

Freight Movement in Panama



Diego Ferrer

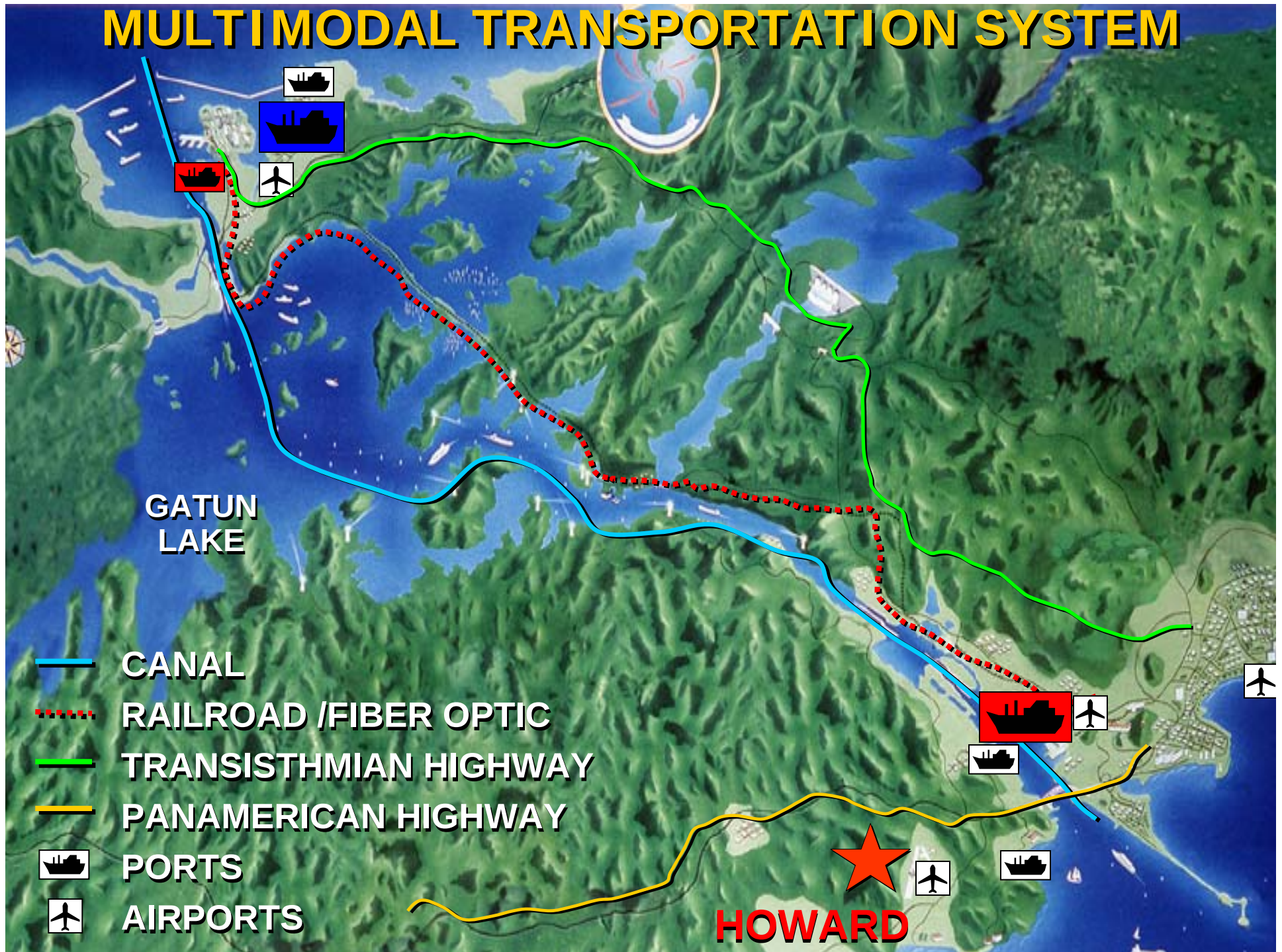
Embassy of Panama

dferrer@embassyofpanama.org

Unique Geographic Position



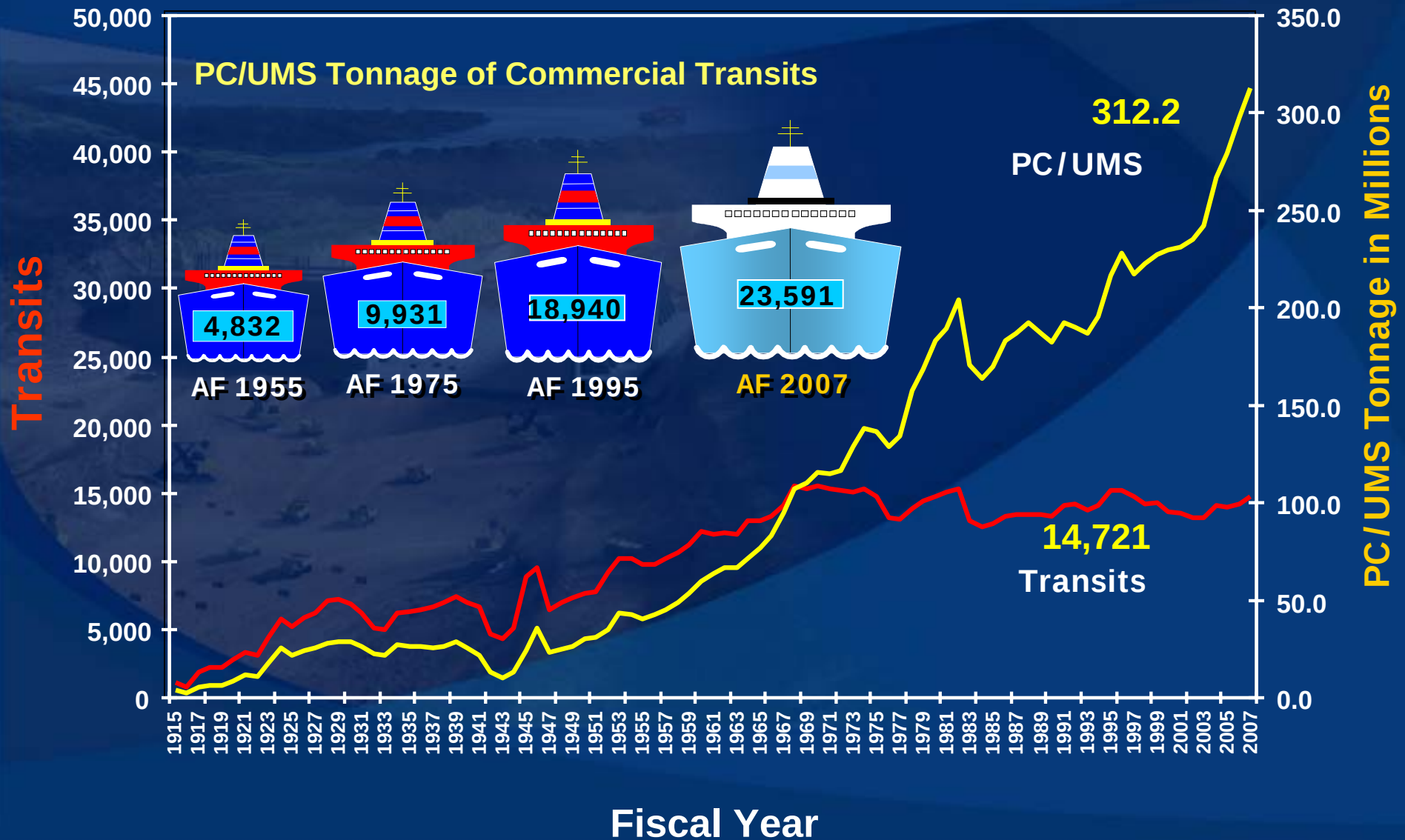
MULTIMODAL TRANSPORTATION SYSTEM



