

IAPH PANAMA 2016



2016/7.20

IAPHパナマシティ中間年総会に出席して



横浜港埠頭株式会社
Yokohama Port Corporation

PANAMA



展示会場、ブース・各委員会、セッション等

ATLAPA CONVENTION CENTER



展示会場 IAPH BALI 2017



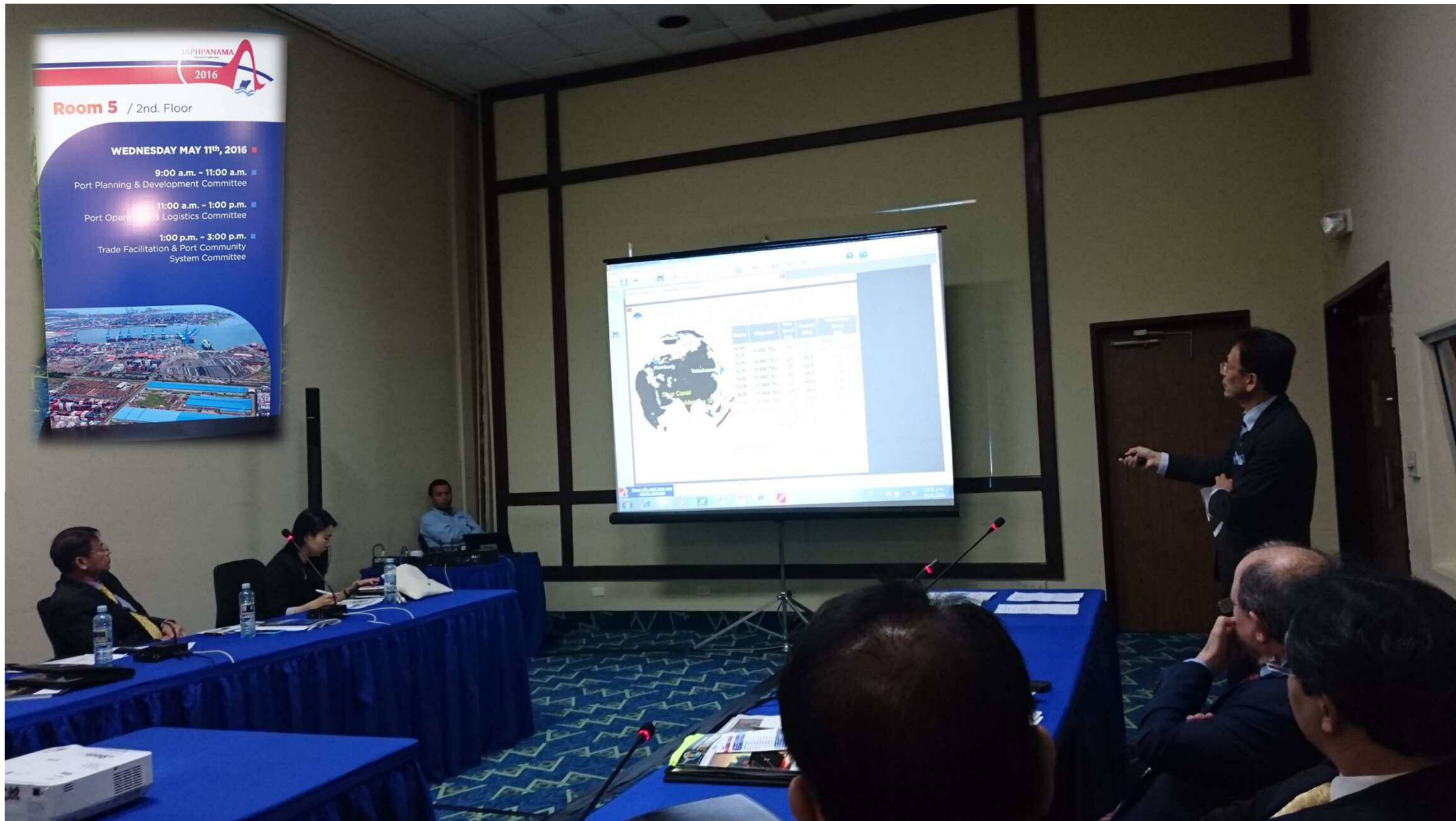
展示会場



Welcome Reception



Port Planning & Development Committee



Session Punta Rincon Port—A new Port for Panama's new copper mine

