



La tormenta perfecta en la Cadena de Suministro Global

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Los Drivers del problema

Incremento de Demanda

Gente comprando cosas en lugar de hacer cosas

Desbalance

Unidades y vehículos en lugares de baja productividad

04

05

Puertos Cerrados

COVID 19 y su impacto sobre la gente de mar

03

Ever Given

Consecuencias del bloqueo del corredor de transporte más importante

02

01

Especulación/Incertidumbre

En río revuelto, ganancia de pescadores

LOGISPEDIA
CHANNEL



La ecuación
del desastre
ASUNTO
FLETES

**Incremento acelerado y sostenido por
demanda de bienes**

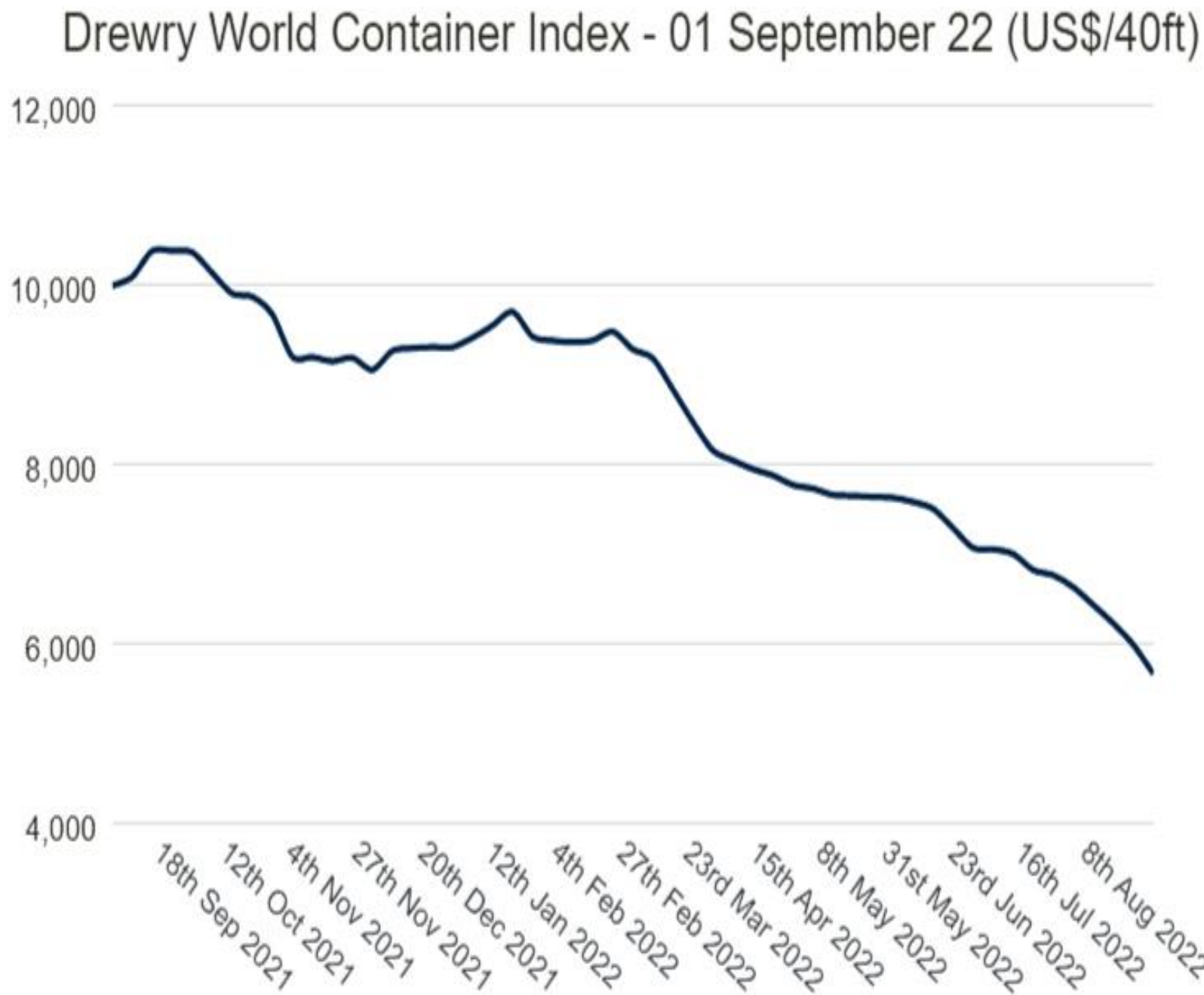


No incremento en capacidad



¡Precios altos en fletes!

