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FACILITATION OF TRANSPORT AND TRADE IN LATIN AMERICA AND THE CARIBBEAN

Latin America and the Caribbean: the port terminal industry and activity indicators for 2019

Introduction

Carrying on with a long tradition of analysing issues relating to shipping and ports, two *FAL Bulletins* have dealt with the subject of port terminals so far this year. The first was part of the *Reflections on Infrastructure series*, which frequently appears in FAL Bulletins and other documents of the Economic Commission for

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This issue of the *FAL Bulletin* presents an inventory of all the port terminals in Latin America and the Caribbean, classifies them by specialization and provides an analysis of port activity in 2019.

The authors are Ricardo J. Sánchez, Senior Economic Affairs Officer, and Eliana P. Barleta, a consultant with the Infrastructure Services Unit of the Economic Commission for Latin America and the Caribbean (ECLAC).

UNITED NATIONS

ECLAC

Latin America and the Caribbean (ECLAC). Also authored by Ricardo J. Sánchez, it focused on incomplete contracts for long-term infrastructure concessions. The second is this issue, which catalogues all the port terminals in Latin America and the Caribbean and analyses the activity in these ports in 2019.

This inventory classifies the terminals in Latin America and the Caribbean according to their specializations: containers, passengers, liquid bulk cargo, dry bulk cargo or both, multipurpose terminals and roll-on/roll-off cargo terminals. For terminals that are used for more than one purpose, a further breakdown is given.

I. Inventory of port terminals in the region and their geographic locations

The research needed to prepare this inventory was conducted as part of a project of the Infrastructure Services Unit of ECLAC, headed up by Ricardo J. Sánchez. The field work was performed by María Alejandra Gómez Paz Fort, with assistance from Eliana P. Barleta and Silvana Sánchez Di Domenico.

A total of 1,515 terminals were surveyed in the 33 Latin American and Caribbean member States of ECLAC, plus associate members and other non-independent island territories in the Caribbean, bringing the total number of countries and territories covered by the survey to 50.

Table 1 gives the number of terminals in each category, the total number of terminals in each country or territory and the percentage of the regional total that they represent.

As may be seen from table 1, multipurpose terminals are the largest category, accounting for 33.9% of the regional total, followed by liquid bulk and dry bulk terminals, at 27.1% and 22.8%, respectively. Table 2 shows the percentage of the total that is represented by each type of terminal.

A breakdown by geographic location shows that 575 terminals are on the eastern coast of South America (38.0% of the regional total), while 390 are located on the western coast of South America (25.7% of the total). The Caribbean has 345 terminals (22.8%) and Central America has 205 (13.5%). Table 3 shows the number of each type of terminal in these four geographic categories, while table 4 shows what percentage of the regional total they represent.

Table 1
Latin America and the Caribbean: type of port terminal, by specialization
(Number of terminals and percentages)

Country/Territory	Containers	Passengers	Liquid bulk	Dry bulk	Dry and liquid bulk	Multipurpose	Roll on/ roll of	Total	Percentage of total
Anguilla		1				1		2	0.1
Antigua and Barbuda	1	2	1	1				5	0.3
Argentina	6	3	36	40	16	41		142	9.4
Aruba	1	1	1					3	0.2
Bahamas	3	6	6	4				19	1.3
Barbados		1	2	1				4	0.3
Belize	1		1	1		2		5	0.3
Bermuda	1	2	1			1		5	0.3
Bolivia (Plurinational State of)		13	2	2		8		25	1.7
Bonaire			1	1		1		3	0.2
Brazil	29	7	65	88		98	19	306	20.2
British Virgin Islands		4				3		7	0.5
Cayman Islands						3		3	0.2
Chile	1		36	23	1	36		97	6.4
Colombia	1		27	18		42		88	5.8
Costa Rica		2		1	1	4		8	0.5
Cuba	2	1	6	5		31		45	3.0
Curaçao	1	2	3	1		1		8	0.5
Dominica		1				2		3	0.2
Dominican Republic	1	4	10	6		9		30	2.0
Ecuador	3		6	3		6		18	1.2
El Salvador						4		4	0.3
French Guiana	1	1	1	1		3		7	0.5
Grenada	1	1	4			1		7	0.5
Guadeloupe	1		1	2		3		7	0.5
Guatemala	1	1	2	3	1	4		12	0.8
Guyana		1	9	4		5		19	1.3
Haiti	1	1	1	3		12		18	1.2
Honduras	1	3	4	1		3		12	0.8
Jamaica	1	4	4	6		2		17	1.1
Martinique	2	3	3	1		2		11	0.7
Mexico	11	20	51	46	4	37	2	171	11.3
Montserrat						2		2	0.1
Nicaragua		1				5		6	0.4
Panama	5	2	12	1		28		48	3.2
Paraguay	6		12	30	3	13	1	65	4.3
Peru	1	1	52	10		33		97	6.4
Puerto Rico	3	2	10	3		5		23	1.5
Saint Barthélemy						1		1	0.1
Saint Kitts and Nevis		3	3			1		7	0.5
Saint Lucia		2	1			3		6	0.4
Saint Vincent and the Grenadines	2	2		2		3		9	0.6
Sint Eustatius			1			1		2	0.1
Sint Maarten						1		1	0.1
Suriname			4	7		6		17	1.1