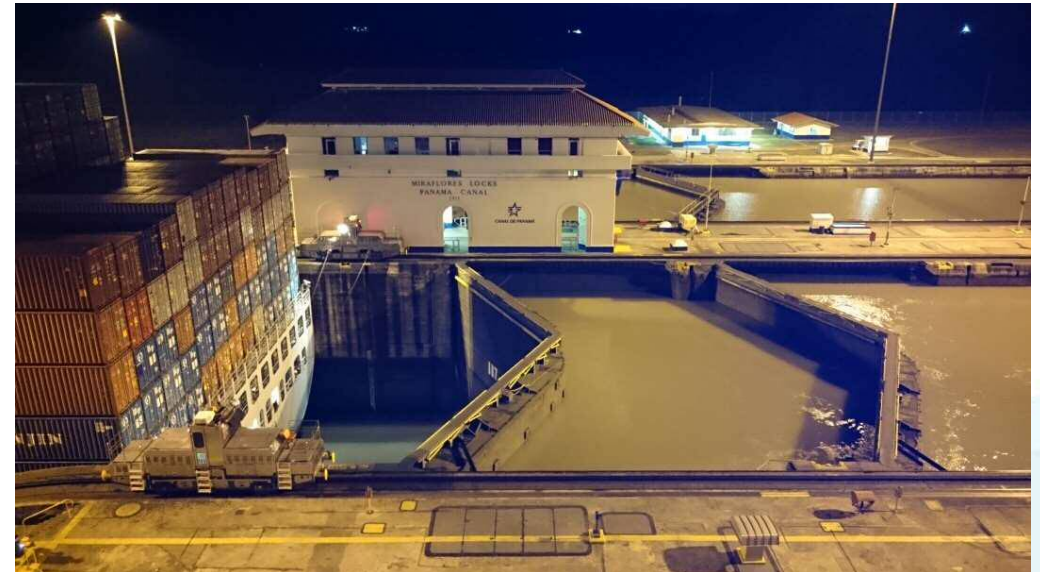


現場視察（パナマ運河等）

Miraflores Locks of the Panama Canal



Miraflores Locks of the Panama Canal



Miraflores Locks of the Panama Canal ★動画①



Miraflores Locks of the Panama Canal ★動画②



Miraflores Locks of the Panama Canal ★動画③



Expansion Observation Center Panama Canal 拡張運河(大西洋側)



Expansion Observation Center Panama Canal 拡張運河(大西洋側)



