

The 6<sup>th</sup> International Maritime Transport and logistics Conference

# GLOBAL INTEGRATION IN PORTS

FUTURE OPPORTUNITIES



19-21 March 2017 Alexandria - Egypt



## Panama's Logistics Performance Index (LPI)

**H.E. Tomás Guardia**  
**Ambassador of Panama to Egypt**



## What is the Logistics Performance Index?

Based on a worldwide survey of global freight forwarders and express carriers, the Logistics Performance Index is a benchmarking tool developed by the World Bank that measures performance along the logistics supply chain within a country. Allowing for comparisons across 160 countries, the index can help countries identify challenges and opportunities and improve their logistics performance. The World Bank conducts the survey every two years.

Reliable logistics is indispensable to integrate global value chains—and reap the benefit of trade opportunities for growth and poverty reduction. The ability to connect to the global logistics web depends on a country's infrastructure, service markets, and trade processes. Government and the private sector in many developing countries should improve these areas—or face the large and growing costs of exclusion.



# PANAMA RANKS 40 IN THE LOGISTICS PERFORMANCE INDEX 2016 AMONG THE TOP PERFORMING UPPER MIDDLE INCOME ECONOMIES

**Table 1.4** Top-performing upper-middle-income economies

Economy	LPI 2016 rank	LPI 2016 score	LPI 2014 rank	LPI 2014 score
South Africa	20	3.78	34	3.43
China	27	3.66	28	3.53
Malaysia	32	3.43	25	3.59
Turkey	34	3.42	30	3.50
Panama	40	3.34	45	3.19
Thailand	45	3.26	35	3.43
Mexico	54	3.11	50	3.13
Brazil	55	3.09	65	2.94
Botswana	57	3.05	120	2.49
Romania	60	2.99	40	3.26

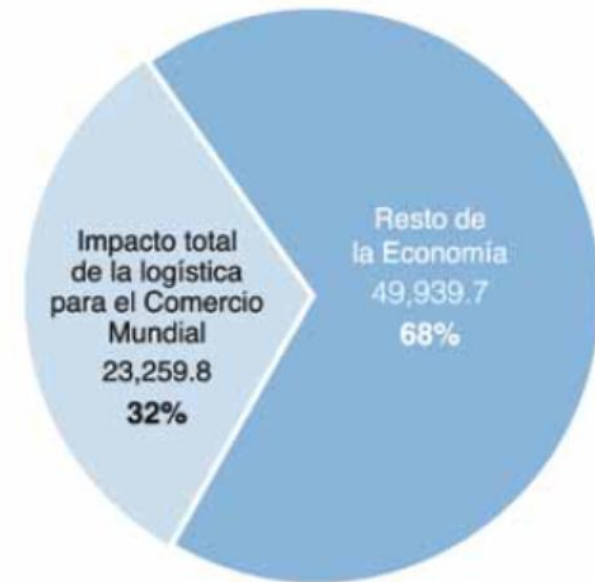
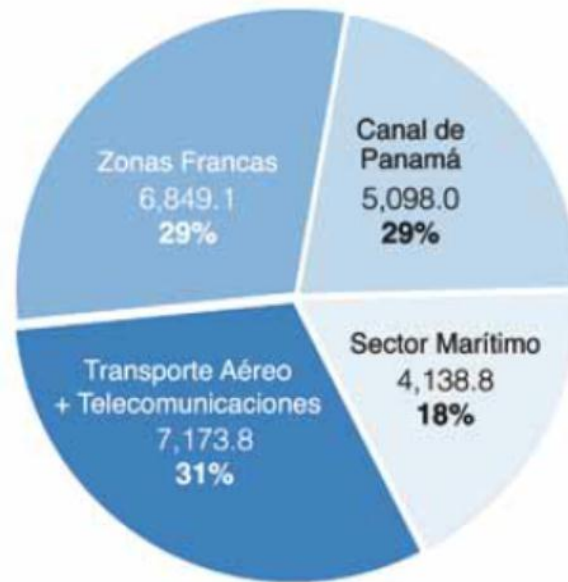
Source: Logistics Performance Index 2014 and 2016.





