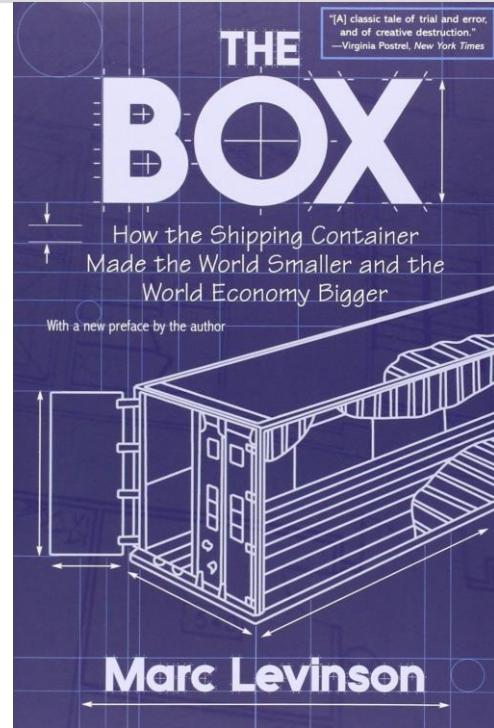




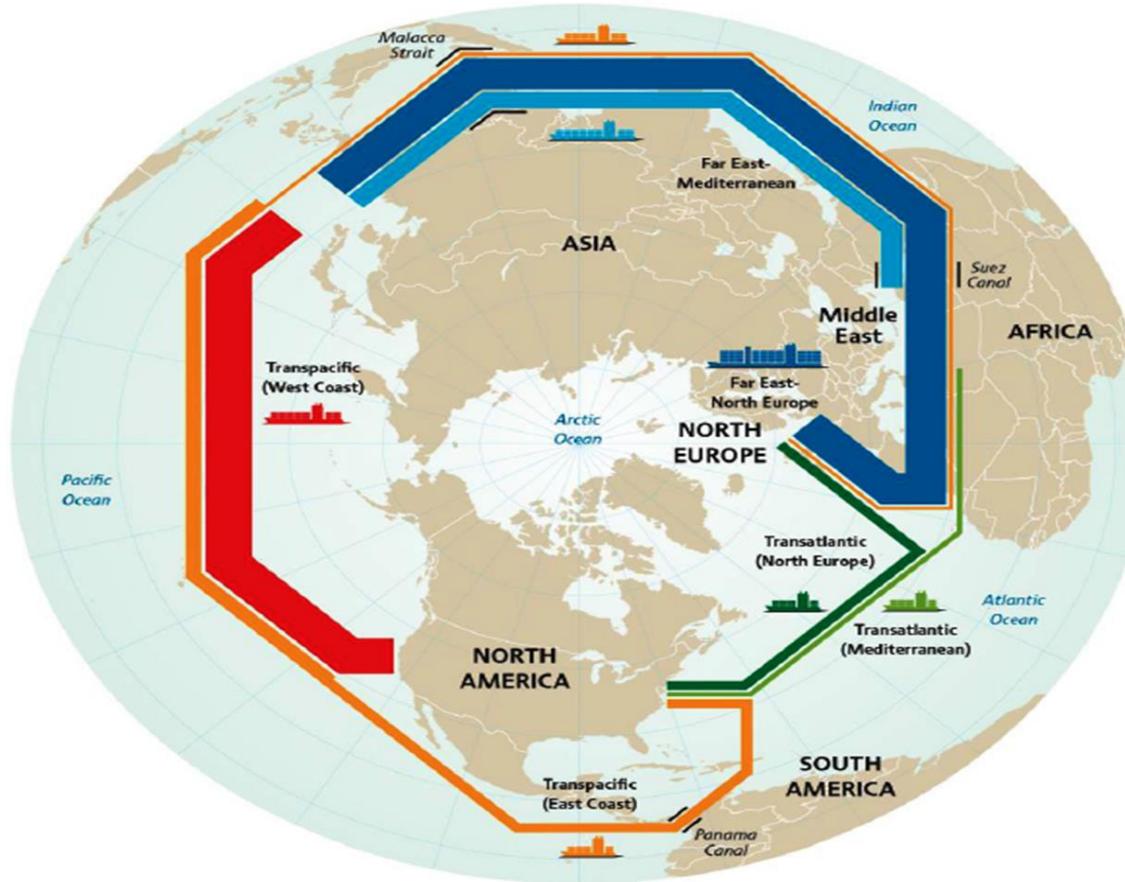
# Transporte Marítimo

## Panorama actual y contexto geo-económico

# ¿Quién es el protagonista de hoy?



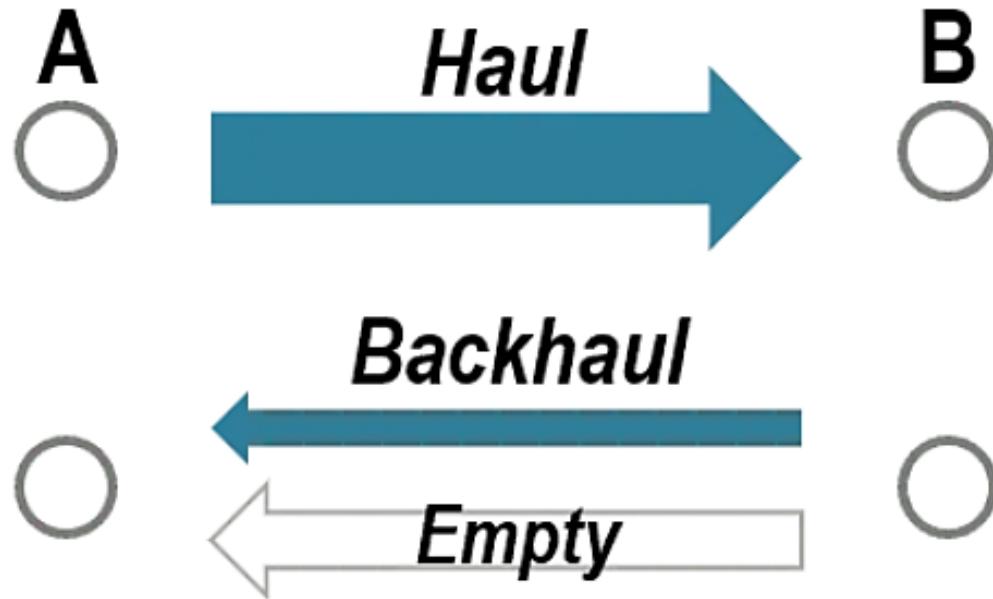
# Entender el desbalance



# El FOMO ¿reventó la industria?



## Imbalanced Flows



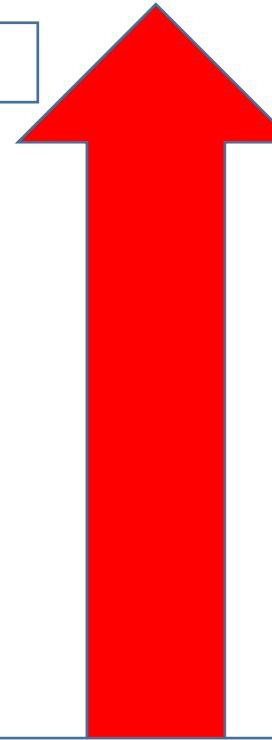


# Cosas que están pasando...

¿Por qué le pasa esto a una tarifa en la ruta NAWC?



