



# Infrastructure Developments and Maritime Trade

**TOC Americas**

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PSA is a leading  
global port operator  
and trusted supply  
chain partner



**Ports**



**Marine  
Services**



**Logistics**



**Data  
& Digital  
Solutions**

**DRIVING SUSTAINABILITY**

**FOSTERING INNOVATION**

**STRENGTHENING CULTURE & LEARNING**

# PSA GLOBAL NETWORK



**PSA**  
42 Countries  
160 Locations  
66 Terminals

## ASIA

Bangladesh  
China  
India  
Indonesia  
Japan  
Malaysia  
Oman  
Qatar  
Saudi Arabia  
Singapore  
South Korea  
Thailand  
Turkey  
UAE  
Vietnam



## EUROPE

Belgium  
Czech Republic  
Denmark  
France  
Germany  
Ireland  
Italy  
Netherlands  
Poland  
Portugal  
Sweden  
Switzerland  
Spain  
United Kingdom



## THE AMERICAS

Argentina  
Brazil  
Canada  
Chile  
Colombia  
Panama  
Peru  
Uruguay  
USA



## AFRICA

Egypt  
Morocco



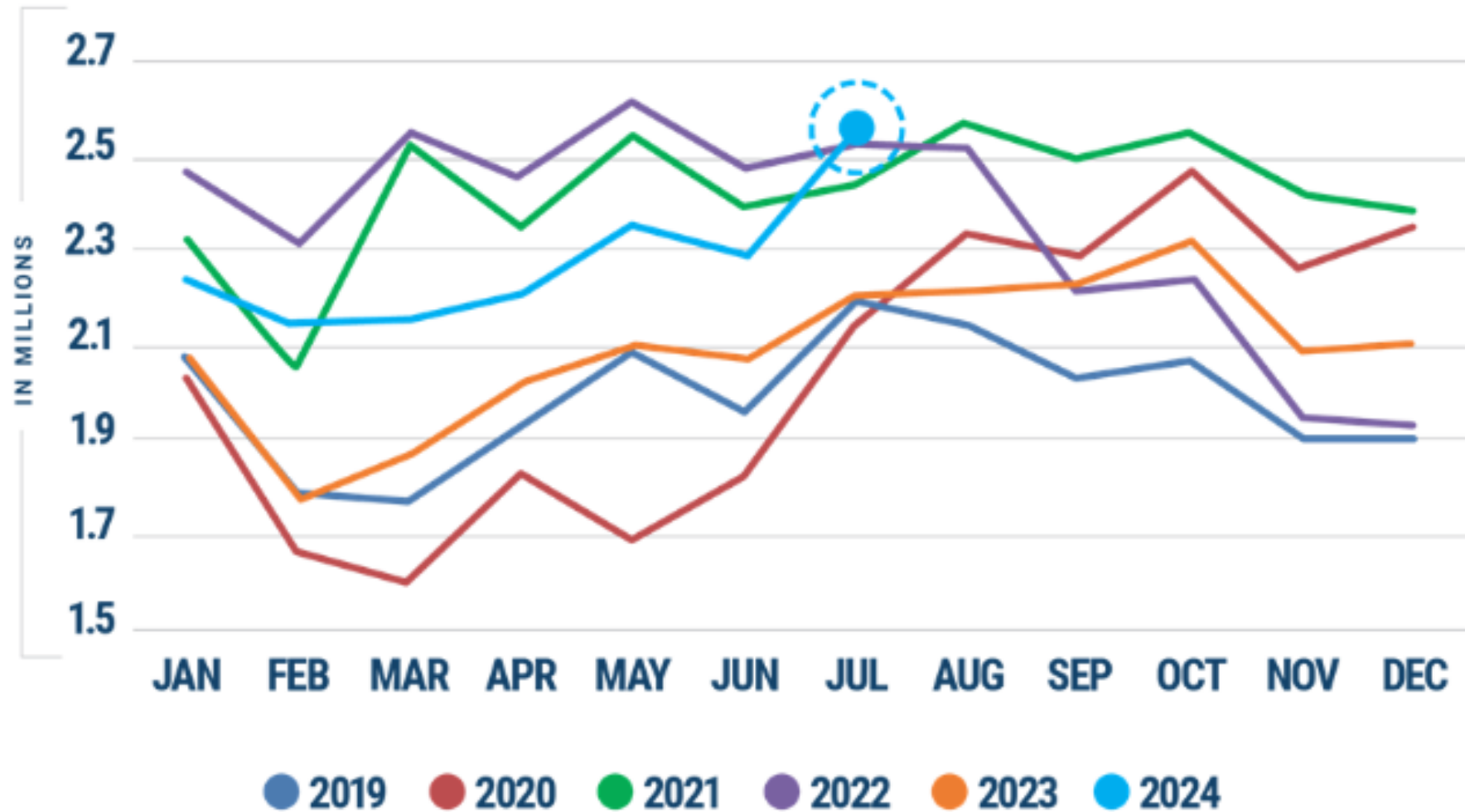
## OCEANIA

Australia  
New Zealand



# US container imports 2019 - 2024

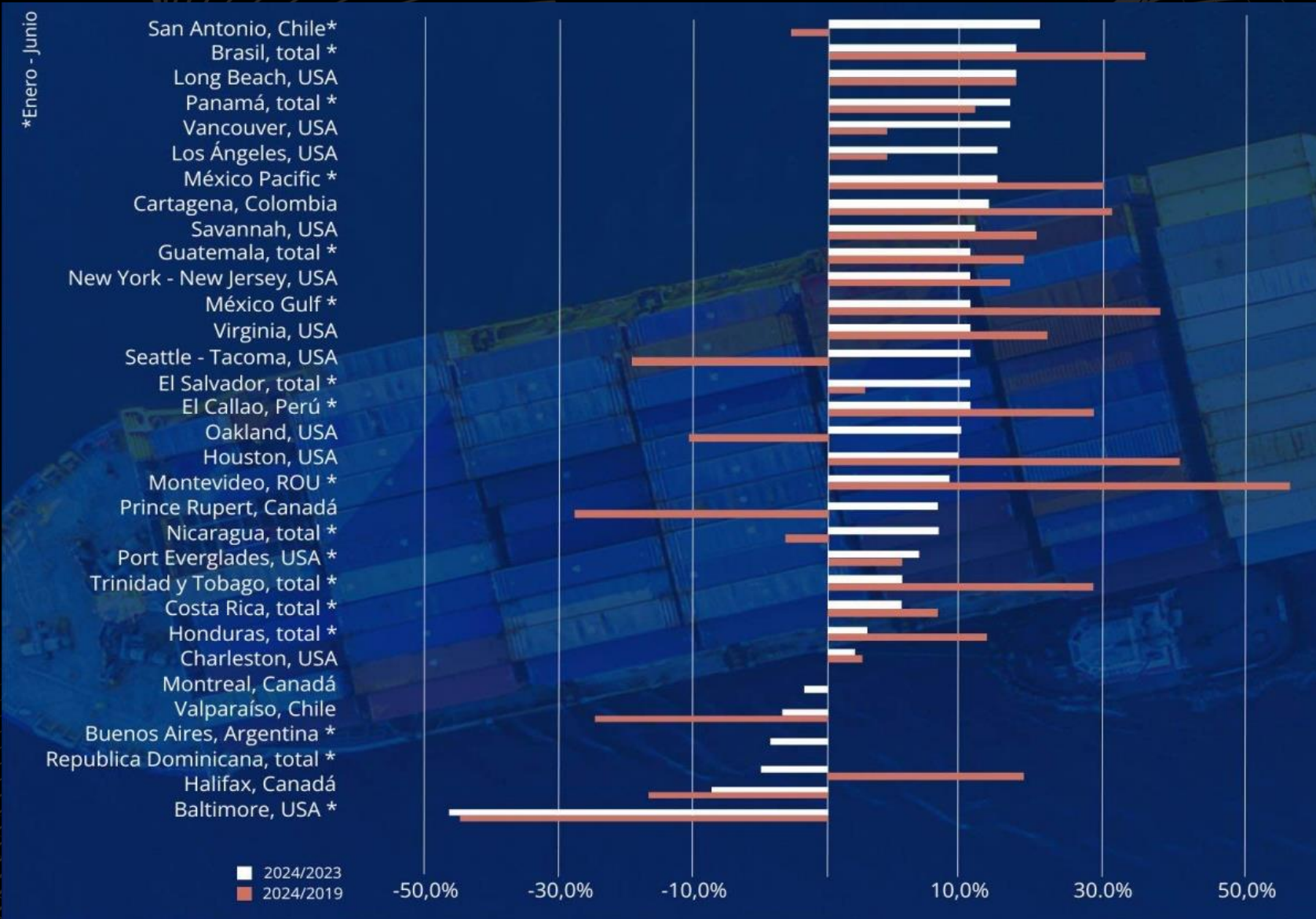
10% growth in 2024 – can it last ?





