



ABAC

ASSOCIAÇÃO BRASILEIRA DOS
ARMADORES DE CABOTAGEM

An Overview on Cabotage in Brazil

FONASBA
Vitoria - ES



Syndarma

October/2015

Brazilian Cabotage

- Brazilian Cabotage Vocation
- Regulatory Aspects
- Business performance
- Investments
- Market strengths
- Intermodal challenge

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Brazilian Cabotage Vocation

- More than 5000 miles of sea shore plus river linkage to Amazon Region;
- 60% of population along the coast
- Industrial production concentration in the Southeast-South region;
- Recent development and economical inclusion of North-Northeast Regions

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Regulatory Aspects

- Exclusivity for Brazilian Shipping Companies;
- Priority for Brazilian flag vessels;
- Flexibility to charter foreign flag vessels – procedures rules by Regulatory Agency

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Evolução do Transporte de Contêineres na Cabotagem

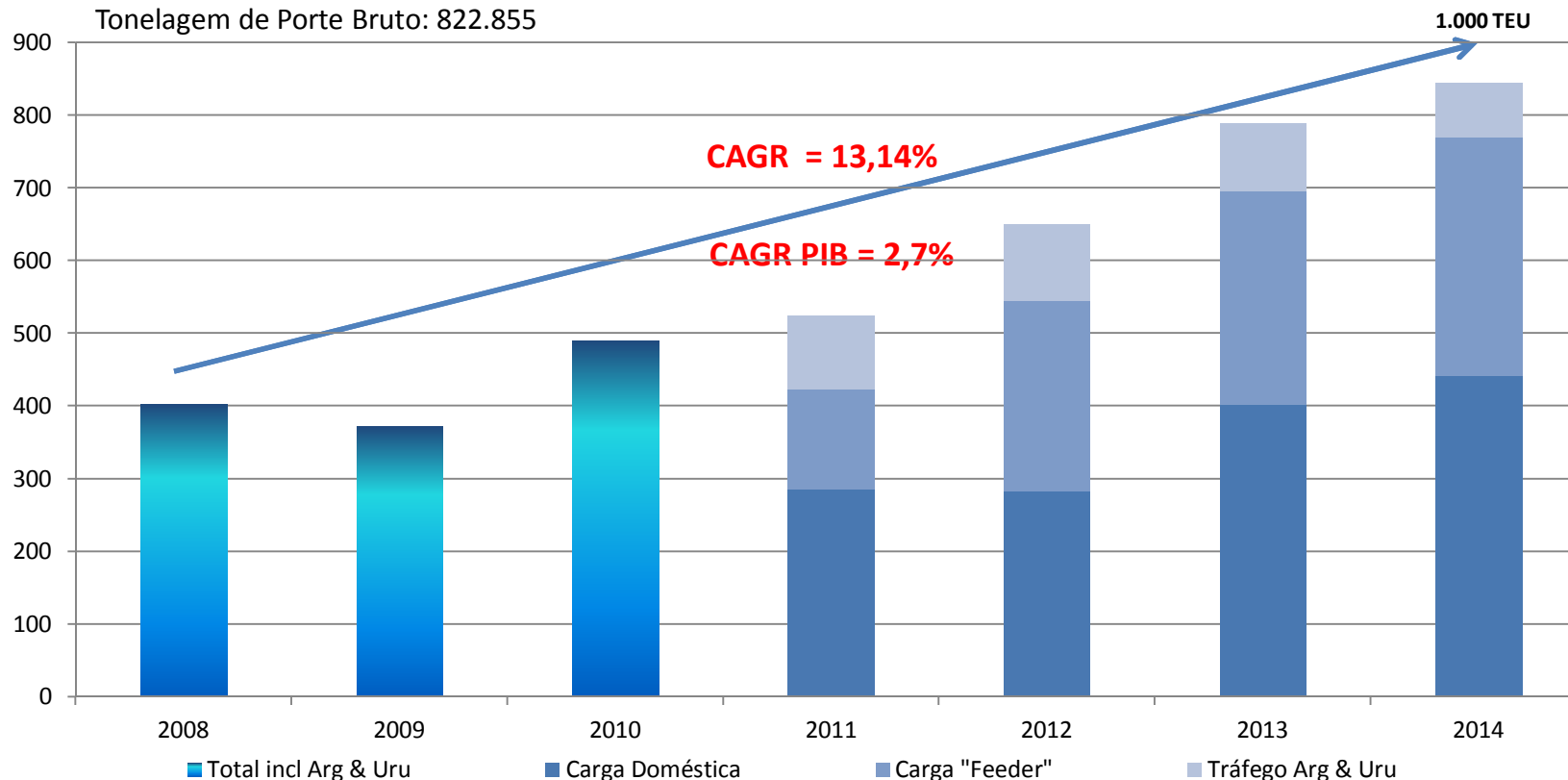
O transporte de carga em contêineres cresce de forma sustentada, em taxas bem superiores à economia do país.

