



FONASBA ANNUAL MEETING



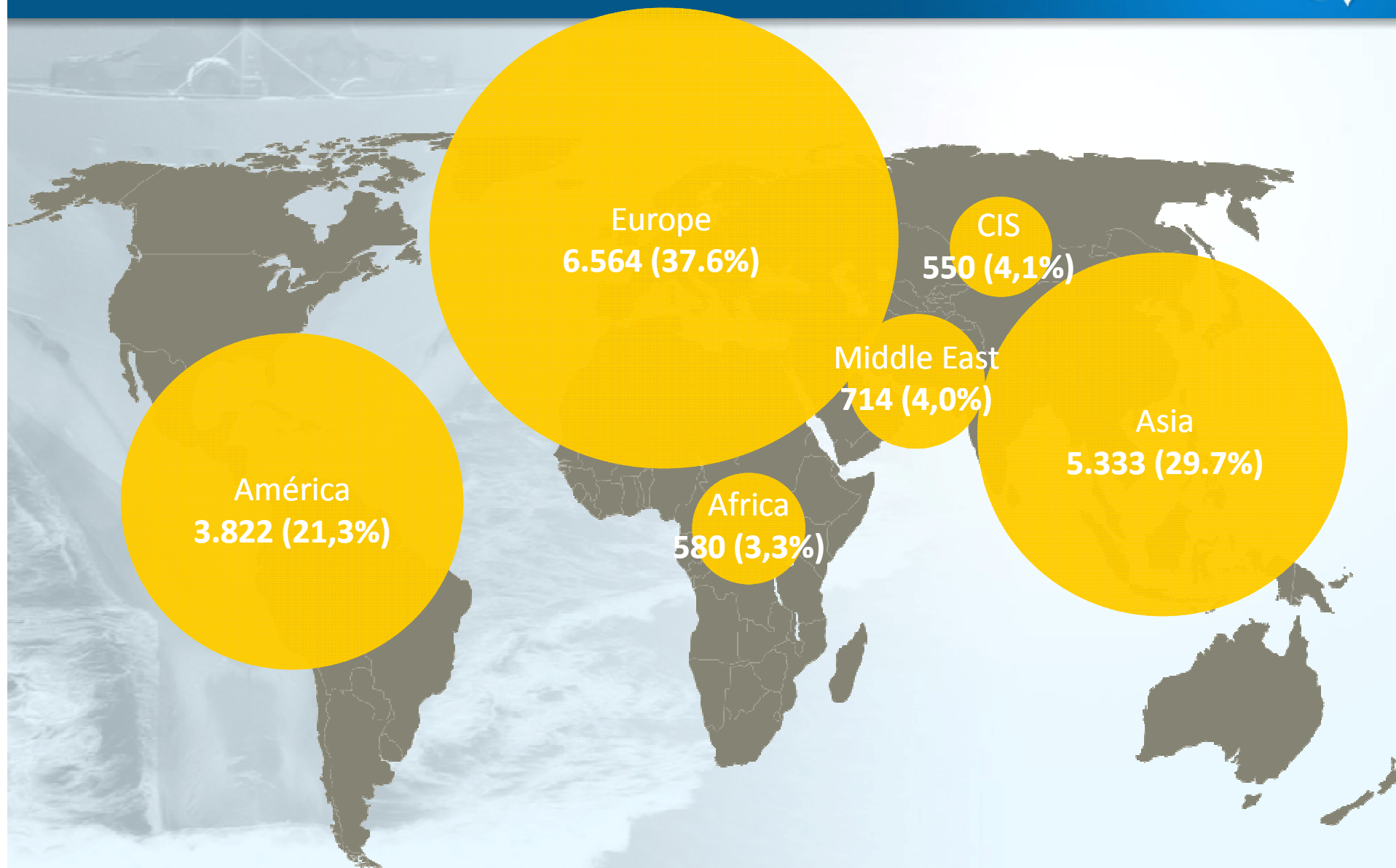
CIANAM REPORT

Francisco Orozco Mendoza

President

Gothenburg 2014

World merchandise trade (USD billions & %)



