

CONNECTIVITY INVESTMENT CONFERENCE

GREEN AND EFFICIENT PORTS

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Comprehensive Diagnosis of Short Sea Shipping Logistics on the West Coast of Latin America

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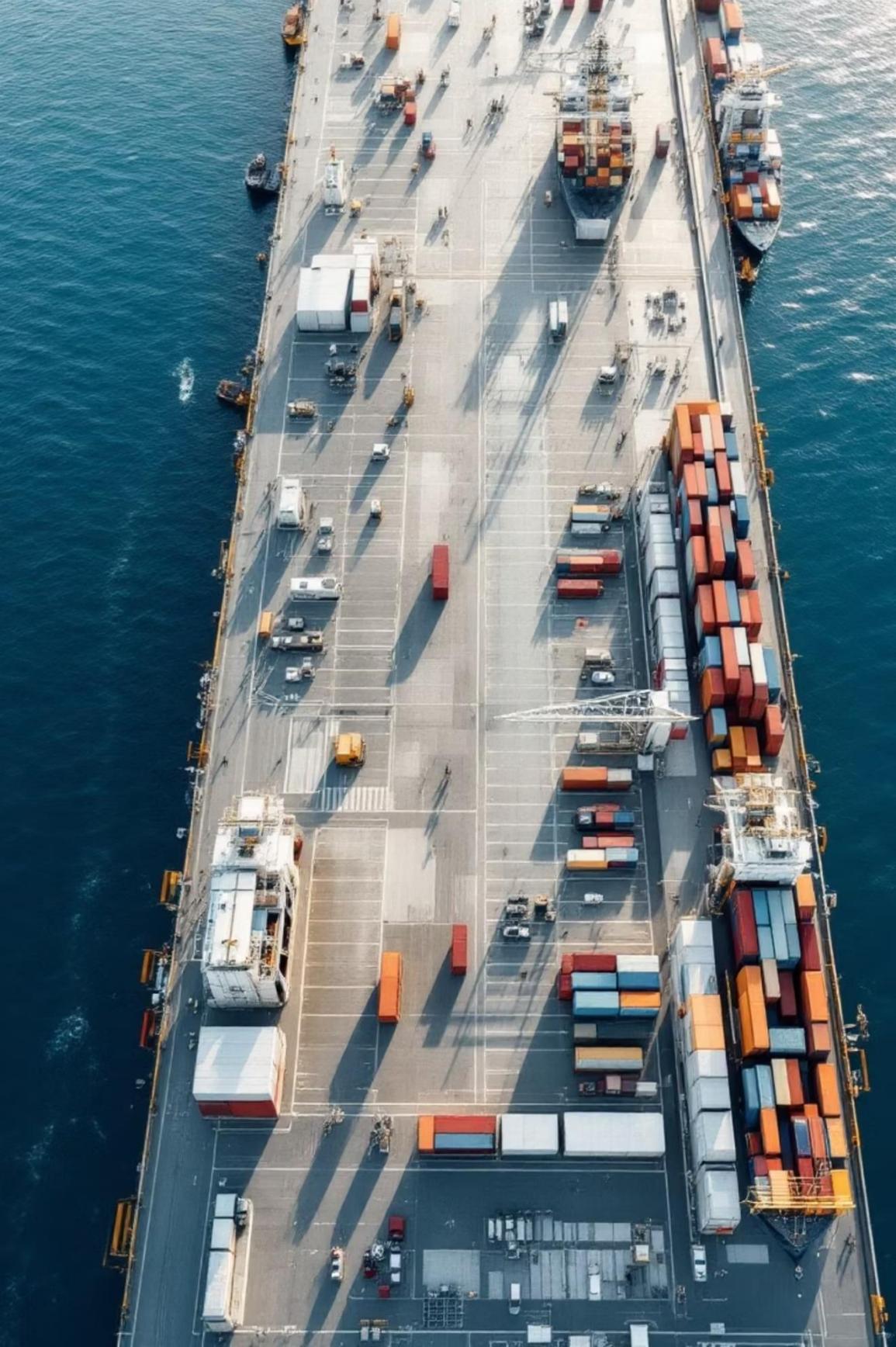
Why is **CAF** interested in **SSS** services?

Leverage sustainable development through growth of intraregional trade (15%)

- **Efficiency** in long-distance transport (cost) enabling value chains in regional corridors
- **Environmental balance and decarbonization of transport**
- Expansion of connectivity and cargo mobility **with less infrastructure investment**

TMCD Concept

- **SSS** services dedicated to short-distance maritime links between territories of a regional economic corridor
- **Feeder** services for intercontinental maritime services
- **Cabotage** services at the national level



Study to strengthen intraregional trade and short-distance maritime logistics and propose the foundations for a comprehensive public policy on the west coast of South America (2024)



Short Sea Shipping

Promote regional value chains by facilitating the transport of goods between **Chile, Perú y Bolivia.**



Regulatory Modifications

Identify necessary changes in **public policies and mechanisms** to promote collaboration among Port Communities



International Experience

Consider global **lessons learned** to apply on the West Coast of South America



Main challenges: **embryonic sector**

A. Trade exchanges between the three countries are very weak

| FLUJO | TEU | TEU Potenciales |
|-----------------|---------------|-----------------|
| Bolivia - Chile | 845 | 479 |
| Bolivia - Perú | 801 | 529 |
| Chile - Bolivia | 5.150 | 2.176 |
| Chile - Perú | 22.966 | 9.881 |
| Perú - Bolivia | 5.699 | 3.824 |
| Perú - Chile | 15.871 | 9.274 |
| Totales | 51.332 | 26.163 |

A. Regional maritime service offering

1. SSS* does not exist
2. Feeder services: low availability or insufficient regular maritime services adapted to intraregional trade demand

B. Current regulations regarding TMCD and SSS are nonexistent or very disparate

C. No collaboration spaces between shippers, shipping companies, and public authorities

D. Access and exchange of information: scattered and difficult to access

E. Human talent: lack of professionals and training offerings

Internacional Experience

Lessons for the West Coast of Latin America



- A. Address shortcomings or deficiencies observed in **trade** between countries
- B. Promote the attraction of new **cargo**
- C. Develop SSS services** among the involved countries
- D. Develop new **infrastructure** and improve existing ones
- E. Reduce costs and transit times**
- F. Harmonize the regulatory framework**
- G. Technical/professional **education**
- H. Strengthen international **collaboration** in electronic data exchange



Progress and Challenges

Regional Cooperation

- Share experiences and best practices to develop an efficient and competitive TMCD system

Strategic Routes

- Focus efforts on **high commercial potential routes**, leveraging 7,000 km of coastline
- Expand the scale and complete the study, including Colombia and Ecuador

Regulatory Improvements

- Technical assistance for the improvement and **harmonization of regulatory frameworks** (Chile and Peru)
- Strategic support for the promotion of **SSS regulatory reform** in Chile

Promotion and Collaboration

- Technical assistance to accelerate the implementation of solutions for **electronic information exchange between ports, shipping companies, and the business community**
- Deployment of **public-private spaces** for the identification and agreement of inter-country initiatives

Capacity Development

- **Institutional strengthening**
- **Technical-professional education**: create joint programs to train specialists in logistics and port management



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