Enero 3  
USD 450/FEU

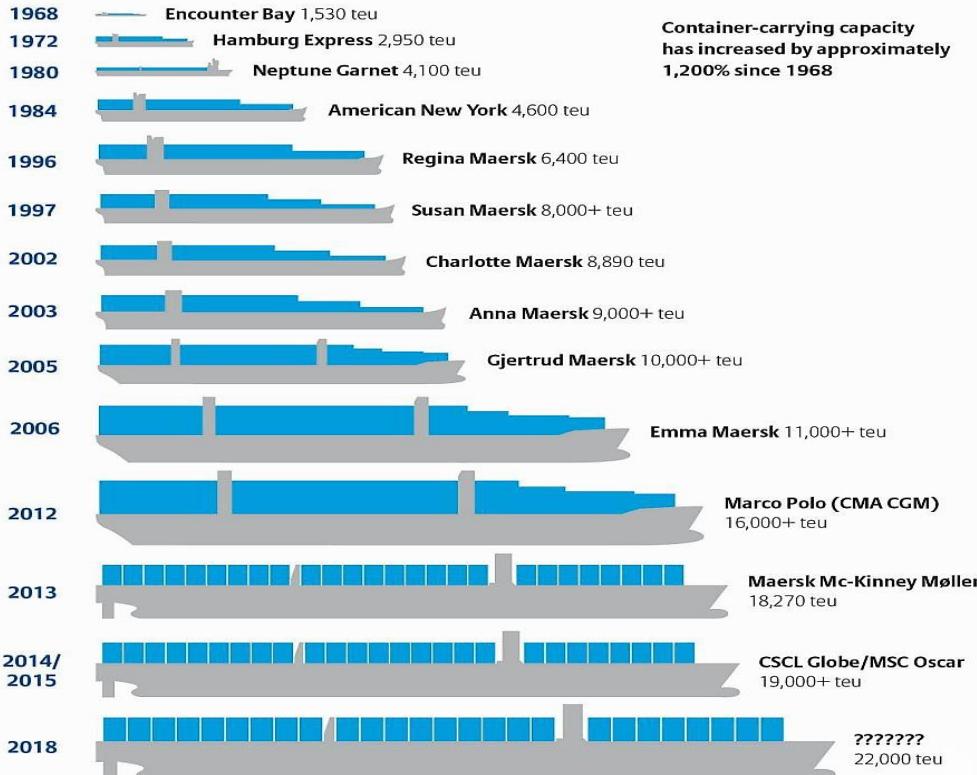


Junio 3  
USD 2050/FEU

5 ×

# El crecimiento astronómico de la flota

## 50 years of Container Ship Growth



Graphic: Allianz Global Corporate & Specialty.

Approximate ship capacity data: Container-transportation.com



# Alta Concentración

TOP  
100

Alphaliner TOP 100 / 10 Feb 2021



Global  
figures



**6,221** active ships  
including 5,331 fully cellular



**24,348,103** TEU  
23,892,506 TEU fully cellular

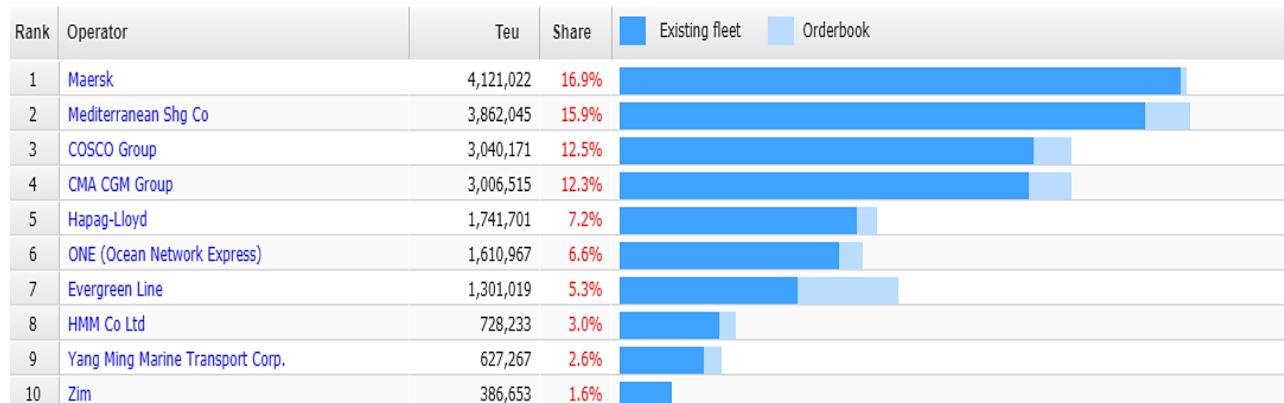


**293,962,803** DWT

Figures are consolidated

Regional Trades  
weekly capacities

Trans-Atlantic **141,863** TEU  
Trans-Pacific **550,061** TEU  
Feast-Europe **419,123** TEU



**3 alianzas**  
**10 navieras**  
**Cerca del 85%**

**ALPHALINER**



COMPRAS  
INTELIGENTES

S.A.S.

# ¡El resumen!

Q2 1996    Q1 1998    Q4 2001    Q4 2005    Q4 2009    Q1 2012    Q2 2015    Q2 2017    Q1 2020

**GLOBAL ALLIANCE**

APL  
MOL  
Nedlloyd  
OOCL  
MISC

**NWA**

APL/NOL

**NWA**

APL/NOL

**NWA**

APL/NOL

**NWA**

APL/NOL

**G6 ALLIANCE**

APL/NOL

**G6 ALLIANCE**

MOL

**THE ALLIANCE**

Hanjin

**THE ALLIANCE**

ONE

**GRAND ALLIANCE**

Hapag-Lloyd  
NYK Line  
OOCL  
NOL  
P&OCL

**GRAND ALLIANCE II**

Hapag-Lloyd

**GRAND ALLIANCE II**

Hapag-Lloyd

**GRAND ALLIANCE III**

Hapag-Lloyd

**GRAND ALLIANCE IV**

Hapag-Lloyd

**CKYH**

NYK Line

OOCL

MISC

**CYKHE**

Hanjin

K-Line

Yang Ming

COSCO

**OCEAN ALLIANCE**

Hanjin

K-Line

Yang Ming

COSCO

**OCEAN ALLIANCE**

CMA CGM

COSCOCS

OOCL

Evergreen

**UNITED ALLIANCE**

Hanjin

Cho Yang

UASC

**CKYH**

Hanjin

K-Line

Yang Ming

COSCO

**CKYH**

Hanjin

K-Line

Yang Ming

COSCO

**MSC/CMA CGM**

MSC

Maersk Line

**CMA CGM**

MSC

Maersk Line

**2M**

MSC

Maersk Line

**2M**

MSC

Maersk Line (ex. Hamburg Süd)