La ecuación
del desastre
ASUNTO
FLETES



Efecto Forrester - Backhaul

Bloqueo de Canal de Suez



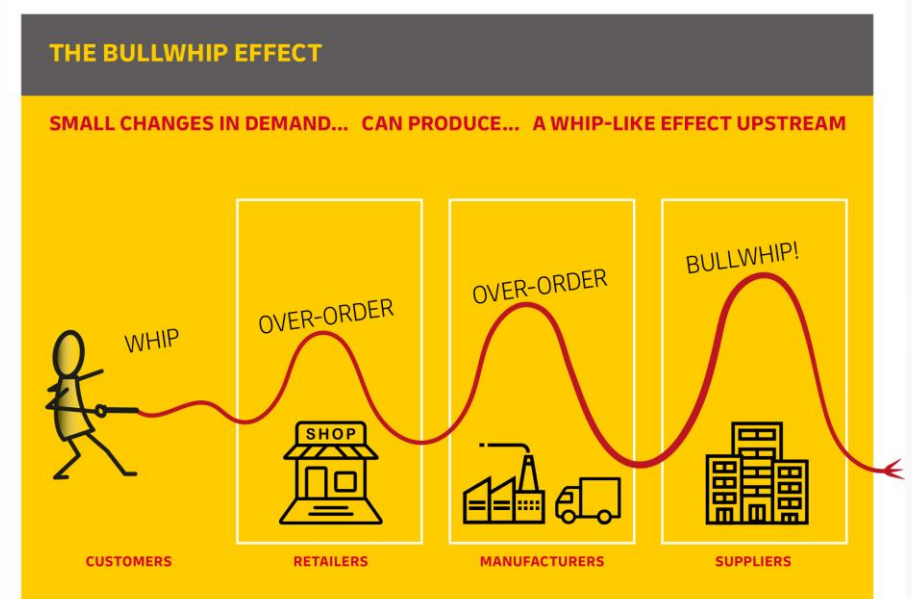
Los buques arriban retrasados a puerto



Se genera congestión en zonas de puerto

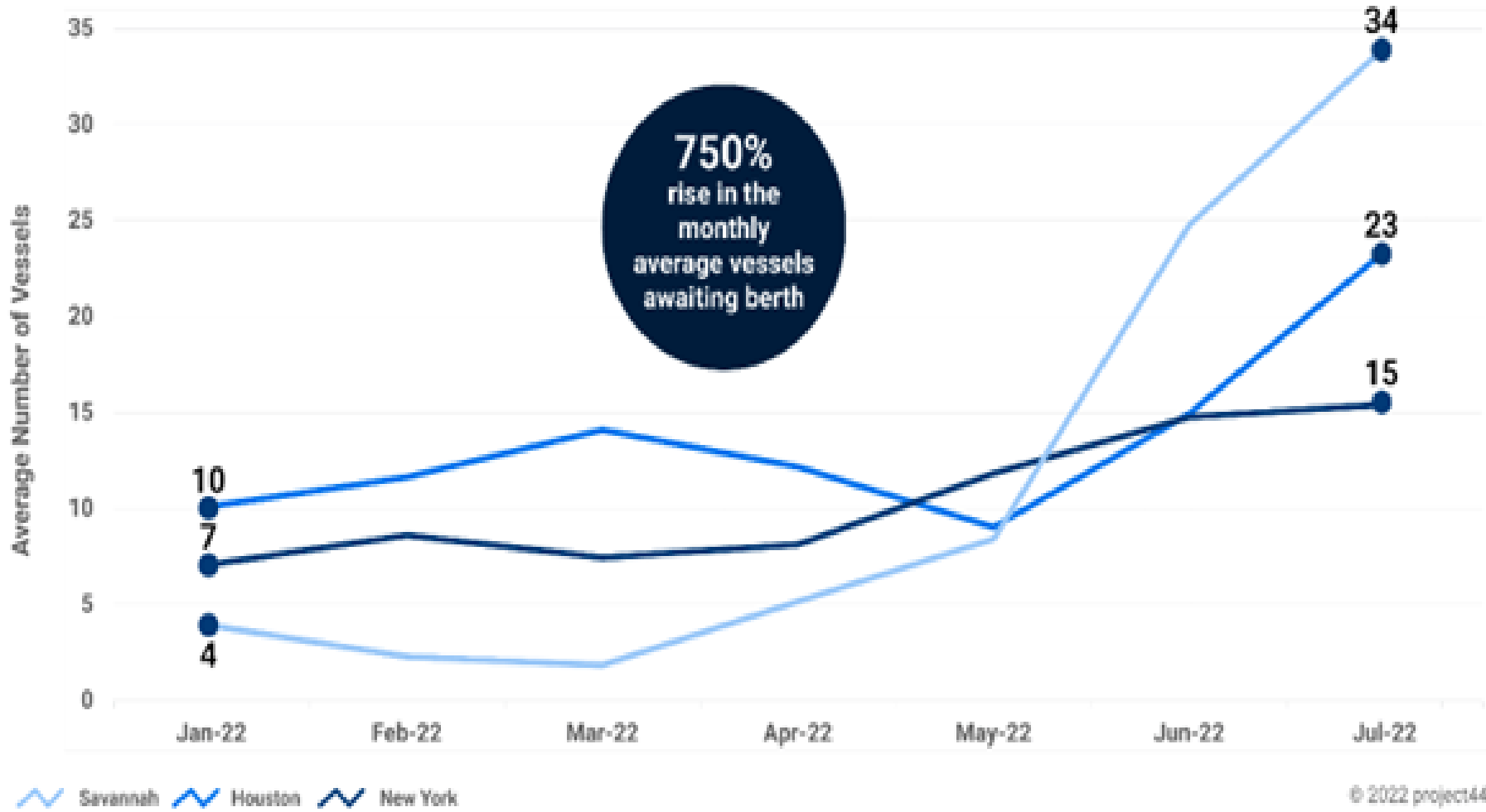


Desencadena en demoras en viajes de vuelta



Monthly Average of Vessels Awaiting Berth at the Top Ports in the East Coast of US

Average vessels awaiting berth at Houston & New York has been rising since March and since May at Savannah



