



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



## Welcome & Introduction

Richard von Appen



# Times of Uncertainty



# Political Events in the Americas



## USA

Joe Biden confirmed he will run for re-election. Donald Trump also expects to run in the 2024 elections despite numerous investigations against him.



## MEXICO

Andrés López Obrador government aims to increase control over strategic sectors. New electoral period begins due to presidential elections in July 2024.



## ECUADOR

The first round of presidential elections was affected by protests and the murder of the opposition candidate, Fernando Villavicencio. The second round will be held in October between Luisa Gonzalez and Daniel Noboa.



## PERU

After Castillo's failed self-coup, Peru has not found a way out of the biggest political and social crisis of the last years. Social conflicts due to distrust in the government of Dina Boluarte.



## BRAZIL

Lula da Silva was elected president for the third time with major economic, social and environmental challenges.



## ARGENTINA

Presidential elections will take place in October and a possible ballot will be held in November. Javier Milei, Patricia Bullrich and Sergio Massa were the most voted candidates in primary elections.



## CHILE

In December 2023, the second proposal for a new constitution will be plebiscite, closing a process after more than 3 years.

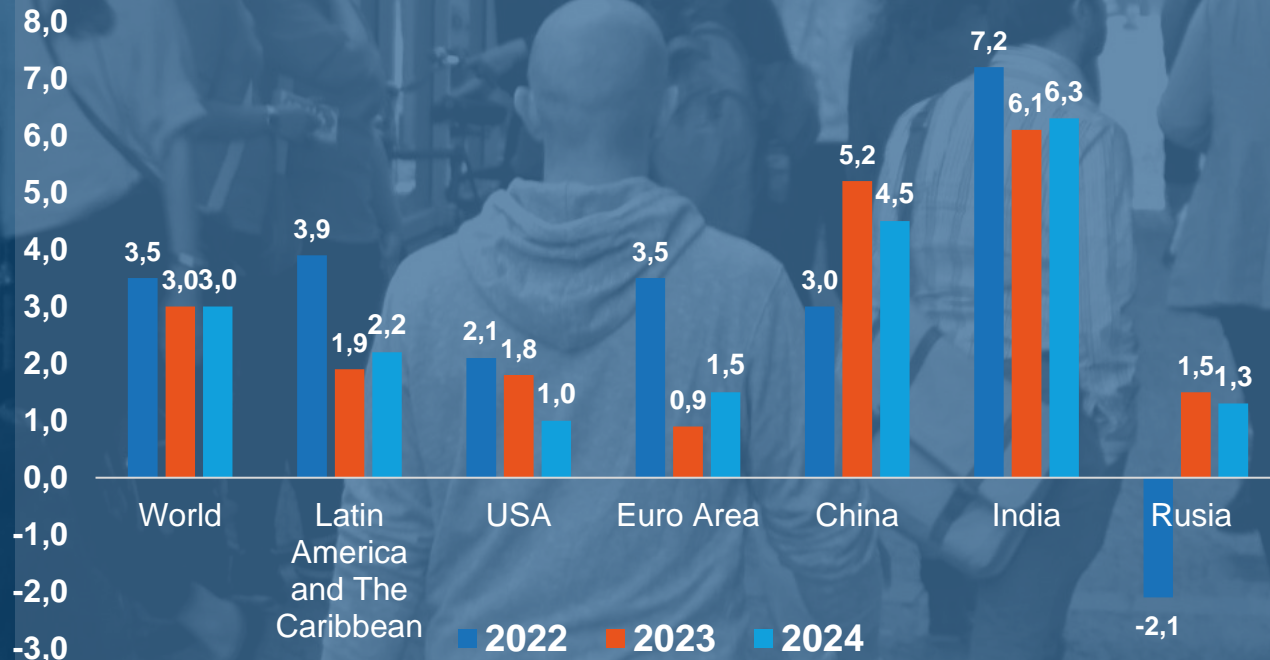
# Global Economic Situation

A Rocky Recovery

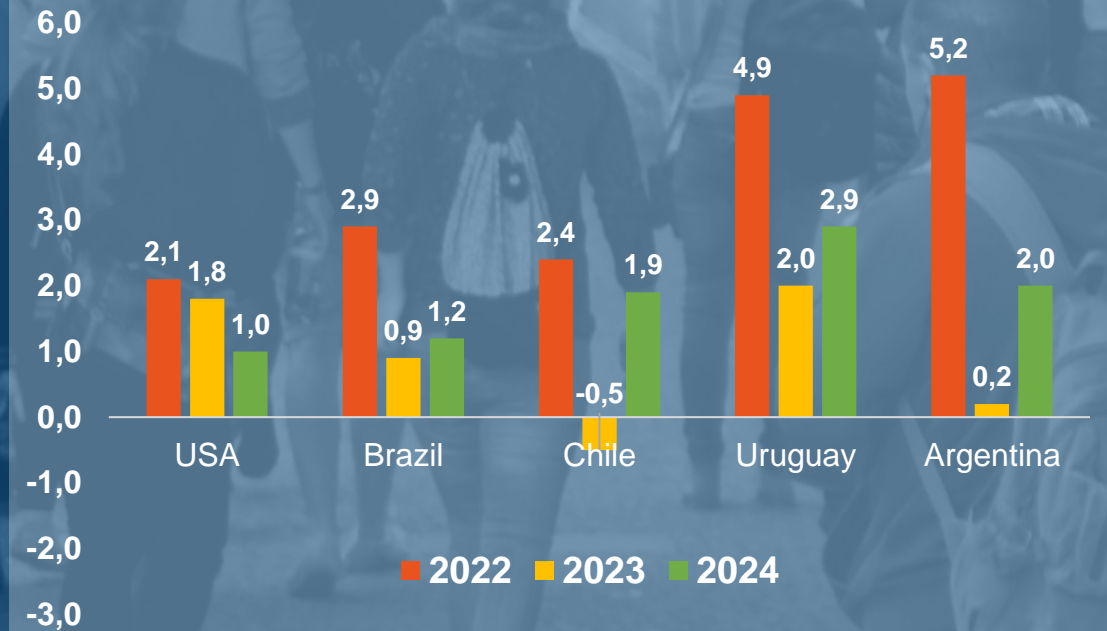
## Persistent challenges

The global recovery is slowing amid widening divergences among economic sectors and regions.

### Global GDP Growth Projections



### Neltume Ports Countries GDP Growth Projections



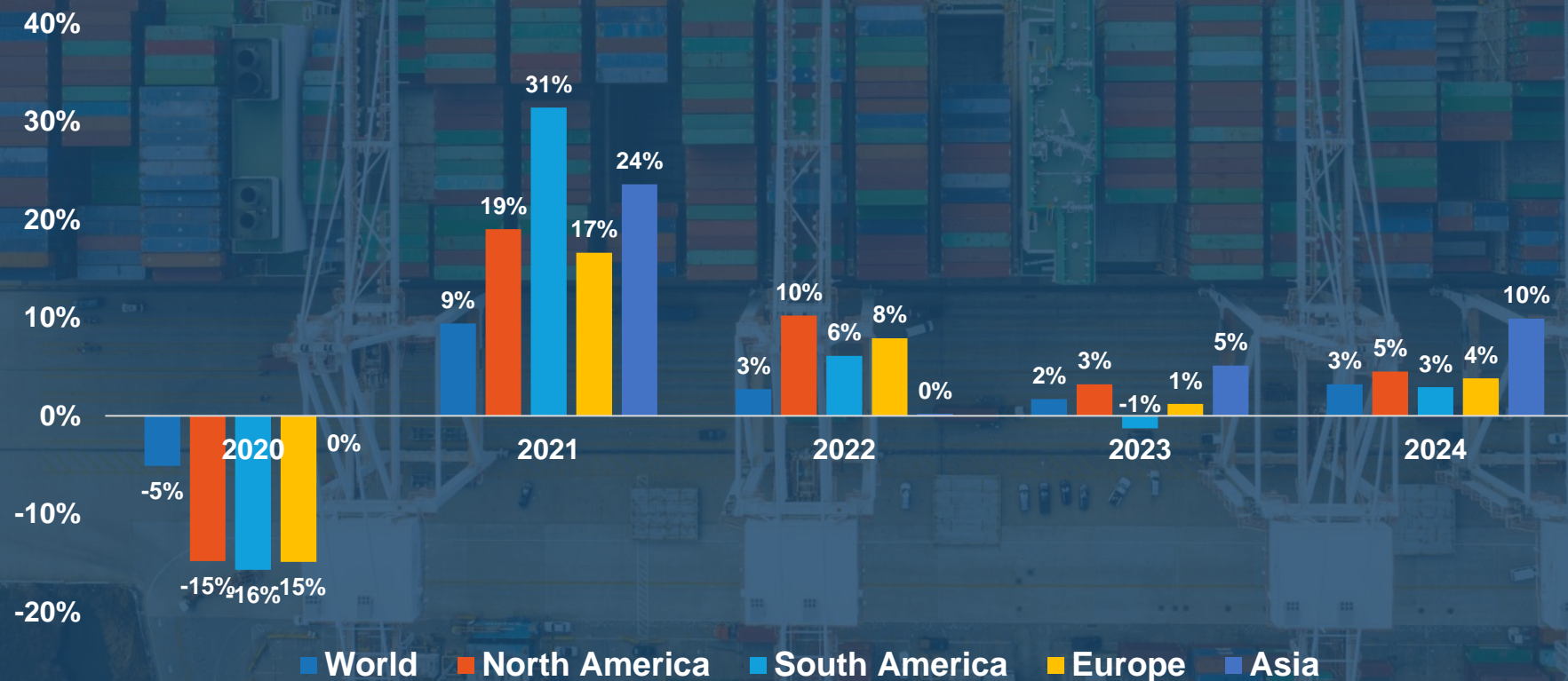
Source: IMF, World Economic Outlook, July 2023