# PANAMA'S SERVICE ECONOMY DEPENDS 1/3 ON INTERNATIONAL TRADE LOGISTICS

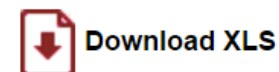
La importancia  
relativa de  
los sectores  
impulsores de la  
economía  
en su impacto  
total sobre la  
economía de  
Panamá





# PANAMA'S LOGISTICS PERFORMANCE INDEX 2007-2016

## DATA TABLE



(Toggle Rank and Score for Subindicators)

Country	Year	LPI Rank ▲	LPI Score	Customs ?	Infrastructure ?	International shipments ?	Logistics competence ?	Tracking & tracing ?	Timeliness ?
Panama	2016	40	3.34	3.13	3.28	3.65	3.18	2.95	3.74
Panama	2014	45	3.19	3.15	3.00	3.18	2.87	3.34	3.63
Panama	2010	51	3.02	2.76	2.63	2.87	2.83	3.26	3.76
Panama	2007	54	2.89	2.68	2.79	2.80	2.73	2.93	3.43
Panama	2012	61	2.93	2.56	2.94	2.76	2.84	3.01	3.47

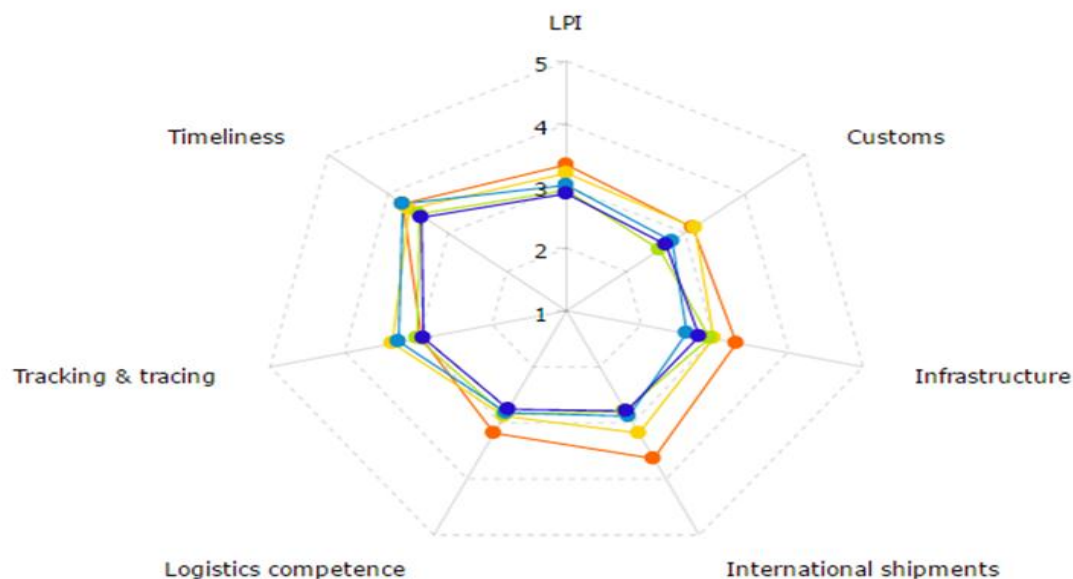


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**Radar** Column Line  
 chart by amcharts.com

**Panama 2016**



■ Panama 2016    
 ■ Panama 2014    
 ■ Panama 2012    
 ■ Panama 2010  
■ Panama 2007





# MAIN STRENGTHS OF PANAMA

- INFRASTRUCTURE DEVELOPMENT
  - PANAMA CANAL EXPANSION
  - SEAPORT FACILITIES
  - AIRPORT EXPANSION
- INTERNATIONAL SHIPMENTS
- LOGISTICS COMPETENCE



