



Consultoría de Negocios  
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# Corredores emergentes de transporte

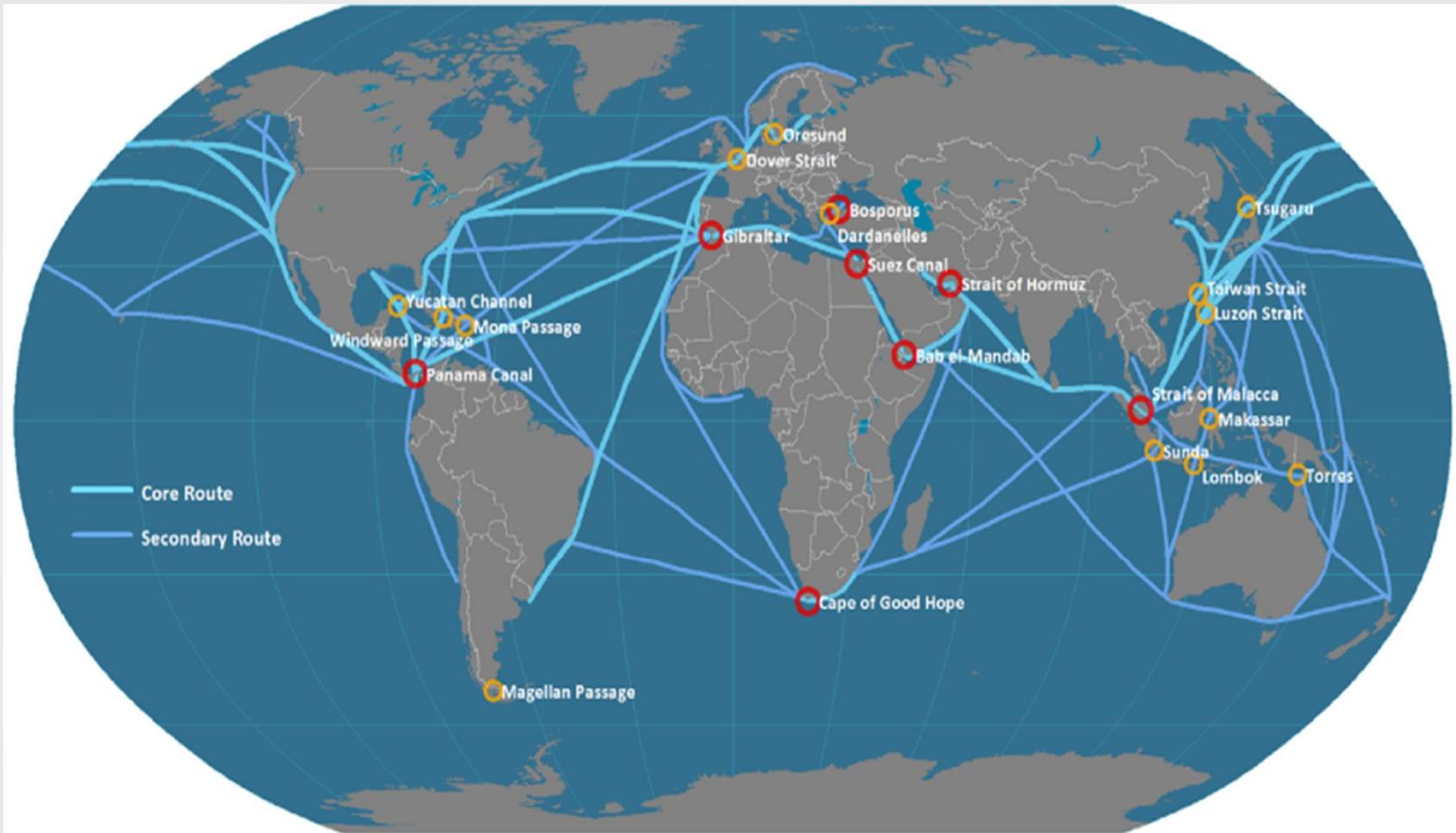
Ricardo A. Moreno R. - MCI

**Gracias a los organizadores del V Congreso internacional de Supply Chain y Logística por extendernos tan honrosa invitación y por supuesto a todos ustedes, por permitirme compartirles algunas ideas y pensamientos.**

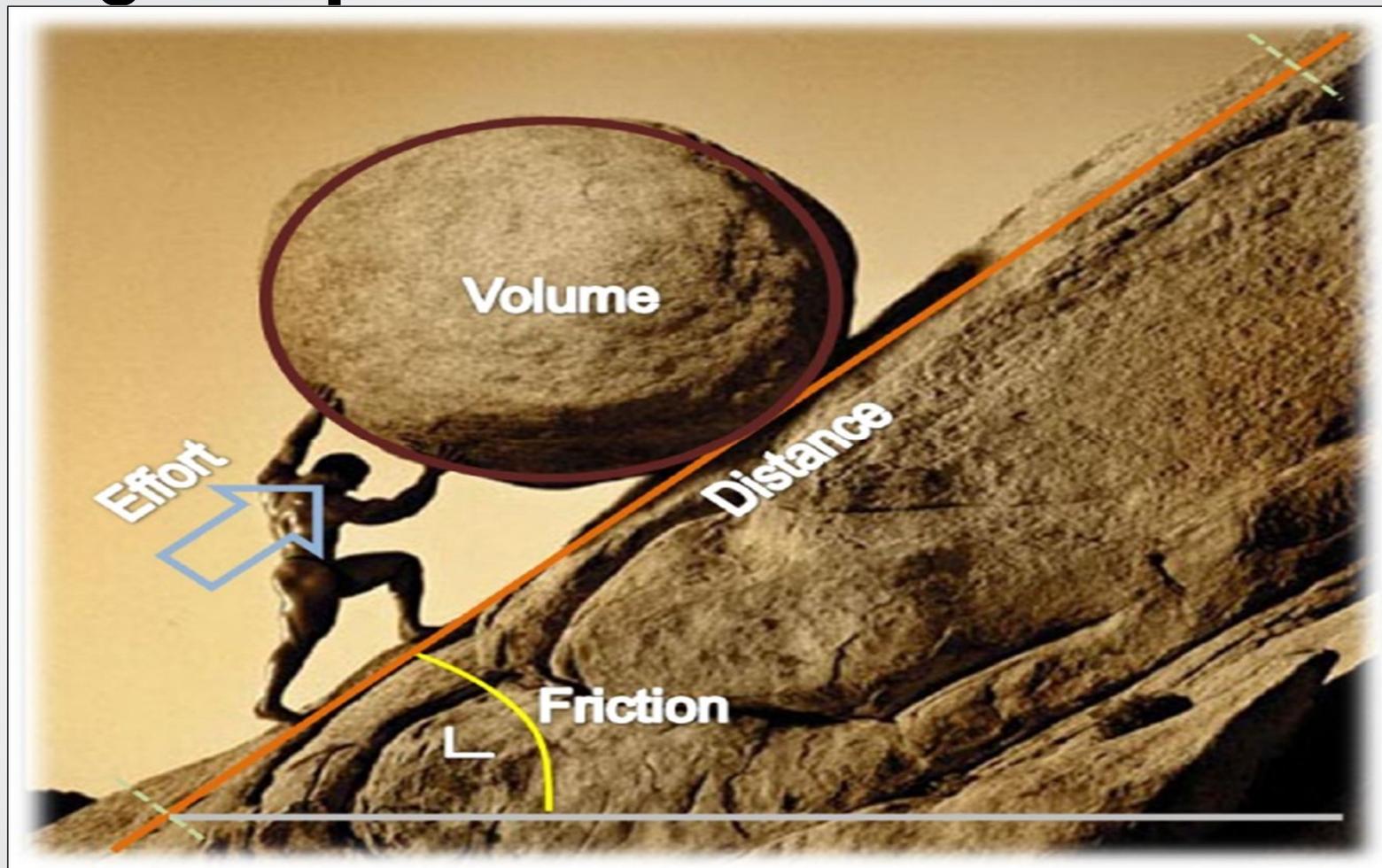
**Esta presentación utiliza material de distintas fuentes y autores que es utilizada estrictamente con fines académicos.**

