1er CONGRESO INTEGRADO

ZONAS FRANCAS Y PUERTOS

PLATAFORMAS LOGÍSTICAS Y LA 4ª REVOLUCIÓN INDUSTRIAL

ANDI | MÁS PAÍS

Hamburg Sud Colombia y Ecuador

La Geopolitica y las Navieras

Liborio Cuellar, Cartagena, 17 May 2018

HAMBURG SÜD

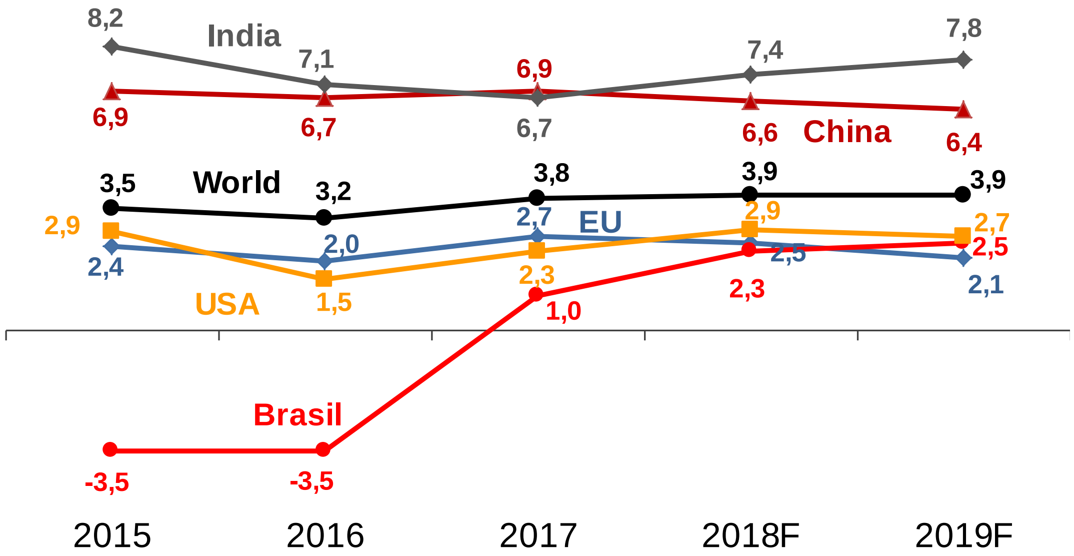
La Geopolítica y las Navieras

- La Relación entre las Navieras y la Geopolítica: El estado de la Industria Marítima hoy.
- La consecuencia de la Geopolítica y las Navieras: La Industria Marítima de mañana.
- El Impacto de la Geopolítica y las Navieras en el flujo de Comercio en Colombia


HAMBURG SÜD
SNV-161

Development of GDP Growth Projections
2015 – 2019F (IMF)