Nº de Embarcações em tráfego regular : 21

Capacidade máxima em TEUS: 61.082

Tonelagem de Porte Bruto: 822.855

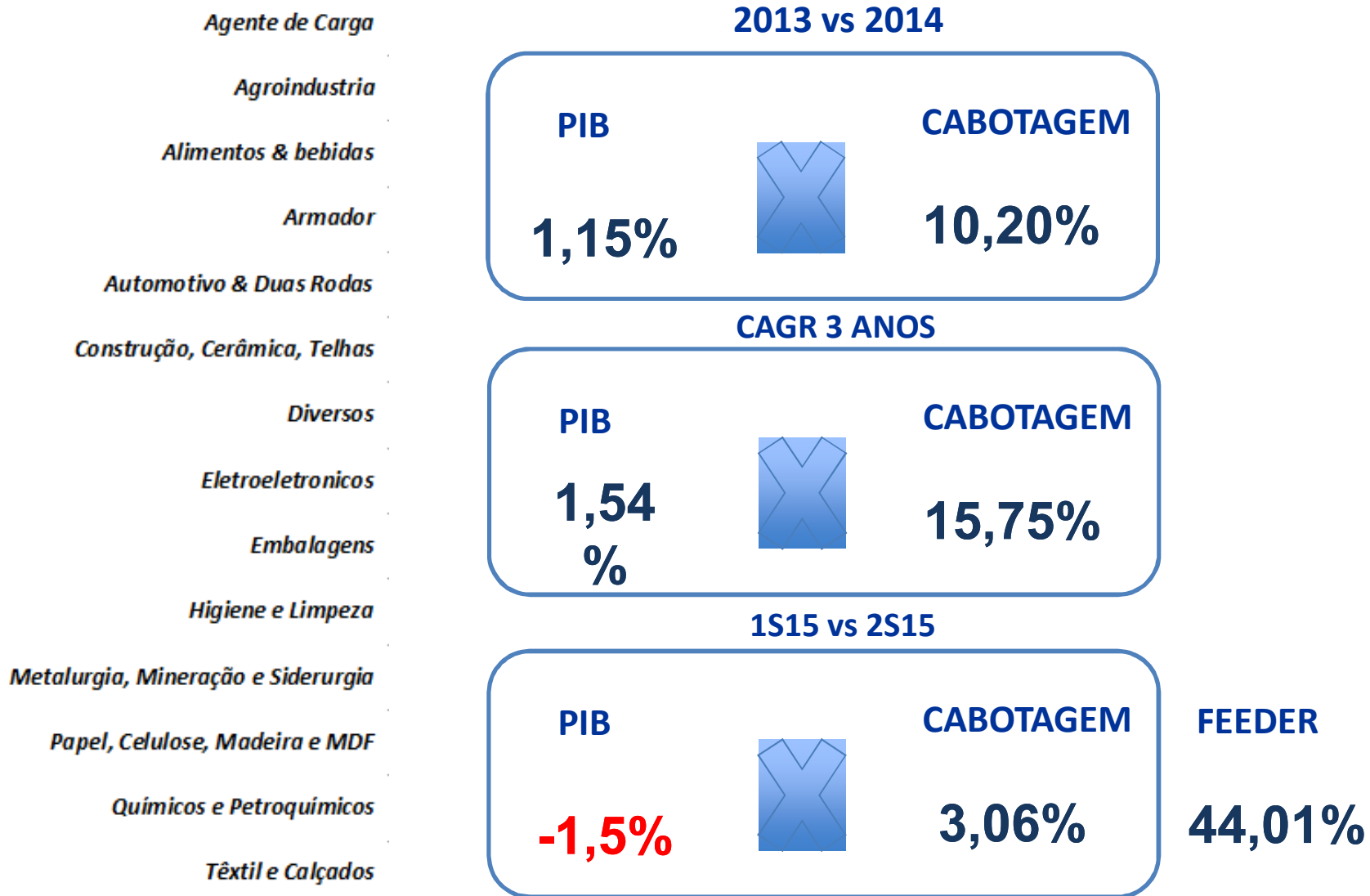
Carga Doméstica 2014/2013=10,2%



Obs: Serviços em Linha Regular, incluindo cargas "feeder" e tráfego Brasil / Argentina & Uruguai

Fonte: Empresas Associadas à ABAC

Presente em quase todos segmentos da produção nacional



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Frota Atual das Empresas Brasileiras de Navegação

Segmento	Container	Granel Sólido	Granel Líquido	Gaseiros	Multi-propósito	Barcaças Oceânicas	Total
Nº de Embarcações	16	10	6	3	3	12	50
Tonelagem (TPB)	656.378	556.567	131.462	25.635	70.281	101.134	1.541.456
Idade Média	5,8	14,3	10,2	14,7	7,3	11,7	9,82

