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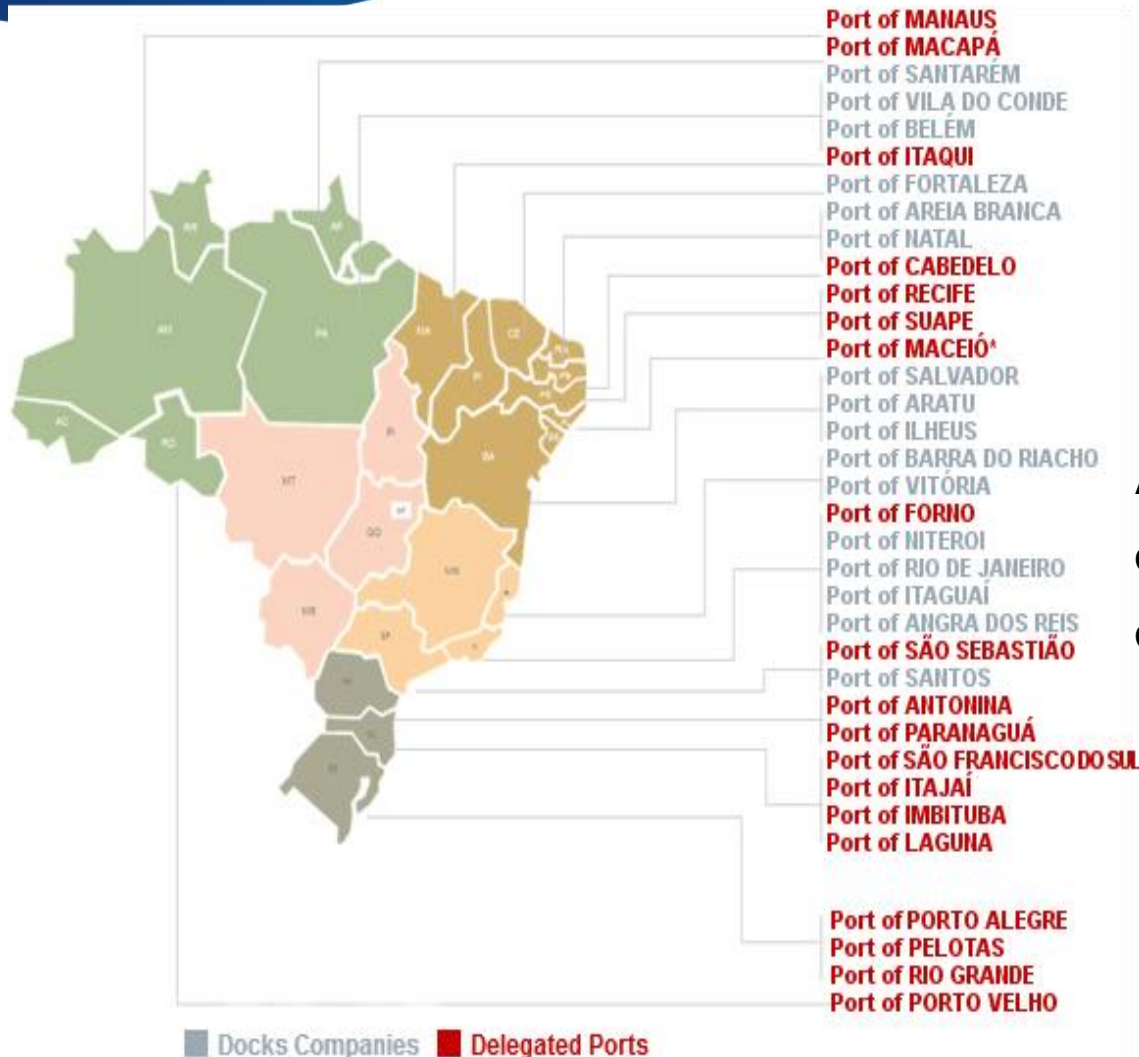


The potential for the growth of maritime transport in Brazil: focus on cabotage(short sea shipping)

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Introduction

➤ The Brazilian coast is 8,500 kilometers navigable, has 37 organized seaports, 156 Private Use Terminals (TUPs), 25 Transshipment Stations of Charges (ETCs), besides some river ports which serve coastal vessels (in Porto Alegre, Manaus, and Belém).