**¡Fluctuar
entre 20 y 52
es caótico,
desastroso,
mortal!**

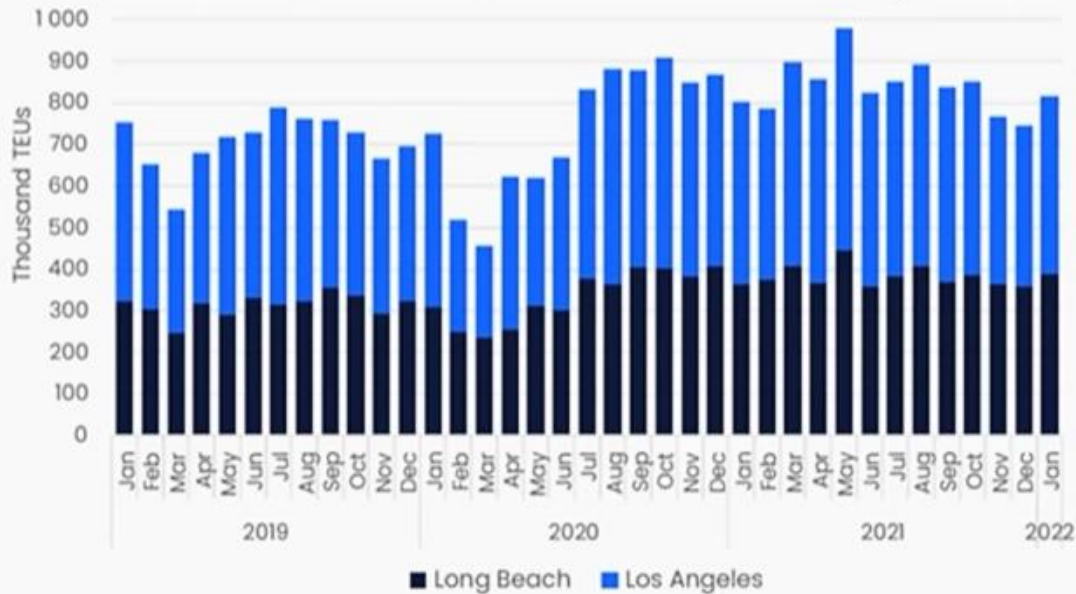


© 2022 project44

Moviendo montañas - Normalización

Congestion will continue to plague the market

Inbound container volumes San Pedro Bay



Source: Xeneta, Ports of Los Angeles and Long Beach

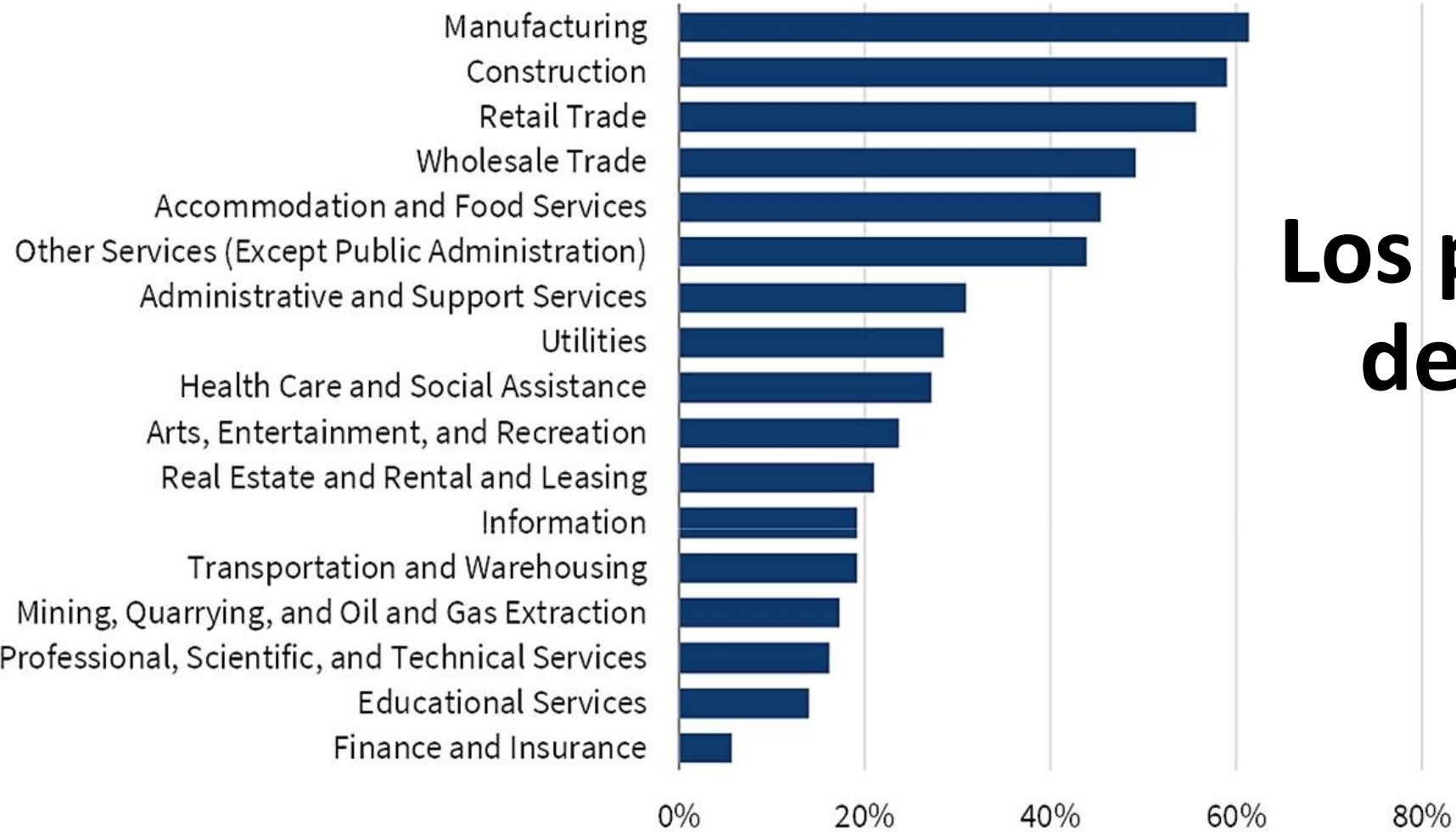
Terminal capacity used to clear backlog	Time to run down line
30%	2.5 months
20%	3.8 months
10%	7.5 months

"There is no doubt that it's not going to be easy negotiations, and a lot is at stake," says A.P. Moller-Maersk CEO Soren Skou, furthermore pointing out that the agreement covers all ports on the west coast.

"If it ends in strike, then it all shuts down," predicts the top exec of the Danish group, which operates the largest terminal in Los Angeles through its port company, APM Terminals.

Figure 2. Supply-Chain Disruptions By Sector

In the last week, did this business have domestic supplier delays? (percentage saying yes)



Los pesados efectos de la interrupción en USA

Sources: U.S. Census Bureau; CEA Calculations.



Critical help needed - congestion increasing

05 August 2021

North America

Share

As you are likely aware, the industry continues to face continued consumer demand and major challenges. This as an adverse effect on the availability of equipment. Due to delays in transit and storage challenges in North America, customers are retaining their equipment for longer than average periods. The longer each container is detained, the less equipment there is at origin to fill your import demand. The terminal fluidity is a challenge and the longer cargo sits at a terminal, depot, or rail head, the more difficult the situation will be to face.

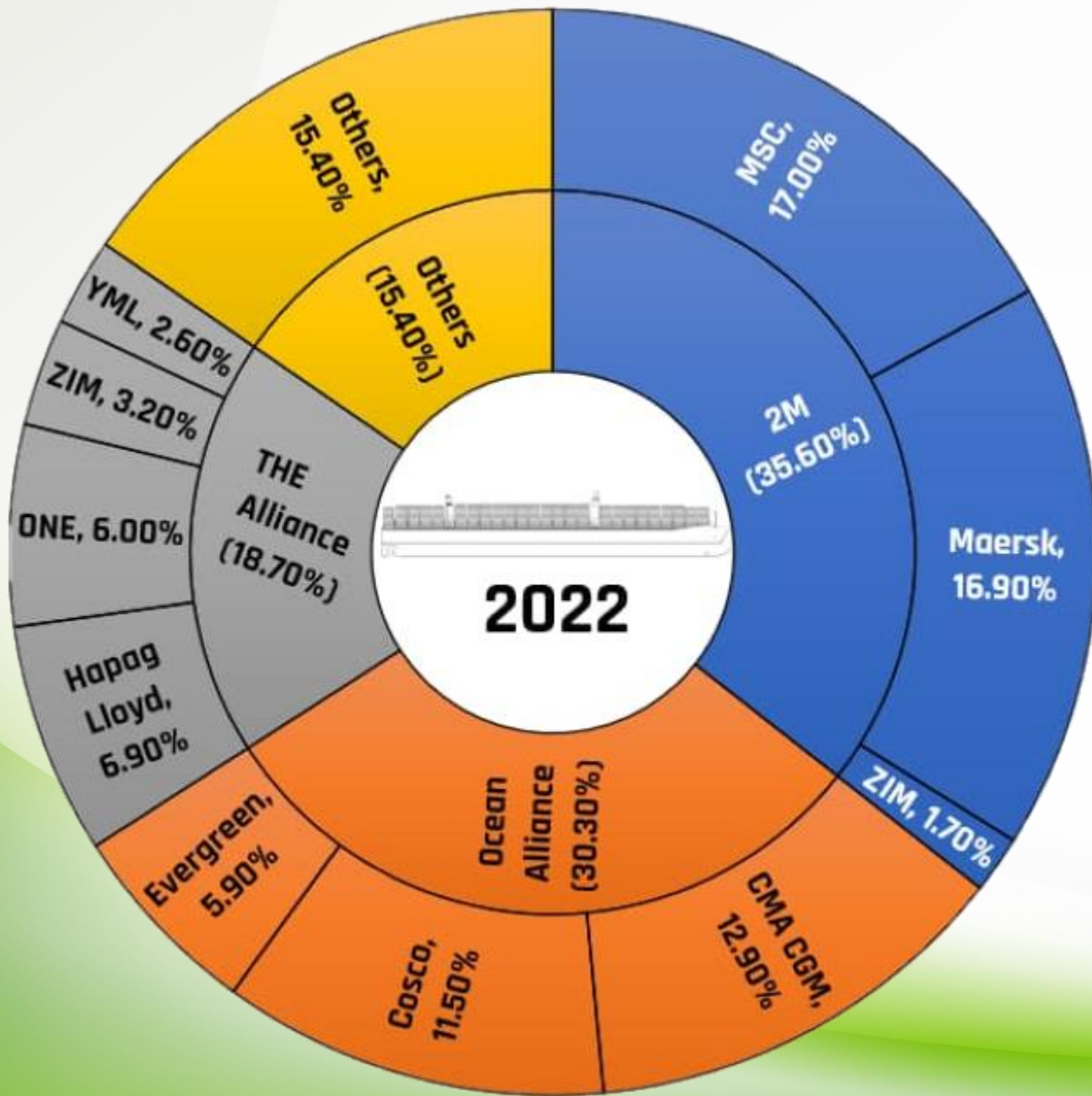
We need your help. Returning your chassis and containers as soon as you are able, will give us and other vendors the chance to move the equipment back to high demand origins far faster.