Technical Visit Manzanillo International Terminal



Technical Visit Manzanillo International Terminal



セッション発表資料より

パナマ運河拡張：世界海上貿易の再定義



Panama Canal Expansion: Redifining World Seaborne Trade

Óscar Bazán

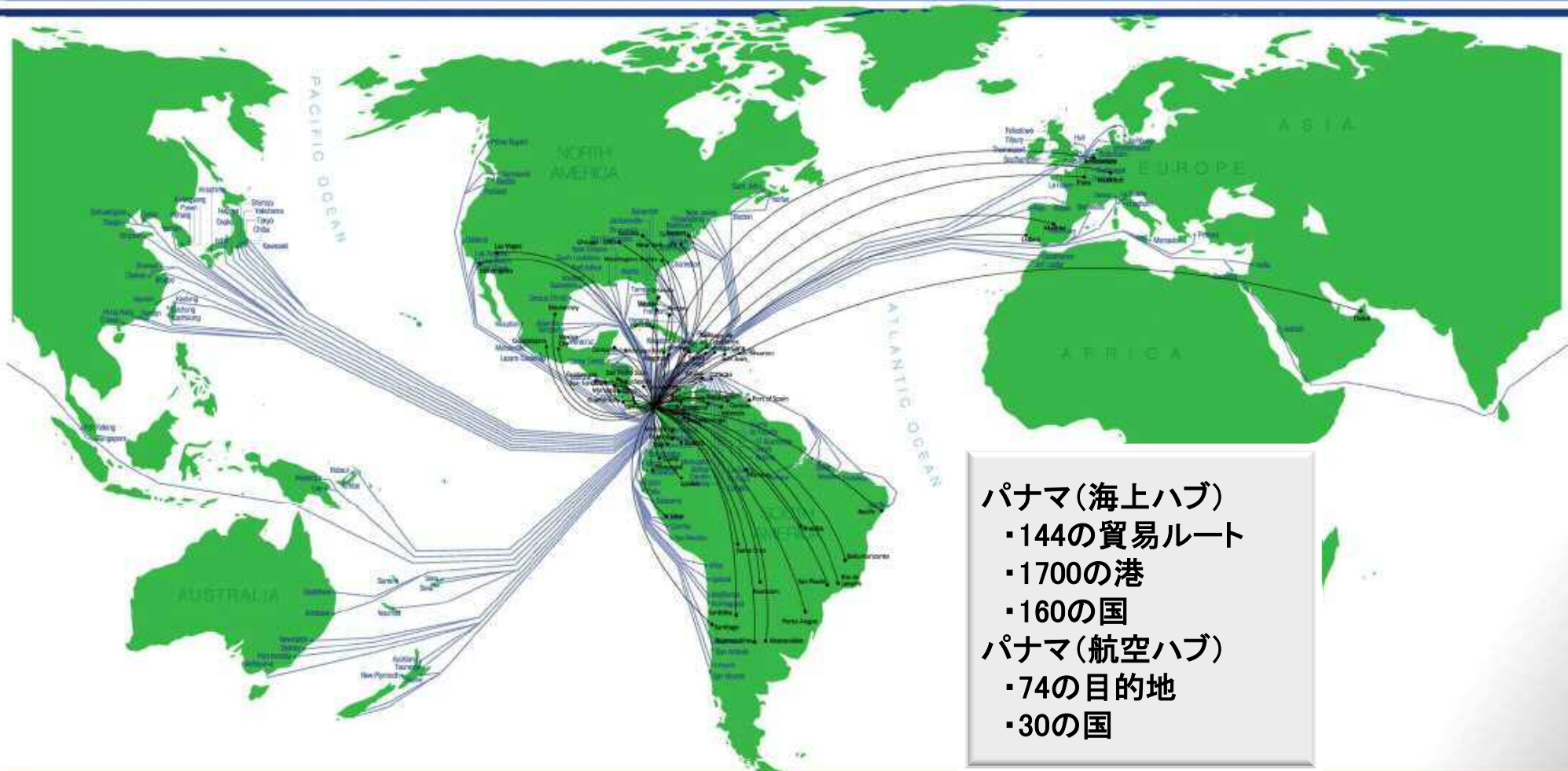
Executive Vice-President – Planning and Commercial Development
Panama Canal Authority

パナマ運河拡張:世界海上貿易の再定義

Panama: the transportation and logistics hub of the Americas



Achieving the maximum potential of our geographical position



- パナマ(海上ハブ)
- ・144の貿易ルート
 - ・1700の港
 - ・160の国
- パナマ(航空ハブ)
- ・74の目的地
 - ・30の国

パナマ運河拡張:世界海上貿易の再定義

The Panama Canal Trade and Main Users



Total Cargo Movement FY 2015

USERS	FY 2014*	FY 2015*
United States	154.1	160.8
China	51.5	48.4
Chile	29.5	29.5
Japan	21.7	22.9
Peru	16.5	18.8
South Korea	19.1	18.5

日本は世界第4位のユーザー

Total cargo movements 229.1 million long tons.

70% of Canal cargo traffic originates in, or is destined to, the United States

*Measured in Million of Long Tons

パナマ運河拡張: 世界海上貿易の再定義

The Expansion Will Significantly Enhance the Canal's Global Competitive Position

Relevant Vessel Capacity Increase

Panamax

965 ft
106 ft

Maximum capacity of transiting vessels 5,000 TEU

New Panamax

1200 ft
160 ft

Maximum capacity of transiting vessels 14,000 TEU

Higher capacity to strengthen ACP's market position

Operational Optimization with Economies of Scale

Exporters

Shipping Lines

Importers

Consumers

Economies of scale - Efficiencies in the supply chain - Connectivity

Increasing Market Participation Persuading New Players to Consider the Panama Canal Route

- ✓ The Expansion will increase LOA of vessels from 965 to 1200 feet.
- ✓ Maximum transported capacity increase from 5,000 TEU to 14,000 TEU
- ✓ Just-in-time; Reservation System
- ✓ Tariff incentives for new market segments and ballast traffic.

