Original: **Spanish**

www.cepal.org/transporte

number 2 / 2021 / ISSN: 1564-4243

FAL

BULLETIN 386

FACILITATION OF TRANSPORT AND TRADE IN LATIN AMERICA AND THE CARIBBEAN

2020 Port Report: the impact of the coronavirus disease (COVID-19) pandemic on the shipping trade, trans-shipment and throughput of container ports in Latin America and the Caribbean

Background

The ECLAC Infrastructure Services Unit has a long history of publications on maritime and port issues, such as the Maritime and Logistics Profile of Latin America →

This *Bulletin* on the Facilitation of Trade and Transport in Latin America and the Caribbean (*FAL Bulletin*) outlines how activity in container terminals and ports in Latin America and the Caribbean has changed in 2020 compared to 2019, with a view to analysing the effects of the COVID-19 pandemic on international shipping trade in the region.

The pandemic had such an enormous impact in 2020 that the changes in classification are out of the ordinary, owing to the entirely unprecedented situation. Consequently, caution is advised when drawing conclusions about changes in position.

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and the Caribbean,[1] an interactive tool with data and information for Latin America and the Caribbean on port activity, the proportion of each mode in international transport, and data on infrastructure endowment and performance (ECLAC, 2020a). Traditionally, the throughput of the region's container ports has been published on the Maritime and Logistics Profile page. However, since 2019 more information has been collected, including additional trans-shipment, export and import data, to provide a regional database, primarily to analyse regional port activity in greater depth and to be used in studies of the regional maritime, port and logistics sector.

This *FAL Bulletin* provides shipping trade (exports and imports), trans-shipment and throughput data. The data are presented as cumulative monthly, quarterly or annual figures for 2020 compared to 2019, depending on the availability of data for each terminal or port, in order to analyse the effects of the COVID-19 pandemic on regional port activity over the year.

The analysis is based on data from 28 Latin American and Caribbean countries and territories, and a total of 102 terminals and ports in the region. The first section of the document analyses the effects of the COVID-19 pandemic on container ports in the different regions of the world, and the examines the subregions of Latin America and the Caribbean in more detail. The second part of the document provides a classification of trade and throughput by terminal or port and by country.

I. The scope, magnitude and duration of the impact of the COVID-19 pandemic globally and in Latin America and the Caribbean

Much has already been said about the abrupt changes the COVID-19 pandemic has caused around the world and in all areas of human life. The logistics and economic sectors have suffered almost unprecedented major impacts. As described by ECLAC (2020b), there are several differences between the crisis caused by COVID-19 and previous ones. Specifically, there are at least four key differences:

(i) Pre-existing adverse conditions: the ongoing crisis erupted in a context of a weakening of global trade that had been dragging on for more than a decade; to put this in figures, the volume of trade in goods expanded at an average annual rate of 6.2% from 1990 to 2007, but growth from 2012 to 2019 averaged just 2.3% per year. In Latin America and the Caribbean, and in other regions, the economic effects of the 2008–2009 crisis never completely disappeared. Therefore, COVID-19 hit harder because it came at a time of relative weakness.

[1] See [online] http://perfil.cepal.org/l/en/start.html.

(ii) The extent of the effects: the crisis is global, affecting 90% of the world's economies, whereas previous crises were more "regional".

(iii) The speed of the impact: the 2008–2009 crisis began in mid-2008 and its worst effects came many months later, while the 2020 crisis was hitting hard two to three months after it began.

(iv) Intensity: the effects on economic growth and trade are almost unprecedented; the World Bank (2020) has stated that, for the world, this is the largest decline in international trade since the Second World War, and for Latin America it is the largest relative downturn in GDP since 1901. ECLAC (2020b) estimates regional GDP contracted by around 9.1% in 2020.

Total international trade by water transport reached an all-time high of 11.945 billion tonnes in 2019, but fell to 11.494 billion tonnes in 2020, a year-on-year drop of -3.8% (Clarksons, 2021).[2] Global container trade, measured in twenty-foot equivalent units (TEUs), was already showing year-on-year declines at the start of 2020, compared to 2019. In May 2020 the year-on-year fall became more severe, reaching 11.4%. By July 2020 volumes were almost identical to the same period of 2019, with a year-on-year variation of -0.1%, and by August year-on-year rises had appeared, lasting through to December. The cumulative global change for January to December 2020 compared to 2019 was -0.9%.

In Latin America, figures for March 2020 were 0.7% lower than the same month of 2019, followed by sharp drops of 15.8% in April 2020, 16.8% in May and 16.1% in June. In October there was a return to year-on-year growth, but not enough to revisit the levels of 2019. For the full year there was a year-on-year fall of 2.9% compared to 2019.

Table 1 shows the change in container trade from January to December 2020 compared to the same periods of 2019 in Latin America and the world.

Table 1
Latin America and the world: year-on-year variation in container trade, January to December 2020, compared with 2019
(On the basis of TEUs, in percentages)

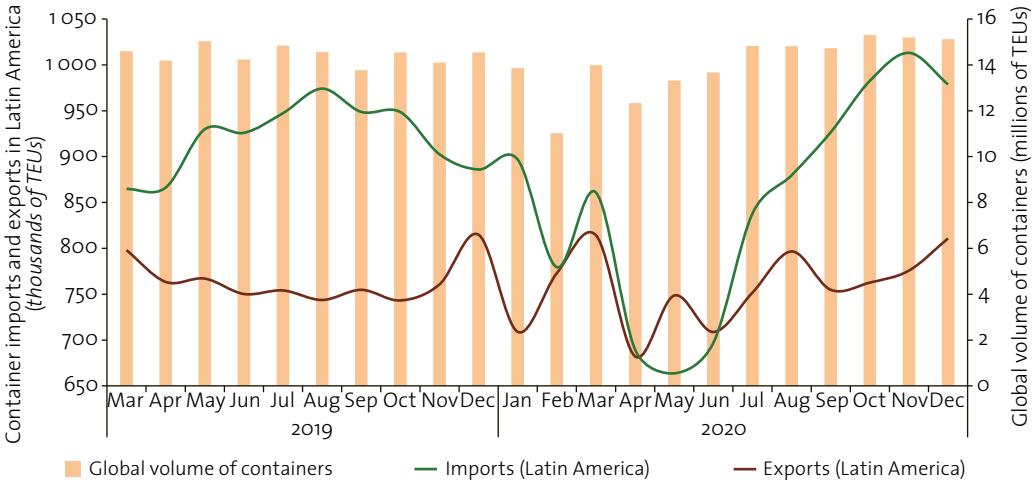
	January	February	March	April	May	June	July	August	September	October	November	December	Cumulative January-december
Latin América		5.2	0.7	-15.8	-16.8	-16.1	-6.6	-2.4	-1.3	3.2	7.6	5.2	-2.9
World	1.8	-6.0	-4.2	-13.1	-11.4	-3.9	-0.1	1.7	6.9	5.3	7.8	4.0	-0.9

Source: Prepared by the authors, on the basis of information provided by Container Trades Statistics (CTS), 2021.

In Latin America, where the volume of containerized imports has historically been greater than that of exports, the fact that the pandemic has had a greater effect on the former led to some convergence of these two variables. Thus, containerized exports from the subregion topped imports for most of the period from February to June 2020. From July onward, imports again considerably exceeded exports, as shown in figure 1.

[2] This includes the following types of cargo: iron, coal, dry bulk, gas and oil and derivatives, chemicals, containers and other minor cargo.

Figure 1
South and Central America: container imports and exports and global container volume, March 2019 to December 2020
(Thousands of TEUs and millions of TEUs)



Source: Prepared by the authors, on the basis of information provided by Container Trades Statistics (CTS), 2021.

The pandemic had an enormous impact on exports and imports between regions between January and December 2020. According to the information provided by Container Trades Statistics (CTS), on 42 of the 49 trade routes analysed, volumes were lower than in the previous year. Table 2 shows the variations in intraregional trade, with significant drops in domestic trade in Latin America.

Table 2
Selected regions: intraregional exports and imports, January to December, year-on-year variation from 2019 to 2020
(On the basis of TEUs, in percentages)

		Exporting region							
	January to December	Far East	Europe	North America	Australasia	Middle East and India	Sub-saharan Africa	Latin America	Total imports
Importing region	Far East	-0.8	0.3	-1.3	-4.5	10.8	1.7	2.5	-0.2
	Europe	-5.4	0.8	-12.1	-6.7	-5.2	-0.8	3.6	-3.9
	North America	7.3	-2.3	-10	-6.6	1.3	1.9	1.6	4.5
	Australasia	6.4	-3.4	-7.1	1.3	4.3	-7.7	12.1	3.1
	Middle East and India	-8.4	-6.5	-14.8	-10.2	0.8	-5.2	4.3	-6.2
	Sub-Saharan Africa	-2.7	-5.6	-7.4	-8.1	0.8	2.1	10.5	-2.5
	Latin America	0.3	-6.0	-11	-9.7	-0.2	-17	-14.2	-6.3
	Total exports	-0.4	-1.8	-6.9	-4.6	1.7	-0.5	-0.5	-1.2

Source: Prepared by the authors, on the basis of information provided by DynaLiners, 2021, with data from Container Trades Statistics (CTS), 2021.

a) The impact on exports and imports during 2020 compared to 2019

Exports and imports give a picture of how the region has fared. An even balance of trade —see the year-on-year variations— is not necessarily a favourable result, as the fall in imports may affect the industrial sector in different ways. Firstly, the fall in the consumption of imported goods is related to the harmful effects of border closures, measures adopted at the start of the pandemic, which also hinder recovery; secondly, national industrial capacities have declined, making recovery more difficult, with repercussions that can drive unemployment and a loss of investment in capital goods, exacerbating the related economic and social crises. While exports from certain countries and territories have shown some signs of recovery, this may be partially a result of the growth in agricultural exports, driven by an increase in overall consumption to ensure food security during the peak in COVID-19. Thirdly, regional currencies have depreciated, which appears to have fuelled export growth.