# Americas port growth 2019-2024

Mostly winners !

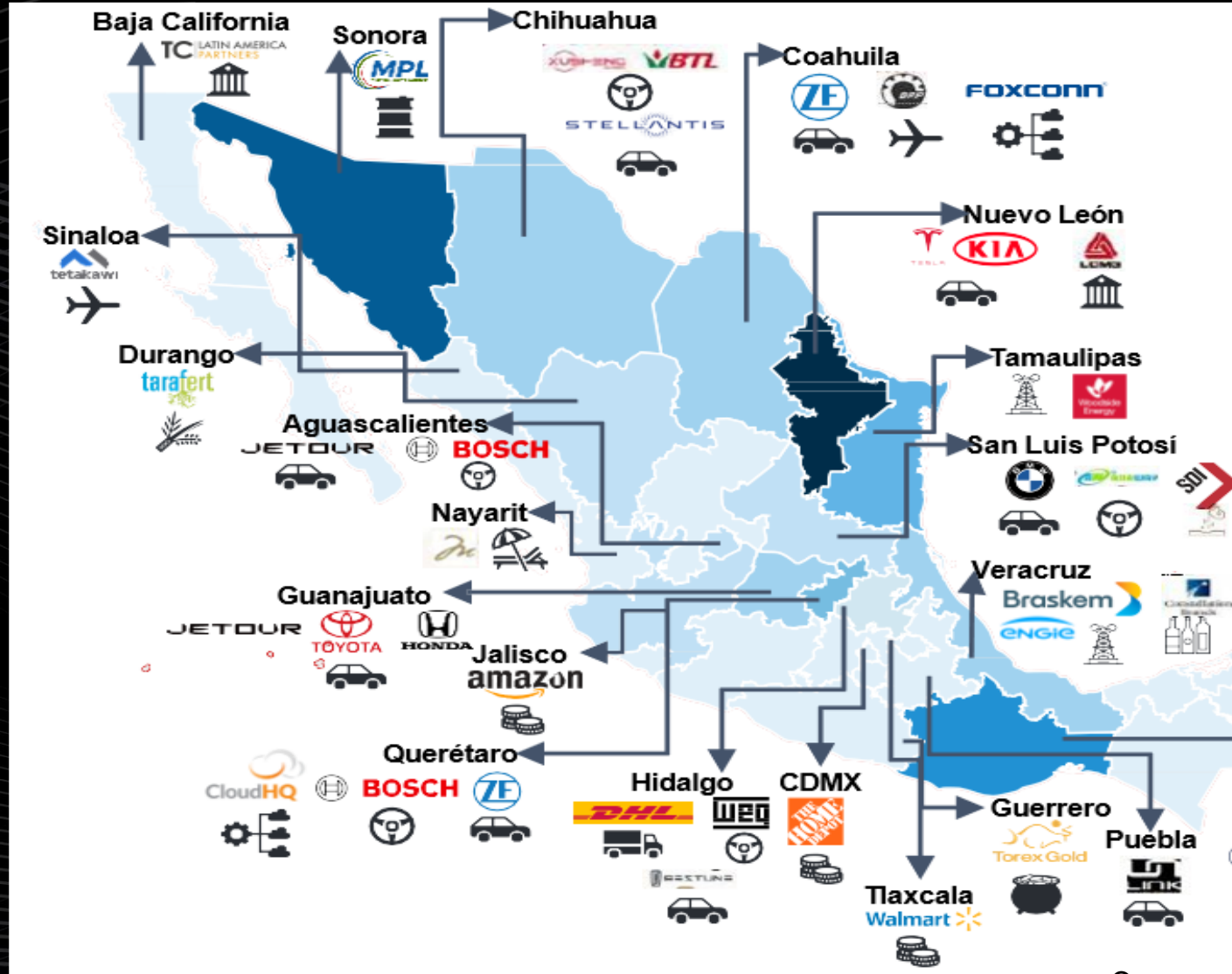


## 1H 2024 vs 2023

- Brazil: 20%
- Manzanillo (Mex): 12%
- Lazaro Cardenas: 33%
- Cartagena: 15%
- Panama: 19%