HAMBURG SÜD

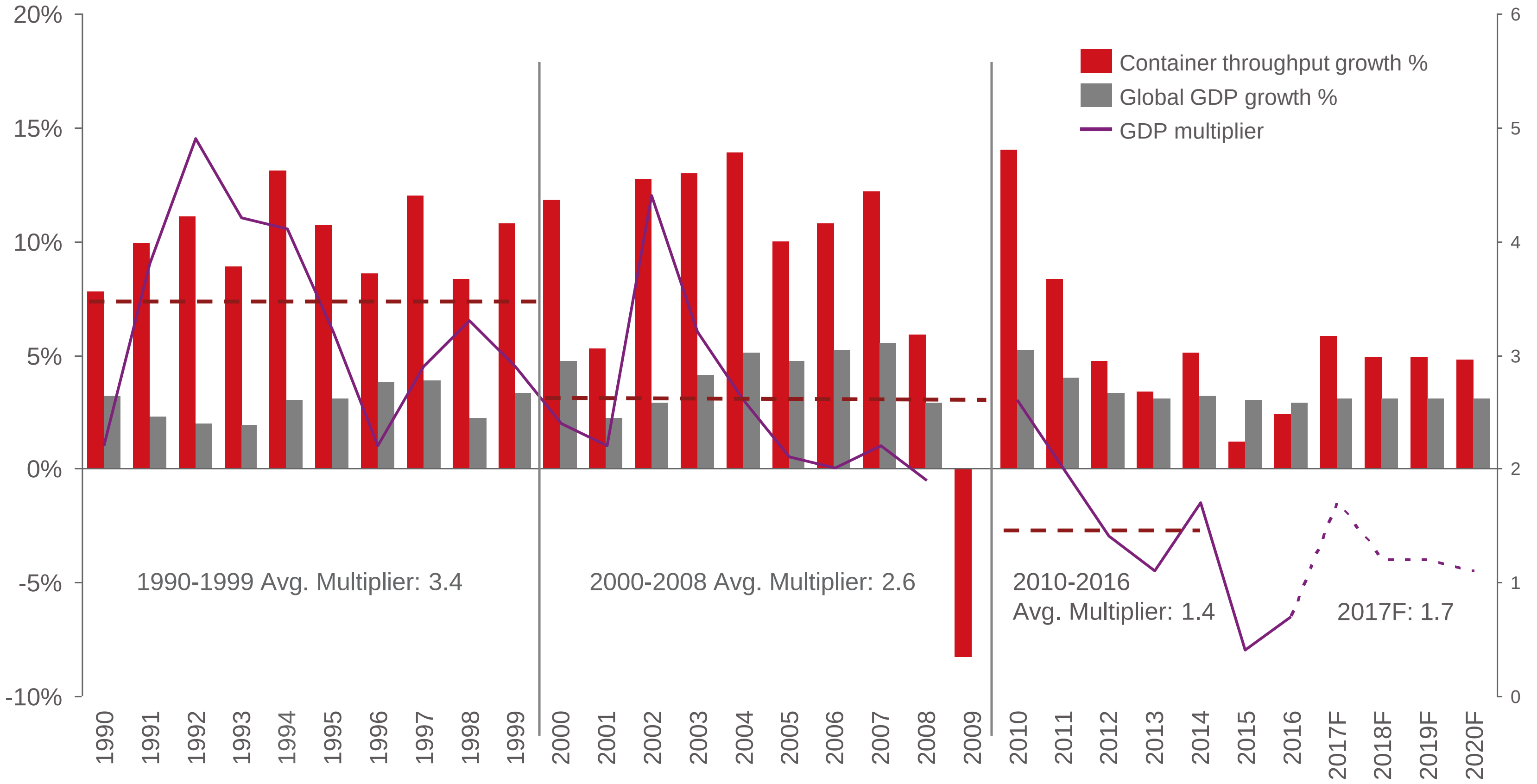


	2015	2016	2017	2018F	2019F
Ø World trade volume	2,7	2,3	4,9	5,1	4,7

Source: International Monetary Fund (IMF), World Economic Outlook April 2018

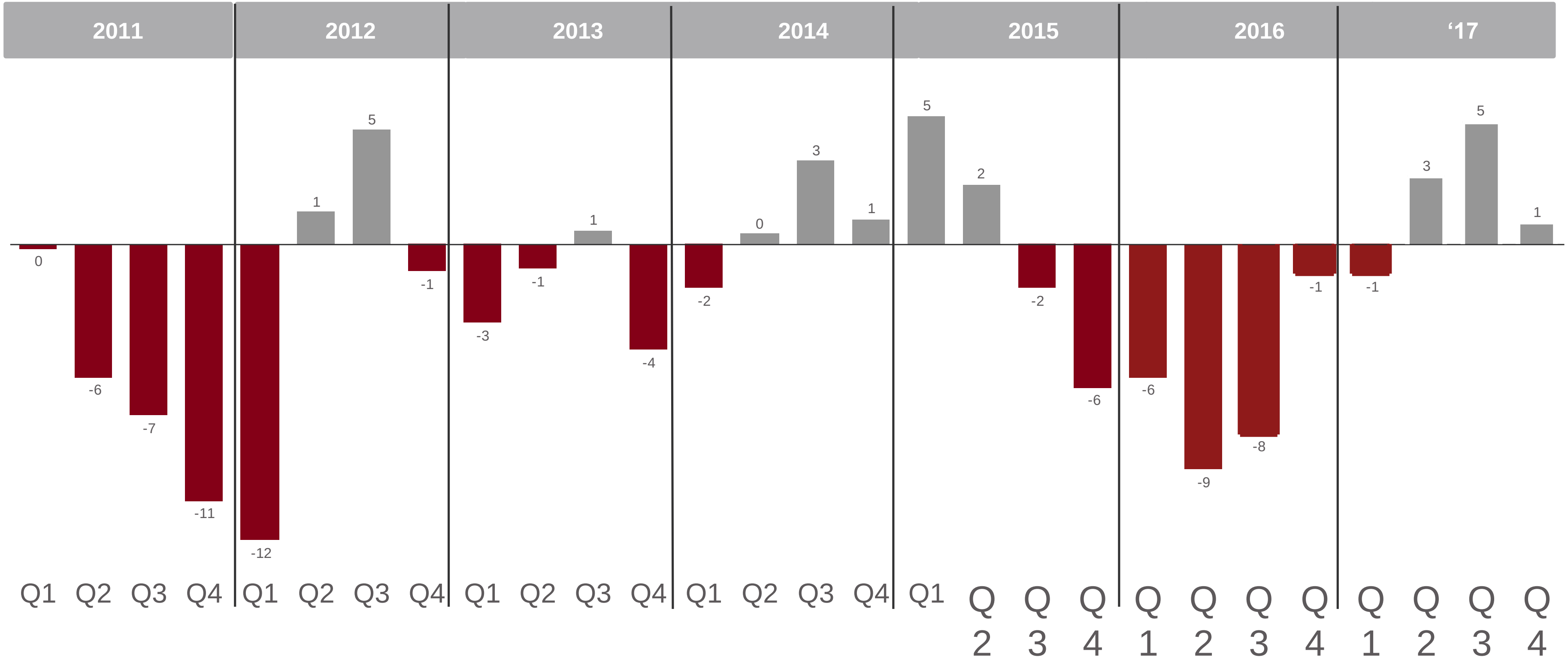
Global Container Throughput vs. GDP Growth (TEU-to-GDP Multiplier)