# CONTEXTO

# Principales rutas marítimas globales



# ¿Por qué unas «nuevas» rutas?



# ¿Por qué unas «nuevas» rutas?

## Libre comercio transpacífico

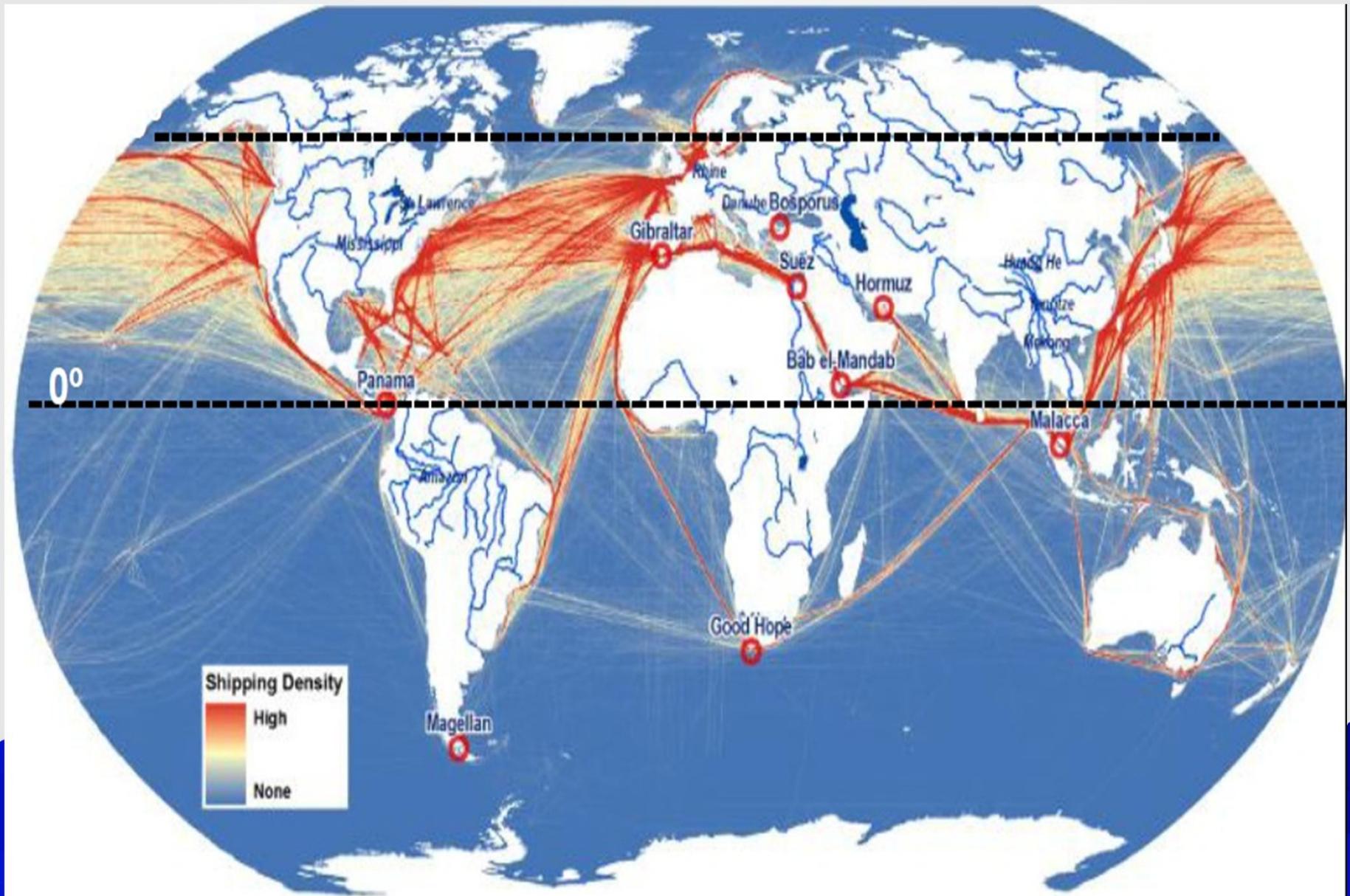
La Zona de Libre Comercio Transpacífica será el área de intercambio más grande del mundo

■ *Paises participantes* ■ *Interesados*

Población **800 millones**  
Peso económico **25 billones de dólares**  
(40% de la economía mundial)