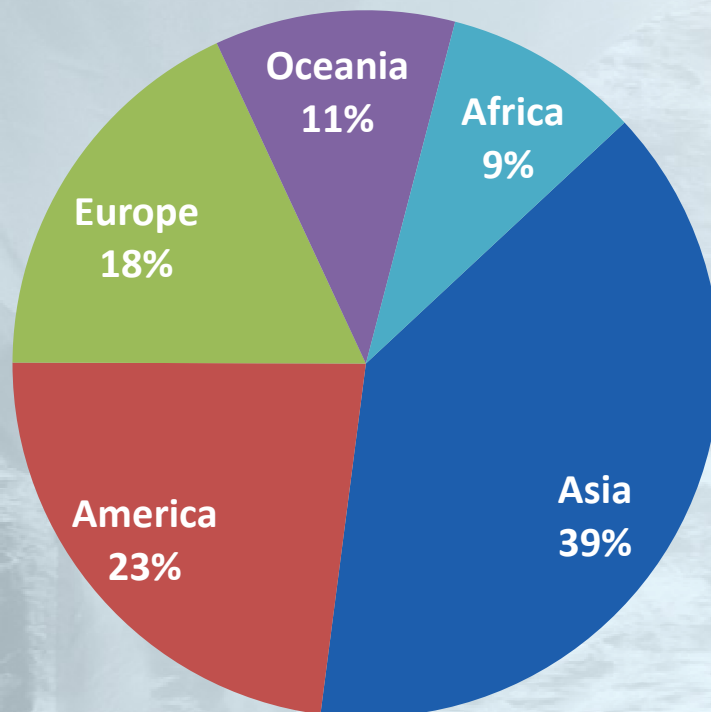
SOURCE: UNCTAD (UNITED NATIONS CONFERENCE ON TRADE AND DEVELOPMENT)

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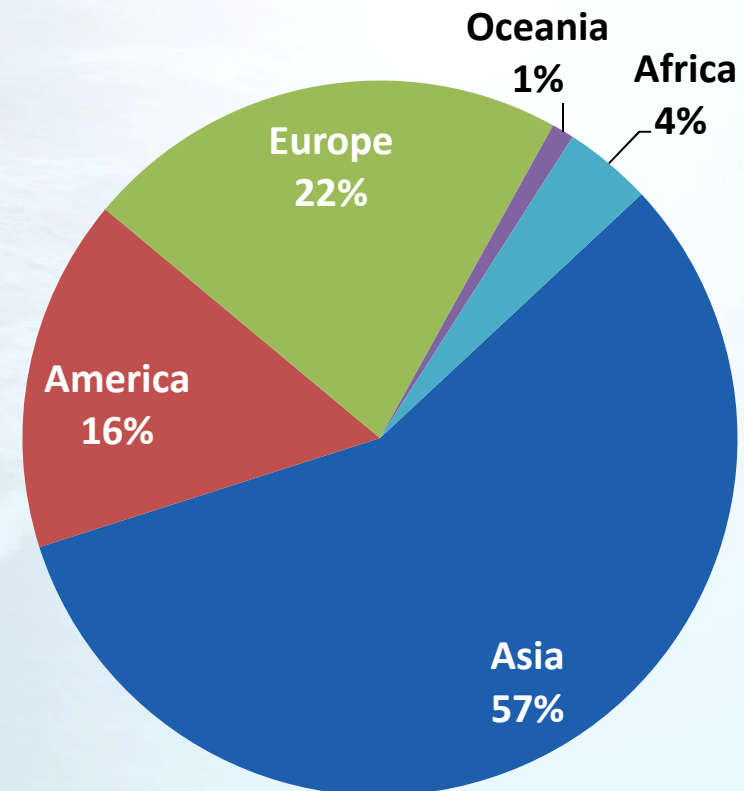
World seaborne trade in 2013 (% in world tonnage)