HAMBURG SÜD



Source: Alphaliner Newsletter No. 42 – 2017

Average operating margin Container Carrier* 2011-2017

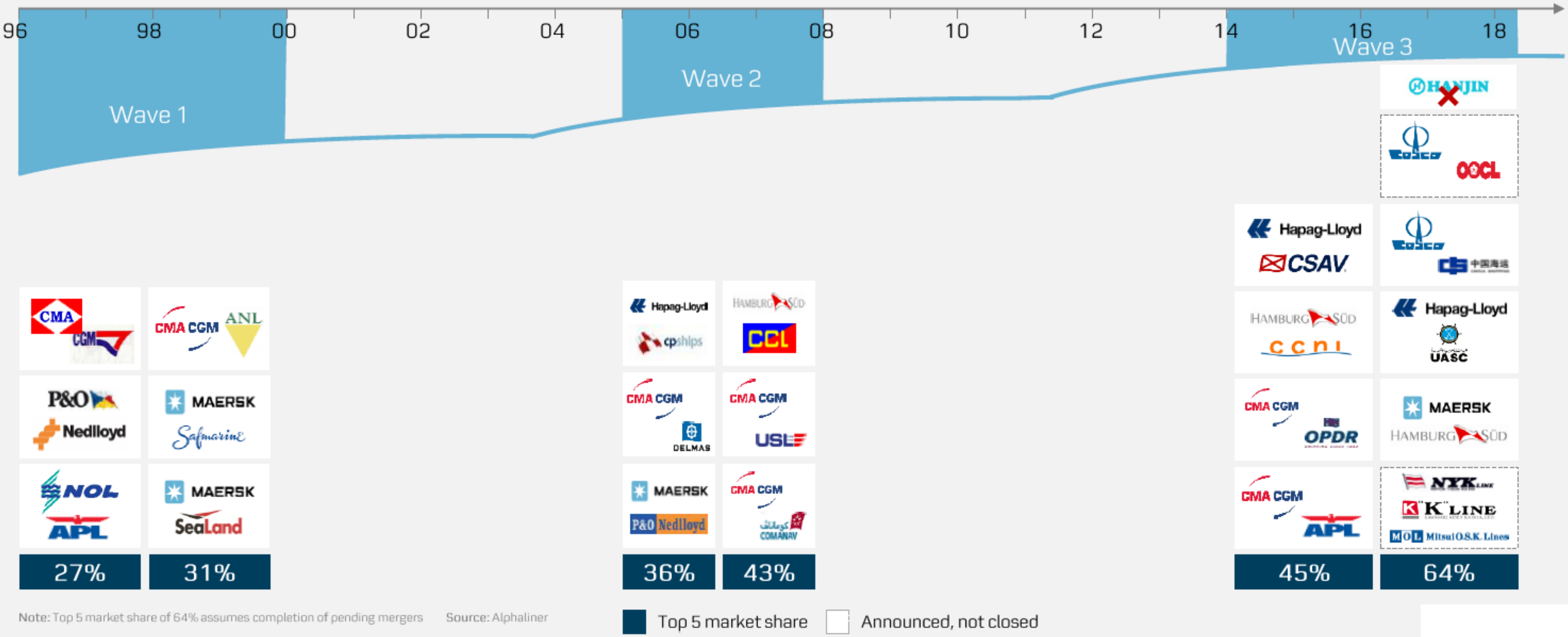


*Average of: CMA CGM (incl. APL to 2Q 2016), CSCL (until 1Q 2016), EMC, Hanjin (until Q2 2016), Hapag-Lloyd (incl. CSAV until 2014), HMM, KL, Maersk, MOL, NYK, WHL, YML, ZIM