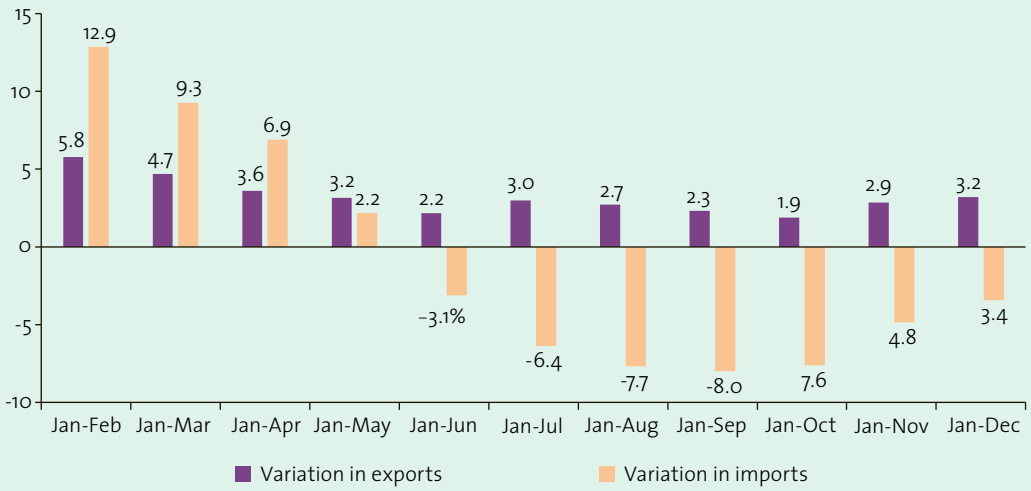
This section describes the main trends in Latin American and Caribbean imports and exports by subregion. For trade, containers that were full in both directions —export and import— were analysed, except in specific cases that will be indicated.

The three countries on the east coast of South America (Argentina, Brazil and Uruguay) performed best compared to the rest of the subregions, with the monthly cumulative figure showing rises in exports throughout the year, and falls in imports from the middle of 2020 onward, as shown in figure 2.

Figure 2

East coast of South America: exports and imports in shipping containers, cumulative year-on-year variation from 2019 to 2020, by groups of months

(On the basis of TEUs, in percentages)

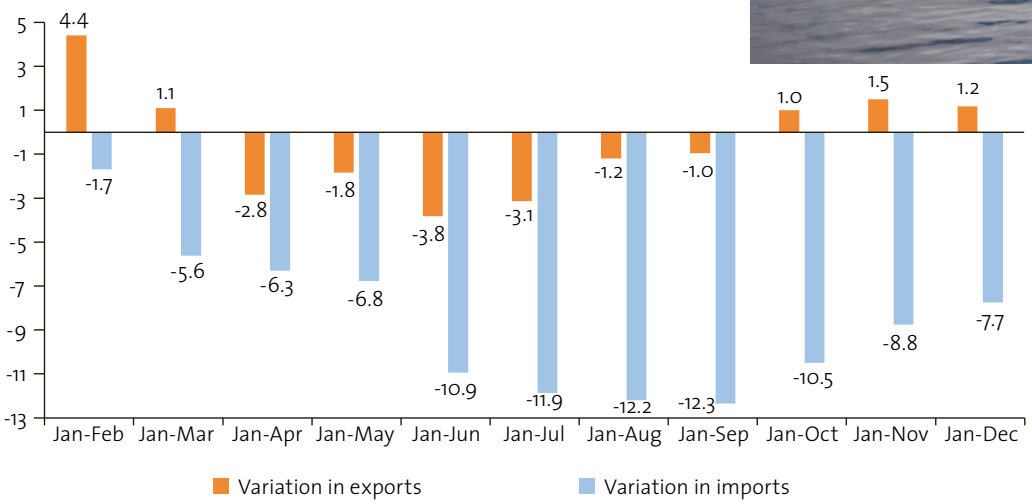


Source: Prepared by the authors, on the basis of information provided by the National Water Transport Agency (ANTAQ) for Brazil; for Argentina, data from Datamar; and for Uruguay, data from the Shipping Centre (CENNAVE).

Note: All container ports in Argentina, Brazil and Uruguay were included in the calculation.

On the west coast of South America, Peru and Chile show year-on-year declines in the cumulative figures for 2020 in both exports and imports. However, in the last quarter of 2020 Chile began to show very slight signs of a recovery (1%) in exports. Ecuador and Colombia (Buenaventura), show some volatility throughout the year in the monthly cumulative figures for 2020, compared to the previous year. See figure 3.

Figure 3
West coast of South America: shipping container exports and imports, cumulative year-on-year variation from 2019 to 2020, by group of months
(On the basis of TEUs, in percentages)

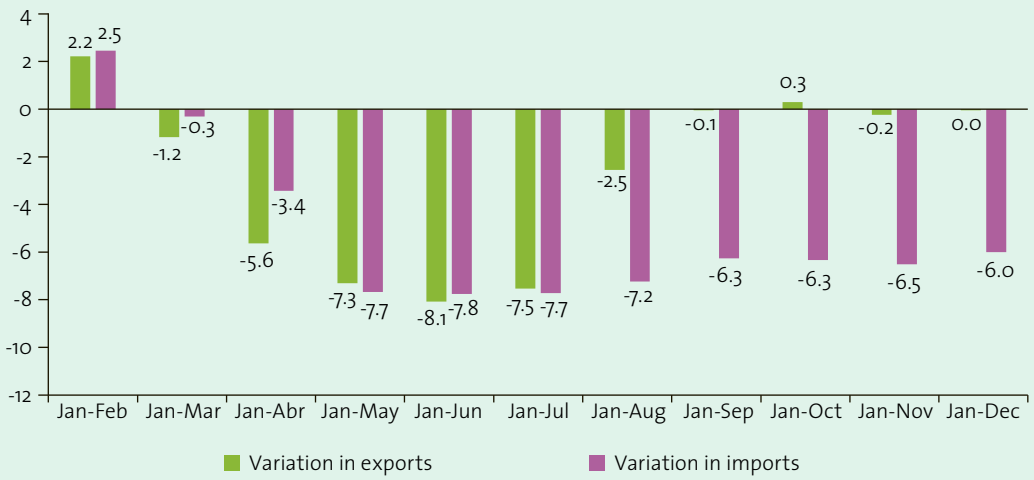


Source: Prepared by the authors, on the basis of information provided by Ecuador, data from the Ministry of Transport and Public Works; for Peru, data from the National Port Authority of Peru; for Chile, data for public ports are from the Ministry of Transport and Telecommunications and the Business System of the Ministry of the Economy, Development and Tourism; and, for the private ports of Puerto de Coronel, Puerto de Lirquén and Puerto Angamos, the data were sent directly by the ports; for Buenaventura, Colombia, data are from terminal operators.

Note: The calculation includes the following ports: for Ecuador, Guayaquil, representing 91.4% of national throughput in 2019; for Peru, Callao, accounting for 86.4% of national throughput in 2019; and for Chile, all the ports that accounted for around 99.2% of national throughput in 2019.

At the start of 2020, there was year-on-year growth in the Caribbean, but from March onward there were declines in both exports and imports; above all in imports, as the region imports for consumption. Figure 4 shows the variations in exports and imports over the course of 2020 and the changes from the previous year.

Figure 4
The Caribbean: exports and imports in shipping containers, cumulative year-on-year variation from 2019 to 2020, by groups of months
(On the basis of TEUs, in percentages)

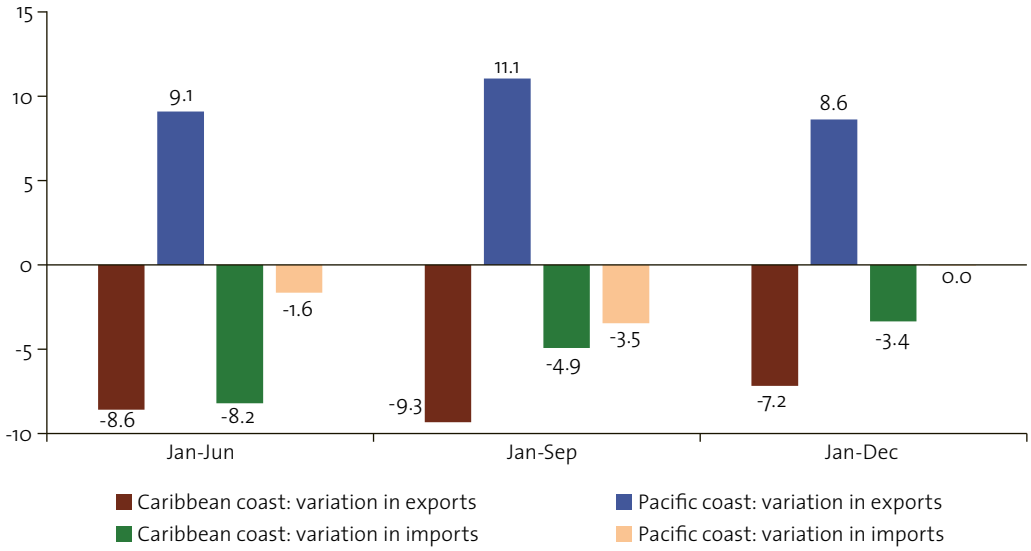


Source: Prepared by the authors, on the basis of information provided by Aruba Stevedoring Company for Aruba; for Barbados and Guadeloupe, data from terminal operators; for Guyana, data from the Maritime Administration Department; for Barranquilla in Colombia, data from the Port of Barranquilla; for Cartagena in Colombia, data from the Regional Port Company of Cartagena; for Santa Marta in Colombia, data from the Port of Santa Marta (SPSM); for Jamaica, data from The Port Authority of Jamaica (PAJ); for Trinidad and Tobago, data from the Point Lisas Industrial Port Development Corporation (PLIPDECO); for Saint Vincent and the Grenadines and the Cayman Islands, port authority data; for Dominican Republic, data from terminal operators; for Puerto Rico, data from the Puerto Rico Ports Authority.
Note: for Jamaica and Guyana both full and empty containers are included in the calculations of exports and imports.

