



Brazilian Ports: Institutional overview and Investment opportunities

Presentation for the World Economic Forum on Latin
America
Panama City – April 2014

MINISTRY OF PORTS
SECRETARIA DE PORTOS DA PRESIDÊNCIA DA REPÚBLICA
SEP/PR



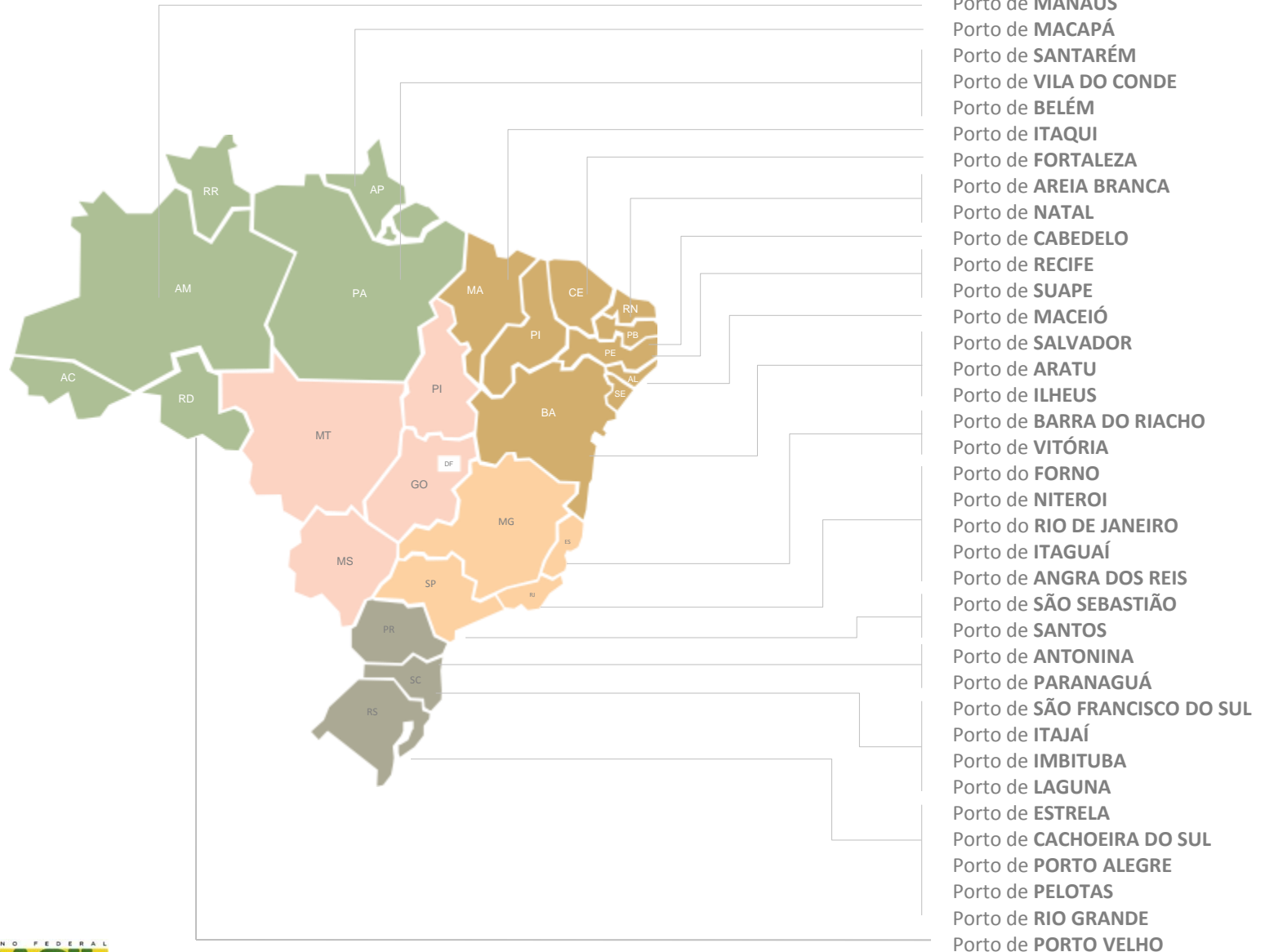
Legal references:

- Federal Law n. 12.815, 2013; and
- Federal Decree n. 8.033, 2013.

