

The  
**great**  
connection



*CANAL DE PANAMÁ*

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**Manager, Strategic Relations**  
**February 2017**

# The Expanded Panama Canal

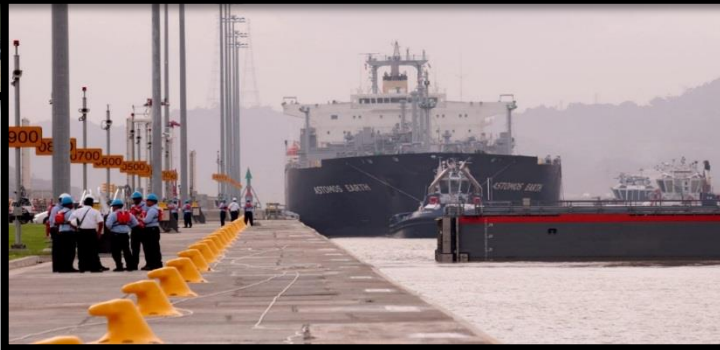




**First drybulk transit: Carouge**  
**177,000 DWT**  
**Beam 45.01 m**

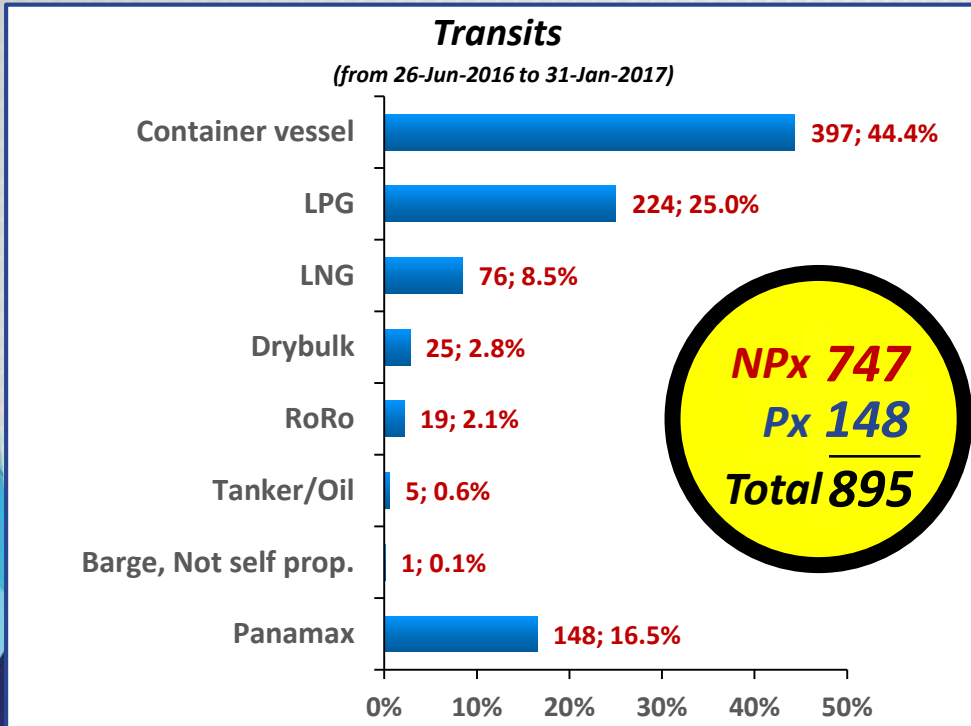


**Aegean Unity**  
**of Suezmax Oil Tanker**  
**Vessel**

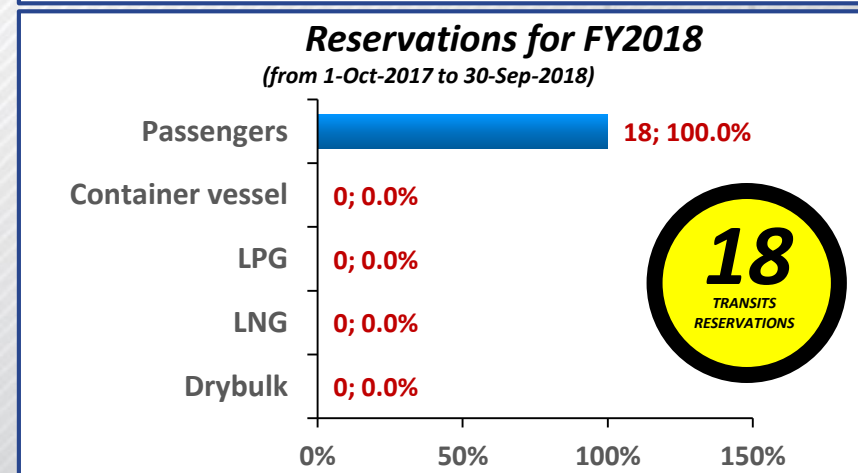
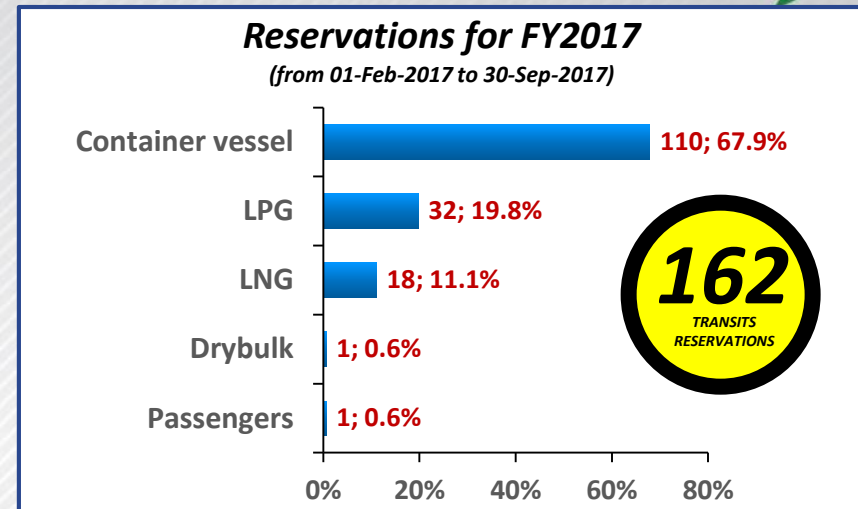