**CY ALLIANCE**

K-Line

Yang Ming

COSCO

Maersk

Sea-Land

Maersk

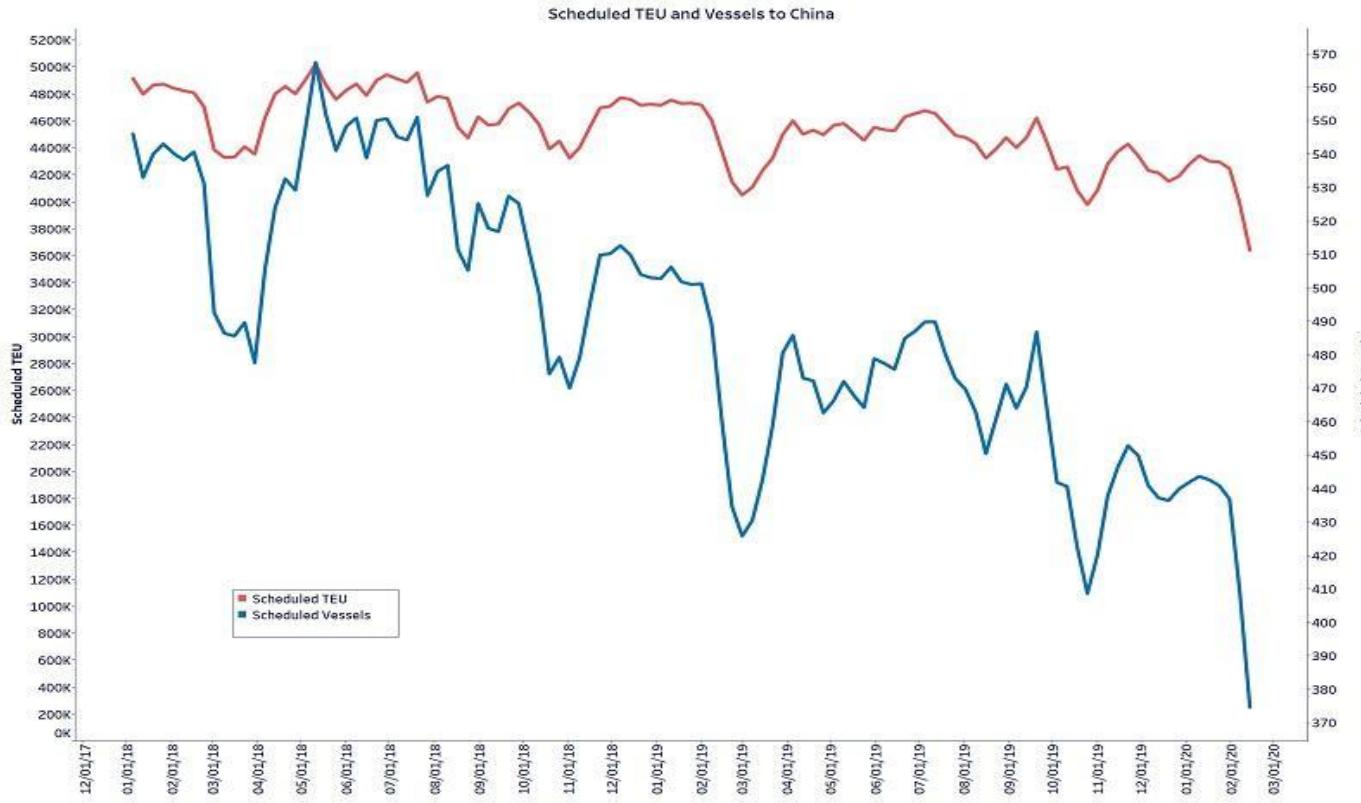
Sea-Land

Since early 2020: slot charter with Hapag-Lloyd

on FE-NE trade



# Transporte Marítimo (situación actual)



The maritime Hub



# Transporte Marítimo (situación actual)

**ITF advierte que gente de mar no seguirá trabajando caducado el tiempo de recambio de tripulación**

16 Junio, 2020

¿Encontraste un error? Avisanos 

Por Redacción PortalPortuario.cl

@PortalPortuario

La Federación Internacional de Trabajadores del Transporte (ITF) advirtió a los gobiernos y a la industria marítima que no seguirán aceptando que la gente de mar siga trabajando terminados los plazos para el recambio de tripulación.

"Si ha terminado su contrato, tiene derecho a ser repatriado. Si esto no es posible, entonces permanecería a bordo como pasajero. Las consecuencias podrían ser que el barco no pueda navegar si el nivel de dotación es inadecuado, pero esa no es responsabilidad de la gente de mar", indicó la ITF en un comunicado.

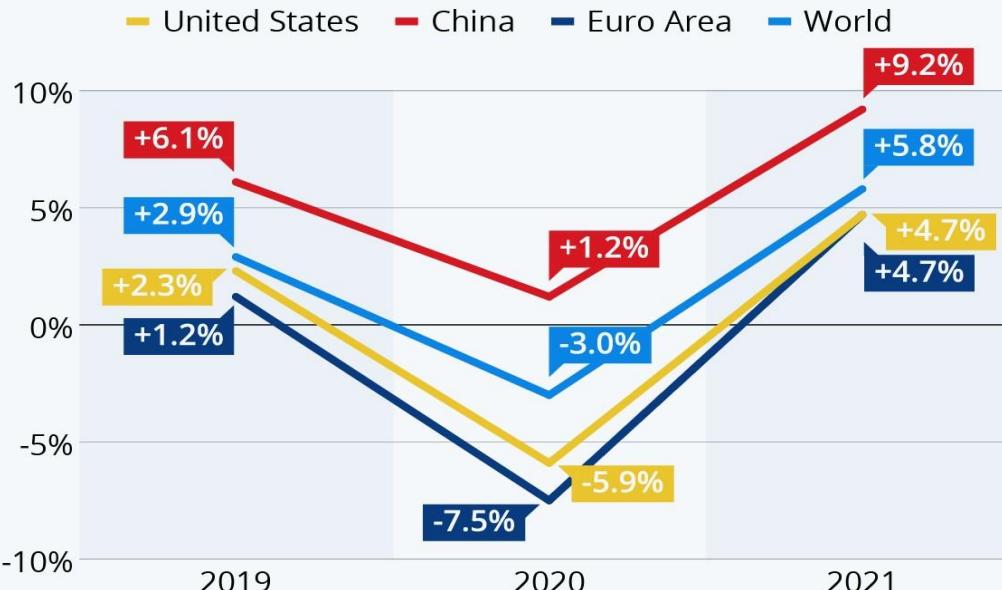
"Estamos claros: si un marino quiere salir de un barco, entonces la ITF, nuestros sindicatos afiliados y la inspección de la ITF harán todo lo posible para ayudarlos. Sabemos que necesita bajar de estos barcos, y lo ayudaremos a hacerlo donde podamos", añadió el organismo.