The Panama Canal and Freight Movement

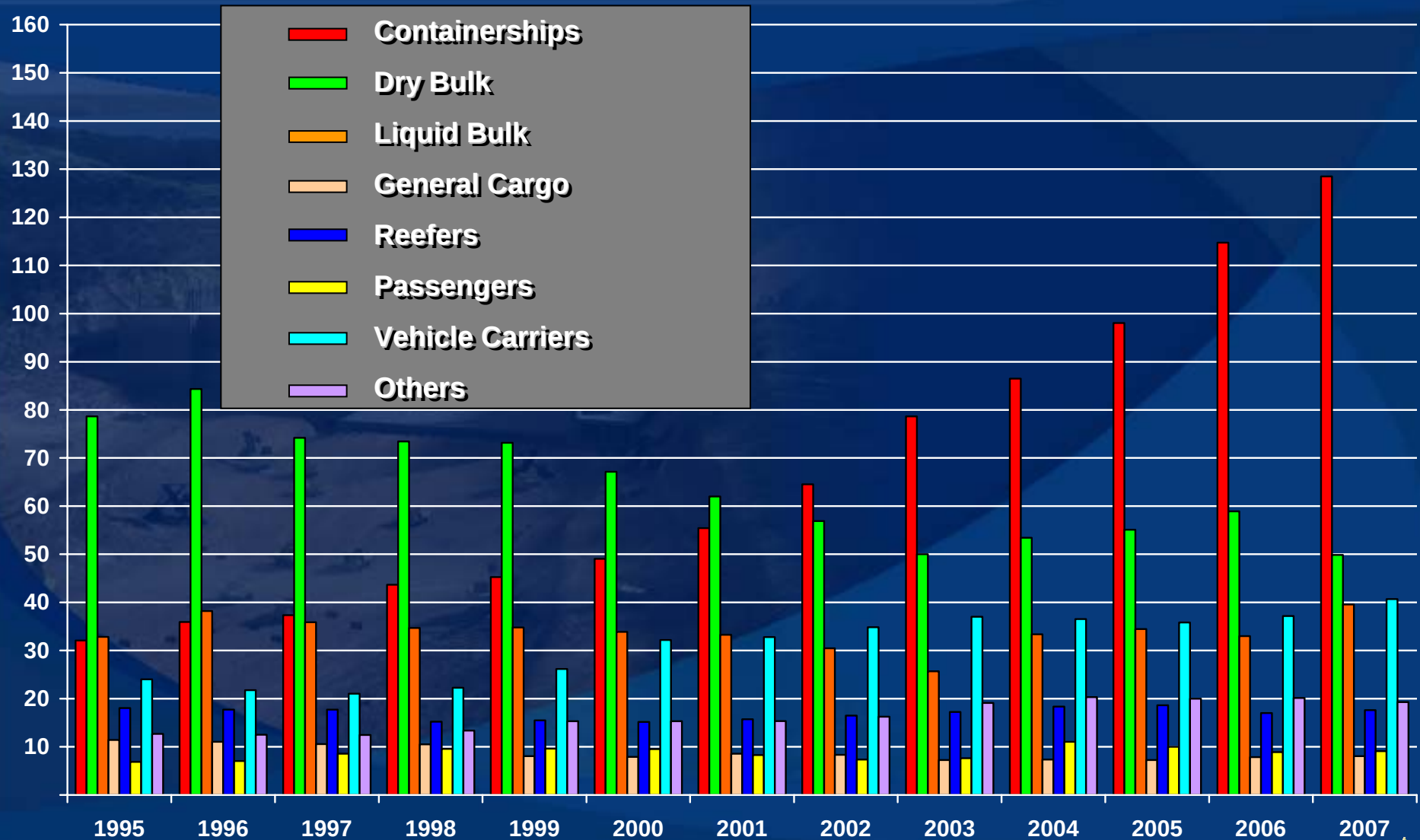


Transits vs. PC/UMS Tonnage FY1915 – FY2007

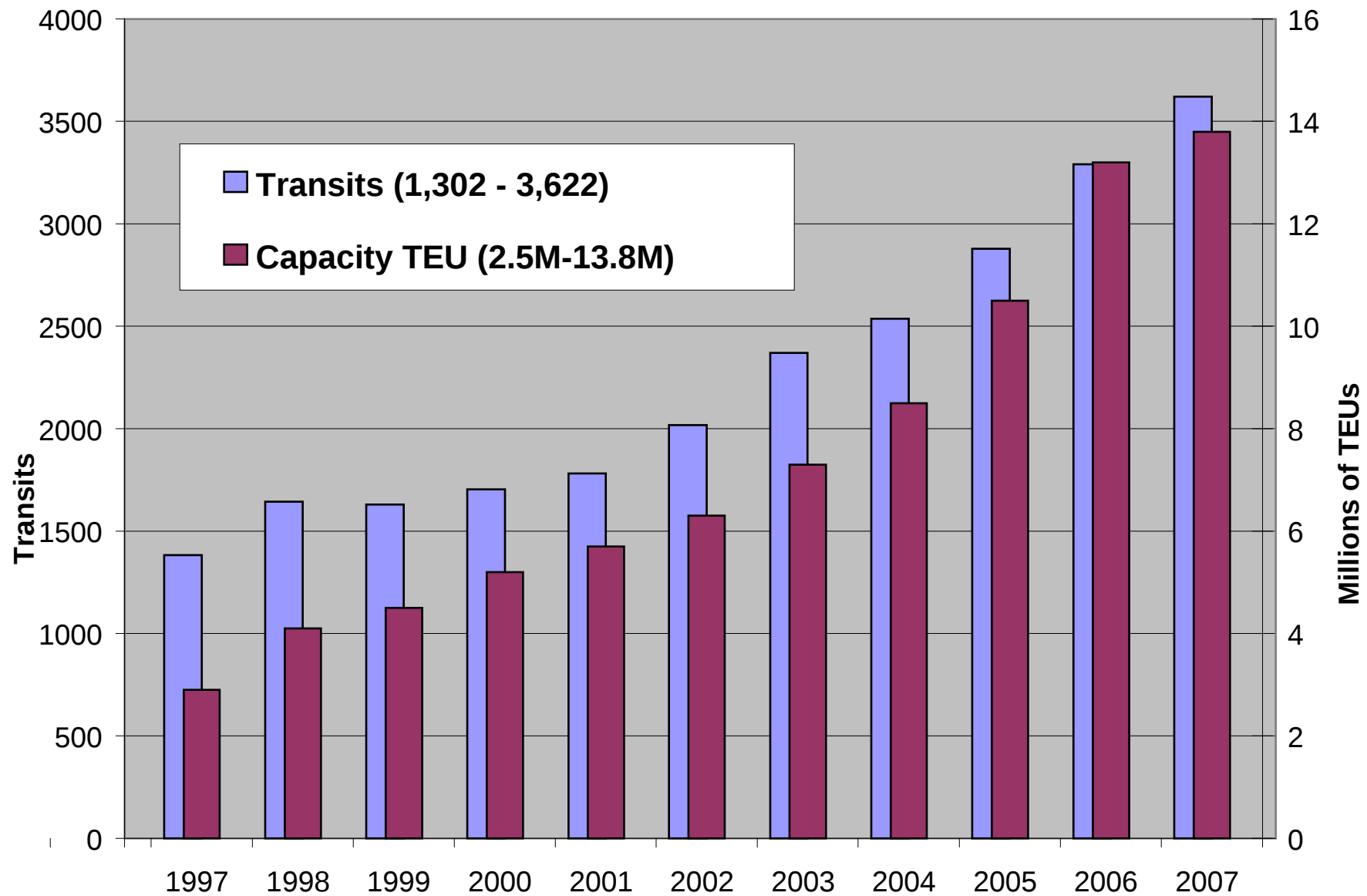


PC/UMS by Market Segment

(in millions - FY 1995-2007)