Source: ACP
(1) Deadweight Tons

Container Vessels	Dry Bulk	Liquid Bulk	LNG / LPG
5,200 to 14,000 TEU new volumes from: • Latin America • Recover market from: • West Coast United States • Suez Canal	Up to 170,000 DWT ⁽¹⁾ • Coal from Colombia • Metallurgical coal from Vancouver • Iron Ore from Brazil in Minicapesize (85,000-120,000 DWT)	Up to 150,000 DWT • Tankers • Petroleum Products	LNG Up to 177,000m ³ and VLGC

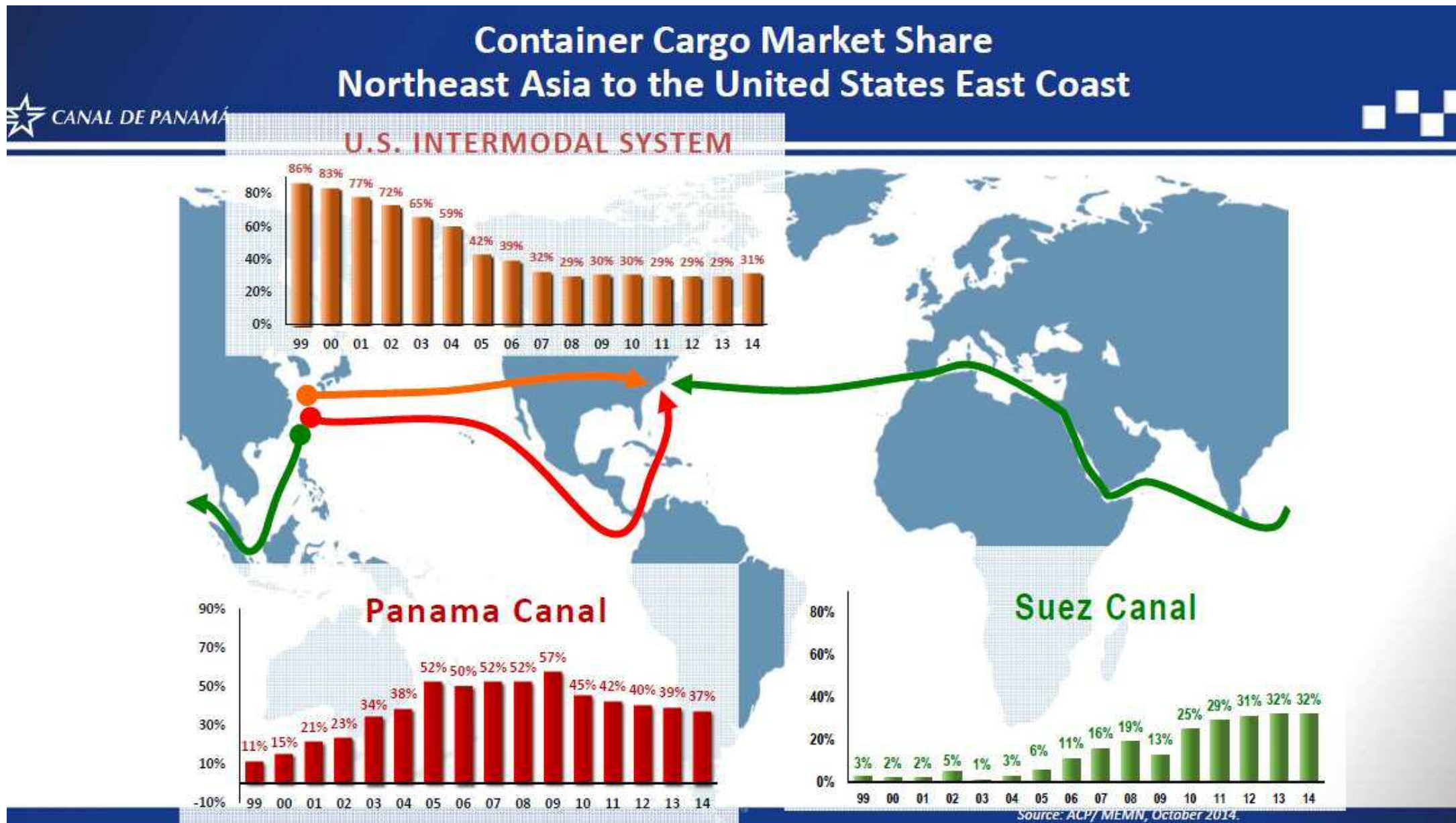
パナマ運河拡張: 世界海上貿易の再定義

Container Cargo Market Share Northeast Asia to the United States East Coast



Source: ACP/ MEMN, October 2014.

