

Associate of



International  
Chamber of Shipping

Shaping the Future of Shipping



**ABAC**

ASSOCIAÇÃO BRASILEIRA DOS  
ARMADORES DE CABOTAGEM

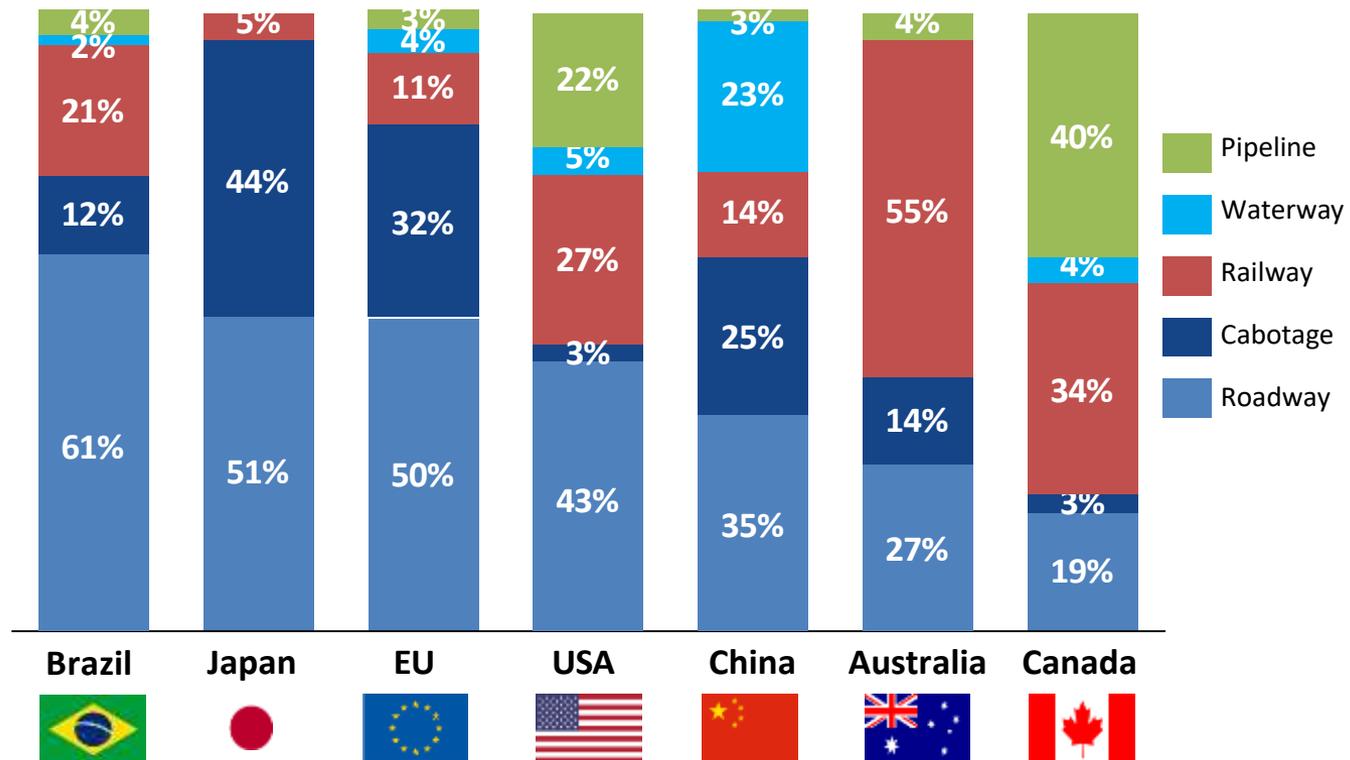
## Navigation - A strategic activity for the country

- National Security;
- Continental Country – More than 9,000 km of coastline and waterways;
- More than 85% of the population concentrated 400 km from the coast;
- Emission of greenhouse gases four times lower than those emission on roads;
- Greater cargo and crew security and safety, with fewer accidents compared to road transportation;

Some regulatory issues:

- Navigation carried out between ports or points in the national territory, using the sea routes or sea routes and inland waterways.
- Law 9,432/1997 + Law 14,301/2022 govern waterway transport, establishing the rules and conditions for cabotage navigation connecting ports along the country coastline.
- Cabotage transport in Brazil is limited to Brazilian Shipping Companies, which must have Brazilian-flagged ships in their fleet. (Amendment brought by Law 14,301/2022):
  - Owned or bareboat chartered by a Brazilian company;
  - Bareboat chartered proportional to the Brazilian Flagged ships that the Company already operates, and other conditions