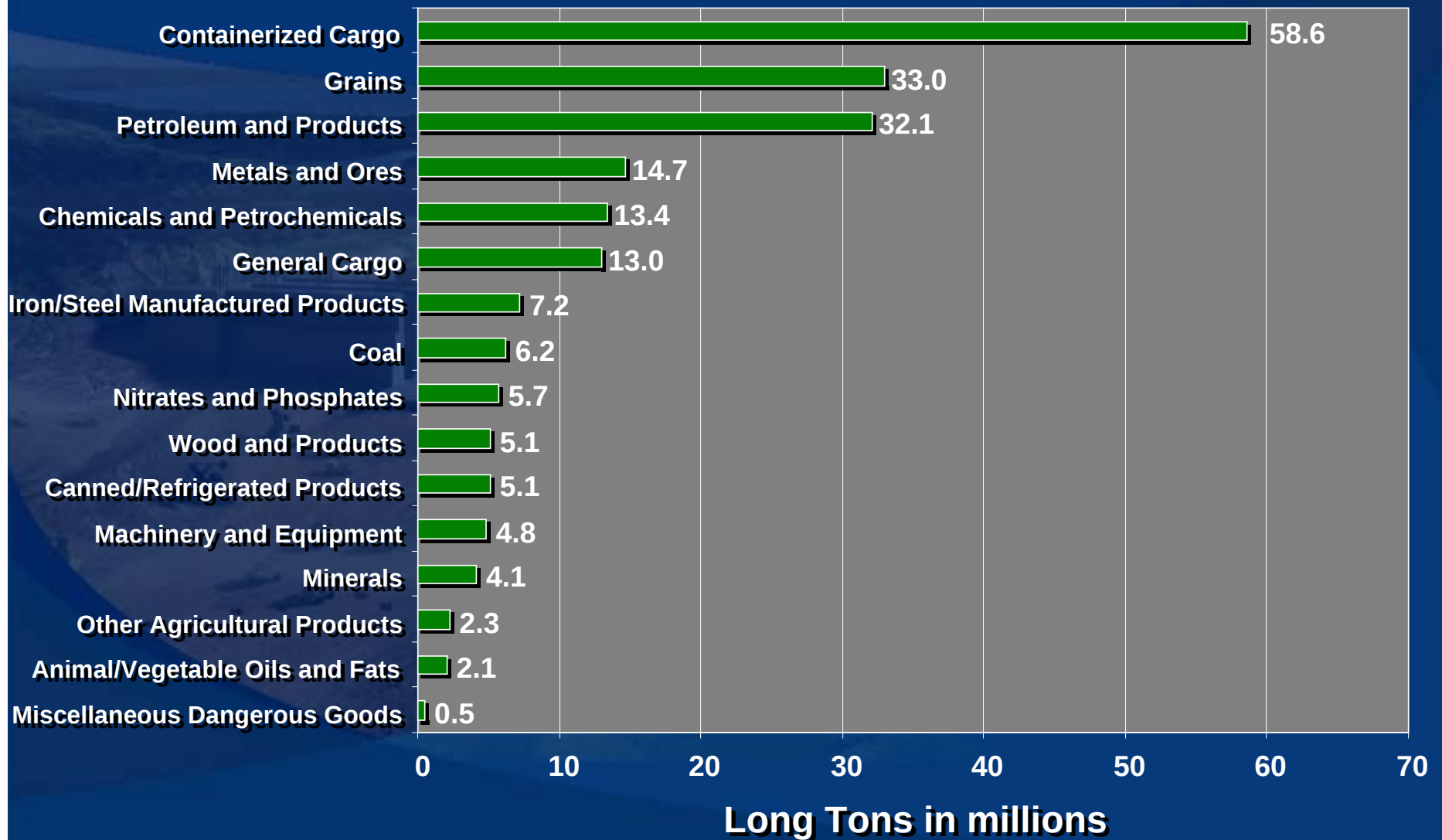


Growth of container traffic through the Panama Canal (1997 - 2007)

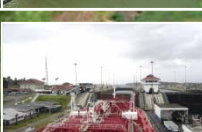


Based on the capacity of transiting vessels – Source: CompairData

Principal Commodities that Transit the Panama Canal Fiscal Year 2007



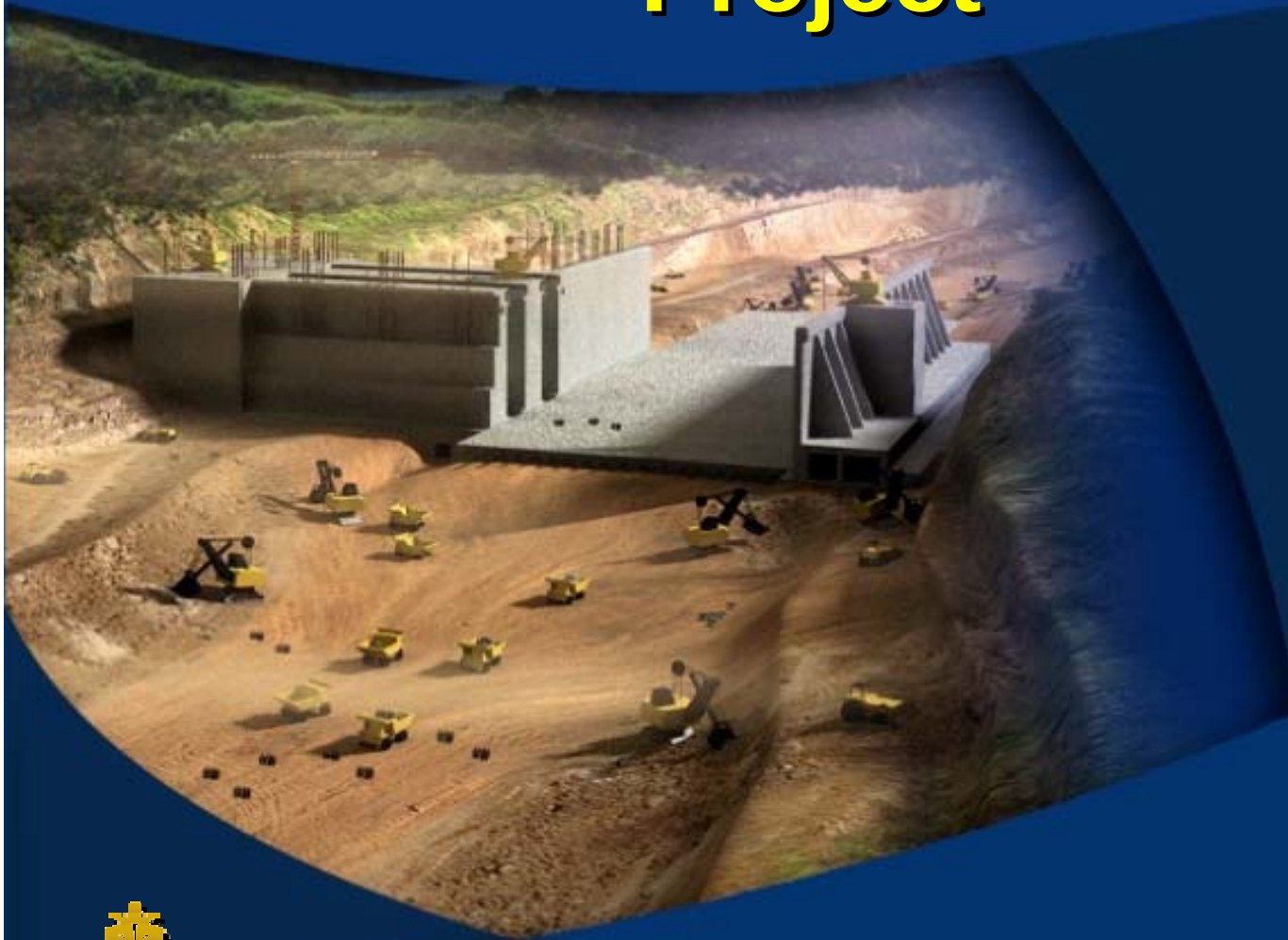
Toll Revenue by Market segments

Segments		2006		2007	
<i>Containers</i>		\$503M	49 %	\$682M	56 %
<i>Dry bulk</i>		\$170M	17 %	\$163M	13 %
<i>Car Carriers</i>		\$100M	10 %	\$106M	9 %
<i>Liquid bulk</i>		\$91M	9 %	\$107M	9 %
<i>Others</i>		\$59M	6 %	\$61M	5 %
<i>Refrigerated</i>		\$53M	5 %	\$57M	5 %
<i>Passenger ships</i>		\$26M	3 %	\$26M	2 %
<i>General Cargo</i>		\$25M	2 %	\$25	2 %