Organized Ports

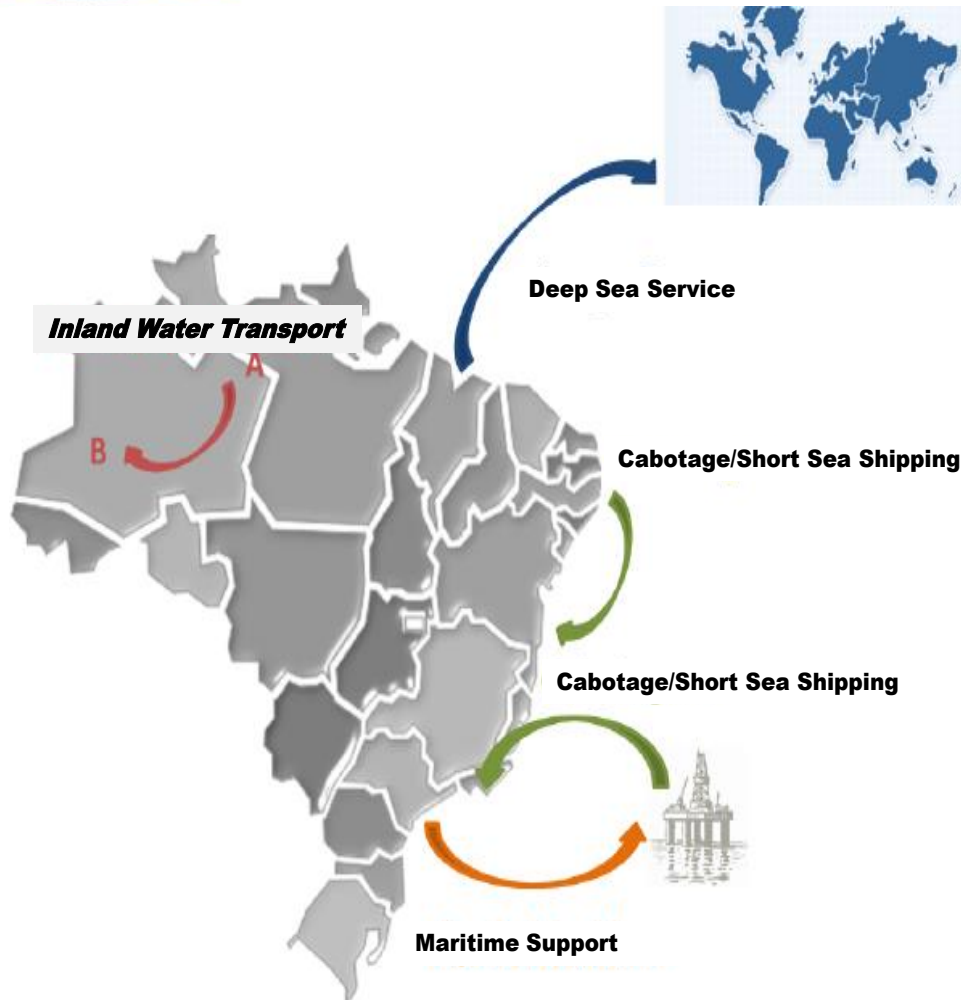
Most of them with Public Port Authority and terminals concessioned to private companies

Private
Use Terminals
(TUPs) (is expected the
increase of them in 10 years)



National Water Transportation Agency (ANTAQ)

➤ ANTAQ, the main regulatory agency, was created under Law 10.233 / 2001, which provides for the restructuring of waterway, and to compose the National Council for the Integration of Transport Policies.