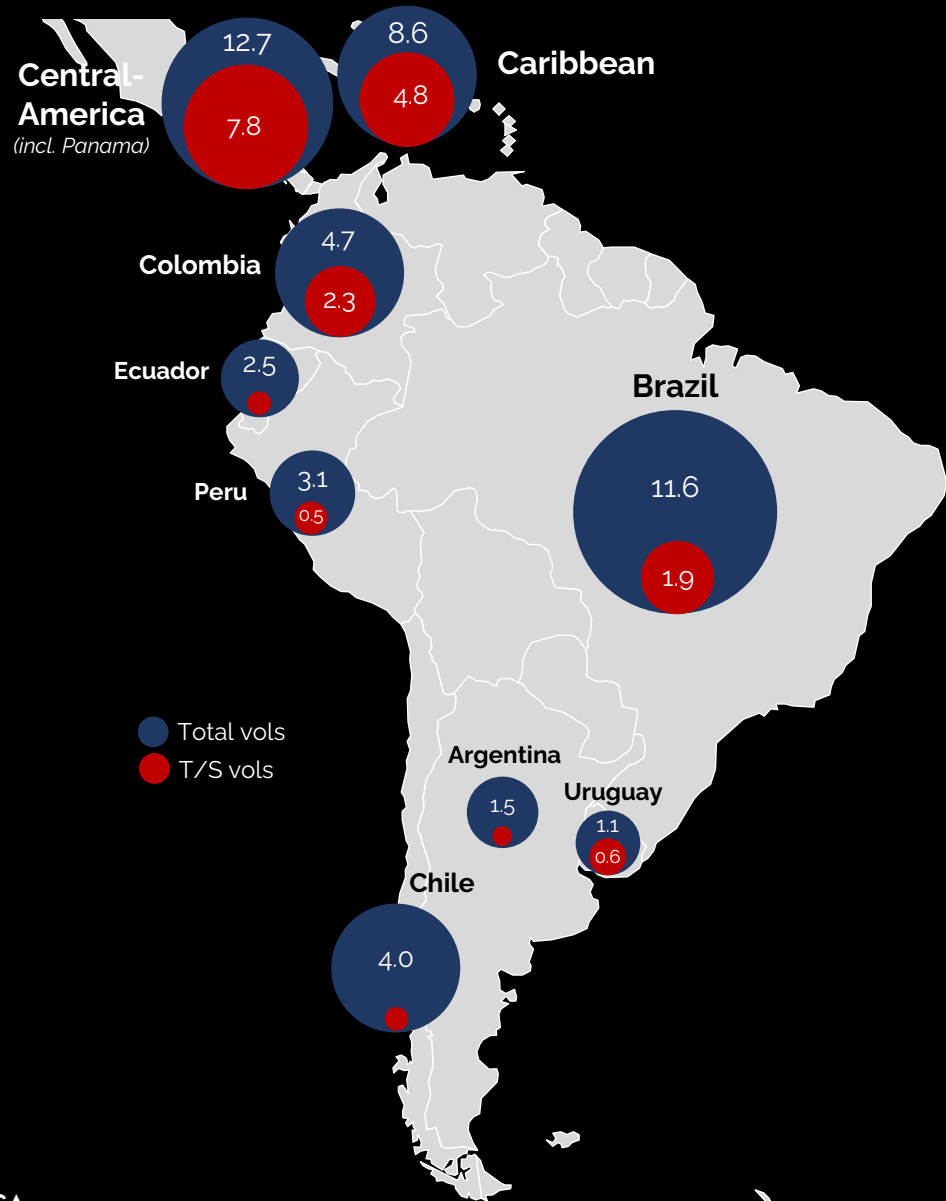
# Mexico: Nearshoring

New flows - displacing volumes



# LatAm container volumes

Low transshipment incidence meets the ultimate Hub & Spoke !