In Central America, exports from the Pacific coast show cumulative year-on-year increases throughout 2020. However, the Caribbean coast and imports on both coasts show year-on-year declines throughout the year.

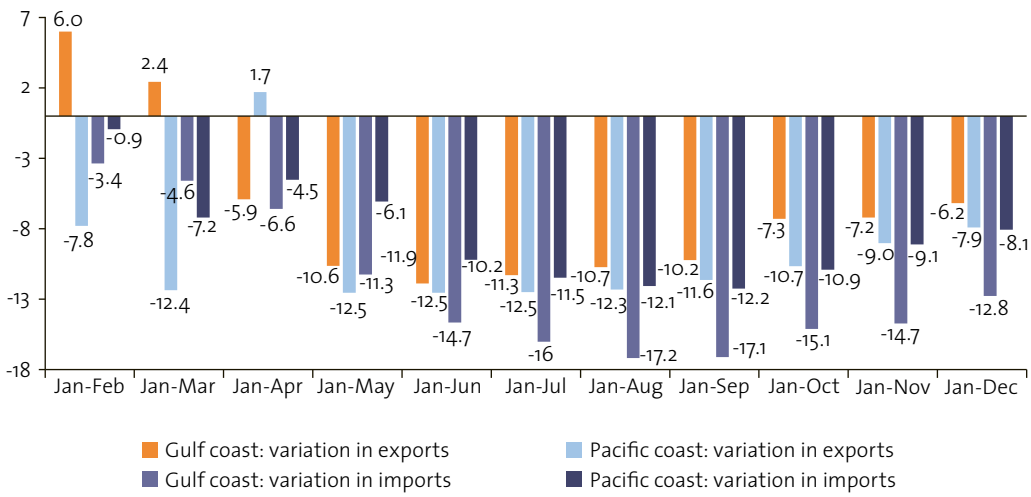
Mexico's trade is in sharp decline on both coasts, and Central America is also following the regional pattern of declining imports and exports. Figure 6 shows that, across the board, the Gulf and Pacific coasts have both performed considerably worse than in 2019.

Figure 5
Central America (Caribbean coast and Pacific coast): exports and imports in shipping containers, cumulative year-on-year variation from 2019 to 2020, by groups of months
(On the basis of TEUs, in percentages)



Source: Prepared by the authors, on the basis of information provided by the Central American Commission on Maritime Transport (COCATRAM).
Notes: The following ports were included: Acajutla in El Salvador; Puerto Quetzal, Puerto Barrios and Santo Tomás de Castilla in Guatemala; San Lorenzo, Puerto Castilla and Puerto Cortes in Honduras; Corinto and Arlen Siu in Nicaragua; Puerto Caldera, Limón and APM in Costa Rica.

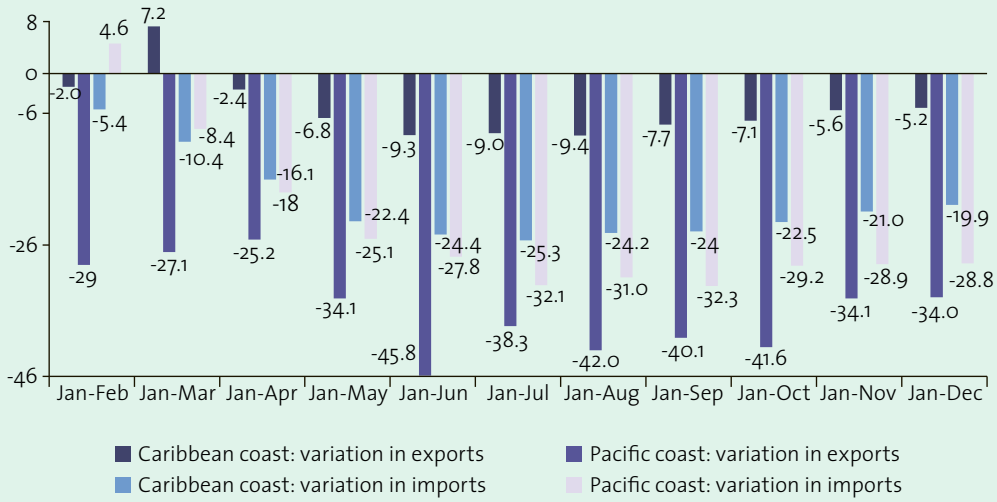
Figure 6
Mexico (Gulf coast and Pacific coast): exports and imports in shipping containers, cumulative year-on-year variation from 2019 to 2020, by groups of months
(On the basis of TEUs, in percentages)



Source: Prepared by the authors, on the basis of information provided by the Ministry of Communications and Transport of Mexico.
Note: from the Gulf coast, the ports of Altamira, Tampico, Tuxpan, Veracruz, Coatzacoalcos, Progreso and Puerto Morelos were included; from the Pacific coast, Ensenada, Guaymas, Mazatlán, Manzanillo, Lázaro Cárdenas and Puerto Chiapas.

In Panama, trade on both coasts has declined sharply, with year-on-year falls in exports from the Pacific coast of up to 45.8%.

Figure 7
Panama (Caribbean coast and Pacific coast): exports and imports in shipping containers, cumulative year-on-year variation from 2019 to 2020, by groups of months
(On the basis of TEUs, in percentages)

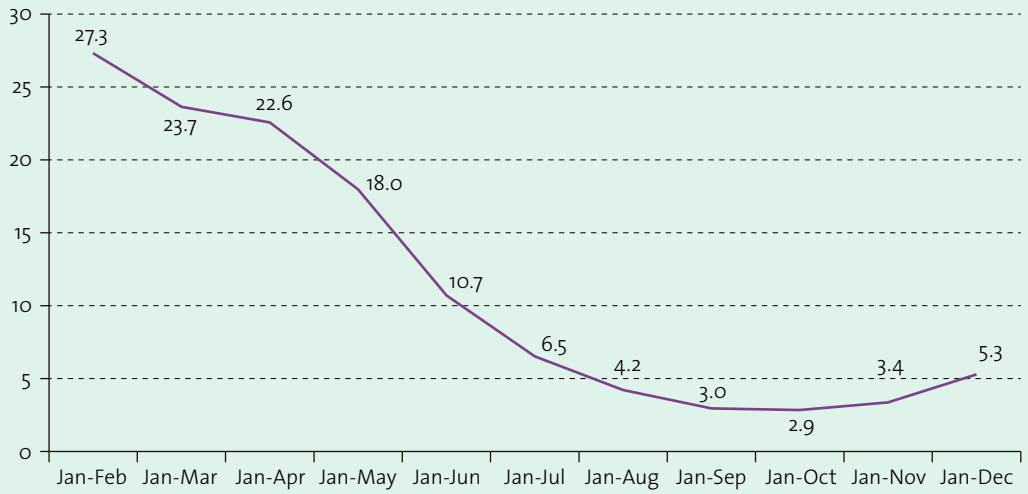


Source: Prepared by the authors, on the basis of information provided by Georgia Tech Panama Logistics Innovation and Research Center.
Note: The following ports were included: Colón, Cristóbal, Manzanillo and Bocas Fruit on the Caribbean coast and Balboa and Rodman (PSA) on the Pacific coast.

b) Changes in shipping routes and the impact on regional trans-shipment

On the east coast of South America, trans-shipment slowed over the course of 2020; although there was year-on-year growth on 2019 throughout the year, the rate slowed from 27.3% to 2.9% at the start of the last quarter.

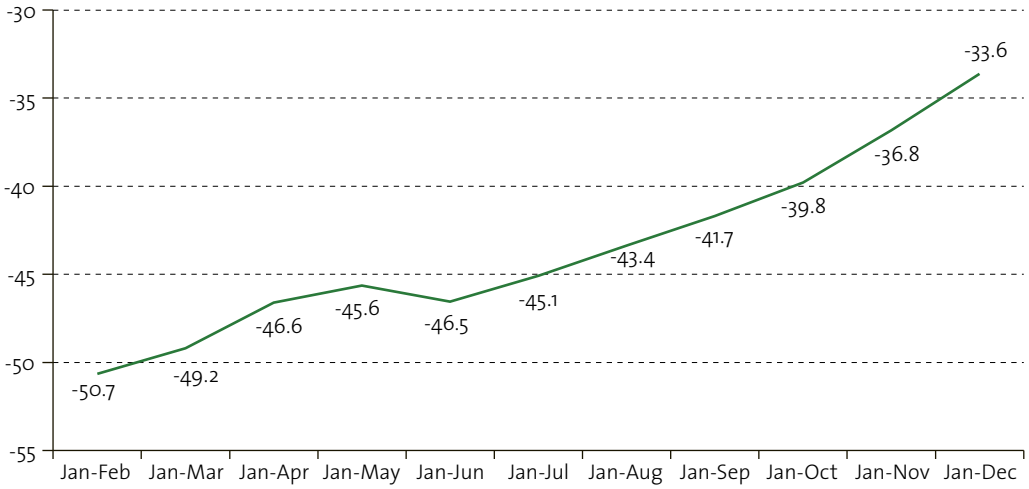
Figure 8
East coast of South America: Trans-shipment, cumulative year-on-year variation from 2019 to 2020, by groups of months
(On the basis of TEUs, in percentages)



Source: Prepared by the authors, on the basis of information provided by the National Water Transport Agency (ANTAQ) for Brazil; by the Shipping Centre (CENNAVE) for Uruguay; and by port operators in Buenos Aires, Argentina.
Note: For Argentina, only the port of Buenos Aires is included, which accounted for 82.5% of national throughput in 2019. For Brazil and Uruguay, all ports with trans-shipment activity were included.