Table 1 (concluded)

Country/Territory	Containers	Passengers	Liquid bulk	Dry bulk	Dry and liquid bulk	Multipurpose	Roll on/ roll of	Total	Percentage of total
Trinidad and Tobago		2	8	7		6		23	1.5
Turks and Caicos Islands		1				3		4	0.3
United States Virgin Islands		3	1			5		9	0.6
Uruguay	1	4	2	3		11		21	1.4
Venezuela (Bolivarian Republic of)			21	21		21		63	4.2
Total	**89**	**108**	**411**	**346**	**26**	**513**	**22**	**1 515**	

Source: Economic Commission for Latin America and the Caribbean, on the basis of official figures.

Table 2
Latin America and the Caribbean: prevalence of each type of terminal, 2018
(Percentages of totals for each country)

Country/Territory	Containers	Passengers	Liquid bulk	Dry bulk	Dry and liquid bulk	Multipurpose	Roll on/roll of
Anguilla	0.0	50.0	0.0	0.0	0.0	50.0	0.0
Antigua and Barbuda	20.0	40.0	20.0	20.0	0.0	0.0	0.0
Argentina	4.2	2.1	25.4	28.2	11.3	28.9	0.0
Aruba	33.3	33.3	33.3	0.0	0.0	0.0	0.0
Bahamas	15.8	31.6	31.6	21.1	0.0	0.0	0.0
Barbados	0.0	25.0	50.0	25.0	0.0	0.0	0.0
Belize	20.0	0.0	20.0	20.0	0.0	40.0	0.0
Bermuda	20.0	40.0	20.0	0.0	0.0	20.0	0.0
Bolivia (Plurinational State of)	0.0	52.0	8.0	8.0	0.0	32.0	0.0
Bonaire	0.0	0.0	33.3	33.3	0.0	33.3	0.0
Brazil	9.5	2.3	21.2	28.8	0.0	32.0	6.2
British Virgin Islands	0.0	57.1	0.0	0.0	0.0	42.9	0.0
Cayman Islands	0.0	0.0	0.0	0.0	0.0	100.0	0.0
Chile	1.0	0.0	37.1	23.7	1.0	37.1	0.0
Colombia	1.1	0.0	30.7	20.5	0.0	47.7	0.0
Costa Rica	0.0	25.0	0.0	12.5	12.5	50.0	0.0
Cuba	4.4	2.2	13.3	11.1	0.0	68.9	0.0
Curaçao	12.5	25.0	37.5	12.5	0.0	12.5	0.0
Dominica	0.0	33.3	0.0	0.0	0.0	66.7	0.0
Dominican Republic	3.3	13.3	33.3	20.0	0.0	30.0	0.0
Ecuador	16.7	0.0	33.3	16.7	0.0	33.3	0.0
El Salvador	0.0	0.0	0.0	0.0	0.0	100.0	0.0
French Guiana	14.3	14.3	14.3	14.3	0.0	42.9	0.0
Grenada	14.3	14.3	57.1	0.0	0.0	14.3	0.0
Guadeloupe	14.3	0.0	14.3	28.6	0.0	42.9	0.0
Guatemala	8.3	8.3	16.7	25.0	8.3	33.3	0.0
Guyana	0.0	5.3	47.4	21.1	0.0	26.3	0.0
Haiti	5.6	5.6	5.6	16.7	0.0	66.7	0.0
Honduras	8.3	25.0	33.3	8.3	0.0	25.0	0.0
Jamaica	5.9	23.5	23.5	35.3	0.0	11.8	0.0
Martinique	18.2	27.3	27.3	9.1	0.0	18.2	0.0
Mexico	6.4	11.7	29.8	26.9	2.3	21.6	1.2
Montserrat	0.0	0.0	0.0	0.0	0.0	100.0	0.0
Nicaragua	0.0	16.7	0.0	0.0	0.0	83.3	0.0

Table 2 (concluded)

Country/Territory	Containers	Passengers	Liquid bulk	Dry bulk	Dry and liquid bulk	Multipurpose	Roll on/roll of
Panama	10.4	4.2	25.0	2.1	0.0	58.3	0.0
Paraguay	9.2	0.0	18.5	46.2	4.6	20.0	1.5
Peru	1.0	1.0	53.6	10.3	0.0	34.0	0.0
Puerto Rico	13.0	8.7	43.5	13.0	0.0	21.7	0.0
Saint Barthelémy	0.0	0.0	0.0	0.0	0.0	100.0	0.0
Saint Kitts and Nevis	0.0	42.9	42.9	0.0	0.0	14.3	0.0
Saint Lucia	0.0	33.3	16.7	0.0	0.0	50.0	0.0
Saint Vincent and the Grenadines	22.2	22.2	0.0	22.2	0.0	33.3	0.0
Sint Eustatius	0.0	0.0	50.0	0.0	0.0	50.0	0.0
Sint Maarten	0.0	0.0	0.0	0.0	0.0	100.0	0.0
Suriname	0.0	0.0	23.5	41.2	0.0	35.3	0.0
Trinidad and Tobago	0.0	8.7	34.8	30.4	0.0	26.1	0.0
Turks and Caicos Islands	0.0	25.0	0.0	0.0	0.0	75.0	0.0
United States Virgin Islands	0.0	33.3	11.1	0.0	0.0	55.6	0.0
Uruguay	4.8	19.0	9.5	14.3	0.0	52.4	0.0
Venezuela (Bolivarian Republic of)	0.0	0.0	33.3	33.3	0.0	33.3	0.0
Total	**5.9**	**7.1**	**27.1**	**22.8**	**1.7**	**33.9**	**1.5**