through life



The Panama Canal Expansion Project

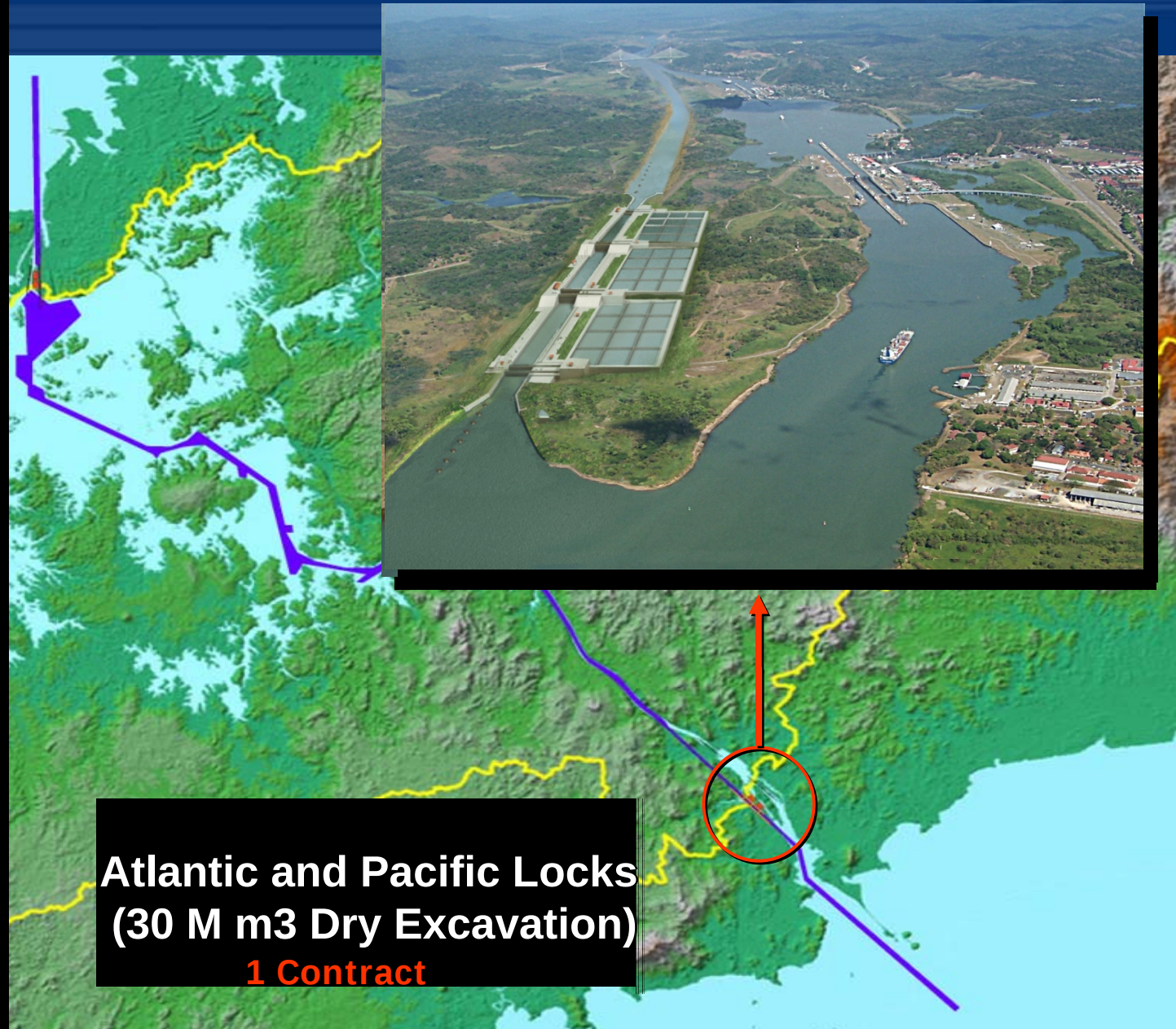


Post Panamax Locks

**Atlantic and Pacific Locks
(30 M m³ Drv Excavation)
1 Contract**



Post Panamax Locks

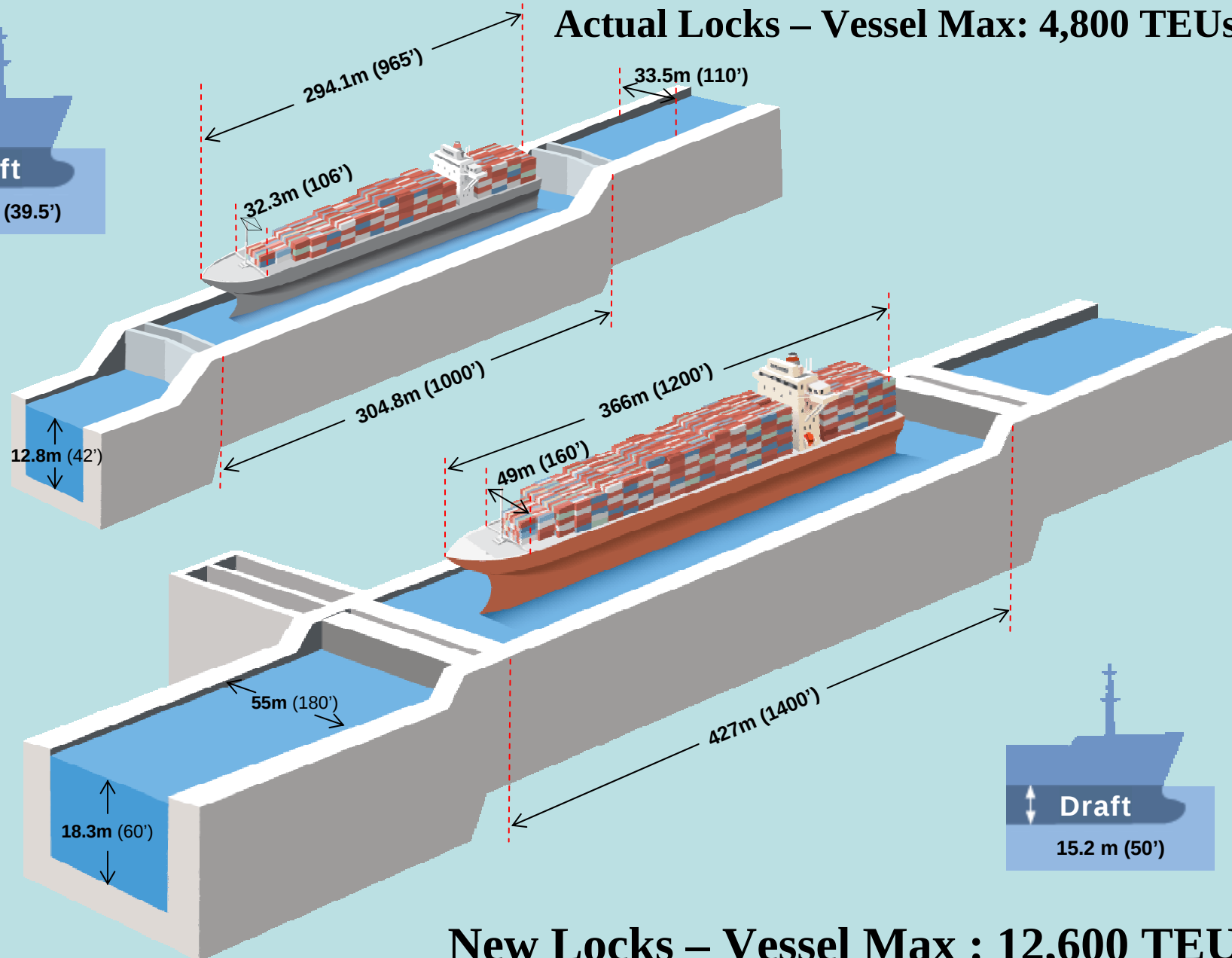