Source: AXS Alphaliner Newsletter No 14, 2018; Annual Reports

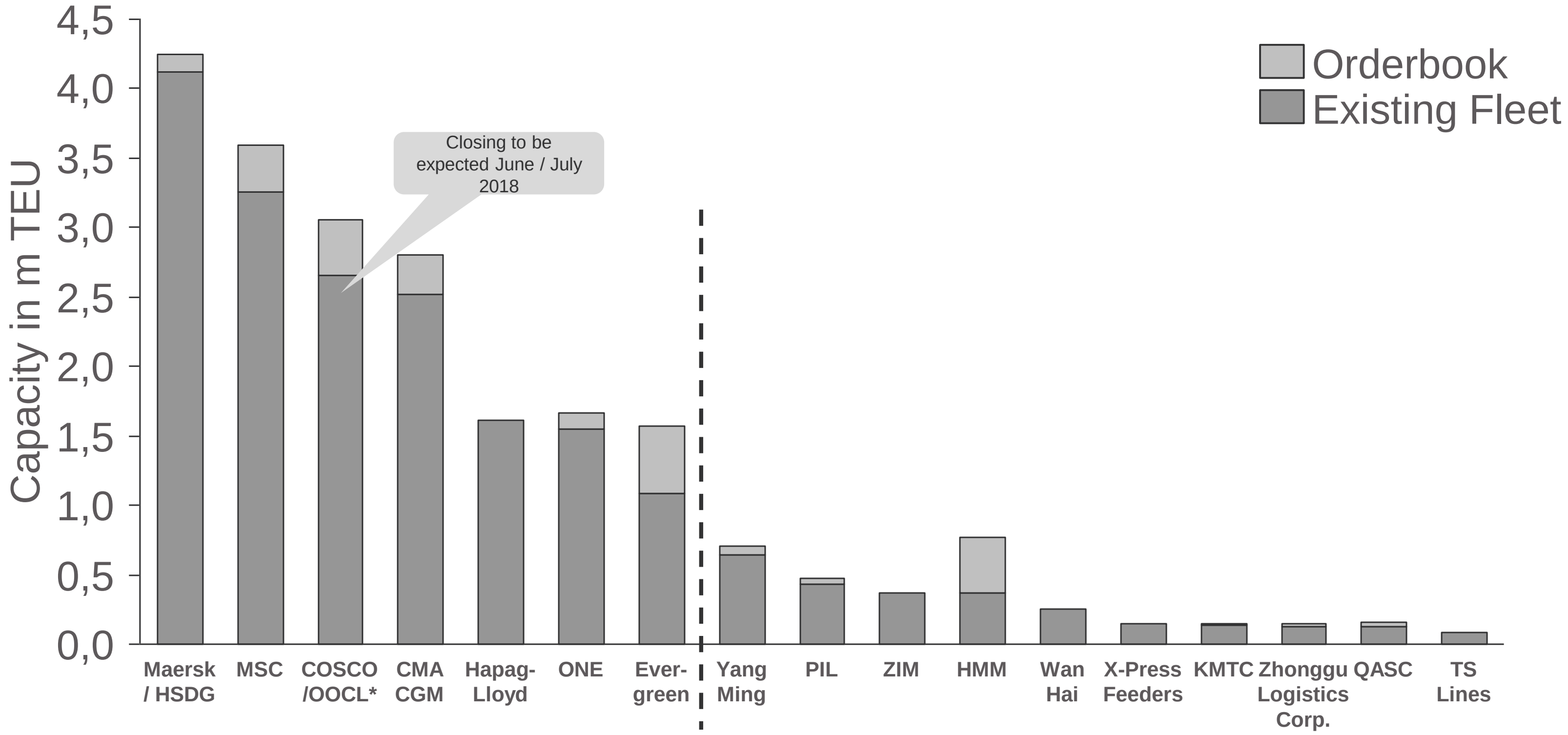
Continued supply-side consolidation is changing the dynamics and differentiators in the industry