# Global Trade

For the World it is projected an annual % change of 1,7% for 2023

North America is expected to record the strongest merchandise export growth of any WTO region in 2023 (3,3%), followed by Asia (2,5%). Imports of North America, South America and Europe are all expected to contract in 2023 (-0,1%, -1,6% and -1,5% respectively) due to weaker domestic demand.

### Merchandise Trade Volume

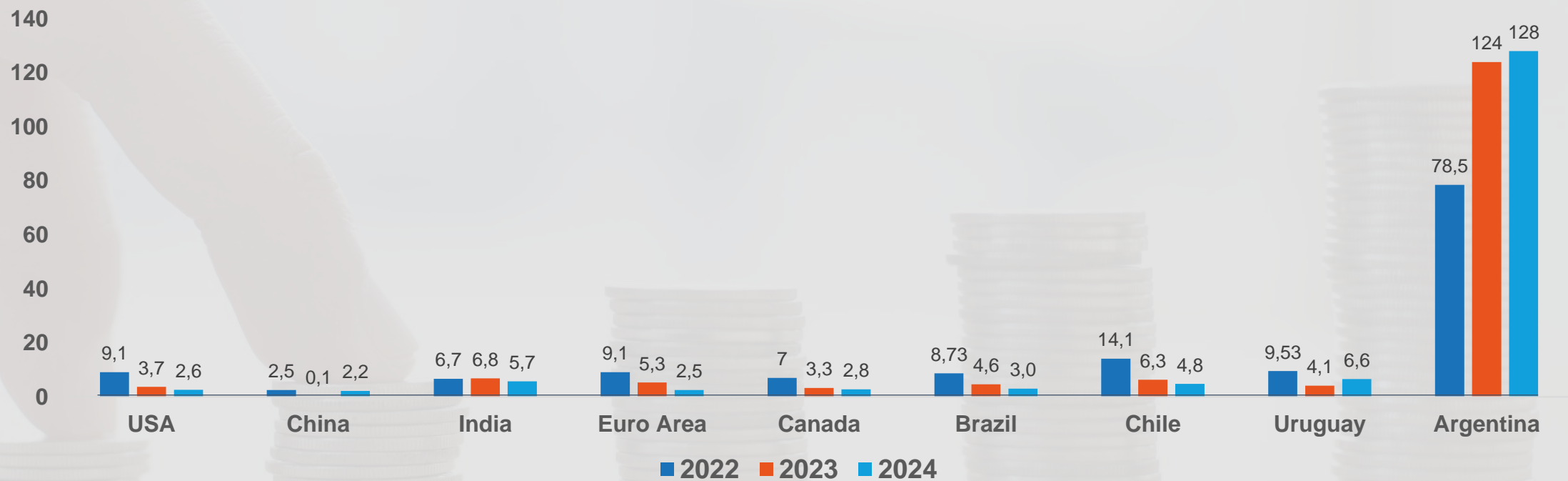


Source: WTO, July 2023



# Inflation

### Inflation Rates by Country



Source: Trading Economics, July 2023

OUR CHALLENGE

# SUSTAINABILITY

Put sustainability at the center, aspiring to be an efficient, profitable business in balance with society and the care of the ecosystem.



