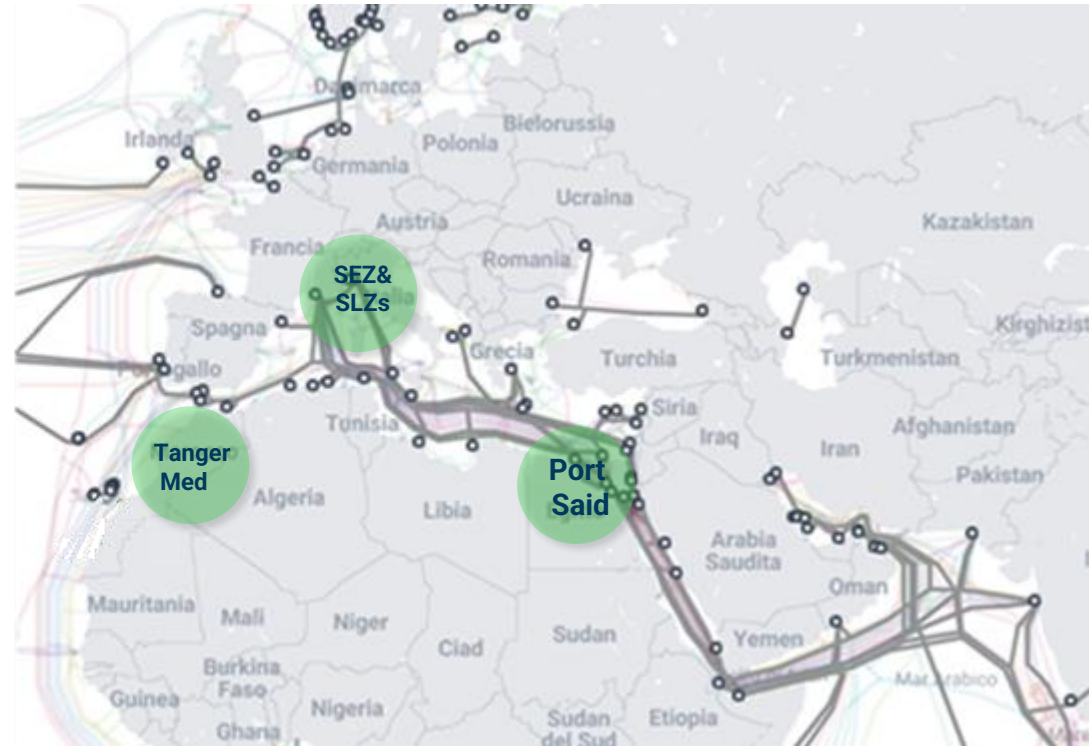


The Mediterranean Represents the Structural Backbone of Europe's Underwater Connectivity