Exports



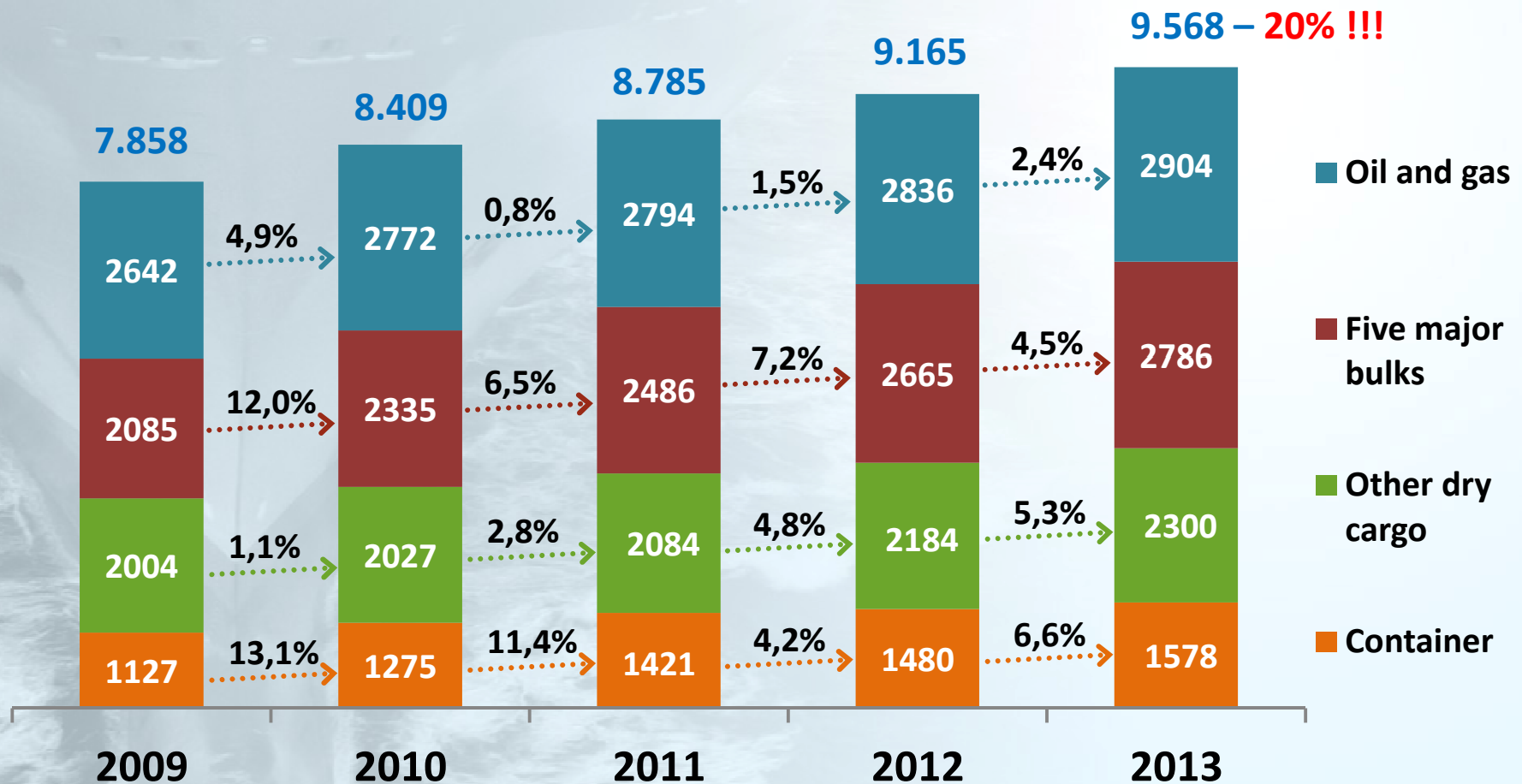
Imports



World seaborne trade in 2009-2013 by type of cargo (millions of tons)



Type of cargo



Container move World Ranking



#	Port	Country
1	Shanghai	China
2	Singapur	Singapur
3	Hong Kong	China
4	Shenzhen	China
5	Busán	Corea del Sur
6	Ningo-Zhoushan	China
7	Guangzhou	China
8	Qindao	China
9	Jebel Ali Dubai	EAU
10	Tianjin	China
11	Rotterdam	Holanda
14	Hamburgo	Alemania
16	Los Ángeles	E.U.
25	Nueva York	E.U.
40	Colón	Panamá
41	Balboa	Panamá
42	Santos	Brasil
71	Manzanillo	México