On the west coast of South America, trans-shipment showed significant year-on-year declines throughout 2020, compared to 2019.

Figure 9
West coast of South America: trans-shipment, cumulative year-on-year variation from 2019 to 2020, by groups of months
(On the basis of TEUs, in percentages)



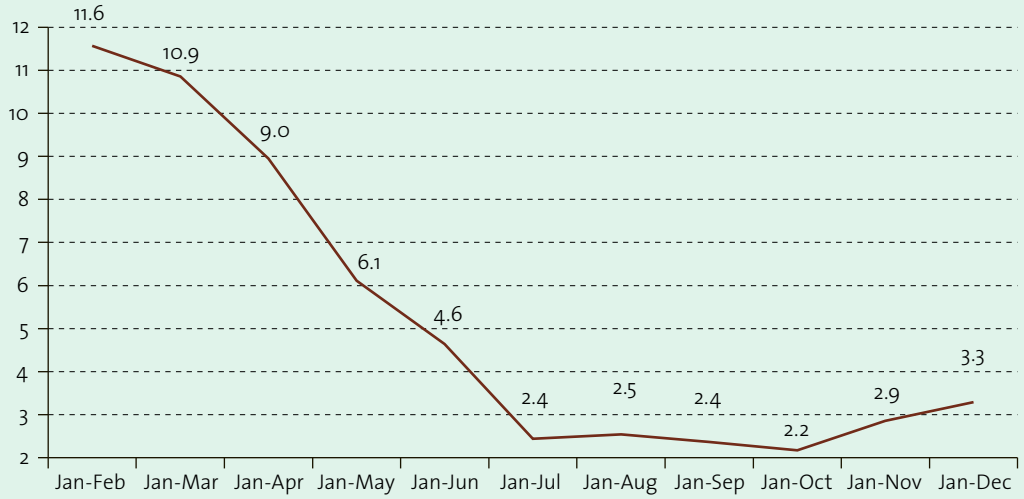
Source: Prepared by the authors, on the basis of information for Peru from the National Port Authority (APN); for Chile from the Ministry of Transport and Telecommunications and the Enterprise System (SEP) of the Ministry of Economic Affairs, Development and Tourism, and for the private ports of Puerto de Coronel, Puerto de Lirquén and Puerto Angamos, data directly from the ports; for Buenaventura, Colombia, data are from terminal operators.
Note: The following ports were included: Callao in Peru; Valparaíso, Lirquén and Angamos in Chile; and Buenaventura in Colombia.

The performance of trans-shipment in the Caribbean was possibly affected by attempts by shipowners to balance supply and demand and efforts to ensure their own survival.[3] Such measures may damage the structures of logistics networks and competition, and may even hinder a recovery in foreign trade in Latin America and the Caribbean, which is usually a net importer of international prices and has no modal options for its foreign trade. At the country and territory level, however, declines in port activity have been widespread, with the exception of Panama, primarily owing to changes in international trans-shipments. The difference between the international container trade and port movements appears to come from other port, operational and trans-shipment movements, including the movement of empty containers, offsetting the fall in international container trade. See figure 10.

In Central America, the Pacific coast outperformed the Caribbean coast. As previously mentioned, the volume of exports on the Pacific coast grew from 2019 to 2020, as did trans-shipment although its cumulative variation slowed over the year, starting with cumulative year-on-year growth of 21.8% in the first half, and reaching a cumulative decline of 0.5% for the full-year of 2020 compared to 2019. The Caribbean coast showed declines throughout the year compared to the same periods of the previous year, as shown in figure 11.

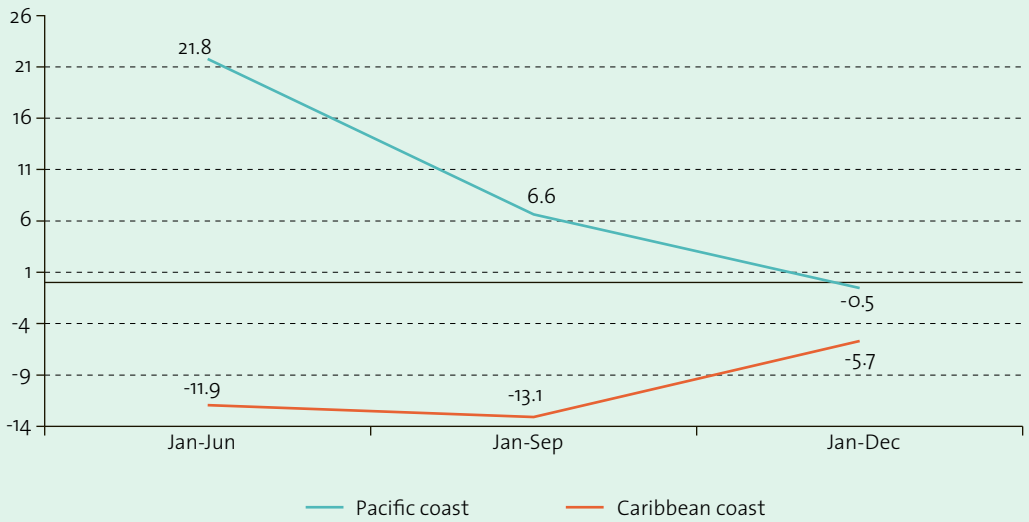
[3] For trans-shipment, both full and empty containers were included.

Figure 10
The Caribbean: trans-shipment, cumulative year-on-year variation from 2019 to 2020, by groups of months
(On the basis of TEUs, in percentages)



Source: Prepared by the authors, on the basis of information for Aruba from Aruba Stevedoring Company (ASTEC); for Barbados and Guadeloupe from terminal operators; for Cartagena in Colombia from SPRC; for Santa Marta in Colombia from the Company of the Port of Santa Marta (SPSM); for Puerto Rico from the port authority; for Jamaica from the Port Authority of Jamaica (PAJ); for Trinidad and Tobago from Point Lisas Industrial Port Development Corporation (PLIPDECO); and for Dominican Republic from terminal operators.
Note: The following ports were included: Barcadera, Oranjestad in Aruba, Bridgetown in Barbados, Jarry/Point-à-Pitre in Guadeloupe, Bahía de Cartagena (Regional Port Company of Cartagena (SPRC) and Cartagena Container Terminal (Contecar or CTC)) and Santa Marta in Colombia, Kingston in Jamaica, Port of Spain and Point Lisas in Trinidad and Tobago, and Caucedo and Haina in Dominican Republic.

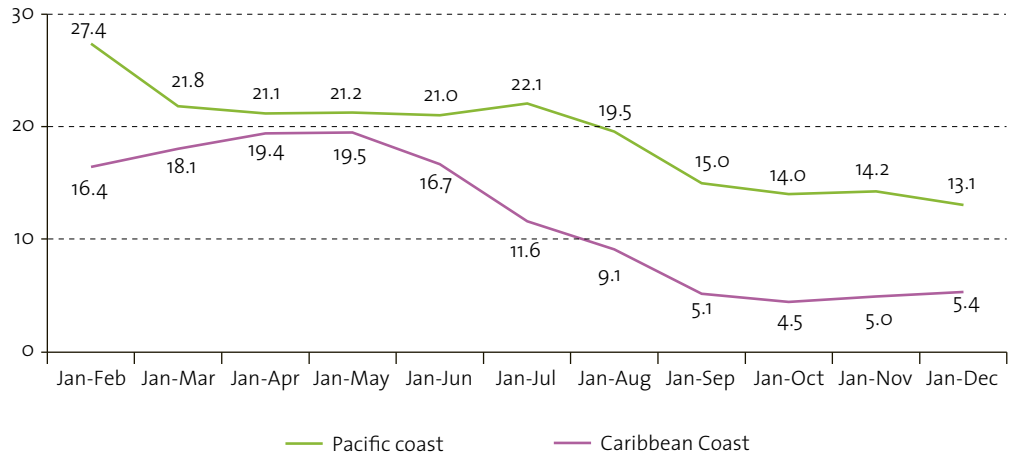
Figure 11
Central America (Caribbean coast and Pacific coast): trans-shipment, cumulative year-on-year variation from 2019 to 2020, by groups of months
(On the basis of TEUs, in percentages)



Source: Prepared by the authors, on the basis of information provided by the Central American Commission on Maritime Transport (COCATRAM).
Notes: The following ports were included: Acajutla in El Salvador; Puerto Quetzal, Puerto Barrios and Santo Tomás de Castilla in Guatemala; Limón and APM in Costa Rica.