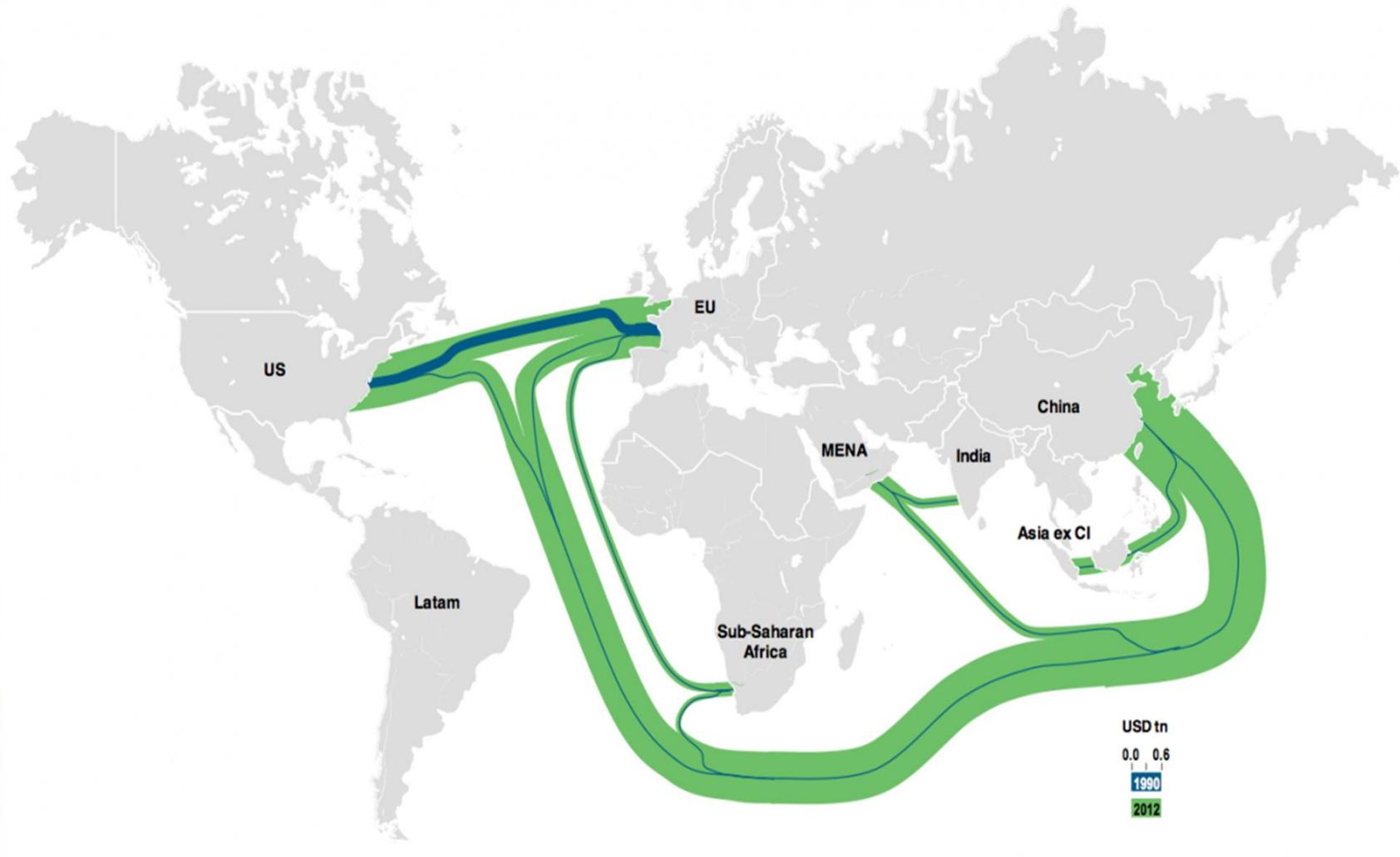
# ¿Por dónde pasa el Transporte Global?



# De cómo cambió el comercio...

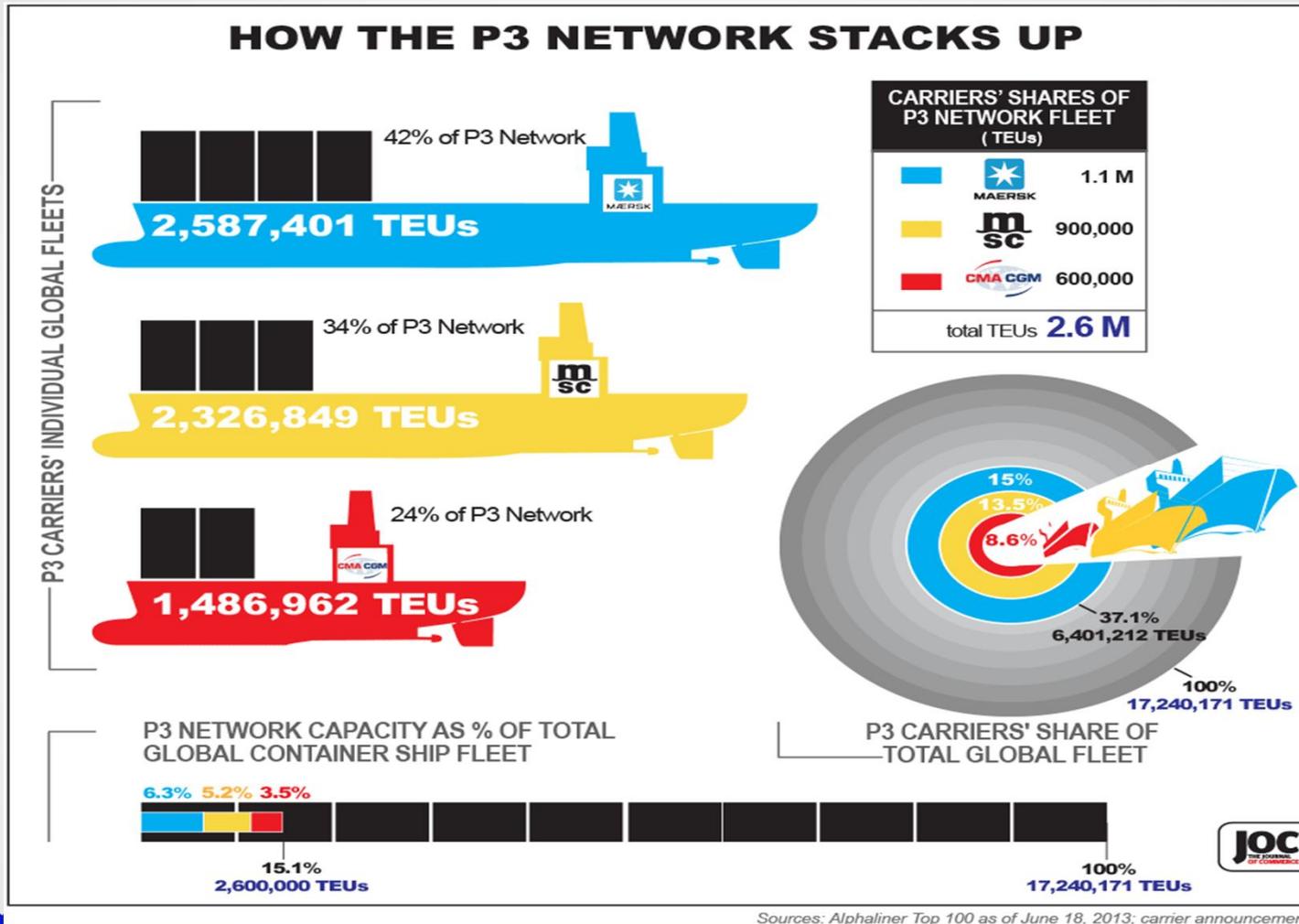
Figure 3: China has emerged as a mega-trader