#	Port / Latinamerica	Country
1	Colón	Panamá
2	Balboa	Panamá
3	Santos	Brasil
4	Cartagena	Colombia
5	Buenos Aires (incluyendo Exolgan)	Argentina
6	Manzanillo	México
7	Kingston	Jamaica
8	Callao	Perú
9	Guayaquil	Ecuador
10	Freeport	Bahamas
14	Lázaro Cárdenas	México
19	Veracruz	México
24	Altamira	México

Fleet Capacity Evolution



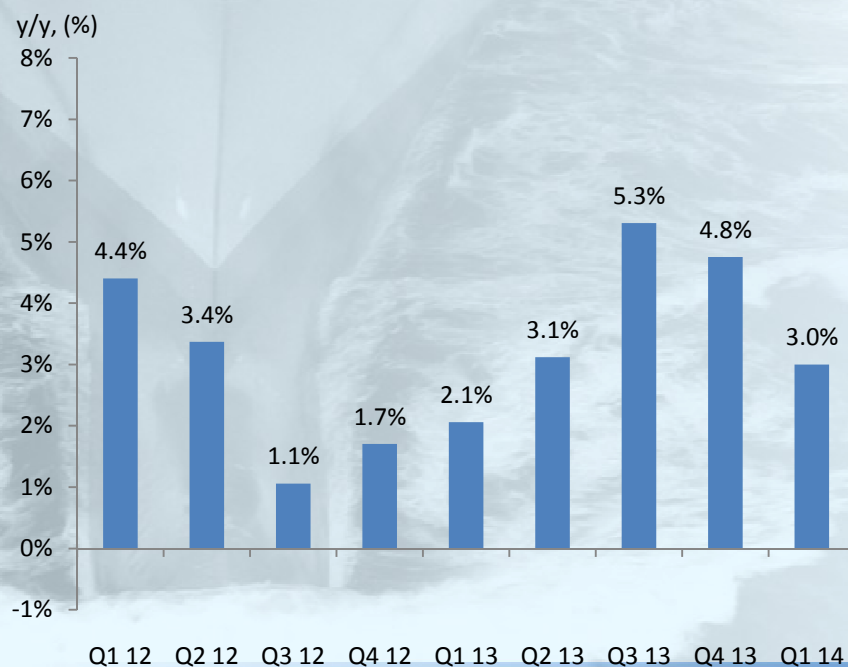
Generación		1a	2a	3a	4a	5a	6a	7a	8a
Tipo de Embarcación	Barge	Feeder (1956-70)	Standard (1970-80)	Panamax Class (1980-88)	Post Panamax (1988-2000)	Post Panamax Plus (2000-05)	New Panamax (2006)	Ultra Large Container Vessels (2012)	Triple-E (2013)
Eslora [Largo] (m)	80-120	131-200	215-225	250-290	275-305	300-345	366-398	396-398	400
Manga [Ancho] (m)	10 - 15	17 - 21	20 - 29	32	32 - 40	41 - 43	49	54 - 56	59
Calado [Profundidad] (ft)	< 24	< 30	30 - 37	36 - 40	36 - 44	43 - 47	50 - 52.5	50 - 52.5	50 - 54
No. de Filas aprox.	2-6	8	10	13	16	17	20	22	23
Sección Transversal									
Capacidad: TEU's	100	500 800	1,000 2,500	3,000 4,000	4,000 5,000	5,000 8,000	11,000 14,500	16,020	18,270



Container Global demand growth declined in comparison with previous quarters, reaching 3% in the first quarter of 2014