System in operation



System planned



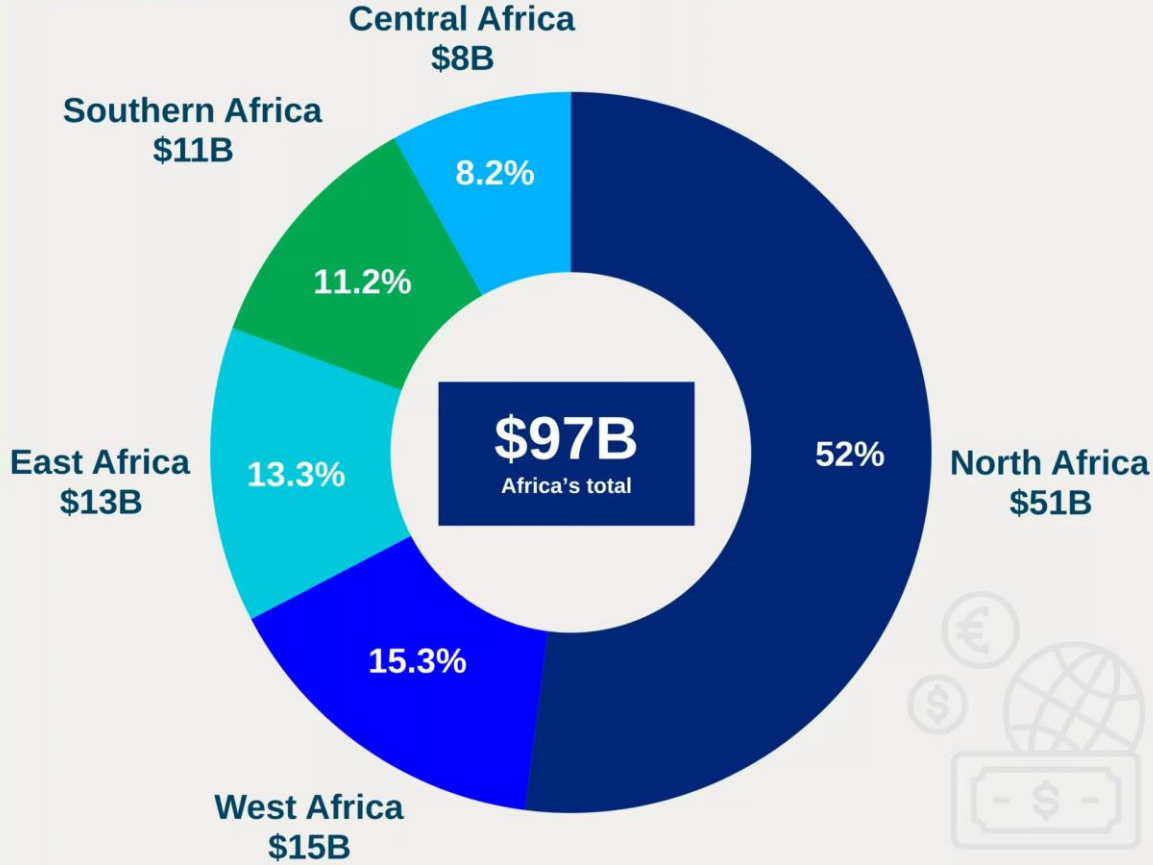
Source: TeleGeography – January 2026

Around **41%** of all European submarine cables lie under the Med (especially near North Africa and Sicily), confirming its central role in the continent's digital infrastructure.

North Africa a Key Driver in Africa's total FDI

FDI in Africa

North Africa was the primary destination for FDI in 2024, attracting 52% of Africa's total FDI inflow



Foreign Direct Investment (FDI) into Africa by region (2024)

NOTE: Figures may not add up to total due to rounding

Source: Rand Merchant Bank (RMB)

North Africa was a key driver in Africa's total FDI reaching a record high of \$97 billion in 2024 even it is projected to decline to approximately \$17 billion in 2025.

Growth is heavily concentrated in **renewable energy, tourism, and real estate**, alongside strong **manufacturing** interest from European investors for nearshoring.

Egypt: saw FDI rise to roughly \$45.6 billion in 2024, largely from UAE investments.

Morocco: a leader in attracting greenfield projects, particularly in **automotive and renewable energy**.

Tanger Med: a Positive Example of Economic Development and Geopolitical Influence

