



# 4<sup>th</sup> Neltume Ports Alignment Meeting



## Welcome & Introduction

Richard von Appen





# War Effects

War sets back global recovery

Energy crisis in Europe (Gas supply)



Increasing oil prices



Increasing commodity prices (Grain)



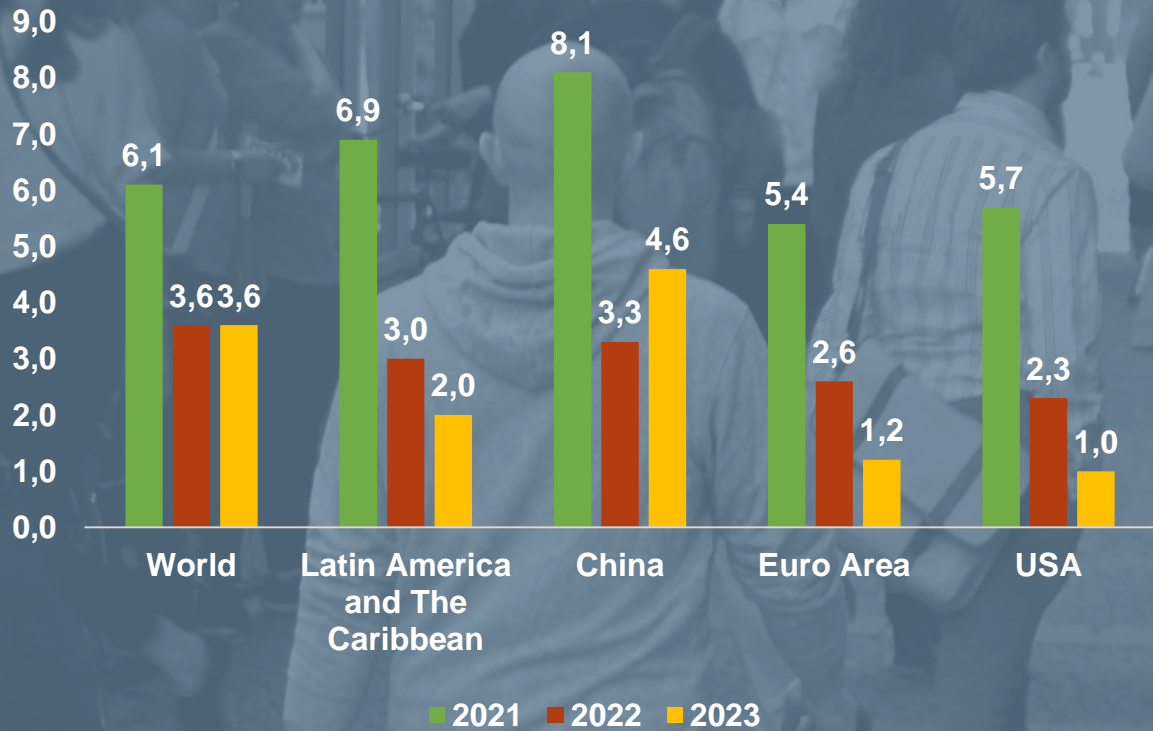
