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FACILITATION OF TRANSPORT AND TRADE IN LATIN AMERICA AND THE CARIBBEAN

Port throughputs in Latin America and the Caribbean in 2009 and the first half of 2010

Introduction

Container port throughputs dropped by 10.5% worldwide in 2009 as compared with 2008, due mainly to decreased trade stemming from the global economic crisis. Latin America and the Caribbean were no exception; activity declined significantly at most of the region's ports. According to *Containerized Port Throughputs 2009-Latin America and Caribbean Countries*,¹ prepared by the Economic Commission for Latin America and the Caribbean (ECLAC) Infrastructure Services Unit, container throughput at the top 20 ports in the region was down a combined 6.8% compared with 2008, and the region as a whole posted a combined drop of 13.7%. However, available information on the first half of 2010 shows that, at least in the container sector, port activity is recovering.

I. Global containerized product throughput in 2009

Global containerized product throughput totalled 456 million twenty-foot equivalent units (TEUs) in 2009, down 10.5% from 2008. Container traffic was primarily concentrated in Asia, which accounts for 62% of worldwide traffic. Following Asia are Europe, at 15%, and North America (not including Mexico), at 8.4%. Table 1 shows that Latin America and the Caribbean moved nearly 32 million TEUs, the equivalent of 7% of the worldwide total and 13.7% less than in 2008.

This issue of the *FAL Bulletin* presents primary analytical data on port development in the region and analyses the impact of the economic crisis on port activity in Latin America in 2009.

It also provides preliminary data on container port throughput through June 2010, which point to recovering activity at most of the region's ports.

The authors are Gabriel Pérez Salas and Maricel Ulloa of the Infrastructure Services Unit at the ECLAC Natural Resources and Infrastructure Division. For further information, please contact Gabriel.Perez@CEPAL.org.



Introduction



I. Global containerized product throughput in 2009



II. Container port throughput in Latin America and the Caribbean in 2009



III. Latin America and the Caribbean: metric tons throughput at national ports



IV. Container port throughput in Latin America and the Caribbean in the first half of 2010



UNITED NATIONS

ECLAC

¹ A complete, updated ranking for 2009 is available online at www.eclac.org/rid.asp?id=38828.

Table 1
GLOBAL CONTAINER THROUGHPUT BY REGION, 2009

	TEUs (millions)	TEUs moved (as percentage of total)	Variation 2008-2009 (percentage)
Asia	285.03	62.44	-8.6
Europe	71.73	15.71	-19.0
North America	38.49	8.43	-15.3
Latin America and the Caribbean	31.95	7.00	-13.7
Africa	20.26	4.44	12.0
Oceania	9.02	1.98	-0.2
Total	456.48	100	-10.5

Source: Maricel Ulloa, with information from the ECLAC Maritime Profile and CI-ONLINE.

II. Container port throughput in Latin America and the Caribbean in 2009

Despite the drop in 2009, the 31.6 million TEUs that the region moved represent a 70% increase over 2003. Growth averaged 9.2% annually, even during the economic crisis. Table 2 shows the changes in activity at 100 container transfer ports for the period 2003-2009.

As Table 2 shows, and as has been discussed in previous bulletins, port activity is growing more concentrated.² In 2003, the region's top 10 ports accounted for 44.4% of

Table 2
CONTAINER PORT ACTIVITY IN LATIN AMERICA AND THE CARIBBEAN, 2003-2009

	2003	2004	2005	2006	2007	2008	2009 ^a	Average year-on-year variation 2003-2009 (percentage)
Total for 100 ports (millions of TEUs)	18.6	22.0	25.1	28.9	32.5	35.0	31.6	9.2
Top 10 ports (millions of TEUs)	8.2	10.0	11.8	13.9	15.9	17.1	15.3	10.8
Top 20 ports (millions of TEUs)	12.2	14.7	17.3	20.1	22.8	24.4	22.2	10.5
Top 10 ports as percentage of top 100 ports (percentage)	44.4	45.2	47.1	48.0	49.0	49.0	48.4	...
Top 20 as percentage of top 100 ports (percentage)	65.7	66.8	68.8	69.4	70.2	69.9	70.4	...

Source: Maricel Ulloa, with information from the ECLAC Maritime Profile.
^a Estimated.

total throughput, whereas in 2009 they accounted for 48.4%. Concentration at the top 20 ports rose from 65.7% of all activity in 2003 to more than 70% in 2009. And year-on-year growth for the top 10 and top 20 ports outpaced growth for the region as a whole.