Source: Economic Commission for Latin America and the Caribbean, on the basis of official figures.

Table 3
Quantity of terminals, by location and by specialization
(Number of terminals)

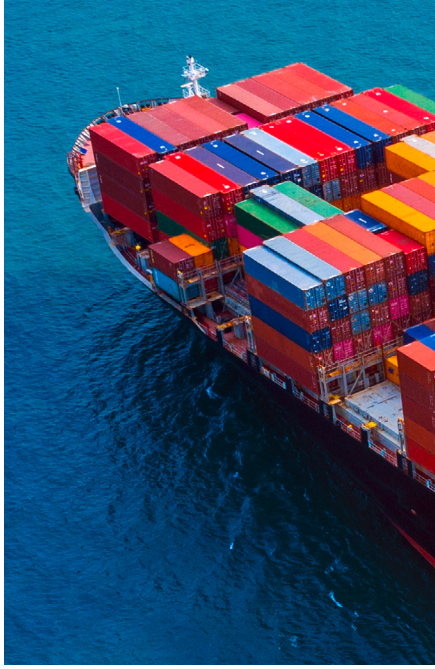
Coast	Containers	Passengers	Liquid bulk	Dry bulk	Dry and liquid bulk	Multipurpose	Roll on/ roll off	Total
East coast of South America	37	16	138	164	16	185	19	575
West coast of South America	12	14	135	86	4	138	1	390
The Caribbean	27	53	81	46	1	137	0	345
Central America	13	25	57	50	5	53	2	205
Total	**89**	**108**	**411**	**346**	**26**	**513**	**22**	**1 515**

Source: Economic Commission for Latin America and the Caribbean, on the basis of official figures.
Note: For the purposes of these calculations only, Colombia has been counted as being on the west coast of South America and the Bolivarian Republic of Venezuela as being on the east coast.

Table 4
Quantity of terminals, by location and by specialization
(Percentages of the total)

Coast	Containers	Passengers	Liquid bulk	Dry bulk	Dry and liquid bulk	Multipurpose	Roll on/ roll off	Total
East coast of South America	2.4	1.1	9.1	10.8	1.1	12.2	1.3	38.0
West coast of South America	0.8	0.9	8.9	5.7	0.3	9.1	0.1	25.7
The Caribbean	1.8	3.5	5.3	3.0	0.1	9.0	0.0	22.8
Central America	0.9	1.7	3.8	3.3	0.3	3.5	0.1	13.5
Total	**5.9**	**7.1**	**27.1**	**22.8**	**1.7**	**33.9**	**1.5**	

Source: Economic Commission for Latin America and the Caribbean, on the basis of official figures.
Note: For the purposes of these calculations only, Colombia has been counted as being on the west coast of South America and the Bolivarian Republic of Venezuela as being on the east coast.



Given the topographic complexity of the Caribbean, it has been divided into five geographic areas for the purposes of this analysis: south-west, central, north, east and the east coast of Central America. Only the terminals on the Caribbean coast of the countries with more than one coast (Colombia, Panama and all the Central American countries except El Salvador) have been considered. The number of terminals in each geographic grouping is shown below. The countries and territories in each of those groups are listed in brackets.

Table 5
Terminals in the Caribbean, by geographic area
(Number of terminals)

Caribbean coast	Containers	Passengers	Liquid bulk	Dry bulk	Dry and liquid bulk	Multipurpose	Total per coast
South-west (Panama, Colombia, Venezuela (Bolivarian Republic of) and Costa Rica)	5	6	55	42	1	66	221
Central (Jamaica, Haiti, Dominican Republic, Puerto Rico and Cayman Islands)	6	11	25	18	0	31	91
North (Bahamas, Cuba, and Turks and Caicos Islands)	5	8	12	9	0	34	68
East (Eastern Caribbean islands)	9	27	27	15	0	38	116
East coast of Central America (Nicaragua, Honduras and Guatemala)	1	4	4	1	0	7	17
Total	**26**	**56**	**123**	**85**	**1**	**176**	**467**

Source: Economic Commission for Latin America and the Caribbean, on the basis of official figures.
Note: Mexican ports on the Gulf of Mexico are not included.