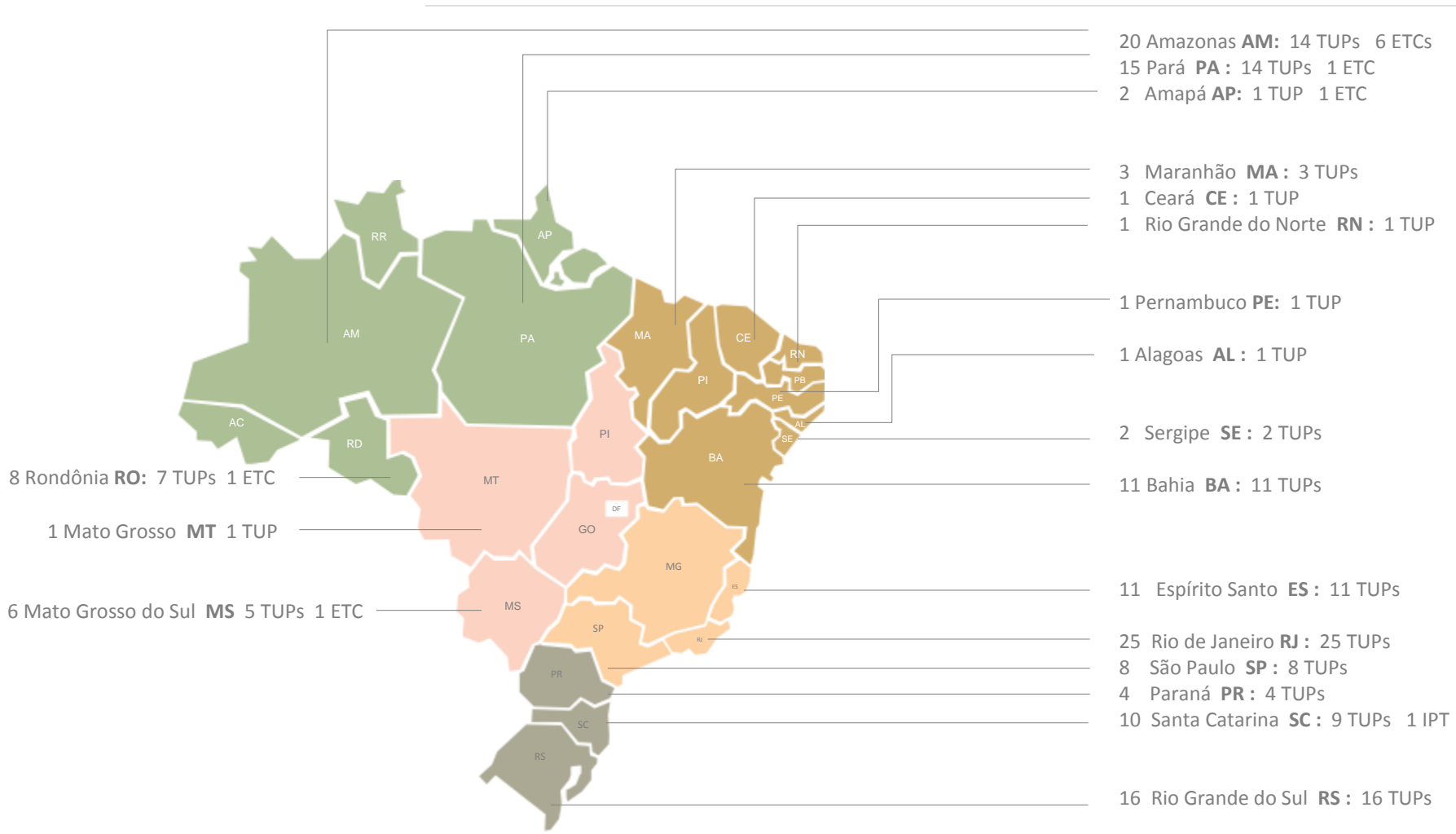
Main changes:

- Centralized Intermodal Logistic Planning;
- Reallocation of responsibilities and competences among public players (Ministry of Ports, Federal Agency and Port Authorities);
- Main goals: logistic cost reduction and efficiency; and
- Competition enhancement

Brazilian Public Ports: 37 Ports



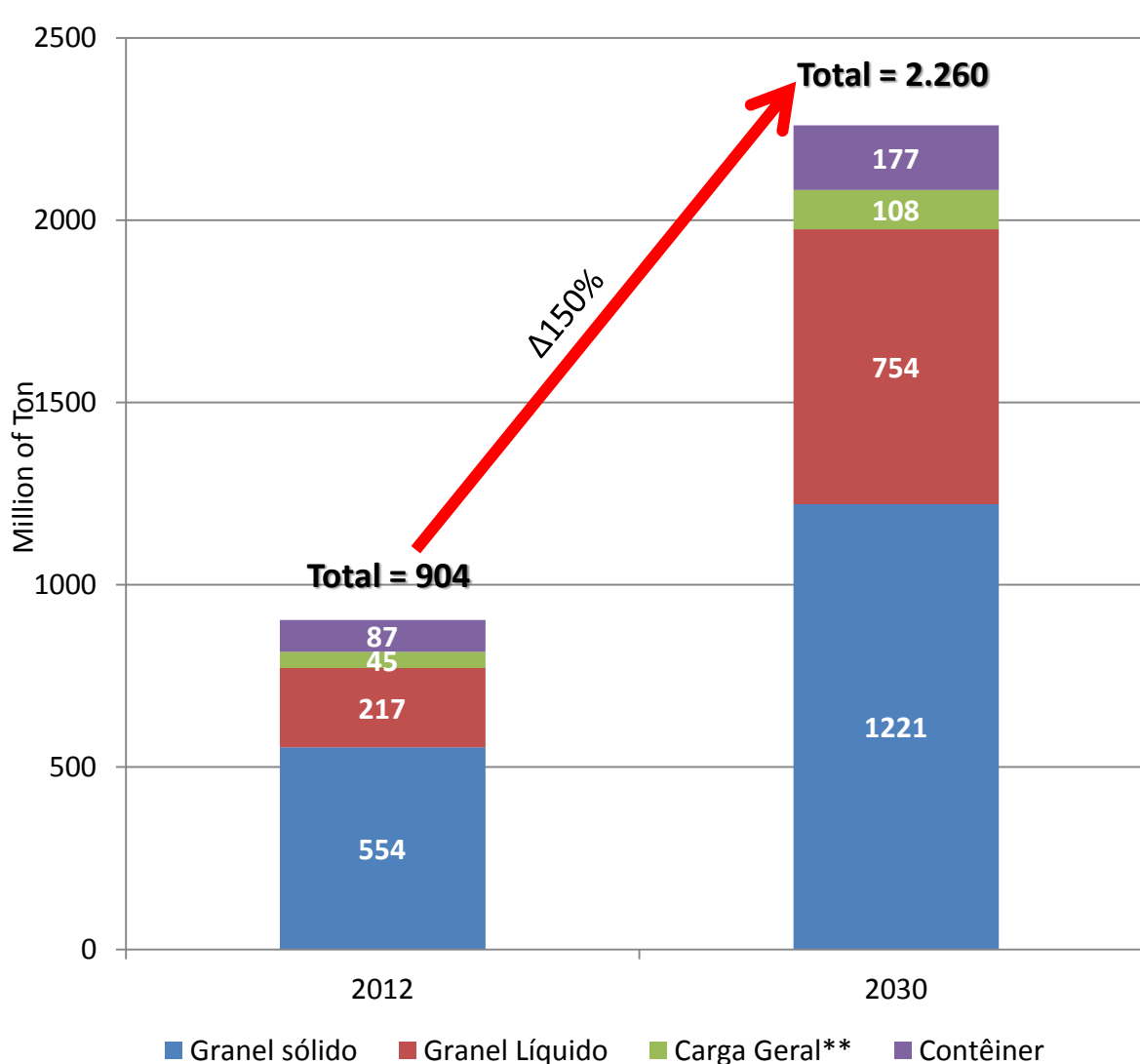
Brazilian Private Terminals: 146 Terminals