# Corrección a las previsiones

## Hoping for a V-Shaped Recovery

GDP growth forecast for selected economies  
(as of April 2020)



Source: IMF

FMI  
Decrecimiento 9,2% - 2020  
Crecimiento 7,2% - 2021

¿Recuperación débil ?

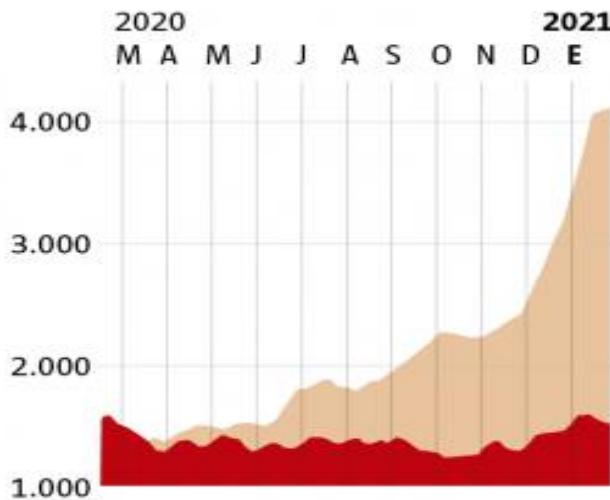


# Geo-economía hoy...

## ÍNDICE GLOBAL DEL PRECIO DE LOS CONTENEDORES

Índice Global Freight, precio en dólares

● 2021 ● 2020

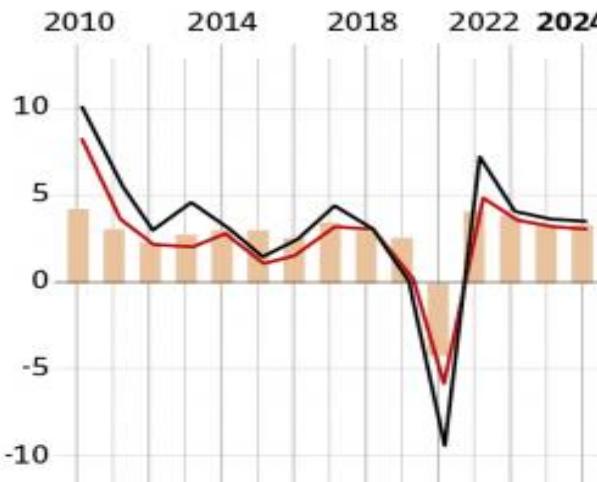


FUENTES: Freightos e IHS

## ECONOMÍA GLOBAL Y COMERCIO MARÍTIMO

Variación anual en porcentaje

- PIB ● Producción industrial
- Transporte marítimo (en TEU)

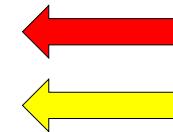


Anna Monell / LA VANGUARDIA

# Geo-economía hoy...

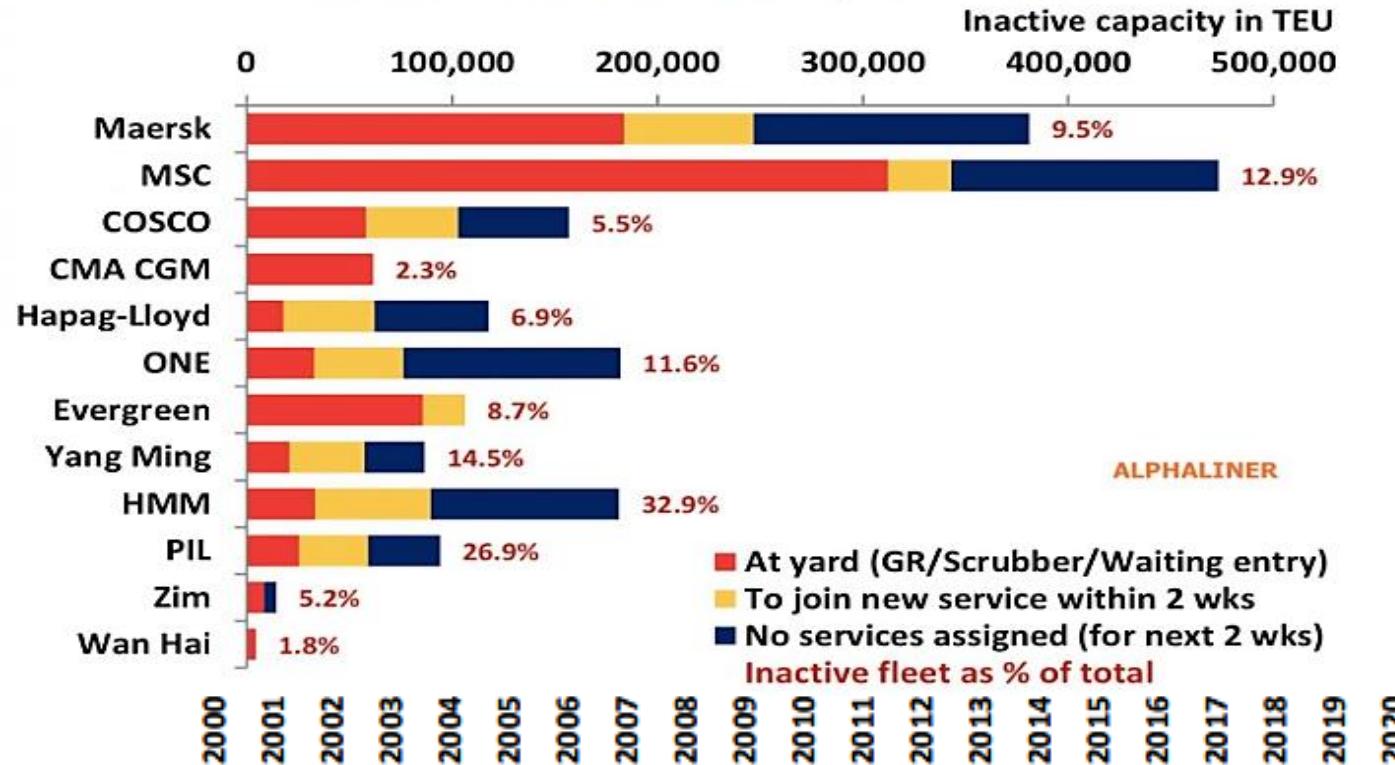
RAÚL TÁRREGA Valencia | 21 enero 2021 - Actualizado a las 17:43h