M&A waves in container shipping



Note: Top 5 market share of 64% assumes completion of pending mergers Source: Alphaliner

Carrier Consolidation – Outlook 2018*

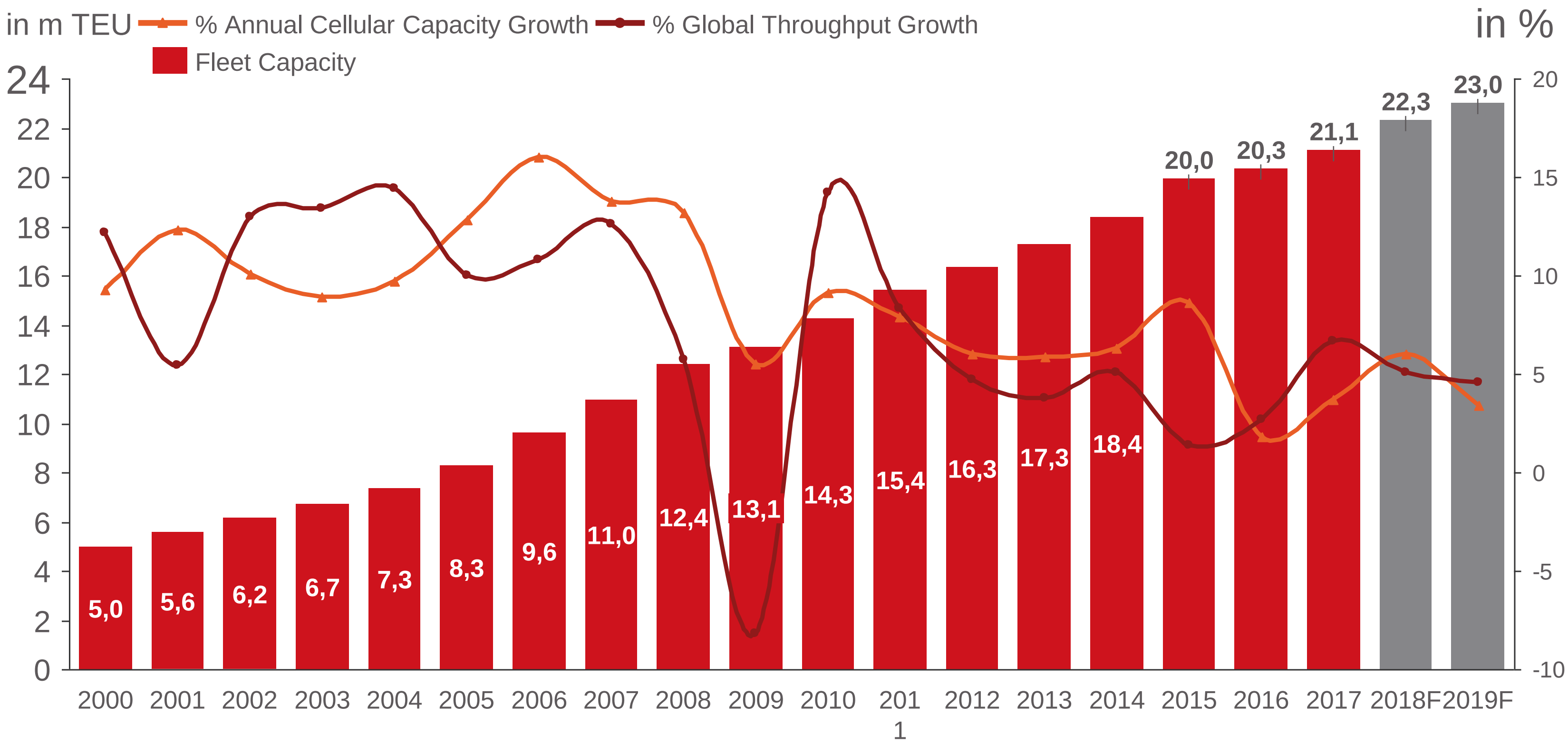


Source: Alphaliner Top 100, April 2018

*The proposed transaction is subject to regulatory approvals

Cellular Fleet Growth vs. Global Throughput

2000-2018F (in %)



Source: Alphaliner Monthly Monitor April 2018


HAMBURG SÜD
MAERSK

Maersk: The global integrator of container logistics

Global integrator of container logistics
– connecting and simplifying
our customers' supply chains