Political Instability



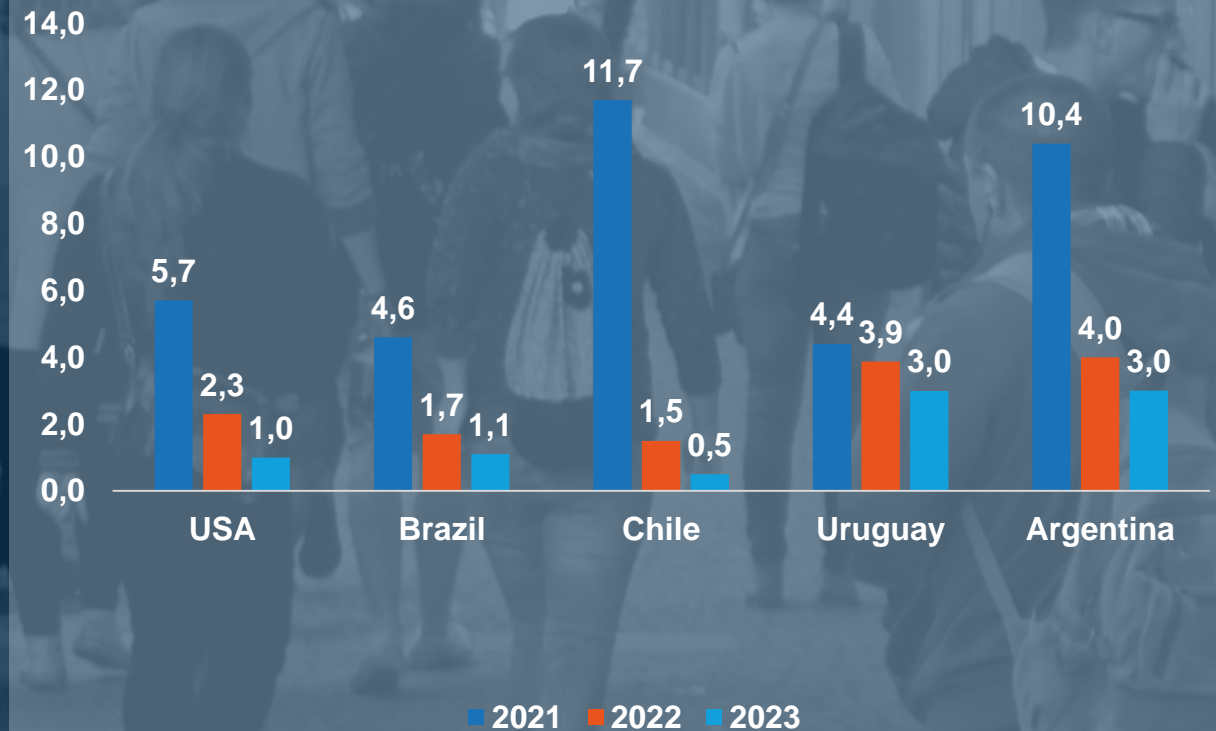
Economic damage from the war will contribute to a significant slowdown in global growth in 2022 and add to inflation. Fuel and food prices have increased rapidly, hitting vulnerable populations in low-income countries hardest.