Exports, major trade corridors, 1990 and 2012



Source: IMF DOTS, Standard Chartered Research

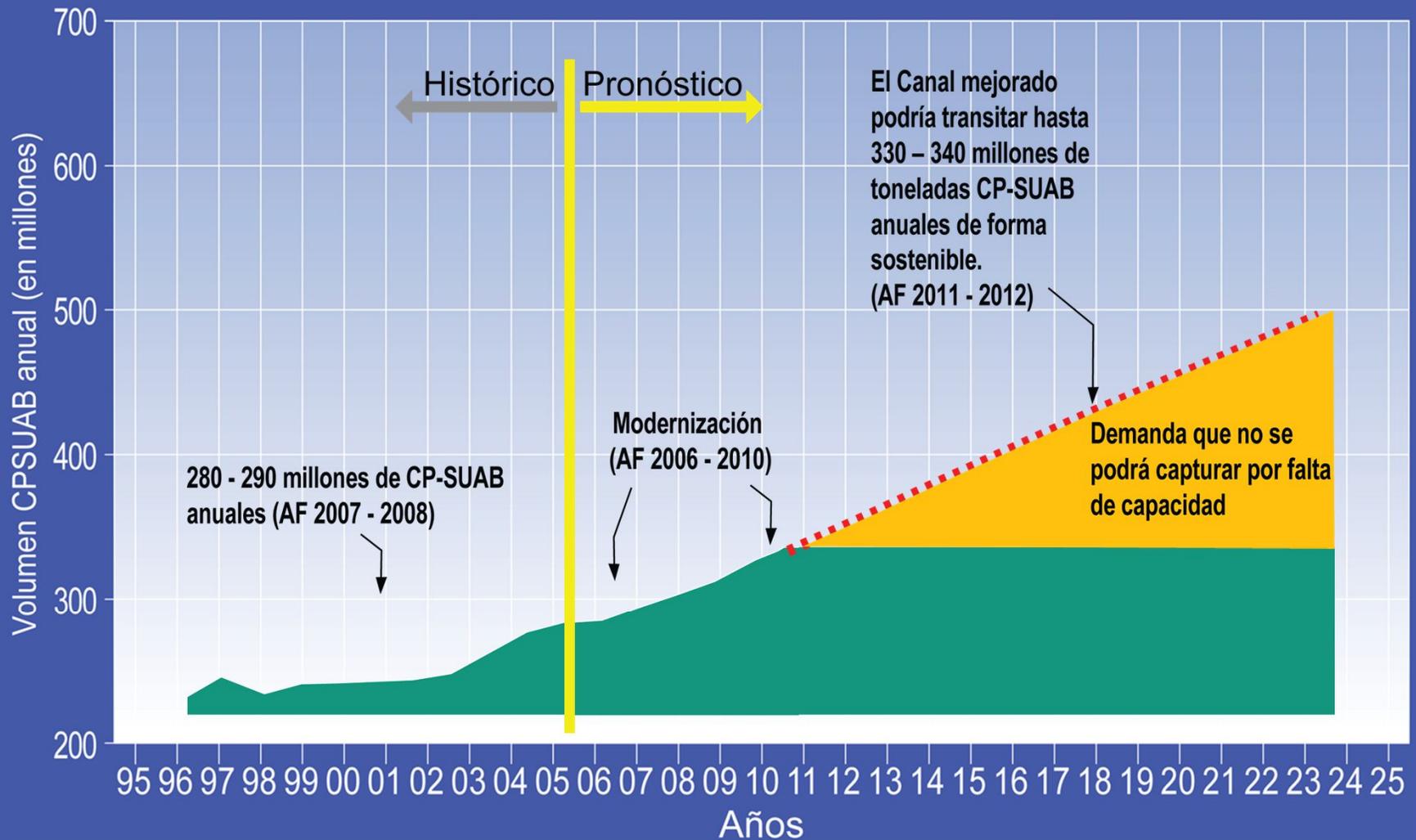
# ¿Quiénes se pelean este pastel?



# CANAL DE PANAMÁ

# ¿Panamá vs. Nicaragua?

## Capacidad Máxima Sostenible del Canal Actual



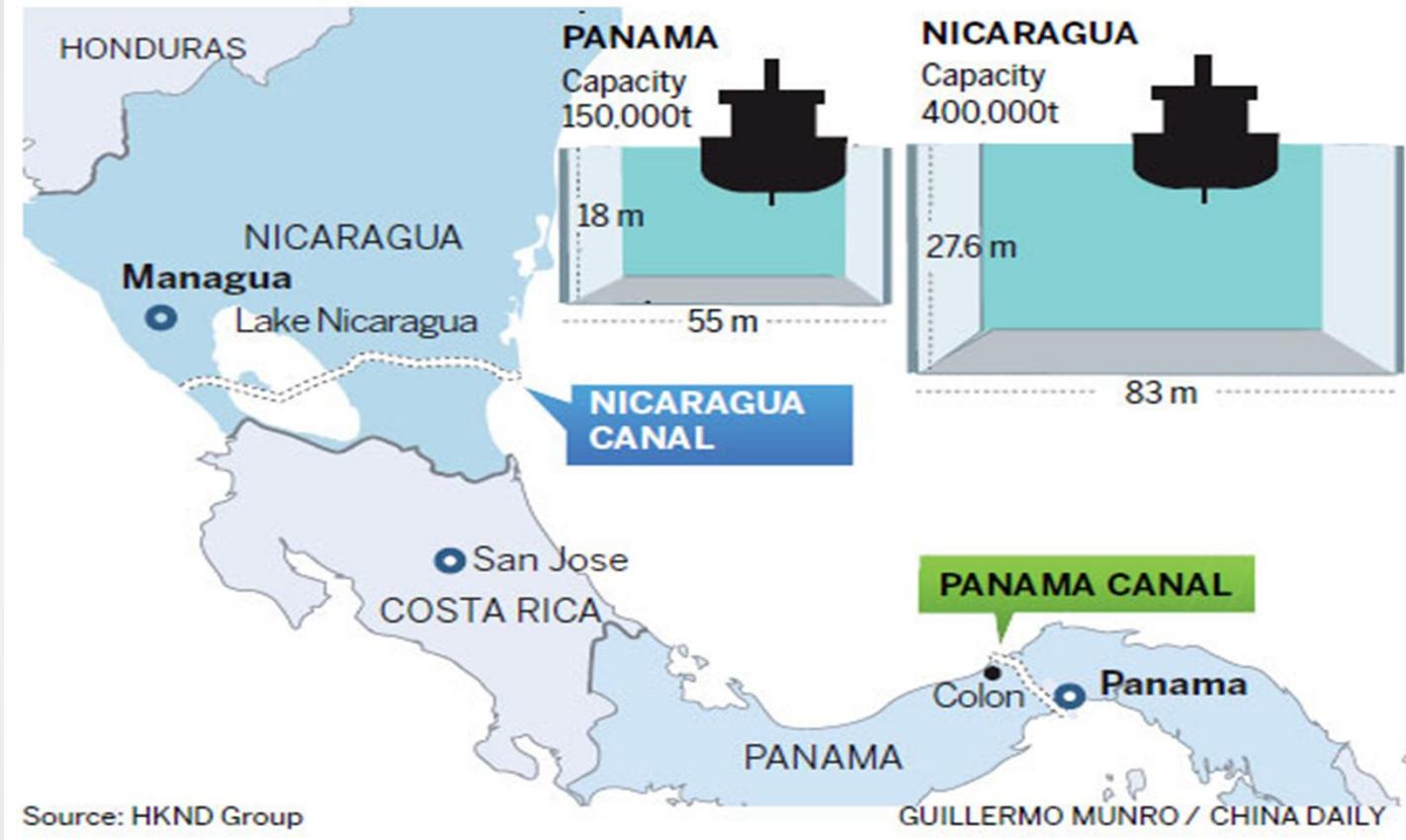
— Capacidad Máxima Sostenible  
- - - Demanda Potencial Probable