# Sustainability

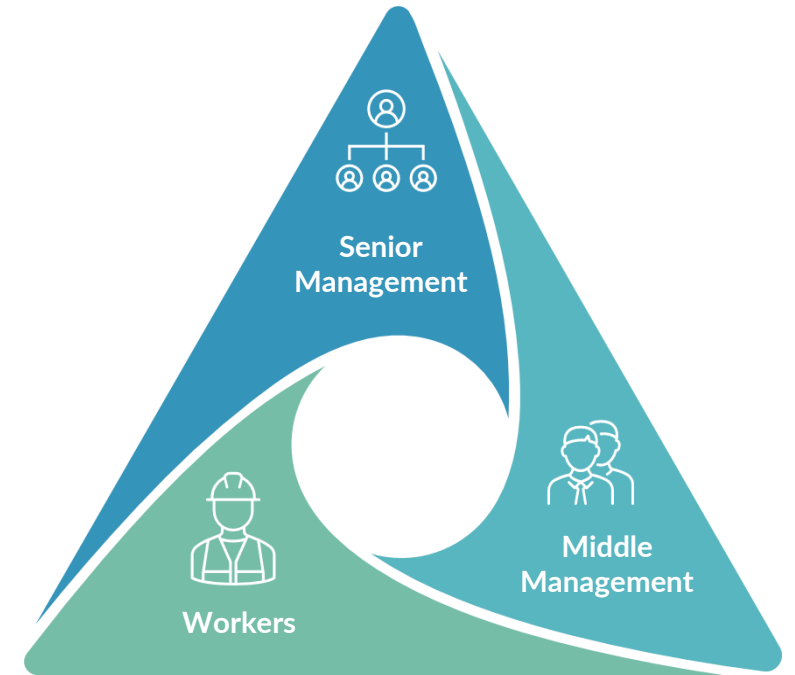
## Our Strategy



## Our main challenges



## Cultural Change in our Sustainability Pathway





# Safety – One of our Core Values



## Operational Excellence Culture

Ensure the safety of our people and care for the environment, ensuring operational continuity



## Proactive Risk Identification

Continuous assessment of risks to safeguard the safety and well-being of our employees and contractors



## Preventive Measures

The implementation of preventive measures is essential to protect our people's integrity, creating a safe environment, which, in turn, benefits productivity



## Stop Work

Stop Work emphasizes the importance of halting operations when risks or unsafe conditions are identified, allowing for review and correction of issues before proceeding, thereby reducing accidents and associated costs.