# Neopanamax Locks

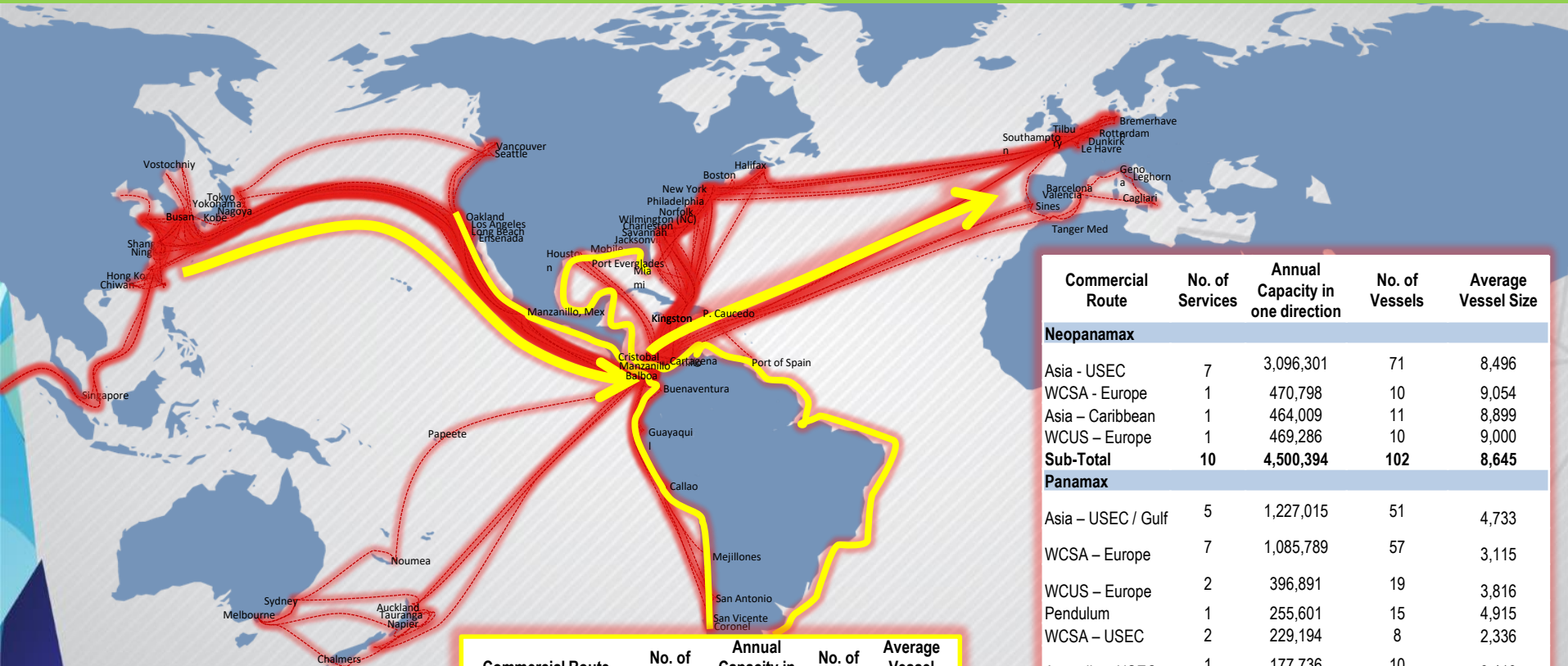
## Vessels Transits and Booking Reservations



Updated as of 31-Ene-2017 (inclusive)



# Liner Services Connectivity of Panama



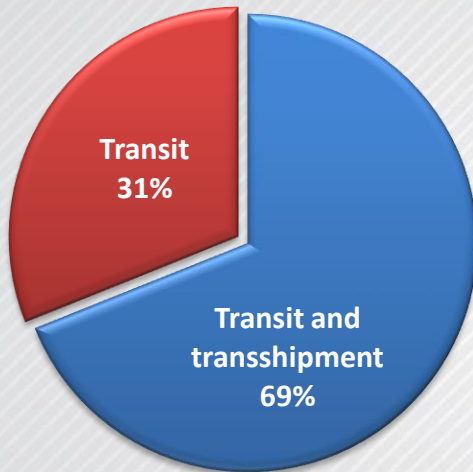
Source: ACP MEMN, Compair Data, October 2016

Commercial Route	No. of Services	Annual Capacity in one direction	No. of Vessels	Average Vessel Size
Feeder Services Atlántico	25	2,508,995	76	2,469
Feeder Services Pacífico	14	3,031,557	86	6,483
<b>Total</b>	<b>39</b>	<b>5,540,552</b>	<b>162</b>	

Commercial Route	No. of Services	Annual Capacity in one direction	No. of Vessels	Average Vessel Size
<b>Neopanamax</b>				
Asia - USEC	7	3,096,301	71	8,496
WCSC - Europe	1	470,798	10	9,054
Asia - Caribbean	1	464,009	11	8,899
WCUS - Europe	1	469,286	10	9,000
<b>Sub-Total</b>	<b>10</b>	<b>4,500,394</b>	<b>102</b>	<b>8,645</b>
<b>Panamax</b>				
Asia - USEC / Gulf	5	1,227,015	51	4,733
WCSC - Europe	7	1,085,789	57	3,115
WCUS - Europe	2	396,891	19	3,816
Pendulum	1	255,601	15	4,915
WCSC - USEC	2	229,194	8	2,336
Australia - USEC	1	177,736	10	3,418
Australia - Europe	1	73,446	7	2,825
<b>Sub-Total</b>	<b>19</b>	<b>3,445,672</b>	<b>167</b>	<b>3,878</b>
<b>Total</b>	<b>29</b>	<b>7,946,066</b>	<b>269</b>	<b>5,685</b>

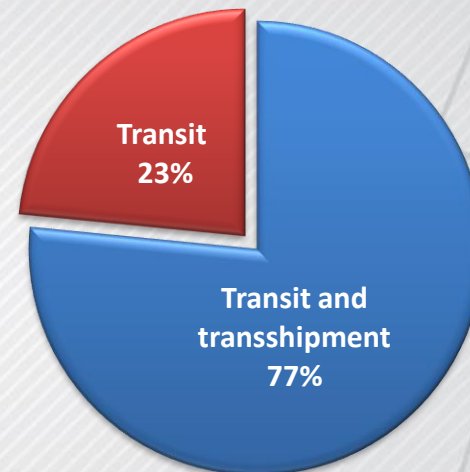
# Liner Services Deployed Capacity Local Port Calls and Panama Canal Transits