In Panama, on both coasts trans-shipments grew throughout 2020 compared to 2019, as opposed to the country's exports and imports of full containers, which declined sharply in 2020.

Figure 12
Panama (Caribbean coast and Pacific coast): trans-shipment, cumulative year-on-year variation from 2019 to 2020, by groups of months
(On the basis of TEUs, in percentages)

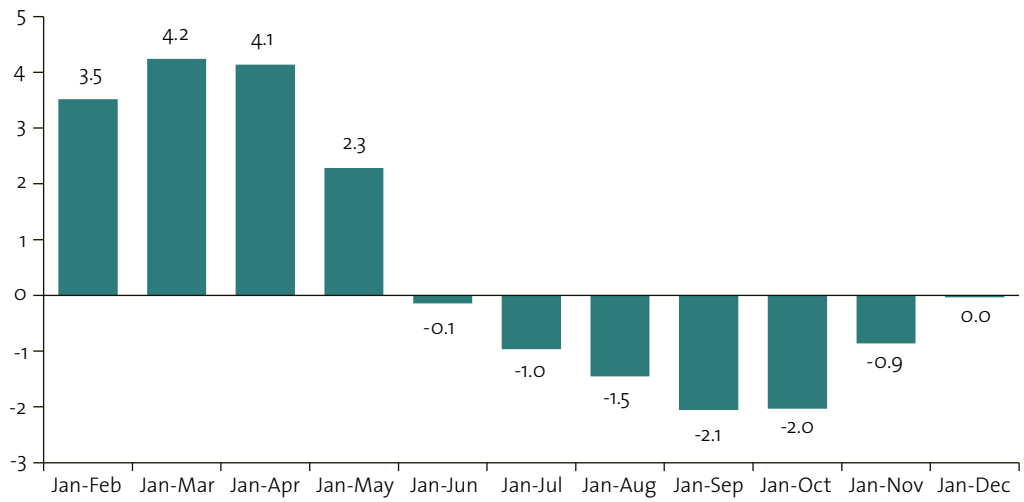


Source: Prepared by the authors, on the basis of information provided by Georgia Tech Panama Logistics Innovation and Research Center.
Note: The following ports were included: Colón, Cristóbal and Manzanillo on the Caribbean coast and Balboa and Rodman (PSA) on the Pacific coast.

(c) Throughput in Latin American and Caribbean ports in 2020 compared to 2019

On the east coast of South America, throughput showed year-on-year growth in the first few months of 2020, compared to 2019. However, from the middle of the year onward throughput declined, driven in particular by a fall in imports and a rise in trans-shipment on the east coast.

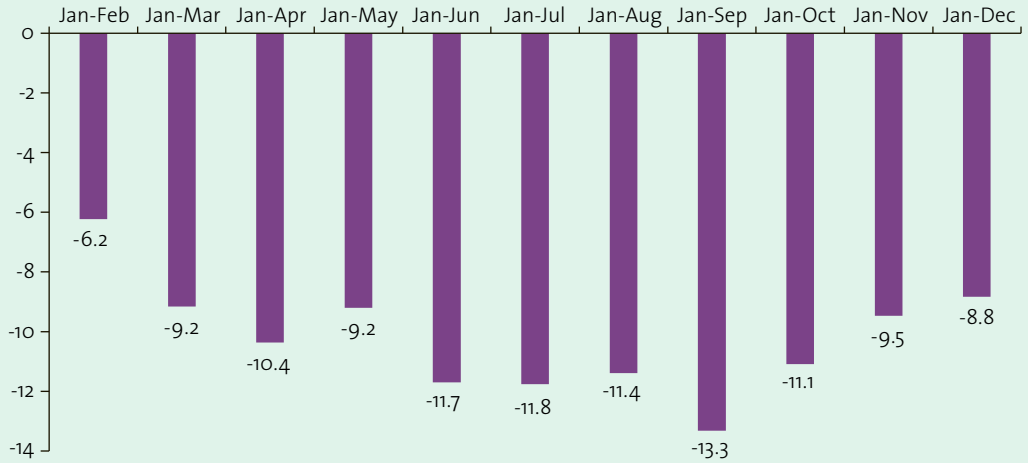
Figure 13
East coast of South America: throughput, cumulative year-on-year variation from 2019 to 2020, by groups of months
(On the basis of TEUs, in percentages)



Source: Prepared by the authors, on the basis of information for Brazil from the National Water Transport Agency (ANTAQ); and for Uruguay from the Shipping Centre (CENNAVE).
Note: For Argentina, only the port of Buenos Aires was included, which accounted for 82.5% of national throughput in 2019. The data are from port operators in Buenos Aires. For Brazil and Uruguay, all ports with container activity were included.

On the west coast of South America, there were year-on-year falls in 2020 with respect to 2019, but small ones, the most severe being the cumulative decline of 11.8% for January to July.

Figure 14
West coast of South America: throughput, cumulative year-on-year variation from 2019 to 2020, by groups of months
(On the basis of TEUs, in percentages)

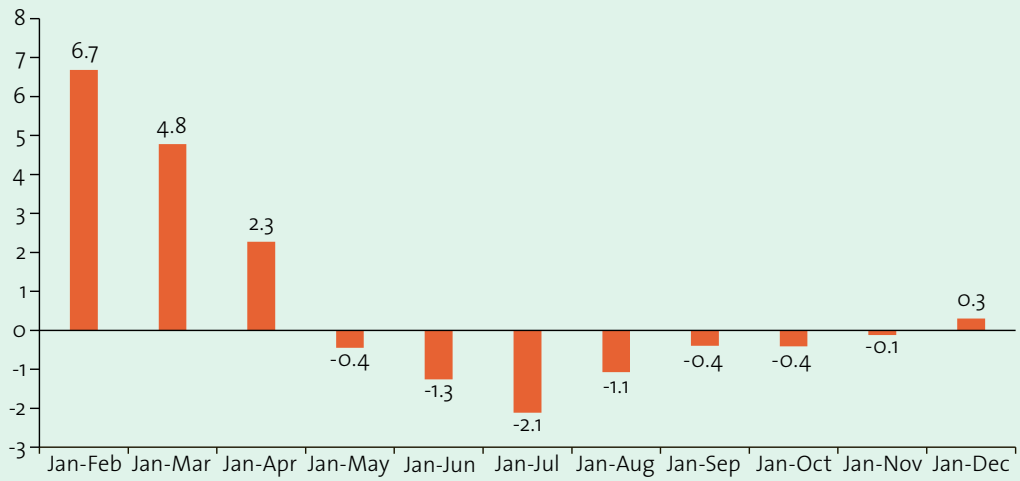


Source: Prepared by the authors, on the basis of information for Ecuador from the Ministry of Transport and Public Works; for Peru, data from the National Port Authority (APN); for Chile from the Ministry of Transport and Telecommunications and the Enterprise System (SEP) of the Ministry of Economic Affairs, Development and Tourism, and for the private ports of Puerto de Coronel, Puerto de Lirquén and Puerto Angamos, data directly from the ports.

Note: The calculation for the west coast of South America includes the ports of Guayaquil and Puerto Bolivar in Ecuador, which in 2019 accounted for 98.9% of the throughput in the country; for Chile, the sum of the ports that accounted for around 98% of national throughput in 2019; for Peru, El Callao and Paita, which in 2019 accounted for 97.7% of the throughput in the country.

The Caribbean sample only showed growth in the first few months of the year. However, the declines between May and November were not very large, and are partially explained by a rise in trans-shipment.

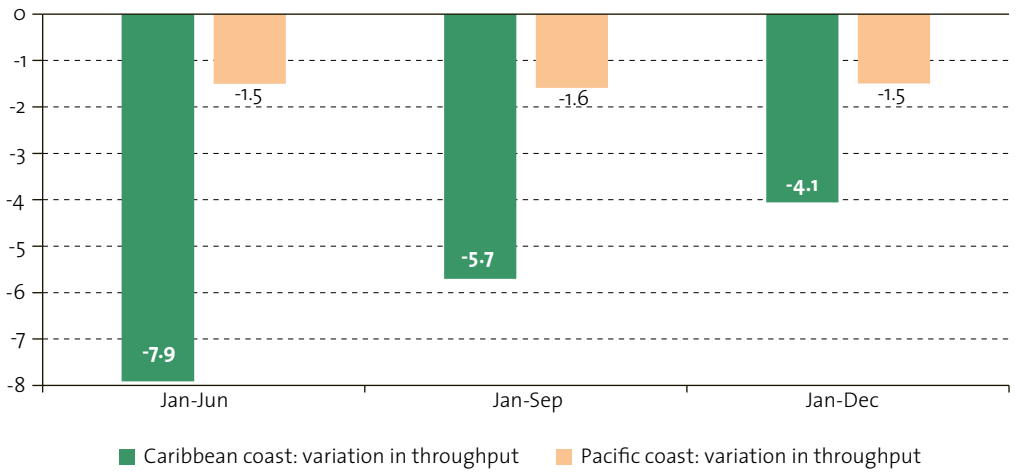
Figure 15
Caribbean: throughput, cumulative year-on-year variation from 2019 to 2020, by groups of months
(On the basis of TEUs, in percentages)



Source: Prepared by the authors, on the basis of information for Aruba from Aruba Stevedoring Company (ASTEC); for Bridgetown in Barbados and Jarry/Point-à-Pitre in Guadeloupe, data from terminal operators; for Puerto Rico from the port authority; for Georgetown in Guyana, Maritime Administration Department (MARAD) data; for Barranquilla in Colombia, data from the Port of Barranquilla; for Cartagena in Colombia from SPRC; for Santa Marta in Colombia from the Company of the Port of Santa Marta (SPSM); for Kingston in Jamaica from the Port Authority of Jamaica (PAJ); for Port of Spain and Point Lisas in Trinidad and Tobago, Point Lisas Industrial Port Development Corporation (PLIPDECO) data; for Campden Park Container Port (CPCP) and Kingstown in Saint Vincent and the Grenadines, and Georgetown-Cayman in the Cayman Islands, port authority data; for Caucedo and Haina in Dominican Republic, data from terminal operators.