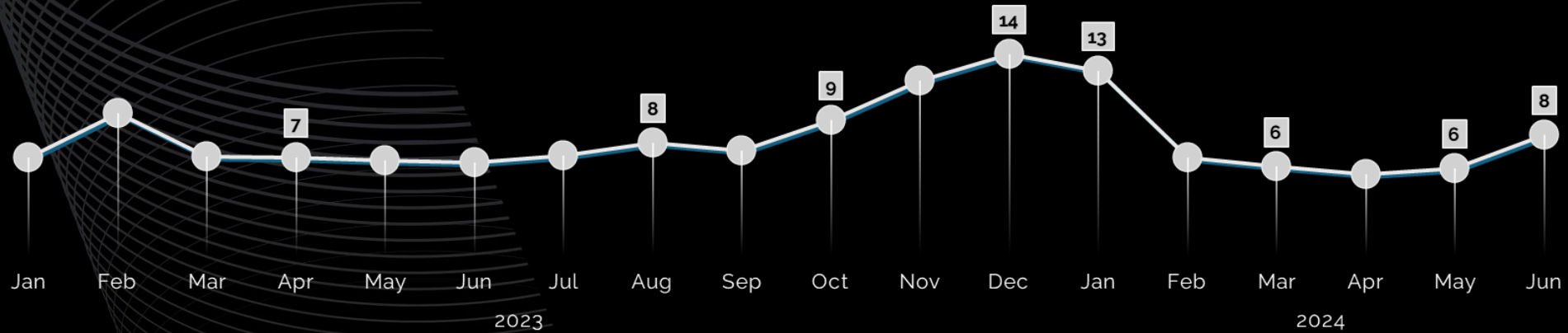




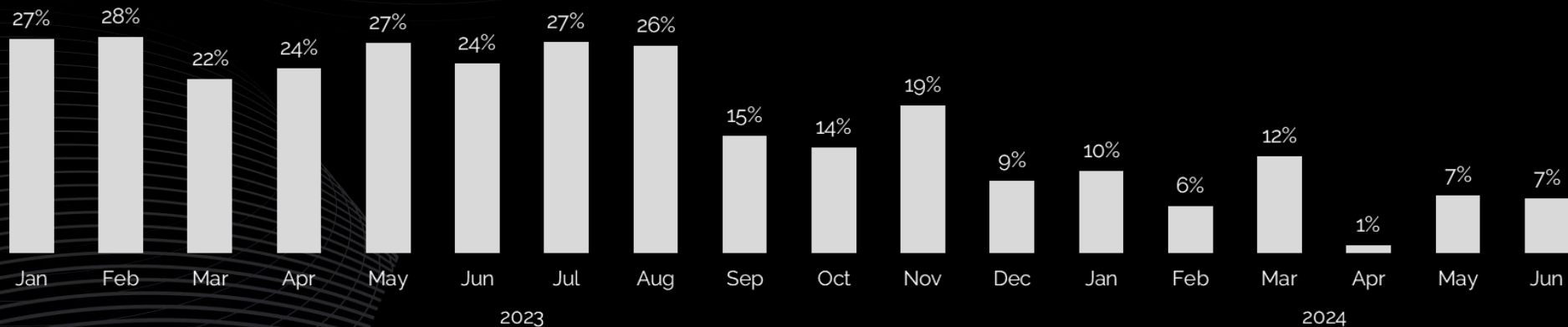
# Drivers of port capacity

What happened to our capacity ?

## Average Dwell Time



## Schedule reliability: Vessels arriving on Window





# Panama Canal water shortage

Keep cargo running – over water and over land !

## 2023-2024



Extreme drought due to *El Niño*

- Transits reduced from 34 to 24/day
- Draft lowered from 15.5 to 13.5m

## Today



- Operations back to normal
- PPIT Landbridge proved successful
- Long-term solutions:
  - New water sources and reservoirs
  - Enhance connectivity infrastructure



 **PSA PANAMA**



**Panama Canal expected to be operating at full capacity by September**



# New Port Projects

## Building for the long term

Roberts Bank Terminal 2 is a future marine container terminal on Canada's west coast (Delta, BC), led by the Vancouver Fraser Port Authority

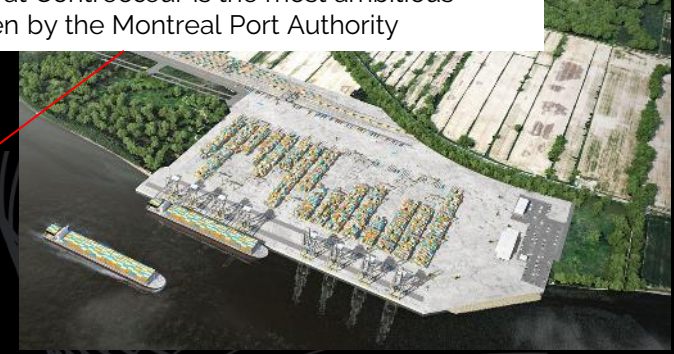


The Panama Canal Authority (ACP) is studying the feasibility of building a 3-4m TEU capacity terminal at Corozal on the east bank of the waterway where it owns 67 hectares of land

