

December 2021

Supply chain

A challenging future

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Supplier



Manufacturer



Warehouse



Port

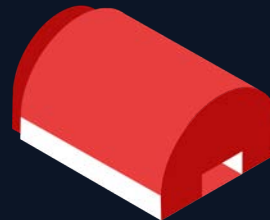
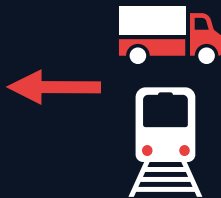
Supply chain



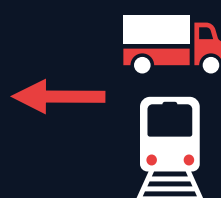
Consumer



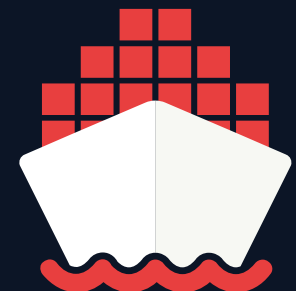
Retailer



Warehouse



Port



Shipper



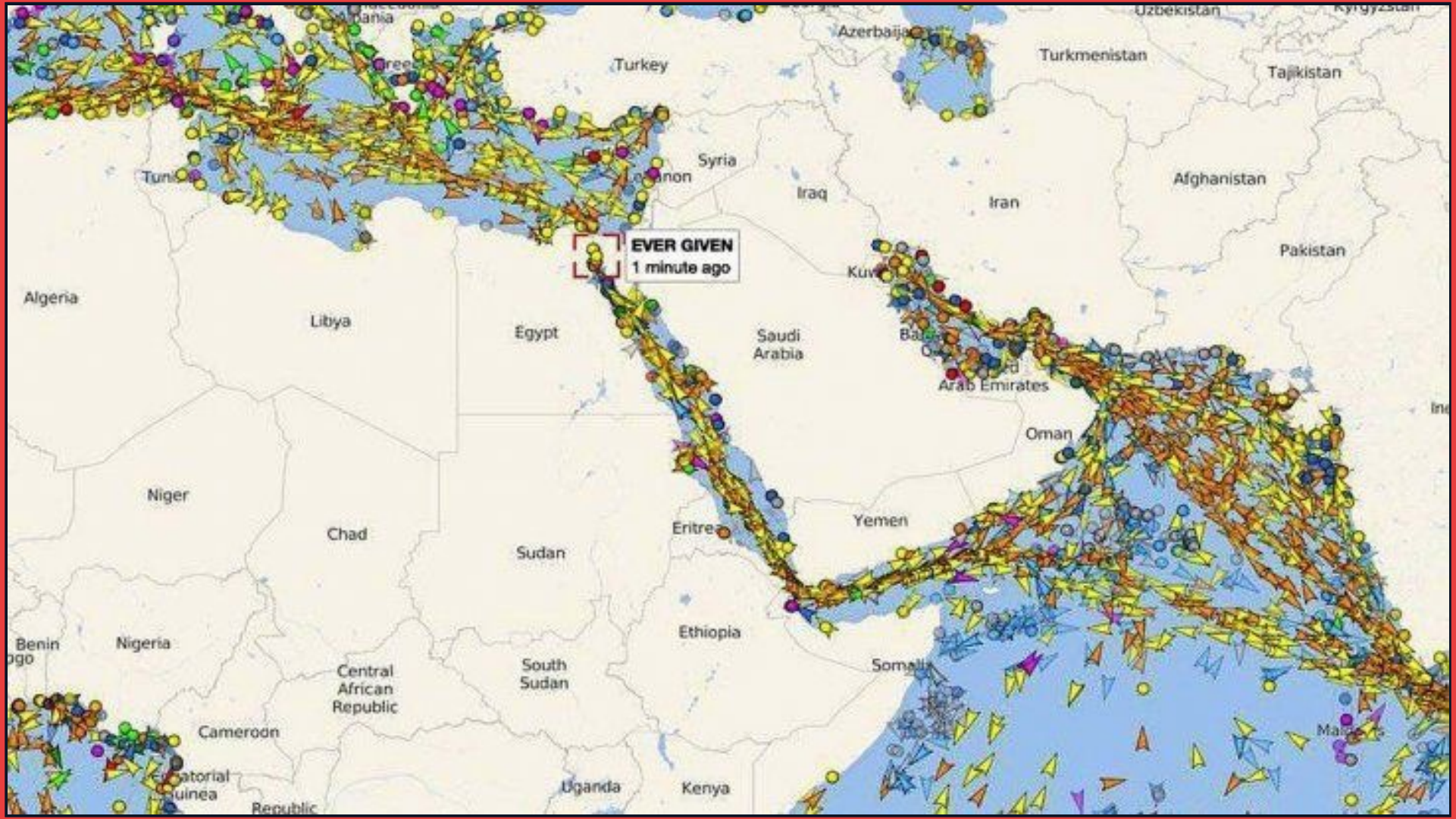
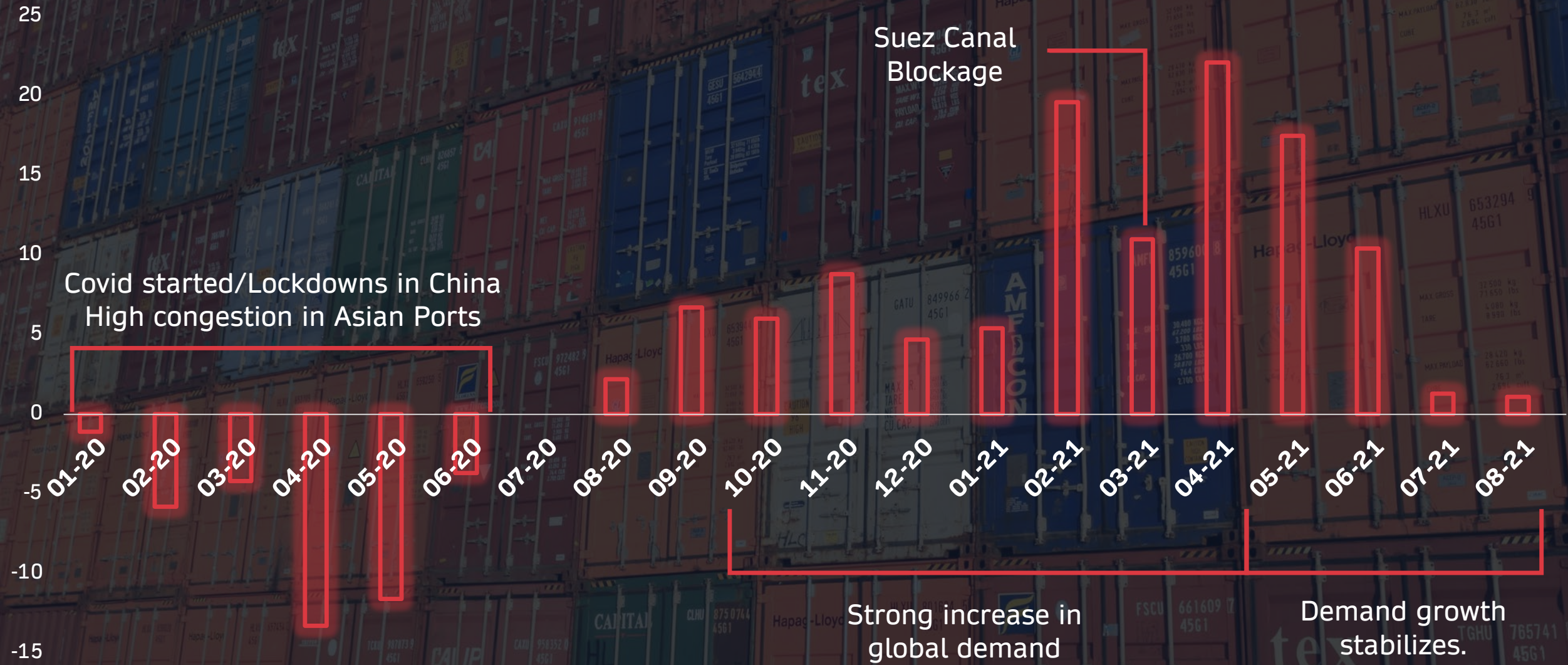


Photo: Vesselfinder / ambito.com

Global Demand Growth (%YoY)





Almost
8 days
of delay for vessel
arrivals

Average waiting times outside ports

Jan 2020 – Sep 2021 (hours)

