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Nuevos escenarios en el Transporte Internacional de Mercaderías

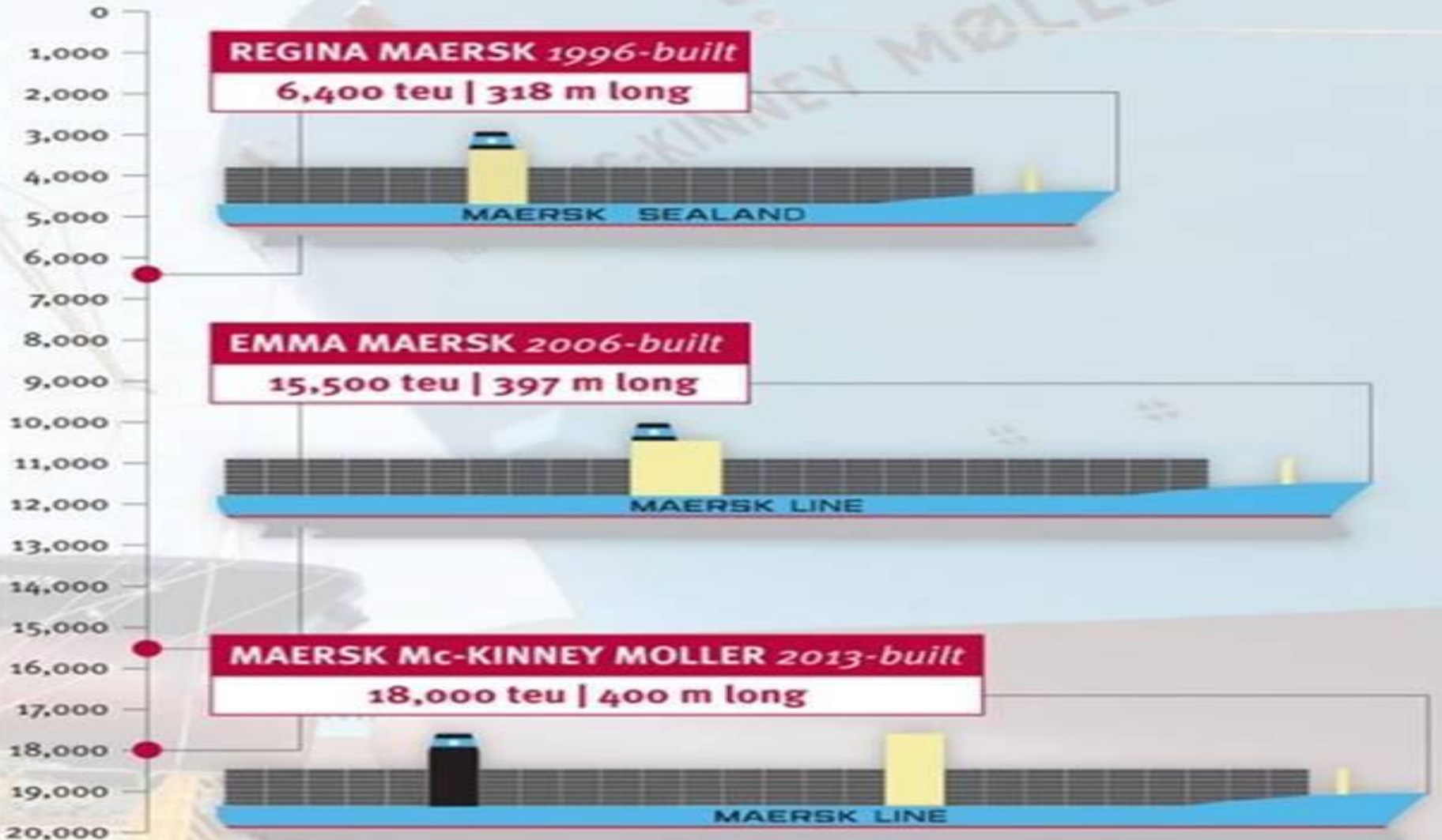
Contextualización



Comparación Grandes Buques

MAERSK PIONEERING SHIP DESIGNS

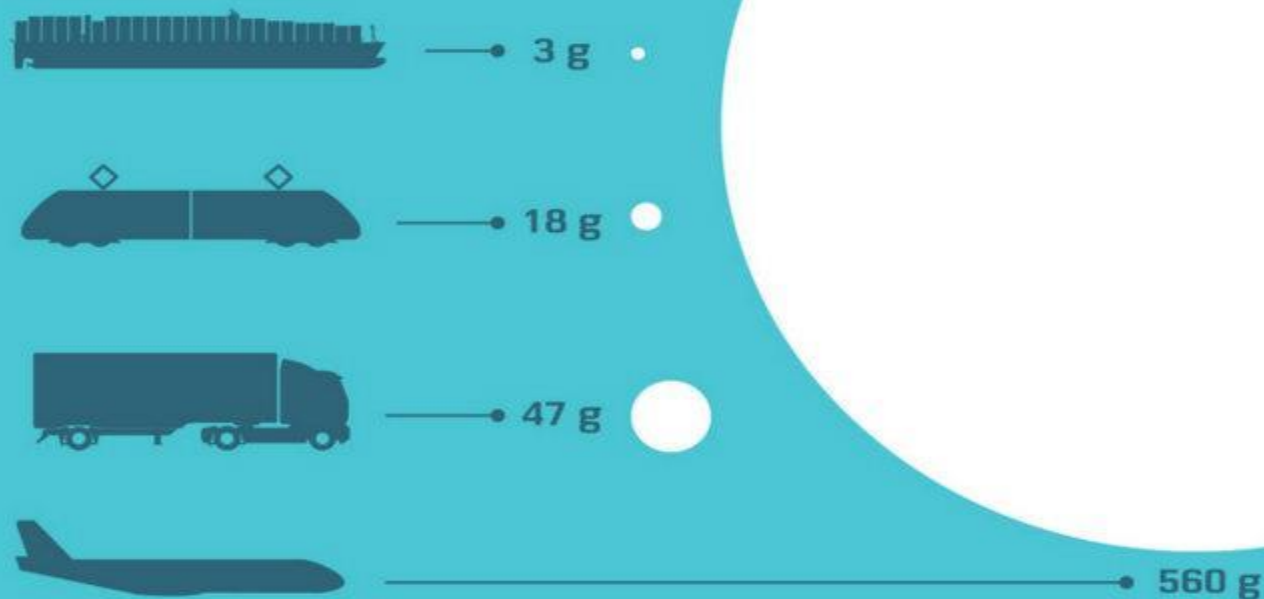
teu



Smart transport

Different modes of transport have different climate impact. Carbon distance reflects the difference in climate impact among different modes of transport between two locations.

Grams of CO₂ emitted by transporting **1 ton** of goods **1 km**




www.worldslargestship.com

 **MAERSK**
LINE

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Reglas para prevenir contaminación por:

- **Anexo I:** Hidrocarburos.
- **Anexo II:** Sustancias nocivas líquidas transportadas a granel.
- **Anexo III:** Sustancias perjudiciales transportadas en bultos.
- **Anexo IV:** Aguas sucias de los buques.
- **Anexo V:** Las basuras de los buques.
- **Anexo VI:** Contaminación atmosférica por buques.

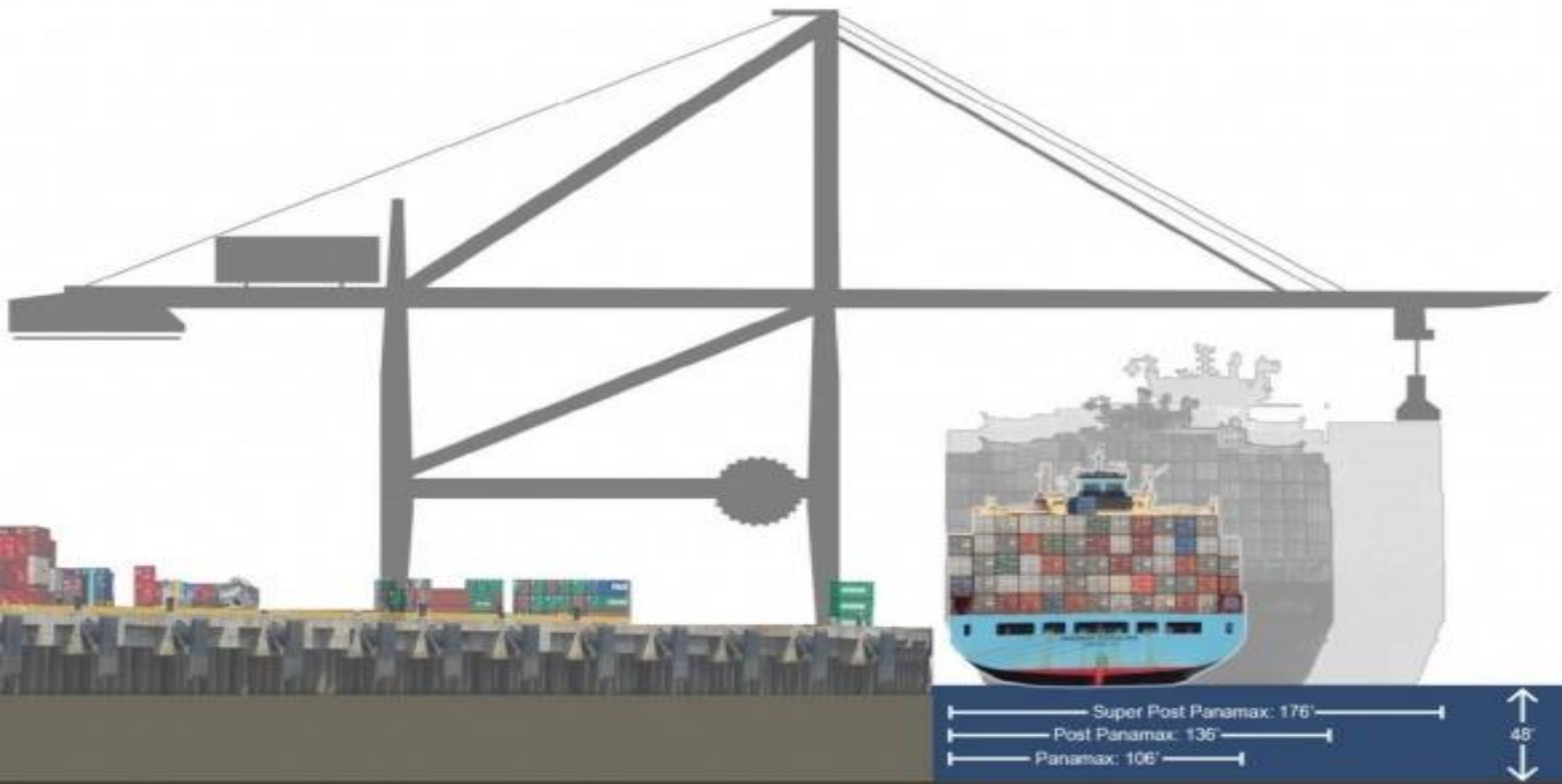


Su objetivo es preservar el ambiente marino mediante la completa eliminación de la polución por hidrocarburos y otras sustancias dañinas, así como la minimización de las posibles descargas accidentales

Fuente: La respuesta de la OMI a los retos ambientales, 2007. (Doc : J/9536)