**Cosco Shipping Ports investing \$225m in Peru's Chancay terminal**



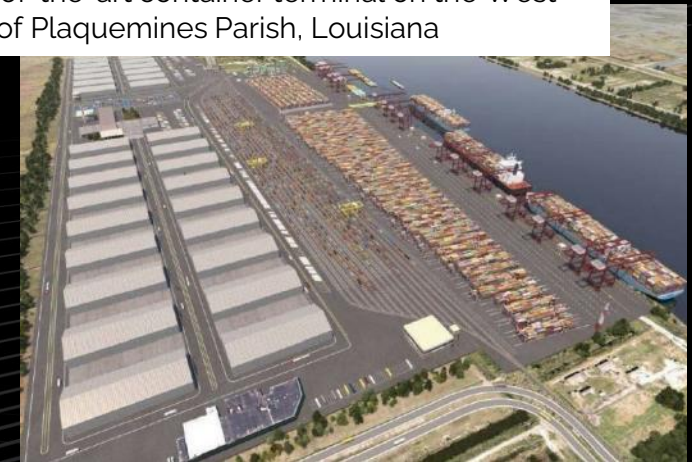
The expansion project at Contrecoeur is the most ambitious project ever undertaken by the Montreal Port Authority



The State of Delaware announced it will join the private operator of the Port of Wilmington, Enstructure, to build a new port terminal at a site in Edgemoor, Delaware

**Inside the Port of Virginia's \$450 million plan to lead in era of super-sized ocean containerships**

Plaquemines Port and APM Terminals have signed a letter of intent for the construction of a state-of-the-art container terminal on the West Bank of Plaquemines Parish, Louisiana





# PSA Singapore

World's largest transshipment hub



## PASIR PANJANG & CITY TERMINALS

- 45M TEU annual capacity

## TUAS TERMINAL

- 65M TEU\* annual capacity
- Advanced port technologies

\*Upon completion in 2040

## INDUSTRY ACTIVITIES

- Cold chain facilities
- Warehouses / Depots
- Intermodal capabilities

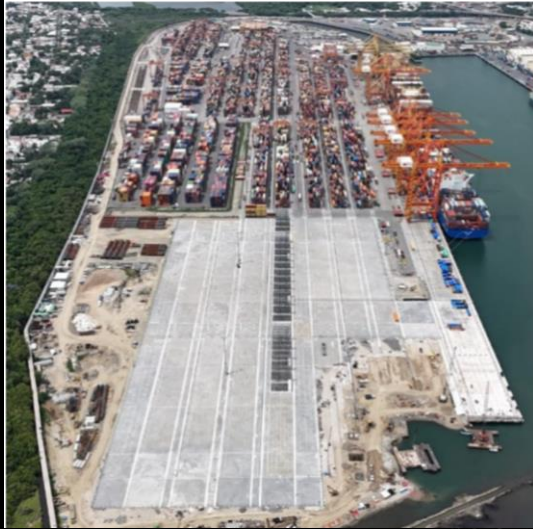




# Expansions

Adding capacity where needed

Contecon Manzanillo avanza en su expansión con la apertura de nuevos patios de contenedores



Port of Baltimore expansion project to add \$1.5 billion to Maryland GDP

APM Terminals Lazaro Cardenas has begun the construction of its Phase II USD140 million expansion. This project will increase the capacity of the first semi-automated facility in Latin America with an additional one million TEUs

**Port of Santos announces expansion timetable**

DP World has completed a major \$400 million expansion project at the Port of Callao in Peru, boosting container handling capacity at the South Terminal by 80%. Jun 21,



Terminal Cuenca del Plata ready to invest \$600 Million in expansion of Montevideo Port





# PSA in Argentina

## Buenos Aires: Rebuilding Berth 1 to handle mega-vessels





# PSA in Colombia

Buenaventura: adding berth and yard capacity

- Ability to handle 2 x > 366m vessels simultaneously
- The only terminal for 400m vessels
  - A. 300mts additional Quay (to 900m)
  - B. Dredging to reach 16,5 mts depth
  - C. Additional Yard
  - E. 2 Quay Cranes capable of 400m LOA
  - F. 3+5 RTGs additional





# Optimising capacity

Want faster results ? Want to spend less CAPEX ?