| Route                  | 07-Jan-21 | 14-Jan-21 | 21-Jan-21 | Weekly change (%)                       | Annual change (%)                         |
|------------------------|-----------|-----------|-----------|---|---|
| Composite Index        | \$5,221   | \$5,238   | \$5,340   | 2% <span style="color: green;">▲</span> | 198% <span style="color: green;">▲</span> |
| Shanghai - Rotterdam   | \$8,882   | \$8,815   | \$9,066   | 3% <span style="color: green;">▲</span> | 296% <span style="color: green;">▲</span> |
| Rotterdam - Shanghai   | \$1,357   | \$1,357   | \$1,409   | 4% <span style="color: green;">▲</span> | 110% <span style="color: green;">▲</span> |
| Shanghai - Genoa       | \$8,380   | \$8,412   | \$8,792   | 5% <span style="color: green;">▲</span> | 230% <span style="color: green;">▲</span> |
| Shanghai - Los Angeles | \$4,194   | \$4,194   | \$4,178   | 0%                                      | 153% <span style="color: green;">▲</span> |
| Los Angeles - Shanghai | \$518     | \$518     | \$530     | 2% <span style="color: green;">▲</span> | 28% <span style="color: green;">▲</span>  |
| Shanghai - New York    | \$6,385   | \$6,748   | \$6,517   | -3% <span style="color: red;">▼</span>  | 132% <span style="color: green;">▲</span> |
| New York - Rotterdam   | \$690     | \$663     | \$646     | -3% <span style="color: red;">▼</span>  | 24% <span style="color: green;">▲</span>  |
| Rotterdam - New York   | \$2,185   | \$2,116   | \$2,283   | 8% <span style="color: green;">▲</span> | -5% <span style="color: red;">▼</span>    |



# Inactividad de la flota

Top 12 Carriers : Inactive capacity breakdown as at 1 June 2020



# La sangre de la industria

## World Bunker Prices

Home ▶ Bunker Prices

VLSFO      MGO      IFO380      IFO180



|                             | Price \$/mt | Change | High   | Low    | Spread |
|-----------------------------|-------------|--------|--------|--------|--------|
| Global 20 Ports Average     | 492.50 ▲    | +4.00  | 492.50 | 492.50 | 0.00   |
| Global 4 Ports Average      | 477.00 ▲    | +3.00  | 477.00 | 477.00 | 0.00   |
| Global Average Bunker Price | 497.50 ▲    | +3.00  | 497.50 | 497.50 | 0.00   |
| Americas Average            | 517.00 ▼    | -0.50  | 517.00 | 517.00 | 0.00   |
| APAC Average                | 509.50 ▲    | +5.50  | 509.50 | 509.50 | 0.00   |
| EMEA Average                | 475.00 ▲    | +2.50  | 475.00 | 475.00 | 0.00   |
| Singapore                   | 502.00 ▲    | +1.00  | 510.00 | 496.50 | 13.50  |
| Rotterdam                   | 460.50 ▲    | +1.50  | 486.00 | 445.00 | 41.00  |





'Without shipping, half the world would starve and the other half would freeze'.  
Efthimios Mitropoulos –  
Ex IMO Gral Secretary.



Ricardo A. Moreno R.



# CORPORATE PRESENTATION

Group CMA CGM



# CMA CGM Group: key figures



|   |  |  |
|---|--|--|
| <b>285</b><br>shipping lines                                | <b>Over 110,000</b><br>staff members worldwide | <b>2.7 million*</b><br>TEU of fleet capacity |
| <b>Over 420</b><br>ports of call<br>in 160 countries        | <b>21.6 million*</b><br>TEU transported        | <b>45</b><br>terminals<br>under management   |
| <b>755</b><br>offices worldwide<br><b>750</b><br>warehouses | <b>538**</b><br>vessels                        | <b>USD 30.3 bn*</b><br>of revenue            |