# Global Economic Situation

## Global GDP Growth Projections



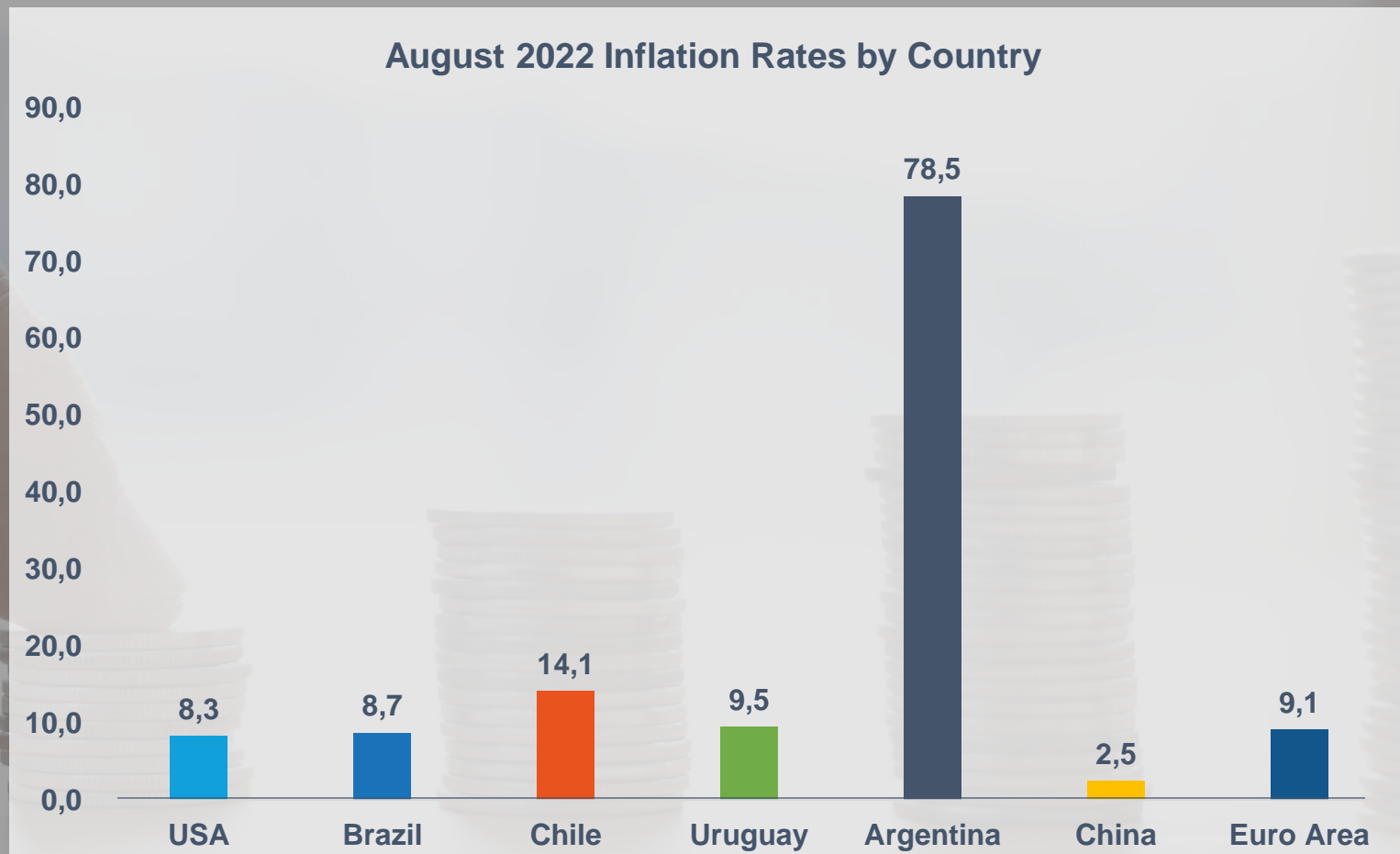
## Neltume Ports Countries GDP Growth Projections