In Central America, on both coasts, there was a drop in the cumulative throughput per quarter. The Pacific coast produced better results in terms of exports and trans-shipment, but not enough to ensure throughput growth from 2019 to 2020. Nonetheless, the falls were slight. The Caribbean coast results were weaker, as shown in figure 16.

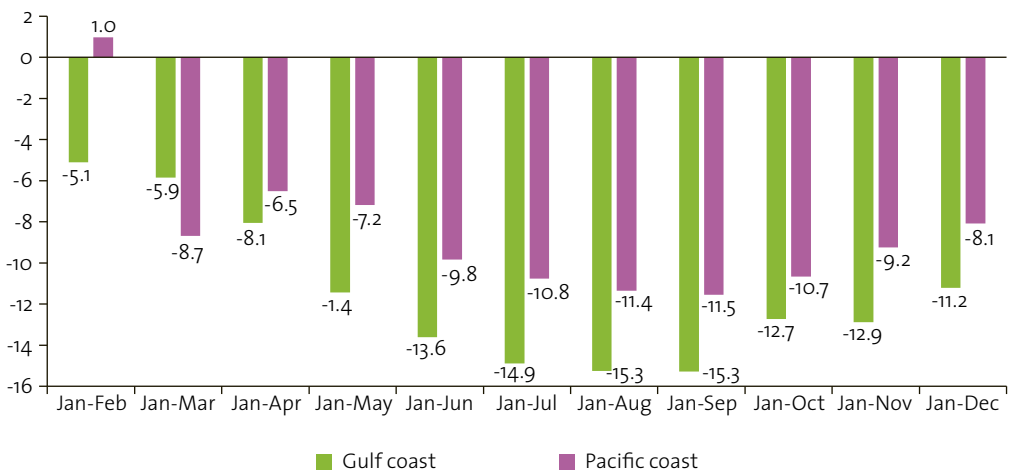
Figure 16
Central America (Caribbean coast and Pacific coast): throughput, cumulative year-on-year variation from 2019 to 2020, by groups of months
(On the basis of TEUs, in percentages)



Source: Prepared by the authors, on the basis of information provided by the Central American Commission on Maritime Transport (COCATRAM).
Notes: The following ports were included: Acajutla in El Salvador; Puerto Quetzal, Puerto Barrios and Santo Tomás de Castilla in Guatemala; San Lorenzo, Puerto Castilla and Puerto Cortes in Honduras; Corinto and Arlen Siu in Nicaragua; Puerto Caldera, Limón and APM in Costa Rica.

Both coasts of Mexico saw declines, with only one rise during the whole of 2020, compared to 2019. Exports and imports fell year-on-year in 2020, reflecting declines in trade in national throughput, as shown in figure 17.

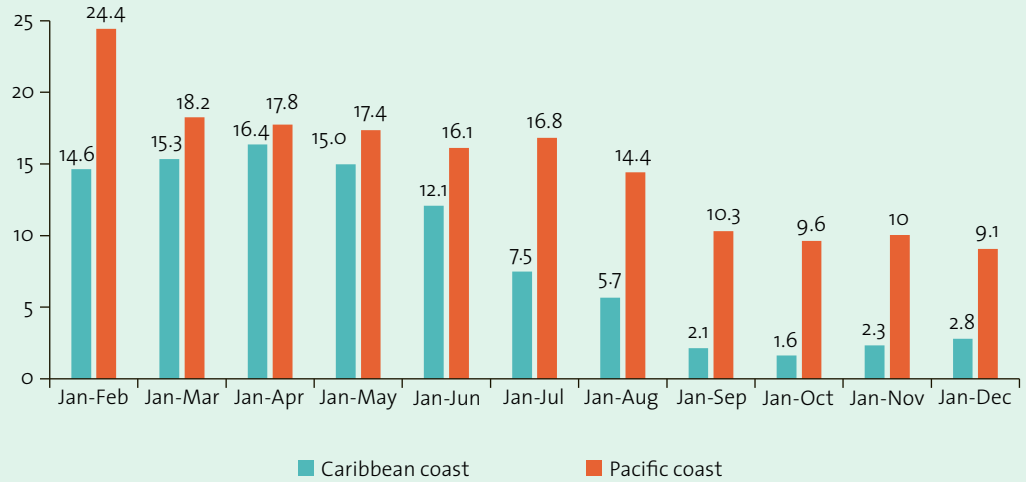
Figure 17
Mexico (Gulf coast and Pacific coast): throughput, cumulative year-on-year variation from 2019 to 2020, by groups of months
(On the basis of TEUs, in percentages)



Source: Prepared by the authors, on the basis of information provided by the Ministry of Communications and Transport of Mexico.
Note: from the Gulf coast, the ports of Altamira, Tampico, Tuxpan, Veracruz, Coatzacoalcos, Progreso and Puerto Morelos were included; from the Pacific coast, Ensenada, Guaymas, Mazatlán, Manzanillo, Lázaro Cardenas and Puerto Chiapas.

At the country and territory level, however, port activity has declined across the board, with the exception of Panama. The performance in Panama is mainly a result of international trans-shipments, which grew year-on-year on both the Caribbean and Pacific coasts in 2020 with respect to 2019, leading to a rise in Panama's throughput throughout 2020, as shown in figure 18.

Figure 18
Panama (Caribbean coast and Pacific coast): throughput, cumulative year-on-year variation from 2019 to 2020, by groups of months
(On the basis of TEUs, in percentages)



Source: Prepared by the authors, on the basis of information provided by Georgia Tech Panama Logistics Innovation and Research Center.
Note: The following ports were included: Colón, Cristóbal, Manzanillo and Bocas Fruit on the Caribbean coast and Balboa and Rodman (PSA) on the Pacific coast.

II. Classification of ports in Latin America and the Caribbean by performance in 2020

This section provides the classification of trade and throughput at the national level and port level, including all container terminals in the ports or port areas indicated, unless otherwise specified.

Shipping container trade (the sum of exports and imports) fell 4.0% year-on-year in 2020, across a sample of 88 Latin American and Caribbean ports and port areas, with declines relative to 2019 in almost all subregions. According to the data provided, in 2020 the east coast of South America recorded a fall of 0.2% in port trade activity (including Paraguay). The west coast of South America also recorded a decline in trade, which was 3.1% lower year-on-year in 2020. In the Caribbean there was a fall of 4.9% in 2020 compared to 2019. In Central America, the Caribbean coast saw sharper falls than the Pacific coast, with a drop in containerized trade on the former of 5.7% and an increase —the only one in any subregion— of 3.1% on the Pacific coast. In Mexico, the fall on the Gulf coast was 9.8% and on the Pacific coast it was 8.0%. Lastly, Panama had the largest falls in trade: the Caribbean coast saw a downturn of 15.1% and the Pacific coast 30.4%.

Table 3
Classification of ports or port areas by trade performance, 2020
(TEUs)

Classification	Port	Total trade 2019	Total trade 2020	Variation 2019–2020 *(in percentages)*
1	Santos Port Area (includes DP World), Brazil	2 449 646	2 507 427	2.4
2	Manzanillo, Mexico	2 098 562	2 024 118	-3.5
3	Guayaquil (all terminals), Ecuador	1 241 756	1 266 302	2.0
4	El Callao, Peru	1 298 100	1 226 474	-5.5
5	San Antonio, Chile	1 145 443	1 143 548	-0.2
6	San Juan, Puerto Rico	914 962	946 491	3.4
7	Metropolitan Area of Buenos Aires (AMBA) (includes Dock Sud, La Plata and Puerto Nuevo), Argentina	943 852	917 386	-2.8
8	Itajaí (includes Portonave and Navegantes), Brazil	706 027	756 133	7.1
9	Veracruz, Mexico	860 891	753 973	-12.4
10	Limón and APM, Costa Rica	720 482	709 720	-1.5
11	Buenaventura, Colombia	718 945	644 455	-10.4
12	Altamira and Tampico, Mexico	692 943	636 793	-8.1
13	Lázaro Cárdenas, Mexico	845 267	635 397	-24.8
14	Paranaguá, Brazil	610 620	635 104	4.0
15	Coronel, Chile	574 335	618 079	7.6
16	Bahía de Cartagena (Regional Port Company of Cartagena (SPRC) and Cartagena Container Terminal (Contecar or CTC), Colombia	543 971	526 092	-3.3
17	Valparaíso, Chile	565 165	469 453	-16.9
18	Puerto Cortes, Honduras	513 114	431 119	-16.0
19	Caucedo, Dominican Republic	416 634	387 905	-6.9
20	Santo Tomás de Castilla, Guatemala	407 919	368 925	-9.6
21	Puerto Quetzal, Guatemala	326 248	357 658	9.6
22	São Francisco do Sul - Itapoá, Brazil	369 163	350 601	-5.0
23	Lirquén, Chile	328 128	338 561	3.2
24	Barcadera-Oranjestad, Aruba	402 633	335 814	-16.6
25	Caribbean coast of Panama (including Colón, Cristóbal and Manzanillo)	388 750	309 386	-20.4
26	Rio Grande (includes Porto Alegre), Brazil	312 036	296 045	-5.1
27	Kingston, Jamaica	306 531	280 670	-8.4
28	Ensenada, Mexico	234 023	268 582	14.8
29	Puerto Barrios, Guatemala	253 113	266 051	5.1
30	Haina, Dominican Republic	284 985	265 375	-6.9
31	Montevideo, Uruguay	263 694	255 812	-3.0
32	Puerto Caldera, Costa Rica	210 762	218 394	3.6
33	Rio De Janeiro, Brazil	228 640	210 233	-8.1
34	Manaus Port Area, Brazil	174 009	180 600	3.8
35	Paita, Peru	161 483	174 200	7.9
36	Jarry/Point-à-Pitre, Guadeloupe	160 122	173 260	8.2
37	Talcahuano/San Vicente, Chile	202 607	165 008	-18.6
38	Salvador, Brazil	167 201	162 256	-3.0
39	Acajutla, El Salvador	151 818	142 979	-5.8
40	Iquique, Chile	167 177	140 514	-15.9
41	Vitória, Brazil	131 102	131 462	0.3
42	Pacific coast of Panama (including Balboa and Rodman (PSA)	187 333	130 457	-30.4