Brazil, which moved more than 5.8 million TEUs, is highest in the country-by-country breakdown of total container throughput provided in table 3. Brazil is followed by

Table 3
LATIN AMERICA AND THE CARIBBEAN: NATIONAL PORT THROUGHPUT, 2009
(Thousands of TEUs)

	2009 rank	2003	2004	2005	2006	2007	2008	2009	Variation 2009-2003 (percentage)
Brazil	1	3 799.4	4 696.2	5 516.0	5 998.8	6 404.3	6 644.1	5 849.6	7.5
Panama	2	1 991.7	2 428.8	2 774.6	3 029.9	4 074.5	4 651.9	4 244.7	13.4
Mexico	3	1 685.2	1 903.7	2 133.2	2 676.5	3 062.2	3 314.9	2 884.4	9.4
Chile	4	1 461.6	1 707.4	1 976.5	2 326.6	2 745.9	3 137.9	2 797.3	11.4
Colombia	5	790.2	848.2	1 046.3	1 433.3	1 699.2	1 807.4	1 885.2	15.6
Jamaica	6	1 137.8	1 360.6	1 671.8	2 150.4	2 016.8	1 916.0	1 728.0	7.2
Argentina	7	954.9	1 219.6	1 336.7	1 665.9	1 822.0	1 931.7	1 540.2	8.3
Bahamas	8	1 057.9	1 184.8	1 211.5	1 463.0	1 632.0	1 702.0	1 323.0	3.8
Dominican Republic	9	480.7	537.3	577.7	597.6	912.5	1 138.5	1 263.5	17.5
Venezuela (Bolivarian Republic of)	10	597.7	921.2	1 067.6	1 266.8	1 331.7	1 325.5	1 247.4	13.0
Peru	11	626.8	806.9	991.5	1 084.8	1 174.5	1 392.3	1 193.5	11.3
Ecuador	12	625.8	665.5	748.1	813.7	894.3	979.6	1 000.9	8.1
Costa Rica	13	679.7	714.4	762.1	828.8	976.6	1 005.0	875.7	4.3
Guatemala	14	626.1	653.2	685.8	766.0	768.0	850.1	860.5	5.4
Uruguay	15	333.9	424.8	454.5	519.2	596.5	675.3	588.4	9.9
Honduras	16	469.3	555.5	553.0	593.7	636.4	669.8	571.8	3.3
Trinidad and Tobago	17	440.4	449.5	467.7	471.7	513.5	554.1	565.4	4.3
Cuba	18	216.6	259.3	317.1	375.9	319.9	319.0	319.0	6.7
Guadeloupe	19	108.1	106.2	154.3	154.4	168.8	170.7	142.7	4.7
El Salvador	20	65.6	92.9	103.5	123.3	144.5	156.3	115.2	9.8
Netherlands Antilles	21	81.2	82.1	89.2	90.8	97.3	102.1	97.9	3.2
Barbados	22	70.1	82.0	88.8	98.5	99.6	87.3	82.8	2.8
Nicaragua	23	10.9	15.7	18.0	46.1	46.6	62.6	5.0	32.4
Suriname	24	25.8	33.5	37.3	38.7	46.0	57.0	5.0	14.1
Saint Lucia	25	38.5	43.9	60.7	53.2	55.6	70.2	51.9	5.1
Aruba	26	51.9	53.5	57.1	54.7	47.3	49.3	49.3	-0.9
Cayman Islands	27	40.3	50.0	73.7	59.8	57.7	54.6	48.9	3.3
Guyana	28	33.4	33.4	33.4	39.3	39.1	39.0	39.0	2.6
Belize	29	33.8	35.6	36.4	37.5	39.2	38.2	31.3	-1.2
Antigua and Barbuda	30	21.7	22.8	26.1	30.8	34.1	32.6	29.2	5.0
Saint Vincent and the Grenadines	31	10.6	11.7	12.7	15.1	16.7	16.6	16.2	7.3
Paraguay	32	9.3	9.3	9.3	9.3	9.3	9.3	7.0	-4.6

Source: Gabriel Pérez Salas, Infrastructure Services Unit, ECLAC, 2010.

² Due to the impact of the crisis, this effect is best observed in years prior to 2009.

Panama, at more than 4.2 million TEUs, Mexico at 2.8 million TEUs and Chile at 2.7 million TEUs. The lowest throughput levels are at Caribbean ports that are not container transfer hubs.

The national statistics published here correspond to the sum total of all individual container movements at the ports included in the Maritime Profile. Thus, it is possible that total throughput is greater than reported here. We would appreciate receiving statistical information on your ports so as to keep our website (www.eclac.org/perfil) up

to date. Our website is a free source of information for the whole of Latin America and the Caribbean.

Nicaragua, at 32.4%, has the highest average annual growth rate for the period 2003-2009, followed by the Dominican Republic at 17.5%, Colombia at 15.6%, Suriname at 14.1%, Panama at 13.4%, the Bolivarian Republic of Venezuela at 13%, Chile at 11.4% and Peru at 11.3%. Table 4 shows activity at the top 100 container ports in Latin America and the Caribbean and the variation between 2008 and 2009.

