NITAI LAB

Logística e Operações

LOGISTICS STRATEGY AND STRUCTURE · VERIFICATION

Route, cost and risk of the cargo, from origin to port.

For those buying, selling, shipping or investing in bulk in Brazil, including foreign companies.



Logistics and Verification

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THE NUMBERS

The price at origin is what is left after every leg

The buyer pays the reference price minus every cost up to the ship's hold. What is left is the netback.

Reference price index or quotation, adjusted for quality	−	**Ocean freight** vessel, route, season	−	**Port** tariff, demurrage, window	−	**Rail** tariff and capacity	−	**Road** from origin to terminal	−	**Taxes and finance** taxes, FX rate, payment terms	=	**Netback** the minimum price that still closes the deal

For the domestic market, swap vessel and port for freight to the customer.

ORIGIN
mine, farm, plant

ROAD
truck, B-double

TERMINAL
transhipment, storage

RAIL
wagon, slot, tariff

PORT
queue, vessel, loading

SCOPE

Logistics services

Feasibility and netback

The numbers leg by leg, by route and by freight and price scenario. The minimum price at origin and the route that is worth it.

Route and mode study

Road, rail and coastal shipping, and the port options, compared on cost, transit time, capacity and risk.

Logistics risk analysis

Dependence on a single operator, contracted capacity, take-or-pay terms, seasonality, regulation and counterparty.

Supply chain structuring

A logistics plan with route, capacities and contracts, shipment scheduling and follow-up of the flow.

Support for foreign companies

Who operates each leg, where the cargo gets stuck, who to talk to and what to check before signing.

Cargo

Iron and manganese ore, soybeans, corn and soybean meal, fertilisers such as potash (KCl) and urea, pig iron and steel products.

CARGO

Cargo I have handled



Grains and soybean meal



Fertiliser (potash, KCl)



Iron ore



Steel products

Photos from the terminals and mines where I worked.

VERIFICATION · FOR BUYERS AND FOR SELLERS

Before signing, checked against official sources

- **Mining title at ANM** (National Mining Agency): holder, stage, mineral
- **CFEM royalty up to date** (Brazil's federal mining royalty): whoever pays it is producing and selling
- **Environmental licence** for the operation and the volume offered
- **Counterparty** shareholders, years in business, litigation and public-sector debts
- **Quality report** read, not issued: what the grade means for the price
- **Capacity to move the cargo** route, slot and lead time to the port

DELIVERABLES

- Quick assessment, one page
- Mine dossier
- Counterparty dossier
- Logistics asset dossier

For sellers and those raising capital: the same dossier, ready before the buyer asks. I do not issue technical reports or legal opinions. I work alongside the geologist, the laboratory and the lawyer, and cover what falls between them.

WHO LEADS THE WORK

Nitai Morais

16 years at Vale and VLI: commercial roles, planning of terminals integrated with rail and port, and operations management, leading teams of up to 250 people. TPS implementation with TSSC, Toyota's own consulting arm.



BRL 500M
in annual revenue from the terminal operations he planned

15 Mt
of grain exported under plans he drew up

3.2 Mt
of pig iron exported in the account portfolio he managed, over two years

16 years
at Vale and VLI, with 18 promotions

NEXT STEP

An initial assessment of your case

Product, origin, destination and volume, or the documents you have received. I will reply with an initial view and what needs to be confirmed.

- Scope, timeline and fee agreed before work starts
- Confidentiality and non-circumvention both ways
- First conversation free of charge

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