The waterway
transport system
in Brazil

Current Scenario for SSS

➤ The private sector operates in cabotage/**S**hort **S**ea

Shipping with 40 companies;

➤ The estimated fleet is 153 vessels;

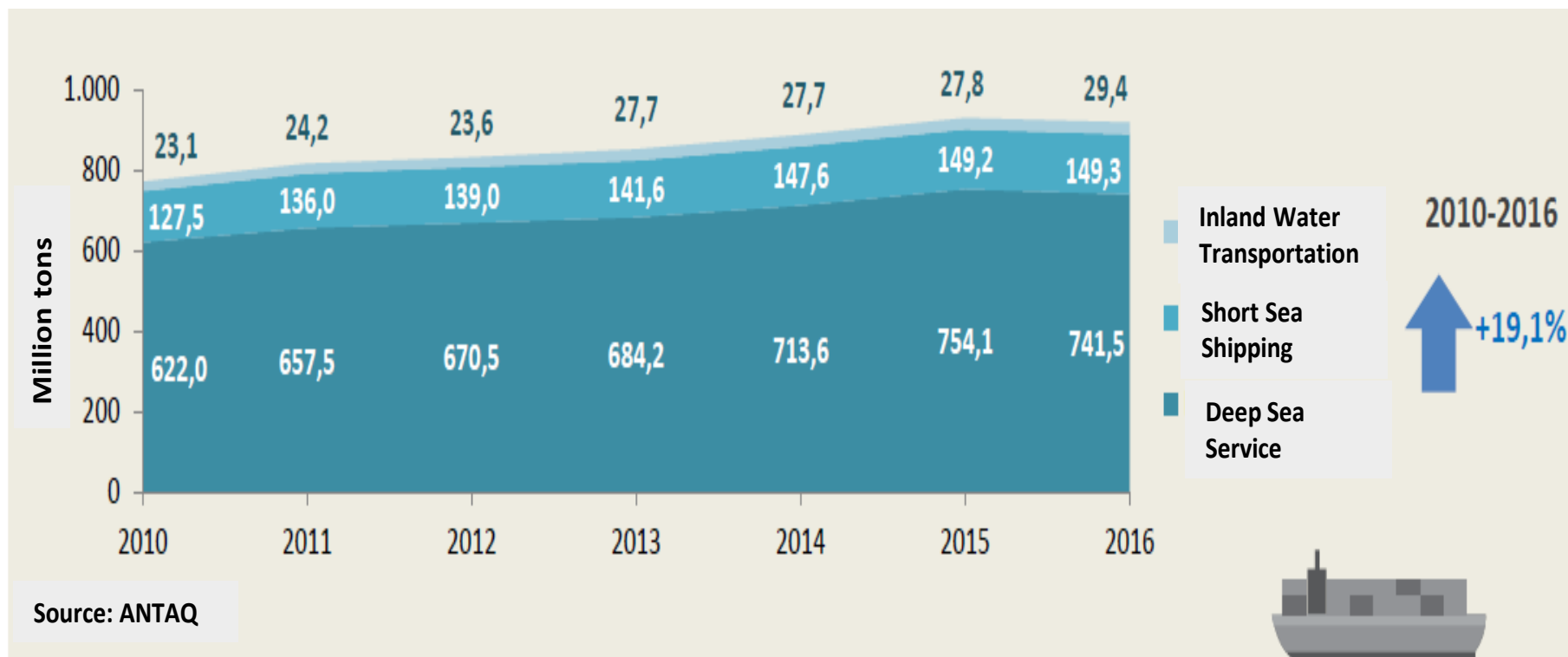
➤ The largest companies are Petrobras/Transpetro, Aliança, Norsul, Elcano, Log-in and Mercosur.