TUP – Terminal de Uso Privado
ETC – Estação de Transbordo de Carga
IPT – Instalação Portuária de Turismo

Posição de: 21/02/2014

Demand forecast 2030 (by cargo)



Demand Average Annual Growth Rate (2010-2030)

BY CARGO	
Solid Bulk	5.68% per year
Liquid Bulk	6.81% per year
General Cargo**	3.37% per year
Container	6.33% per year
Total	5.70% per year

**Excluding container

➤ NEW CONCESSIONS

- 159 areas organized in 4 Groups (U\$ 7,2 billion investment)
 - Port Efficiency
 - Goal: to reduce logistic costs in Brazil

➤ PRIVATE TERMINALS

- Simplified granting proceeding
- No limitation to third party cargo handling
- Trade off: higher investments – lower regulation

➤ EARLY RENEWAL OF ONGOING CONCESSION CONTRACTS

- Additional investment on public ports of U\$ 4 billion
- Improvements on efficiency and capacity

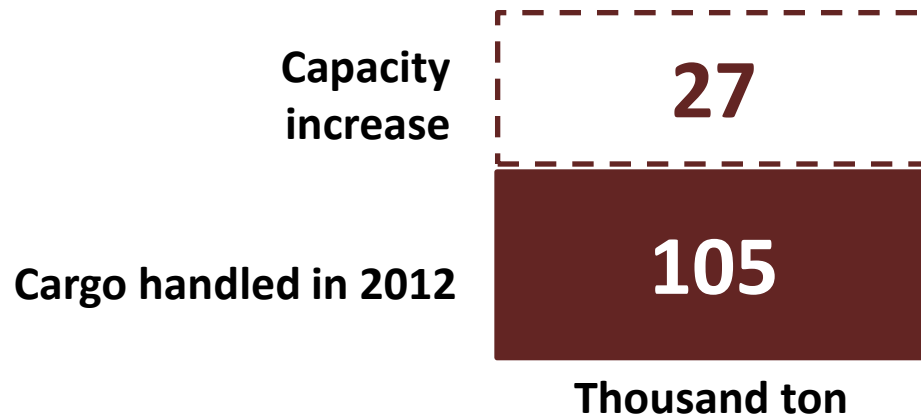
Public Port Concession Plan: 4 Groups

1st Group	2nd Group	3rd Group	4th Group
Santos/SP Vila do Conde/PA Santarém/PA Belém/PA Miramar/PA Outeiro/PA	São Sebastião/SP Salvador/BA Aratu/BA Paranaguá/PR	Maceió/AL Suape/PE Recife/PE Cabedelo/PB Fortaleza/CE Itaqui/MA Santana/AP	Rio Grande/RS Porto Alegre/RS Imbituba/SC Itajaí/SC São Francisco do Sul/SC Rio de Janeiro/RJ Niterói/RJ Itaguaí/RJ Vitória/ES Manaus/AM