Table 6 shows the percentages of all terminals in the Caribbean that are located in each of the geographic groupings.

Table 6
Terminals in the Caribbean, by geographic area
(Percentages of the total)

Caribbean coast	Containers	Passengers	Liquid bulk	Dry bulk	Dry and liquid bulk	Multipurpose	Total per coast
South-west (Panama, Colombia, Venezuela (Bolivarian Republic of) and Costa Rica)	1.1	1.3	11.8	9.0	0.2	14.1	37.5
Central (Jamaica, Haiti, Dominican Republic, Puerto Rico and Cayman Islands)	1.3	2.4	5.4	3.9	0.0	6.6	19.5
North (Bahamas, Cuba, and Turks and Caicos Islands)	1.1	1.7	2.6	1.9	0.0	7.3	14.6
East (Eastern Caribbean islands)	1.9	5.8	5.8	3.2	0.0	8.1	24.8
East coast of Central America (Nicaragua, Honduras and Guatemala	0.2	0.9	0.9	0.2	0.0	1.5	3.6
Total	**5.6**	**12.0**	**26.3**	**18.2**	**0.2**	**37.7**	

Source: Economic Commission for Latin America and the Caribbean, on the basis of official figures.

II. Container ports in Latin America and the Caribbean in 2019

For further statistical data, see (in Spanish): http://www.cepal.org/es/notas/movimiento-portuario-2019.

The throughput of container cargo in ports of Latin America and the Caribbean was virtually flat, with an increase of just 0.04% in 2019 over the preceding year. This figure is the outcome of an analysis of activity levels in a sample group of 126 ports and port areas in 36 countries and territories of the region.

In terms of total volume, activity in 2019 amounted to over 54.2 million TEU,[1] or 6.5% of total container throughput worldwide, which was a slight decrease relative to 2018, when it had equalled 7.1% of global throughput. Ten countries in Latin America and the Caribbean account for 81% of all cargo shipped in the region. In descending order of the number of TEUs, they are: Brazil, Panama, Mexico, Chile, Colombia, Peru, Ecuador, Dominican Republic, Argentina and Jamaica (see table 7).

Table 7
Top 10 countries, by throughput, 2019
(TEUs)

Rank	Country	Throughput (TEUs) 2019
1	Brazil	10 396 182
2	Panama	7 347 000
3	Mexico	7 100 644
4	Chile	4 496 578
5	Colombia	4 402 574
6	Peru	2 678 258
7	Ecuador	2 127 042
8	Dominican Republic	1 894 225
9	Argentina	1 771 628
10	Jamaica	1 647 609

Source: Prepared by the authors, on the basis of figures from the relevant port authorities and/or terminal, port or port area operators.

[1] Twenty-foot equivalent units. This is the standard metric for metal boxes that can be easily trans-shipped from one mode of transport (e.g. ships, trains and trucks) to another.

The top 20 ports in terms of throughput in 2019 are shown in table 8.

Table 8
Latin America and the Caribbean: top 20 ports, by throughput, 2019
(TEUs)

Rank	Country	Port	Throughput (TEUs) 2019
1	Panama	Colón / Cristóbal / Manzanillo (Caribbean)	4 379 477
2	Brazil	Santos (all terminals)	3 904 566
3	Mexico	Manzanillo (all terminals)	3 069 072
4	Colombia	Bahía de Cartagena (all terminals)	2 933 808
5	Panama	Balboa / Rodman (Pacific)	2 898 977
6	Peru	Callao (includes DPW and APM)	2 313 907
7	Ecuador	Guayaquil (all terminals)	1 943 197
8	Chile	San Antonio	1 709 642
9	Jamaica	Kingston	1 647 609
11	Argentina	Buenos Aires (includes Dock Sud)	1 485 328
10	Puerto Rico	San Juan	1 404 602
12	Bahamas	Freeport	1 396 568
13	Mexico	Lázaro Cárdenas (all terminals)	1 318 732
14	Dominican Republic	Caucedo	1 263 991
15	Brazil	Itajaí (all terminals, including Navegantes/Portonave)	1 233 262
16	Costa Rica	Limón-Moin	1 232 308
17	Mexico	Veracruz	1 144 156
18	Colombia	Buenaventura (all terminals)	1 121 267
19	Chile	Valparaíso	898 715
20	Mexico	Altamira / Tampico	877 396

Source: Prepared by the authors, on the basis of figures from the relevant port authorities and/or terminal, port or port area operators.

As shown in table 2, the largest container shipping volumes are in ports having more than one commercial operator. Among single-operator ports, the five largest (in descending order) are: the Port of Cartagena (CTG), Colombia; Manzanillo International Terminal (MIT), Panama; SSA in Manzanillo, Mexico; Port of Balboa, Panama; and Port of Kingston, Jamaica (see table 9).