A frota tem sido ampliada para atender à demanda nos vários segmentos.

Tipo de Embarcação		2009	2010	2011	2012	2013	2014	Total
Porta Container	Nº	2		1	1	4	2	10
	TPB	70.442		38.715	38.675	208.195	115.699	471.726
Granel Sólido	Nº			1	2	2		5
	TPB			75.012	113.215	158.484		346.711
Granel Líquido	Nº		1					1
	TPB		51.188					51.188
Barcaça Oceânica	Nº		1	1		2		4
	TPB		7.968	6.090		12.064		26.122

Total	
20	40%
895.747	58%

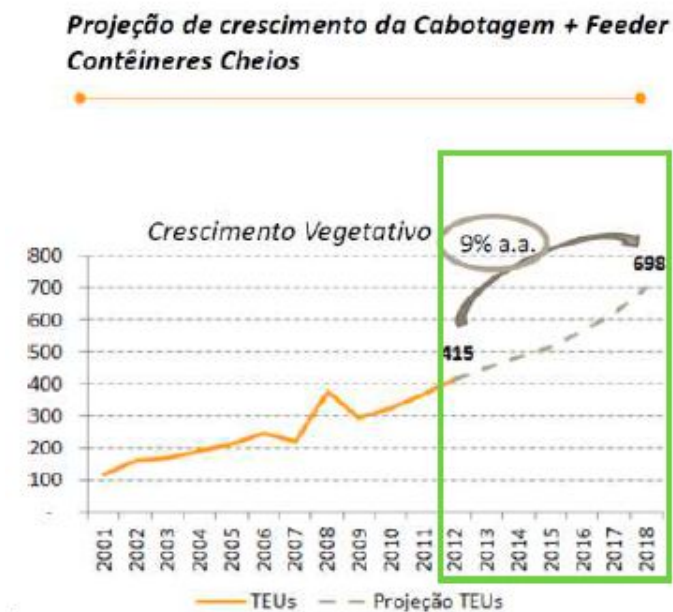
Fonte: Associados ABAC (dados excluindo Petrobras)

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... E as perspectivas são ainda melhores!

Estudo realizado pelo Instituto *ILOS* sinalizam que ainda há um grande potencial de crescimento.

