



### CONTAINER THROUGHPUT IN THE REGION'S PORTS RISES 1.7% IN 2015

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The movement of cargo in containers in Latin American and Caribbean ports grew 1.7% during 2015, according to figures unveiled in ECLAC's new edition of its ranking of container port throughput, published in its [Maritime Profile](#). These figures confirm two trends observed during the last years in the region: the slowdown of foreign trade shown by container terminals and great heterogeneity of the growth rates inside the region.

Regional average of 1.7% container throughput growth, although still higher than the rate recorded in 2014 (0.8%) and 2013 (0.7%), the recovery from this severe downturn remains (figures from 2012 were 5.9%). The slow dynamism of 2015 was determined mainly by the fall in the port activity of five countries: Brazil, Peru, Puerto Rico, Trinidad & Tobago and Venezuela. The total volume of activity in 2015 was approximately 48 million TEU<sup>1</sup>. The first 40 ports in the ranking accounted for nearly 90% of the operations this type of cargo in the region, while another 98 smaller ports divided up the remaining 5.9 million TEU (equivalent to 10%) among themselves.

The figures reveal great heterogeneity in the performance of port movements, both at a subregional level as well as by country. In 2015, ECSA's activity reduction reached 1.4%, this especially considering

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<sup>1</sup> Standard unit of measurement, equivalent to a container of 20 feet, or 6.25 meters, which is to say, a metallic box of standardized size that can be transferred easily between different means of transportation, such as ships, trains and trucks

the lower expansion of throughput in Brazilian ports, where the port movements fell by 2.1% compared to the previous year. WCSA results suggest a slight increase in container throughput, with a positive variation of 1.1%. The stagnation of the container ports in Chile (0.1%) and the negative variation of Peruvian ports (-3.6%) counterbalances the growth rate in Ecuador (6.3%) and the Port of Buenaventura in the Pacific Coast of Colombia (6.6%). Central America dropped 0.1% reaching 3.4% last year versus a growth of 3.5% in 2014, whilst the throughput figures of the Caribbean ports remained flat with only +0.1% change.

At a country level, six countries stood out: Colombia (13.1%), Nicaragua (24.4%), Barbados (10.3%), St. Vincent and the Grenadines (11.3%), Monserrat (11.7%), and Anguilla (27.7%), while other six countries from the region have showed an important slowdown in their activity: Argentina (-0.3%), Brazil (-2.1%), Peru (-3.6%), Puerto Rico (-8.3%), Trinidad & Tobago (-12.4%), and Venezuela (-22.2%). Mexico increased its port activity considering the 3.8% figure of 2014 to 7.4% in 2015. In Central America, the reduced growth of Panamanian ports during 2015 hides and important rise in the port activity of some countries of the sub-region. Throughput increased in El Salvador (6.4%), Guatemala (6.9%), Honduras (8.9%) and Nicaragua (24.4%).

At an individual level, the ports that registered a relatively better performance during 2015 were: Santos (3,645,448 TEU), Colón (3,577,427 TEU), Balboa (3,294,113 TEU), Cartagena (2,606,945 TEU), Manzanillo (2,458,135 TEU), El Callao (1,900,444 TEU), Guayaquil (1,764,937 TEU), Kingston (1,653,272 TEU), Buenos Aires (1,433,053 TEU) and Freeport (1,400,000 TEU). See Table: "Latin American and the Caribbean Container Port Throughput, Ranking 2015" in annex for details. Just as in previous periods, the reasons behind growth, deceleration or an outright decrease in port activity are varied. For example, the ports of Cartagena 16.6% (Colombia), Colón 8.8% (Panama), Guayaquil 8.9% (Ecuador), Manzanillo 4.4% (Mexico), Veracruz 9.9% (Mexico), and San Antonio 7.0% (Chile) registered positive figures due to the success of their projects and commercial management, while others were affected by low trade performance in general as in the case of El Callao -4.6% (Peru), Puerto Cabello -19.2% (Venezuela), Valparaíso -10.7% (Chile), San Juan -8.8% (Puerto Rico), Río de Janeiro -28.0% (Brazil) and Balboa -5.0% (Panama).

On a global scale, during 2015, the containers traffic in ports also had a low dynamism. The global container throughput grew by only 1.1% in 2015, according to Alphaliner's estimates based on a preliminary survey of over 400 ports worldwide. Last year's global throughput growth logged the

second lowest annual growth rate ever recorded for the industry, surpassed only by the record low of 2009 when it declined by -8.4% due to the global financial crisis.

In relation to the causes, several factors have contributed to the lower container throughput growth in recent years, including<sup>2</sup>: the impact of the technological change of conversion from breakbulk to a containerized mode of transportation has plateaued; increased share of manufactured goods versus raw materials transported by containers, and a corresponding trend of miniaturization of manufactured goods; the rate of offshoring of manufactured activities to Asia and especially to China has slowed; changes in the imbalances of trade: the decelerated growth of laden container volumes in one direction leads to the lower volume of container goods, as well as to the reduced empty container handling; reduced incidence of container transshipment, as more ports are served directly. Various ports in Southeast Asia, Latin America or Africa that were previously connected mainly by feeder or relay services have attracted mainline calls as volumes increased while port facilities have been improved.