パナマ運河拡張: 世界海上貿易の再定義



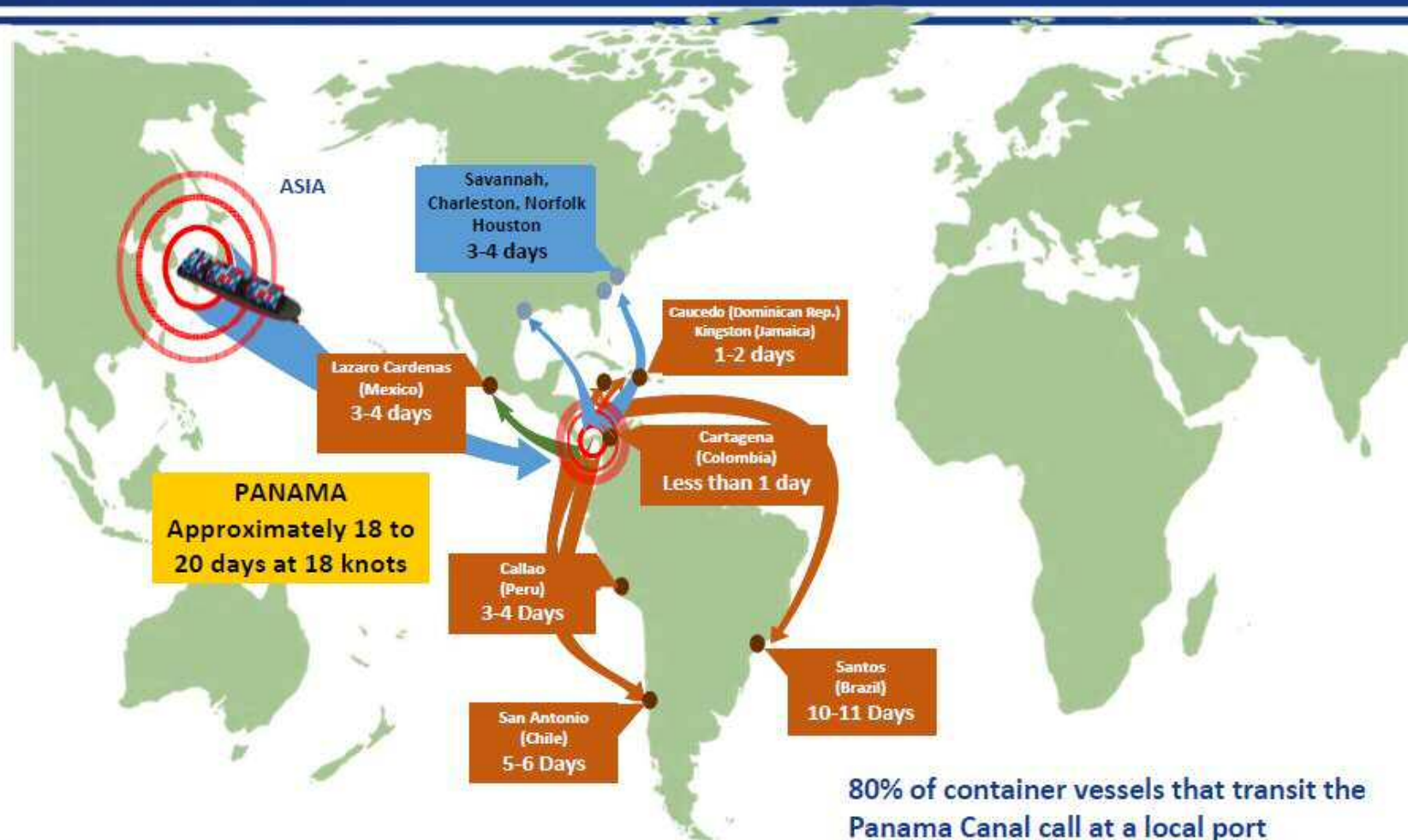
パナマ運河拡張:世界海上貿易の再定義

Potential LNG shipments to Asia



パナマ運河：更なる発展のチャンス

The Panama Canal It is all about reliability, connectivity, and value added services