- Cabotage in Brazil



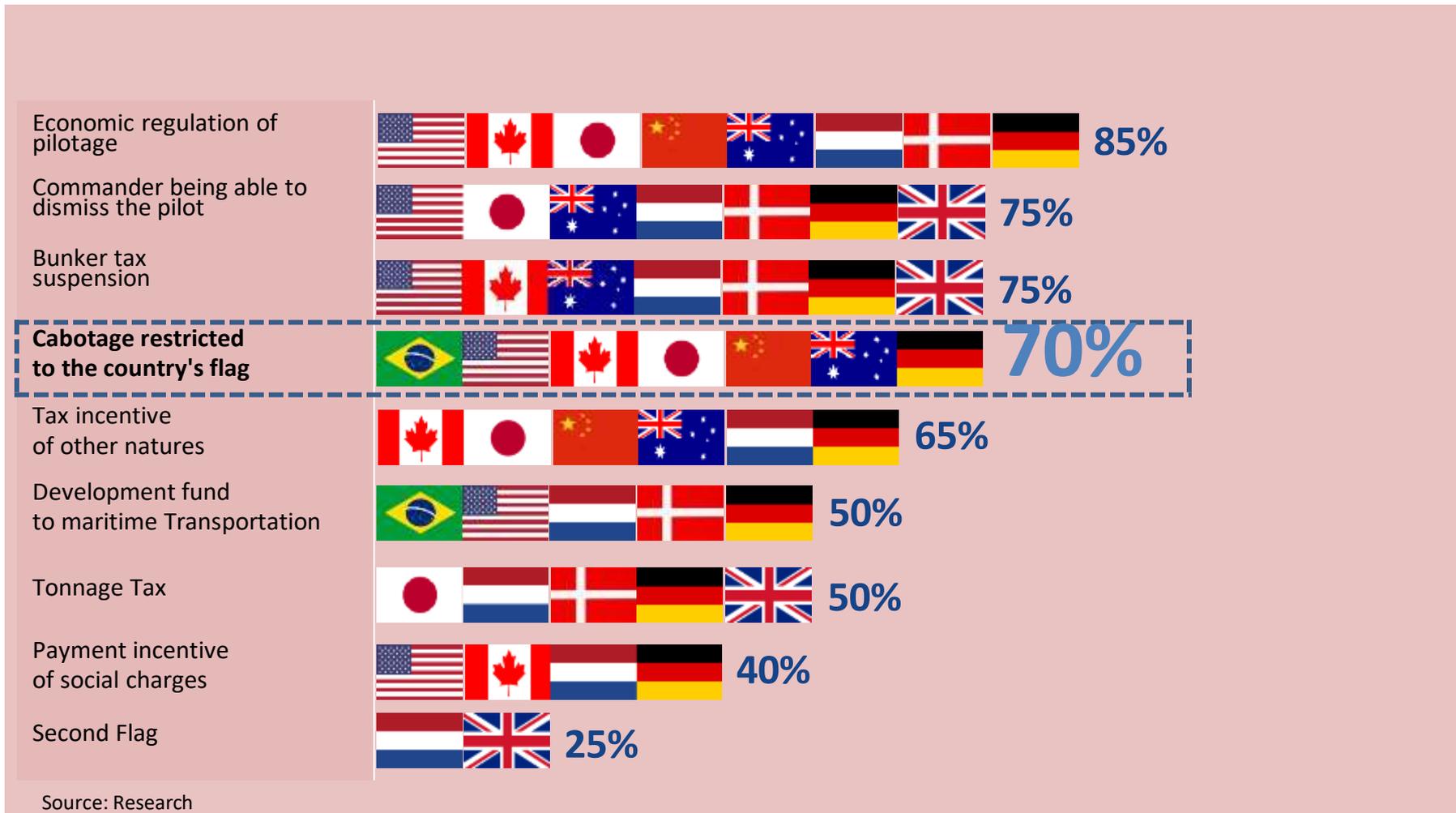
More than half of cabotage in Brazil involves only the movement of oil, derivatives and platform relief.