Source: IMF, World Economic Outlook, July 2022



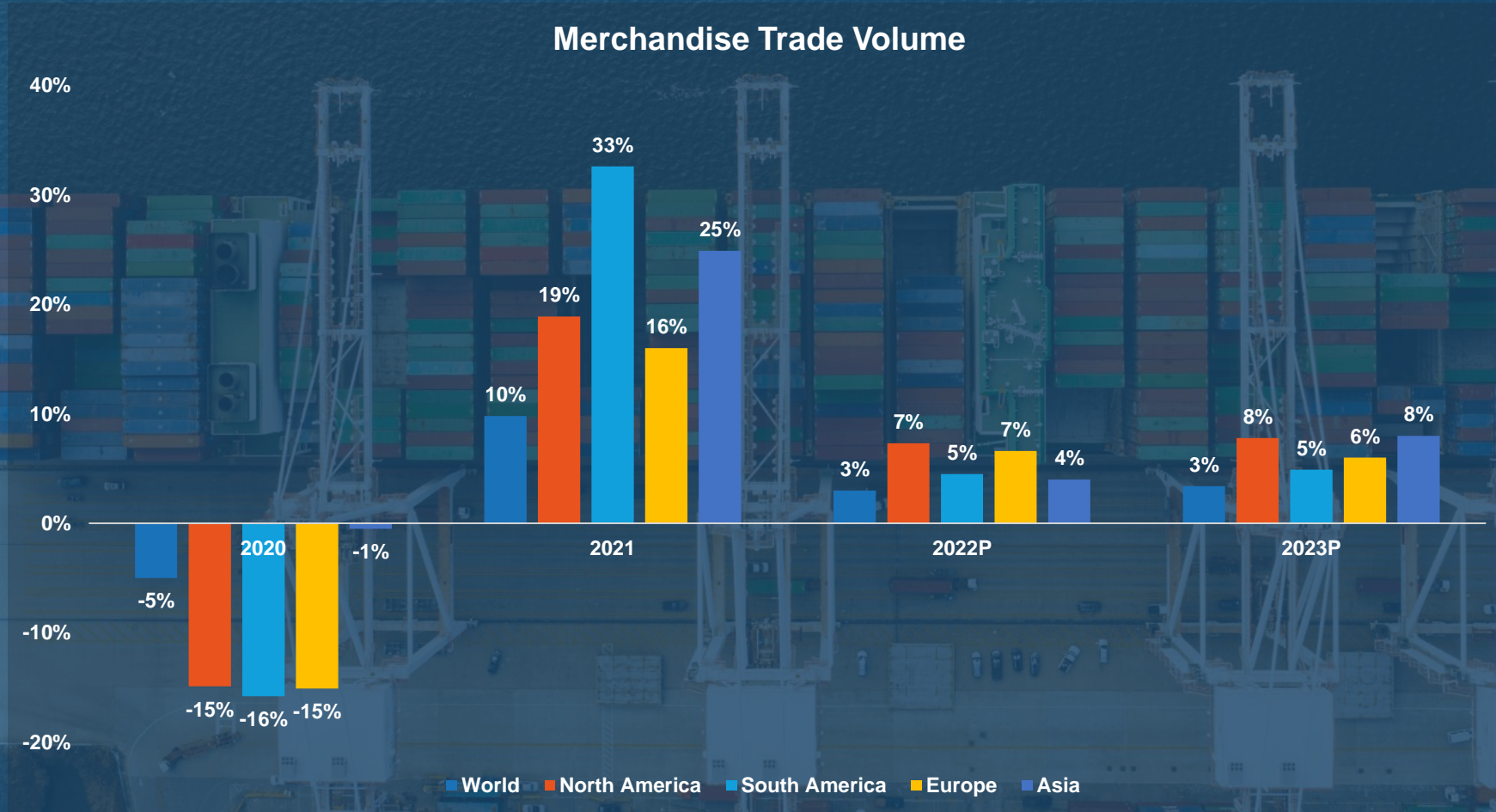
# Inflation



Source: Trading Economics, August 2022

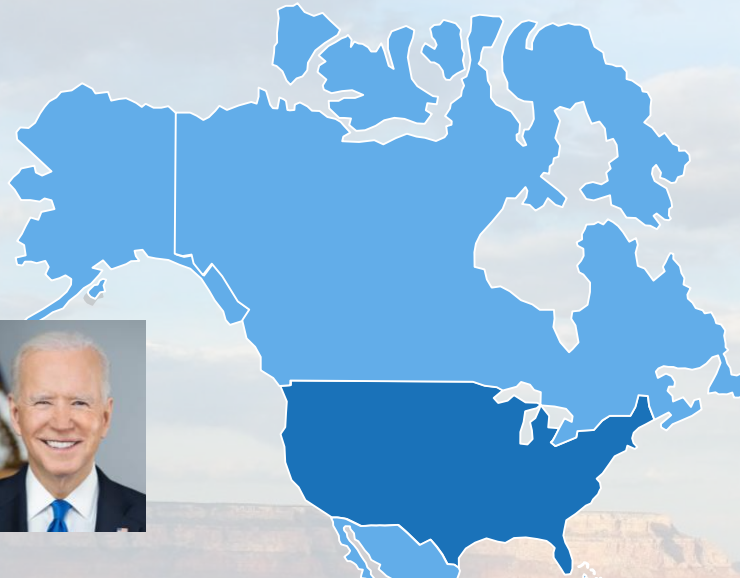
# Global Trade

2021 saw a sharp rebound in trade volumes after the pandemic-induced slump of 2020, but growth might have been stronger without recurring waves of COVID-19 during 2022.