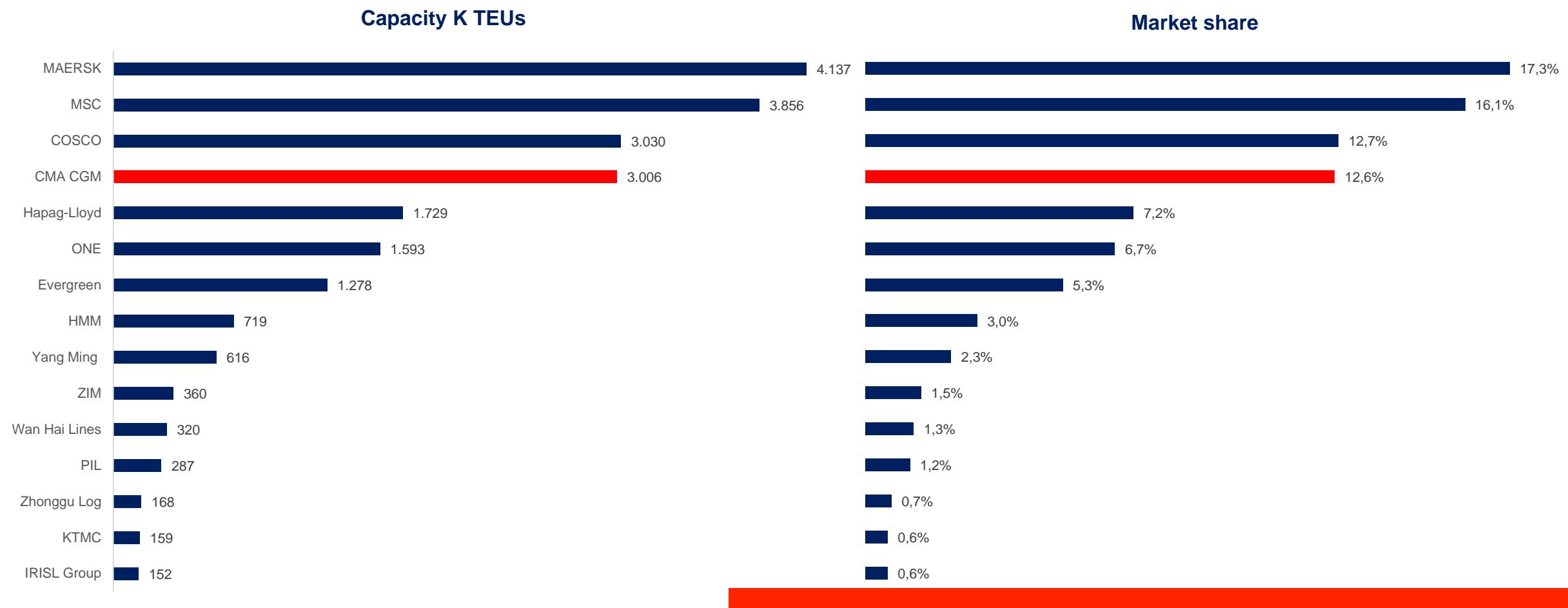
\* 2019 figures

\*\* Q3 2020



# CMA CGM: A global leader by capacity and market share

Top 15 shipping companies



Source: Alphaliner, January, 2021

# Environment: a leader in the energy transition



- **CMA CGM will not use the Northern Sea Route**, a forward-looking, socially responsible decision to protect biodiversity in the Arctic region and to preserve its role in regulating global climate patterns.
- **CMA CGM will give priority to liquefied natural gas (LNG) to power its future ships** while continuing to conduct research on other energy sources.
- The Group was the world's first container shipping company **to successfully test biofuel made with 20% recycled vegetable oil and forest residues**. CMA CGM also signed an agreement with Shell to supply its fleet with **tens of thousands of tons of marine biofuel**. This unprecedented amount for the industry, will enable the Group's ships to travel nearly **1 million kilometers**, the equivalent of more than 80 round trips between Rotterdam and New York.
- The CMA CGM Group is joining forces with **Energy Observer**, the first hydrogen-powered vessel to embark on a round-the-world voyage, to experiment, test and develop energy solutions based on hydrogen, solar, tidal and wind power.
- Rodolphe Saadé initiated, alongside Emmanuel Macron, French President, an international coalition in favor of the energy transition with the priority of working towards the emergence of a more competitive and less carbon-intensive energy in transport.
- Between 2005 and 2015, **the Group has already reduced its CO2 emissions per container transported by 50%**, and its target is to reduce them by another 30% by 2025.
- For the fifth consecutive year, **CMA CGM received the "Gold Recognition Level" from EcoVadis**.



# My CMA CGM, all your shipping needs just one click away



CMA CGM eSolutions transforms and facilitates the customer experience by making it 100% digital with a wide range of products and services covering all aspects of the transport cycle:

- Product catalog
- Transport execution: bookings, shipping instructions & VGM documents
- eDocumentation: dashboard provides access to all export & import documents, 24/7
- Extended visibility: a unique dashboard, container tracking tool and notification system
- Finance module: invoice tracking, online payment

Thanks for your attention

---





Hapag-Lloyd

# PERSPECTIVAS DEL TRANSPORTE MARÍTIMO

## SHIPPINGWATCH

Container lines could lose upwards of USD 23 billion in the corona crisis

Container shipping companies face massive billion dollar losses in 2020 if they fail to prevent a collapse in rates, projects Sea-Intelligence. More than 200 sailings have been voided.



| Photo: HHM / Michael Lindner

BY KATRINE GRØNVALD RAUN

Published: 06.04.20 at 09:49

## SHIPPINGWATCH

Container lines headed for highest profit in eight years

The world's top container lines are on track for a combined double-digit billion-dollar profit on their operations in 2020, which is the highest level in eight years, projects Sea-Intelligence.

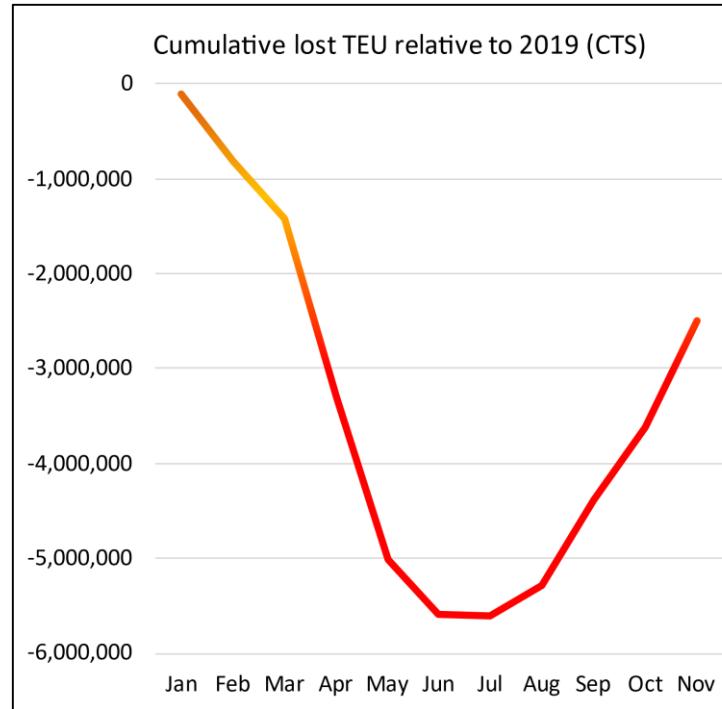
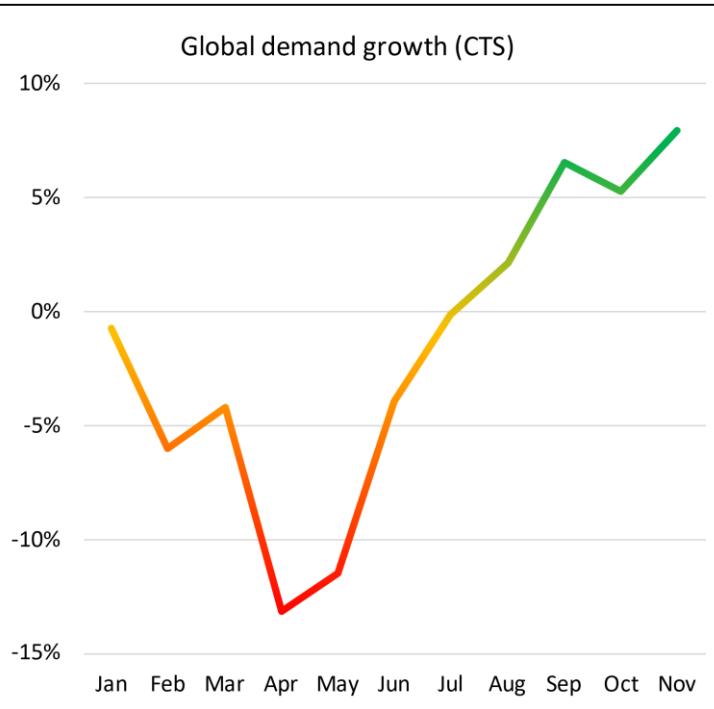