April 2016



	Annual Capacity in TEUs Two ways
Transit and transshipment	8,389,757
Transit and no transshipment	3,778,751
<b>Total</b>	<b>12,168,508</b>

October 2016

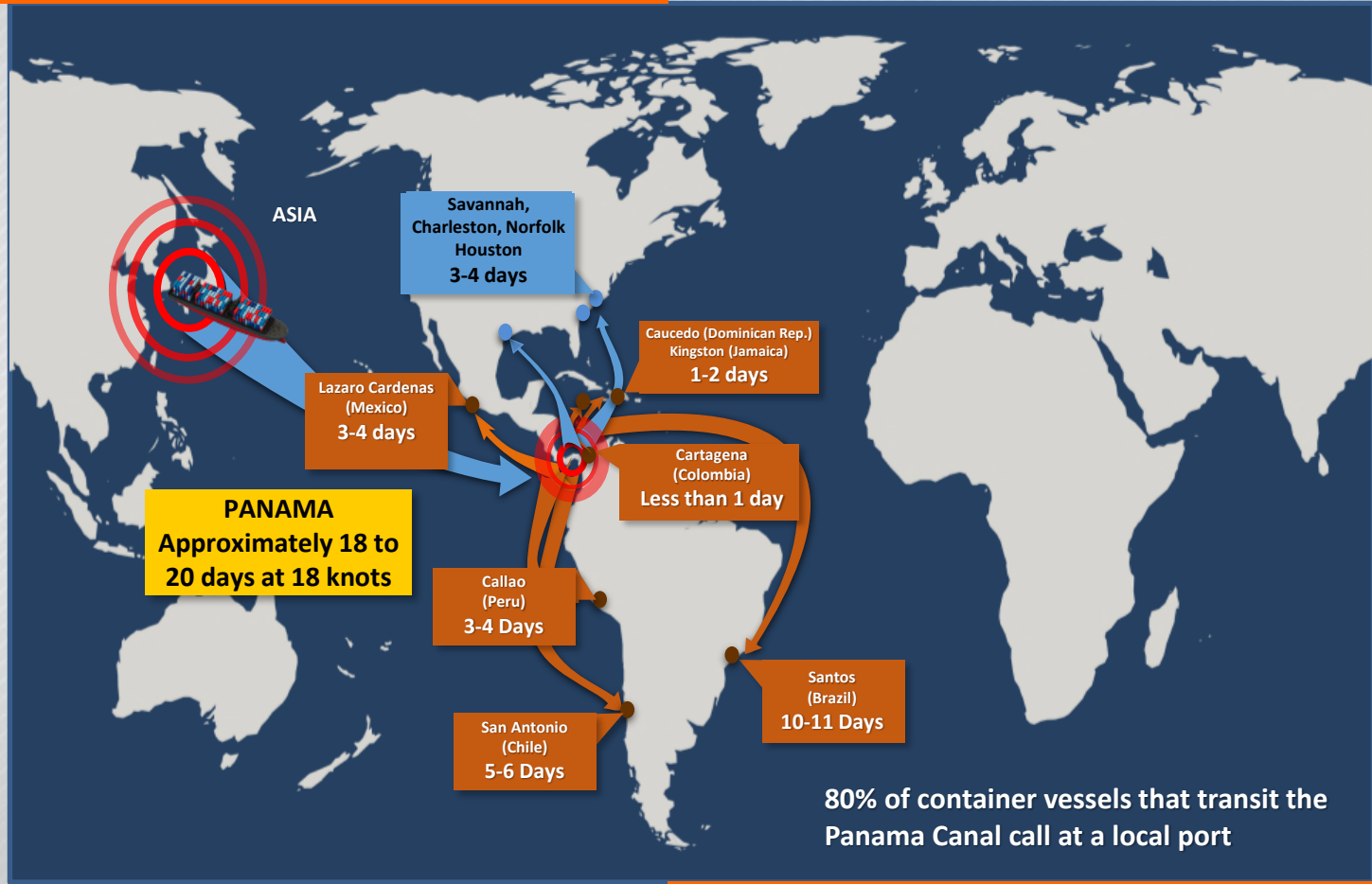


	Annual Capacity in TEUs Two ways
Transit and transshipment	10,336,538
Transit and no transshipment	3,061,842
<b>Total</b>	<b>13,398,380</b>

