INTEGRACIÓN vs. RESTRICCIÓN:
¿HACIA DÓNDE VA LA INDUSTRIA MARÍTIMO-PORTUARIA DE LA REGIÓN?
The Maersk Line brand includes Safmarine, Seago Line, SeaLand, Mercosul Line, and MCC Transport.
Global merchandise import growth 1970-2016

(Source: World Trade Organization Data 2017)
Global Container Throughput 1979-2016

(Source: Drewry Shipping Consultants)
World Trade Growth Forecast (By Volume)

Seaborne trade is growing faster than Global GDP

Organization for Economic Cooperation and Development industrial production index and indices for world gross domestic product, seaborne trade and merchandise trade, 1975–2015


Note: 1990–100. Indices calculated based on GDP and merchandise trade in dollars and seaborne trade in metric tons.
The global economy relies upon the global shipping fleet for growth...

- **World trade transported by ship:**
  - 10 Billion tons

- **Estimated World Merchandise Trade by value (2016):**
  - $16.9 Trillion USD

- **Total number of merchant ships in service in 2015:**
  - 90,917

- **World seaborne trade (value) moving in containers:**
  - 52%

- **Developing countries represent the largest share of global seaborne trade:**
  - 60% of all goods loaded
  - 58% of all goods unloaded

Global shipping requires a global port network

<table>
<thead>
<tr>
<th>Over 400 liner services:</th>
<th>5,993 vessels call liner trade routes:</th>
<th>Total global container fleet capacity:</th>
</tr>
</thead>
<tbody>
<tr>
<td>10,000 Port calls weekly</td>
<td>5,144 are containerships</td>
<td>20.6 million TEUS</td>
</tr>
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<tr>
<th>355 container vessels on order:</th>
<th>Top 3 Lines: More than two-fifths of the total global container fleet</th>
<th>Top 5 Lines: More than half of the total global container fleet</th>
</tr>
</thead>
<tbody>
<tr>
<td>2.7 million TEUs new capacity</td>
<td>42.8%</td>
<td>58.6%</td>
</tr>
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</table>

(Sources: World Shipping Council 2016; Alphaliner, August 2017)
Long-term attractiveness of the port industry is driven by ongoing globalization, containerization and privatization

**World container port handling demand (TEU million)**

- 10% CAGR from 1990 - 2008
- (9.1%) global volume loss for 2009
- Recovery in 2010 with 14.8% growth
- 4% growth rates 2016-2021

**Fundamental drivers of port demand**

- Global economic growth.
- Increased regional trade (e.g. Intra-Asia).
- Increased containerization of commodities (e.g. grain, reefer).
- Necessity to upgrade existing capacity (e.g. larger vessels, deep draft and larger crane requirements).
- Privatization opportunities.
- Growing consumer demand in developing countries.

(Source: Drewry Shipping Consultants, August 2017)

Projected figures based upon 4% average annual growth 2016-2021 (Drewry).
New larger vessels – raising bar for port operators

World Container Fleet Breakdown by Vessel Capacity
2012 to 2016

Source: Alphaliner February 2016
Port industry needs to respond

Demand on land space

Inland infrastructure and connectivity

Sustainability - Safety and Environment

Itajai, Brazil

Rotterdam, Netherlands
The effects of containerization on port design and operations illustrated by a comparison of port operations and activities separated by several decades.
The evolution of crane sizes...
...and the evolution of crane concepts

From bigger cranes ...  ... to smarter cranes
Global Trade Expansion Requires Infrastructure

International seaborne trade, selected years (Millions of tons loaded)

Demands on Land Space
Mature Markets: Expanding Capacity

Source: Port of Rotterdam
Underserved, Emerging Markets: New Construction
Emerging and Developing Markets’ Higher Growth

GDP Growth Rates (Constant Prices)

Source: IMF Data October 2016
Latin America Lags, India Leads, in Economic Growth

2017 GDP Growth Projection Comparisons

Source: World Bank: January 2017
Thank you