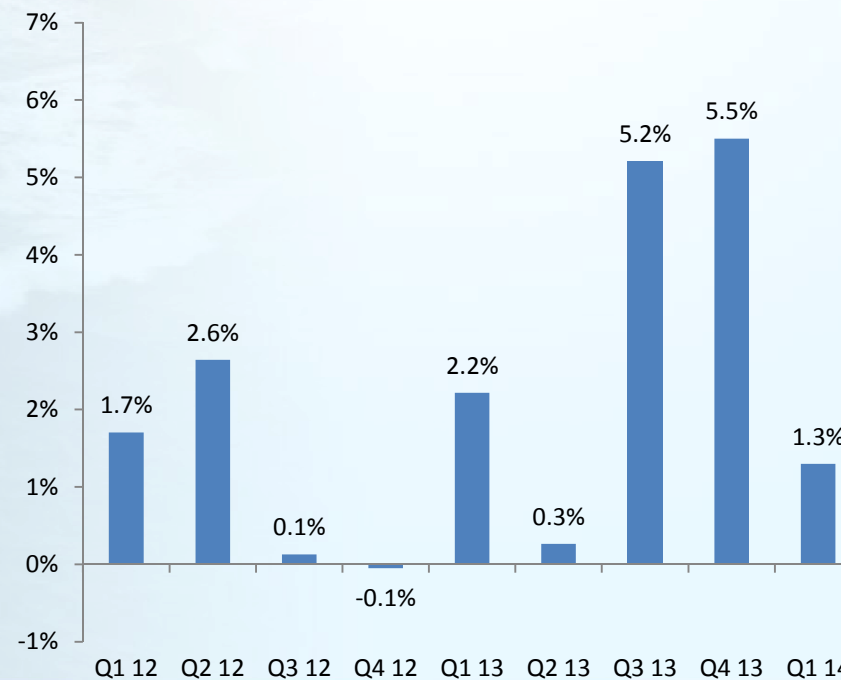
Source: Alphaliner

Container demand growth



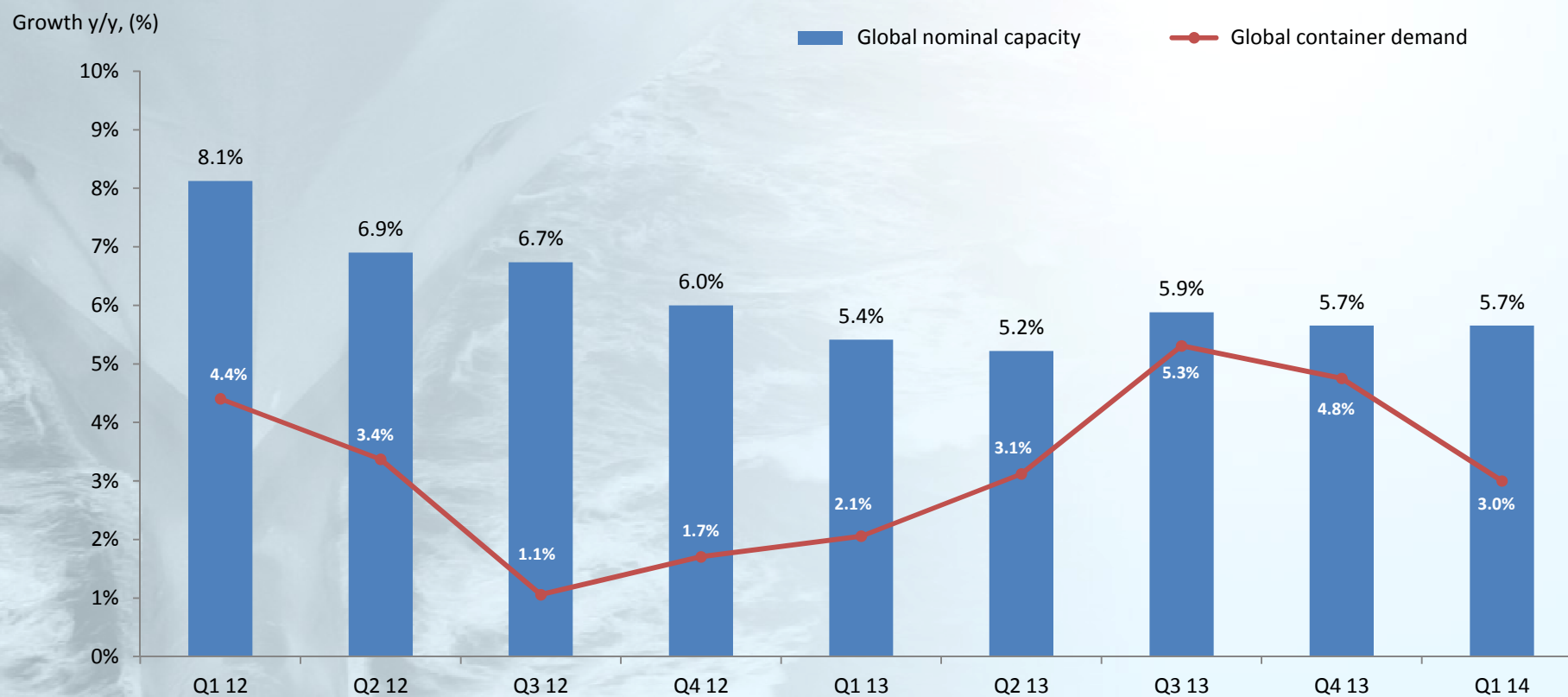
Mainly caused by USA ...