Methodology

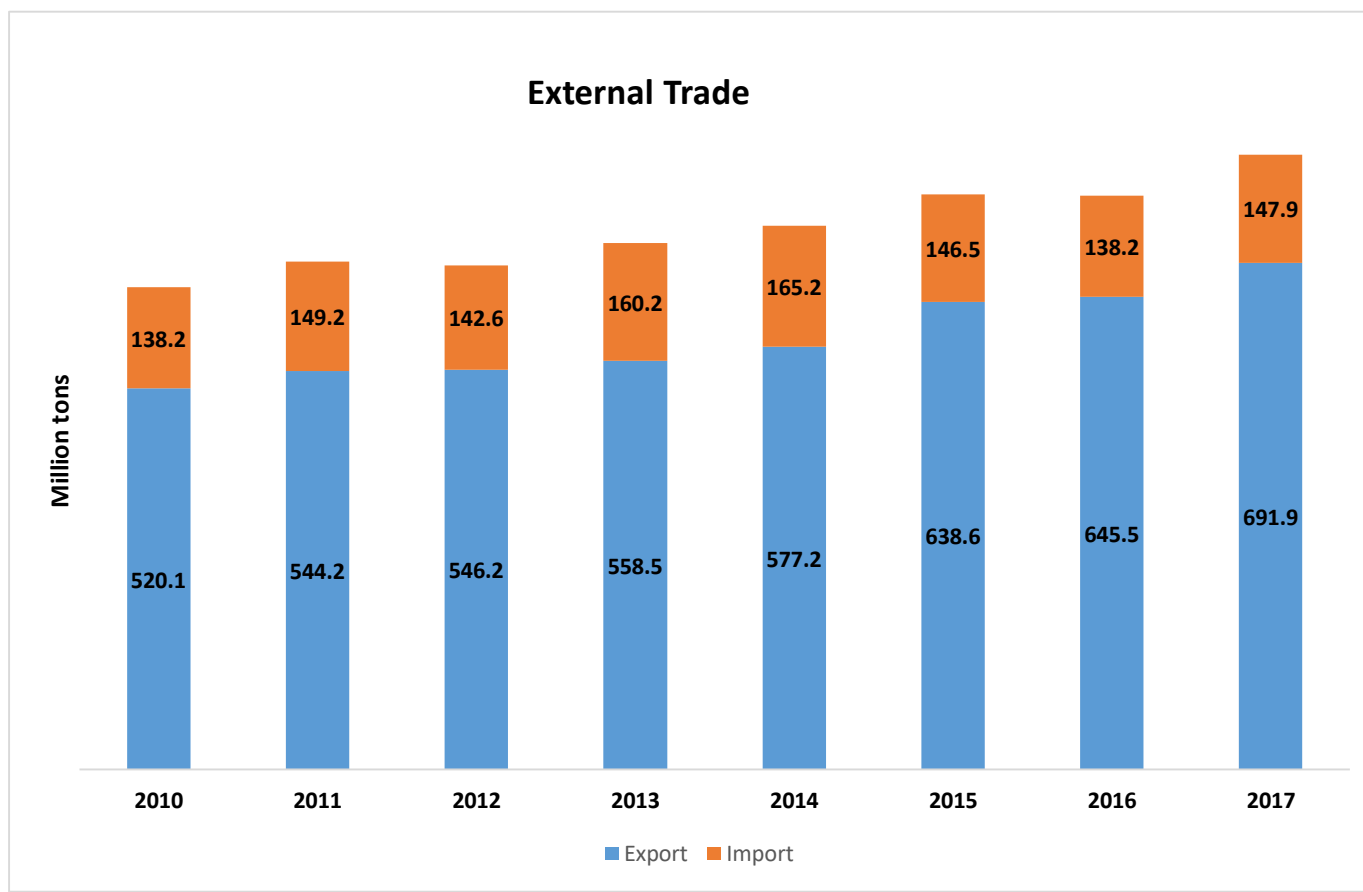
- To achieve the objectives it is used exploratory research, involving a bibliographical (scientific articles/paper) survey about the theme and data collection.
- After it applied a Survey in navigation companies.