Source: WTO, April 2022

# Political Events in the Americas



## USA

Joe Biden's job approval rating has fallen below 40% for the first time and now sits at a personal low of 38%.



## PANAMÁ

Social conflicts do to distrust of institutions and social problems.



## COLOMBIA

Gustavo Petro assumed on August 7<sup>th</sup> . There are protests against the reforms he presented.



## ECUADOR

Social conflicts mainly against high fuel prices.



## BRAZIL

Presidential Elections on October 2<sup>nd</sup> . Jair Bolsonaro and Lula da Silva.



## PERU

Pedro Castillo completes one year in charge of Peru with 5 corruption investigations. There is uncertainty as to whether he will continue in office.



## CHILE

Proposed Constitution was rejected. A new Constitutional process shall be proposed.

# Neltume Ports Nowadays

5 American COUNTRIES

23 BUSINESS UNITS (SUBSIDIARIES AND ASSOCIATES)

THROUGHPUT 2021:

46,4 MILLION TONS MOVED

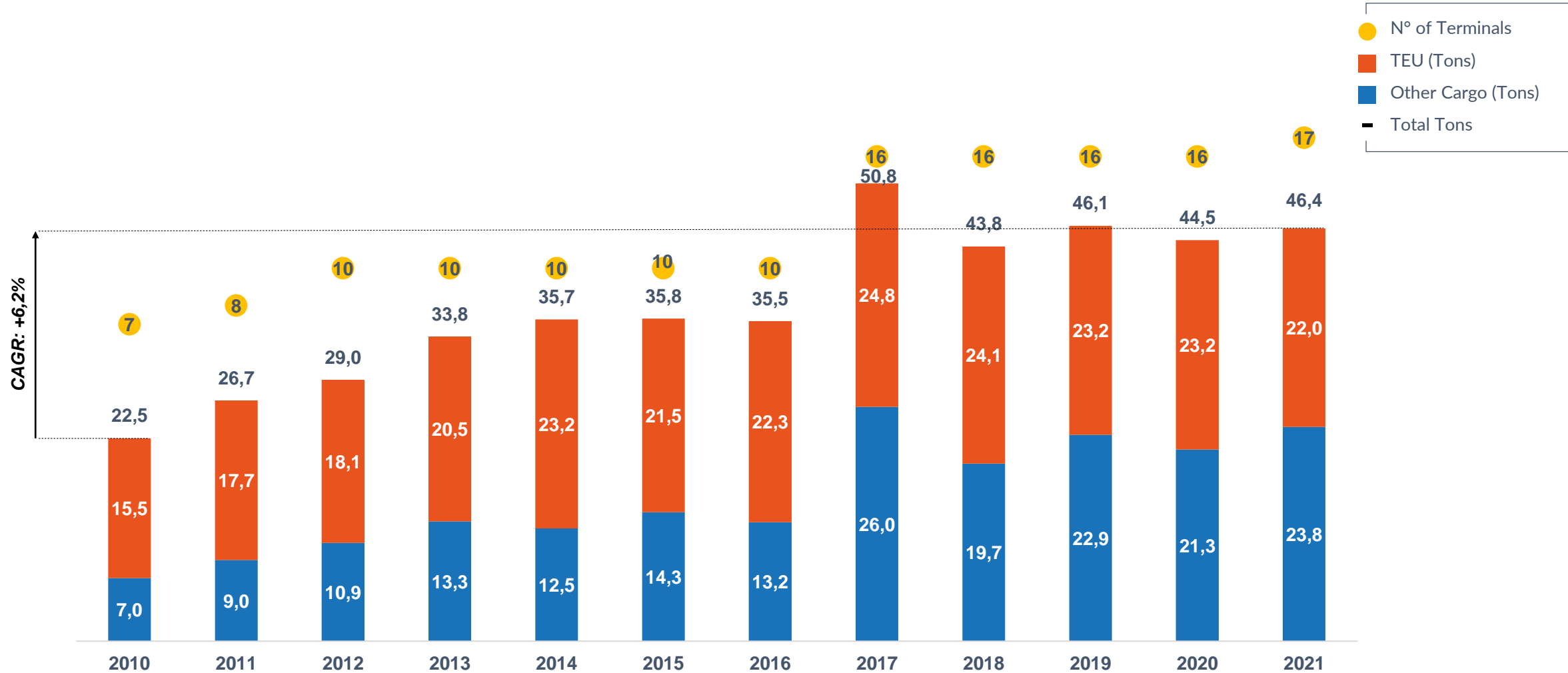
2,2 MILLION TEUS MOVED



1	<b>TPA</b> Terminal Puerto Arica	2	<b>PUERTO ANGAMOS</b> MEJILLONES - CHILE
3	<b>TGN</b> TERMINAL GRANDES DEL NORTE S.A.	4	<b>Puerto Mejillones</b>
5	<b>Terminal Mejillones</b>	6	<b>TPC</b> Terminal Puerto Coquimbo