Conceptual Design



New Locks Dimensions

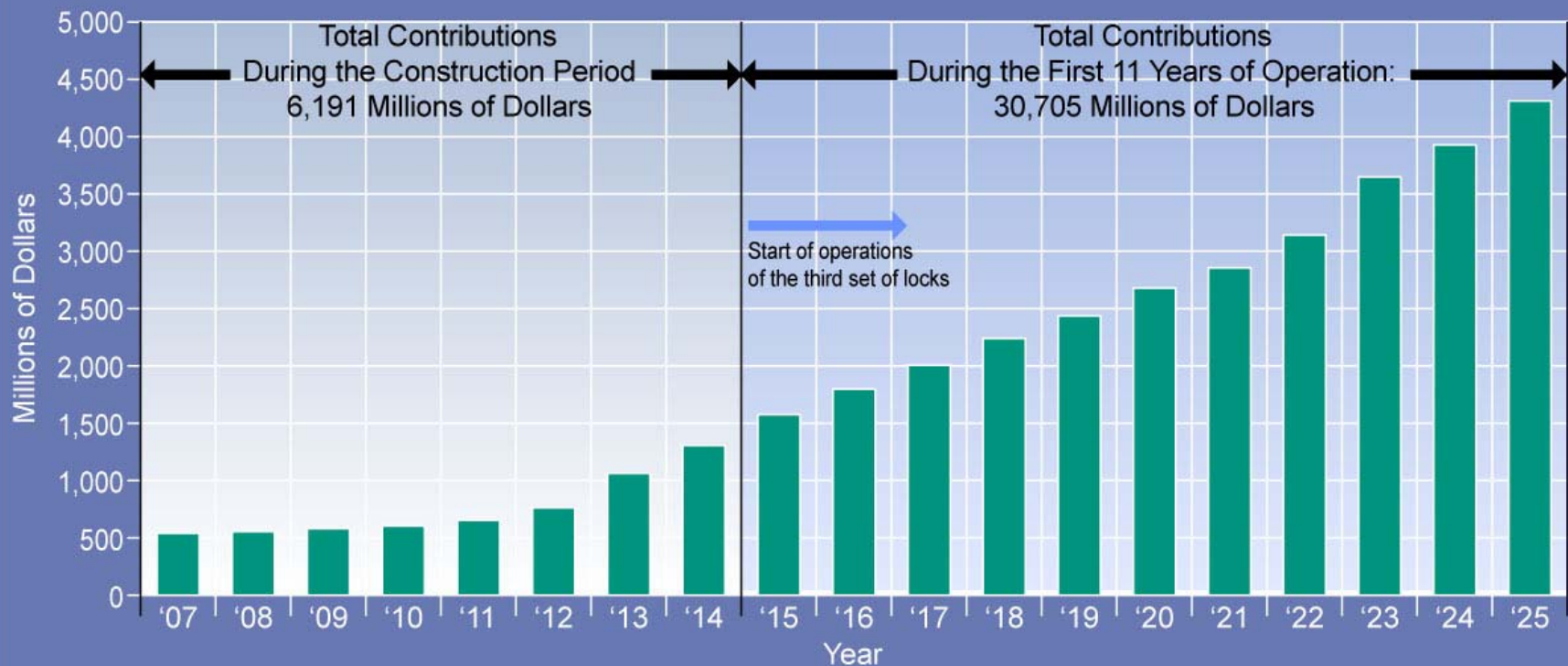
Actual Locks – Vessel Max: 4,800 TEUs



New Locks – Vessel Max : 12,600 TEUs

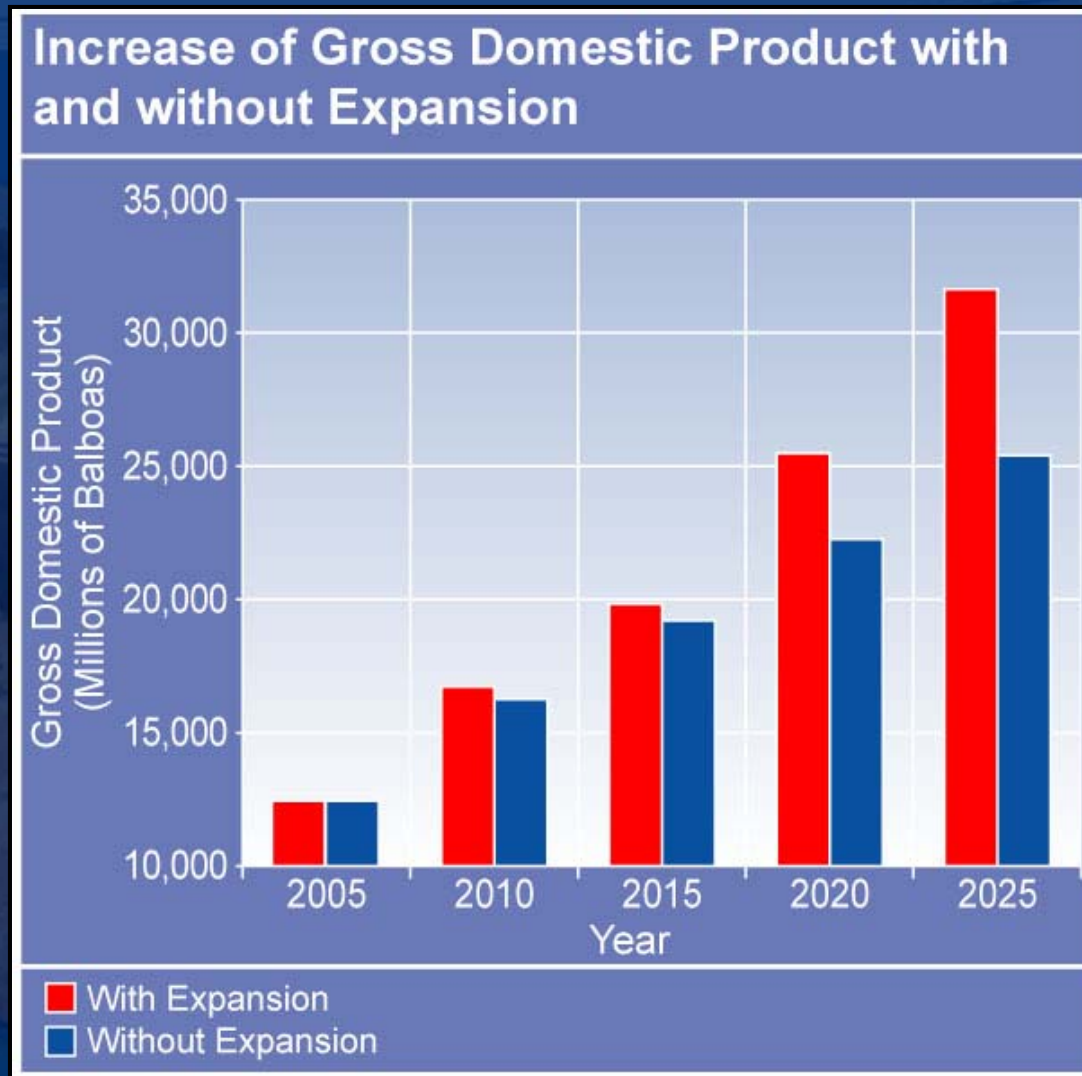
Contributions to the Panamanian Treasury