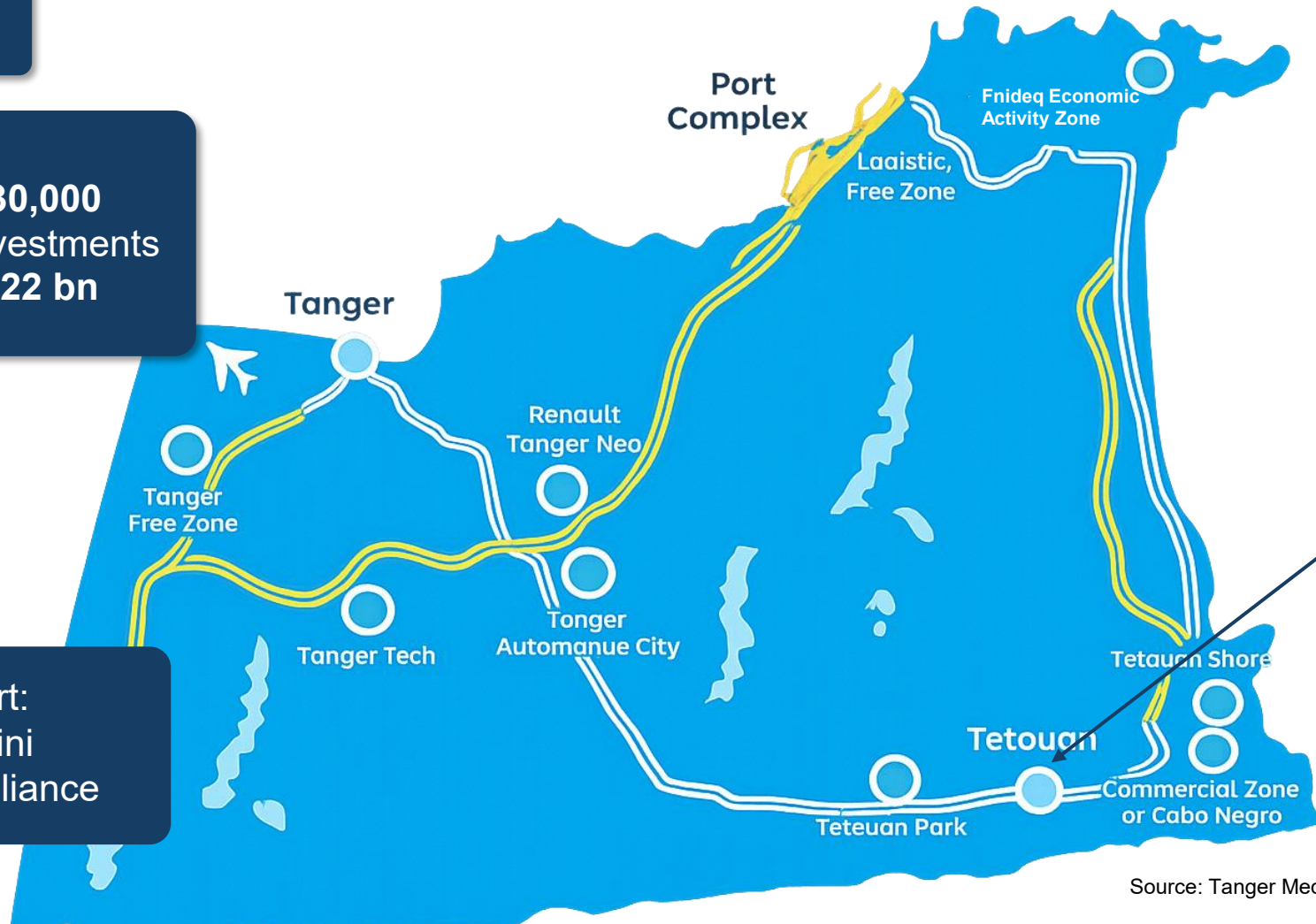
Free Zone Tanger Med


9 activity zones

Entreprises : **1,400**
Job created to date **130,000**
about **\$1 bn** private investments
Business volume: **\$17,22 bn**

180 ports connected
70 countries
5 continents

Alliances Calling at Port:
Premier Alliance, Gemini
Cooperation, Ocean Alliance



18% 
of Renault Group
vehicle production
takes place in
Tanger Med.

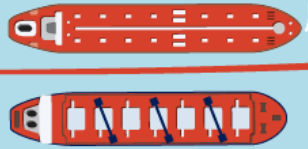
Tetouan Park:
a site to support
SMEs the Park is
home to **126** projects
with a private
investment of more
than **€80 million**,
creating 4,000 jobs
over time.