Table 9
Latin America and the Caribbean: five largest single-operator terminals, 2019
(Millions of TEUs)

Rank	Country	Terminal operator	Throughput in 2019 *(millions of TEUs)*
1	Colombia	CTG	2.9
2	Panama	MIT	2.5
3	Mexico	SSA Manzanillo	2.3
4	Panama	Balboa	1.9
5	Jamaica	Kingston	1.6

Source: Prepared by the authors, on the basis of figures from the relevant port authorities and/or terminal, port or port area operators.
Note: The two terminals that move the largest volume of containers are in Santos, Brazil: BTP and Tecon Santos Brasil. The estimates obtained for this study indicate that they follow Kingston, Jamaica, in the rankings.

The percentage of total throughput represented by container trans-shipments[2] was also analysed. In the top 10 ports, trans-shipment accounts for nearly 28% of the total throughput of the 125 ports in 36 countries and territories that were considered. The percentages of the total throughput accounted for by trans-shipments in the top 20 trans-shipment ports are shown in table 10.

Table 10
Latin America and the Caribbean: top 20 trans-shipment ports, 2019
(TEUs and percentages of total throughput)

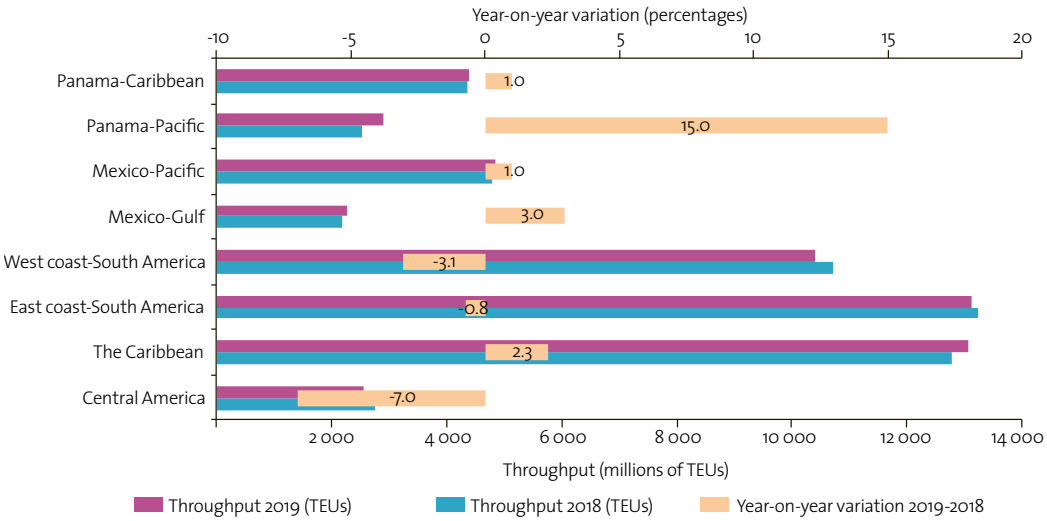
Rank	Country	Port	Throughput (TEUs) 2019	Trans-shipment (TEUs) 2019	Trans-shipments as a percentage of total throughput in 2019
1	Panama	Colón/Cristóbal/ Manzanillo (Caribbean)	4 379 477	3 804 511	86.9
2	Panama	Balboa/Rodman (Pacific)	2 898 977	2 600 683	89.7
3	Colombia	Bahía de Cartagena	2 933 808	2 118 642	72.2
4	Bahamas	Freeport	1 396 568	1 354 671	97.0
5	Jamaica	Kingston	1 647 609	1 319 760	80.1
6	Mexico	Manzanillo	3 069 072	1 103 098	35.9
7	Brazil	Santos	3 904 566	1 093 440	28.0
8	Dominican Republic	Caucedo	1 263 991	581 795	46.0
9	Brazil	Port of Manaus	578 779	512 400	88.5
10	Brazil	Suape	476 353	499 800	104.9
11	Peru	El Callao (includes DPW and APM)	2 313 907	477 180	20.6
12	Mexico	Lázaro Cárdenas	1 318 732	397 188	30.1
13	Colombia	Buenaventura (all terminals)	1 121 267	370 640	33.1
14	Uruguay	Montevideo	747 100	305 200	40.9
15	Brazil	Pecém	406 132	244 528	60.2
16	Brazil	Itapoá	735 139	228 520	31.1
17	Brazil	Rio Grande	782 338	223 366	28.6
18	Brazil	Itajaí (includes Navegantes, Portonave)	1 233 262	205 320	16.6
19	Brazil	Itaguaí/Sepetiba	253 987	135 720	53.4
20	Argentina	Buenos Aires (includes Dock Sud)	1 485 328	118 602	8.0

Source: Prepared by the authors, on the basis of figures from the relevant port authorities and/or terminal, port or port area operators.
Note: In the case of Brazil, trans-shipments were estimated on the basis of the increase in throughput for 2018.

In 2019, the volume of operations slipped by -0.8% in ports and port areas along the eastern coast of South America and was down by -3.1% in ports and port areas along the western coast. Caribbean ports (including those on the Caribbean coast of Colombia but not those of the Bolivarian Republic of Venezuela) witnessed a 2.3% increase in total container movements, whereas Central American ports (excluding those of Mexico) registered a drop of -7.0%. Operations were up by 3.0% over their 2018 level along the Gulf of Mexico and by 1.0% at ports along Mexico's Pacific coast. In Panama, Pacific coast port operations jumped by 15.0%, while those of Panamanian ports on the Caribbean coast edged up by 1.0%. Throughput for 2018 and 2019 and year-on-year variations for each region are depicted in figure 1.