Solicite esta presentación en: lmeridag@gmail.com

Comparación Panamax vs. Post-Panamax vs. Super Post-Panamax



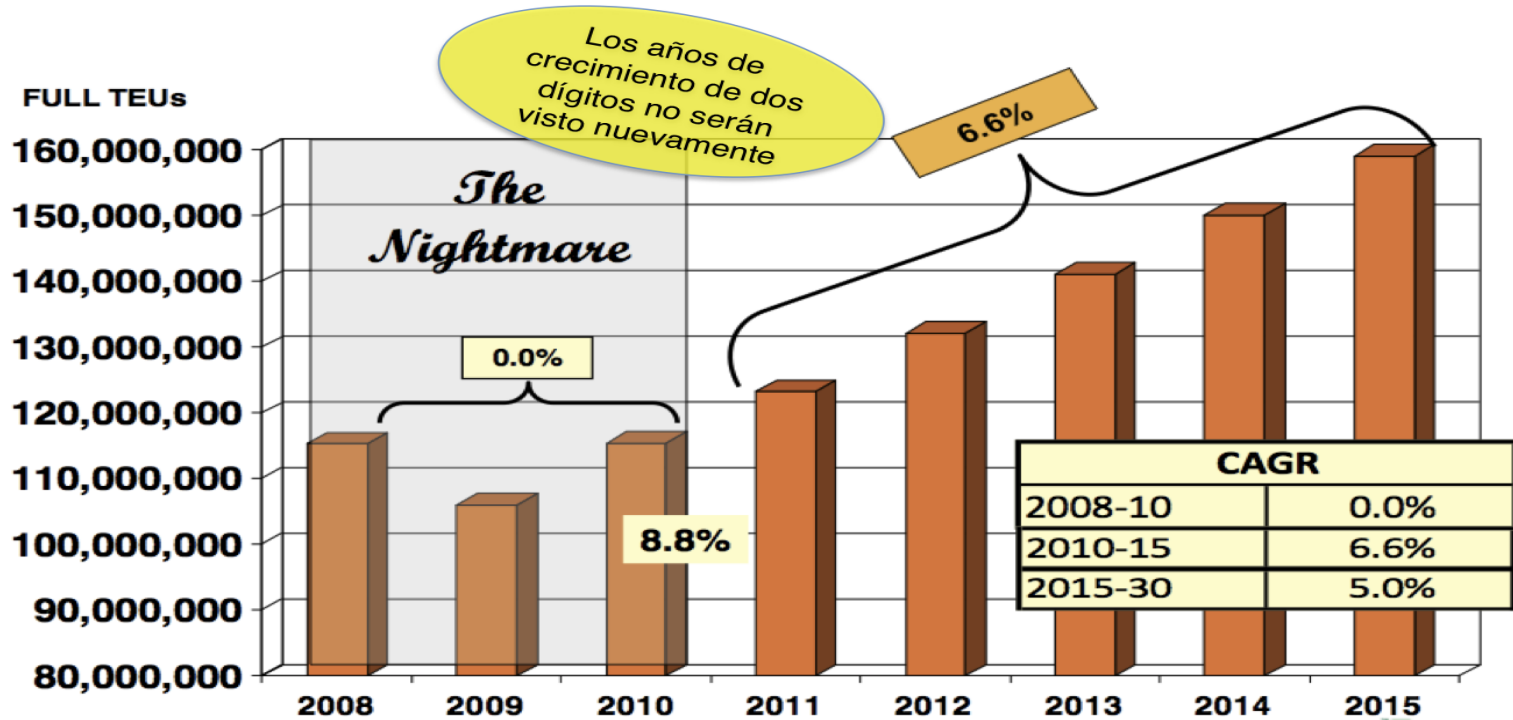
¿Qué pasa hoy en el Negocio?



Perspectivas del T.M. Global



Capacidad mundial de TEUs

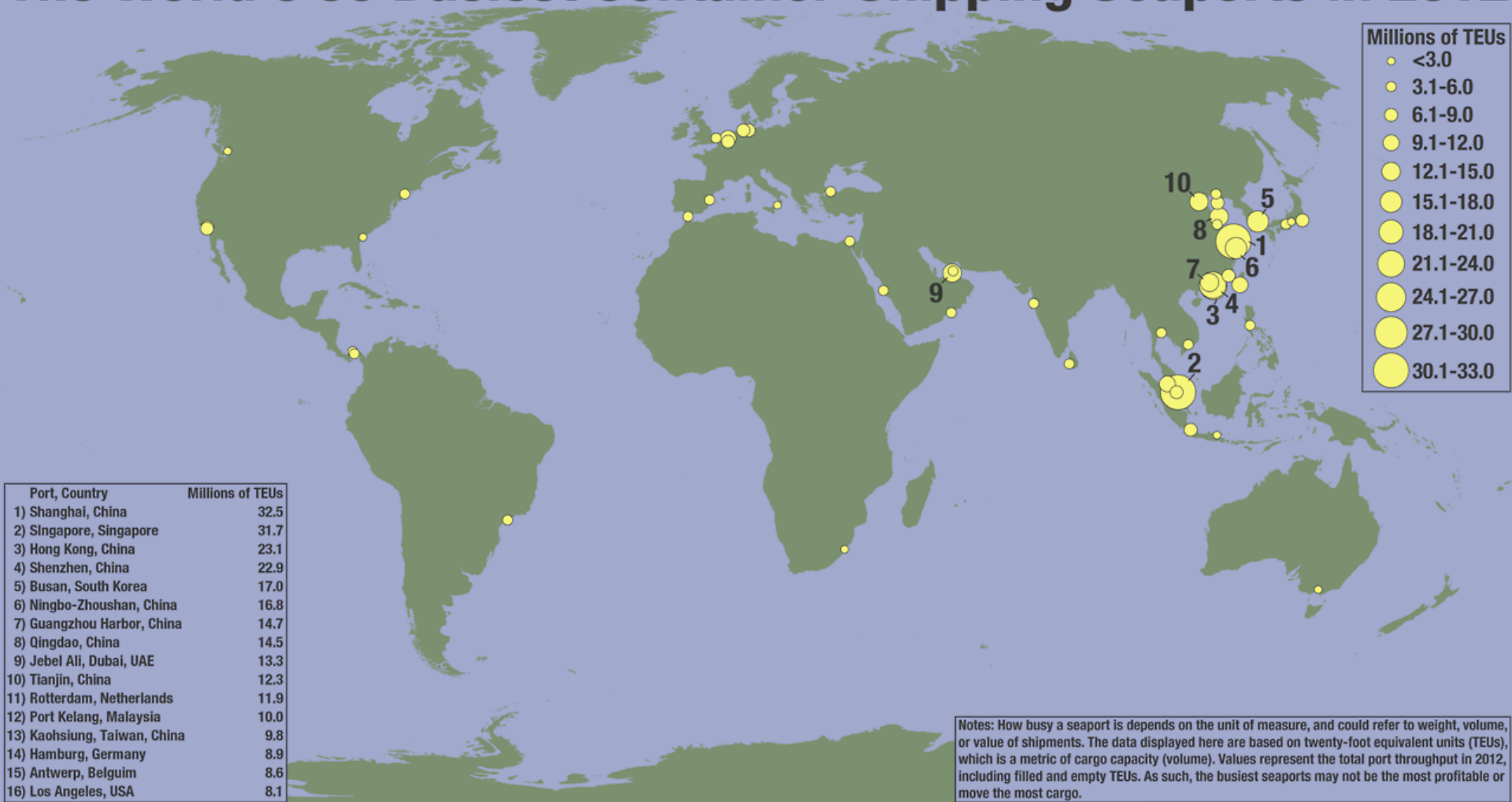


Fuente: Robert West, WorleyParsons group/ AAPA spring conference/March 22, 2011/WDC,USA.

imeridag@gmail.com / Twitter: @singladuras

Comercio Mundial de Contenedores (Base TEU)

The World's 50 Busiest Container-Shipping Seaports in 2012



Los mega-buques



© C. Costa - www.oceanships.de

18.000 TEU x20

= 360.000 TEU

≈  3.640.000.000 million iPads

Maersk Triple E Class - MMM

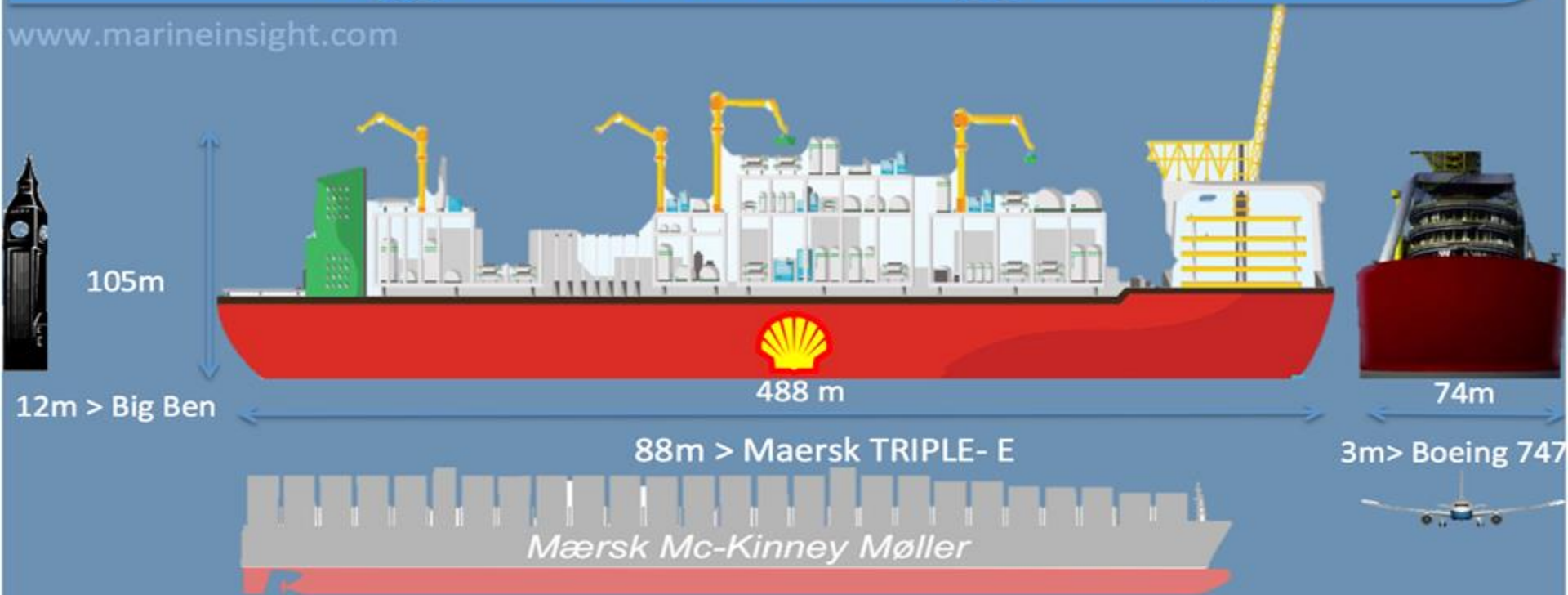
Los mega-buques

Shell's Prelude FLNG

marine insight

Bigger Than World's Biggest Ship

www.marineinsight.com



PRODUCTION



300-350 crew members working in shifts



3.6 million metric tons /annum LNG Production capacity

WHERE?

475 KM

The distance of the ship's working location from the nearest coast of Western Australia

