Billionaire losses

- Market Volatility
- Supply and Demand Imbalance
- Overcapacity
- Prices / Rates War
- High Costs (fuel & crew)
- Asset Management Focus
- Bottom Line Careless
- Cash Flow Stress
- Strained Cash Positions
- Companies Bankruptcy and Collapse
RECOVER PROFITABILITY: STRATEGY

- REFINANCING.
- SLOW STEAMING.
- MAJOR ALLIANCES → HIGH CONCENTRATION.
- BIGGER SHIPS / SCALE ECONOMIES.
- ROUTES AND PORTS RE PLANNING / CANCELLING.
- AGGRESSIVE COMPETITION.
- EFFICIENCY – THROUGHOUT ENTIRE SERVICE CHAIN.
PORTS, TERMINALS, LOGISTICS.

Evolution of container ships

TEU: twenty-foot equivalent units, length x width x depth below water in metres

- Early container ship (1956-)
  500 – 600 TEU, 137x17x9m
- Fully Cellular (1970-)
  1,000 – 2,500 TEU, 215x20x10m
- Panamax (1980-)
  3,000 – 3,400 TEU, 250x32x12.5m
- Panamax Max (1985-)
  3,400 – 4,500 TEU, 280x32x12.5m
- Post Panamax (1988-)
  4,000 – 5,000 TEU, 285x40x13m
- Post Panamax Plus (2000-)
  6,000 – 8,000 TEU, 300x43x14.5m
- New Panamax (2014-)
  12,500 TEU, 366x49x15.2m
- Triple E (2013-)
  18,000 TEU, 400x59x15.5m

Adapted with permission from The Geography of Transport Systems, Jean-Paul Rodrigue

- Bigger Ships
- Re Routing
- Aggressive Competition
- Efficiency

Facilities / Infrastructure Equipment / Process
Idle capacity risk
Hard Procurement / Negotiations / Contracts
Heavy Investments Service Chain Integration (Vertical & Horizontal) Optimization / Innovation
NATIONAL DEVELOPMENT PLAN 2013-2018
GOVERNMENT OF MEXICO

OBJECTIVE
TO ACHIEVE MAXIMUM POTENTIAL OF MÉXICO

5 GOALS
1. MÉXICO IN PEACE
2. INCLUSIVE MÉXICO
3. QUALITY IN EDUCATION
4. PROSPEROUS MÉXICO
5. GLOBAL RESPONSIBILITY

STRATEGIES
i) PRODUCTIVITY - COMPETITIVENESS
ii) REACHABLE & MODERN GOVERNMENT
iii) GENDER EQUITY PERSPECTIVE
NATIONAL PLANNING

MEXICO COMPETITIVENESS

MULTIMODAL CONNECTION CORRIDORS

2013 – 2018

US$ 300 Bn Infrastructure

US$ 100 Bn TRANSPORT & COMMUNICATIONS
NATIONAL PLAN FOR LOGISTIC PLATFORMS
SUPER HIGHWAY MAZATLÁN - MATAMOROS • US$ 2.4 BN

THE “CORREDOR ECONÓMICO DEL NORTE” WILL DRAMATICALLY REDUCE THE TRANSIT TIME MAZATLÁN  SOUTHERN TEXAS.
<table>
<thead>
<tr>
<th>Feature</th>
<th>Measurement</th>
</tr>
</thead>
<tbody>
<tr>
<td>Berth Line</td>
<td>1,300 m</td>
</tr>
<tr>
<td>Water Depth</td>
<td>15.0 m</td>
</tr>
<tr>
<td>Turning Basin</td>
<td>400 m</td>
</tr>
<tr>
<td>Container Yard</td>
<td>100,000 m²</td>
</tr>
<tr>
<td>Warehouses</td>
<td>100,000 m³</td>
</tr>
<tr>
<td>Cold Storage</td>
<td>4,000 m²</td>
</tr>
<tr>
<td>Reefer Station</td>
<td>150 Plugs</td>
</tr>
<tr>
<td>Bulk Yard</td>
<td>20,000 m²</td>
</tr>
</tbody>
</table>
MAZATLÁN: GATEWAY TO THE PACIFIC OCEAN
PACIFIC BASIN
- 40 COUNTRIES
- ACCESS TO 50% PLANET TERRITORY
- 40% WORLD POPULATION
- 47% WORLD GDP
- 37% EXPORTS
- 7% - 8% per year growth

CUENCA DEL PACÍFICO
- 40 PAÍSES
- ACCESO 50% SUPERFICIE TERRESTRE
- 40% POBLACIÓN MUNDIAL
- 47% PIB MUNDIAL
- 37% EXPORTACIONES
- CRECIMIENTO 7% - 8% aa

MÉXICO
- TLC 40 PAÍSES
- PBEC/PEEC (1989)
- APEC (1993)
- NAFTA (1994)
- ALIANZA DEL PACÍFICO (2011)
- TTP (Octubre 2012)
TEAM WORK

MAZATLÁN
un Puerto en Acción

Terminal Marítima Mazatlán

Unidos a la carga

Maquinaria y equipo
Depósitos vacíos
Mantenimiento y reparaciones

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TMAZ & MAZATLAN PORT