Table 4
LATIN AMERICA AND THE CARIBBEAN: CONTAINER THROUGHPUT BY PORT, 2008-2009

2009 rank	Port	Country	2008 (TEUs)	2009 (TEUs)	Variation 2009-2008 (percentage)
1	Santos	Brazil	2 677 839	2 255 862	-15.8%
2	Colón (MIT, Evergreen, Panama Port)	Panama	2 468 520	2 210 720	-10.4%
3	Balboa	Panama	2 167 977	2 011 778	-7.2%
4	Kingston	Jamaica	1 915 951	1 728 042	-9.8%
5	Buenos Aires (not including Exolgan)	Argentina	1 781 100	1 412 462	-20.7%
6	Freeport	Bahamas	1 702 000	1 323 000	-22.3%
7	Cartagena (including SPR, El Bosque Contecar, ZP)	Colombia	1 064 105	1 237 873	16.3%
8	Manzanillo	Mexico	1 409 782	1 110 356	-21.2%
9	Callao	Peru	1 203 315	1 089 838	-9.4%
10	Caucedo	Dominican Republic	736 879	906 279	23.0%
11	Guayaquil	Ecuador	874 955	884 100	1.0%
12	Puerto Cabello	Venezuela (Bolivarian Republic of)	809 454	790 000 ^e	-2.4%
13	Limón-Moin	Costa Rica	835 143	748 029	-10.4%
14	San Antonio	Chile	687 864	729 033	6.0%
15	Valparaíso	Chile	946 921	677 432	-28.5%
16	Buenaventura (including SPR and ZP)	Colombia	743 295	647 323	-12.9%
17	Paranaguá	Brazil	595 729	630 597	5.9%
18	Rio Grande	Brazil	601 580	629 586	4.7%
19	Itajaí	Brazil	693 580	600 522	-13.4%
20	Lázaro Cárdenas	Mexico	524 791	591 467	12.7%
21	Montevideo	Uruguay	675 273	588 410	-12.9%
22	Veracruz	Mexico	716 046	564 315	-21.2%
23	Talcahuano/San Vicente	Chile	604 624	494 329	-18.2%
24	Puerto Cortés	Honduras	572 382	484 184	-15.4%
25	Port of Spain	Trinidad and Tobago	385 000	401 206	4.2%
26	Altamira	Mexico	436 234	400 968	-8.1%
27	La Guaira	Venezuela (Bolivarian Republic of)	436 911	378 318	-13.4%
28	Rio de Janeiro	Brazil	428 191	350 295	-18.2%
29	Santo Tomás de Castilla	Guatemala	322 519	329 946	2.3%
30	Havana	Cuba	319 000	...	...
31	Puerto Barrios	Guatemala	248 797	317 646	27.7%
32	Haina	Dominican Republic	283 229	277 971	-1.9%
33	Salvador	Brazil	263 722	244 204	-7.4%
34	Suape	Brazil	293 133	242 765	-17.2%
35	Iquique	Chile	334 326	226 062	-32.4%
36	Puerto Quetzal	Guatemala	278 798	212 941	-23.6%
37	Vitória	Brazil	271 786	209 096	-23.1%
38	Itaguaí/Sepeitaba	Brazil	282 007	206 667	-26.7%
39	Lirquen	Chile	231 397	206 541	-10.7%
40	São Francisco do Sul	Brazil	237 027	190 321	-19.7%
41	Point Lisas	Trinidad and Tobago	169 093	164 183	-2.9%
42	Jarry	Guadeloupe	170 729	142 692	-16.4%
43	Pecém	Brazil	144 416	137 487	-4.8%
44	Caldera	Costa Rica	169 827	127 658	-24.8%
45	Coronel	Chile	968	118 253	...
46	Puerto Angamos	Chile	97 226	117 924	21.3%



Table 4 (concluded)