Features of Transport System in Brazil

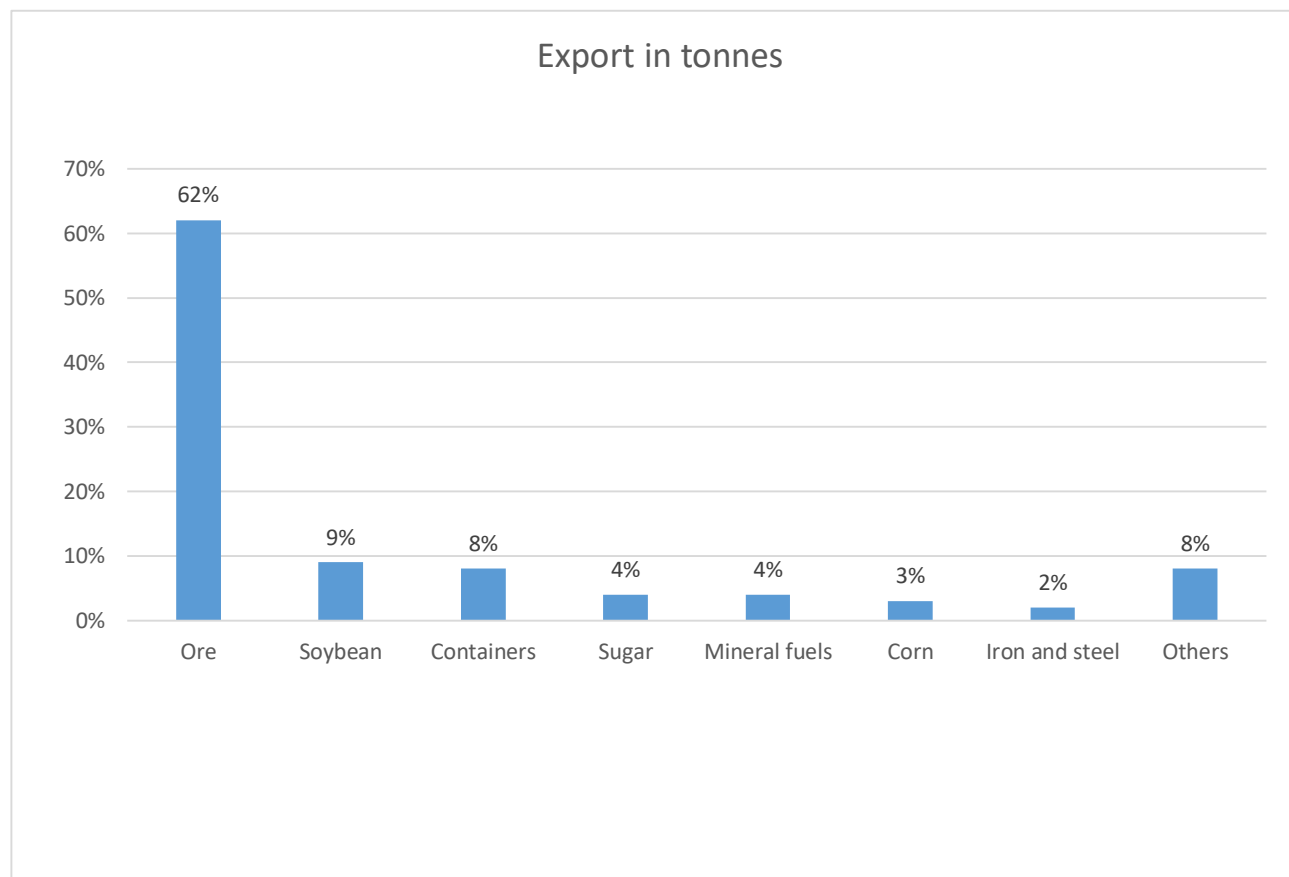
➤ Waterway movement, in millions of tons, by segment:



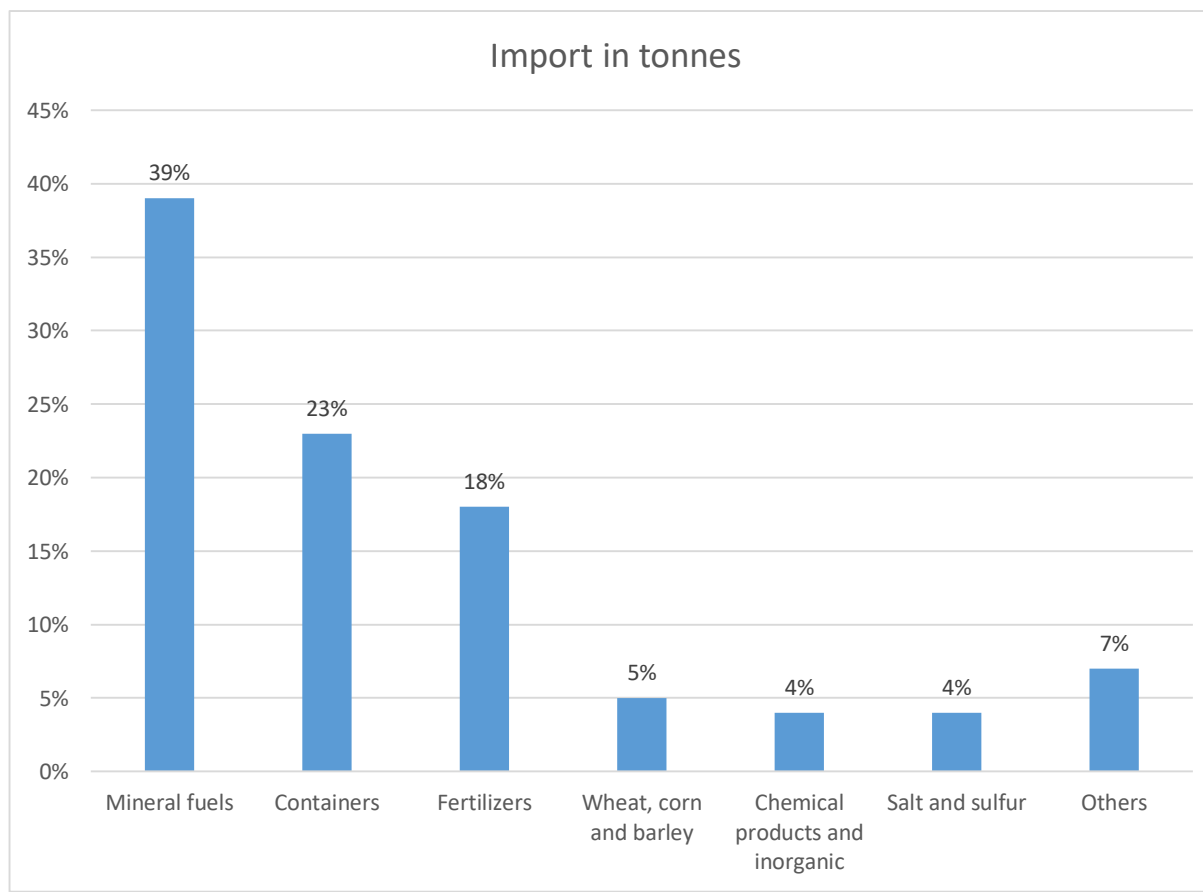
Main products transported imported and exported by sea shipping



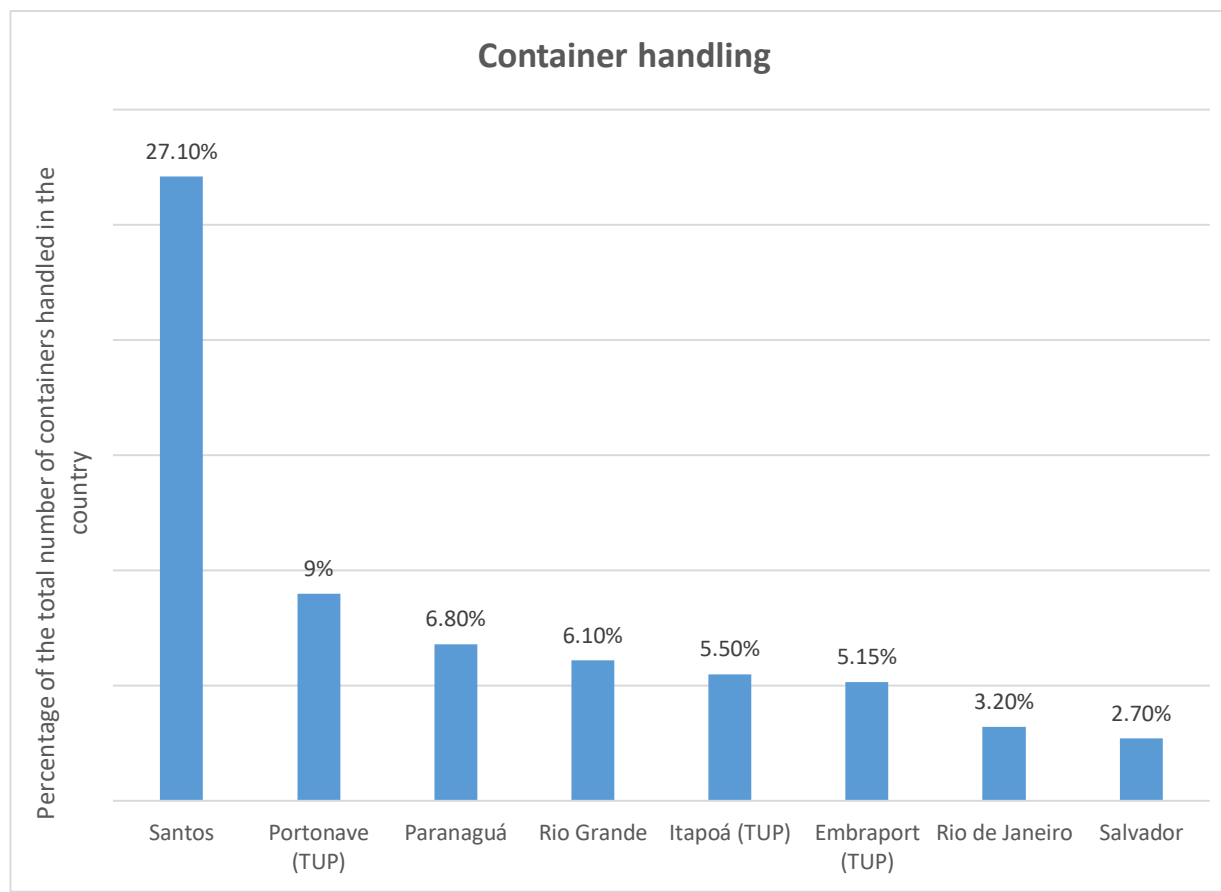
Main products **exported** by Brazil over the last years, which require water transport