Help us help you

- o Please pick up your containers at the terminals as quickly as possible
- o Return your empty containers and chassis
- o Review any longstanding containers on the street and focus on equipment returns
- o Many terminals have increased hours and offer Saturday gates see the below list of terminal sites for more information on their hours
 - o Newark/Port Elizabeth – APM Terminals: click [here](#) for Port Elizabeth - Hours of Operation
 - o Newark - PNCT: click [here](#) for PNCT - Gate hours
 - o Newark - Maher: click [here](#) for Maher - Hours of Operation
 - o Los Angeles - Pier 400: click [here](#) for Los Angeles - Hours of Operation
 - o Houston - Bayport Terminal & Barbours Cut: click [here](#) for gate information
 - o Georgia Ports: click [here](#) for notices

El pedido urgente de los grandes jugadores

¿Se volvió esto un B2C?



¿A mayor concentración, mayor dificultad para controlar los precios?

Con base en Alphaliner



Para que vean que el tamaño **SÍ** importa

El crecimiento del rendimiento en los 30 puertos de contenedores más grandes del mundo superó el 6,5 % en 2021

Rank	Port Name	Country	2021	2020	2019	Growth 21/20%	Growth 20/19%
1 (1)	Shanghai	China	47,025,000	43,501,400	43,303,000	8.1%	0.5%
2 (2)	Singapore	Singapore	37,467,700	36,870,940	37,195,636	1.6%	-0.9%
3 (3)	Ningbo-Zhoushan	China	31,080,000	28,734,300	27,535,000	8.2%	4.4%
4 (4)	Shenzhen	China	28,760,000	26,553,000	25,771,700	8.3%	3.0%
5 (5)	Guangzhou-Nansha	China	24,180,000	23,191,500	23,236,200	4.3%	-0.2%
6 (6)	Qingdao	China	23,700,000	22,004,700	21,010,000	7.7%	4.7%
7 (7)	Busan	S Korea	22,690,258	21,823,995	21,992,000	4.0%	-0.8%
8 (8)	Tianjin	China	20,260,000	18,356,100	17,300,700	10.4%	6.1%
9 (10)	Los Angeles/Long Beach	US	20,061,978	17,326,718	16,969,666	15.8%	2.1%
10 (9)	Hong Kong	China	17,788,000	17,326,720	18,303,000	2.7%	-5.3%
11 (11)	Rotterdam*	Netherlands	15,300,000	14,349,446	14,810,804	6.6%	-0.03%
12 (12)	Dubai/Jebel Ali	UAE	13,700,000	13,484,600	14,111,000	1.6%	-4.4%
13 (13)	Port Kelang*	Malaysia	13,700,000	13,244,414	13,580,717	3.4%	-2.5%
14 (15)	Xiamen	China	12,030,000	11,410,000	11,122,180	5.4%	2.6%
15 (14)	Antwerp	Belgium	12,020,245	12,031,467	11,860,204	-0.1%	1.4%



TOP 100

Alphaliner TOP 100 / 01 Sep 2022



TOP 100

Alp

Global figures

**6,439** active ships
including 5,626 fully cellular**25,936,982** TEU
25,543,879 TEU fully cellular**310,712,122** DWT

TOP 100

Alp

Global figures



Global figures

figures are consolidatedRegional Trades
weekly capacitiesTrans-Atlantic **166,036** TEU
Trans-Pacific **618,676** TEU
Feast-Europe **448,285** TEUFigures are consolidated

Rank	Operator	Rank	Operator	Teu	Share	Existing fleet	Orderbook
		1	Mediterranean Shg Co	4,475,902	17.4%		
		2	Maersk	4,250,047	16.5%		
		3	CMA CGM Group	3,324,699	12.9%		
		4	COSCO Group	2,875,703	11.2%		
		5	Hapag-Lloyd	1,762,712	6.8%		
		6	Evergreen Line	1,581,205	6.1%		
		7	ONE (Ocean Network Express)	1,497,162	5.8%		
		8	HMM Co Ltd	818,075	3.2%		
		9	Yang Ming Marine Transport Corp.	696,543	2.7%		
		10	Zim	515,902	2.0%		
		11	Wan Hai Lines	439,541	1.7%		
		12	PIL (Pacific Int. Line)	297,163	1.2%		
		13	SITC	150,635	0.6%		
		14	KMTC	149,255	0.6%		
		15	IRISL Group	143,468	0.6%		
				156,995	0.6%		
				150,040	0.6%		
				144,331	0.6%		
				156,995	0.6%		
				150,040	0.6%		
				145,784	0.6%		

Figures are consolidated

Rank

Operator

Rank

Operator

1 Mediterranean

2 Maersk

3 CMA CGM Group

4 COSCO Group

5 Hapag-Lloyd

6 Evergreen Line

7 ONE (Ocean Network Express)

8 HMM Co Ltd

9 Yang Ming Marine Transport Corp.

10 Zim

11 Wan Hai Lines

12 PIL (Pacific Int. Line)

13 SITC

14 KMTC

15 IRISL Group

16 X-Press Feeders Group

ANNEE



Los dueños del negocio

Over 6.6 mteu dry freight and 386,000 reefer teu were produced in China last year – both record performances.