## Operational

- Dwell time
- Yard optimization
- Manning

## Tactical

- Yard density
- Equipment
- Automation

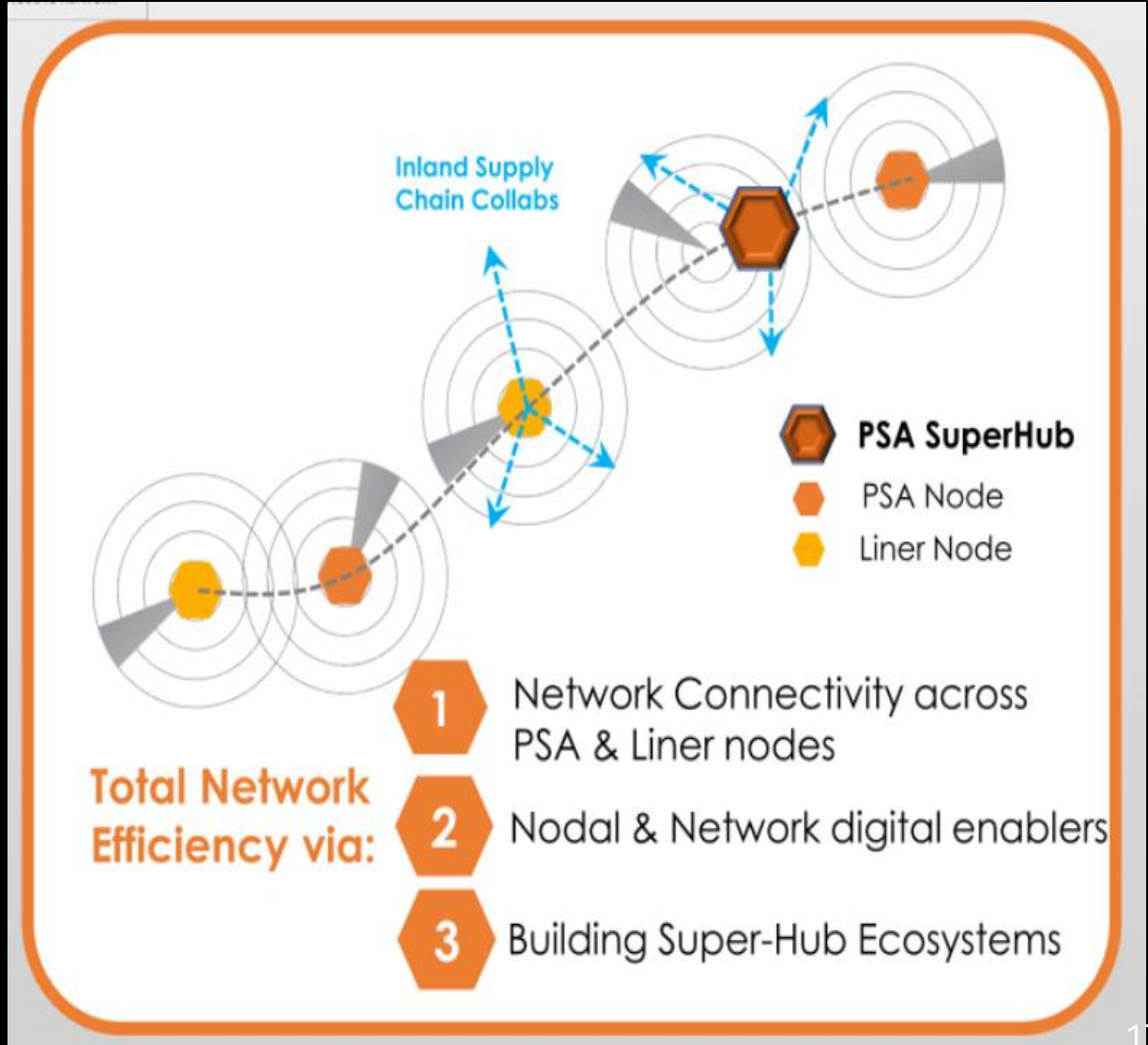
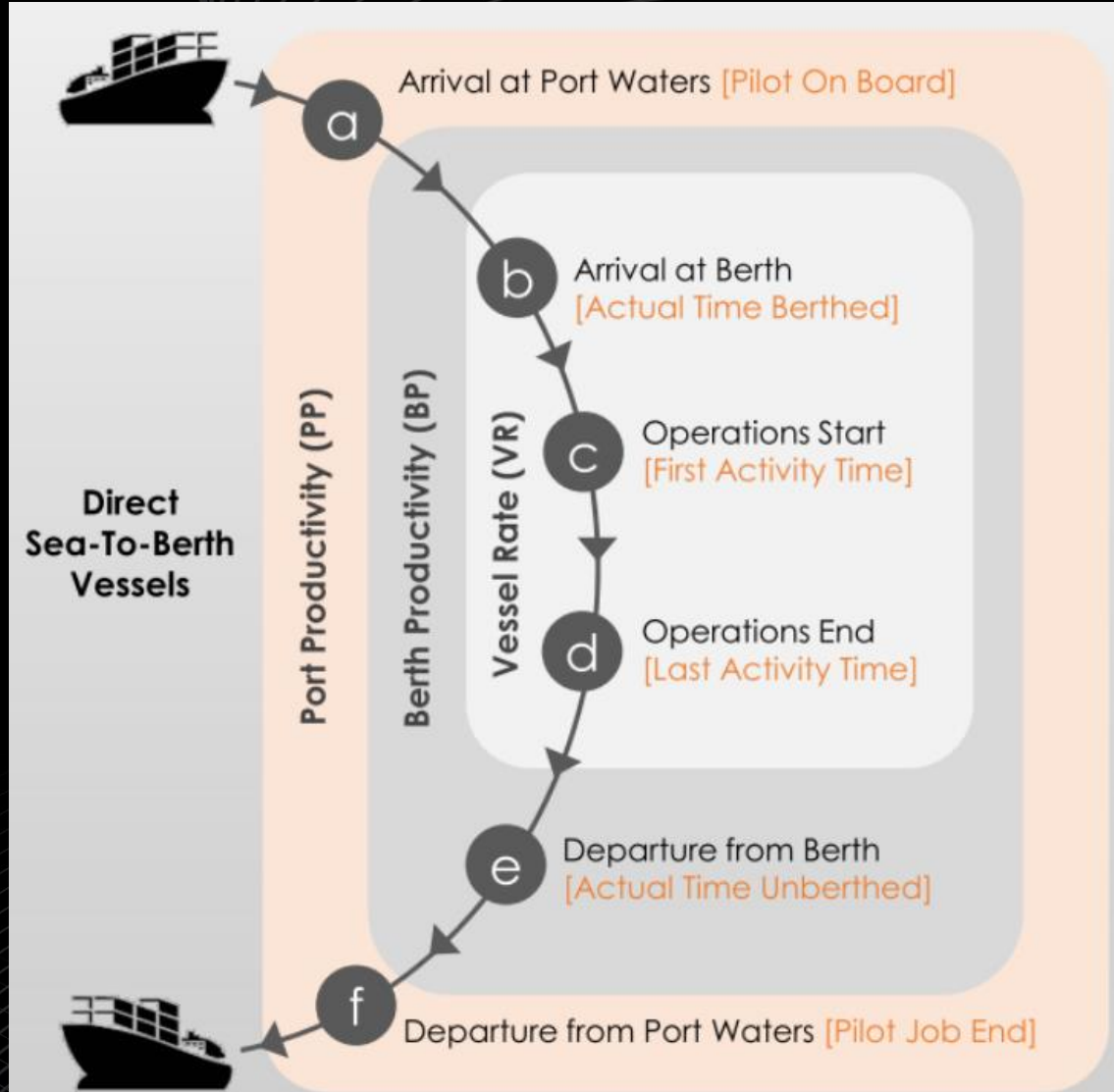
## Strategic