Suez is growing again and it is a strategic passage also for raw materials

Southbound

62%

Share of Tankers&Bulkers



Northbound

61%

Share of Tankers&Bulkers



Suez Canal

12,302 Ships

Total transits in 2025

7,555 Ships

Tankers&Bulkers in 2025

Jan-Apr 2026
on Jan Apr 2025

Total transits **+12%**

Total Tankers&Bulkers **+20%**

Total Tankers **+32%**

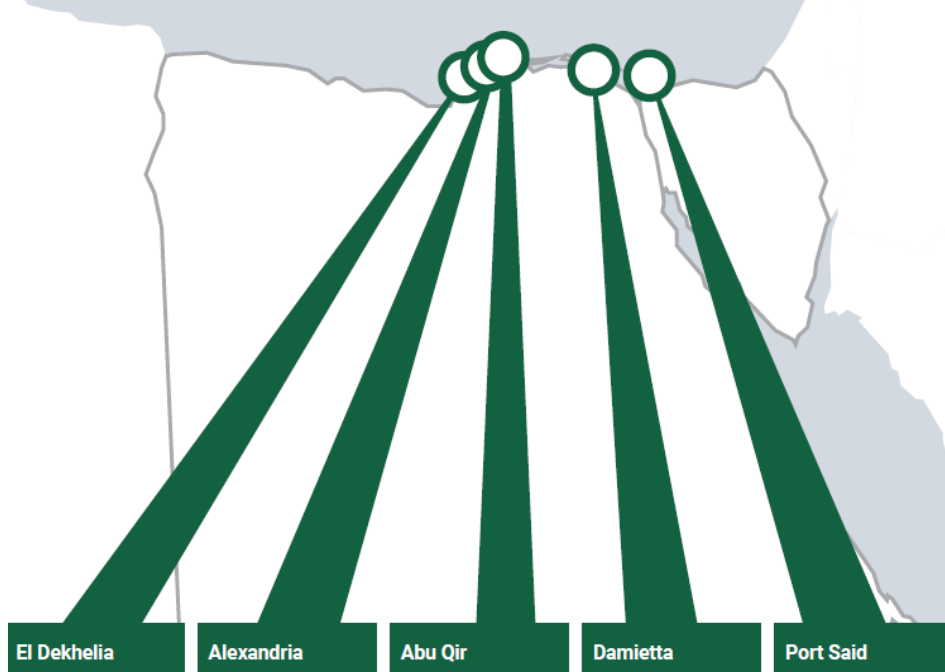
Source: SRM on Clarksons

Egypt Ports and SCZone Investments

Infrastructure expansion and industrial growth

PORT INFRASTRUCTURE EXPANSION

- **\$4Bn** national plan
- Terminal upgrades
- Rail connectivity to industrial hubs



→ **Egypt is emerging as a logistics and industrial hub driven by foreign investments**

SCZONE INVESTMENTS (2024–2025)

- 129 projects → **\$4.4Bn**
- +26 new contracts
- Target: **\$1.85Bn** (2025/26)
- Investors: China, Türkiye
- Focus: textiles & industry

TOP 5 PROJECTS 2025 BY PORTS

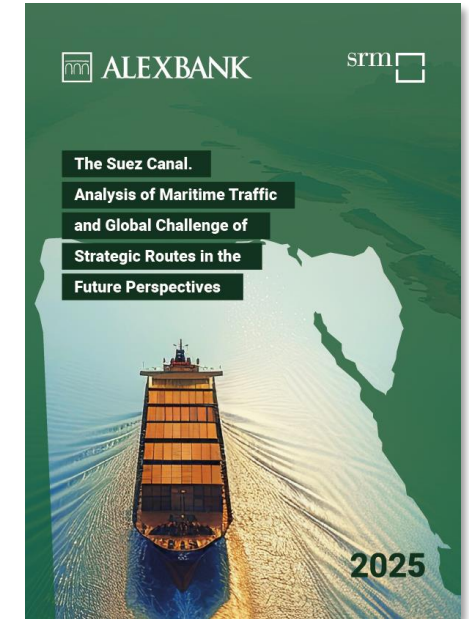
SOKHNA

- Metal industries → **\$1.65Bn** (China)
- Automotive tires → **\$1Bn** (China)
- Phosphate → **\$1Bn** (China)
- Solar panels → **\$685M** (China)
- Chemicals → **\$500M** (China)

WEST QANTARA

- Textiles → **\$130M** (China)
- Textile factory → **\$120M** (Türkiye)
- Packaging → **\$60M** (China)
- Textile factory → **\$52.6M** (China)
- Travel → **\$50M** (China)