We have a challenge to improve **Safety** in our operations

Cultural Transformation

Growing need for leadership



Our goal

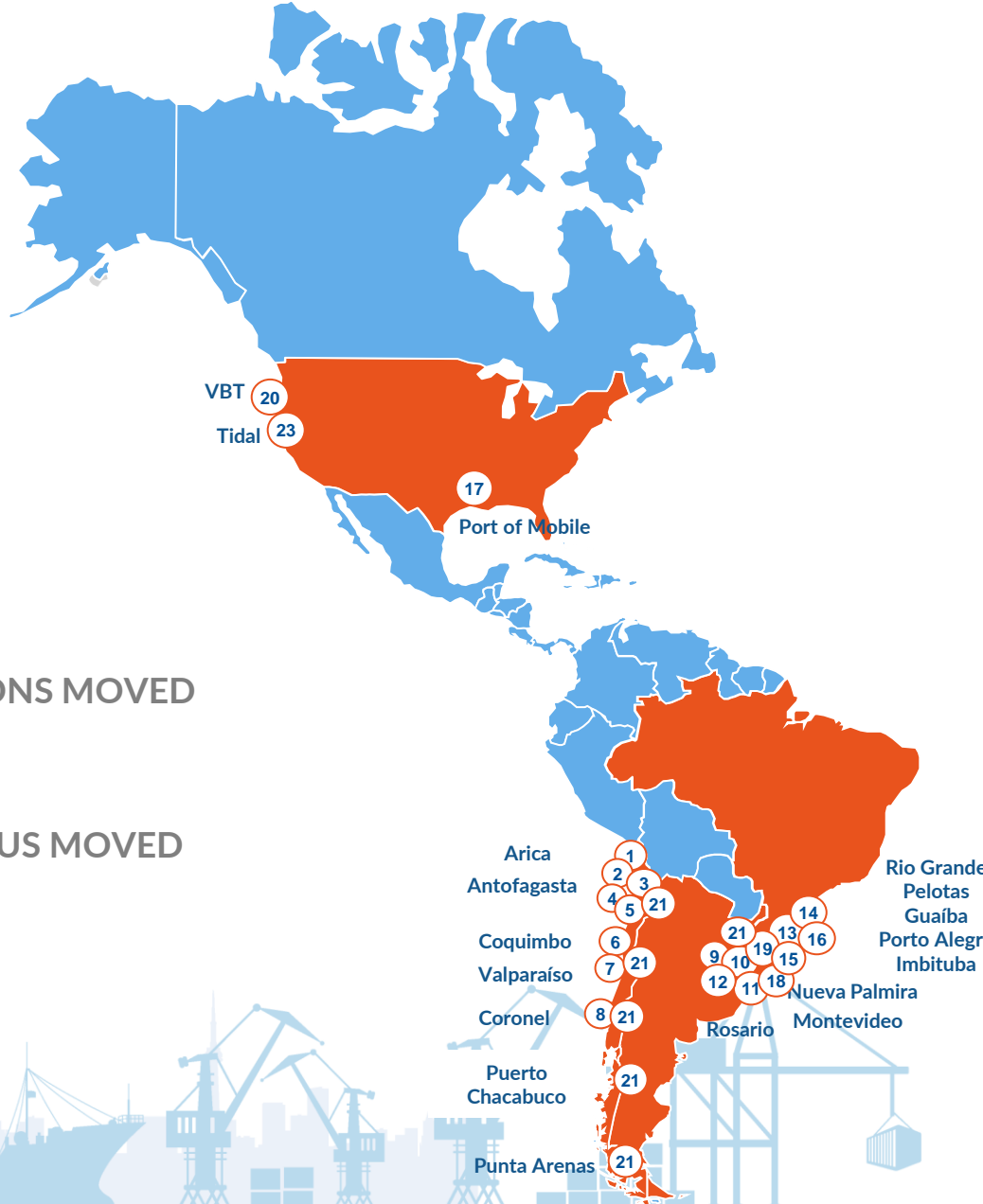


Incidents  
Accidents

# Neltume Ports Nowadays

5 American COUNTRIES

23 BUSINESS UNITS (SUBSIDIARIES AND ASSOCIATES)



THROUGHPUT 2022:

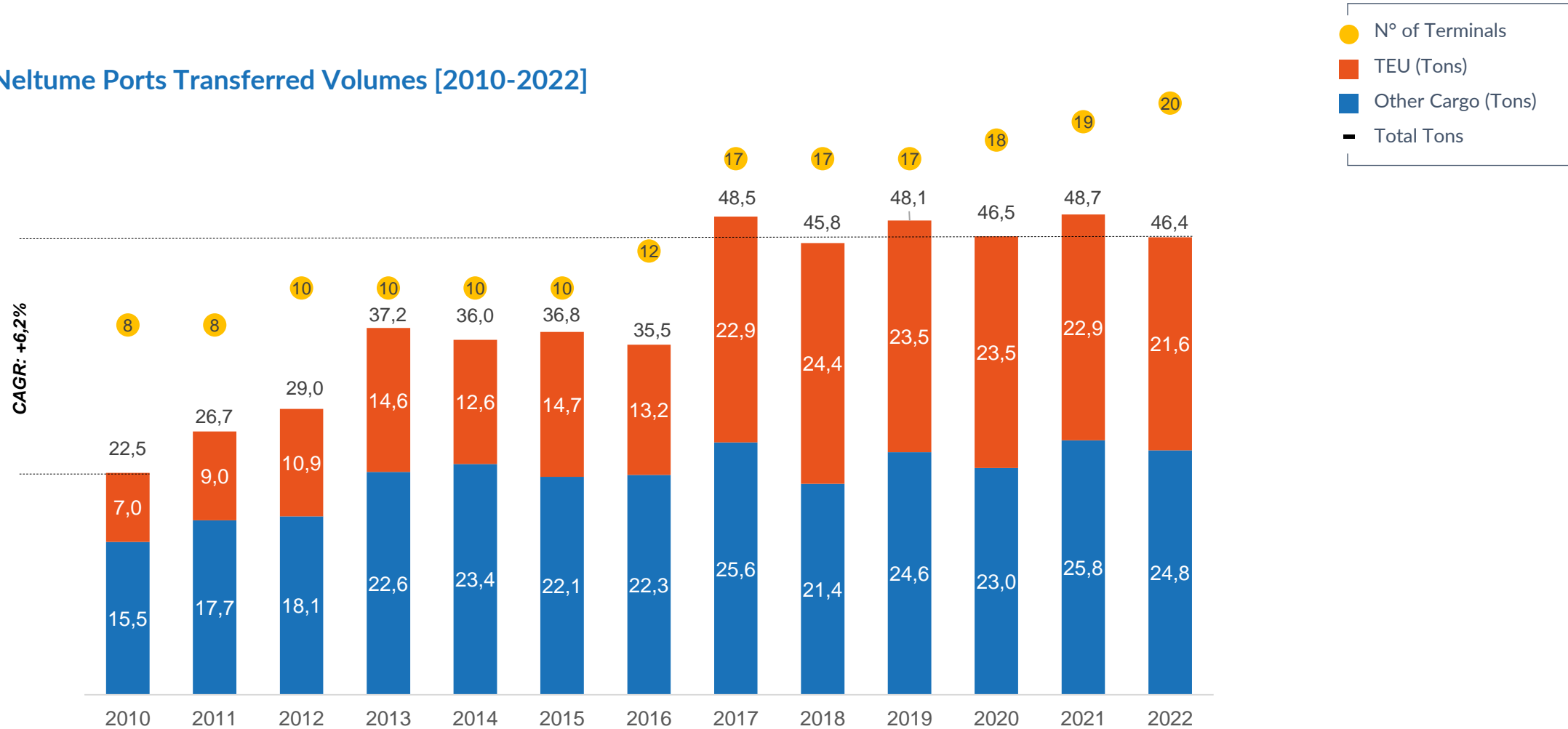
46,4 MILLION TONS MOVED

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> VALPARAISO	8	<b>Puerto Coronel</b>
9	<b>TPR</b> Terminal Puerto Rosario S.A.	10	<b>TGU</b> Terminales Graneleras Uruguayas S.A.
11	<b>MONTECON</b>	12	<b>Terminal Ontur</b> NUEVA PALMIRA
13	<b>Sagres (TLG)</b>	14	<b>Sagres (TLP)</b>
15	<b>Sagres (TPP)</b>	16	<b>Sagres (TLRG)</b>
17	<b>AUTO MOBILE</b> INTERNATIONAL TERMINAL	18	<b>SUATILCO</b>
19	<b>ontemar</b> LOGISTICS	20	<b>VBT</b>
Stevedoring Companies			
21	<b>ULTRAPORT</b>	22	<b>RIOESTIBA</b>
		23	<b>TIDAL TRANSPORT</b>

# Neltume Ports Transferred Volumes

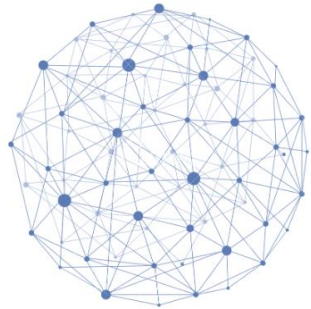
Neltume Ports Transferred Volumes [2010-2022]



# 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



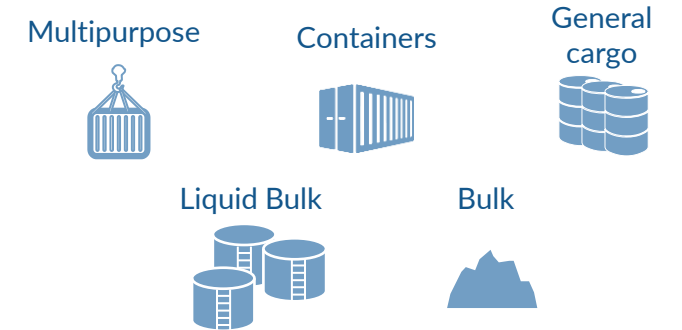
### Through Stevedoring Companies



DEVELOPMENT



### Concession / Public / Private Port





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