25 years

Approx. Time the Facility would be moored in one location

FACTS



5 Soccer Fields back to back = Ship's Deck Area

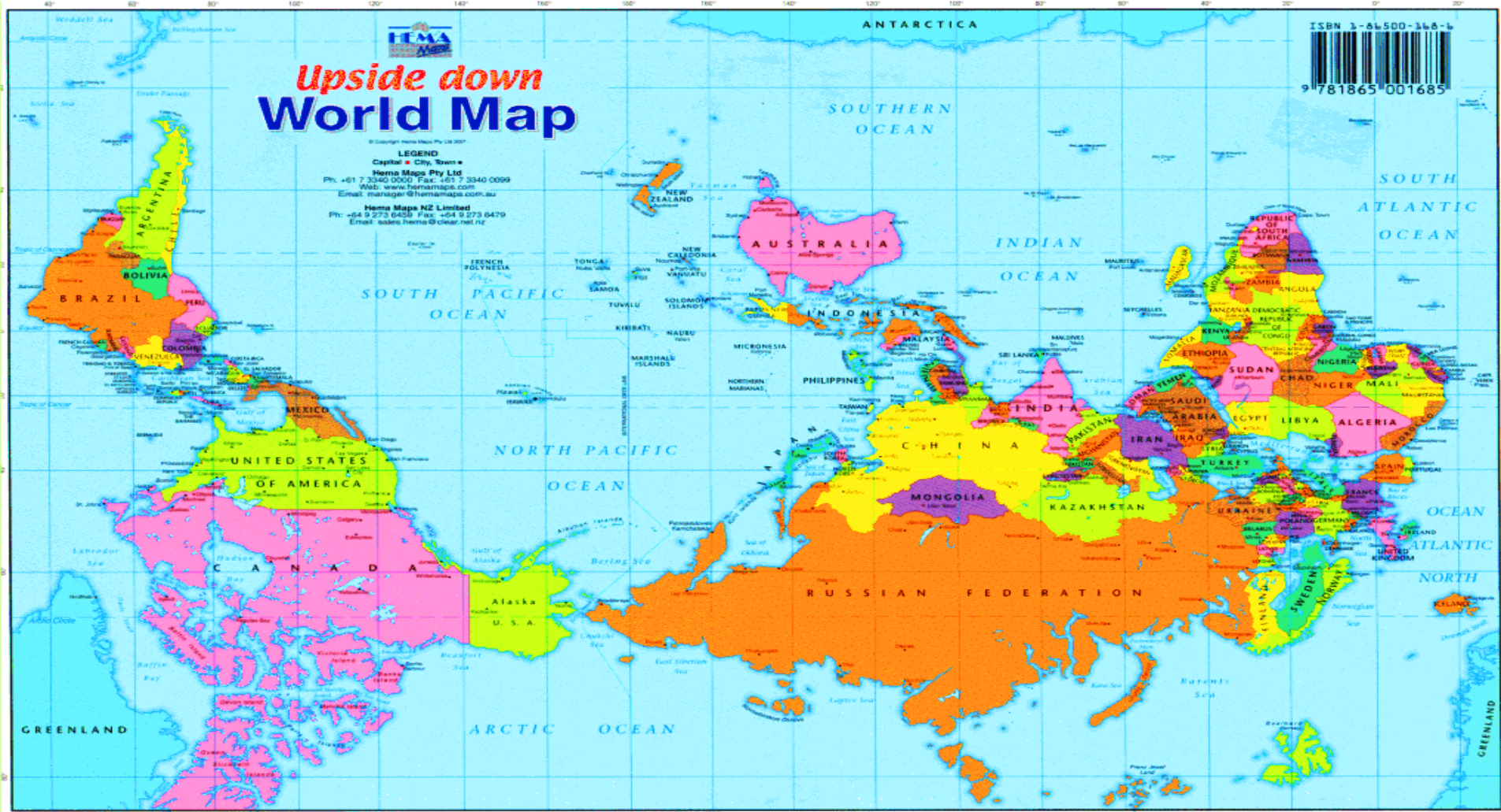


50 million ltrs. Water /hour to be used for cooling LNG

¿Qué pasó antes
para entender que
pasará mañana?



¿Y esto qué es?