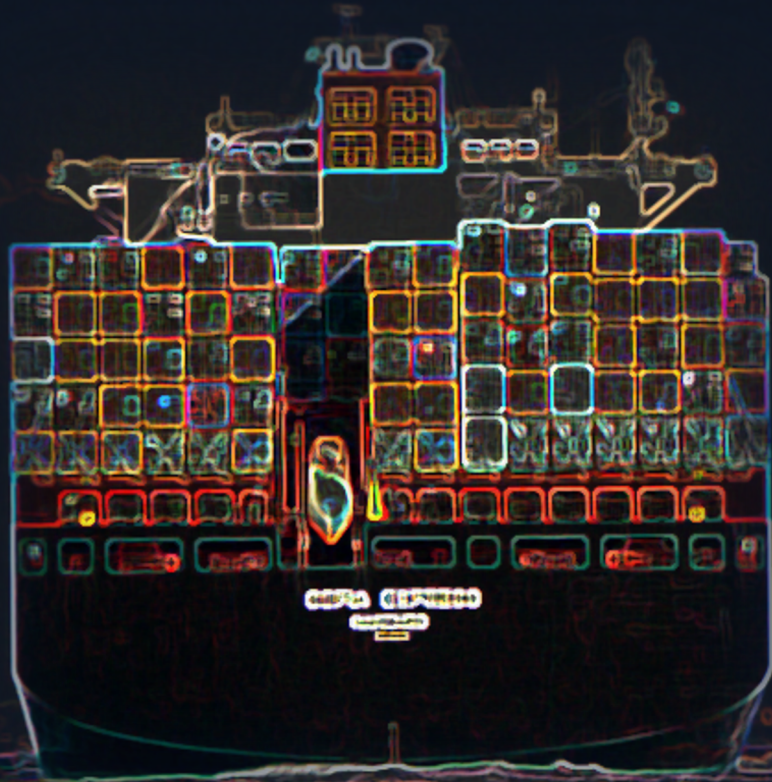


A glimpse of Long Beach/LA ports

Date: October 2021



Fleet deployment has adapted quickly to demand evolution.

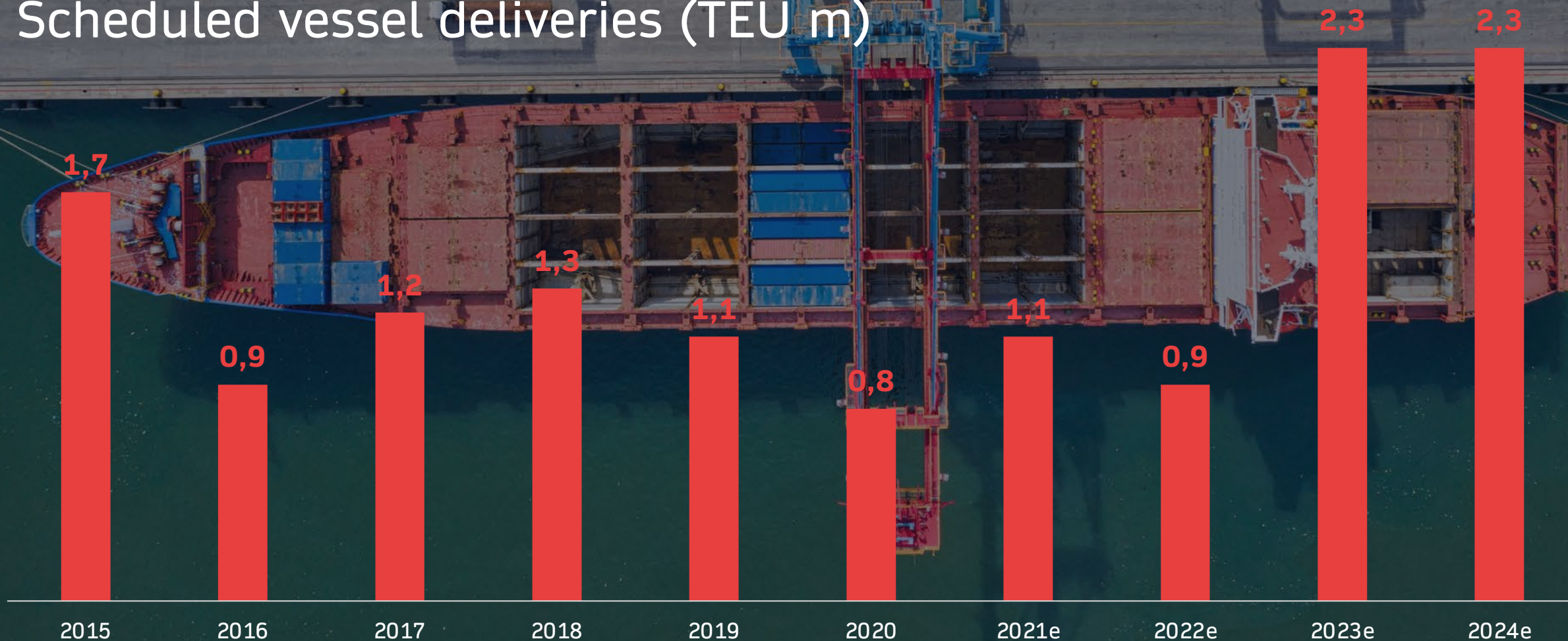


Less than
1%
of idle fleet

Source: Clarksons Research (November 2021)