| Photo: Roslan Rahman/AFP/Ritzau Scanpix

BY SØREN PICO

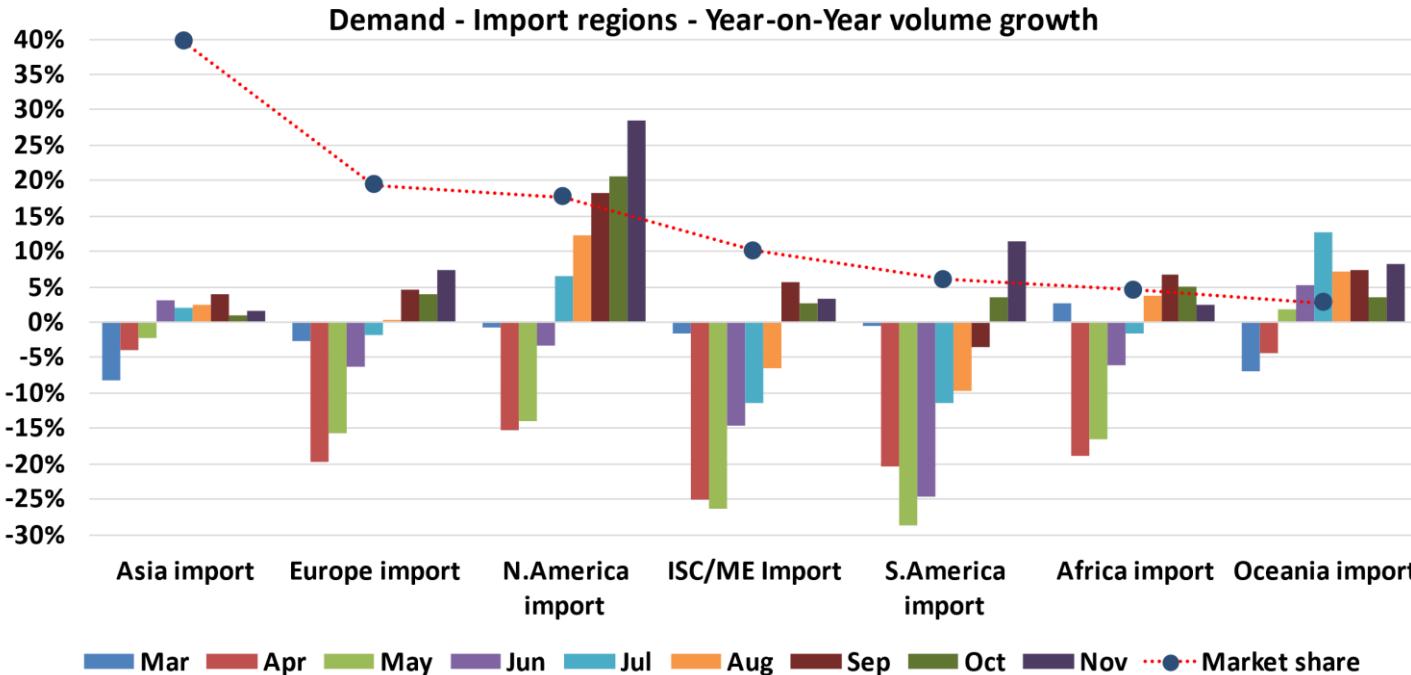
Published: 23.11.20 at 09:38

# Abrupta caída y recuperación en la demanda de transporte



Source: Sea-Intelligence

# Recuperación liderada por EEUU, Latam aún en déficit



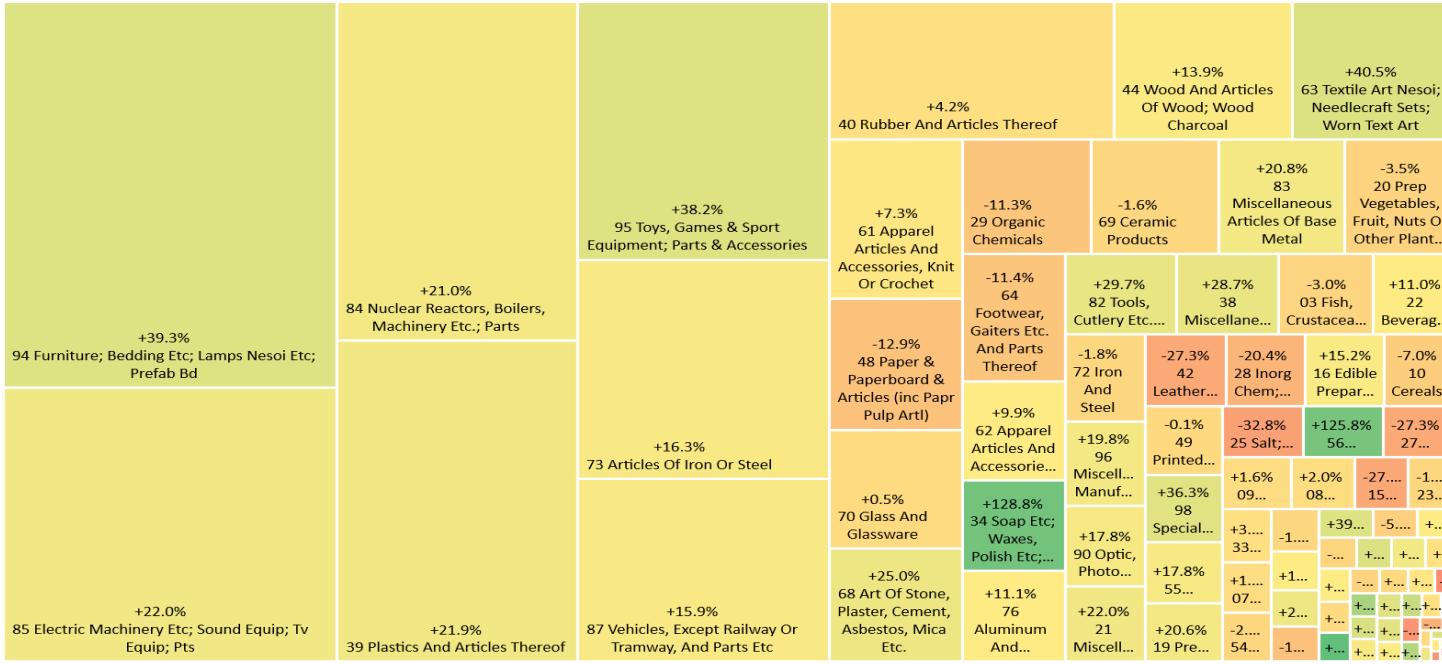
Colombia:  
Expo: +5%  
Impo: -12%

Source: Sea-Intelligence



# Cambio radical en el patrón de consumo

Transpacific Imports Sep-Nov 2020 - HS2 Level - Share of Imports by weight & Y/Y growth - 26.8M MTON MOVED