40ft high cube containers were dominant, accounting for over 85% of dry freight production and 96% of reefer output.

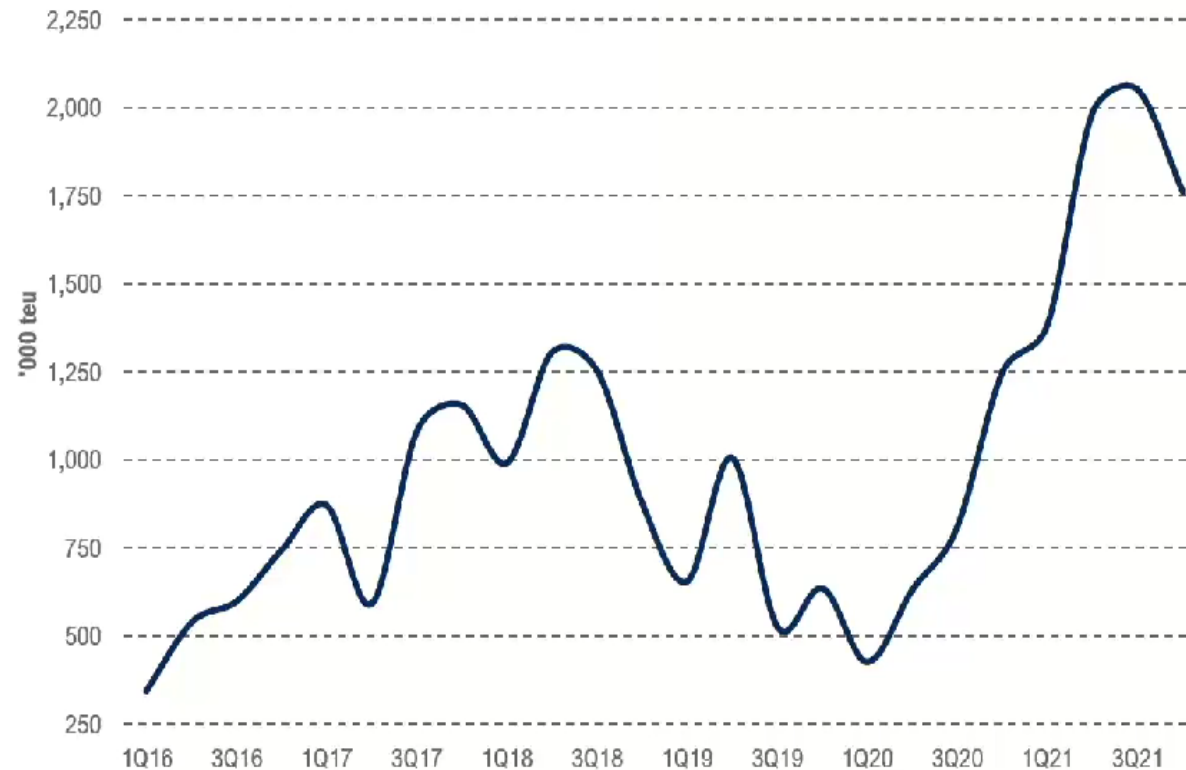
The market was mainly driven by ocean carriers needing more equipment in their pools because of the slower turnaround of containers