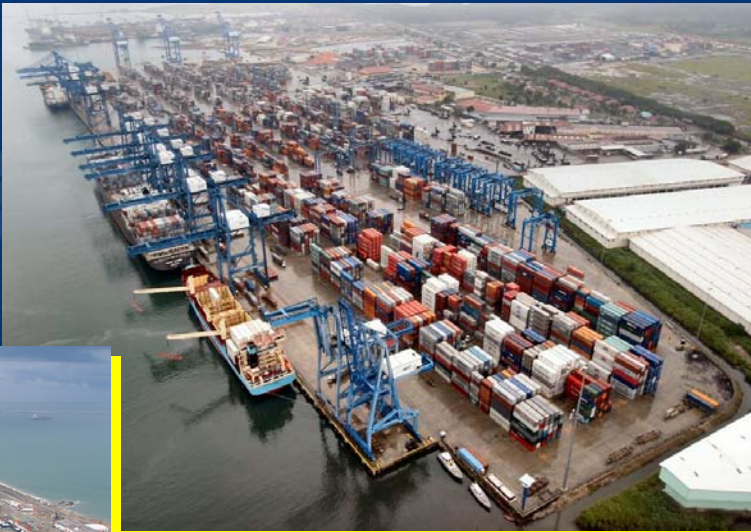
Direct Contributions of the Expanded Canal to the National Treasury



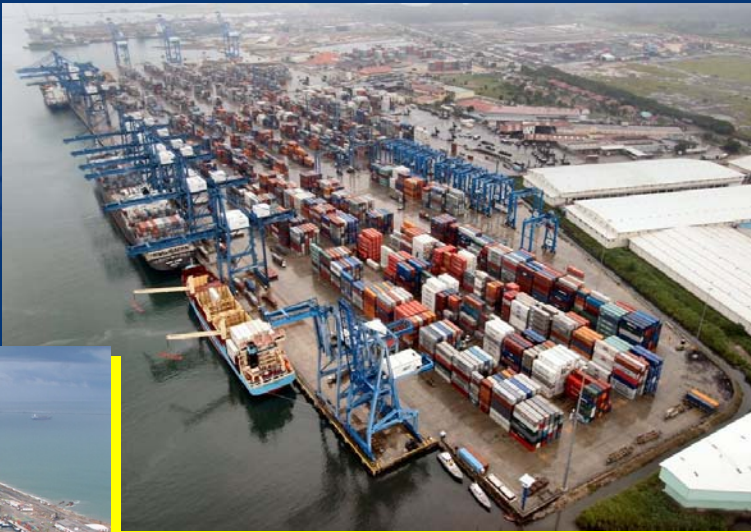
■ Total Contributions of the Expanded Canal

Economic Benefit for the Country

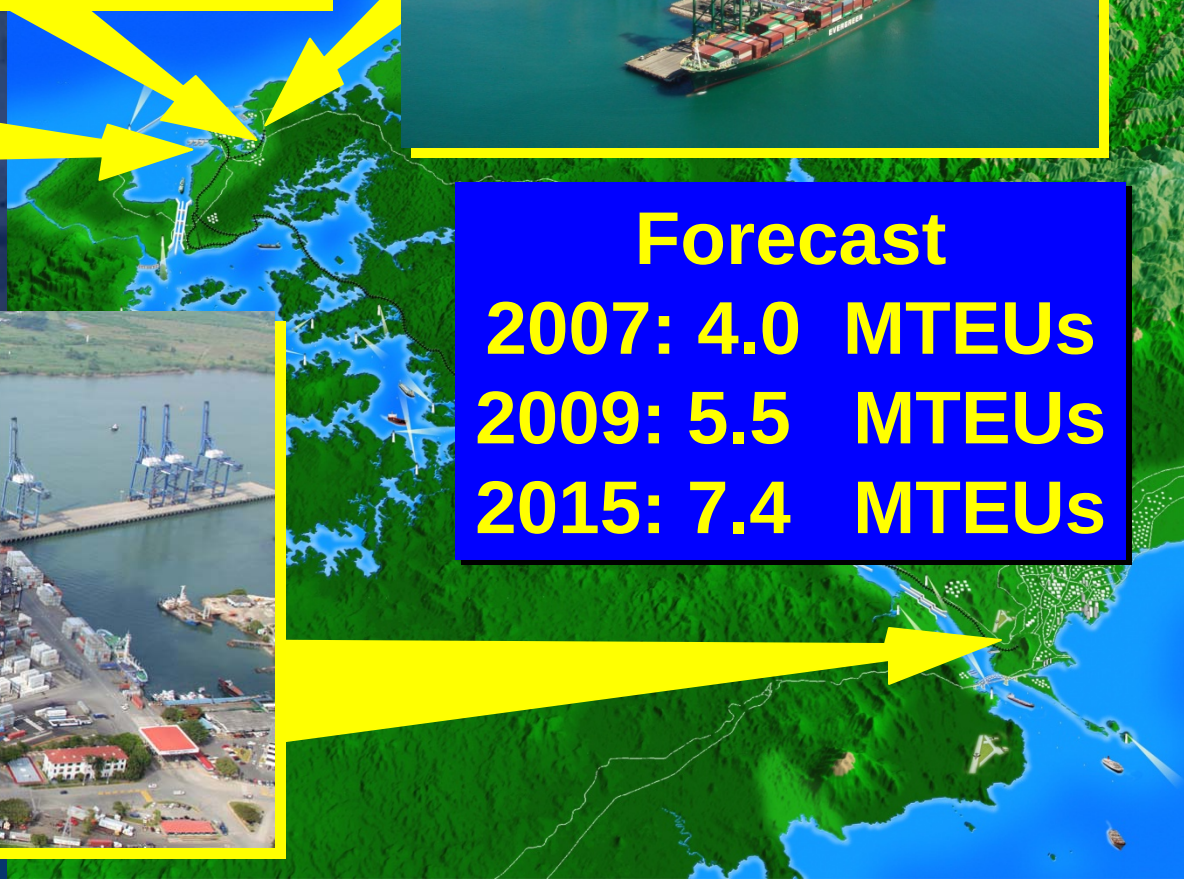
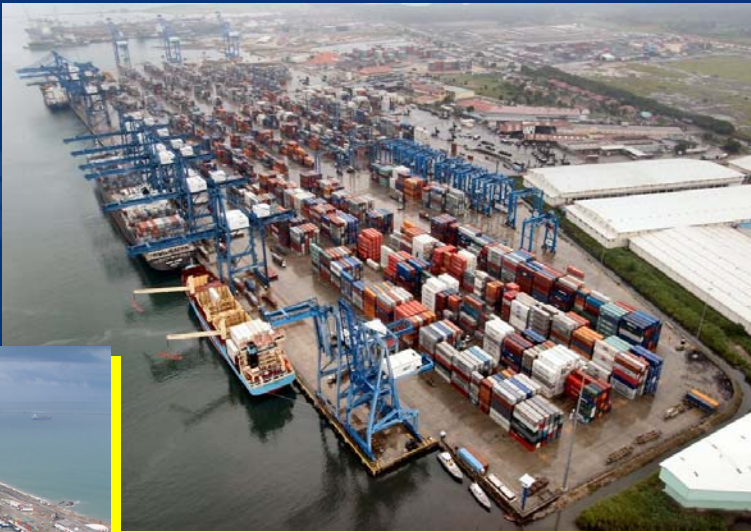