# Cabotage rules

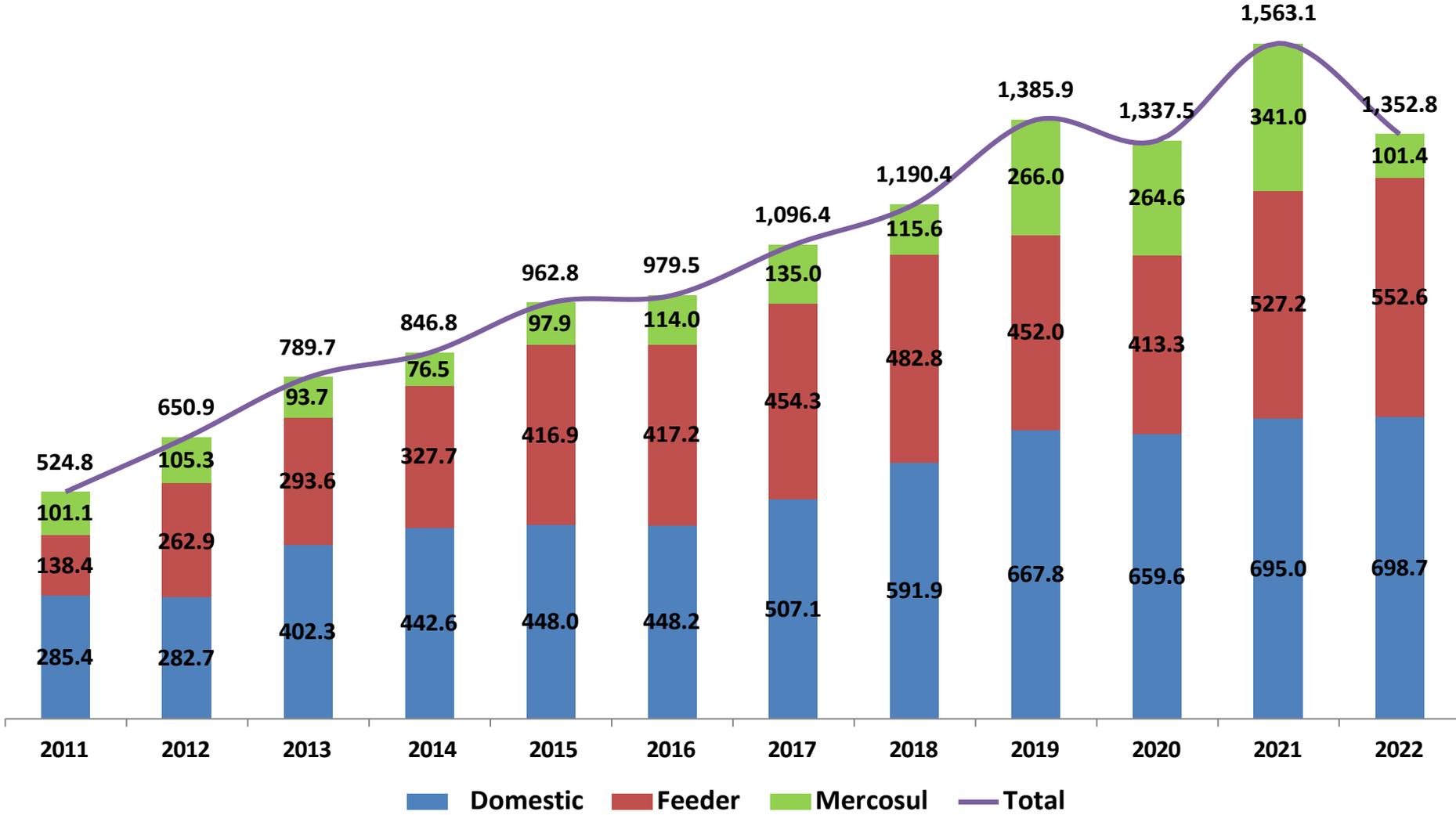
- Cabotage in Brazil

SHARES APPLIED IN CABOTAGE

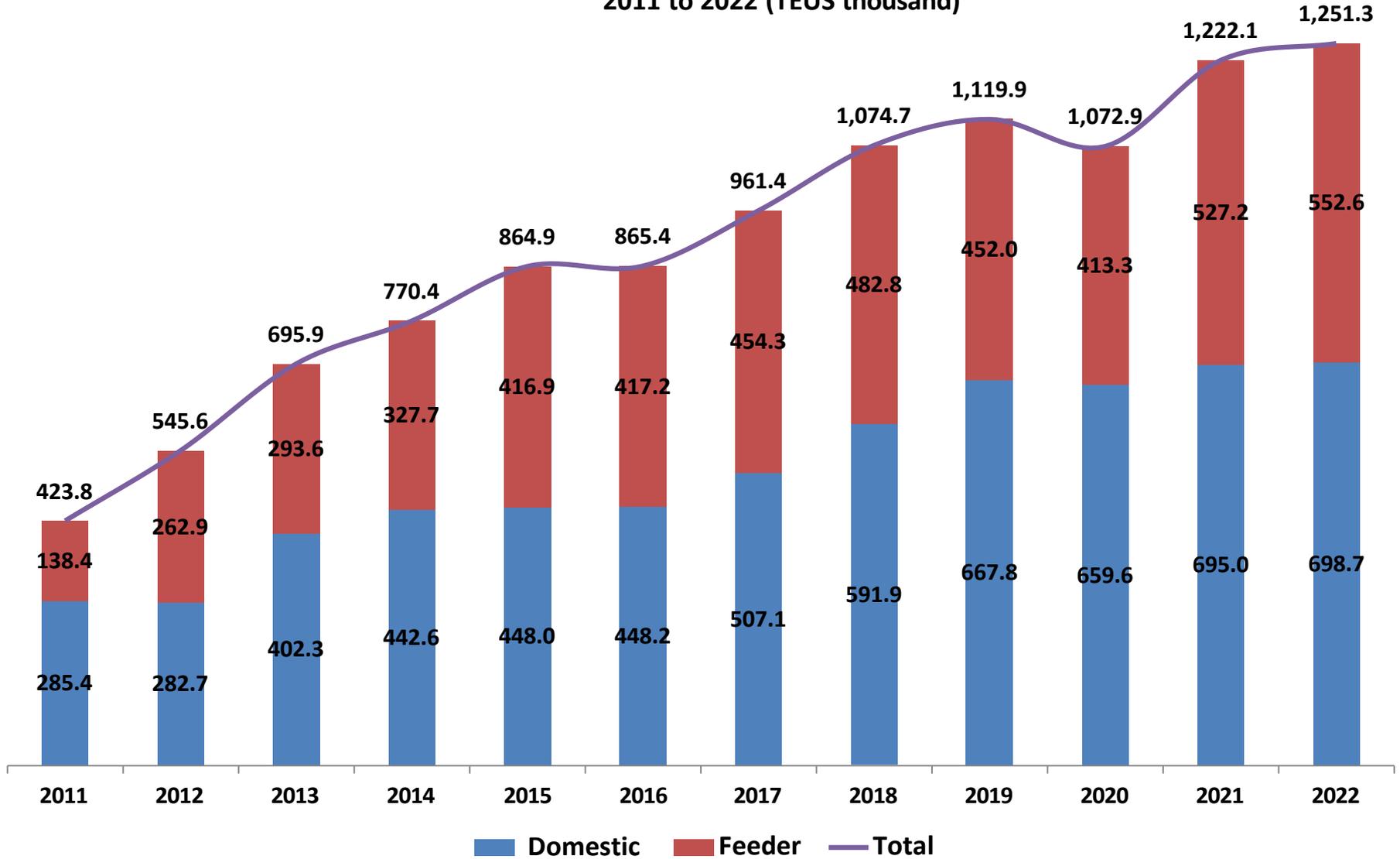
PERCENTAGE OF COUNTRIES PER SHARE



**Maritime Transport - Comparison of Volumes by Segment  
2011 to 2022 (TEUS thousand)**



### Maritime Transportation - Comparison of CABOTAGE Volume 2011 to 2022 (TEUS thousand)



## OBJECTIVES

- I.- expand the offer and improve the quality of transport by cabotage;
- II. encourage competition and competitiveness in the provision of cabotage services;
- III.- expand fleet availability in the national territory;
- IV.- encourage the training, capacity building and qualification of national seafarers;
- V.- stimulate the development of the Brazilian cabotage naval industry;
- VI. - review the link between coastal shipping policies and shipbuilding policies;
- VII.- encourage special cabotage operations, to serve cargo in a type, route or market that does not yet exist or is consolidated in Brazilian cabotage; and
- VIII.- optimize the use of resources arising from the collection of Additional Freight for the Renewal of the Merchant Marine - AFRMM

## Opportunities Created

- I.- expansion of the deadweight tonnage of its own vessels currently operating, registered in the name of the economic group to which the chartering company belongs, in accordance with the proportion to be defined by the Federal Executive Branch.
- II. - replacement of a similar type of vessel under construction in the country;
- III. - replacement of a vessel of a similar type under construction abroad;
- IV. - exclusive service of long-term transport contracts, under the terms set out in an act of the federal Executive Branch; and
- V. - exclusive provision of special cabotage operations, for a period of 36 (thirty-six) months, extendable for up to 12 (twelve) months, under the terms set out in an act of the federal Executive Branch.