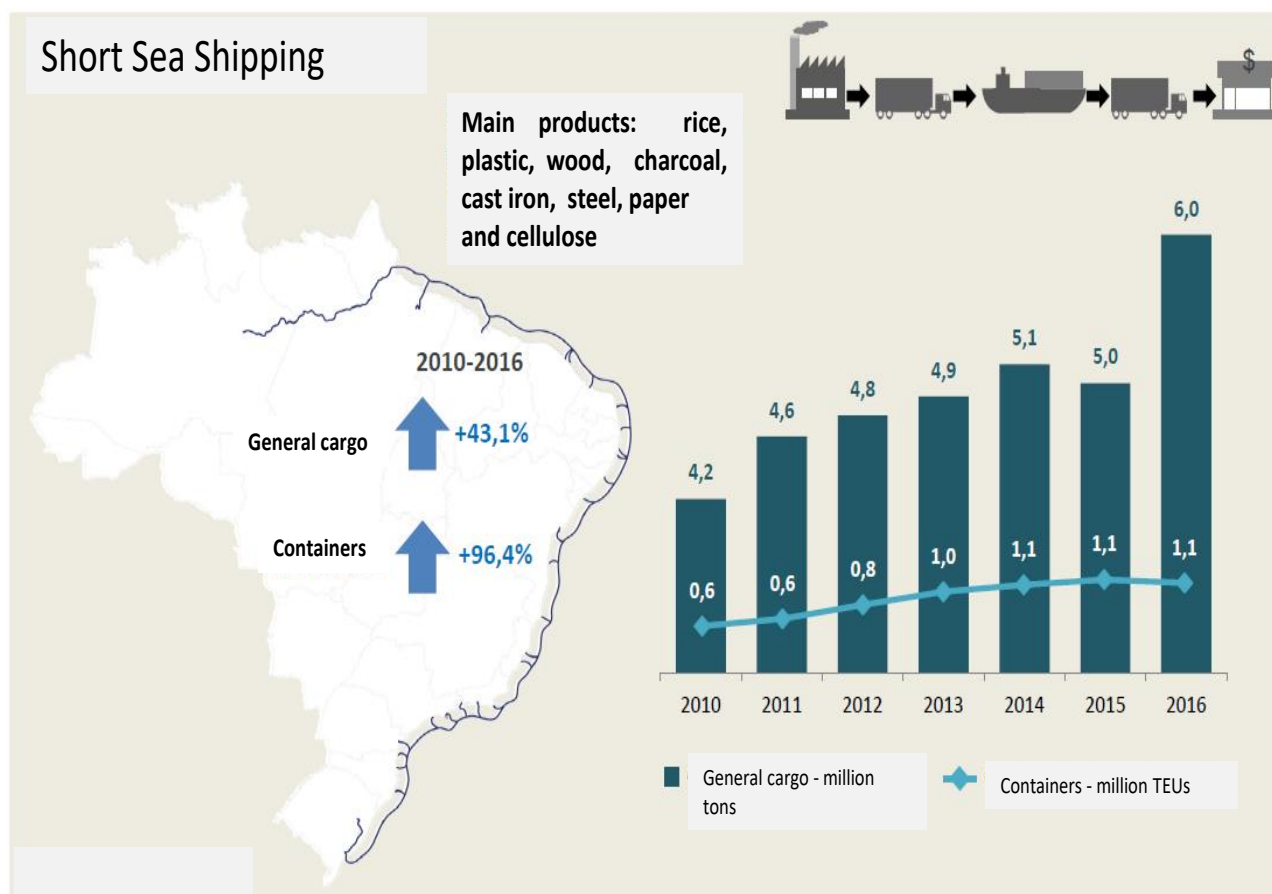
Main products **imported** by Brazil over the last few years, which require water transport