- Node - 2 - Network redesign
- Inland ports / ICD
- Ecosystem / Community



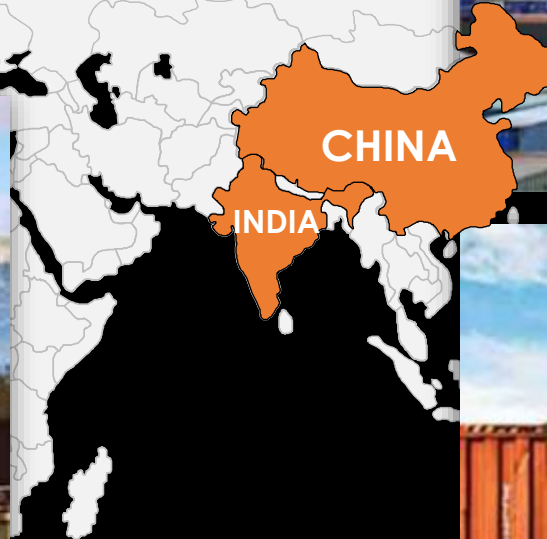
# Optimising capacity

## Node-2-Network optimisation



# Optimising capacity

Inland terminals = faster cargo evacuation !





# Closing thoughts...

- 1. Americas demand is expected to remain strong**
  - North and South America have strong, but differing dynamics
  - Transshipment incidence remains low – for how long ?
  - Regional trade has ample room to grow
- 2. New terminals:** Manage risk and long gestation periods
- 3. Expansion:** Grow capacity in established ecosystems
- 4. Optimisation:** Maximise speed and returns on capital