1996: 235 KTEUs
2007: 4.0 MTEUs



	Panamax Cranes	PPX	Total
PPC-BCZ	7	8	15
PPC-CRI	3	3	6
CCT	4	6	10
MIT	2	14	16
	16	31	47



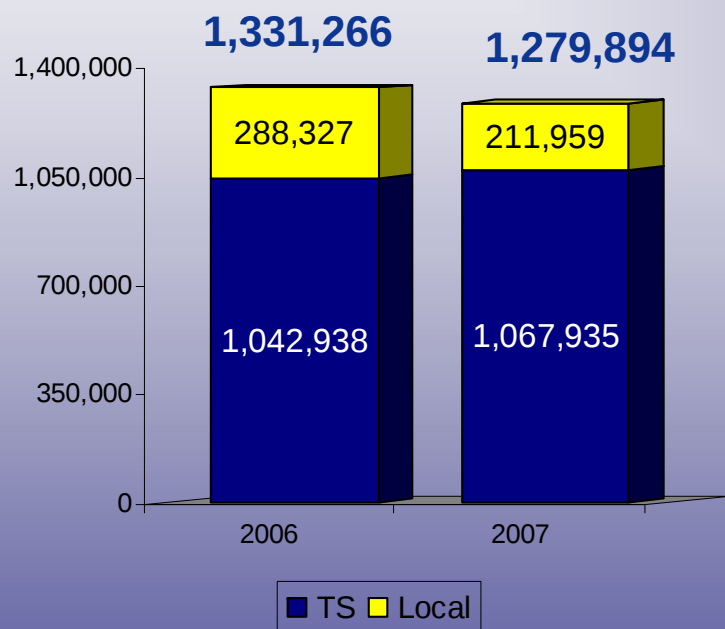
Forecast
2007: 4.0 MTEUs
2009: 5.5 MTEUs
2015: 7.4 MTEUs

Manzanillo International Terminal

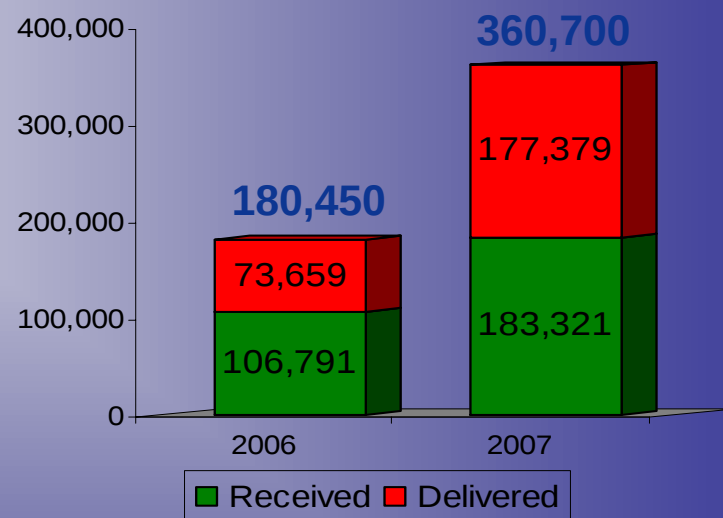


CONTAINER THROUGHPUT (TEUs) 2006 - 2007

VESSEL-RELATED THROUGHPUT



RAIL-RELATED THROUGHPUT





MANZANILLO INTERNATIONAL
TERMINAL - PANAMA, S.A.

CUSTOMERS & CONNECTIVITY

- | | | | |
|--------------------|------------------|------------------|-------------------|
| ■ APL | ■ CSAV | ■ Hyundai Marine | ■ NYK |
| ■ Antillean Marine | ■ China Shipping | ■ K Line | ■ OOCL |
| ■ CCNI | ■ Eukor | ■ Maersk Line | ■ Seaboard Marine |
| ■ CMA CGM | ■ Hamburg Süd | ■ Marfret | ■ Seafreight |
| ■ Crowley | ■ Hapag Lloyd | ■ MOL | ■ WWL |





MANZANILLO INTERNATIONAL
TERMINAL - PANAMA, S.A.

MIT LOGISTICS PARK





MANZANILLO INTERNATIONAL
TERMINAL - PANAMA, S.A.