2009 rank	Port	Country	2008 (TEUs)	2009 (TEUs)	Variation 2009-2008 (percentage)
47	Acajutla	El Salvador	156 323	115 165	-26.3%
48	Paita	Peru	138 993	114 216	-17.8%
49	Ensenada	Mexico	110 423	110 952	0.5%
50	Arica	Chile	116 720	109 572	-6.1%
51	Willemstad/Curaçao	Netherlands Antilles	102 082	97 913	-4.1%
52	Puerto Castilla	Honduras	97 420	87 572	-10.1%
53	Bridgetown	Barbados	87 255	82 832	-5.1%
54	Antofagasta	Chile	76 683	81 414	6.2%
55	Puerto Bolívar	Ecuador	48 101	68 530	42.5%
56	Nieuwe Haven	Suriname	57 000	...	...
57	Corinto	Nicaragua	58 879	55 742	-5.3%
58	Progreso	Mexico	66 477	53 517	-19.5%
59	Fortaleza	Brazil	53 121	50 726	-4.5%
60	Oranjestad	Aruba	49 300	...	...
61	Georgetown-Cayman	Cayman Islands	54 584	48 900	-10.4%
62	Esmeraldas	Ecuador	54 885	44 341	-19.2%
63	Belém	Brazil	42 538	43 572	2.4%
64	Guanta	Venezuela (Bolivarian Republic of)	41 700	...	...
65	Ushuaia	Argentina	58 869	39 593	-32.7%
66	Rosario (including G.Lagos, P.Alv., A.Seco, V.G.Galvez)	Argentina	42 151	39 138	-7.1%
67	Dégrad-des-Cannes	French Guiana	39 000	...	...
68	Maracaibo	Venezuela (Bolivarian Republic of)	37 400	...	...
69	Puerto Plata	Dominican Republic	43 622	33 029	-24.3%
70	Belize City	Belize	38 211	31 344	-18.0%
71	Castries	Saint Lucia	35 977	30 186	-16.1%
72	Mazatlán	Mexico	27 668	29 322	6.0%
73	St. John	Antigua and Barbuda	32 562	29 150	-10.5%
74	Bahía Blanca (including Muelle Andoni Irazusta)	Argentina	25 523	28 558	11.9%
75	Vila do Conde	Brazil	23 815	27 691	16.3%
76	Santo Domingo (ITTS)	Dominican Republic	46 041	23 799	-48.3%
77	Punta Arenas (Empresa Portuaria Austral)	Chile	27 008	22 636	-16.2%
78	Vieux Fort	Saint Lucia	34 225	21 756	-36.4%
79	Almirante	Panama	9 846	20 696	110.2%
80	Madryn	Argentina	24 011	20 453	-14.8%
81	Matarani	Peru	19 824	19 584	-1.2%
82	Kingstown (Including CPCP)	Saint Vincent and the Grenadines	16 570	16 238	-2.0%
83	Natal	Brazil	17 186	15 046	-12.5%
84	Salina Cruz	Mexico	4 714	13 111	178.1%
85	Boca Chica	Dominican Republic	19 909	10 985	-44.8%
86	Manzanillo-DO	Dominican Republic	8 190	10 880	32.8%
87	Ilo	Peru	34 860	9 655	-72.3%
88	Chacabuco	Chile	11 655	9 466	-18.8%
89	Maceió	Brazil	8 430	7 302	-13.4%
90	Asunción	Paraguay	9 317	7 045	-24.4%
91	Chimbote	Peru	2 004	6 760	237.3%
92	Tampico	Mexico	11 152	5 936	-46.8%
93	Santarém	Brazil	4 709	4 716	0.1%
94	Coquimbo	Chile	2 462	4 674	89.8%
95	Puerto Morelos	Mexico	7 586	4 443	-41.4%
96	Manta	Ecuador	1 642	3 924	139.0%
97	Arlen Siu/El Rama	Nicaragua	3 706	3 293	-11.1%
98	Itaqui	Brazil	5 310	3 177	-40.2%
99	Salaverry	Peru	13 112	2 043	-84.4%
100	Chiriquí Grande Terminal	Panama	5 582	1 532	-72.6%

Source: Gabriel Pérez Salas, Infrastructure Services Unit, ECLAC, 2010.

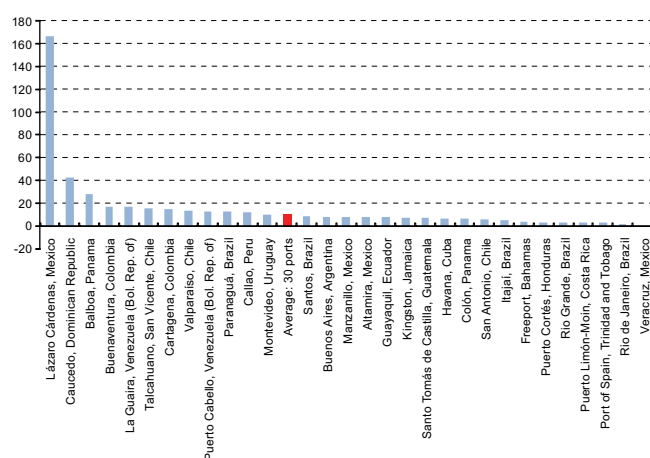
Note: This ranking is based on information that is either public or provided to ECLAC by the ports and national organizations themselves. To update information, please e-mail gabriel.perez@cepal.org.

^a Estimated.

... Not available.

The Latin American and Caribbean region has nine ports that moved more than 1 million TEUs in 2009. These ports are Santos (Brazil), Colón (all of the terminals at the Atlantic entrance to the Panama Canal), Buenos Aires (Argentina), Freeport (Bahamas), Cartagena (Colombia), Manzanillo (Mexico) and Callao (Peru). The year-on-year variation is shown in the figure below.

Figure 1
AVERAGE ANNUAL GROWTH AT THE TOP 30 PORTS IN LATIN AMERICA AND THE CARIBBEAN, 2003-2009
 (Percentages)



Source: Maritime Profile Infrastructure Services Unit, ECLAC.

Latin America and the Caribbean: metric tons throughput at national ports

According to preliminary data on 2009 port throughput in metric tons gathered directly by the ECLAC Infrastructure Services Unit from governmental sources and the ports themselves, Brazil was, again, in the lead. In total, it moved more than 730 million metric tons, including imports, exports, cabotage and transit. Following Brazil are Mexico, with approximately 500 million metric tons, and the Bolivarian Republic of Venezuela and Argentina, with slightly more than 100 million metric tons. As table 5 shows, the remaining countries do not exceed 1 million metric tons.

Average annual growth in metric tons in the period 2003-2009 was uneven. Peru and the Netherlands Antilles posted the highest growth, at 45.7% and 20.7%, respectively, while the steepest declines in total tons moved were in the Caribbean.

Throughput is broken down by port in table 6. Brazil is at the top of the list, with Tubarão moving more than 87 million tons (16.1% less than in 2008). A few minor exceptions aside, this trend held at all ports on which throughput data were accessible.