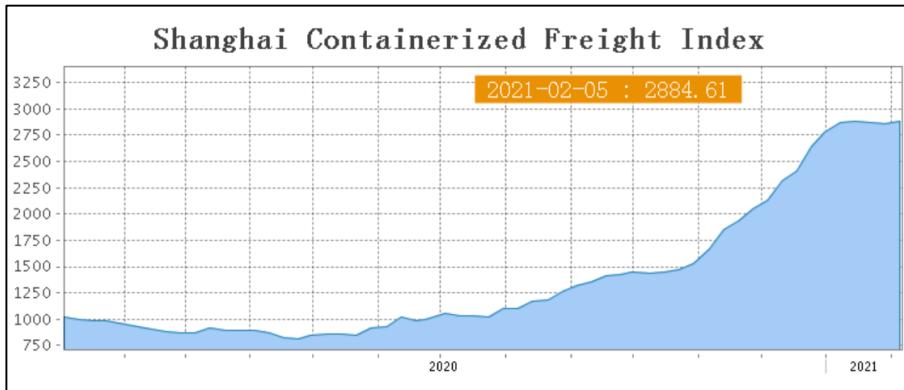
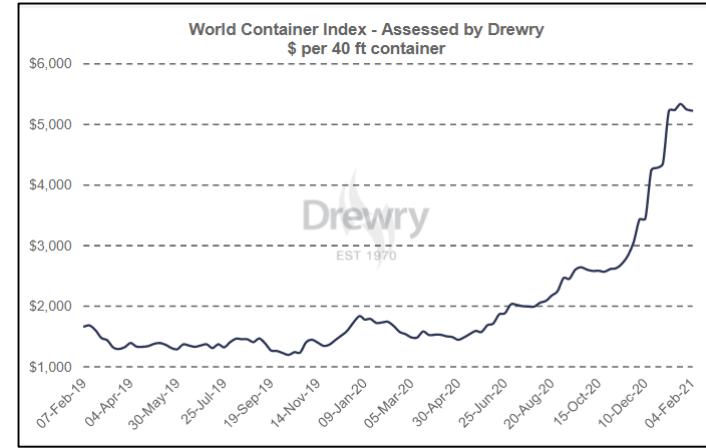
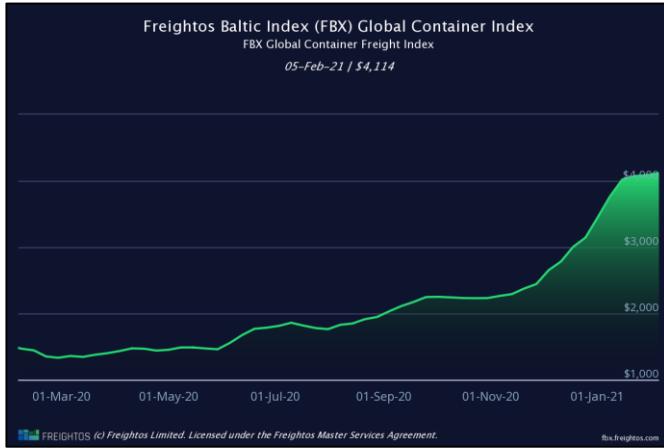


Source: Sea-Intelligence



Hapag-Lloyd

# Evolución de fletes (SPOT)

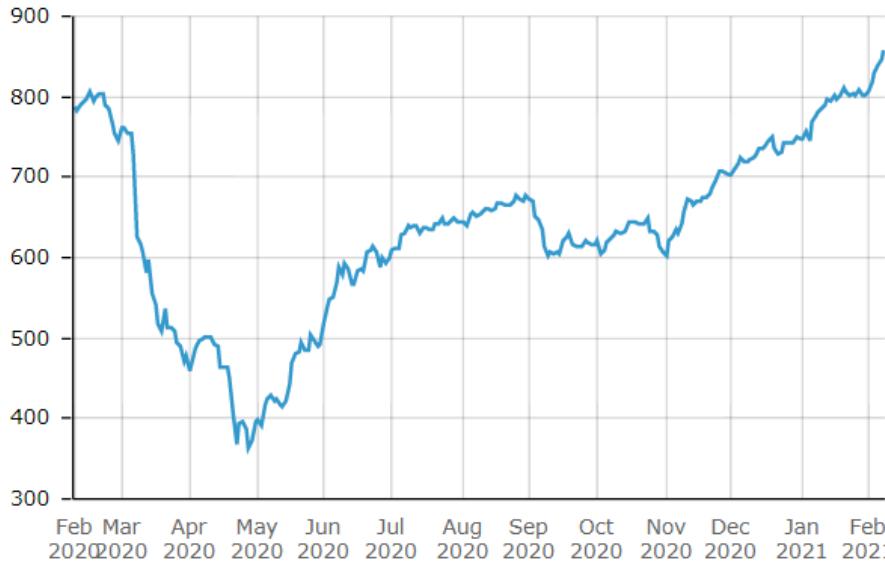


**Source:** Freightos, Drewry, SCFI



# Evolución del bunker & Regulación IMO2020

## BUNKERWORLD



3.5%  
or less



09/2018

0.5%  
or less

01/2020

LOW SULPHUR CONTENT



Source: Bunkerworld Index



# Principales Consecuencias



## Falta de Contenedores

- Viajes ad-hoc para reposicionar vacíos.
- Baja en producción debido al Covid.
- Reemplazo de unidades donde es posible (NORs, 20'/40').
- Ajustes en plazos de uso, priorización de negocios.



## Capacidad Insuficiente

- Reintegración de toda la flota disponible.
- Extensión de la vida útil.
- Movilización de capacidad a tráficos de mayor demanda.
- Adecuación de naves multipropósito.



## Congestión

- Congestión en puertos incrementa los retrasos en itinerarios.
- Falta de personal en terminales y transporte terrestre por contagios Covid-19.
- Cambios de tripulación siguen siendo un problema mayor.



## Acciones

- Cooperación
- Planificación
- Transparencia
- Digitalización
- Flexibilidad
- Eficiencia

# Oportunidades

# ¡Muchas gracias!



Contacto:  
Ernesto.Aramburu@hlag.com



@AnaldexColombia



ANALDEX



Analdex Colombia



AnaldexColombia

# Hapag-Lloyd Web, Navigator y Mobile App

Fácil. En cualquier momento. En cualquier Lugar.

## Hapag-Lloyd Navigator: Everything at a glance.



[www.hapag-lloyd.com/en/landingpage/hapag-lloyd-navigator.html](http://www.hapag-lloyd.com/en/landingpage/hapag-lloyd-navigator.html)

### Your benefits



#### More transparency

View all your shipment information on one single screen.



#### 24/7 live data

Check the live status of your shipments and bookings at any time.



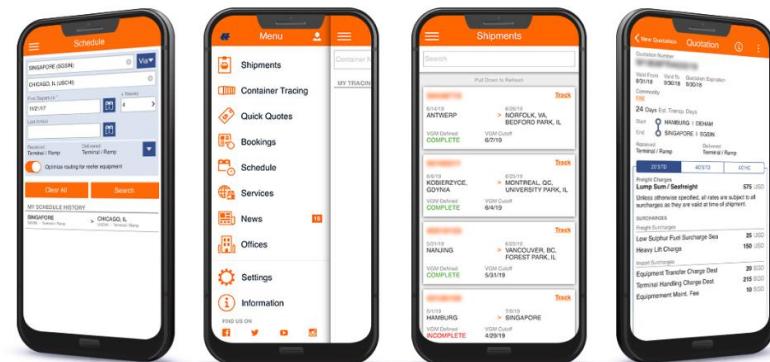
#### Important documents

Have all your important shipment-related documents in one place.



#### Mobile availability

Keep track of your shipments on the go with your mobile device.



[https://www.hapag-lloyd.com/en/products/e-business/mobile.html](http://www.hapag-lloyd.com/en/products/e-business/mobile.html)

App Store



Google Play