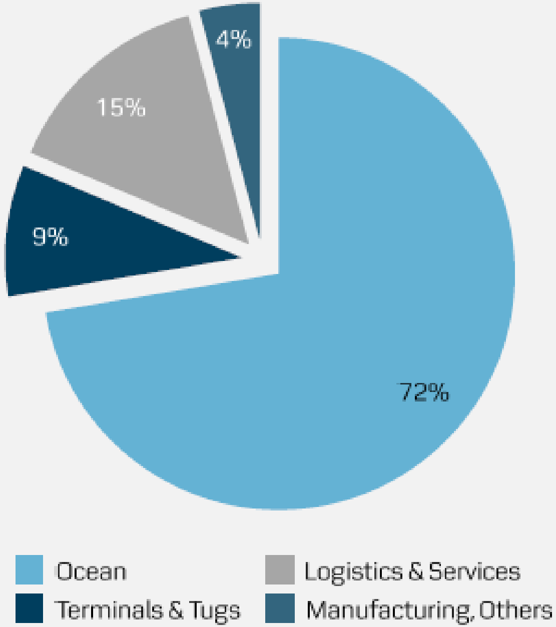
Simple end-to-end offering
of products and services

Seamless customer engagement

Superior delivery network end-to-end

Higher revenue growth in non ocean segments

2017 segment revenue split incl. Hamburg Süd pro forma[1]



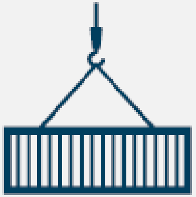
Note: (1) Excluding unallocated revenue and eliminations
Source: Maersk

Why we want to grow non-ocean revenue

- There is demand from customers for a more integrated solution
- Revenue potential is higher than ocean
- Non-ocean revenue is asset light and leverages our existing network
- Successful implementation should maximise revenue growth, provide more stable returns, and reduce capital intensity

>8.5% ROIC over the cycle and growing revenue

Why digitisation – removing barriers to global trade



More than **USD 4 trillion** value of goods are shipped each year

Over **80%** of international world trade is transported by sea

By reducing barriers within the international supply chain, global trade could increase by nearly **15%**, boosting economies and creating jobs

Estimated costs to all parties in the supply chain arising from limited visibility and lack of standardisation averages **one-fifth** of the overall cost of goods

Source: "Enabling Trade – Valuing Growth Opportunities", industry report by World Economic Forum. "Trade Cost", research paper by Anderson & Wincoop

Supply chain seen from a Kenyan flower exporter

1. Farm fills out Phytosanitary Certificate
2. Freight forwarder fills the Certificate of Origin
3. Mombasa port authorities to approve
4. Documents back to Nairobi for archival
5. Documents airfreighted to European freight forwarder
6. Consulting company to prepare and package docs
7. Courier transports documents to Antwerp port
8. If documents ok, truck driver picks up the container
9. Dutch customs control documents and inspects cargo
10. Documents in order? –> Container released

+200 documents

+20 parties

Separate cargo and paper flow

Timely and costly

Risk of delays

Source: Maersk

Currently, complexity only increases with scale

Large retailer

+2,000 sales points	30 regional warehouses	70 external vendors	+80,000 purchase orders	12 ocean carriers	43 days of inventory	Sourcing from +30 countries

Source: Maersk

The case for the integrator

From	To
Complex	Simple
Manual	Digitised
Commoditised	Value creating
Shipping	Logistics
Product centric	Customer centric
Fragmented	Integrated

The integrator of container logistics

- Coordinated chain of delivery → **Reliability**
- Digital innovation → **New services**
- Tailor-made solutions / Expand product exposure → **Integrated offerings**

Data

Source: Maersk

Colombia Contenedores 2017

HAMBURG SÜD

EXPORTS	2.016	2.017	%
CARTAGENA CO	184.240	195.311	6%
BUENAVENTURA	154.472	161.017	4%
BARRANQUILLA	39.030	40.555	4%
SANTA MARTA	59.372	69.506	17%
Total Export	437.114	466.389	7%

IMPORTS	2.016	2.017	%
CARTAGENA CO	293.010	296.479	1%
BUENAVENTURA	434.927	431.093	-1%
BARRANQUILLA	70.462	69.444	-1%
SANTA MARTA	23.741	24.462	3%
Total Imports	822.140	821.478	0%