Table 5
PORT THROUGHPUT IN LATIN AMERICA AND THE CARIBBEAN, 2003-2009
 (Thousands of metric tons)

2009 rank	Country	2003	2004	2005	2006	2007	2008	2009	Variation 2009-2003 (percentage)
1	Brazil	570 790.1	620 720.5	649 418.8	682 833.5	754 716.7	768 323.6	732 931.1	4.3
2	Mexico	264 736.1	266 007.8	283 604.2	287 431.7	272 934.4	265 237.2	241 923.1	-1.5
3	Venezuela (Bolivarian Republic of)	...	...	...	...	262 000.0	236 520.6	232 000.0	-2.0
4	Argentina	141 051.6	145 664.8	152 920.7	152 613.8	169 284.0	168 813.5	155 472.2	1.6
5	Colombia	79 757.4	91 570.1	97 150.8	102 610.4	112 455.7	122 191.8	120 943.0	7.2
6	Chile	58 799.0	66 053.0	71 104.0	75 746.0	83 635.0	84 845.0	79 154.0	5.1
7	Panama	25 806.3	36 067.1	37 873.8	40 447.9	45 834.5	49 274.9	56 436.2	13.9
8	Ecuador	29 641.8	37 353.5	36 890.0	39 940.5	40 630.6	41 176.2	38 924.3	4.6
9	Jamaica	27 686.0	27 686.0	27 686.0	31 710.6	31 423.0	30 303.3	24 985.6	-1.7
10	Peru	16 271.4	17 066.5	18 124.3	19 080.3	20 791.8	27 281.1	24 967.4	45.7
11	Dominican Republic	16 614.9	17 240.8	18 183.8	19 001.0	21 122.4	23 277.3	22 680.5	5.3
12	Guatemala	14 640.0	14 765.1	15 755.2	15 888.9	16 877.5	15 859.6	16 014.6	1.5
13	Costa Rica	10 362.3	10 794.0	11 114.2	12 706.1	13 643.8	13 906.9	12 430.3	3.1
14	Honduras	7 658.2	8 731.8	9 273.3	9 392.8	9 819.2	10 475.8	9 450.5	3.6
15	Uruguay	6 443.2	7 671.5	8 415.5	9 997.6	10 253.0	10 576.2	9 250.1	6.2
16	El Salvador	4 698.0	4 685.8	5 098.4	5 965.3	5 963.8	5 856.5	4 830.2	0.5
17	Guadeloupe	2 871.4	2 741.5	2 973.2	3 136.7	3 436.0	3 582.1	3 010.7	0.8
18	Nicaragua	2 149.4	2 328.1	2 505.1	2 706.6	2 938.3	2 799.3	1 948.0	-1.6
19	Barbados	1 003.5	1 189.5	1 202.3	1 308.3	1 314.7	...	1 063.8	1.0
20	Netherlands Antilles	807.6	808.6	895.4	914.8	984.9	1 028.8	966.1	20.7
21	Antigua and Barbuda	542.6	658.1	55.6	694.9	801.7	839.1	737.2	5.2
22	Belize	737.5	703.2	701.7	675.5	722.8	658.6	603.5	-47.1
23	Saint Lucia	601.6	684.7	726.3	743.8	792.7	673.8	580.4	-0.6
24	Saint Vincent and the Grenadines	312.2	312.2	342.7	392.4	396.7	263.1	204.5	-69.7
25	Cayman Islands	423.5	412.3	676.7	855.1	763.8	668.3	42.7	-31.8

Source: Gabriel Pérez Salas, with information from the ECLAC Maritime Profile, 2010.

Note: This ranking is based on port information recorded in the ECLAC Maritime Profile, so information on national totals reported by other sources may vary slightly.