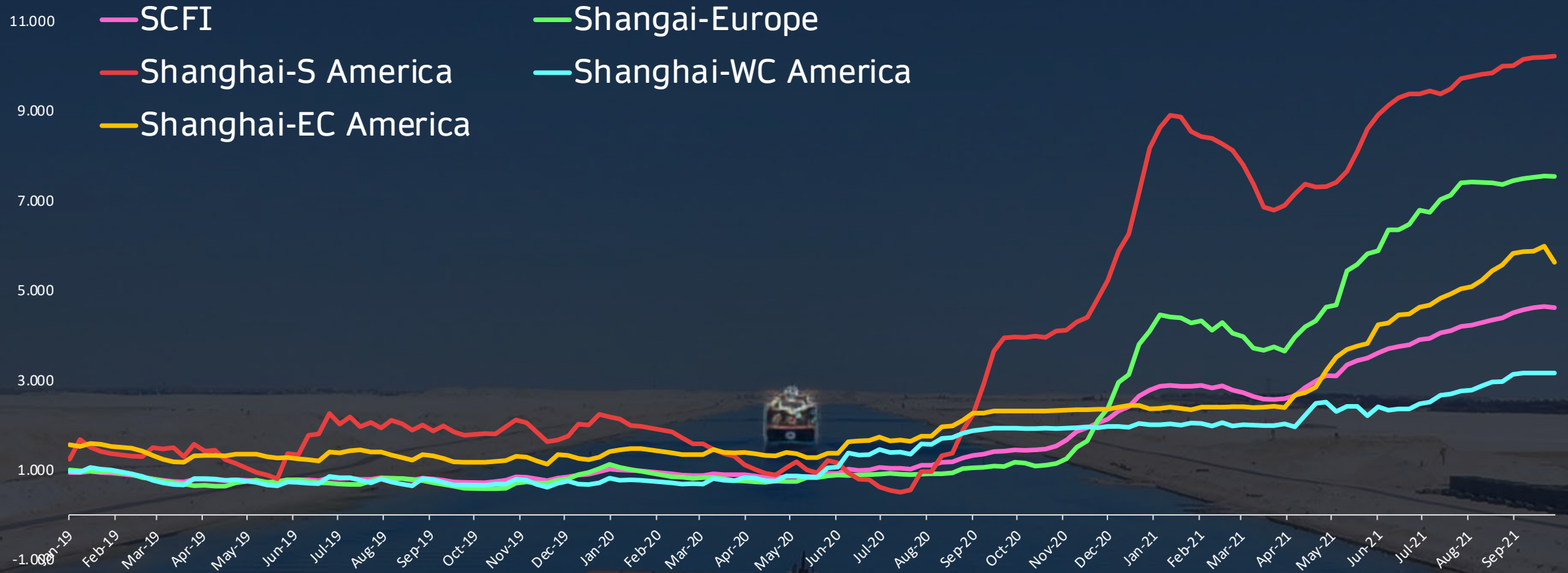
Recently ordered capacity will come into the market in 2023/2024

Scheduled vessel deliveries (TEU m)



All trades are impacted with rising tariffs

Freight Rates Evolution (US\$/TEU)