■ Demanda Manejable

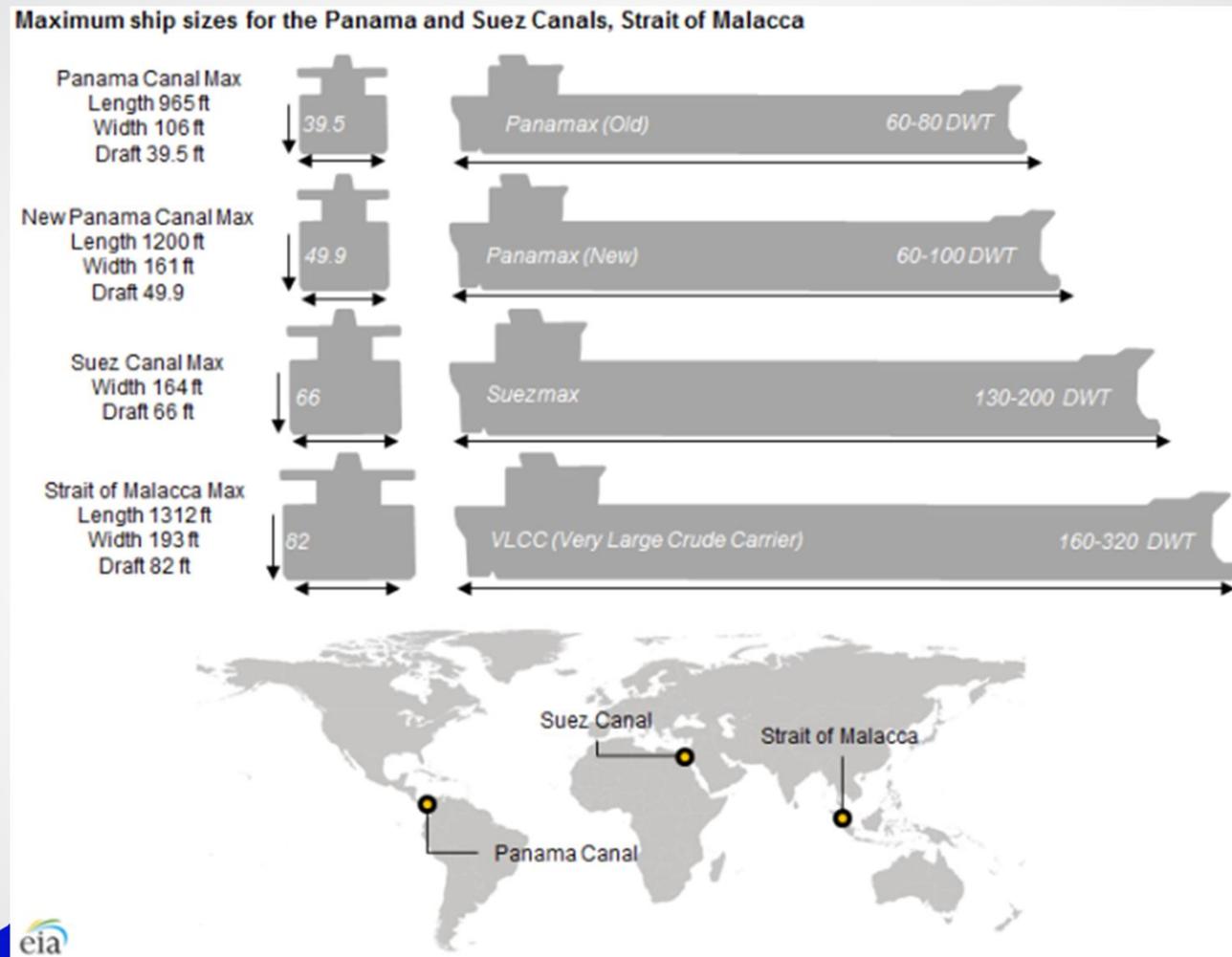
# CANAL DE NICARAGUA, ¿PARA QUÉ?