Table 6
TOTAL THROUGHPUT IN TONS AT LATIN AMERICAN AND CARIBBEAN PORTS, 2008-2009

2009 rank	Port	Country	2008 (tons)	2009 (tons)	Variation 2009-2008 (percentage)
1	Tubarão	Brazil	99 873 293	83 834 676	-16.1
2	Santos	Brazil	83 316 187	75 641 825	-9.2
3	Cayo Arcas	Mexico	61 011 040	51 777 328	-15.1
4	Itaguaí/SePETiba	Brazil	84 888 332	49 755 062	-41.4
5	Almirante Barroso	Brazil	49 515 291	49 515 291	0.0
6	São Sebastião	Brazil	48 379 126	...	...
7	Santa Marta (including SPR and ZP)	Colombia	37 341 268	34 917 934	-6.5
8	Paranaguá	Brazil	34 018 216	31 274 077	-8.1
9	San Lorenzo/San Martín	Argentina	43 069 827	30 498 787	-29.2
10	Angra dos Reis	Brazil	30 424 732	...	...
11	La Guajira	Colombia	32 402 295	29 824 851	-8.0
12	Coatzacoalcos	Mexico	25 187 967	26 168 001	3.9
13	Rosario (including G.Lagos, P.Alv., A.Seco, V.G.Galvez)	Argentina	23 265 683	...	...
14	Buenos Aires (not including Exolgan)	Argentina	28 081 574	22 593 172	-19.5
15	Balao	Ecuador	22 340 139	20 832 270	-6.7
16	Lázaro Cárdenas	Mexico	19 795 109	19 950 479	0.8
17	Golfo Morrosquillo (including SPR and ZP)	Colombia	14 446 029	19 208 514	33.0
18	Cartagena (including SPR, El Bosque, Contecar, ZP)	Colombia	20 000 703	19 151 374	-4.2
19	Ponta Ubu	Brazil	17 660 461	19 084 850	8.1
20	Manzanillo	Mexico	22 284 026	18 621 933	-16.4
21	Callao	Peru	19 049 523	17 383 347	-8.7
22	Colón (MIT, Evergreen, Panama Port)	Panama	18 224 572	16 889 843	-7.3
23	São Francisco do Sul	Brazil	16 986 781	16 590 006	-2.3
24	Vila do Conde	Brazil	20 471 752	16 318 534	-20.3
25	Veracruz	Mexico	16 852 822	16 154 756	-4.1
26	Balboa	Panama	15 725 610	15 524 998	-1.3
27	Praia Mole	Brazil	20 505 162	15 251 584	-25.6
28	Rio Grande	Brazil	24 552 216	14 855 525	-39.5
29	Charco Azul	Panama	6 353 126	14 141 962	122.6
30	Porto Alegre	Brazil	13 651 624	...	..
31	Salina Cruz	Mexico	12 504 866	13 427 335	7.4
32	Guayaquil	Ecuador	12 488 647	12 377 595	-0.9
33	San Antonio	Chile	13 200 362	12 109 977	-8.3
34	Isla Cedros	Mexico	14 107 152	11 804 724	-16.3
35	Quintero	Chile	10 237 633	11 708 901	14.4
36	Itaquí	Brazil	105 186 939	11 689 425	-88.9
37	Altamira	Mexico	13 414 632	11 496 516	-14.3
38	Buenaventura (including SPR and ZP)	Colombia	10 695 371	11 333 547	6.0
39	Bahía Blanca (including Muelle Andoni Irazusta)	Argentina	12 676 308	10 094 712	-20.4
40	Caleta Cordoba	Argentina	9 739 364	...	...
41	Tuxpan	Mexico	9 508 730	9 608 291	1.0
42	Rosales	Argentina	11 349 998	9 528 829	-16.0
43	Limón-Moin	Costa Rica	10 104 173	8 965 761	-11.3
44	Tampico	Mexico	8 830 598	8 498 049	-3.8
45	Punta Venado	Mexico	10 218 573	8 215 676	-19.6
46	Haina	Dominican Republic	9 814 027	8 177 238	-16.7
47	Valparaíso	Chile	10 898 860	7 984 410	-26.7
48	Barra do Riacho	Brazil	7 602 932	...	...
49	Montevideo	Uruguay	9 088 978	7 596 044	-16.4
50	Suape	Brazil	8 655 042	7 520 799	-13.1
51	Caucedo	Dominican Republic	6 802 305	7 474 103	9.9
52	Puerto Cortés	Honduras	8 527 276	7 366 269	-13.6
53	Dos Bocas	Mexico	9 619 265	7 251 195	-24.6
54	Rio de Janeiro	Brazil	19 803 582	6 769 028	-65.8
55	Puerto Quetzal	Guatemala	6 979 370	6 718 880	-3.7
56	San Nicolás	Argentina	6 456 528	...	...
57	Talcahuano/San Vicente	Chile	7 297 812	6 076 831	-16.7
58	Guerrero Negro	Mexico	7 331 765	5 989 610	-18.3
59	Manaus	Brazil	16 265 750	5 736 679	-64.7
60	Caleta Olivia	Argentina	5 423 269	...	...
61	Barranquilla (including SPR and ZP)	Colombia	6 262 240	5 284 558	-15.6
62	Aratu	Brazil	31 601 037	5 261 077	-83.4
63	Campana	Argentina	5 031 202	...	...
64	Topolobampo	Mexico	4 779 404	4 812 292	0.7
65	Vitória	Brazil	7 222 270	4 768 782	-34.0
66	Lirquen	Chile	5 382 934	4 642 987	-13.7

Table 6 (concluded)