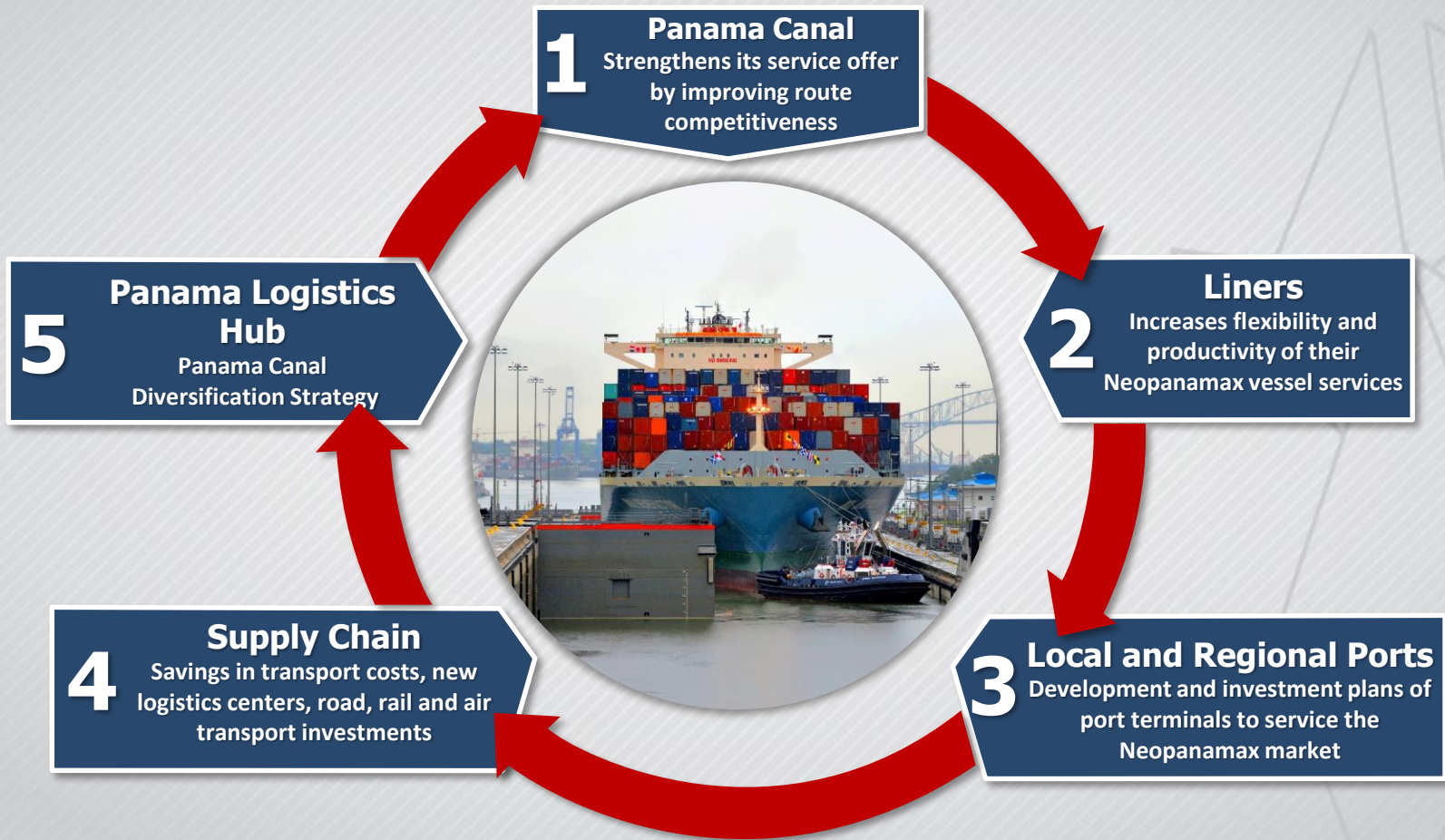
Source: Compairdata/MEMN, October, 2016

# The Panama Canal

It's all about Reliability, Connectivity, and Value Added Services



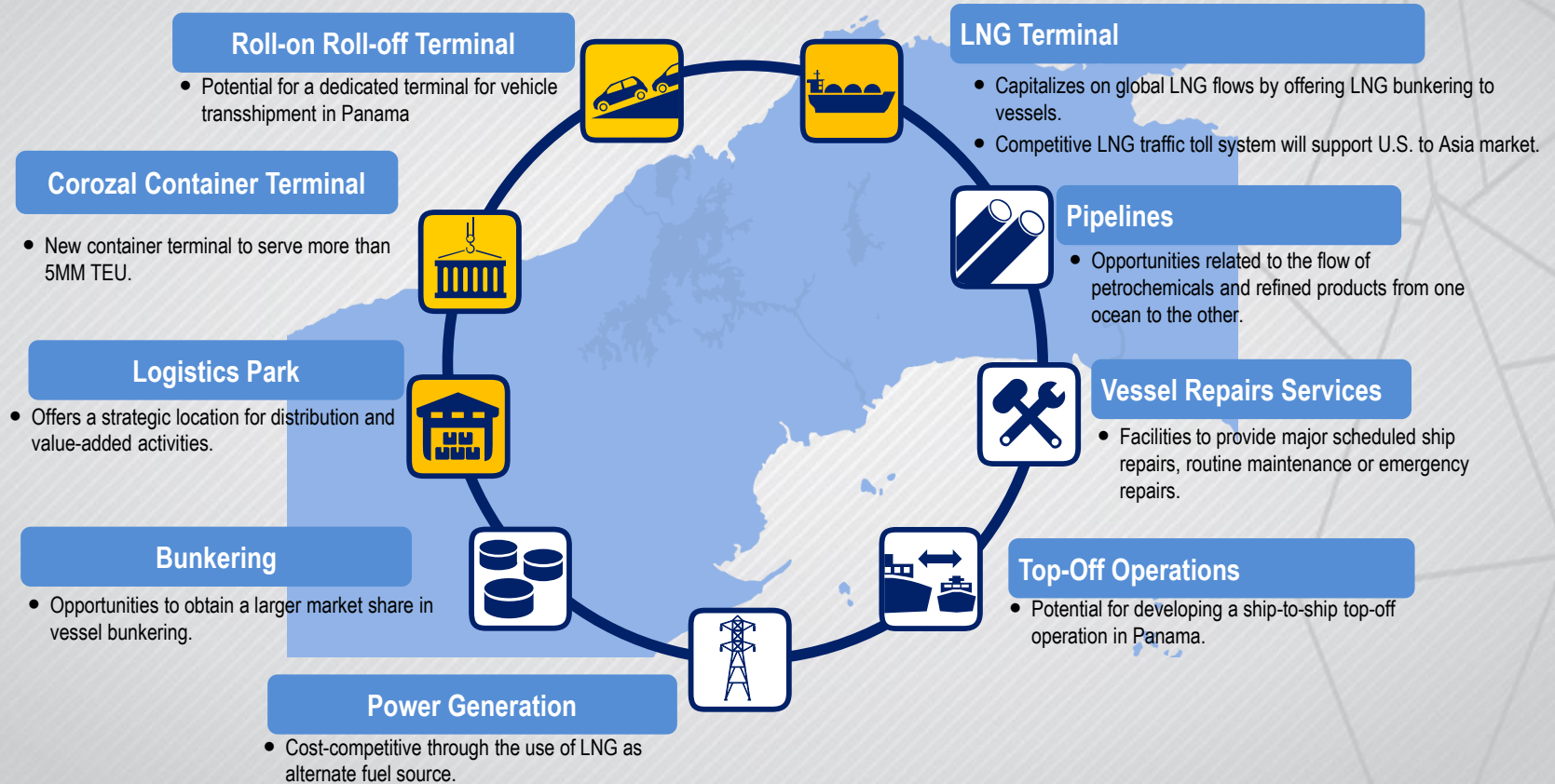
# Impact of the Panama Canal Expansion





# Diversification Strategy

## Areas with development potential





### PHASE 2

52 hectares  
2.1 million TEUs  
12 cranes  
25 E-RTGs

731m

### PHASE 1

67 hectares  
3.2 million TEUs  
20 cranes  
49 E-RTGs

1,350m

- \$1 Billion
- Construction:
  - Phase I: 1,300 jobs
  - Phase II: 800 jobs
- Operation:
  - Phase I: 2,600
  - Phase II: 1,200
- Contribution: \$25 - \$100 (2018 – 2038)
- Added-value to the Route:  
\$60 – 70 M/annually