Table 3 (concluded)

Classification	Port	Total trade 2019	Total trade 2020	Variation 2019–2020 *(in percentages)*
43	Puerto Angamos, Chile	89 940	121 884	35.5
44	Arica, Chile	144 362	115 356	-20.1
45	Corinto, Nicaragua	115 539	113 780	-1.5
46	Santa Marta, Colombia	108 081	110 131	1.9
47	Point Lisas, Trinidad and Tobago	110 774	109 100	-1.5
48	Fort-de-France, Martinique	119 438	103 464	-13.4
49	Barranquilla, Colombia	119 478	102 280	-14.4
50	Suape, Brazil	101 409	101 359	0.0
51	Puerto Bolivar, Ecuador	73 486	97 436	32.6
52	Port of Spain, Trinidad and Tobago	101 064	94 839	-6.2
53	Pecém - Fortaleza, Brazil	90 994	92 269	1.4
54	Progreso, Mexico	94 380	88 721	-6.0
55	Itaguaí, Brazil	124 318	87 897	-29.3
56	Puerto Castilla, Honduras	74 476	82 228	10.4
57	Zárate, Argentina	92 395	79 872	-13.6
58	Vila do Conde - Belém, Brazil	87 071	77 932	-10.5
59	Georgetown, Guyana	66 959	64 241	-4.1
60	Bocas Fruit, Panama	38 676	53 408	38.1
61	Rosario, Argentina	50 905	46 076	-9.5
62	Bridgetown, Barbados	46 800	45 060	-3.7
63	Natal, Brazil	38 344	43 203	12.7
64	Georgetown-Cayman, Cayman Islands	43 058	41 308	-4.1
65	Antofagasta, Chile	56 135	37 329	-33.5
66	Turbo, Colombia	53 943	29 103	-46.0
67	Mazatlán, Mexico	30 630	28 353	-7.4
68	Puerto Chiapas, Mexico	31 338	24 984	-20.3
69	Tuxpan, Mexico	19 142	23 069	20.5
70	San Lorenzo, Honduras	19 360	16 786	-13.3
71	Austral, Chile	17 491	15 922	-9.0
72	Ilo, Peru	13 435	15 280	13.7
73	Coatzacoalcos, Mexico	9 463	12 243	29.4
74	Guaymas, Mexico	14 131	11 688	-17.3
75	Campden Park Container Port (CPCP), Saint Vincent and the Grenadines	10 723	10 413	-2.9
76	Matarani, Peru	12 781	10 308	-19.3
77	Pisco, Peru	6 335	9 562	50.9
78	Arlen Siu, Nicaragua	6 336	4 975	-21.5
79	Manta, Ecuador	3 793	4 938	30.2
80	Esmeraldas, Ecuador	10 406	4 586	-55.9
81	Puerto Morelos, Mexico	5 744	3 475	-39.5
82	TecPlata, Argentina	1 895	2 000	5.5
83	Pucallpa, Peru	556	1 736	212.2
84	San Andrés, Colombia	2 889	1 729	-40.2
85	Kingstown, Saint Vincent and the Grenadines	1 360	1 432	5.3
86	Chacabuco, Chile	1 616	1 022	-36.8
87	Coquimbo, Chile	838	714	-14.8
88	Guajira, Colombia	1 097	281	-74.4

Source: Prepared by the authors, on the basis of information provided by port authorities, relevant institutions and terminal operators of the respective terminals or ports.

Table 4 shows the performance of trade by country and territory in Latin America and the Caribbean.

Table 4
Country classification by trade performance, 2020
(TEUs)

Classification	Country	Total trade 2019	Total trade 2020	Variation 2019–2020 *(in percentages)*
1	Brazil	5 590 581	5 632 522	0.8
2	Mexico	4 936 514	4 511 396	-8.6
3	Chile	3 293 237	3 167 390	-3.8
4	Peru	1 492 690	1 437 560	-3.7
5	Colombia	1 548 404	1 414 071	-8.7
6	Ecuador	1 329 441	1 373 262	3.3
7	Argentina	1 171 101	1 128 704	-3.6
8	Guatemala	987 280	992 634	0.5
9	Puerto Rico	914 962	946 491	3.4
10	Costa Rica	931 244	928 114	-0.3
11	Dominican Republic	701 619	653 280	-6.9
12	Honduras	606 950	530 133	-12.7
13	Panama	614 759	493 251	-19.8
14	Aruba	402 633	335 814	-16.6
15	Jamaica	306 531	280 670	-8.4
16	Uruguay	263 694	255 812	-3.0
17	Trinidad and Tobago	211 838	203 939	-3.7
18	Guadeloupe	160 122	173 260	8.2
19	Paraguay	160 547	153 094	-4.6
20	El Salvador	151 818	142 979	-5.8
21	Nicaragua	121 875	118 755	-2.6
22	Martinique	119 438	103 464	-13.4
23	Guyana	66 959	64 241	-4.1
24	Barbados	46 800	45 060	-3.7
25	Cayman Islands	43 058	41 308	-4.1
26	Saint Vincent and the Grenadines	12 083	11 845	-2.0

Source: Prepared by the authors, on the basis of information provided by port authorities, relevant institutions and terminal operators of the respective terminals or ports.

In terms of the throughput of the same sample, some subregions of Latin America and the Caribbean show cumulative year-on-year growth in 2020. Panama performed best, with rises of 9.1% and 2.8% on the Pacific and Caribbean coasts, respectively. The third best performance was in the Caribbean, with year-on-year growth of 1.7% in 2020. The performance of the east coast of South America was almost identical to the prior year, with a year-on-year decline of just 0.3% in 2020. Central America (excluding Mexico) saw declines on both coasts, with falls of 1.5% and 4.1% on the Pacific and Caribbean coasts, respectively. There were also year-on-year falls on both coasts of Mexico, of 1.5% and 11.2% on the Pacific and Gulf coasts, respectively. The west coast of South America recorded a year-on-year drop of 8.9% in 2020.

The following is a classification of port performance in 2020 of 102 countries and territories in Latin America and the Caribbean, from most to least movement. In the previous report, the sample of ports and port areas was larger because in this report there is more port clustering.

Table 5
Classification of ports and port areas by throughout, 2020
(TEUs)

Classification	Port	2019 throughput	2020 throughput	Variation 2019–2020 *(in percentages)*
1	Caribbean coast of Panama (including Colón, Cristóbal and Manzanillo)	4 379 477	4 454 902	1.7
2	Santos Port Area (includes DP World), Brazil	4 165 248	4 232 046	1.6
3	Pacific coast of Panama (including Balboa and Rodman (PSA)	2 898 836	3 161 658	9.1
4	Bahía de Cartagena (Regional Port Company of Cartagena (SPRC) and Cartagena Container Terminal (Contecar or CTC), Colombia	2 932 371	3 127 162	6.6
5	Manzanillo, Mexico	3 069 188	2 909 599	-5.2
6	El Callao, Peru	2 313 907	2 250 827	-2.7
7	Guayaquil (all terminals), Ecuador	2 073 776	2 071 124	-0.1
8	Kingston, Jamaica	1 626 291	1 611 637	-0.9
9	San Antonio, Chile	1 705 707	1 556 708	-8.7
10	San Juan, Puerto Rico	1 451 950	1 490 218	2.6
11	Metropolitan Area of Buenos Aires (AMBA) (includes Dock Sud, La Plata and Puerto Nuevo), Argentina	1 485 328	1 371 980	-7.6
12	Itajaí (includes Portonave and Navegantes), Brazil	1 235 251	1 273 469	3.1
13	Limón and APM, Costa Rica	1 246 748	1 213 431	-2.7
14	Caucedo, Dominican Republic	1 263 991	1 185 230	-6.2
15	Lázaro Cárdenas, Mexico	1 318 732	1 063 675	-19.3
16	Veracruz, Mexico	1 144 156	1 005 936	-12.1
17	Buenaventura, Colombia	1 509 275	949 957	-37.1
18	Paranaguá, Brazil	865 110	925 157	6.9
19	Altamira and Tampico, Mexico	889 094	776 999	-12.6
20	Montevideo, Uruguay	747 100	761 855	2.0
21	Valparaíso, Chile	904 722	735 026	-18.8
22	São Francisco do Sul - Itapoá, Brazil	735 139	712 646	-3.1
23	Manaus Port Area, Brazil	681 097	706 677	3.8
24	Rio Grande (includes Porto Alegre), Brazil	700 659	684 276	-2.3
25	Coronel, Chile	574 335	618 079	7.6
26	Puerto Cortes, Honduras	643 856	551 250	-14.4
27	Santo Tomás de Castilla, Guatemala	565 388	537 316	-5.0
28	Puerto Quetzal, Guatemala	507 811	519 571	2.3
29	Suape, Brazil	476 306	484 171	1.7
30	Puerto Barrios, Guatemala	455 811	479 876	5.3
31	Pecém - Fortaleza, Brazil	404 459	420 540	4.0
32	Haina, Dominican Republic	411 527	407 262	-1.0
33	Ensenada, Mexico	337 742	384 871	14.0
34	Rio De Janeiro, Brazil	372 907	381 298	2.3
35	Barcadera-Oranjestad, Aruba	411 169	342 526	-16.7
36	Lirquén, Chile	330 769	340 112	2.8
37	Paita, Peru	303 278	335 098	10.5
38	Salvador, Brazil	323 645	327 529	1.2
39	Puerto Caldera, Costa Rica	298 175	296 243	-0.6
40	Talcahuano/San Vicente, Chile	370 450	287 240	-22.5
41	Santa Marta, Colombia	235 695	259 378	10.0
42	Port of Spain, Trinidad and Tobago	270 856	236 370	-12.7