# Comparar es odioso, pero necesario

## THE PLANNED NICARAGUA CANAL



# Comparar es odioso, pero necesario

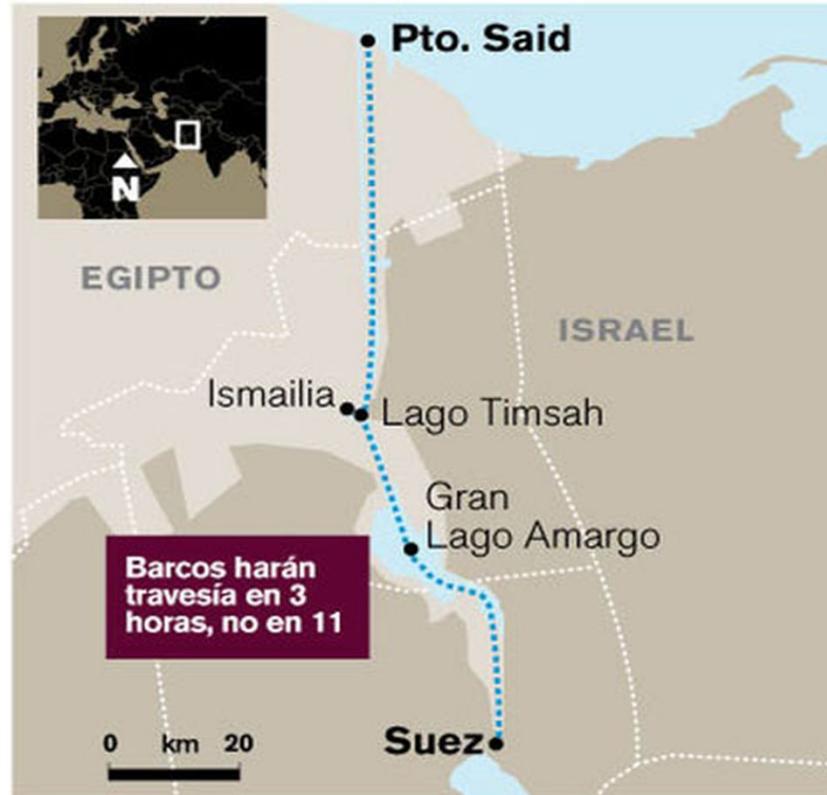


# CANAL DE SUEZ Y LAS ANTIGUAS RUTAS

# Suez en cifras

## El 'nuevo' paso hacia el Oriente

..... RUTA DEL CANAL



Longitud de la vía marítima: **161 km**

Longitud del sector ampliado del Canal: **72 km**

Costo de los trabajos de ampliación: **\$9.000 mill.**

1869

Año de apertura  
de la vía

1956

Nacionalización  
del Canal



**7,5%** Tráfico del **comercio marítimo mundial** que pasaba por el Canal en el 2007.



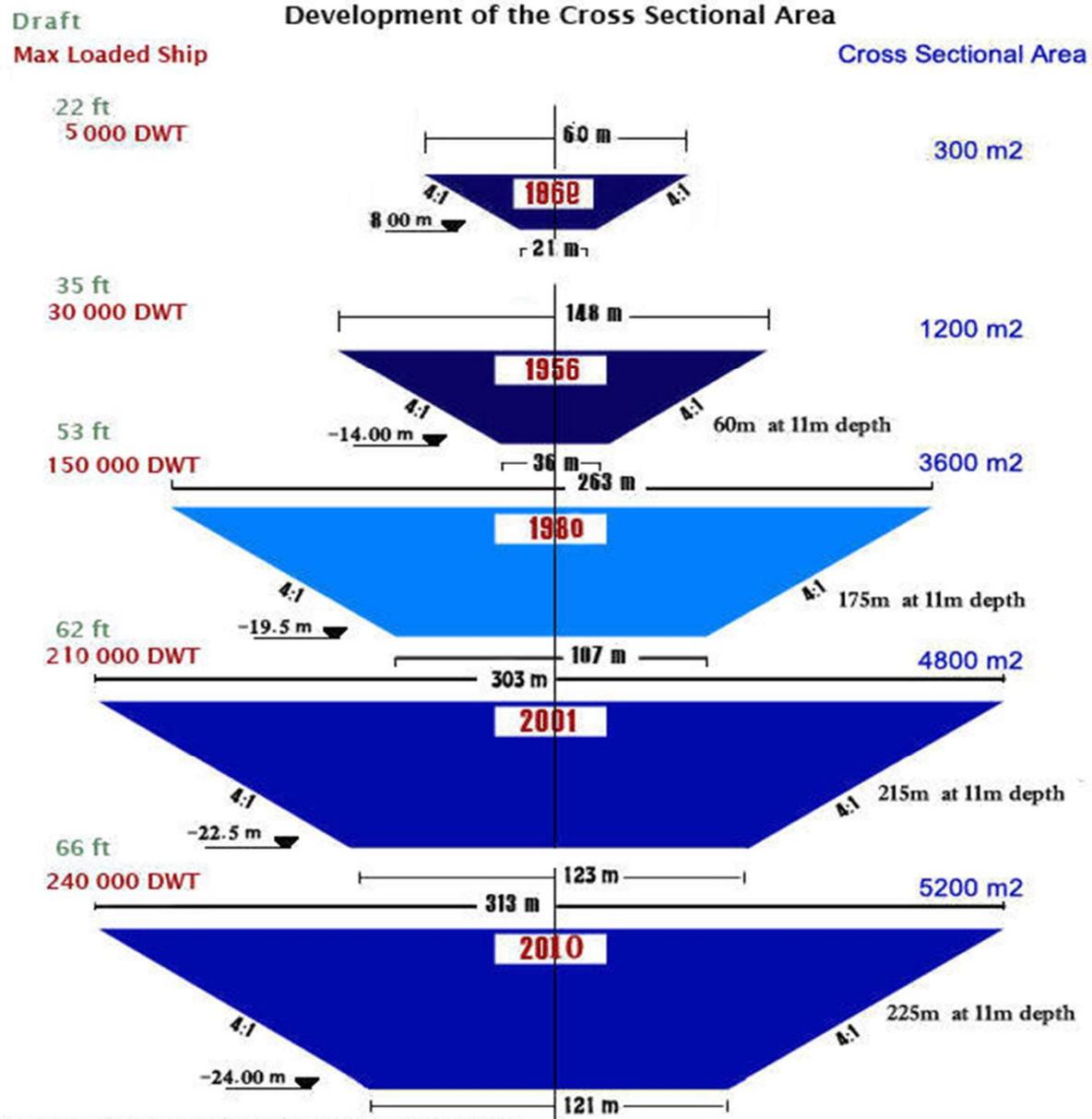
**97** Navíos **podrán atravesar** la vía en el 2023. Hoy lo hacen 48.