Production slowed in 4Q21 as factories worked fewer hours and orders tailed off

Drewry expects at least 4.5 mteu to be produced in 2022

Global container production

A record 7.2 mteu was manufactured in 2021 with China producing 97%

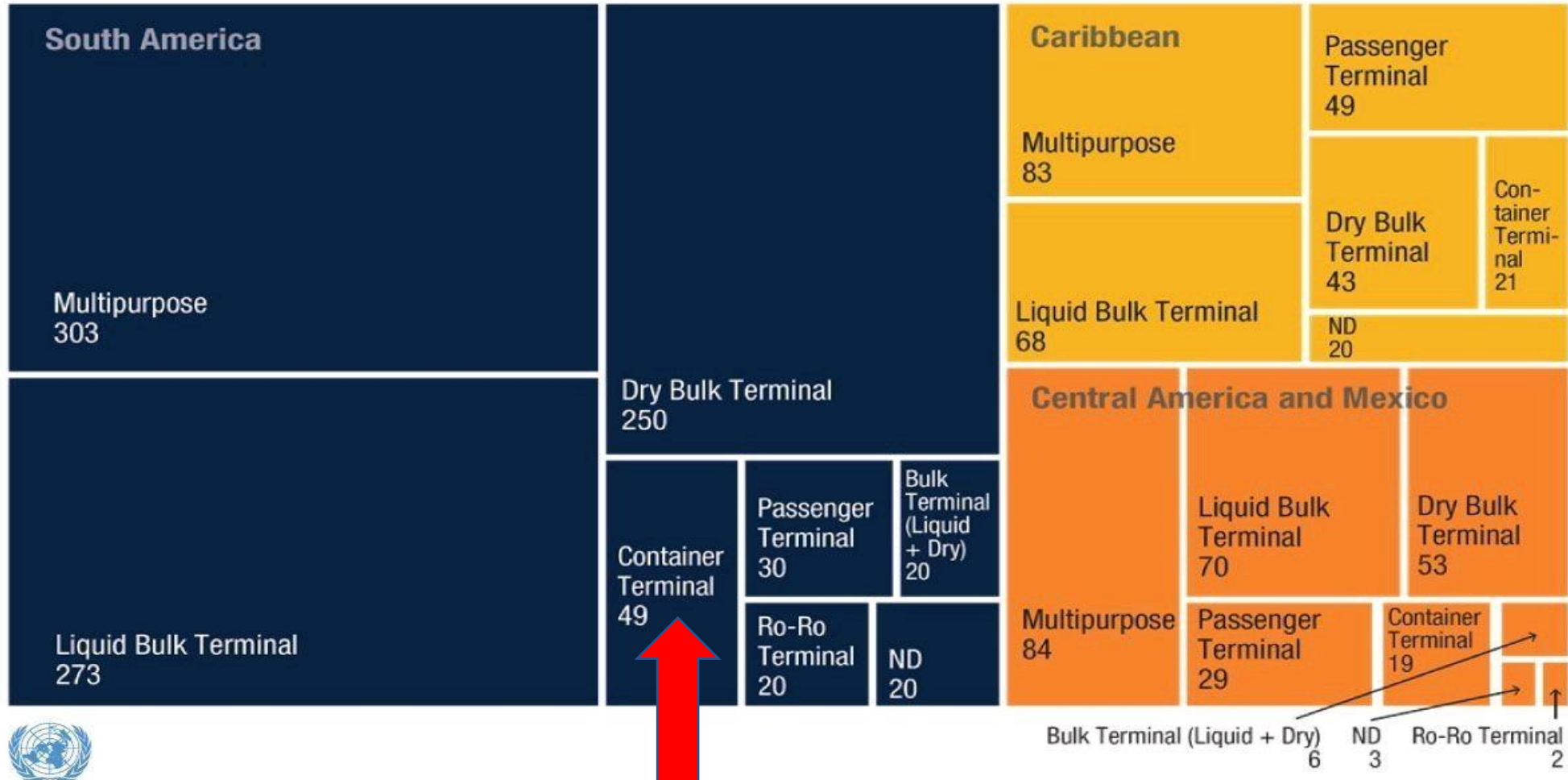


Source: Drewry 4Q21 Container Equipment Forecaster

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¿Cómo nos afecta esta crisis en LATAM?

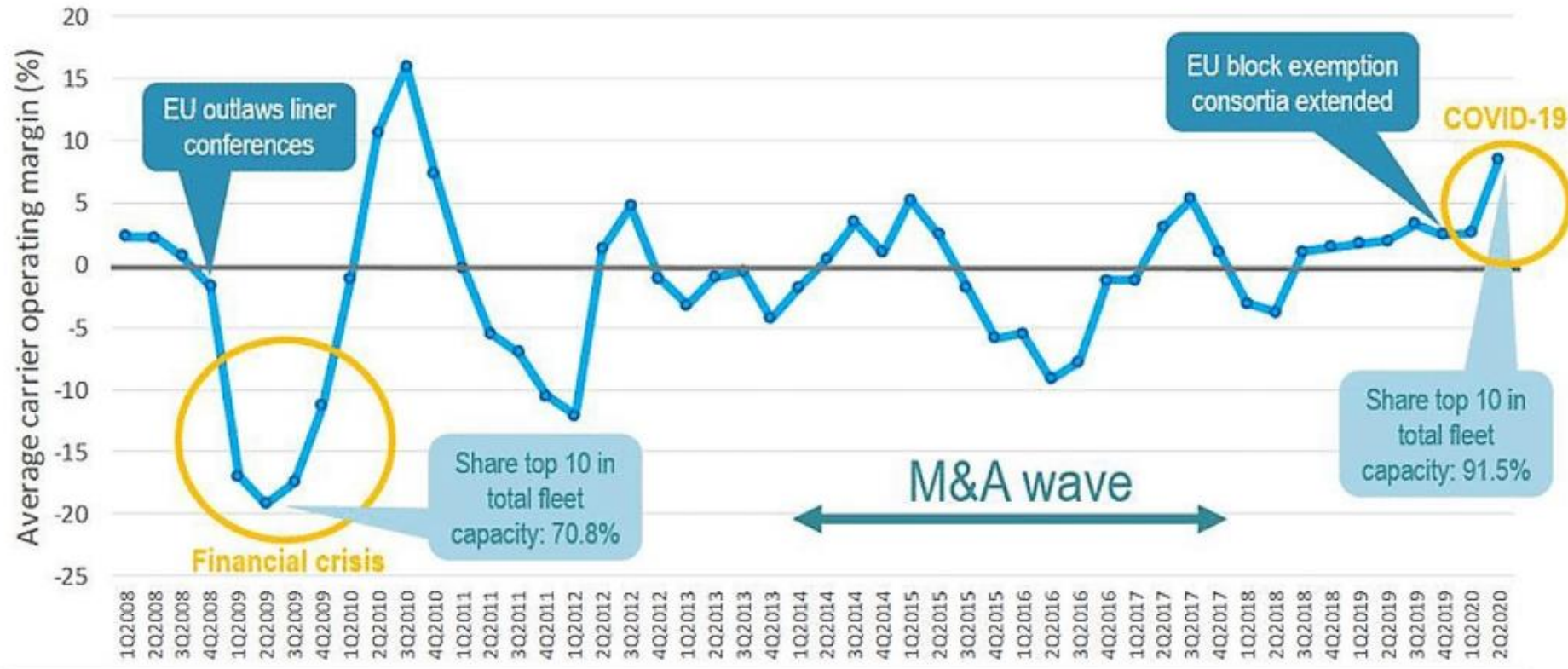
Latin America and the Caribbean port facilities by zones and specialties



Source: Review of Maritime Transport 2021



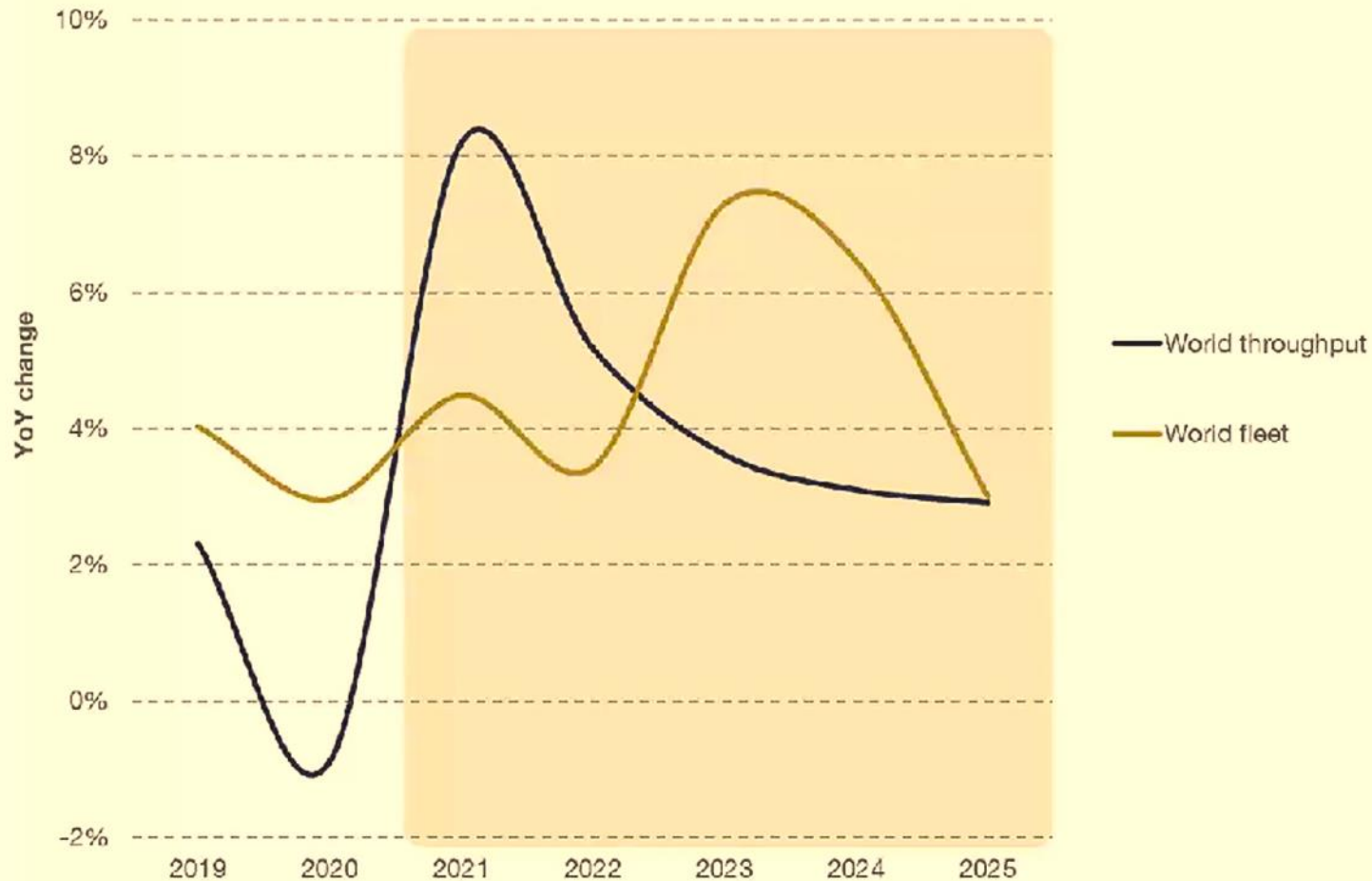
¿Hay razones para mejorar la situación?