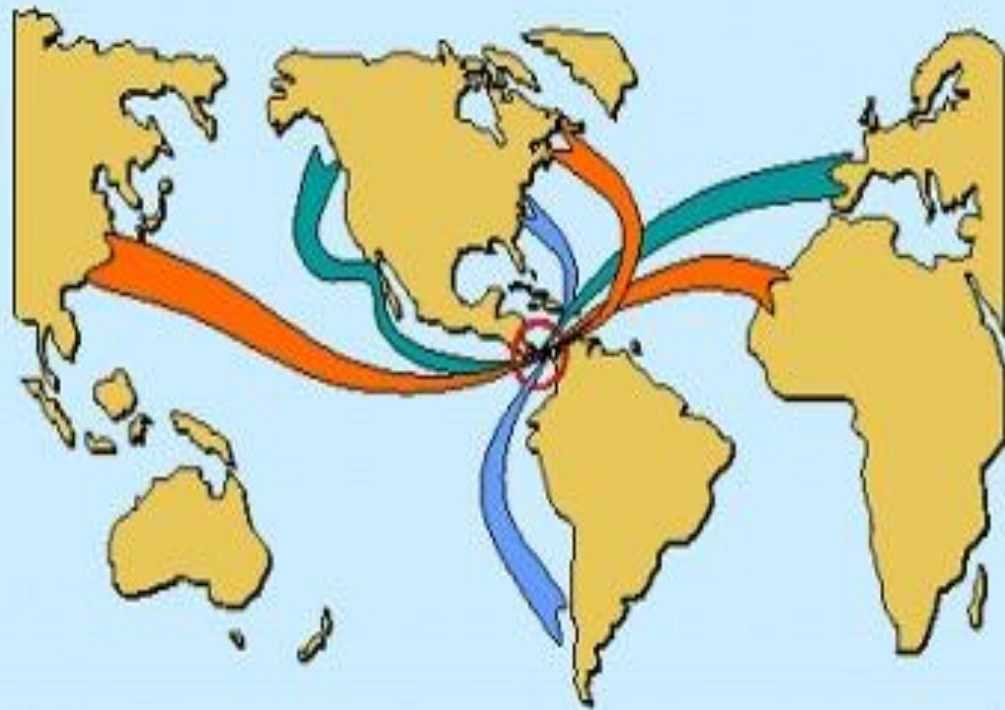


Puntos estratégicos y neurálgicos

IMPORTANCIA ESTRATÉGICA DEL CANAL DE SUEZ



Panamá, 500 años al servicio del mundo



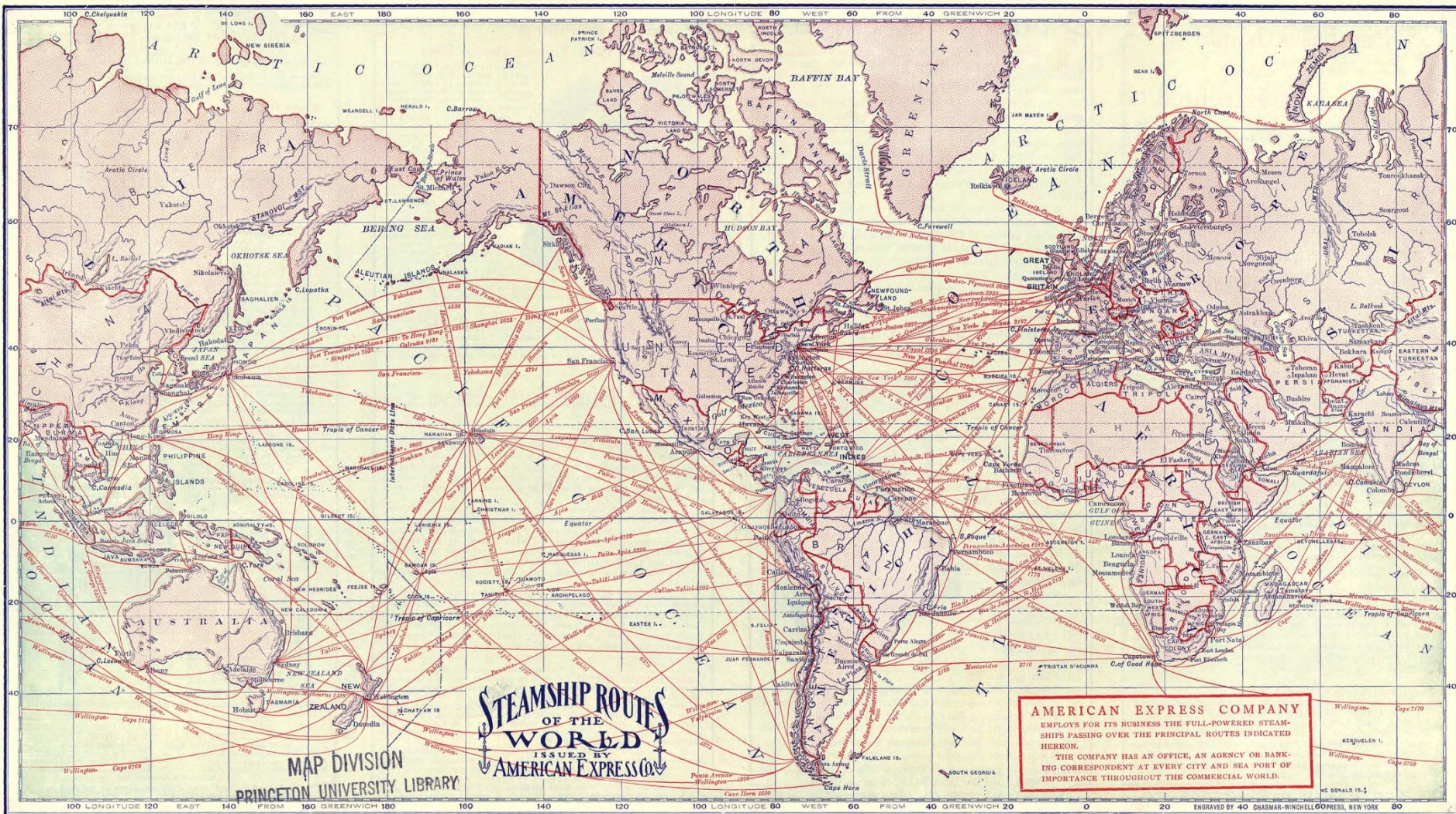
Un poco de historia



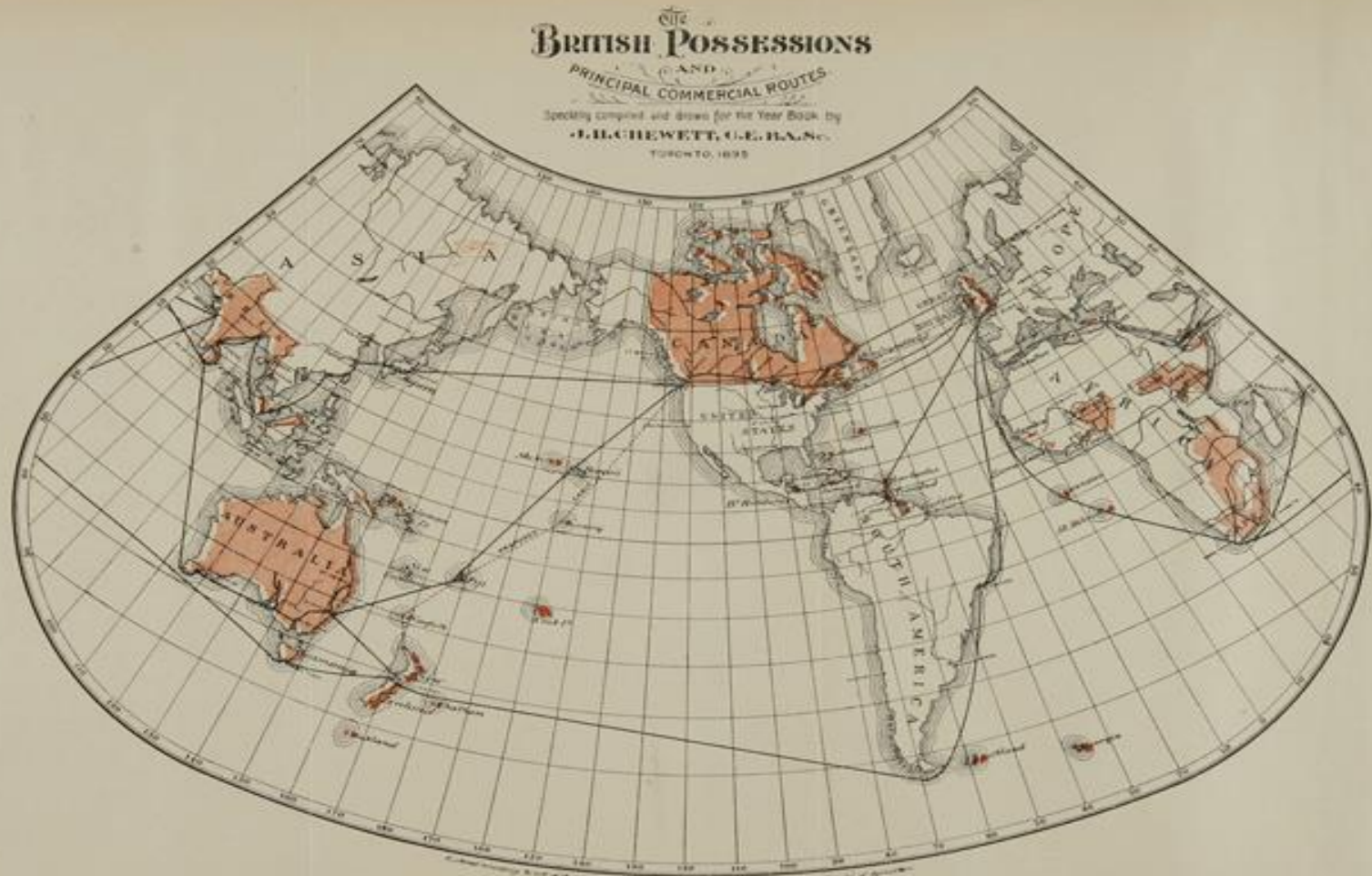
Inicios del transporte marítimo



Inicios del transporte marítimo

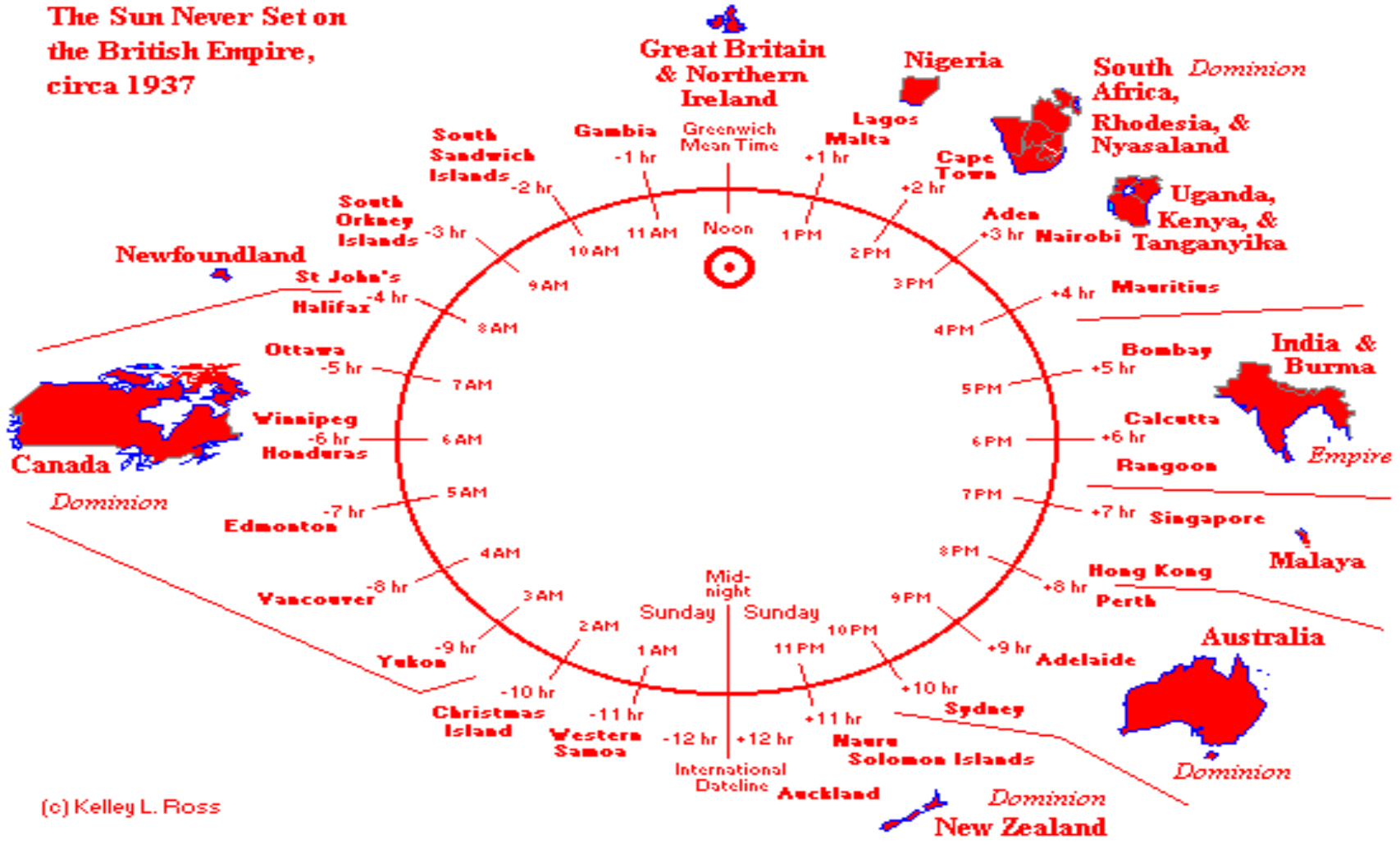


Importancia Geopolítica



Importancia Geopolítica

The Sun Never Set on the British Empire, circa 1937



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Situación en torno al Estrecho de Ormuz

EEUU y Gran Bretaña amplían su presencia militar en la zona tras la amenaza iraní de cerrar el Estrecho de Ormuz



Estrecho de Ormuz

Hasta un 40% del tráfico marítimo del crudo pasa por el Estrecho de Ormuz



- 1 - buques que se encuentran en zona de tensión
- 1 - buques que navegan hacia zona de tensión

1  Grupo de portaaviones de combate Nº1

Portaaviones "Carl Vinson"

8 escuadrones de aviación embarcada

Crucero de misiles "Bunker Hill"

Destructor de misiles "Halsey"

Escuadrón de cinco destructores

2  Grupo de portaaviones de combate Nº3

Portaaviones "John C. Stennis"

9 escuadrones de aviación embarcada

Crucero de misiles "Antietam"

Escuadrón de cinco destructores

3  Grupo de asalto anfibio

Portahelicópteros de asalto anfibio WASP "Makin Island"

Escuadrilla de helicópteros

Plataforma anfibia LPD "New Orleans"

Dique de desembarco "Pearl Harbor"

4  Armada británica

Fragata "Somerset"

4 dragaminas

Buque hidrográfico

3 buques de aprovisionamiento

1  Armada británica

Destructor "Daring"

2  Grupo de portaaviones de combate Nº9

Portaaviones "Abraham Lincoln"

9 escuadrones de aviación embarcada

Crucero de misiles "Cape St. George"

Escuadrón de 7 destructores

¿Y entonces...cuál es el futuro?



El futuro de los Buques

How to Make the Ultimate GREEN SHIP ?

Kite-Sail System
Can Reduce Fuel Consumption by 20-40 % Annually



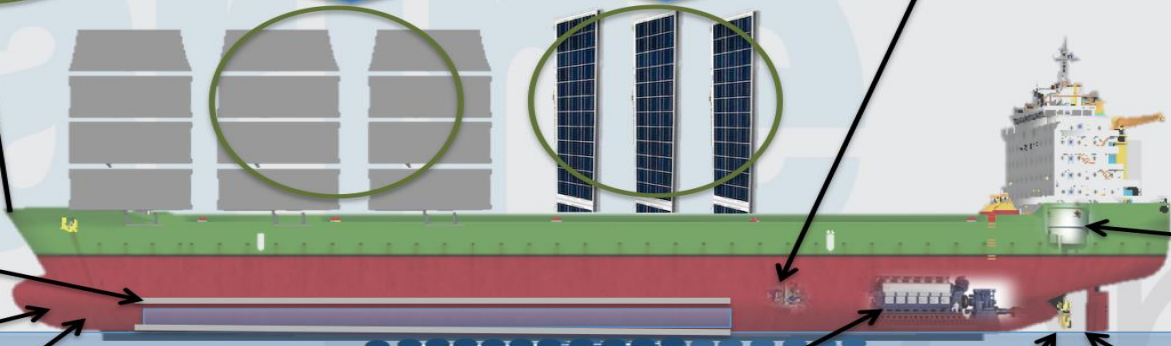
Rig-Sail System
This Hybrid System Can Save Fuel up to 30%

Solar-Sail System
This Hybrid System Can Save Fuel up to 20%

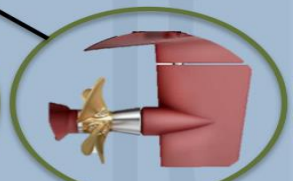
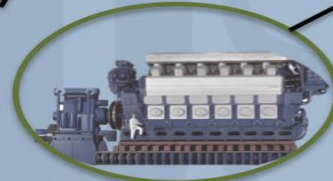
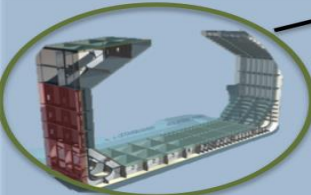
Optimized Cooling System
Can Save 25% of electricity, Fuel Saving 1.5%



No Ballast Ship
Longitudinal Water Trunk does Not carry Ballast Water



Exhaust Scrubber
Sox emission reduced by 98%



Sandwich Plate System
Helpful in Green Recycling of Ships

Improved Hull Paints
Reduces Friction, Fuel Saving Up to 8%

Air Bubbles Hull Lubrication
Reduces Friction, Increases Speed, Fuel Saving Up to 10%

Green Propulsion
"Dual Fuel Engines"
"Water in Fuel"
"Exhaust Gas Recirculation"
"Fuel Cell Technology".
Reduces SOx upto 100%
NOx up to 35%

Speed Nozzle
Increases efficiency at higher speed. Fuel Saving Up to 5%

Advance Rudder & Propeller
New design can save fuel up to 4%

El futuro de los Buques

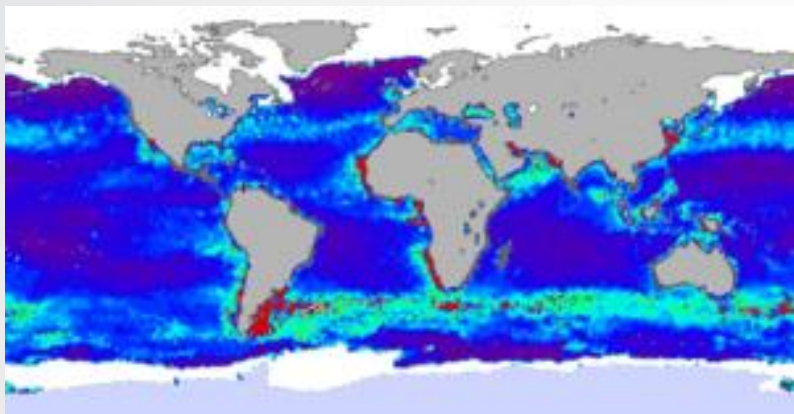


Dual-fuel short-sea ships
ordered by **Containerships Ltd Oy**, **GNS Shipping/Nordic Hamburg**,
and **ARKON Shipping**