**\$13.200 millones:** Monto que espera recaudar Egipto por peajes en el 2023.

FUENTE: **AGENCE FRANCE-PRESSE (AFP)**

# El trabajo en Suez



# Los tres pasos

## Nicaragua approves canal project

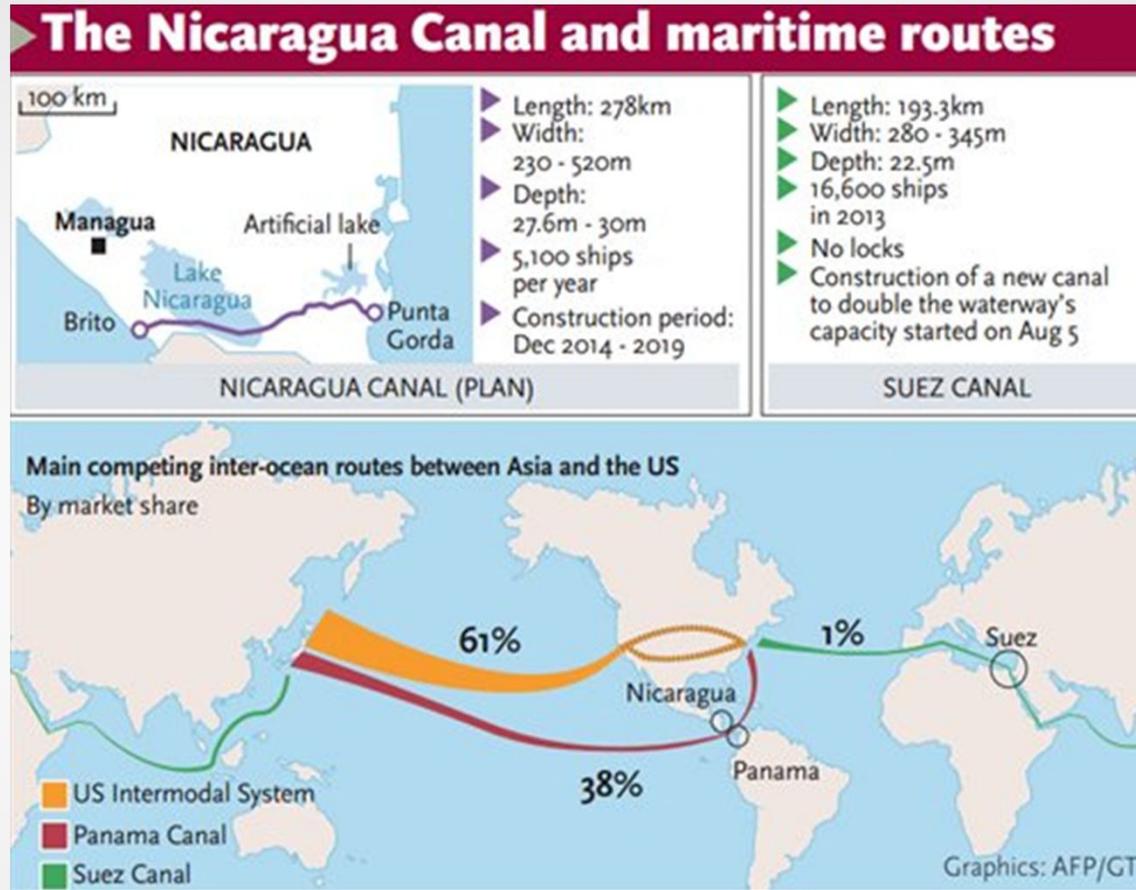
Lawmakers approved a controversial deal Thursday allowing a Hong Kong company to build a waterway to rival Panama Canal

- ▶ Cost: \$40 billion
- ▶ Construction: starts May 2014

	 Depth	 Length	 Draft
Nicaragua Canal	22 m	286 km	20 m
Panama Canal	21 m	82 km	12.3 m
Suez Canal	13.8 m	195 km	19 m



# La balanza geográfica del comercio



# RE-APERTURA DE LAS RUTAS NORTE-NORTE

# Tiempo de tránsito Shanghái - Norteamérica



# The cruise ship's planned route



# Redrawing the Map. As the ice melts, countries race to claim potential riches

**GOING, GOING ... GONE?** The Arctic ice cap is shrinking faster than ever measured before and could disappear entirely by the middle of this century

Minimum extent of Arctic sea ice:



**Treaty boundary**  
Countries have exclusive rights up to 200 nautical miles (230 miles, 370 km) from shore

**Potential boundary**  
Countries can claim up to 350 nautical miles (403 miles, 648 km) if the area proves to be a direct extension of the continental shelf

**New claim**  
Russia says it has geological evidence to prove that this vast area, which stretches all the way to the North Pole, is part of its continental structure

**REALIZING AN ANCIENT DREAM** For centuries, explorers sought an ice-free route to Asia. A thawed Arctic means shippers could cut transportation time dramatically

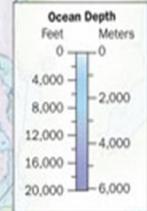
**New York City to Tokyo via Northwest Passage**  
8,700 miles (14,000 km)

**New York City to Tokyo via Panama Canal**  
11,300 miles (18,200 km)

**London to Tokyo via Northeast Passage**  
8,100 miles (13,000 km)

**London to Tokyo via Suez Canal**  
13,000 miles (20,900 km)

Sources: NOAA, USGS, NASA, University Corporation for Atmospheric Research, National Snow and Ice Data Center, U.S. Arctic Research Commission  
TIME Graphics by Joe Lertola and Jackson Dykman



# THE BIG CHILL



◀ Existing sea route from East Asia to Europe

As the ice melts, a new sea route, with tremendous consequences, is emerging



The Arctic ocean is part of the "GLOBAL COMMONS" but there is no treaty to check its exploitation

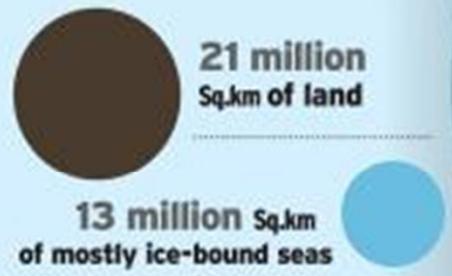
The region may hold over **40%** of the current global reserves of oil and gas. There may also be significant reserves of coal, zinc and silver

Now a tourist destination  
In 2010, over **50,000** tourists sailed the pristine waters of a hitherto forbidden zone

**Power lines**  
If the shipping routes through the Arctic become more dense, the countries that lie astride these routes, will gain in importance

The strategic chokepoints of the Panama Canal, the Suez Canal, the Bosphorous and the Malacca Straits, would lose much of their economic importance

## The Arctic Circle encloses



**India's total land area**  
● **3.3 million Sq.km**

## Nations claiming territory around the Arctic Ocean

- | THE U.S. | CANADA | DENMARK | NORWAY | RUSSIA

WORLDWIDE POSTAL SERVICES



# Natural resources in the Arctic

The territories, continental shelves and exclusive economic zones of eight countries exist within the Arctic: Russia (largest Arctic border), Canada, the United States (Alaska), Norway, Denmark (Greenland and the Faroe Islands), Finland, Sweden and Iceland

The icebound Arctic region contains the following natural resources:

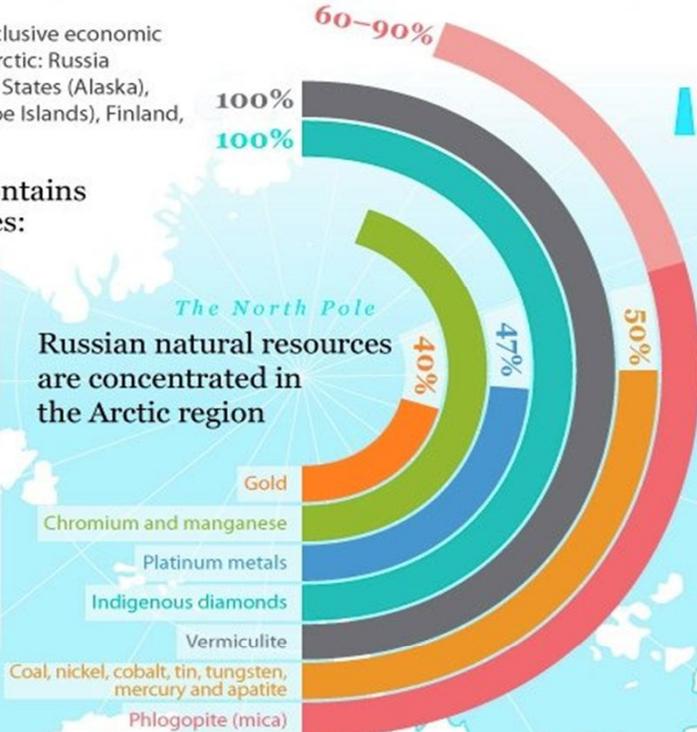
- About **83 billion** barrels of crude oil\* (About 10 billion metric tons)
- About **1.55 quadrillion** cubic meters of natural gas\*\*