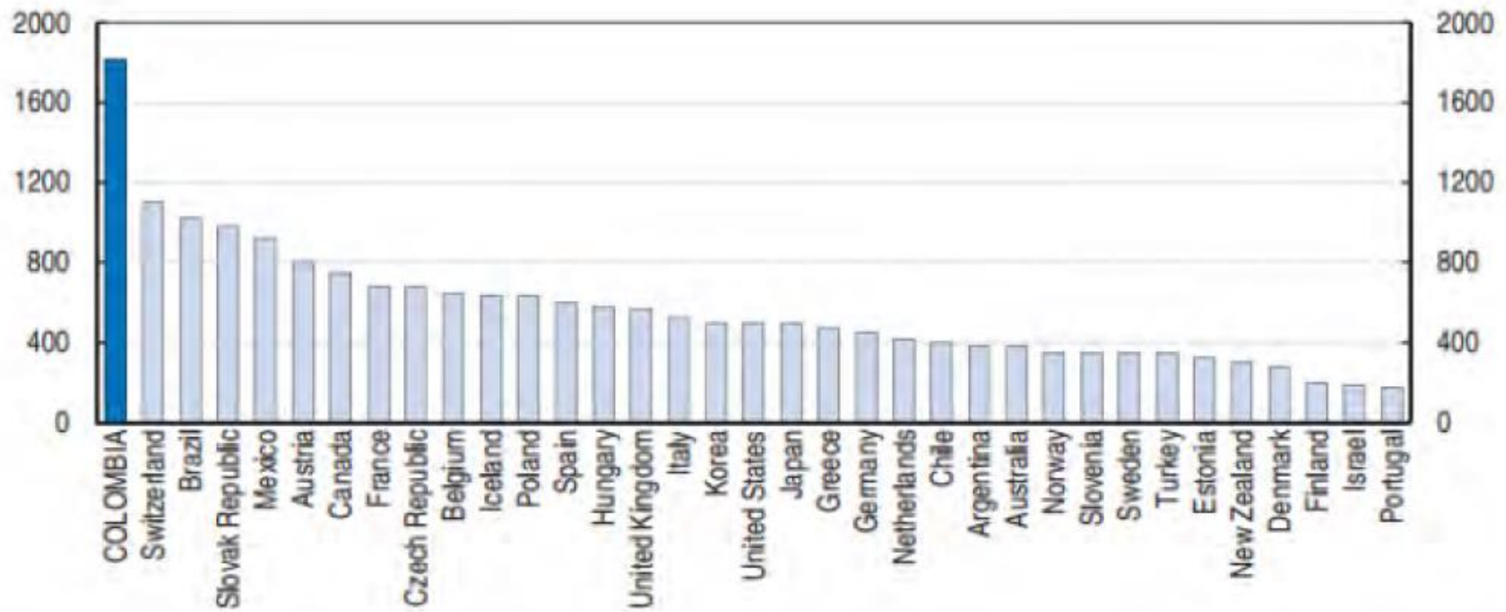
TOTAL	2.016	2.017	%
CARTAGENA CO	477.250	491.790	3%
BUENAVENTURA	589.399	592.110	0%
BARRANQUILLA	109.492	109.999	0%
SANTA MARTA	83.113	93.968	13%
Total Import & Export	1.259.254	1.287.867	2%

Countries 2017	MPORTACION	EXPORTACION	TOTAL
ESTADOS UNIDOS	139.641	100.399	240.040
CHINA	214.429	7.991	222.420
BRASIL	66.989	34.196	101.185
MEXICO	72.071	18.062	90.133
CHILE	44.224	32.232	76.456
PERU	20.668	45.748	66.416
BELGICA	18.498	45.329	63.827
ALEMANIA	26.129	13.528	39.657
INDIA	24.017	8.205	32.222
ESPANA	23.626	7.636	31.262
Total Top 10	**650.292**	**313.326**	**963.618**
Grand Total	**827.085**	**530.053**	**1.357.138**
%	**79%**	**59%**	**71%**

Teus	2.017	2.018
Fruit	127.366	35.247
Resin	70.577	17.780
Coffee	38.885	9.286
Sugar	25.051	6.070
Total	**261.879**	**68.383**
Total Mercado	**530.053**	**136.916**
%	**49%**	**50%**

Colombia Indicador Logistico

Inland Transportation Costs for International Trade (US $ per container)



Source: OECD, "Boosting Productivity and Economic Growth," *OECD Economic Surveys: Colombia 2013*, January 31

Colombia Logistics Performance 2016

HAMBURG SÜD

INTERNATIONAL SCORECARD

The international score uses six key dimensions to benchmark countries' performance and also displays the derived overall LPI index. The scorecard allows comparisons with the world (with the option to display world's best performer) and with the region or income group (with the option to display the region's or income group's best performer) on the six indicators and the overall LPI index.