[2] The term "trans-shipment" refers to the transfer of cargo from one ship to another at a port for transport to a foreign destination.

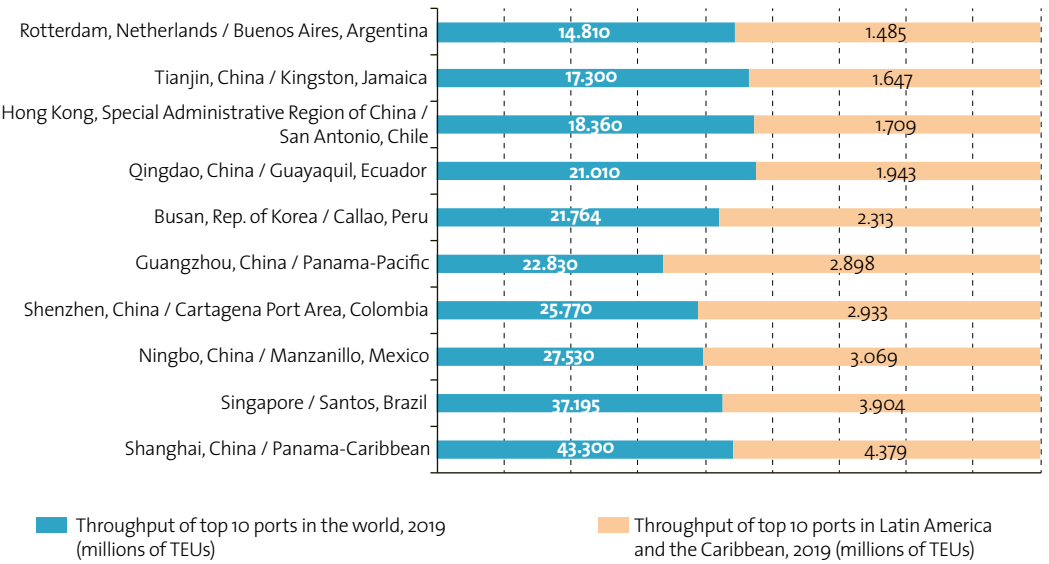
Figure 1
Year-on-year variations, by region, 2019 and 2018
(TEUs and percentages)



Source: Prepared by the authors, on the basis of figures from the relevant port authorities and/or terminal, port or port area operators.

Figure 2 illustrates how the throughput of the 10 top container ports in the world compared with the top 10 container ports in Latin America and the Caribbean in 2019.

Figure 2
Comparison of throughout of the top 10 ports in the world and the top 10 ports in Latin America and the Caribbean, 2019
(Millions of TEUs)



Source: Prepared by the authors, on the basis of figures from the relevant port authorities and/or terminal, port or port area operators for Latin America and the Caribbean, and global figures from Dynamar, DynaLiners Weekly, 8/20, 21 February 2020.

III. The impact of COVID-19 on ports in the region and worldwide in 2020

While port operations were generally stable in 2019 relative to their 2018 levels, in 2020 all the projections regarding their stability and future growth have to be revisited in the light of the impact of the COVID-19 pandemic. In the past few months, the world has witnessed a drastic change in people's daily lives, and that change has also had a huge impact on business, trade and shipping. The outbreak of the pandemic has radically altered economic and commercial expectations for 2020. The growth rate for worldwide container trade of 3.6% that had been projected in the final quarter of 2019 was revised downward to 2.5% in January 2020, to -4.9% in April and to -9.0% in May. The latest projection, from June, is -8.6%. Other factors, apart from the pandemic, include the slump in economic activity, the continuing increase in service cancellations and labour constraints (see table 11).