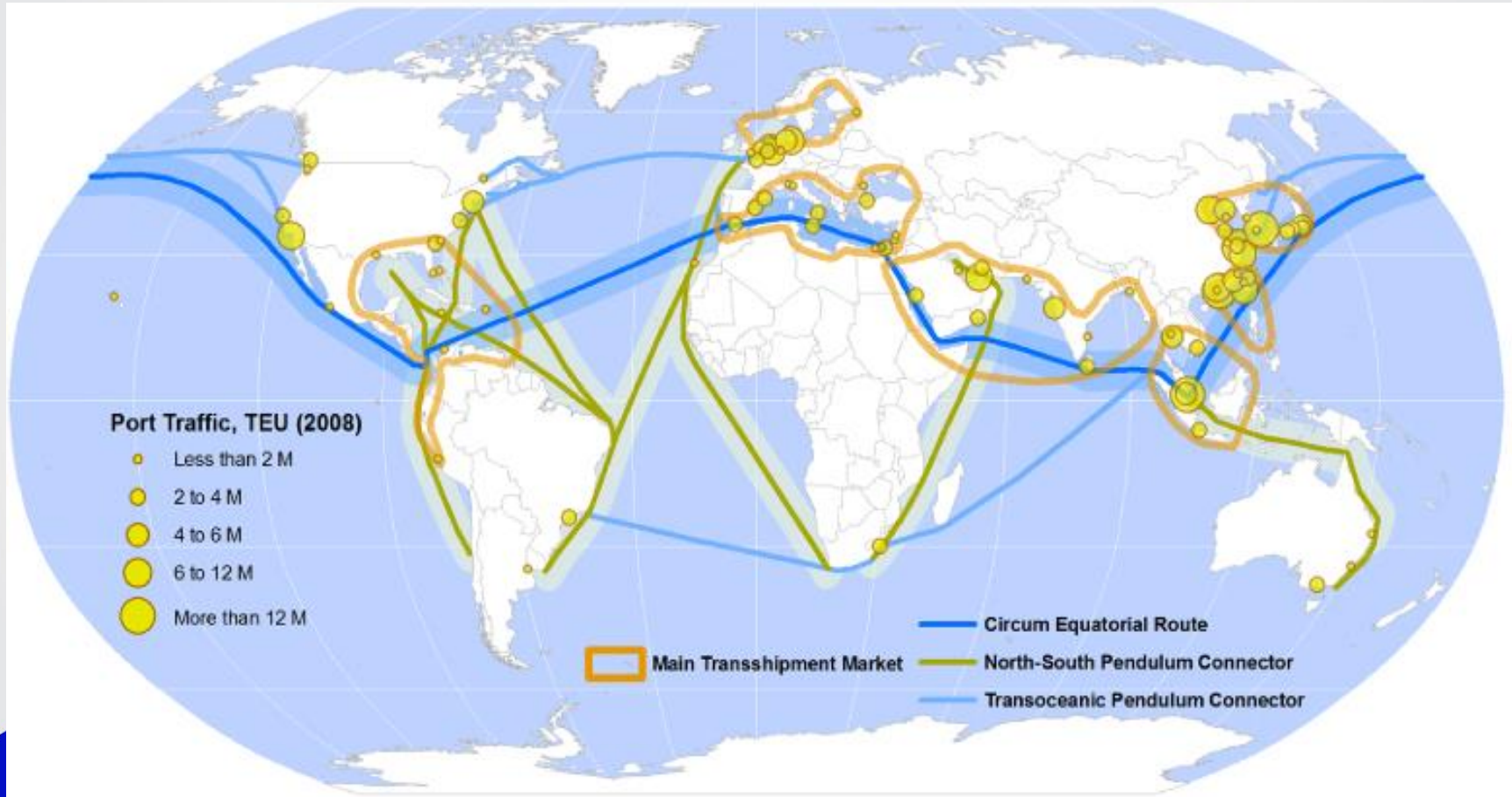
El futuro de los Buques



Rutas

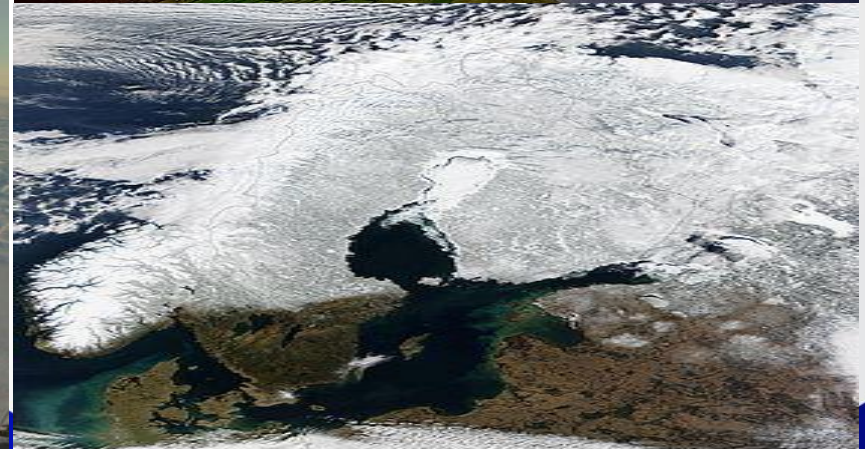
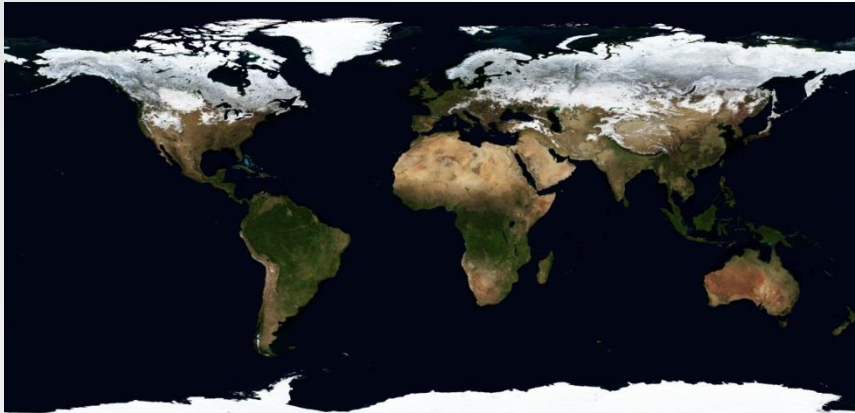