2009 rank	Port	Country	2008 (tons)	2009 (tons)	Variation 2009-2008 (percentage)
67	Patillos	Chile	4 014 246	4 608 345	14.8
68	Cristóbal	Panama	3 665 058	4 477 787	22.2
69	Santo Tomás de Castilla	Guatemala	4 676 801	4 368 440	-6.6
70	Corumbá/Ladário	Brazil	4 294 873	...	...
71	La Plata	Argentina	5 066 183	4 244 040	-16.2
72	Guaymas	Mexico	4 049 372	3 822 563	-5.6
73	Sergipe	Brazil	3 786 187	...	...
74	Zarate (including D.Dock, Vítco, TLP)	Argentina	3 681 845	...	...
75	Ventanas	Chile	4 651 564	3 618 266	-22.2
76	Areia Branca	Brazil	3 745 876	3 594 410	-4.0
77	Progreso	Mexico	4 523 223	3 572 123	-21.0
78	Fortaleza	Brazil	3 755 512	3 496 112	-6.9
79	Caldera	Costa Rica	3 464 534	...	...
80	Acajutla	El Salvador	4 435 557	3 383 419	-23.7
81	Mazatlán	Mexico	3 370 294	3 269 455	-3.0
82	Natal	Brazil	3 232 143	...	...
83	Tocopilla	Chile	2 855 361	3 190 083	11.7
84	Chiriquí Grande Terminal	Panama	2 619 718	3 159 194	20.6
85	Salvador	Brazil	5 837 259	3 154 270	-46.0
86	Quequen	Argentina	4 528 516	3 083 032	-31.9
87	Jarry	Guadeloupe	3 582 054	3 010 669	-16.0
88	Mejillones	Chile	5 323 386	2 921 748	-45.1
89	Belém	Brazil	21 454 312	2 879 901	-86.6
90	Patache	Chile	1 380 566	2 871 693	108.0
91	Maceió	Brazil	4 779 581	2 780 328	-41.8
92	Matarani	Peru	2 897 274	2 740 051	-5.4
93	Puerto Barrios	Guatemala	2 085 102	2 512 110	20.5
94	Rosarito Terminal	Mexico	2 651 769	2 480 114	-6.5
95	Boyas San José	Guatemala	2 118 345	2 415 140	14.0

Source: Gabriel Pérez Salas, Infrastructure Services Unit, ECLAC, 2010.

Note: This ranking is based on information that is either public or provided to ECLAC by the ports and national organizations themselves. To update information, please e-mail gabriel.perez@cepal.org.

IV. Container port throughput in Latin America and the Caribbean in the first half of 2010

In 2010 for the first time, the Infrastructure Services Unit has prepared a port throughputs ranking for the first half of the year, making it possible to better monitor the effects of the crisis on Latin American port activity. Overall, traffic has recovered significantly at most of the ports, with growth rates approaching pre-crisis levels. According to our study, the top 20 container ports in Latin America and the Caribbean posted 18.2% growth over the first half of 2009, and 9.6% compared with the first half of 2008 (just before the onset of the crisis).

Despite this growth, the fact that not all of the region's ports are recovering at the same rate is cause for concern. In some cases, the rally is not strong enough to return to 2008 levels. However, the decline is not entirely due to the lingering effects of the crisis, but, rather, to port capacity management problems. Many major Latin American ports are seeing increased congestion and face inland connectivity issues as well, driving logistical costs up and leading to loss of clients as the latter redirect their cargo to other national ports or to ports in neighbouring countries that can provide better service. National and port authorities should therefore be urged to effectively address these logistical issues. Not only do they affect port development,

but they also seriously threaten the competitiveness and development of the entire national economy.

Throughout the first six months of 2010, Panamanian ports led in container throughput in Latin America and the Caribbean. At the head is the port cluster in the Colón area, followed by Balboa—both in Panama. Table 7 shows data from 80 ports in Latin America and the Caribbean.³ ECLAC gathered the data directly from port authorities and official national information. An examination of the data confirms that overall port activity is recovering as the economy expands. The decline at some ports can be attributed to extreme weather events and natural disasters that destroyed existing port infrastructure or disrupted normal operations at port terminals. Examples are some southern Chilean ports after the February 2010 earthquake and parts of Central America affected by flooding or the congestion mentioned earlier. The ports of Itajaí (Brazil), Callao (Peru), Manzanillo (Mexico) and Guayaquil (Ecuador) made notable progress, increasing their market share during this period and drawing cargo away from neighbouring ports, as did Cartagena (Colombia) and Lázaro Cárdenas (Mexico), where activity was up sharply even in the midst of the crisis.

³ A complete, updated version of our container port throughput ranking in Latin America and the Caribbean for the first half of 2010 is available online at www.cepal.org/is.asp?id=41089.