Average operating margin of main container carriers by quarter, 1Q 2008 to 2Q 2020 Notes: Average of CMA CGM (incl APL to 2Q 2016), CSCL (to 1Q2016), COSCO (from 3Q 2018), Evergreen, Hanjin (to 3Q 2016), Hapag-Lloyd (incl CSAV to 2014), HMM, Maersk, ONE (from 2Q 2018, formerly K-Line, MOL and NYK), Wan Hai, Yang Ming and Zim. MSC, the world's second-largest container shipping company, does not report on financial results given its family-owned nature.



Global Container Shipping Supply/Demand Outlook



Source: Drewry 3Q 21 Container Forecaster

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**La gran pregunta
¿Cuándo cesa
la tormenta?**



¿Por qué hasta 2025? - Recovery

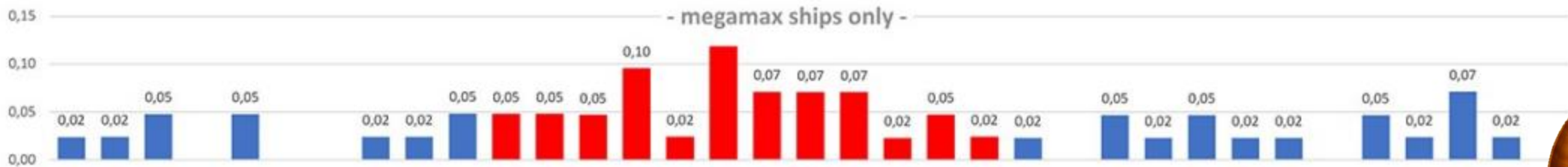
The orderbook: projected container ship deliveries by month (in Mteu)

as per 25 February 2022 :: confirmed orders only : excludes 'reported' orders and orders at 'letter of intent' stage

- total orderbook, all cellular ships -



- megamax ships only -



¿Cómo configurar una Cadena de Suministro más resiliente?

Predicción

Desarrollar capacidad

Entender complejidad de la demanda para cada uno de los productos, así como las variables que la determinan

Protección

Evitar sorpresas

Uso de digitalización para anticiparse a los quiebres y establecer niveles de servicio acordes con los ajustes en Cadena