Table 5 (continued)

Classification	Port	2019 throughput	2020 throughput	Variation 2019–2020 *(in percentages)*
43	Acajutla, El Salvador	249 482	228 334	-8.5
44	Vitória, Brazil	226 635	222 218	-1.9
45	Jarry/Point-à-Pitre, Guadeloupe	206 959	220 233	6.4
46	Iquique, Chile	270 147	217 814	-19.4
47	Puerto Bolivar, Ecuador	158 500	207 595	31.0
48	Puerto Angamos, Chile	150 511	185 390	23.2
49	Itaguaí, Brazil	253 987	179 261	-29.4
50	Point Lisas, Trinidad and Tobago	175 376	170 408	-2.8
51	Arica, Chile	218 746	167 512	-23.4
52	Corinto, Nicaragua	167 798	166 612	-0.7
53	Fort-de-France, Martinique	178 277	164 495	-7.7
54	Progreso, Mexico	153 319	147 514	-3.8
55	Barranquilla, Colombia	169 198	146 570	-13.4
56	Zárate, Argentina	142 419	122 880	-13.7
57	Puerto Castilla, Honduras	110 000	118 317	7.6
58	Bocas Fruit, Panama	68 546	117 464	71.4
59	Vila do Conde - Belém, Brazil	129 820	111 490	-14.1
60	Bridgetown, Barbados	98 459	89 460	-9.1
61	Rosario, Argentina	78 316	70 886	-9.5
62	Turbo, Colombia	69 657	69 974	0.5
63	Georgetown, Guyana	66 959	64 241	-4.1
64	Antofagasta, Chile	83 537	58 399	-30.1
65	Imbituba, Brazil	58 887	51 814	-12.0
66	Natal, Brazil	46 688	47 218	1.1
67	Puerto Chiapas, Mexico	53 012	42 284	-20.2
68	Mazatlán, Mexico	50 111	41 668	-16.8
69	Georgetown-Cayman, Cayman Islands	43 058	41 308	-4.1
70	Tuxpan, Mexico	39 589	40 769	3.0
71	San Lorenzo, Honduras	36 851	30 496	-17.2
72	Ilo, Peru	25 931	27 959	7.8
73	San Antonio Este, Argentina	22 142	27 440	23.9
74	Austral, Chile	28 585	24 515	-14.2
75	Providenciales, Turks and Caicos Islands	n/a	24 284	n/a
76	Coatzacoalcos, Mexico	17 722	23 950	35.1
77	Bahía Blanca, Argentina	25 571	22 328	-12.7
78	Puerto Madryn, Argentina	18 490	21 911	18.5
79	Pisco, Peru	14 865	21 049	41.6
80	Campden Park Container Port (CPCP), Saint Vincent and the Grenadines	18 222	18 446	1.2
81	Guaymas, Mexico	20 975	15 882	-24.3
82	Matarani, Peru	17 438	15 486	-11.2
83	Porto Velho, Brazil	14 740	15 396	4.5
84	San Andrés, Colombia	19 376	14 562	-24.8
85	Puerto Deseado, Argentina	18 549	12 584	-32.2
86	Itaquí, Brazil	1 284	10 964	753.9
87	Manta, Ecuador	6 353	8 476	33.4
88	Esmeraldas, Ecuador	18 998	7 369	-61.2
89	Arlen Siu, Nicaragua	7 573	6 189	-18.3
90	Mar del Plata, Argentina	5 760	5 366	-6.8
91	Puerto Morelos, Mexico	8 889	5 164	-41.9

Table 5 (concluded)

Classification	Port	2019 throughput	2020 throughput	Variation 2019–2020 *(in percentages)*
92	Pucallpa, Peru	832	3 305	297.2
93	Salina Cruz, Mexico	3 351	3 165	-5.6
94	La Plata (TecPlata), Argentina	2 916	3 077	5.5
95	Euroamerica, Argentina	1 148	2 307	101.0
96	Chacabuco, Chile	3 272	2 139	-34.6
97	Kingstown, Saint Vincent and the Grenadines	1 928	2 023	4.9
98	Coquimbo, Chile	924	1 602	73.4
99	Puerto Montt, Chile	834	1 280	53.5
100	Yurimaguas, Peru	187	551	194.7
101	Guajira, Colombia	2 687	551	-79.5
102	Molca, Argentina	2 945	200	-93.2

Source: Prepared by the authors, on the basis of information provided by port authorities, relevant institutions and terminal operators of the respective terminals or ports.

The ten countries and territories that contributed the most to the volume of cargo handled in the region accounted for 84.0% of total regional throughput. In 2020, the total throughput of the Latin American and Caribbean sample represented 6.3% of the global total.

Table 6
Country classification by throughput, 2020
(TEUs)

Classification	Country	2019 throughput	2020 throughput	Variation 2019–2020 *(in percentages)*
1	Brazil	10 691 861	10 786 170	0.9
2	Panama	7 346 859	7 734 024	5.3
3	Mexico	7 105 880	6 461 476	-9.1
4	Colombia	4 938 259	4 568 154	-7.5
5	Chile	4 642 539	4 195 816	-9.6
6	Peru	2 676 438	2 654 275	-0.8
7	Ecuador	2 257 627	2 294 564	1.6
8	Argentina	1 803 584	1 660 959	-7.9
9	Jamaica	1 626 291	1 611 637	-0.9
10	Dominican Republic	1 675 518	1 592 492	-5.0
11	Guatemala	1 529 010	1 536 763	0.5
12	Costa Rica	1 544 923	1 509 674	-2.3
13	Puerto Rico	1 451 950	1 490 218	2.6
14	Uruguay	747 100	761 855	2.0
15	Honduras	790 707	700 063	-11.5
16	Trinidad and Tobago	446 232	406 778	-8.8
17	Venezuela (Bolivarian Republic of)	179 529	344 115	91.7
18	Aruba	411 169	342 526	-16.7
19	El Salvador	249 482	228 334	-8.5
20	Guadeloupe	206 959	220 233	6.4
21	Nicaragua	175 371	172 801	-1.5
22	Martinique	178 277	164 495	-7.7
23	Paraguay	160 547	153 094	-4.6
24	Barbados	98 459	89 460	-9.1
25	Guyana	66 959	64 241	-4.1
26	Cayman Islands	43 058	41 308	-4.1
27	Turks and Caicos Islands	25 528	24 284	-4.9
28	Saint Vincent and the Grenadines	20 150	20 469	1.6

Source: Prepared by the authors, on the basis of information provided by port authorities, relevant institutions and terminal operators of the respective terminals or ports.

III. Concluding remarks

The COVID-19 pandemic hit Latin America and the Caribbean hard, exposing long-standing problems such as a lack of infrastructure, inadequate regulation and facilitation problems, alerting the region to the need for a sustainable economic recovery, in which production and exports will depend on the integrity of logistics capacity to regain international competitiveness.

Opportunities to promote facilitation and paperless and contactless procedures for efficient and modern logistics should be explored, and economic regulation needs to be harmonized and adapted to the new circumstances. Development of paperless trade procedures and more connected logistics services could help solve persistent problems such as high logistics costs, bureaucracy and a lack of value-added logistics services. This would enable establishment of regional production chains, re-export of value-added goods and, ultimately, economies of scale, network economies and agglomeration economies in subregional trade. The ongoing crisis should be seen as providing an opportunity to change production patterns and foster digital trade and logistical innovation, to increase competitiveness and well-being in the region.

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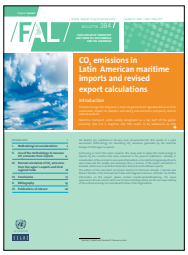
V. Publications of interest



FAL Bulletin No. 384

CO2 emissions in Latin American maritime imports and revised export calculations

Silvana Sánchez
Ricardo Sánchez

FAL Bulletin 373 published in January 2020, documented the first results of a rapid assessment methodology for calculating CO2 emissions generated by the maritime transport of the region's exports. Continuing on from that earlier research, this study aims to apply that methodology to imports by the countries that were examined in the previous publication. Similarly, in consideration of the comments received on that edition, some methodological adjustments were made and the sample was increased; thus, a revision of the export calculations is included, which now cover 82% of total Latin American and Caribbean exports.

Available in: Spanish English

FAL Bulletin No. 380

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

Eliana Barleta
Ricardo Sánchez

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.

Available in: Spanish English