Rutas



Emerging Global Maritime Freight Transport System

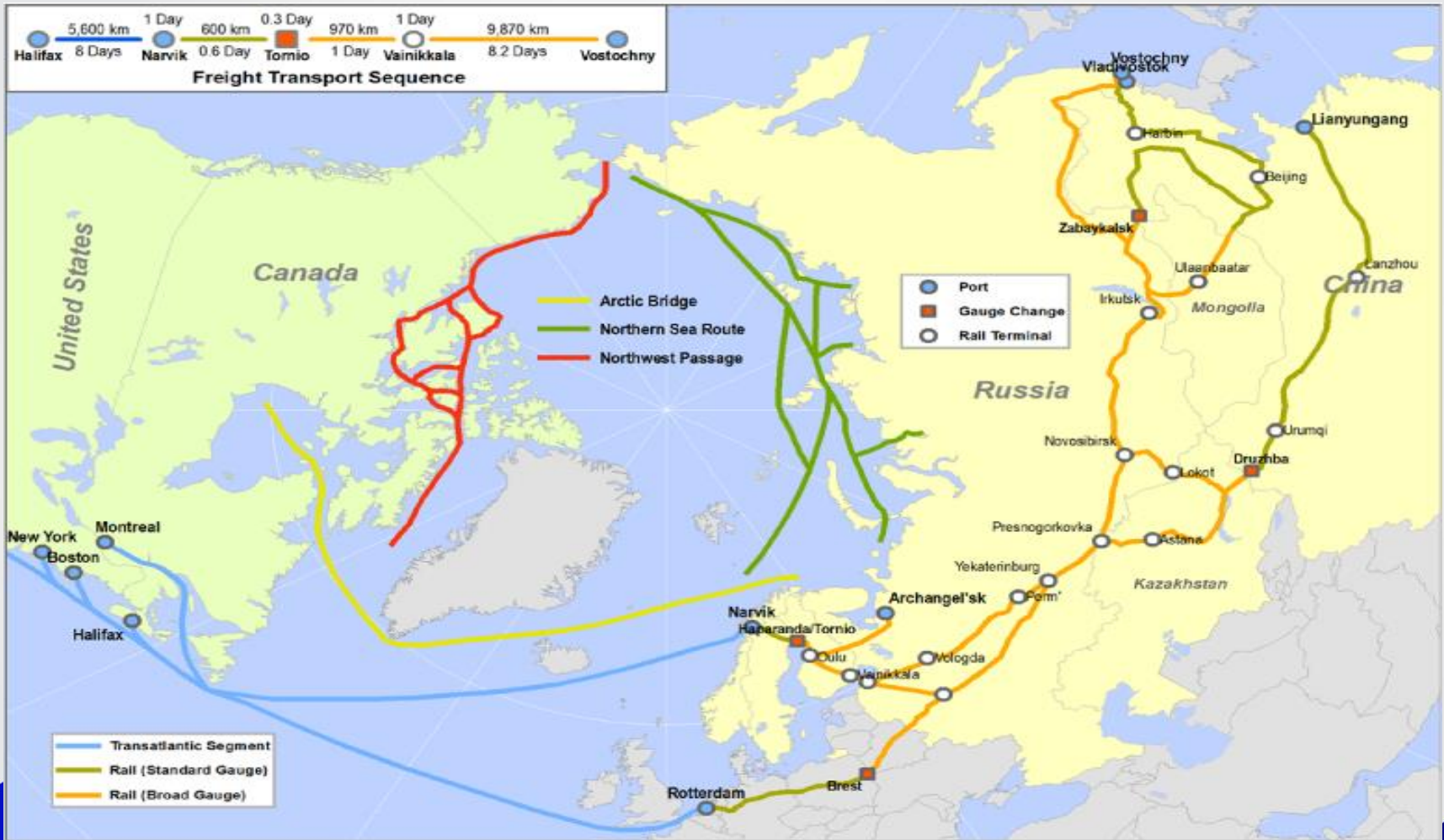
Rutas - Norte Norte



Rutas



Rutas

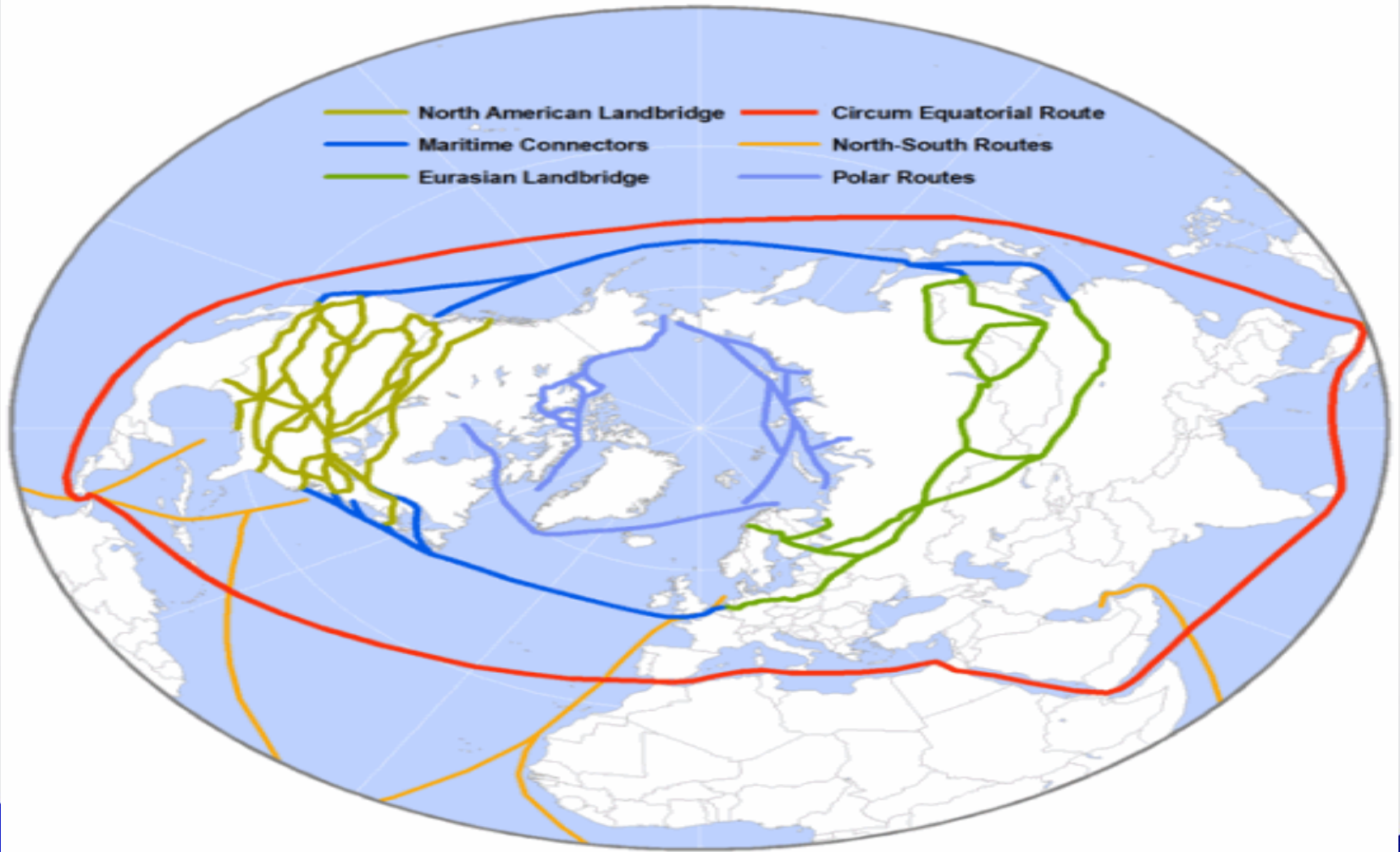


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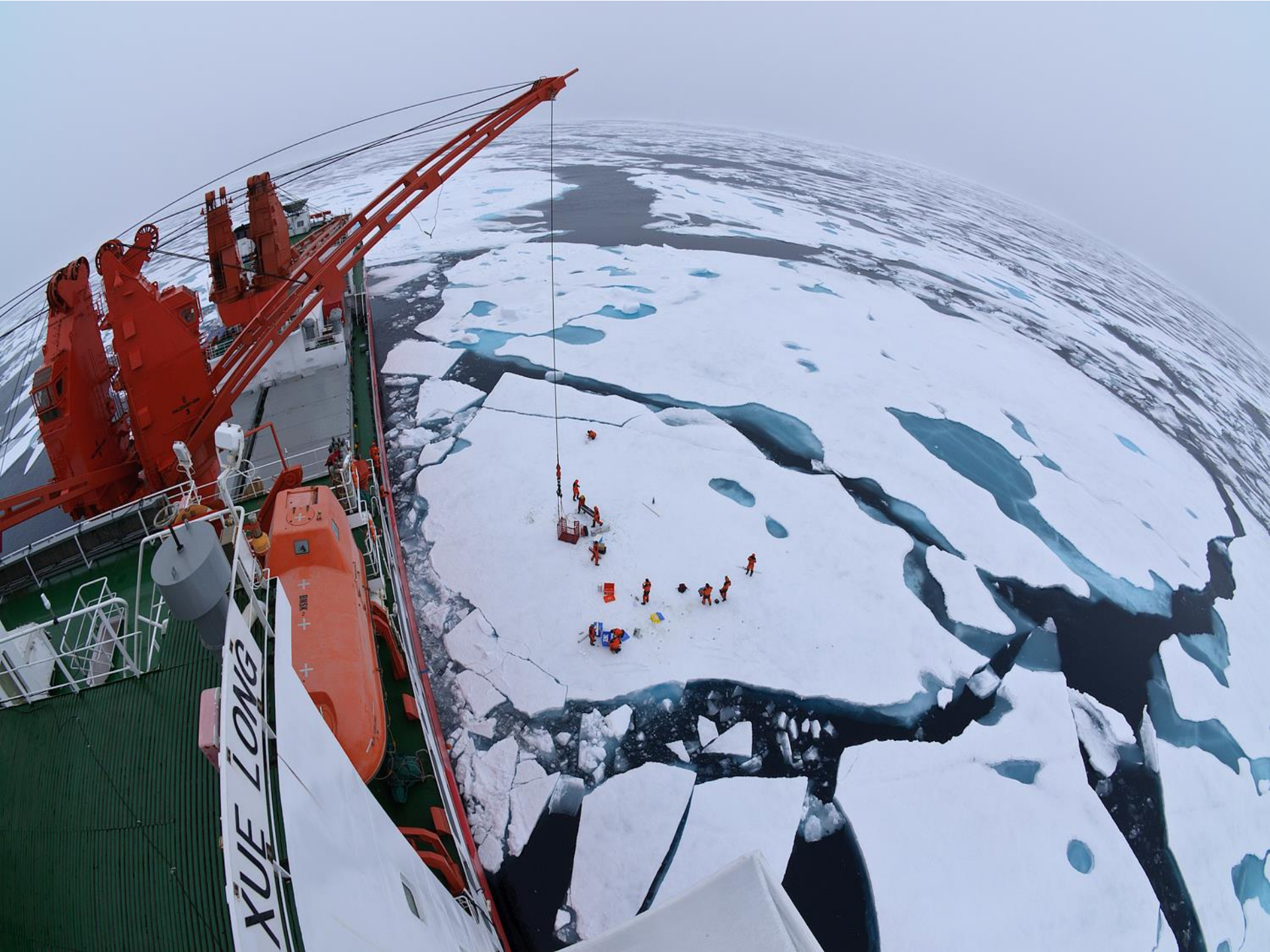
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The Northern East-West Freight Corridor (Eurasian Landbridge)