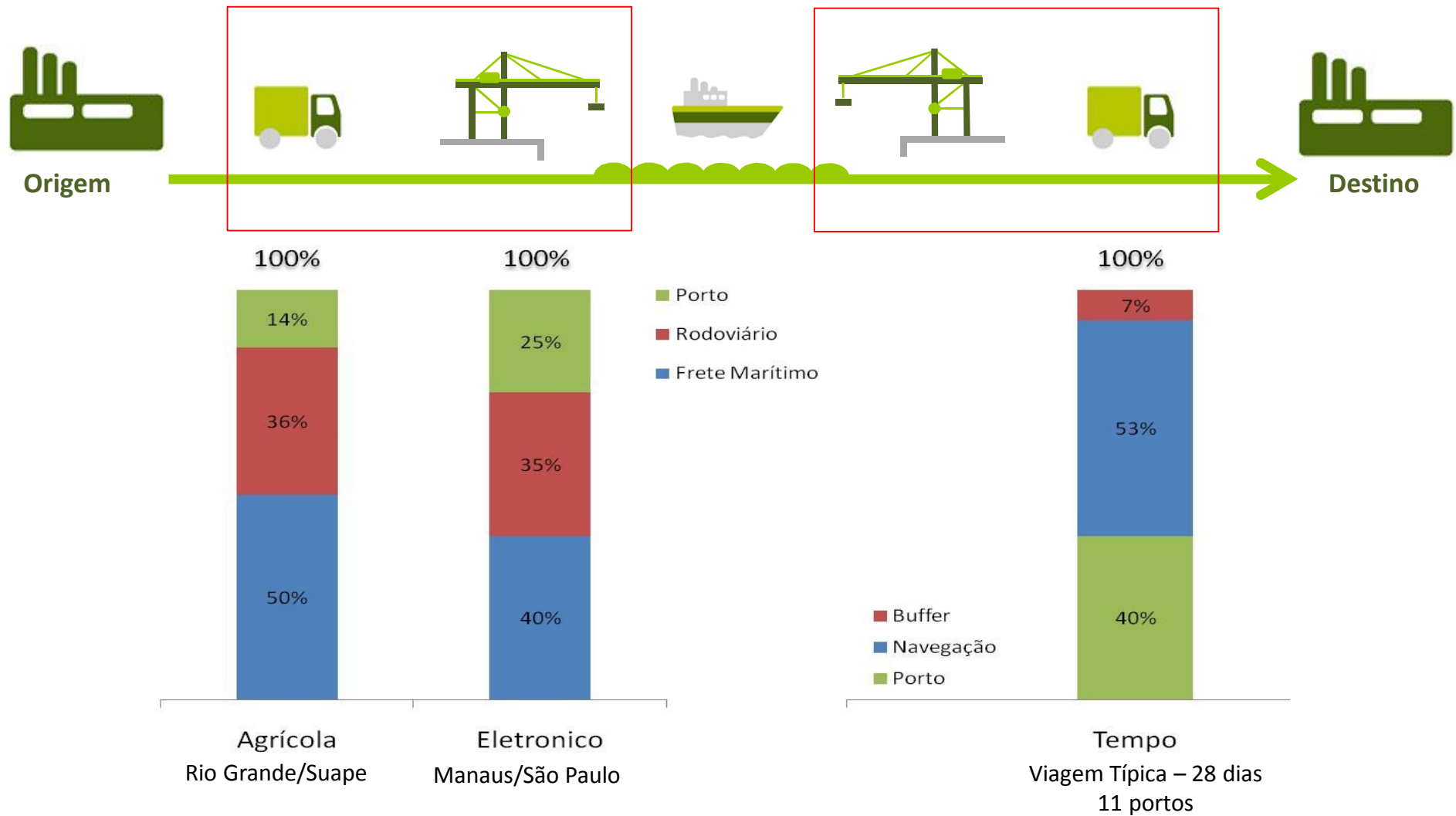


For each TEU already onboard, there are 6,5 TEU's on the truck transportation ready to be shifted to Cabotage

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Brazil struggles with infrastructure restrictions





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Obrigado!!!



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