## NEW CONTAINER TERMINAL IN COROZAL

# Pre-qualified Port Operators

 Lifting Global Trade.  
**APM TERMINALS**

 **PSA**  
*The World's Port of Call*

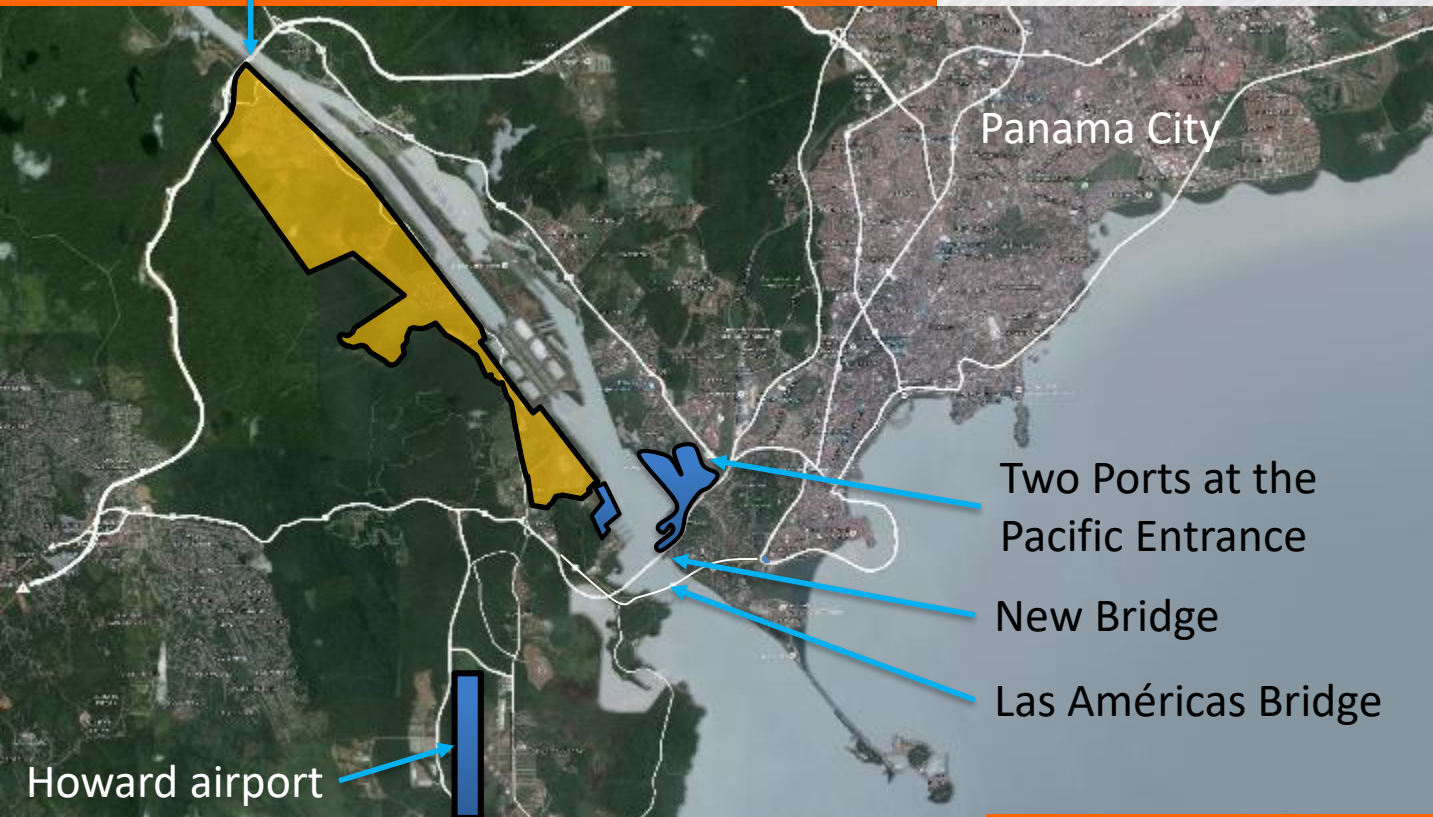
 Terminal Investment Limited SA

  
**TERMINAL LINK**

# Connectivity of 1,200 Hectares

- Howard airport
- Two world class ports
- Interoceanic waterway (13,000 vessels a year)
- Two existing bridges (a third is under construction)