7	<b>TPS</b> - VALPARAÍSO -	8	<b>Puerto Coronel</b>
9	<b>TERMINAL PUERTO ROSARIO</b>	10	<b>TGU</b> Terminales Graneleras Uruguayas S.A.
11	<b>MONTECON</b>	12	<b>Terminal Ontur</b> NUEVA PALMIRA
13	<b>Sagres</b>	14	<b>Sagres</b>
15	<b>Sagres</b>	16	<b>Sagres</b>
17	<b>AUTO MOBILE</b> INTERNATIONAL TERMINAL	18	<b>SUATILCO</b>
19	<b>ontemar</b> LOGISTICS	Stevedoring Companies	
20	<b>ULTRAPORT</b>	22	<b>SOUTHERN CARGO HANDLING</b>
21	<b>RIESTIBA</b>	23	<b>TIDAL TRANSPORT</b>



# Neltume Ports Transferred Volumes



# Expanding Neltume Ports Presence

## NORTH AMERICA



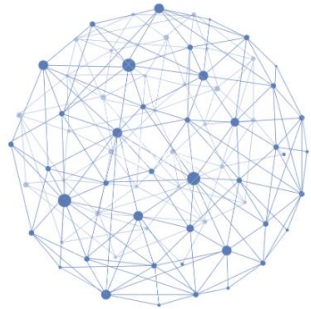
## SOUTH AMERICA



# Pointing to the Future

## New Targets? Growth focused in the Americas

### DETECT OPPORTUNITIES



#### Through Our Network

Use our customer database and network with DAIS and Kaptan as efficiently and widely as possible.



### ENTER THE MARKET



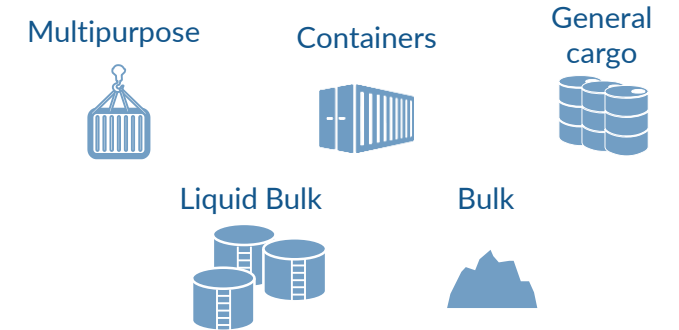
#### Through Stevedoring Companies



### DEVELOPMENT



#### Concession / Public / Private Port



# Pointing to the Future

We have to do this through the reinforcement of our **CULTURE** of...



Always with **Operational Excellence** and **Good Practices** ... by doing the right thing.





# NELTUME PORTS

Empowering Trade