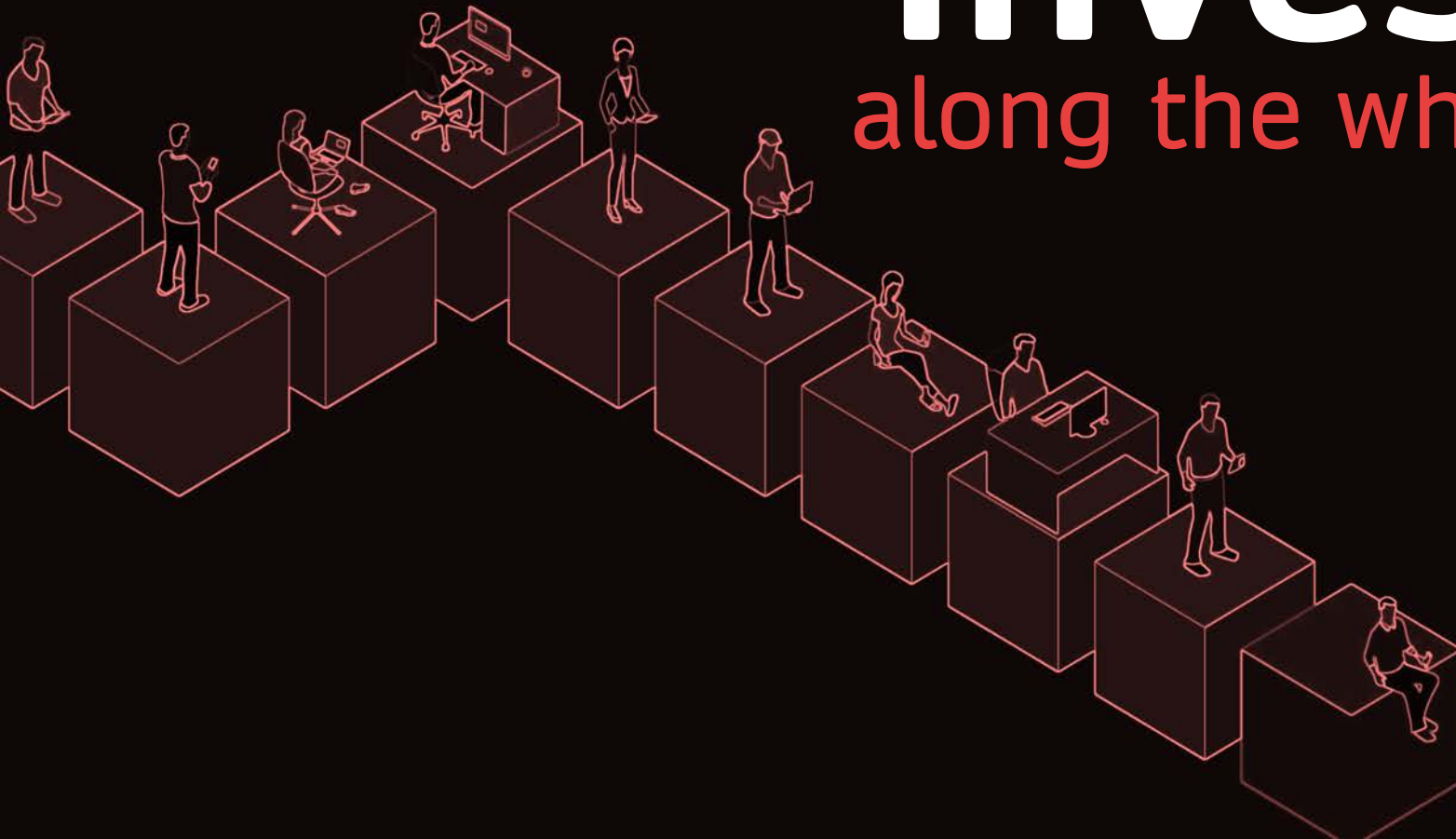


Perfect storm

a supply chain under pressure

Lack of investment

along the whole supply chain



Truck drivers & Warehouse personnel shortage: an inland bottleneck

“Chile:
Truck drivers unions
reveal a 10,000
drivers shortage”

Mundo Marítimo
March 31st, 2021

“US trucking industry is
short by a record 80,000
drivers amid the supply-
chain crisis”

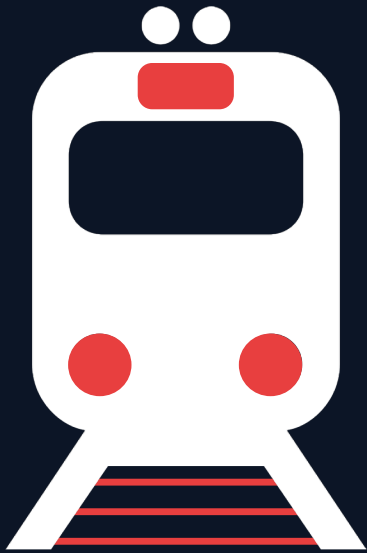
Business Insider
October 20th, 2021



Drivers shortage: a matter of human capital

- ✗ Ports do not work at night as a consequence of the elimination of the third shift.
- ✗ Move to last-mile delivery looking for better incomes and lifestyle.
- ✗ Insecurity problems.
- ✗ Short career.
- ✗ Less truck imports.

Chile needs to invest in infrastructure



**Railway
infrastructure**



**Ports
seawalls**

A person with dark hair, seen from the back, is looking up at a tall stack of shipping containers. The containers are in shades of red and white. The person is wearing a dark green jacket. The background is a dense stack of containers, with some labels visible. The text "How can we face the future?" is overlaid on the image in a large, bold font. The word "How" is red, and the rest of the text is white.

How can we face the future?



We need

**a new
approach**

to supply chain

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Thanks

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