# PANAMA CANAL EXPANSION







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## OPENING CEREMONY OF PANAMA CANAL EXPANSION 26 AUGUST 2016

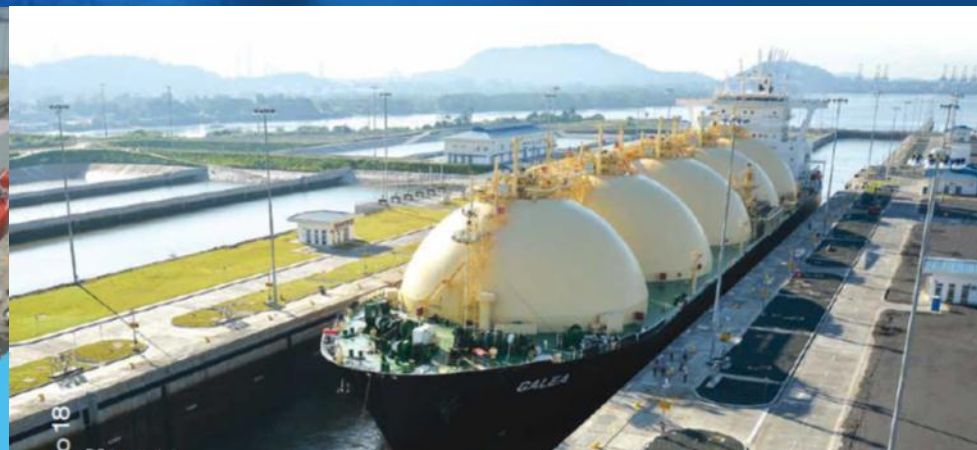


Las esclusas de Cocolí recibieron la bendición por parte de miembros del comité ecuménico.





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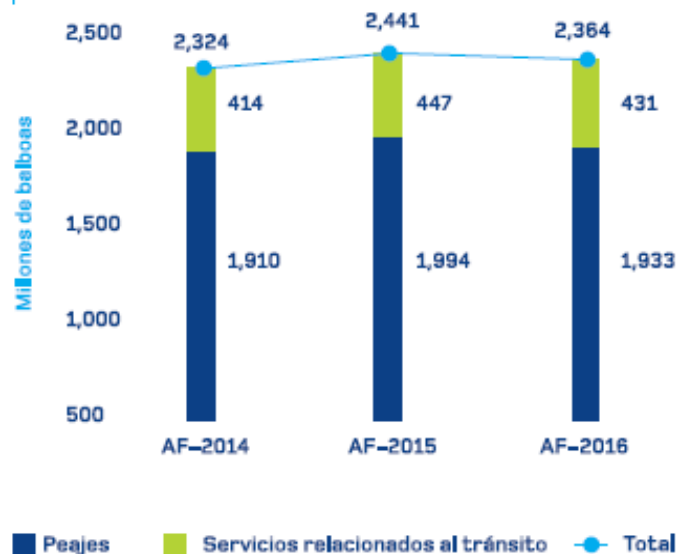
**MARCH 2017:  
1,000  
NEOPANAMAX  
TRANSITS**