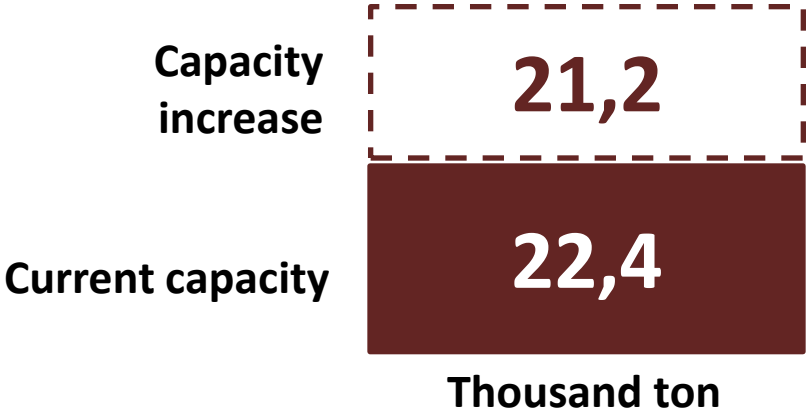
Investment: U\$ 3,9 billion

Investment: R\$ 1,7 bi
20 areas reorganized into 9 terminals



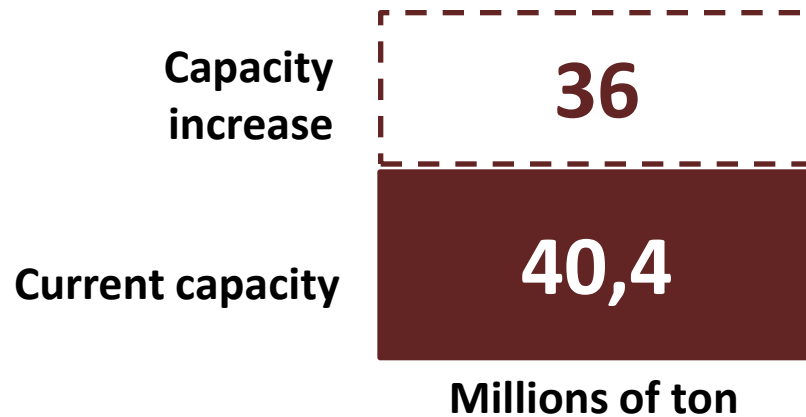
Port of Santos

Investment: R\$ 3,7 bi
20 areas for concession



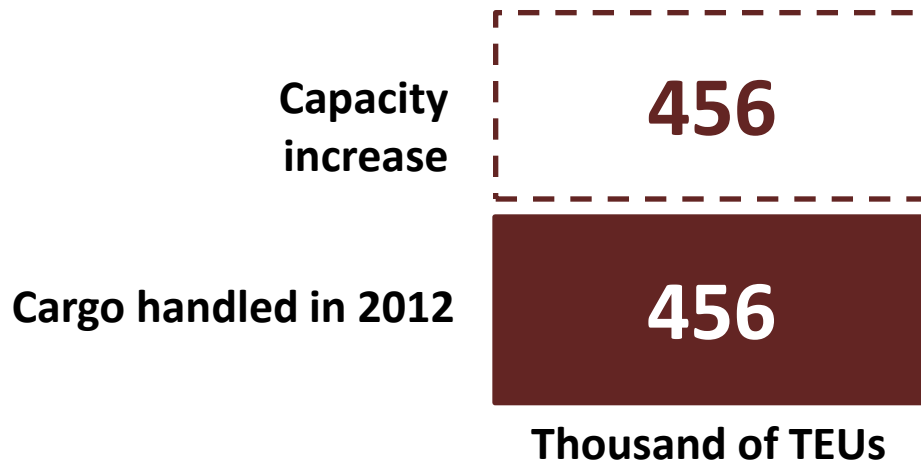
Ports of Pará

Investment: R\$ 2,6 bi
17 areas reorganized into 10 terminals
6 new docks



Port of Paranaguá

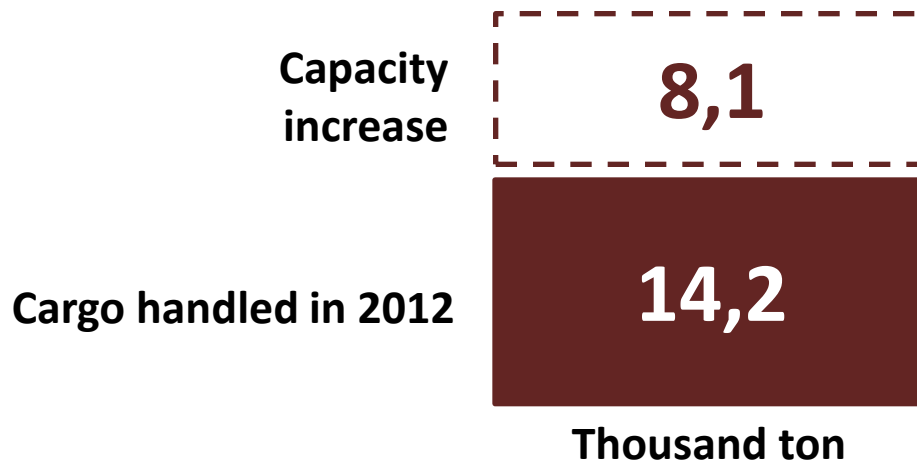
Investment: R\$ 662 thousand
New container terminal and a new dock



Port of Salvador

Investment: R\$ 659 mi

4 areas reorganized into 2 terminals and the construction of a new terminal.



Port of Aratu

PRIVATE TERMINALS

- End of cargo ownership limitations: terminal is allowed to handle third parties and proprietary cargo without limitation
- New authorizations shall be granted only regarding areas outside public ports region
- Expedite Granting proceeding

BETTER ENVIROMENT FOR PRIVATE INVESTMENTS

Authorizations (Private Terminals)

id	Empresa (Razão Social)	Município	UF	Modalidade	Valor de Investimento	Data da Assinatura
1	Estaleiro Brasa	Niterói	RJ	Estaleiro	R\$ 60.000.000,00	11/12/2013
2	Flexibras - TUP Technimp	São João da Barra	RJ	TUP - Apoio Off Shore	R\$ 142.450.000,00	11/12/2013
3	Saipem do Brasil	Guarujá	SP	TUP - Apoio Off Shore	R\$17.000.000,00	11/12/2013
4	Fundação Municipal Perto Belo	Porto Belo	SC	IPT	R\$ 1.750.000,00	11/12/2013