The logistics performance (LPI) is the weighted average of the country scores on the six key dimensions:

1) Efficiency of the clearance process (i.e., speed, simplicity and predictability of formalities) by border control agencies, including customs;

2) Quality of trade and transport related infrastructure (e.g., ports, railroads, roads, information technology);

3) Ease of arranging competitively priced shipments;

4) Competence and quality of logistics services (e.g., transport operators, customs brokers);

5) Ability to track and trace consignments;

6) Timeliness of shipments in reaching destination within the scheduled or expected delivery time.

The scorecards demonstrate comparative performance—the dimensions show on a scale (lowest score to highest score) from 1 to 5 relevant to the possible comparison groups—of all countries (world), region and income groups.

Country	Year	LPI Rank	LPI Score	Customs ?	Infrastructure ?	International shipments ?	Logistics competence ?	Tracking & tracing ?	Timeliness ?
Peru	2016	69	2.89	2.76	2.62	2.91	2.87	2.94	3.23
Region: Latin America & Caribbean	2016		2.66	2.48	2.46	2.69	2.60	2.67	3.05
Colombia	2016	94	2.61	2.21	2.43	2.55	2.67	2.55	3.23

Caso Mission Arato

HAMBURG SÜD

Solucion Logistica

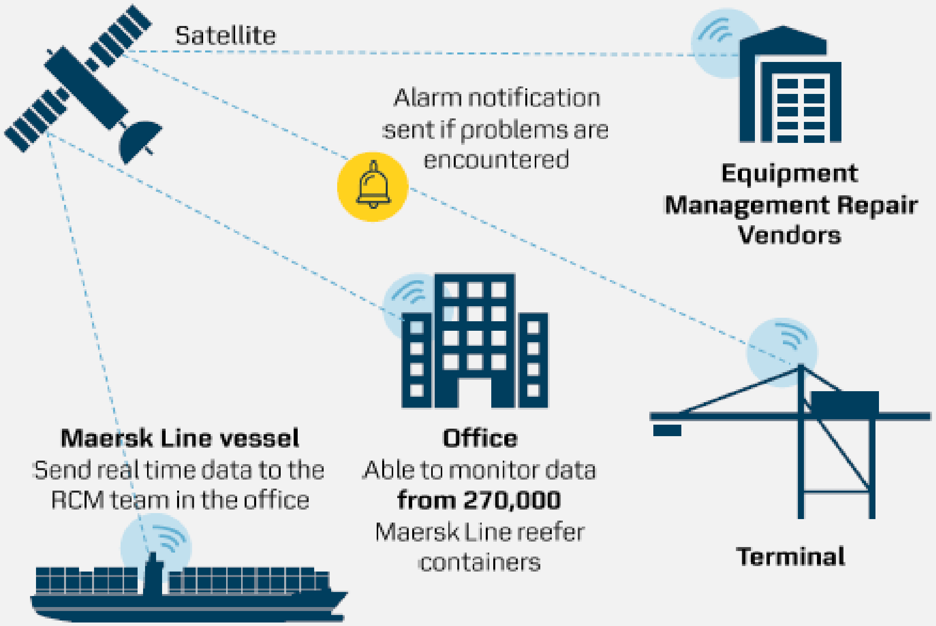
- Mission asigna 1Ha junto a la planta empacadora de aguacate, APMT invierte US1Mill en desarrollar centro logístico: patio de contenedores, área de lavado y PTI, energía para contenedores full, gruas, transporte, almacen insumos.
- APMT lleva insumos y fruta fresca en los reefers vacios, lava y hace PTI; y retorna con reefers full para exportación, eficiencia en el viaje ida y vuelta.

Mission AVOCADOS

Example 3

Remote container management of reefer containers improves ability to trade perishable goods

RCM in short



What the customer gets

Source: Maersk


HAMBURG SÜD


MAERSK
HAMBURG SÜD


HAMBURG SÜD

1^er CONGRESO INTEGRADO

ZONAS FRANCAS Y PUERTOS

PLATAFORMAS LOGÍSTICAS Y
LA 4ª REVOLUCIÓN INDUSTRIAL

ANDI | MÁS PAÍS