Centennial Bridge



Panama City

Two Ports at the Pacific Entrance

New Bridge

Las Américas Bridge

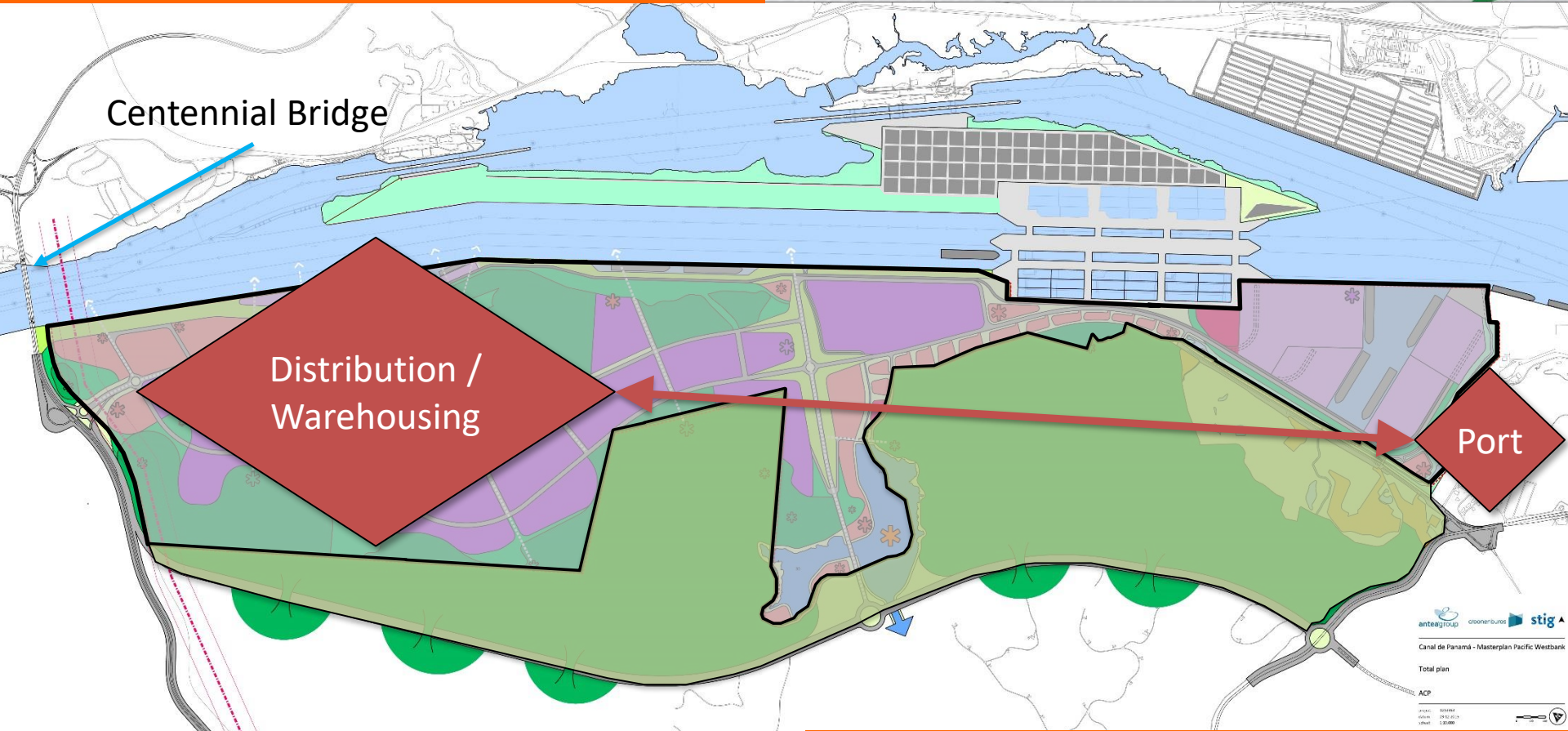
Howard airport

1200 HECTARES

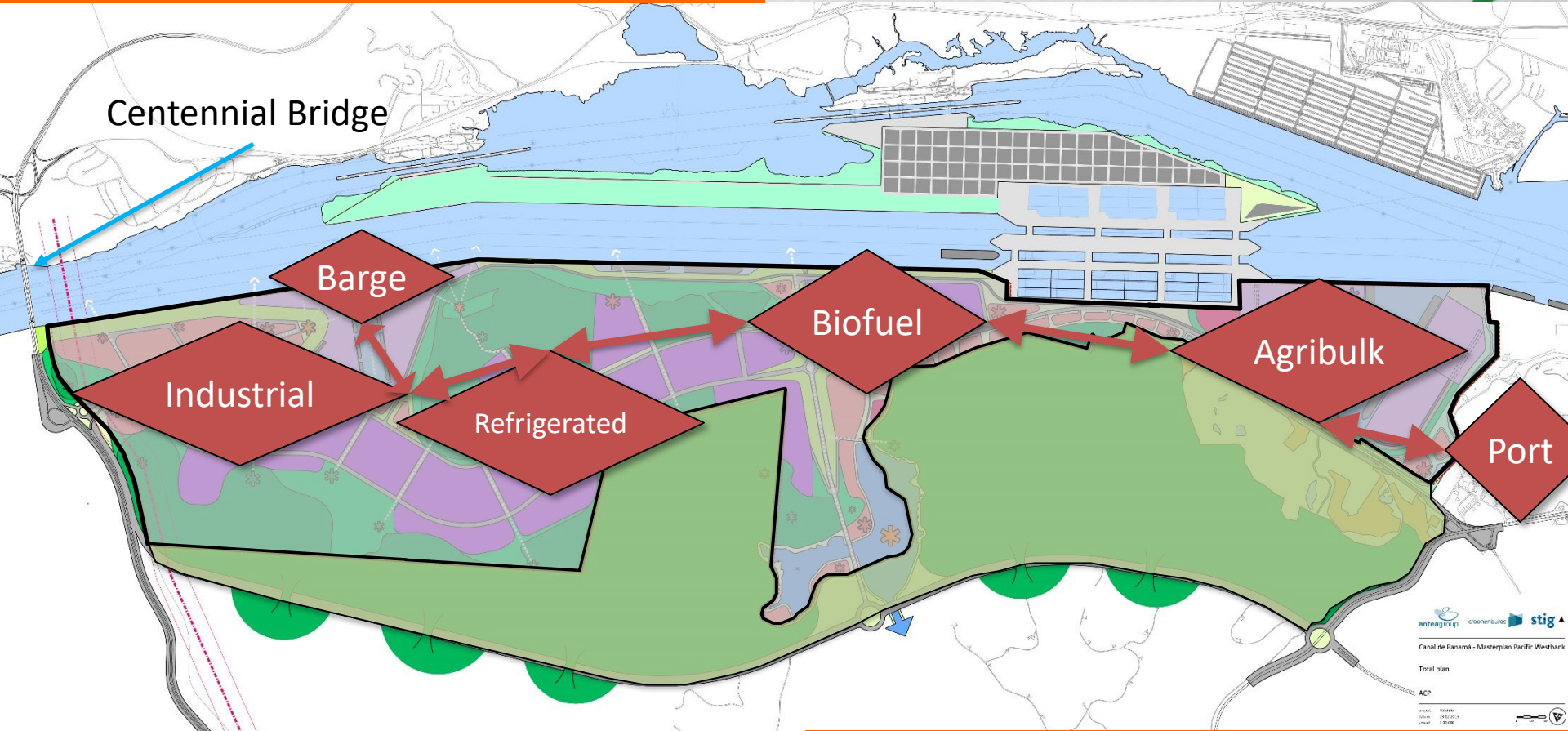


Commercial development of approximately 1,200 hectares of recovered area located on the West Bank of the Panama Canal.  
Potential creation of a special economic zone for logistics/industrial parks space.