NAM container demand y/y growth, (%)





Nominal Capacity continues growing in a higher level compared to Container demand, generating vessel over capacity (Order delivery avg of 215 new ships from 2012 to early 2014) source: Alphaliner





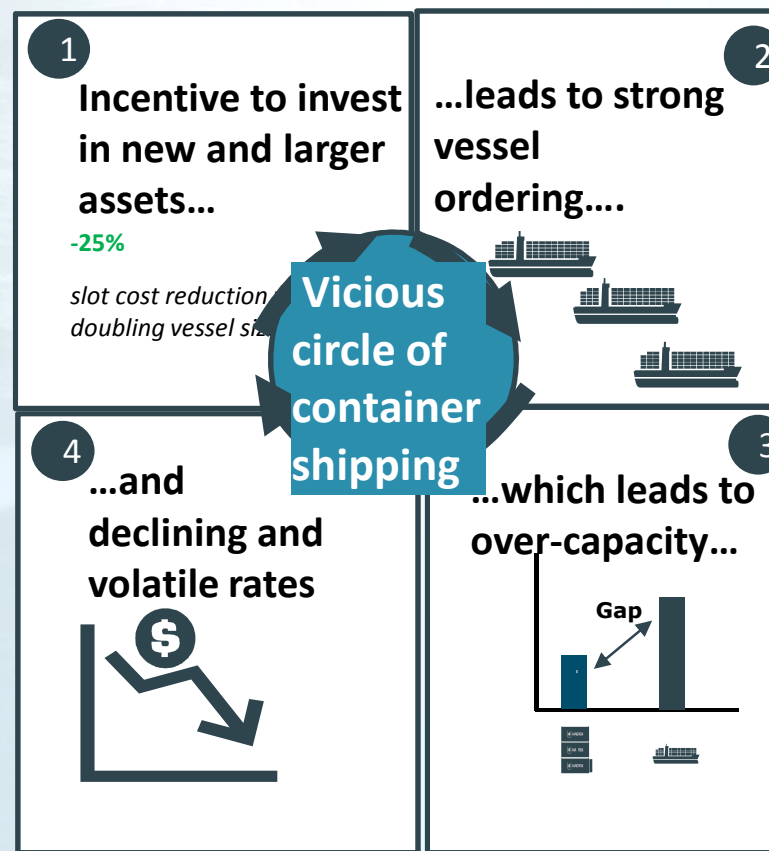
Vicious circle of container shipping

source: Alphaliner

- ... and same trend is expected for the end of 2014



- Vessel over capacity will cause rates level depression, forcing the Industry to cut costs



Agenda of the IX Annual Meeting



- 1** Outsourcing Services. DA Desk- Agents Database
- 2** Legal Recognition and Charter for Maritime Agents
- 3** World Trade Organization – New rules for facilitation
- 4** FQS: Fonasba Quality Standard update
- 5** Education. Lima declaration 2013
- 6** Members Financing
- 7** WCO Facilitation Rules – Initiative and procedures by Local Customs
- 8** Experience on the non intrusive inspections on container cargo
- 9** Election of a new board
- 10** Election of the new host for the XII Meeting of CIANAM

Annual Meeting - Next host countries



2015

PANAMA

2016

PARAGUAY



THANK YOU!!!

Gothenburg 2014