Percentage of the total number of containers handled in the country, in the main ports and private terminals



The growth in cabotage/short sea shipping transport in Brazil, over the years 2010 to 2016



Features of Transport System in Brazil

- There is intense competition in the road modal for the transportation of cargo in Brazil, compared to the maritime modal.
- Most of the cargo in Brazilian transportation is by road (approximately 61.1%).

Features of Transport System in Brazil

- Operating in the potential markets requires frequency and reliability of the services provided, minimization of intermodal costs, a team vision, control of operations, integrated systems, own or outsourced intermodal structure, intermodal terminals and integrated decision making.

Factors that can improve the shipping industry

- To think of cabotage/short sea shipping always in an integrated way with road and rail transportation, and as a door-to-door service;
- Regulate the cargo transshipment process to reduce bureaucratic procedures and facilitate the emergence of feeder service for Brazil and Latin America;

Factors that can improve the shipping industry

- Invest in information technology to integrate modalities, facilitate the tracking and clearance of cargo and allow optimized decision making by the cargo transporter;
- Invest in the integration of communication systems between the Latin American ports aiming at the Latin American feeder service and a possible integrated market in the medium term;

Factors that can improve the shipping industry

- ANTAQ, as a regulatory agency, should create a mechanism for releasing MMF (Merchant Marine Fund) resources and related accounts, with the objective of protecting the national fleet, to guarantee the supply of vessels in the future and the technological advancement of the fleet for the transportation of containers;

Factors that can improve the shipping industry

- Invest in computerized systems to monitor the cabotage/short sea shipping routes, companies involved and freights practiced and identify the possible formation of cartels;
- Carry out institutional campaigns on the advantages of cabotage/short sea shipping transport for the user and for transport operators interested in entering the sector.

Features to be modified

- Ensure, as a regulatory agency, that coastal shipping vessels will not be blocked by port service, due to congestion or the least economic interest in their service;
- Act to reduce the number of port taxes applied in cabotage/short sea shipping, to reduce bureaucracy and rationalize the taxation of the sector;

Features to be modified

- Ensure, as a regulatory agency, the isonomy in the amount paid by fuels for coastal vessels;
- To monitor supply and demand in the shipbuilding market: shipyards, orders under construction, portfolio orders, the age of the fleet, the forecast of renewal, resources available in the MMF, among others;

Features to be modified

- Invest in information technology to monitor the Brazilian port productivity.
- Act within the MMF to accelerate the release of resources and protect the national fleet;
- Invest in institutional advertisements on the advantages of coastal shipping re-garding lower emissions of pollutants and greater road safety.

Conclusion

- Brazil can mirror the international model, such as that implemented in the European Union, to develop its potential for cabotage transport.
- The European Union uses these modes in an integrated way and exploits the potential of each one, aiming to eliminate or reduce obstacles along the entire transport chain and optimizing the role of each modal within a sustainable transport corridor.

Conclusion

- Brazil needs to put into practice public and private policies that encourage the use of maritime transport along its coast.
- Integrating with other modalities and reducing bureaucracy and optimizing the transportation system.
- Increase the frequency of cabotage routes to attract more cargo to this transportation system.

Conclusion

- Increase the speed of delivery of merchandise and greater versatility in the service offered to the market.
- Have a feeder service organized for Brazil.
- Solve the port congestion system to promote cabotage transport further.
- Have well structured transshipment areas to carry out the operations with the other modes in the integrated transport system.

Thanks Very Much for Your Attention!

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