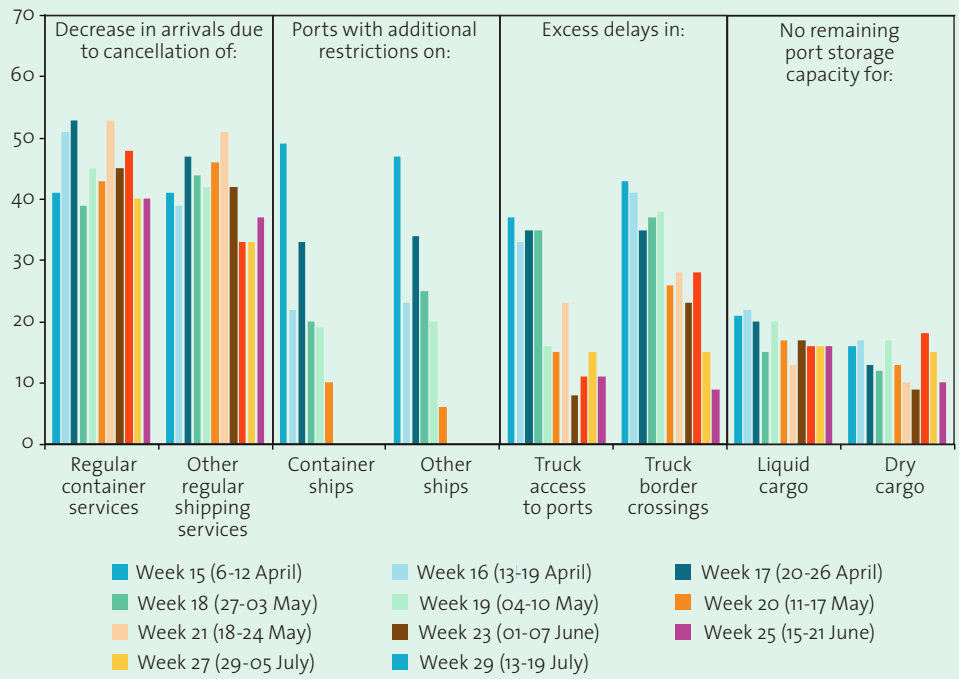
Table 11
Year-on-year growth estimates for worldwide container trade
(Percentages)

4Q 2019	January 2020	April 2020	May 2020	June 2020
3.6	2.5	-4.9	-9.0	-8.6

Source: Clarksons Research, *Container Intelligence Monthly*, vol. 21, No. 12, 2019, and vol. 22, Nos. 2, 3, 4 and 7, 2020.

Figure 3 illustrates the impacts felt around the world between the fifteenth week (06-12 April) and twenty-ninth week (13-19 July) of the year according to the COVID-19 Port Economic Impact Barometer published by the International Association of Ports and Harbours (IAPH)-World Ports Sustainability Programme (WPSP).

Figure 3
World: COVID-19 impacts on port operations and trade, by week
(Percentages)



Source: Prepared by the authors, on the basis of T. Notteboom and T. Pallis, *IAPH-WPS Port Economic Impact Barometer*, International Association of Ports and Harbours (IAPH)/World Ports Sustainability Programme (WPSP), 2020.

A number of countries have been placing restrictions on ports and harbours to curb the spread of COVID-19. At first, some Asian ports targeted shipping operations with the city of Wuhan but, as the contagion rapidly began to spread, the coverage and geographic scope of those restrictions have gradually been expanded. At this point in time, the restrictions generally include stricter inspections, a much closer working relationship between port and shipping organizations and national health authorities and the application of specific checks and quarantines on ships whose previous ports of call have included countries with high numbers of COVID-19 cases. Non-essential operations have been limited, and most countries have severely restricted the operations of cruise ships. In some cases, cruise ships have not been allowed to dock and have had to remain at sea.

Table 12 shows how operations in selected ports around the world in the first quarter of 2020 compare to those ports' operations in the first quarter of 2019. The ports included in the figure are the top 10 ports in the world in terms of throughput as of 2019.

Table 12
World: top 10 container ports in the first quarters of 2020 and 2019

Port/country	Change in growth rate 2020/2019 *(percentages)*
Shanghai, China	-10
Singapore	-4
Ningbo, China	-8
Shenzhen, China	-12
Guangzhou, China	-10
Busan, Republic of Korea	3
Qingdao, China	2
Hong Kong, Special Administrative Region of China	-6
Tianjin, China	-2
Rotterdam, Netherlands	-5

Source: Prepared by the authors, on the basis of figures from Dynamar, *DynaLiners Weekly*, 30/24, 21 July 2020.

The pandemic has hurt port operations in much of the region, with the most severe effects being felt in South America, Mexico and some strategic ports in the Caribbean. A comparison of container port activity in January-May 2020 with the corresponding period of 2019 in 27 ports and port areas in Latin America and the Caribbean representing nearly 80.2% of all port operations in the region indicates that activity in 16 of those ports (that account for 43.5% of the regional total) has diminished. The steepest downturns appear to have occurred in the principal ports of Chile, the Dominican Republic, Mexico and Peru.

The slowdown in port operations was quite widespread but some ports, especially in Panama, were exceptions, primarily because of changes in international trans-shipment operations. In all, 11 of the ports in the sample (accounting for 36.7% of the regional total) witnessed an increase in activity. Table 13 shows how activity levels have changed between January–May 2019 and January–May 2020 in selected ports.

Port operations are a vital factor in combating COVID-19. They play a critical role in ensuring that medical supplies, food, fuels and raw materials, along with manufactures and items that play a crucial role in preserving jobs, reach their intended destinations. Port operations, governance and communications are all therefore of key importance in keeping ports functioning properly and in keeping their staff employed.