Rutas

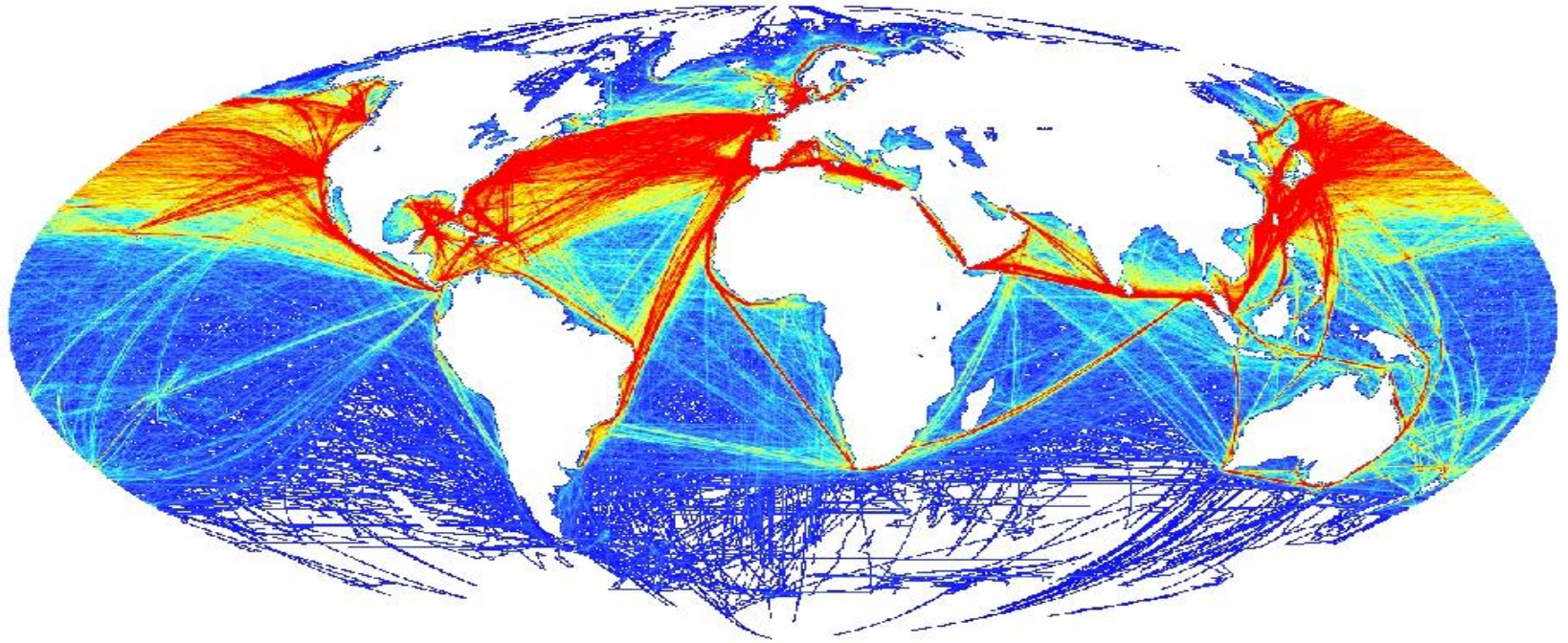


Circum-Hemispheric Rings of Circulation



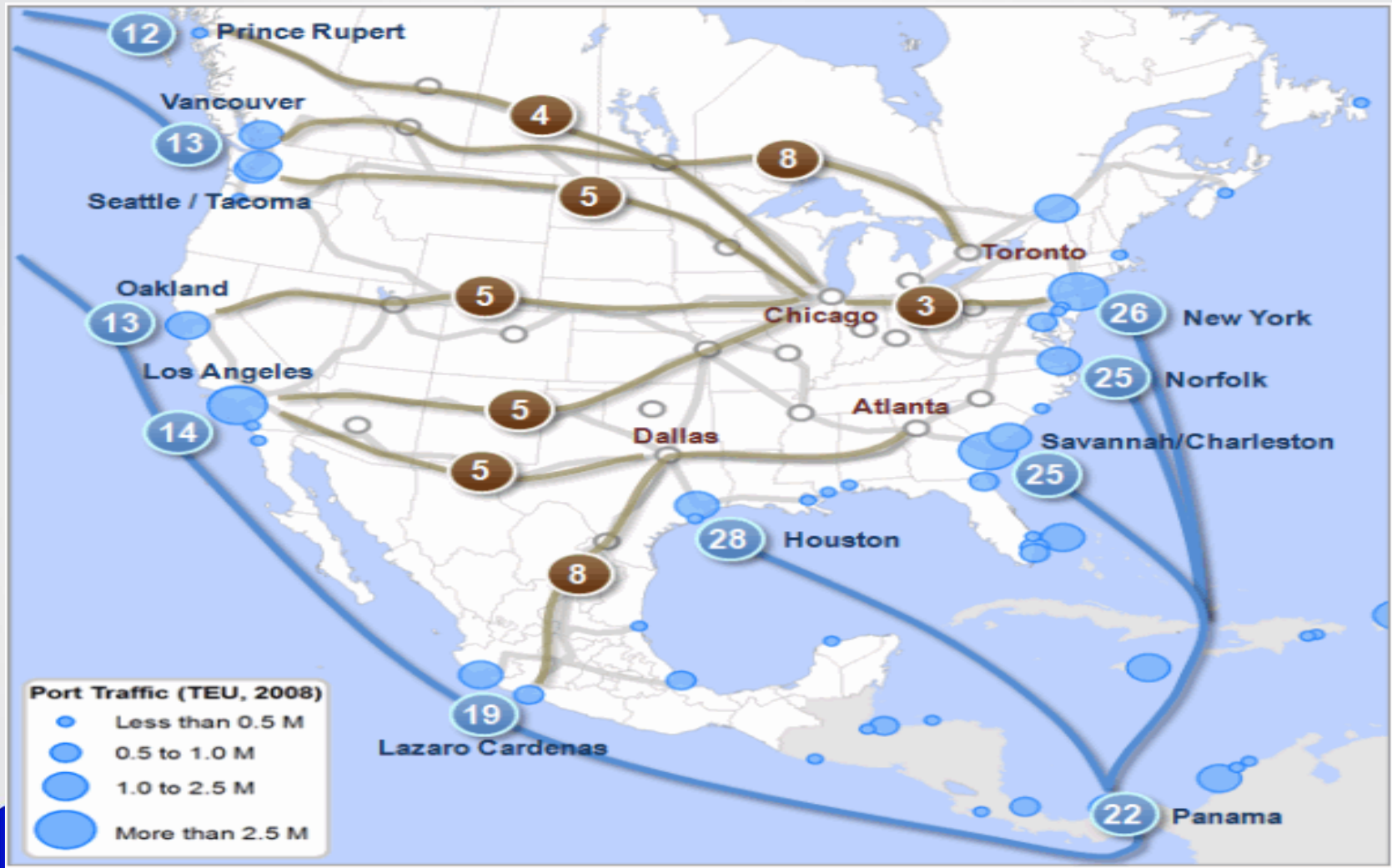
XUE LONG

Rutas - Densidad



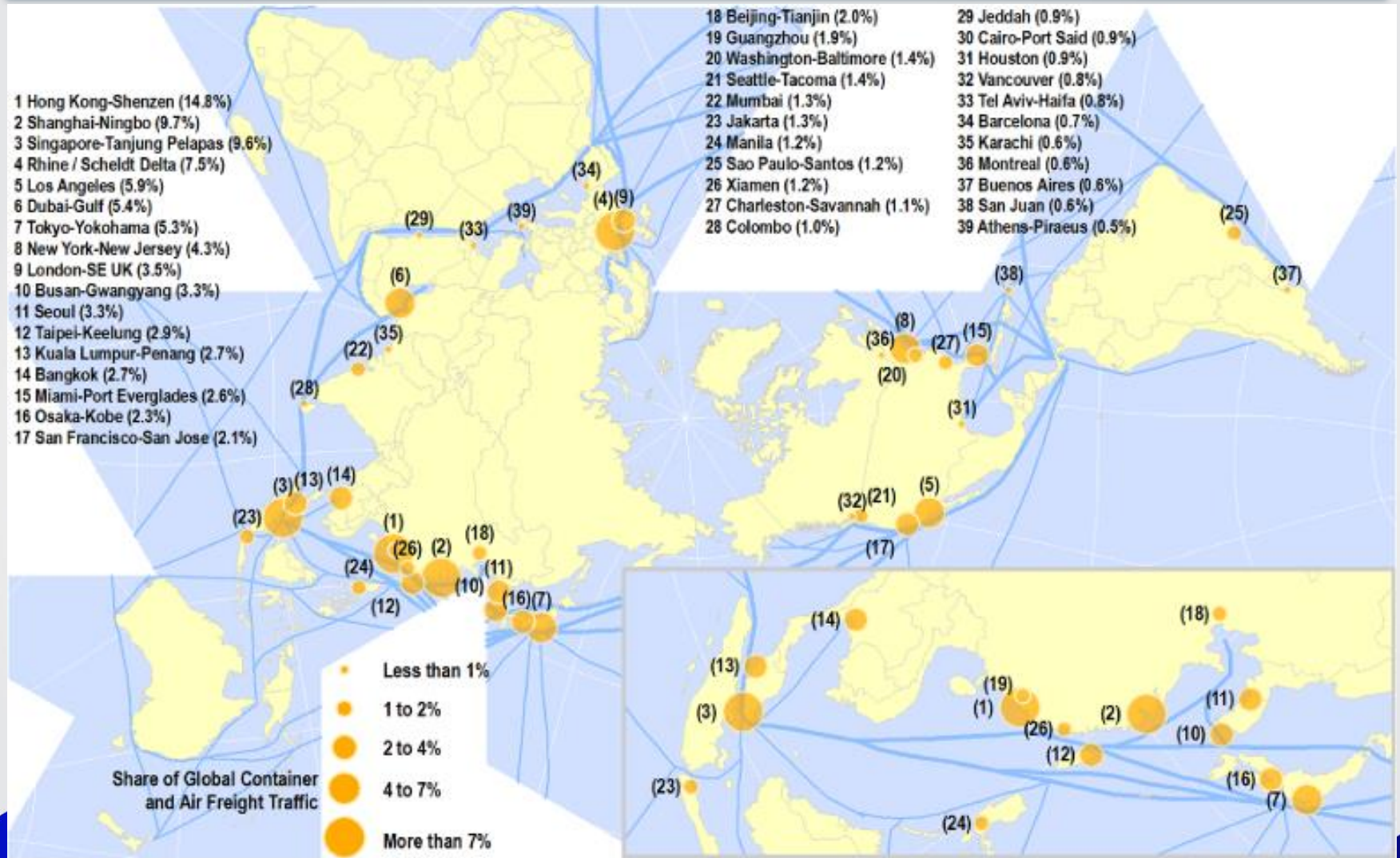
Autopistas del Mar

Rutas



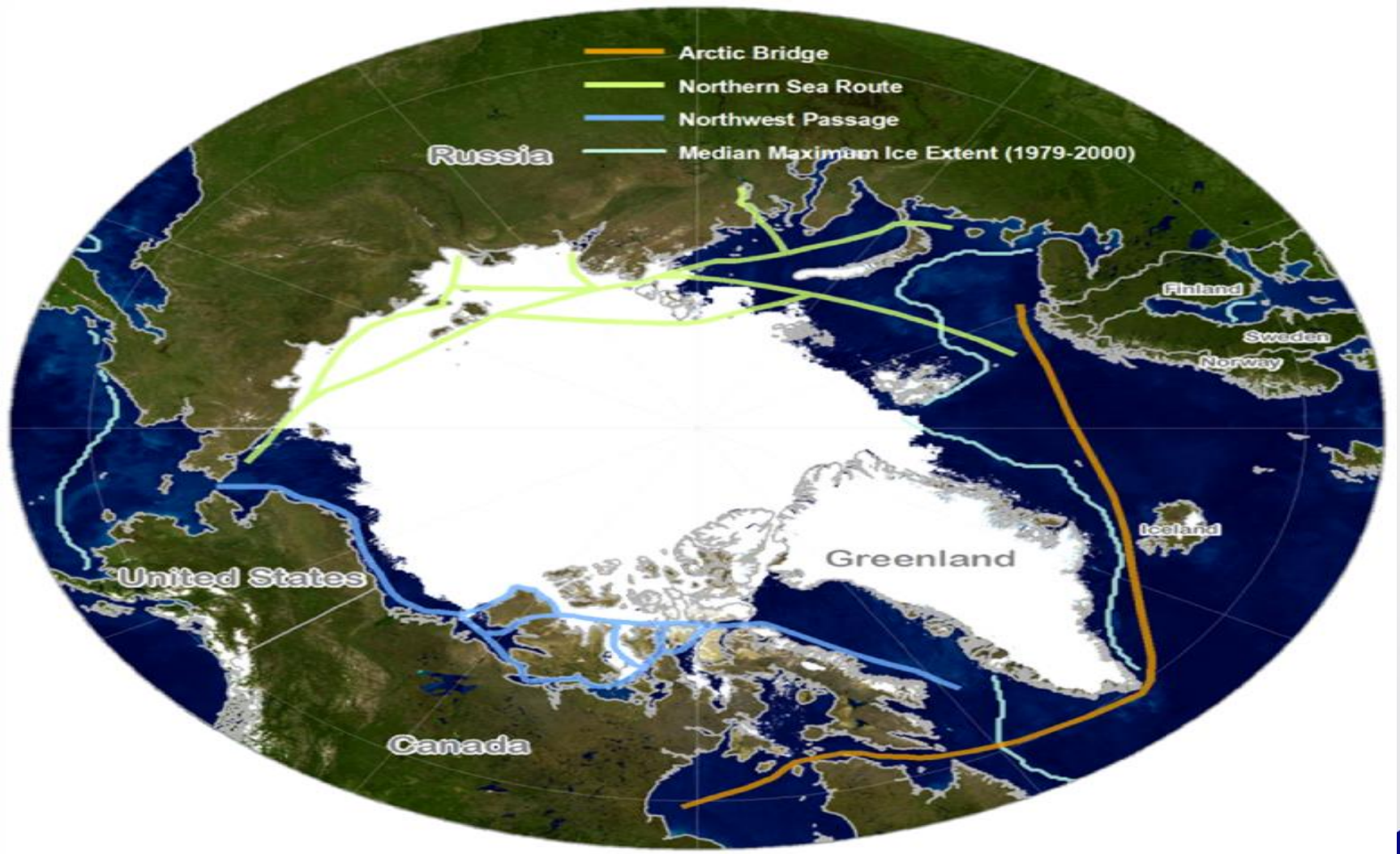
Tiempo de tránsito Shanghai
- América del Norte (días)