5	AMAGGI Exp e Imp Ltda	Porto Velho	RO	TUP	R\$ 100.000.000,00	03/01/2014
6	BAMIN - Bahia Mineração	Ilhéus	BA	TUP	R\$ 898.000.000,00	06/01/2014
7	Porto Sul	Ilhéus	BA	TUP	R\$ 2.421.980.000,00	06/01/2014
8	Estaleiro Jurong (Aracruz)	Aracruz	ES	TUP - Estaleiro	R\$ 500.000.000,00	20/01/2014
9	ETC - RONAV	Manaus	AM	ETC	R\$ 3.000.000,00	07/02/2014
10	Transporte Bertolini	Juruti	PA	ETC	R\$ 1.157.000,00	12/02/2014
11	Transporte Bertolini	Manaus	AM	ETC	R\$ 180.000,00	12/02/2014
12	Transporte Bertolini	Porto Velho	RO	ETC	R\$ 3.332.000,00	12/02/2014
13	Intermoor do Brasil Serviços Offshore de Instalação Ltda.	São João da Barra	RJ	TUP	R\$ 73.600.000,00	13/02/2014
14	Manabi Logística S.A.	Linhares	ES	TUP	R\$ 1.500.000.000,00	27/02/2014
15	Mineração Buritirama S.A.	Barcarena	PA	TUP	R\$ 52.350.000,00	18/03/2014
16	Louis Dreyfus Commodities Brasil S.A.	São Simão	GO	ETC	R\$ 12.196.671,00	27/03/2014
17	RIO TURIA SERVIÇOS LOGÍSTICOS LTDA- TERFRON	Itaituba	PA	TUP	R\$ 50.505.000,00	27/03/2014
	Total Parcial				R\$ 5.837.500.671,00	
18	Ultrafértil*	Santos	SP	TUP (expansão)*	R\$ 2.257.000.000,00	03/12/2013
	Total Geral				R\$ 8.094.500.671,00	
	* Expansão de TUP existente; não participou do anúncio de 2013.					

17 new authorizations granted = U\$ 2,45 billion

41 terminals currently under analysis = U\$ 2,56 billion



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