Table 13
Throughput of selected ports in Latin America and the Caribbean in January–May 2019 and January–May 2020

	Ports and percentage of port activity in each country	Country	2019 share in regional total *(percentages)*	Variation in January–May 2020 *(percentages)*
Ports where activity has decreased			43.5	-9.7
Large decreases	Buenaventura (25%)	Colombia	2.1	-32.9
	Valparaíso (31%)	Chile	1.7	-28.0
	Lázaro Cárdenas (19%)	Mexico	2.4	-18.8
	Freeport (85%)	Bahamas	2.6	-16.6
	Caucedo (67%)	Dominican Republic	2.3	-15.0
	Altamira (13%)	Mexico	1.6	-14.9
	San Antonio (60%)	Chile	3.2	-10.2
	Veracruz (16%)	Mexico	2.1	-9.8
	Rio Grande (7%)	Brazil	1.4	-9.5
	Other Brazilian ports (28%)	Brazil	5.3	-7.0
	Callao (86%)	Peru	4.3	-5.9
	Manzanillo (42%)	Mexico	5.7	-3.8
Moderate decreases	Buenos Aires (84%)	Argentina	2.7	-1.5
	San Juan (100%)	Puerto Rico	2.8	-1.4
	Kingston (85%)	Jamaica	3.0	-1.1
	Point Lisas (48%)	Trinidad and Tobago	0.3	-0.4
Ports where activity has increased			**36.7**	**8.1**
	Montevideo (100%)	Uruguay	1.4	0.1
	Itajaí (12%)	Brazil	2.3	1.9
	Guayaquil (91%)	Ecuador	3.6	2.6
	Zárate (6%)	Argentina	0.3	3.2
	Santos (38%)	Brazil	7.2	7.1
	Itapoá (7%)	Brazil	1.4	8.1
	Paranagua (8%)	Brazil	1.6	9.3
	Rosario (3%)	Argentina	0.1	10.5
	Bahía de Cartagena (67%)	Colombia	5.4	11.7
	Panama-Caribbean (3 terminals) (60%)	Panama	8.1	14.0
	Panama-Pacific (2 terminals) (39%)	Panama	5.3	17.4
Total for selected ports			**80.2**	**-1.6**

Source: Prepared by the authors, on the basis of figures from the relevant port authorities and/or terminal, port or port area operators.
Note: These countries (total terminals and ports) account for 88.7% of total container port operations in Latin America and the Caribbean.

Finally, it is important for people to be aware of the fact that the crews of national and foreign fleets, shipping agents and other personnel, ship operators, maritime pilots, captains, drivers, inspectors, and officials and other staff of the various types of port facilities have been working tirelessly ever since the pandemic hit to make sure that supplies, food, resources and raw materials reach the countries where they are needed during the lockdown.

IV. Comments on the compilation of the information included in this issue

During the preparation of the statistical database used for this FAL Bulletin, it became apparent that there was a lack of homogeneity across information sources, that some of the data were partial, out-of-date or incomplete and that, in some cases, data were simply unavailable. Some countries have a single agency that consolidates the compilation, processing and publication of information, but others do not. There are also cases in which official agencies publish data on the terminals operating in government-run port terminals but not on privately operated terminals.

There is also a glaring lack of standardized definitions for terms used by ports when reporting on their operations. Widely used terms are defined very differently across countries and even from one port to the next in the same country. This makes it quite difficult to collect the necessary information, and a great deal of effort is therefore required to process it in a way that will provide comparable data for the region as a whole.

In addition, during the COVID-19 pandemic some sources have been reluctant to furnish information, particularly when the figures point to a deterioration in the situation.

For the compilation of the data used in the first part of this publication, a terminal was defined as a port facility encompassing one or more berths run by a single port operator. A distinction was drawn between different management systems and between terminals run by private parties or concession-holders and those run by the government. The former are single-operator terminals, while the latter are run by one or more operators and, in some cases, by the port authorities themselves.

V. Bibliography

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VI. Publications of interest

FAL Bulletin No. 372

Towards the decontamination of international maritime transport

Eliana Barleta
Ricardo Sánchez

This *FAL Bulletin* pursues two objectives. The first is to share information and a few reflections about the IMO 2020 Regulation. To that end, it provides an introduction to Annex VI of MARPOL and to the possible impacts, expectations, and uncertainties it poses for the maritime sector. Supplementing the information and reflections presented by the authors, it will also contain comments by the professionals and experts in the field who responded to the survey conducted by the authors to ascertain where Latin America and the Caribbean stands vis-à-vis these changes in the regulations. The second objective is to provide a brief introduction to the study being undertaken by the Infrastructure Services Unit (ISU) to estimate the CO_2 emissions from the international maritime transport of the countries of the region.

Available in: Spanish English

FAL Bulletin No. 373

Towards the decontamination of maritime transport in international trade: methodology and estimation of CO_2 emissions

Eliana Barleta
Silvana Sánchez

Following on from *FAL Bulletin* No. 372 concerning the new regulation on sulphur emissions from maritime transport, the aim of this document is to present the methodology for calculating CO_2 emissions generated by maritime transport in international trade. This methodology was used to obtain a preliminary estimate of emissions from a representative sample of exports from Latin America and the Caribbean. The sample was obtained from export tonnages from eight countries in 2017, and represents nearly 70% of total regional exports.

Available in: Spanish English