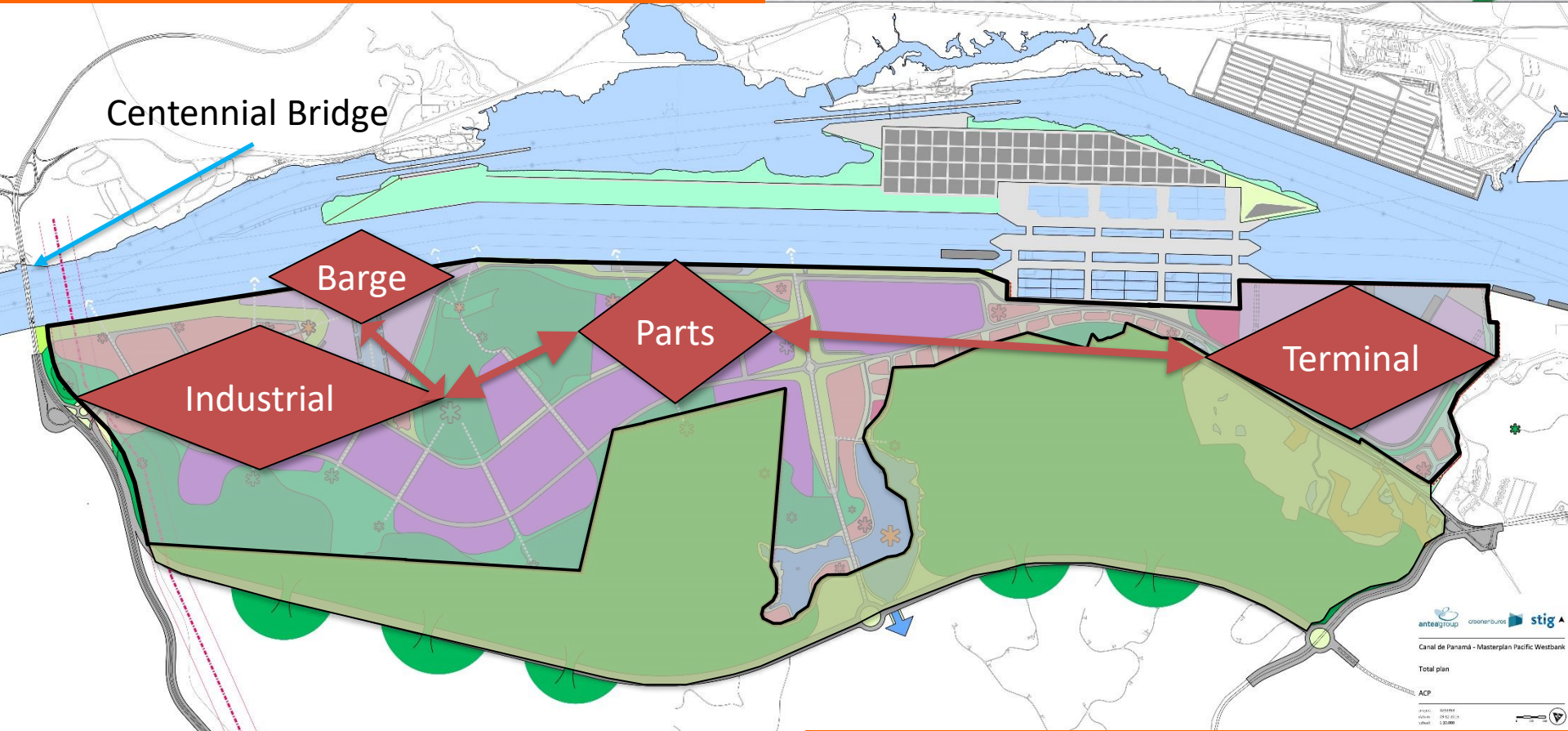
# Activity: Logistic Parks



# Activity: Food/Perishable Goods



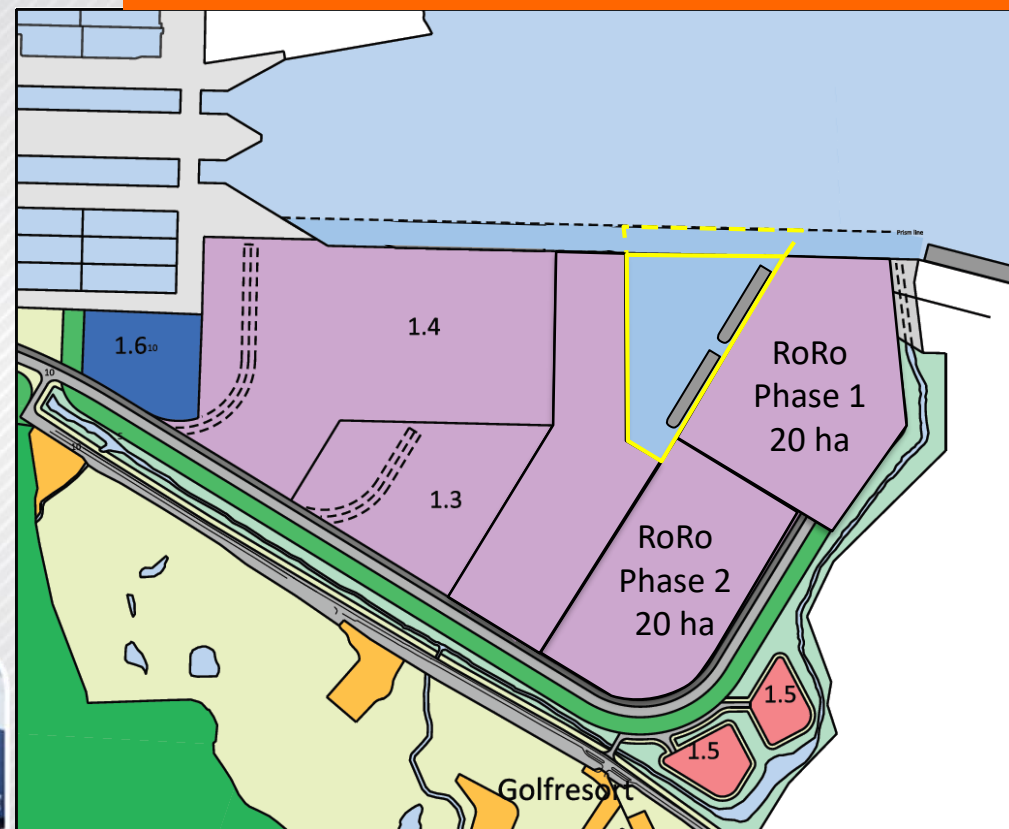
# Activity: Vehicles and Heavy Equipment