Table 7
CONTAINER THROUGHPUT AT MAJOR PORTS IN LATIN AMERICA AND THE CARIBBEAN, FIRST HALVES OF 2009 AND 2010

First half 2010 rank	2009 rank	Port	Country	First half 2009 (TEUs)	First half 2010 (TEUs)	Variation 2010/2009 (percentage)
1	2	Colón (MIT, Evergreen, Panama Port)	Panama	1 127 553	1 256 887	11.5
2	3	Balboa	Panama	904 953	1 209 312	33.6
3	1	Santos	Brazil	1 030 855	1 206 532	17.0
4	4	Kingston	Jamaica	847 184	718 886	-15.1
5	7	Cartagena (including SPR, El Bosque, Contecar)	Colombia	633 723	699 972	10.5
6	8	Manzanillo	Mexico	482 036	669 500	38.9
7	6	Freeport	Bahamas	600 000	...	...
8	9	Callao	Peru	505 909	581 121	14.9
9	5	Buenos Aires (not including Exolgan)	Argentina	415 900	514 500	23.7
10	11	Guayaquil	Ecuador	283 646	491 579	73.3
11	13	Puerto Limón-Moin	Costa Rica	382 840	467 527	22.1
12	10	Caucedo	Dominican Republic	450 000	...	...
13	15	Valparaíso	Chile	375 218	442 474	17.9
14	14	San Antonio	Chile	373 505	441 550	18.2
15	19	Itajaí	Brazil	238 297	423 759	77.8
16	12	Puerto Cabello	Venezuela (Bolivarian Republic of)	391 102	...	...
17	21	Lázaro Cárdenas	Mexico	263 469	355 519	34.9
18	17	Paranaguá	Brazil	295 678	334 700	13.2
19	18	Rio Grande	Brazil	293 946	315 290	7.3
20	22	Veracruz	Mexico	262 956	312 340	18.8
21	20	Montevideo	Uruguay	304 118	306 441	0.8
22	16	Buenaventura	Colombia	297 311	294 322	-1.0
23	24	Puerto Cortés	Honduras	250 709	284 371	13.4
24	25	Altamira	Mexico	177 773	232 218	30.6
25	28	Santo Tomás de Castilla	Guatemala	161 252	200 141	24.1
26	23	Talcahuano/San Vicente	Chile	300 547	177 723	-40.9
27	29	Puerto Barrios	Guatemala	143 491	167 206	16.5
28	26	La Guaira	Venezuela (Bolivarian Republic of)	213 121	147 004	-31.0
29	32	Suape	Brazil	102 203	135 121	32.2
30	33	Iquique	Chile	104 632	129 064	23.4
31	34	Puerto Quetzal	Guatemala	101 760	123 123	21.0
32	31	Salvador	Brazil	110 636	107 306	-3.0
33	37	Lirquen	Chile	110 891	90 783	-18.1
34	35	Vitória	Brazil	94 506	73 502	-22.2
35	41	Caldera	Costa Rica	60 828	73 478	20.8
36	44	Acajutla	El Salvador	62 288	69 611	11.8
37	45	Ensenada	Mexico	39 408	68 372	73.5
38	49	Paíta	Peru	57 424	68 181	18.7
39	43	Puerto Angamos	Chile	58 231	63 151	8.4
40	42	Coronel	Chile	14 584	61 276	...
41	46	Arica	Chile	52 037	57 071	9.7
42	38	São Francisco do Sul	Brazil	122 142	53 121	-56.5
43	47	Willemstad/Curaçao	Netherlands Antilles	...	43 928	...
44	48	Puerto Castilla	Honduras	49 098	42 302	-13.8
45	50	Bridgetown	Barbados	40 643	36 895	-9.2
46		Zarate	Argentina	22 686	35 168	55.0
47	52	Puerto Bolívar	Ecuador	...	34 178	...
48	53	Corinto	Nicaragua	23 652	27 585	16.6
49	54	Progreso	Mexico	28 732	26 792	-6.8
50	60	Ushuaia	Argentina	18 766	25 160	34.1
51	55	Fortaleza	Brazil	21 860	25 120	14.9
52	57	Esmeraldas	Ecuador	...	24 733	...
53	56	Georgetown-Cayman	Cayman Islands	26 601	23 644	-11.1
54	59	Rosario	Argentina	20 130	21 797	8.3
55	58	Belém	Brazil	14 024	20 631	47.1
56	66	Vila do Conde	Brazil	10 692	14 045	31.4
57	98	Imbituba	Brazil	8 559	11 388	33.1
58	71	Madryn	Argentina	10 837	11 206	3.4
59	63	Mazatlán	Mexico	12 796	11 047	-13.7
60	70	Almirante	Panama	6 928	9 408	35.8
61	65	Bahia Blanca (including Muelle Andoni Irazusta)	Argentina	22 932	9 276	-59.5
62	72	Natal	Brazil	1 633	7 737	...
63	80	Chimbote	Peru	2 826	5 008	77.2
64	78	Maceió	Brazil	3 489	4 124	18.2

Table 7 (concluded)

First half 2010 rank	2009 rank	Port	Country	First half 2009 (TEUs)	First half 2010 (TEUs)	Variation 2010/2009 (percentage)
65	82	Santarém	Brazil	2 355	3 599	52.8
66	76	Ilo	Peru	6 443	3 393	-47.3
67	84	Morelos	Mexico	2 601	2 372	-8.8
68	64	St. John	Antigua and Barbuda	2 227	2 357	5.8
69	73	Salina Cruz	Mexico	3 779	2 350	-37.8
70	81	Tampico	Mexico	2 088	2 045	-2.1
71	85	Chacabuco	Chile	...	1 947	...
72	87	Manta	Ecuador	...	1 412	...
73	86	Arlen Siu/El Rama	Nicaragua	1 519	1 401	-7.8
74	62	Castries	Saint Lucia	1 189	1 225	3.0
75	90	El Bluff	Nicaragua	190	96	-49.5
76	97	San Martín	Peru	10	58	...
77	94	Iquitos	Peru	50	55	10.0
78	92	Yurimaguas	Peru	34	54	58.8
79	89	Chiriquí Grande Terminal	Panama	1 378	...	...
80	88	Salaverry	Peru	1 789	...	...

Source: Gabriel Pérez Salas, Infrastructure Services Unit, ECLAC, 2010.

Note: The ranking is based on information that is either public or provided to ECLAC by the ports and national organizations themselves. To update information, please e-mail gabriel.perez@cepal.org.

... Not available.