パナマ運河：更なる発展のチャンス

Latin American Population / Projected Growth - 2010-2030



Mexico +18.9%
Pop: 135M

Caribbean, Cuba, Puerto Rico, Dominican Republic, Jamaica, Haiti +11.0%
Pop: 42M

Guatemala, El Salvador, Belize, Honduras, Nicaragua +28.0%
Pop: 19M

Costa Rica, Panama +23.0%
Pop: 9M

Colombia, Venezuela +22.0%
Pop: 88M

Ecuador, Peru, Bolivia, Chile +20.0%
Pop: 85M

Uruguay, Paraguay, Brazil +18.0%
Pop: 251M

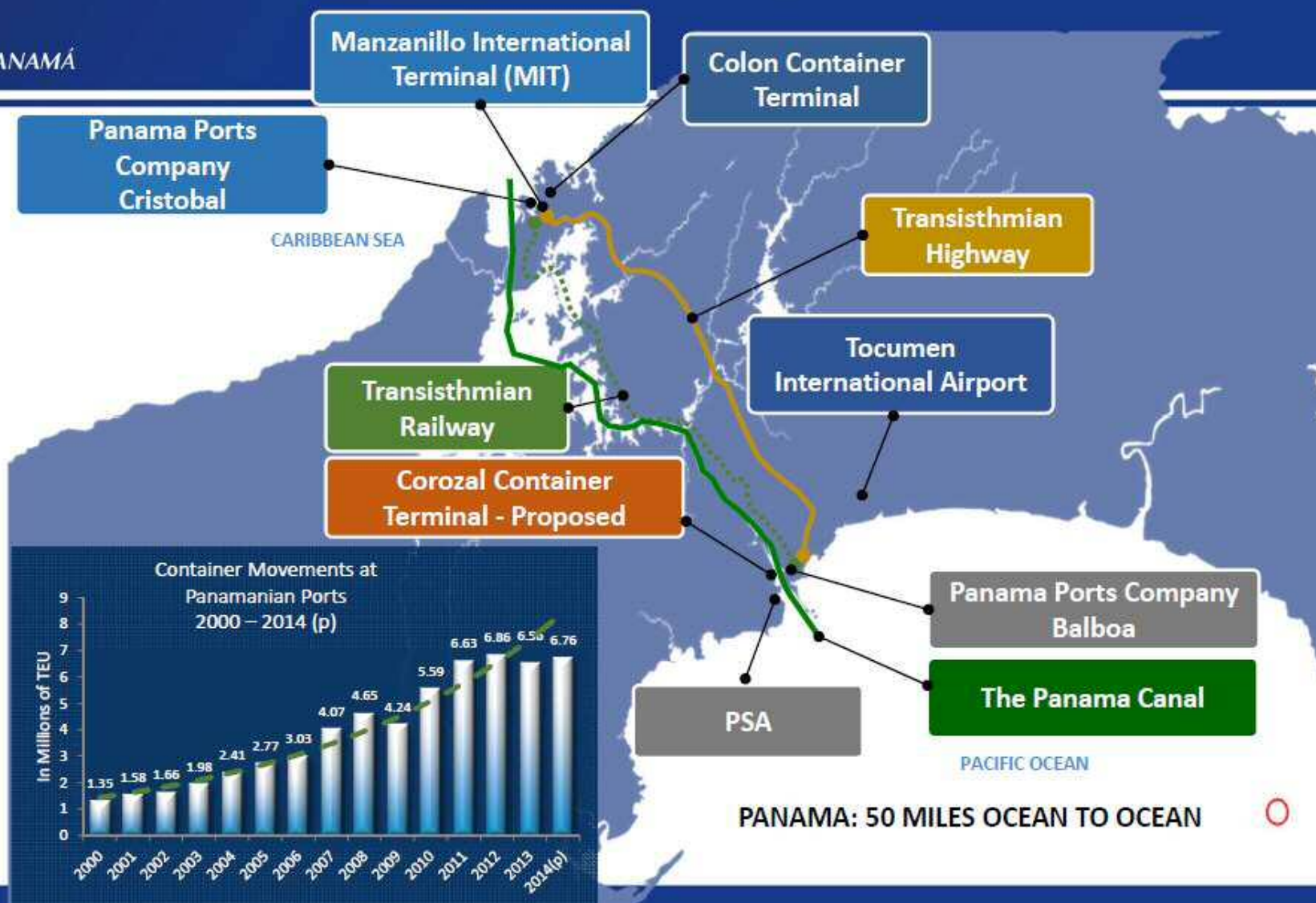
Argentina +17.0%
Pop: 48M



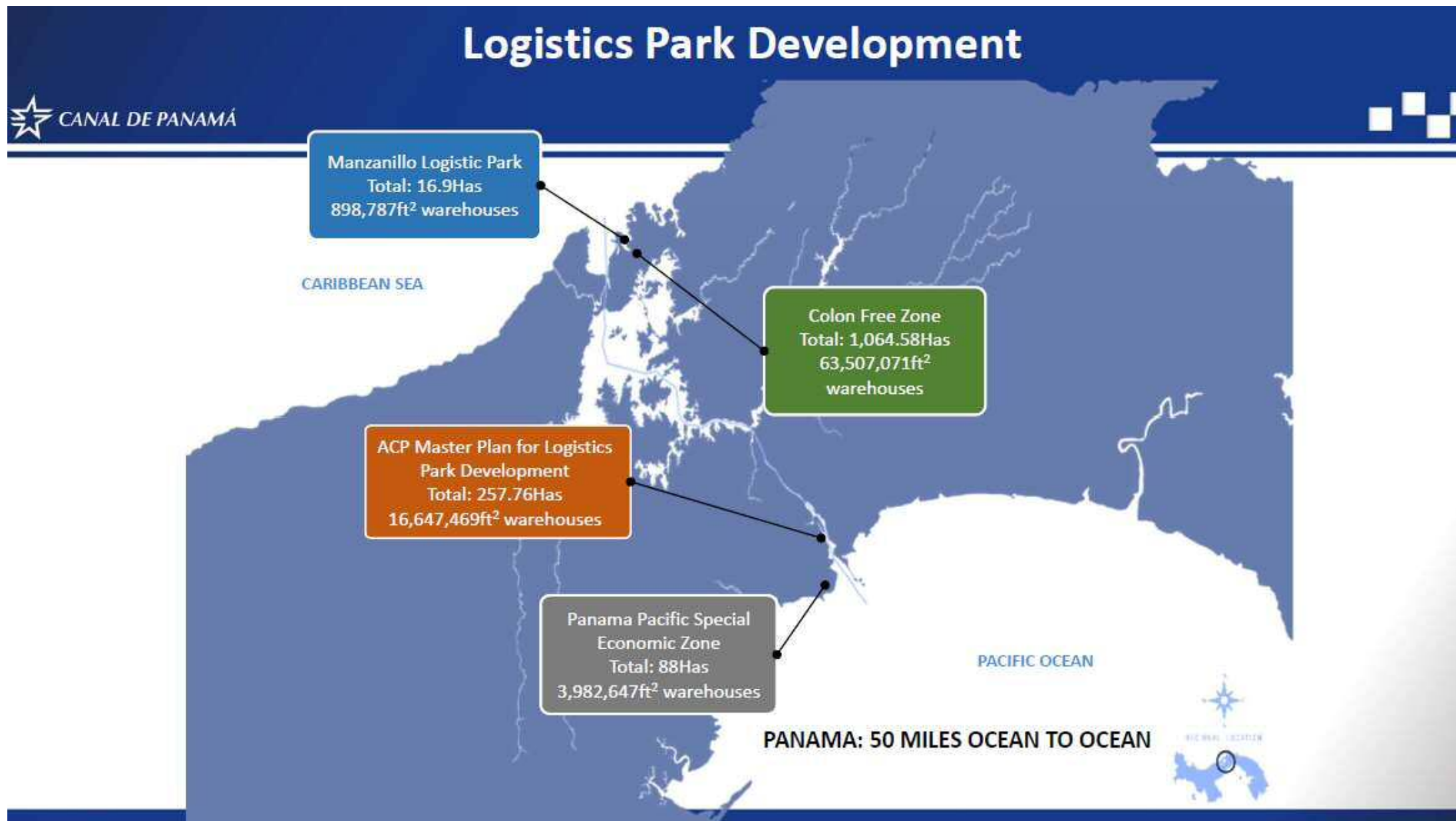
Source: «US CENSUS: International Database»