Source: SRM and Alexbank on various data



Italy – North Africa Maritime Traffic

Jan-Sept 2024 vs 2025

Italy vs world

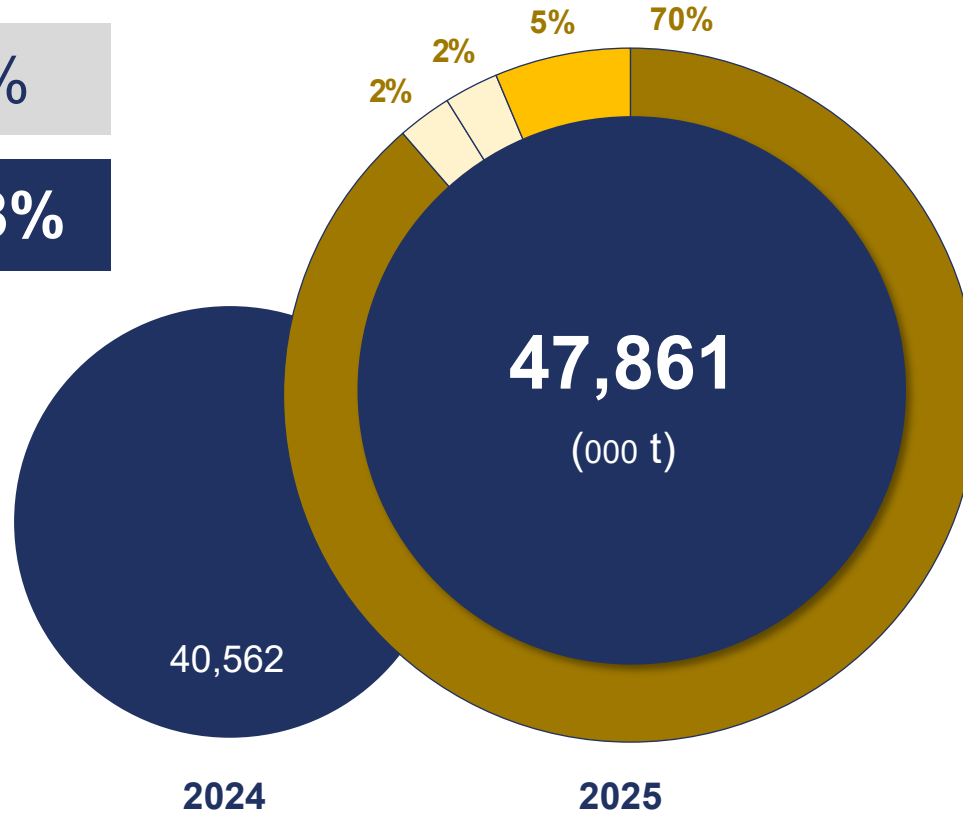
↑ +4%

Italy vs North Africa

↑ +18%

Italy–North Africa maritime traffic grew over four times faster than total Italian traffic.

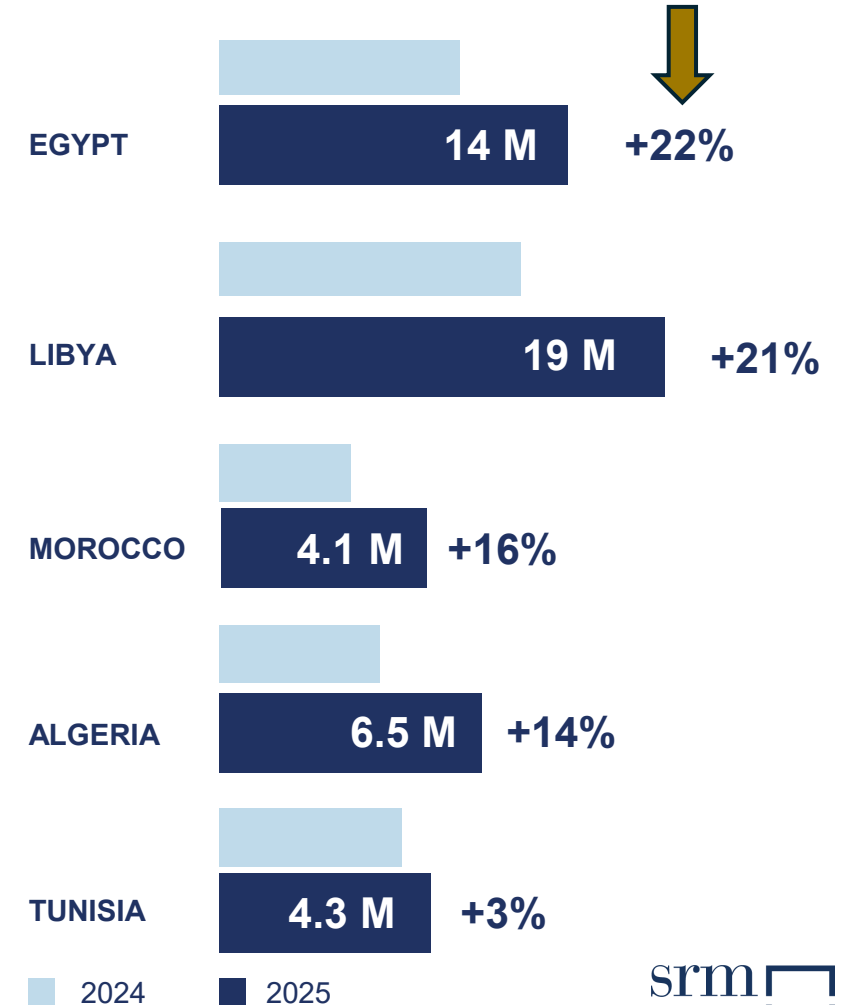
Liquid bulk dominates with ~70% of total traffic.



Commodity Breakdown Jan-Sept 2024 vs 2025



Libya and Egypt are rapidly expanding their trade with Italy.





Thank you for your attention



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