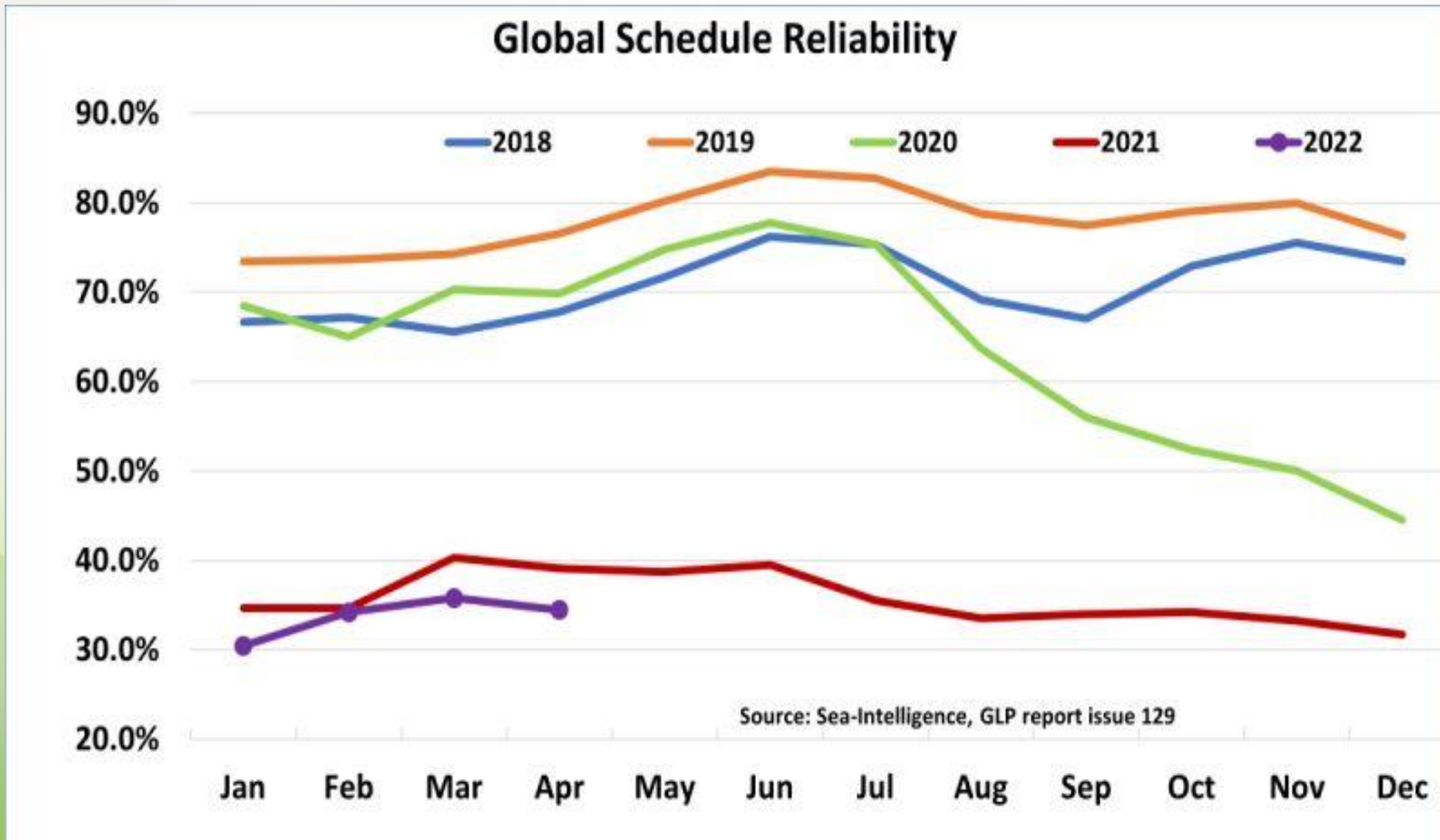
Respuesta

Eficiencia

Gestionar los flujos logísticos y los recursos (inventario, transporte y canales) a lo largo de la cadena, para maximizar beneficio



La confiabilidad sigue por el suelo



Russia's war on Ukraine could triple ocean shipping rates to \$30,000 per container, expert says

Grace Kay Mar 1, 2022, 11:29 AM



Could sea freight rates fall despite Russia's invasion of Ukraine?



Gregor Gowans
Journalist Trans.INFO

07.03.2022

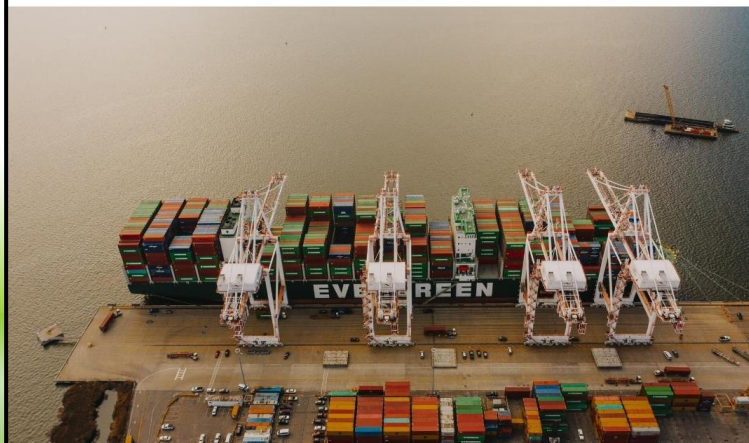
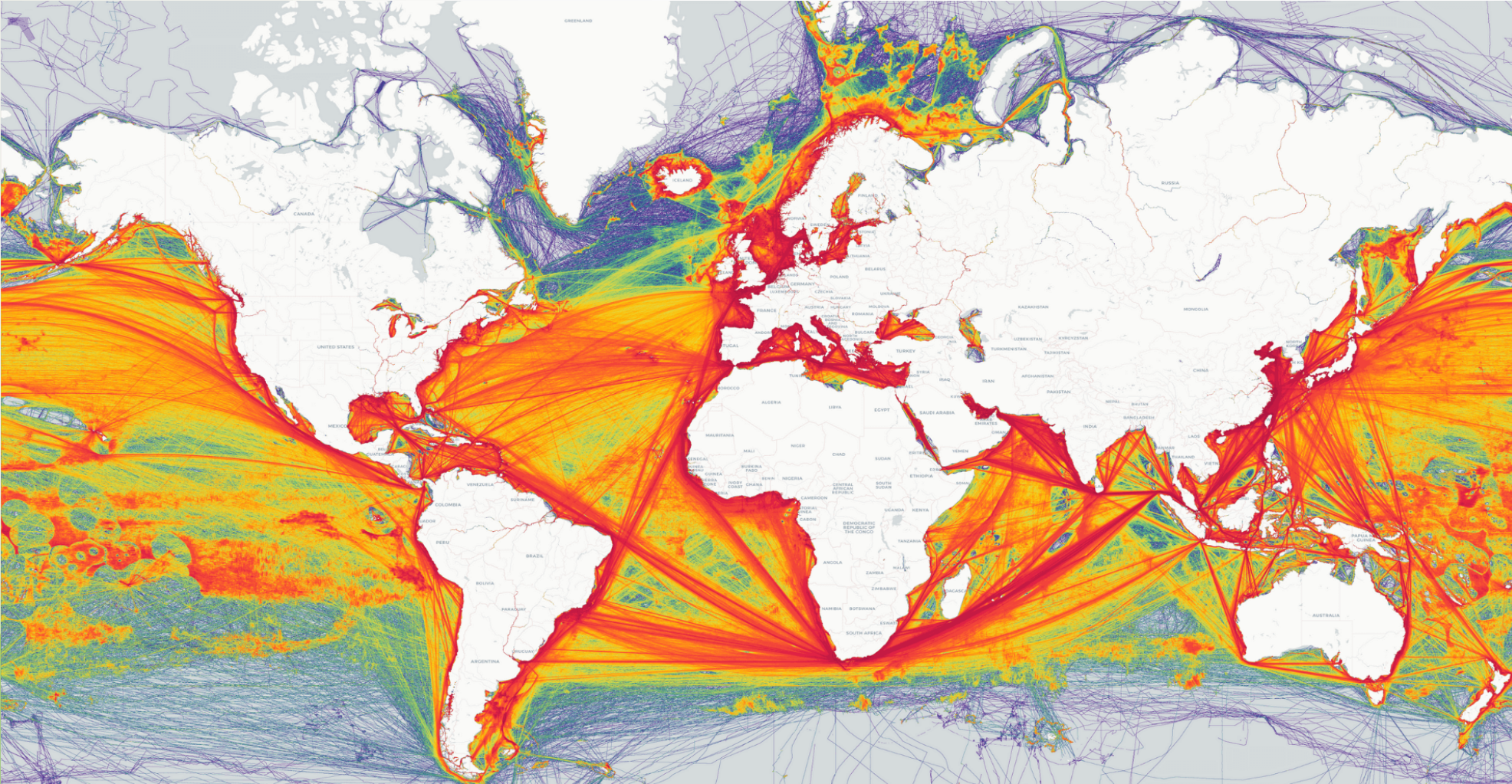


Photo by Kelly L from Pexels

¿La guerra agudizará la crisis?





***Without shipping, half the world would starve
and the other half would freeze!***

Efthimios Mitropoulos – Ex IMO G.S.





¡Gracias!

 Ricardo A. Moreno R. 
 Logispedia Channel 