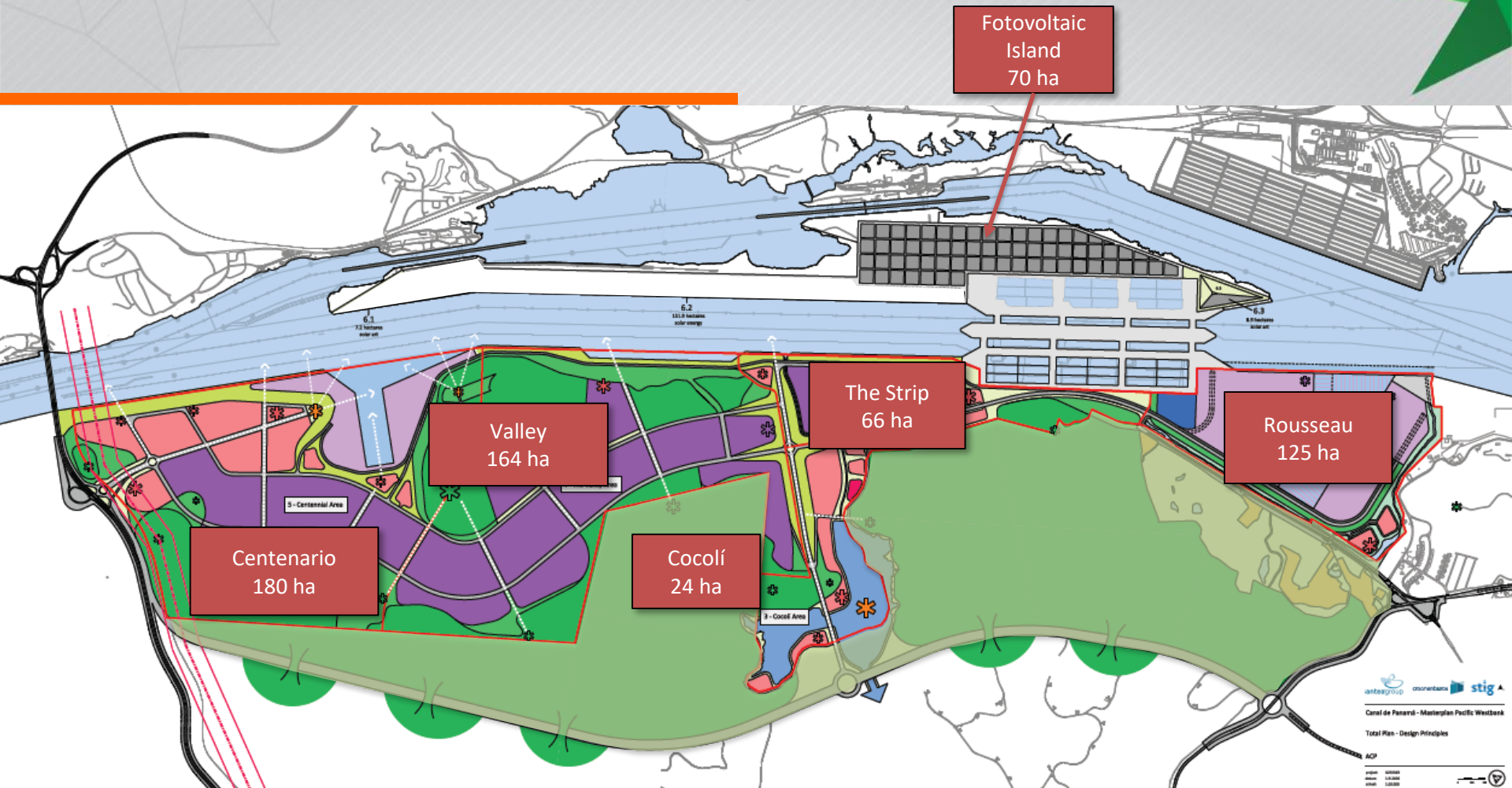


# Ro Ro Terminal in Two Phases

- Focus on vehicles and heavy equipment
- Mainly a transshipment facility
- May include accesorization
- Performing additional geotechnical studies



# Five Development Areas



# Rendering of Rousseau Area



New waterfront area for RoRo terminals, multipurpose terminals

# Rendering - Cocolí Area



Artificial lake and Business Park

# Rendering – Valley Area



Logistics & industrial area: warehouses, light industries, etc.

# Rendering Centennial Area/ barge terminal



Business park and barge terminal area



# LNG Terminal

## Analyze the potential market demand for LNG :

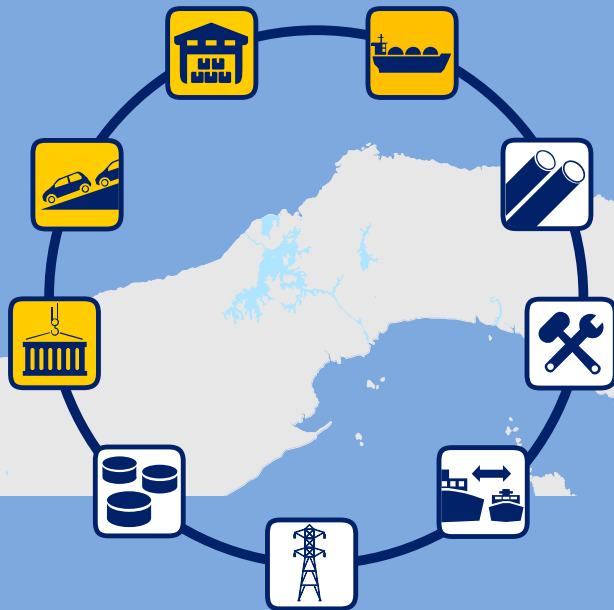
- Supply vessels transiting the Canal and/or arriving Panamanian ports
- Supply ACP power generation facilities
- Regional redistribution



First LNG vessel  
transit  
Maran Gas  
Apollonia  
July 25, 2016



# Long Term View



- **Promote the development of commercial activities that complement Canal operations, with the participation of the private sector.**
- **Strengthen Panama's maritime and logistics cluster through commercial activities that add value to the Panama canal route.**



 CANAL DE PANAMÁ