Over 200 promising oil and gas deposits have been located in the Barents, Pechora and Kara Seas, and several dozen fields have been discovered

**The Barents Sea Shelf, including the Pechora Shelf:** Four oil deposits, one oil and gas-condensate deposit, three gas-condensate deposits and three gas deposits

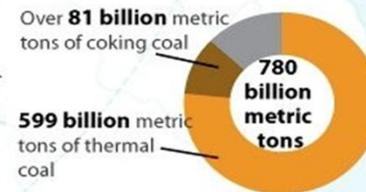
**The Kara Sea Shelf, including the Taz Estuary and the Gulf of Ob:** Two oil and gas-condensate deposits, two gas-condensate deposits and seven gas deposits

Russian natural resources are concentrated in the Arctic region



Unique mineral deposits are located on Russia's mainland in the Arctic areas

Total estimated coal-deposit resources



**The Okhotsk Sea Shelf:** One oil deposit, five oil and gas-condensate deposits, one gas-condensate deposit and one gas deposit

The Arctic Circle

The North Pole

\*Most of the unexplored oil deposits are located off the coast of **Alaska**

\*\*Virtually all the Arctic natural gas deposits are located off the **Russian coast**

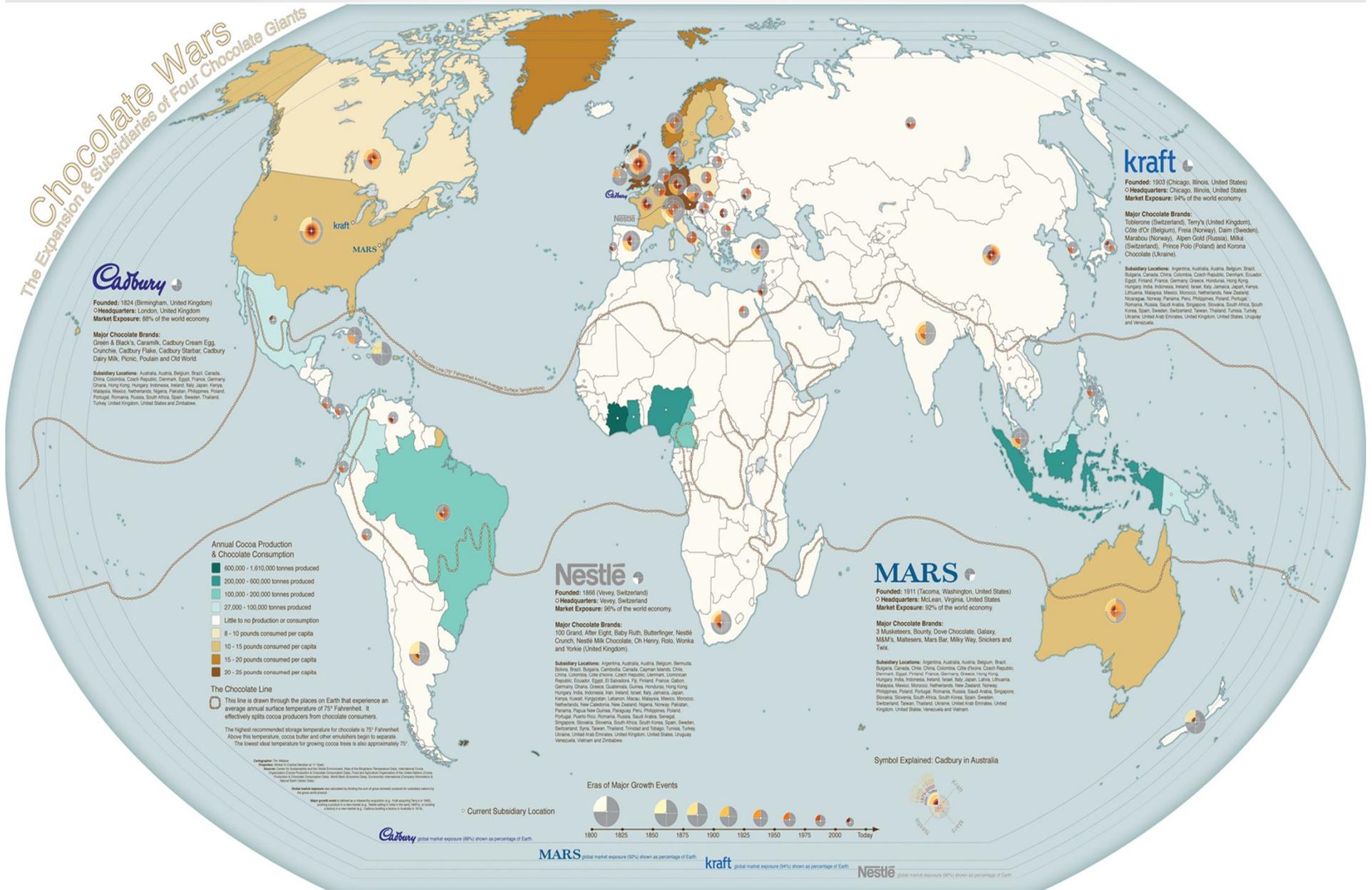
Symbols for mineral resources

- ▼ Nickel ores
- Copper ores
- ◆ Titanium ores
- ⊠ Chromite ores
- ▲ Iron ores
- ▼ Manganese ores
- Gold
- ⊗ Silver
- ★ Platinum
- ◆ Molybdenum
- Aluminum ores
- Mercury ores
- Tin ores
- ⊗ Polymetal ores
- Phosphorites
- Apatites
- ★ Diamonds
- Bituminous/Black coal
- ▲ Oil
- ▲ Natural gas
- ▲ Unexplored oil and natural gas deposits

**FINALMENTE...**

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# ¿Por qué nos debe interesar este tema?



# COLOMBIA COMERCIA CON EL MUNDO

Volumen de comercio  
**251,5**  
millones de toneladas



## ¿Por qué es importante para Colombia?

En 20 años Colombia podrá estar exportando una suma cercana a los

# US\$250.000 millones

¡GRACIAS!

**Ricardo A. Moreno R.**

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