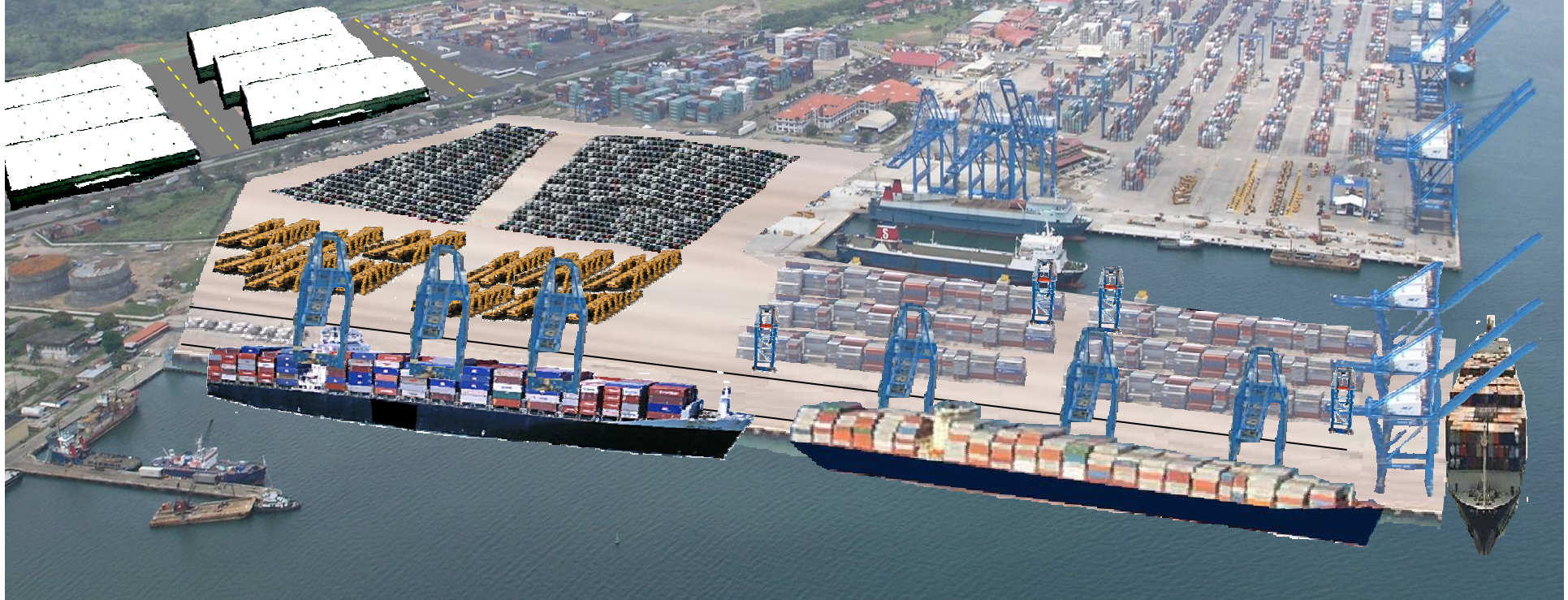
CURRENT FACILITIES
CAPACITY: 2M TEUs





MASTER PLAN

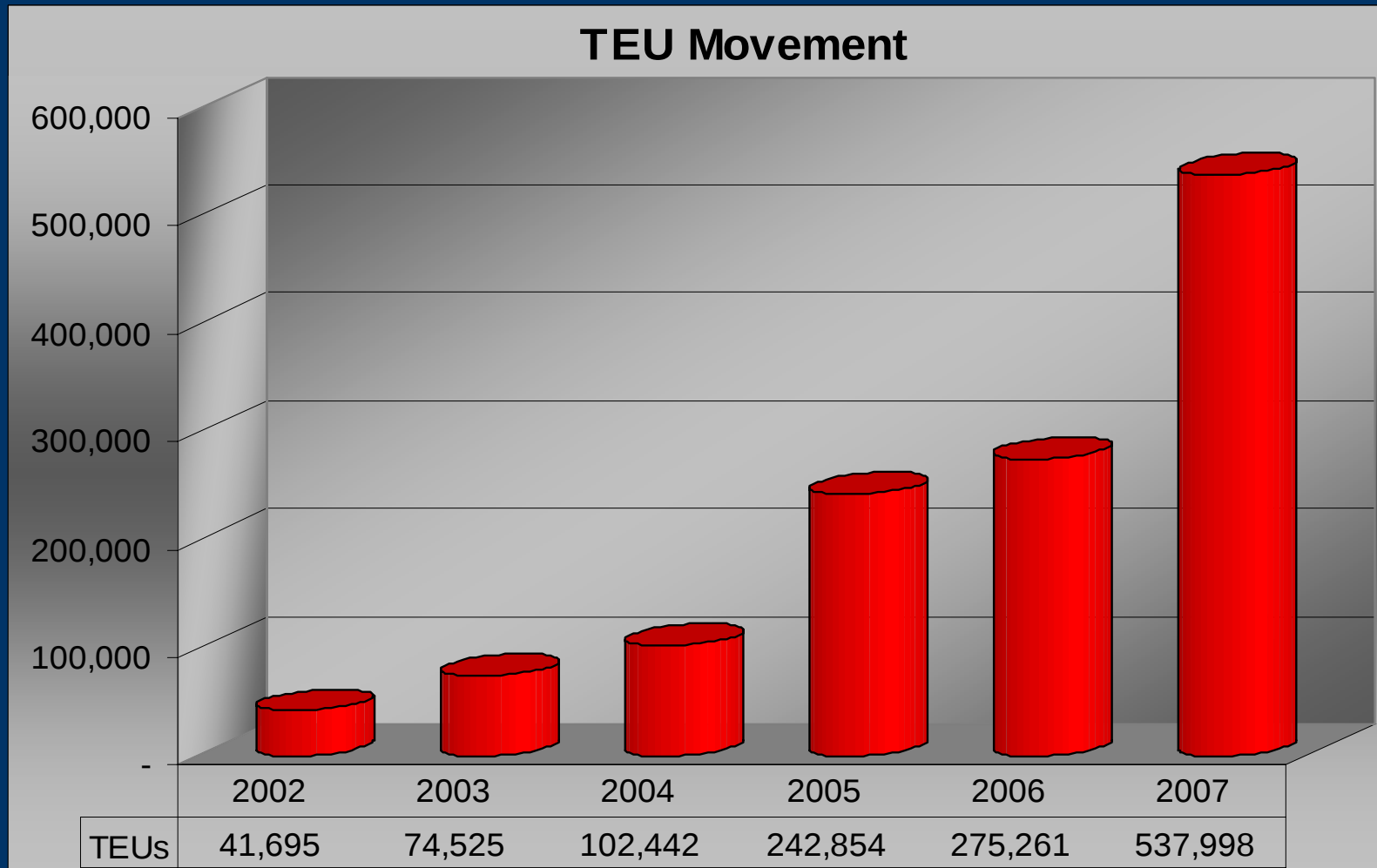
CAPACITY 4M TEU



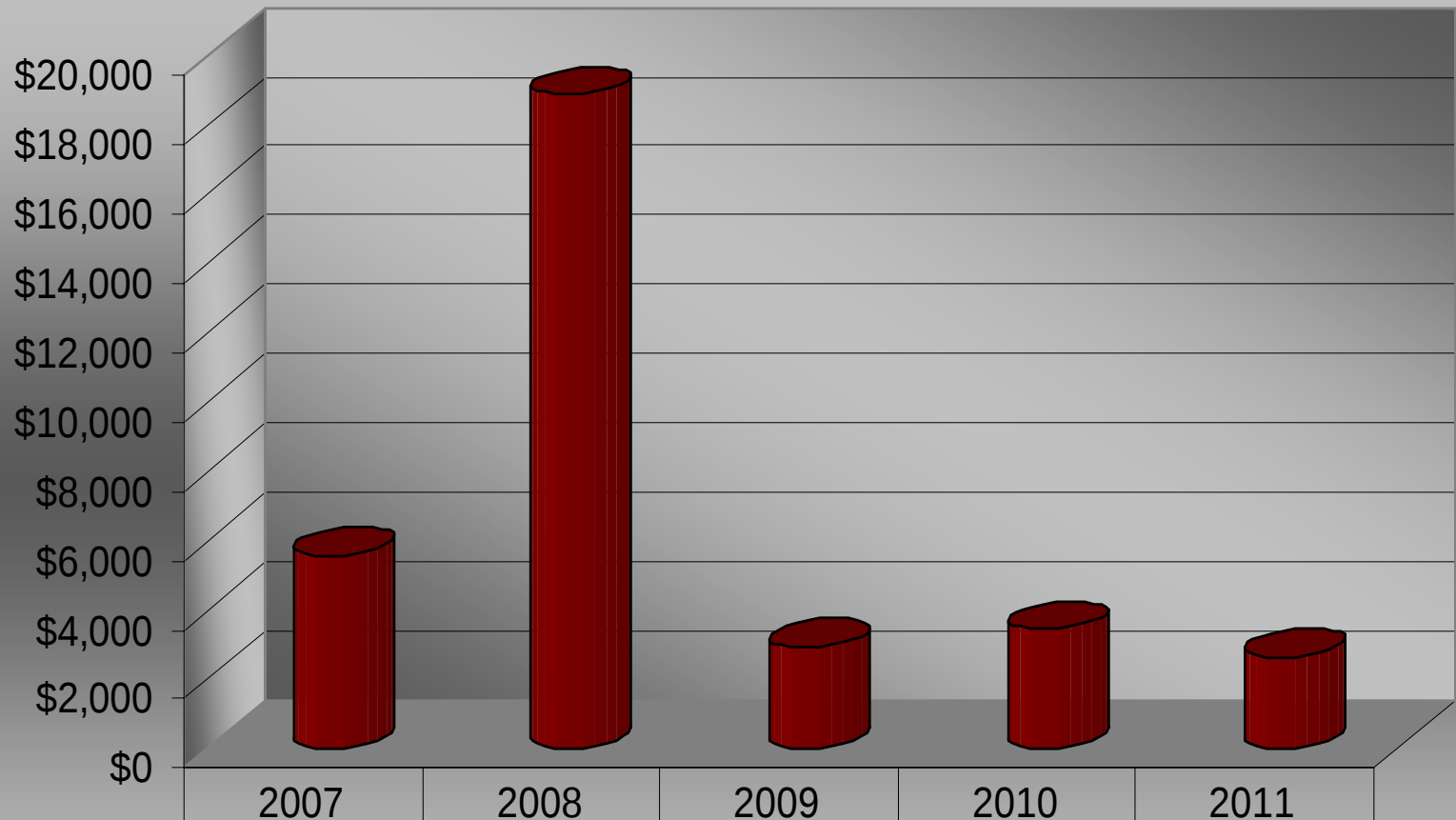
Panama Canal Rail



Panama Canal Railway 5 year Demand



CAPITAL EXPENDITURE PROJECTIONS



■ Projected Capital Expenditures (000s)

\$5,565

\$18,860

\$2,930

\$3,453

\$2,629

MULTIMODAL TRANSPORTATION SYSTEM