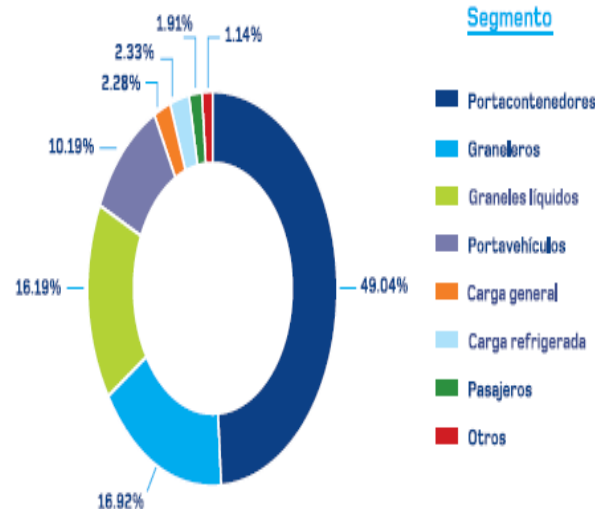


# CANAL FY2016 INCOME FROM TRANSITS

Ingresos de tránsito



Distribución de ingresos de peajes por segmento

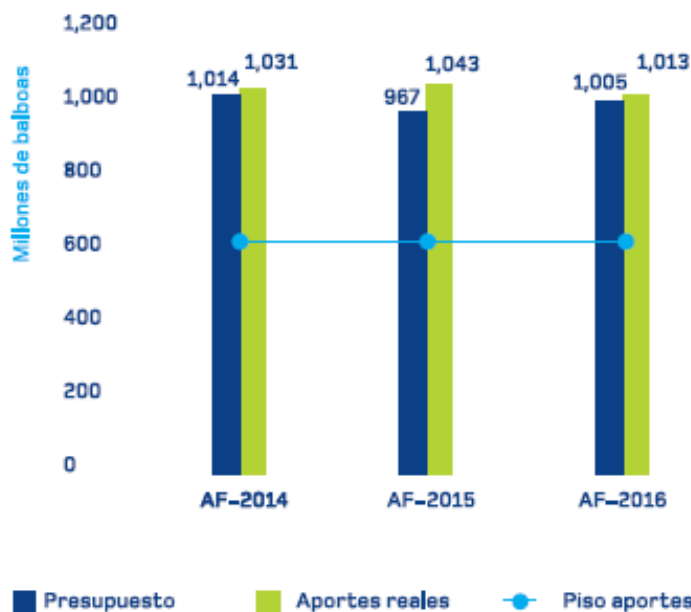


Segmento	Ingresos (millones E/.)	Variación vs AF-2015
Portacontenedores	948	0.2% ↑
Graneleros	327	-18.4% ↓
Graneles líquidos	313	7.1% ↑
Portavehículos	197	-2.1% ↓
Carga general	44	-7.0% ↓
Carga refrigerada	45	0.3% ↑
Pasajeros	37	0.4% ↑
Otros	22	-11.2% ↓
<b>Total</b>	<b>1,933</b>	



# CANAL FY 2016 DIRECT CONTRIBUTION TO NATIONAL TREASURY: US\$1.013 BILLION

Aportes directos al Tesoro Nacional  
Real vs presupuesto modificado  
Ley 28: piso aportes B/. 568 millones





# PANAMANIAN PORTS RANKING

Worldwide: Top 50

Latin America &  
Caribbean: Top 3

## Ranking de puertos

Los Top 20 en América Latina y el Caribe en 2015

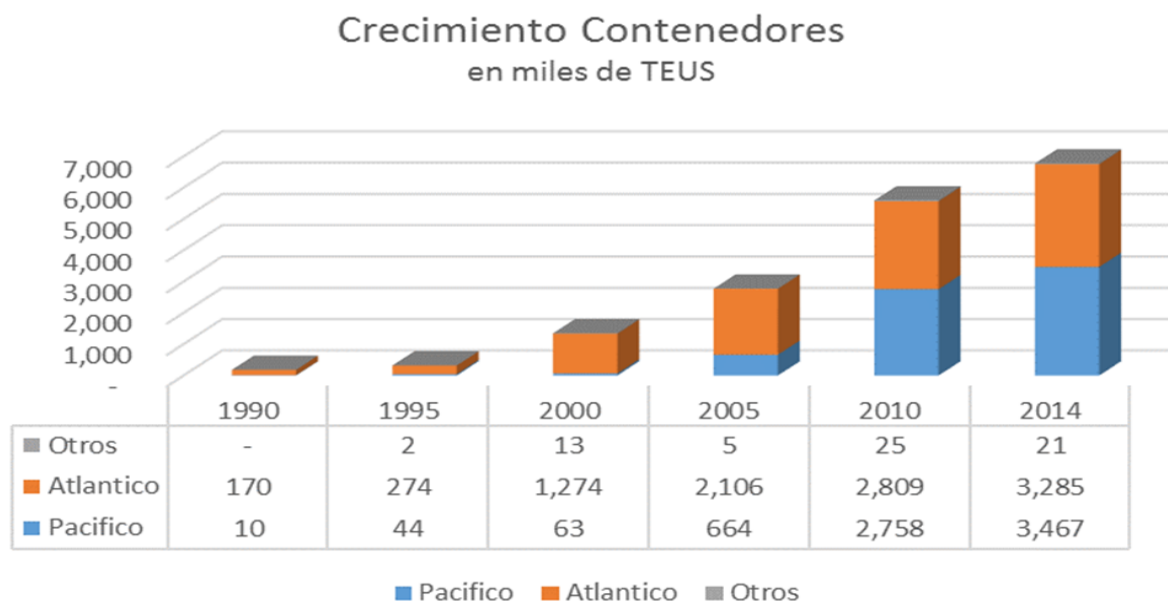
La CEPAL elabora cada año un ranking que muestra el detalle de los movimientos de carga en contenedores en 120 puertos de la región, en base a información recopilada directamente con las autoridades portuarias y operadores de los terminales marítimos. En 2015 esta actividad creció 1,7%, con un volumen aproximado total de 48 millones de TEU. Esta infografía muestra los puertos ubicados en los primeros 20 lugares del ranking.