Rutas

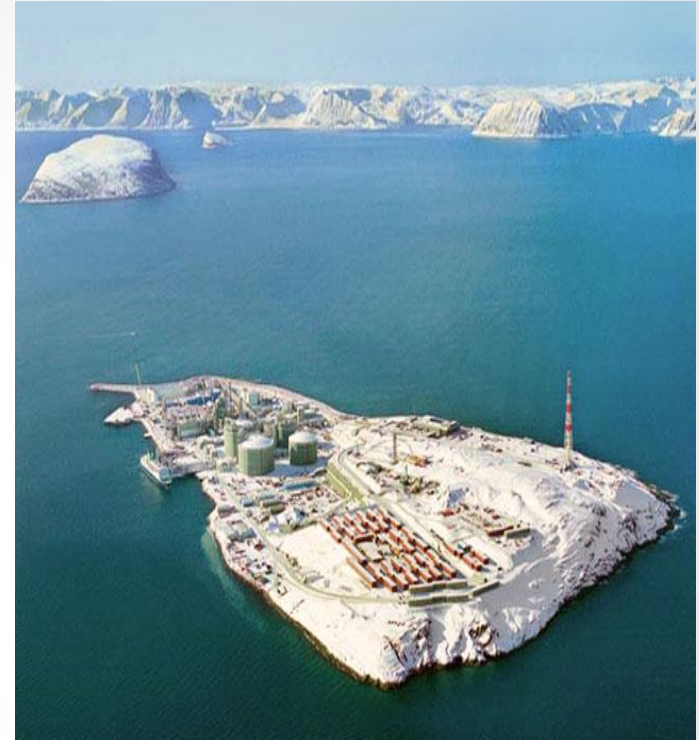


Majors Gateways in the World

Rutas Polares



Rutas

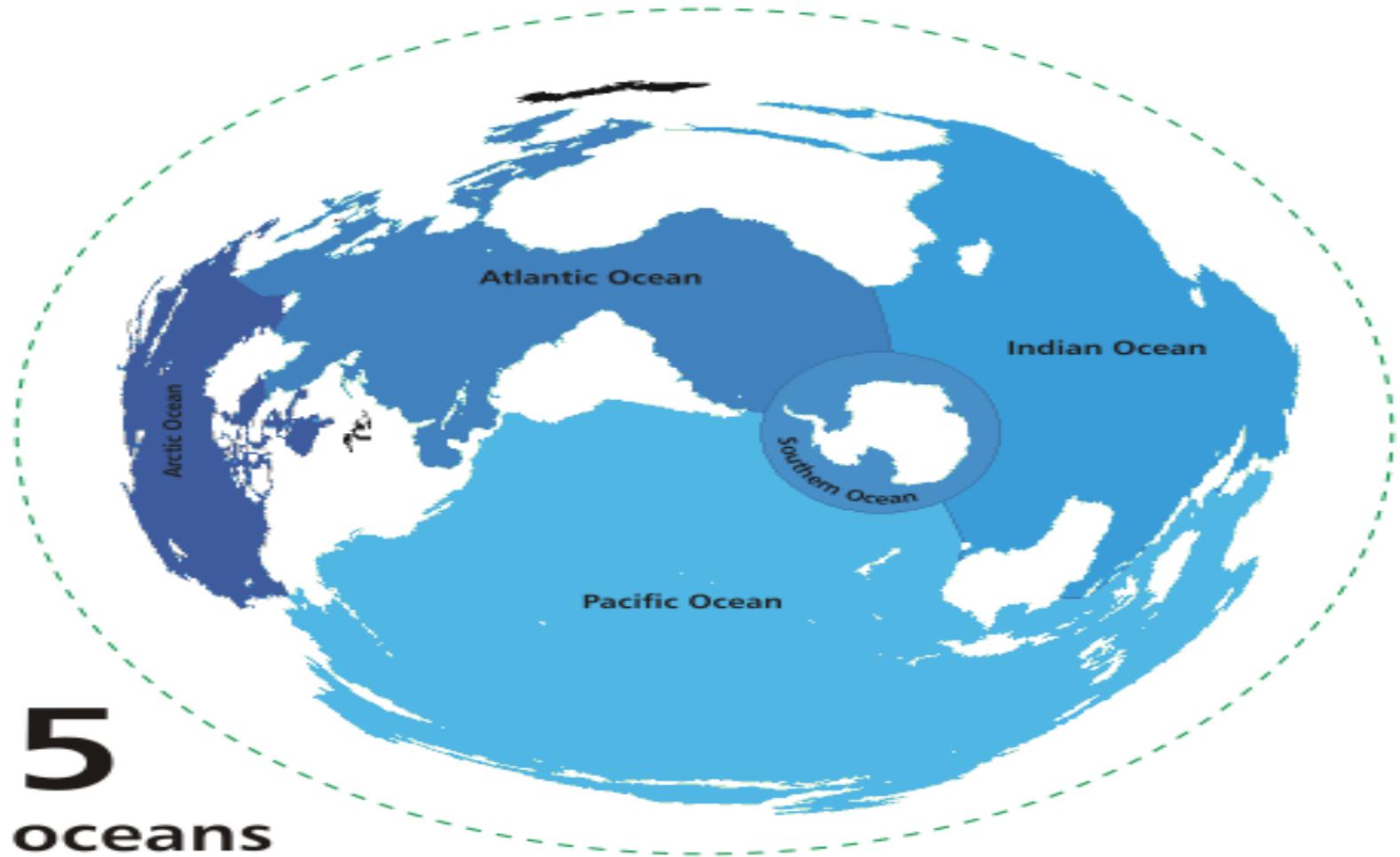


**Gas y petróleo en
Hammersfest**

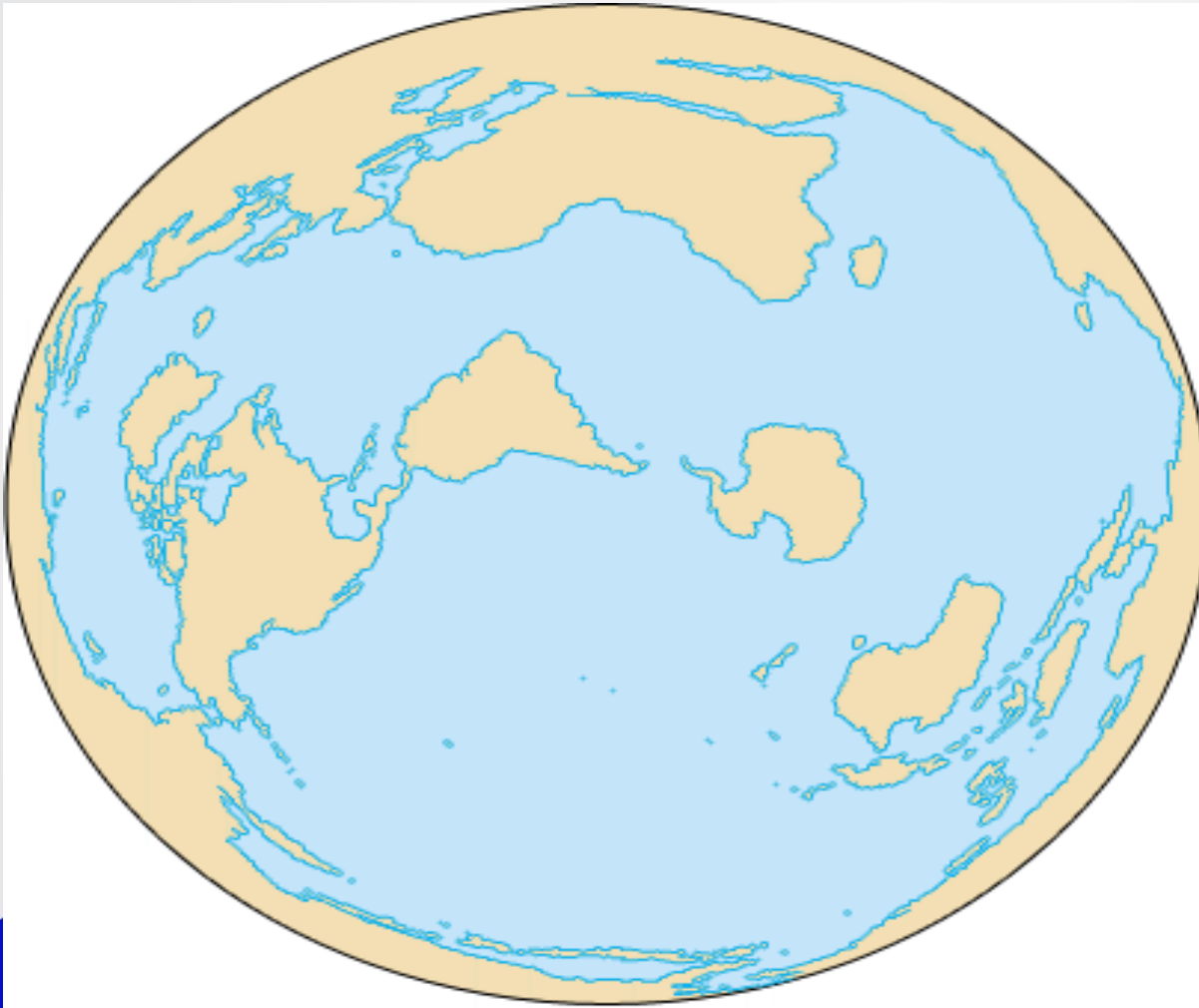
Nuevas Rutas Árticas

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World Ocean



World Ocean



Recordar que la realidad es que el Globo está compuesto por $\frac{3}{4}$ partes de agua. ¡Tal vez no debería llamarse Tierra!

Nuevas Rutas Árticas

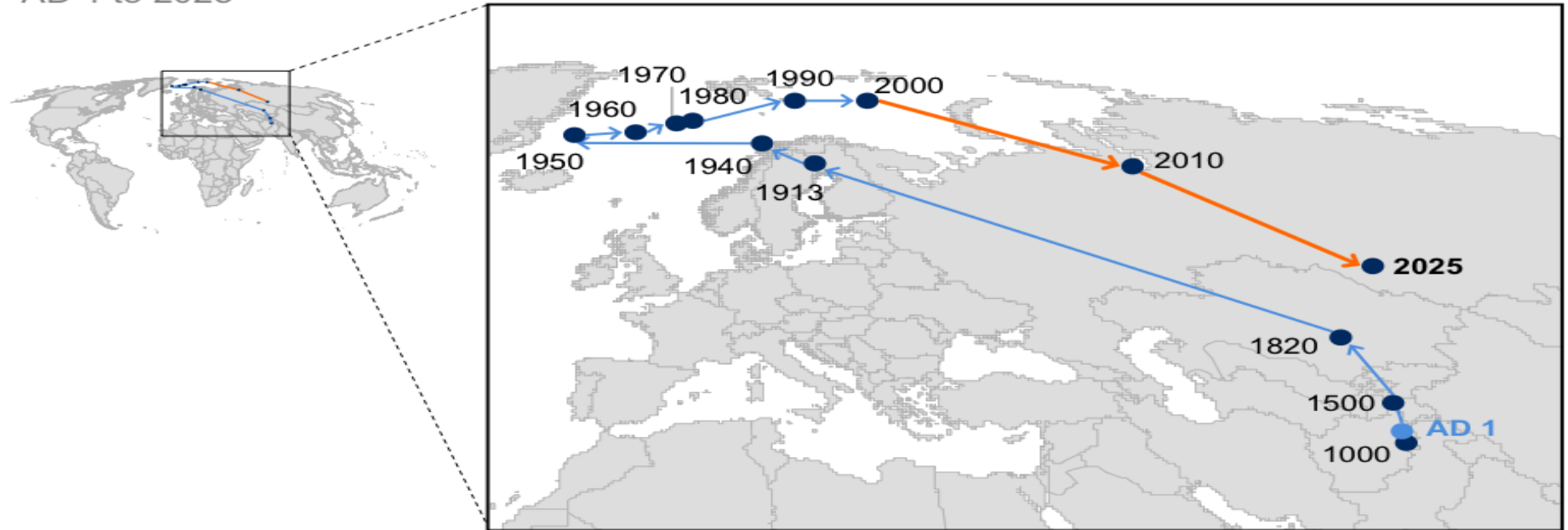
¿Hacia donde "nos mueven"?

Exhibit 3

By far the most rapid shift in the world's economic center of gravity happened in 2000–10, reversing previous decades of development

Evolution of the earth's economic center of gravity¹

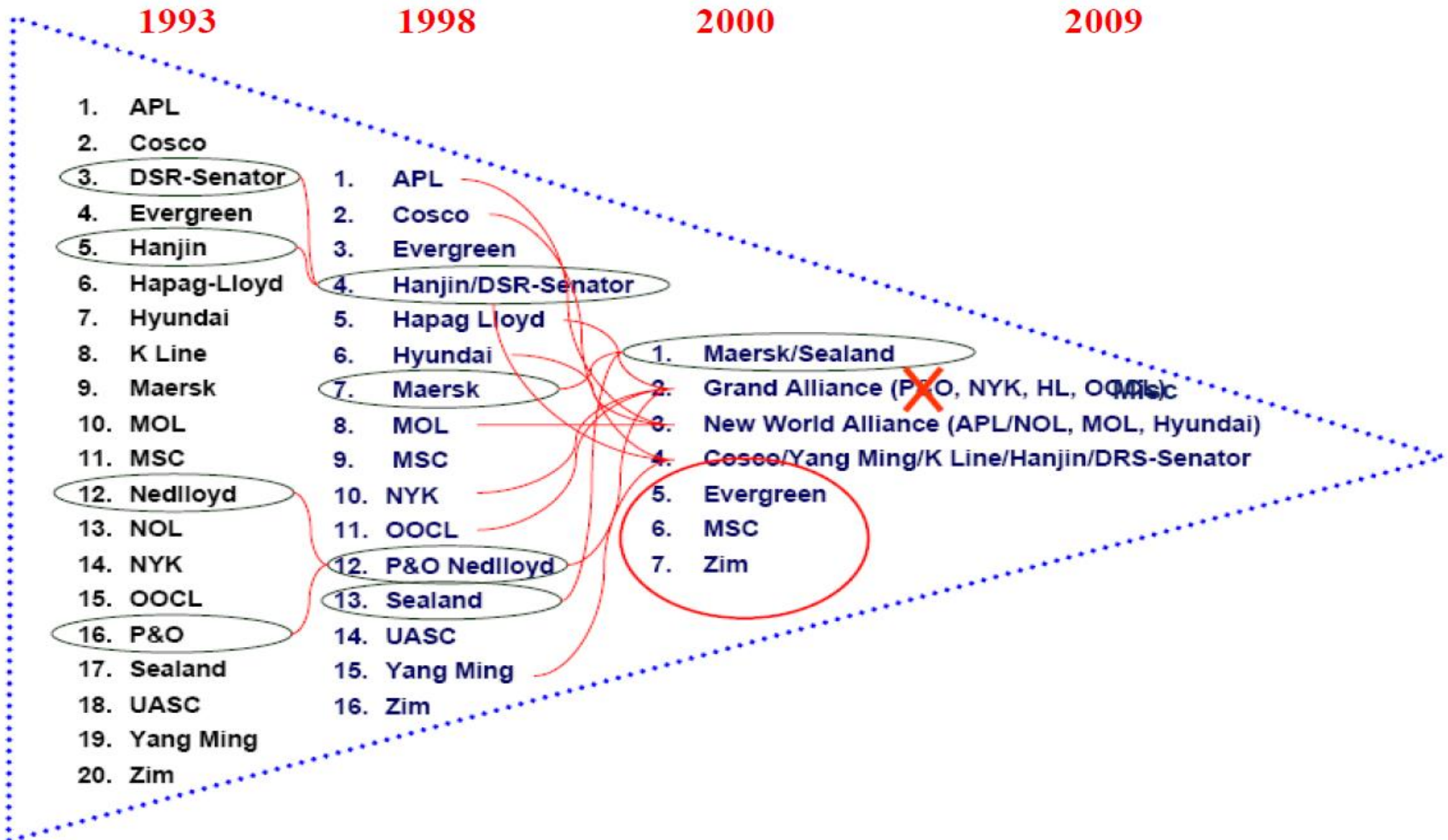
AD 1 to 2025



¹ Economic center of gravity is calculated by weighting locations by GDP in three dimensions and projected to the nearest point on the earth's surface. The surface projection of the center of gravity shifts north over the course of the century, reflecting the fact that in three-dimensional space America and Asia are not only "next" to each other, but also "across" from each other.

SOURCE: McKinsey Global Institute analysis using data from Angus Maddison; University of Groningen

Top 20 navieras - Global



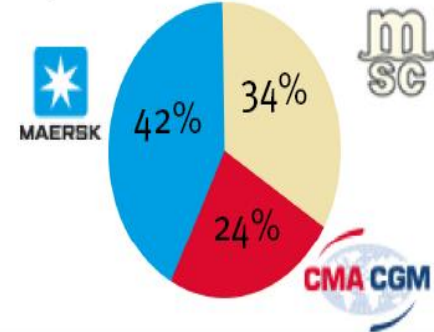
Fuente: Ricardo Sánchez, CEPAL

Alianza P3

The P3 Network Box trio's mega vessel sharing agreement for the east-west trades



Ship contributions:

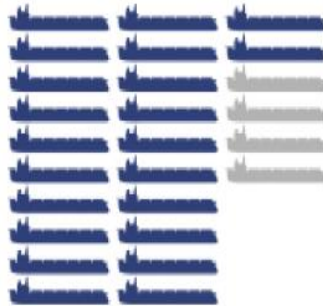


Coverage:



Asia-Europe, transpacific and transatlantic trades

Capacity:



Initially 255 vessels of 2.6m teu deployed on 29 routes

Sales, marketing & customer services:



Each line will continue to negotiate with customers and set freight rates

Fleet management:



A new arm's-length joint vessel-operation centre to be set up in London

BATTLE FOR EAST-WEST DOMINANCE

The G6 Alliance has unveiled plans to expand into the trans-Atlantic and Asia-U.S. West Coast trade lanes in response to the proposed P3 Network.



Híper-competencia?

Competencia monopolística?

NUMBER OF VESSELS

240
VESSELS



252
VESSELS

NUMBER OF LOOPS

29
LOOPS

- 12 Asia-North America West Coast *planned*
- 6 Asia-Europe/Mediterranean
- 6 Asia-North America East Coast
- 3 Trans-Atlantic *planned*
- 2 Pendulums covering Asia-North America West Coast, Asia-North America East Coast, Trans-Atlantic

28
LOOPS

- 8 Asia-North Europe
- 6 Asia-North America West Coast
- 5 Asia-Mediterranean
- 5 Trans-Atlantic
- 4 Asia-North America East Coast

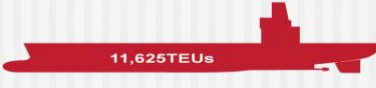
NUMBER OF PORTS

66
PORTS

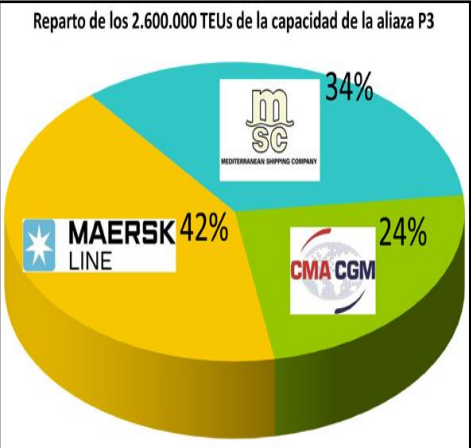
The G6 Alliance services are scheduled to begin in the second quarter of 2014, pending regulatory approval.

90
PORTS

ESTIMATED AVERAGE VESSEL SIZE IN ASIA-EUROPE TRADE



Sources: Carrier statements, Seatrade



Una nueva ruta de la seda?



Qué pasará?



¡GRACIAS!