パナマ運河：更なる発展のチャンス

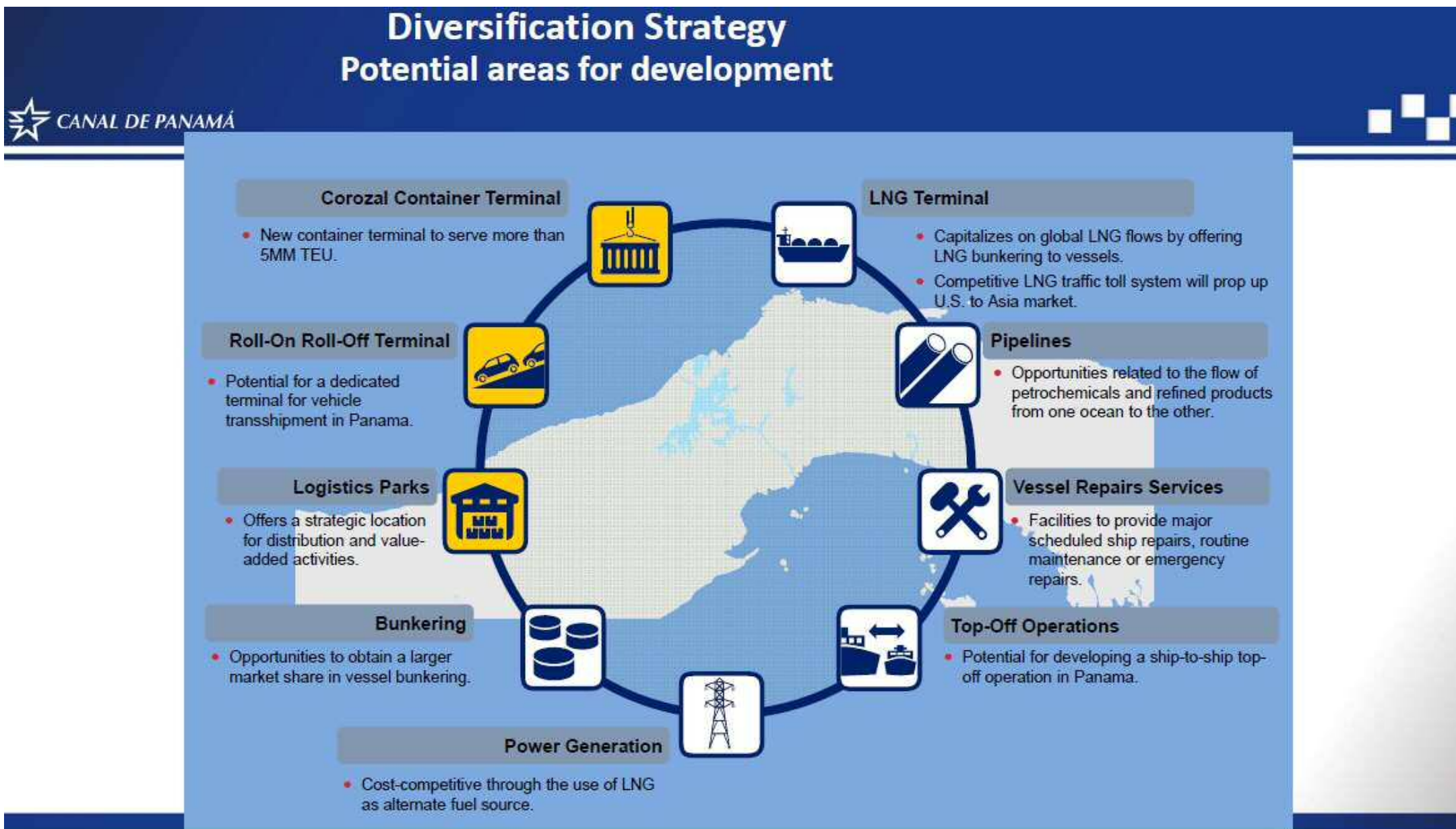
Panama's Logistics Cluster Support Infrastructure



パナマ運河：更なる発展のチャンス



パナマ運河：更なる発展のチャンス



視察のまとめ

★視察のまとめ(パナマ運河が注目される理由)

距離

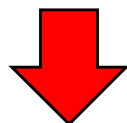
- 距離が短く、運賃を安く抑えることができる
- その他の経費は別として、燃料費がスエズ・ルートの場合よりも約57.6%、マゼラン海峡ルートの場合よりも約81.4%節約できる
- 船舶の種類やスピードによるが、太平洋から大西洋に抜けるルートとして、パナマ運河経由であれば、マゼラン海峡ルートと比べ21日間短縮できる
※スエズ運河・マゼラン海峡ルートとの比較

船舶

- LNG・LPG船通行が可能
- コンテナ船は容量で約2.7倍
- ばら積み船も重量で2倍以上

インフラ

- 都市鉄道交通やパナマシティの地下鉄などの整備が進んでいる
- 空港では路線網の広さ世界8位のコパ航空を擁している



政府が『中南米のハブ』となる戦略を掲げインフラ機能の強化を推進

Gala Dinner “Panama : diversity of cultures and traditions”



ご清聴ありがとうございます