## INCREASE ACTIVITIES OF PANAMANIAN PORTS IN CONTAINERIZED CARGO



1990: 2 PORTS

180,000 TEUs

2015: 5 PORTS

6,893,886 TEUs

2016: 5 PORTS

6,266,502 TEUs(p)



## MASTER PLAN FOR NEW LOGISTICS PARKS AND PORT TERMINALS:

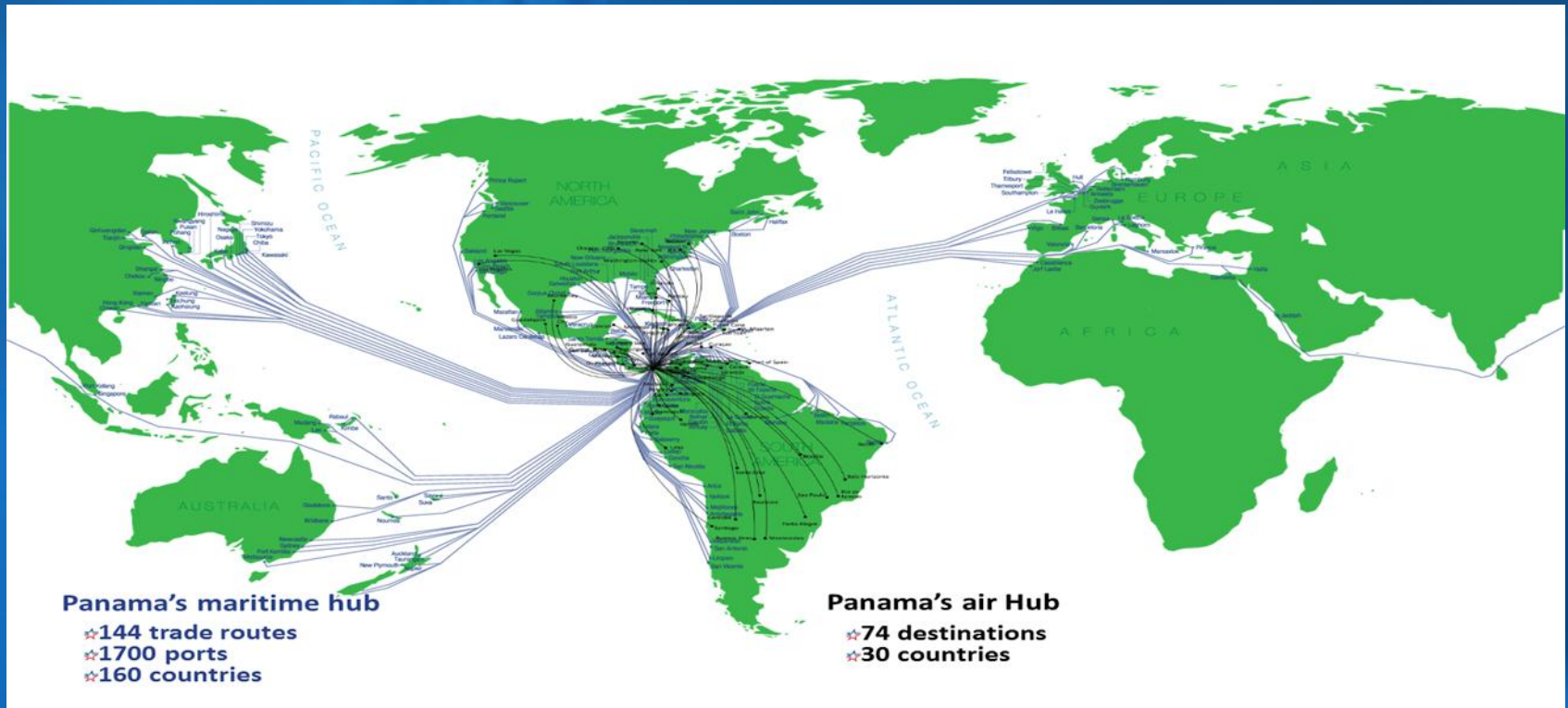
- Corozal Port (Pacific)
- RoRo Terminal
- LNG Terminal
- Pacific & Atlantic logistics parks.







# THE CHALLENGE: Panama as a MEGA HUB OF THE AMERICAS







# Steps taken by government to improve logistics sector

- Creation of the National Logistics Cabinet (Executive level – Ministerial) – 2012
- Creation of National Council of Logistics (Public – Private) – 2013.
- Establishment of Georgia Tech Panama Logistics Innovation and Research Center.
- Government's National Economic Plan of new Administration (2014-2019) highlights Logistics as one of the 4 priority pillars of the national economy development. Establishes investment priorities in logistics sector (infrastructure and training).
- Establishment of the Competitiveness and Logistics Secretariat at the Presidential Office (2015).
- Preparation of National Plan of Logistics (2016-17).



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**MANY THANKS!**

**Q&A**

Embajada de Panamá en Egipto -



سفارة بنما بمصر