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<sup>2</sup>Alphaliner Weekly Review, Volume 2016 Issue 08

# Latin American and the Caribbean Container Port throughput, Ranking 2015

Throughput (TEU) & change 2015/2014 (%).

Ranking	Puerto/Port	País/Country	2013 (TEU)	2014 (TEU)	2015 (TEU)	Variación/change % 2015/2014
1	Santos	Brazil	3,451,123	3,569,870	3,645,448	2.1%
2	Colón	Panama	3,356,060	3,286,736	3,577,427	8.8%
3	Balboa	Panama	3,187,387	3,468,283	3,294,113	-5.0%
4	Cartagena	Colombia	1,987,864	2,236,551	2,606,945	16.6%
5	Manzanillo	Mexico	2,118,186	2,355,149	2,458,135	4.4%
6	El Callao	Peru	1,856,020	1,992,473	1,900,444	-4.6%
7	Guayaquil	Ecuador	1,519,059	1,621,381	1,764,937	8.9%
8	Kingston	Jamaica	1,703,949	1,638,113	1,653,272	0.9%
9	Buenos Aires	Argentina	1,784,800	1,428,843	1,433,053	0.3%
10	Freeport	Bahamas	1,379,296	1,400,000	1,400,000	0.0%
11	San Juan	Puerto Rico	1,269,902	1,319,961	1,210,503	-8.3%
12	San Antonio	Chile	1,196,844	1,093,625	1,170,184	7.0%
13	Limón-Moin	Costa Rica	1,053,734	1,089,518	1,108,573	1.7%
14	Lázaro Cárdenas	Mexico	1,051,183	996,654	1,068,747	7.2%
15	Veracruz	Mexico	866,966	847,370	931,613	9.9%
16	Buenaventura	Colombia	851,101	855,404	911,533	6.6%
17	Valparaíso	Chile	910,780	1,010,202	902,542	-10.7%
18	Caucedo	Dominican Rep.	1,033,311	831,375	826,935	-0.5%
19	Montevideo	Uruguay	826,962	776,558	811,297	4.5%
20	Paranaguá	Brazil	730,723	757,319	782,346	3.3%
21	Rio Grande	Brazil	626,095	678,882	726,785	7.1%
22	TUP Portonave	Brazil	673,139	676,675	662,590	-2.1%
23	Altamira	Mexico	597,760	599,357	647,369	8.0%
24	Puerto Cortes	Honduras	571,408	578,561	624,302	7.9%
25	Santo Tomas de Castilla	Guatemala	499,761	525,455	529,450	0.8%
26	TUP Itapoa	Brazil	465,323	465,665	501,523	7.7%
27	Coronel	Chile	394,070	521,527	471,426	-9.6%
28	San Vicente	Chile	453,174	475,164	456,176	-4.0%
29	TUP Chibatao	Brazil	362,710	471,753	450,544	-4.5%
30	Puerto Cabello	Venezuela	766,813	542,315	438,244	-19.2%
31	Puerto Barrios	Guatemala	389,110	379,667	432,141	13.8%
32	Haina	Dominican Rep.	307,672	344,633	417,642	21.2%
33	Suape	Brazil	395,636	418,043	398,166	-4.8%
34	Puerto Quetzal	Guatemala	322,690	358,354	389,329	8.6%
35	Itajai	Brazil	402,264	371,358	323,565	-12.9%
36	Port of Spain	Trinidad & Tobago	381,232	385,392	298,969	-22.4%
37	Rio de Janeiro	Brazil	357,350	413,644	297,991	-28.0%
38	Salvador	Brazil	273,334	280,518	283,500	1.1%
39	Mariel	Cuba	-	230,000	260,000	13.0%
40	Caldera	Costa Rica	193,095	209,061	235,268	12.5%

(see next)

41	Itaguaí /Sepetiba	Brazil	354,952	243,025	228,173	-6.1%
42	Iquique	Chile	244,565	240,823	227,099	-5.7%
43	Arica	Chile	204,174	217,817	226,893	4.2%
44	Puerto Angamos	Chile	148,973	167,266	223,124	33.4%
45	Point Lisas	Trinidad & Tobago	192,887	208,972	221,856	6.2%
46	Paita	Peru	169,662	204,555	214,483	4.9%
47	La Guaira	Venezuela	502,418	287,228	208,484	-27.4%
48	Jarry/ Pointe-a-Pitre	Guadalupe	198,142	183,922	201,948	9.8%
49	Vitória	Brazil	187,576	235,026	193,917	-17.5%
50	Ensenada	Mexico	131,054	139,938	193,424	38.2%
51	Acajutla	El Salvador	180,634	179,256	190,708	6.4%
52	TUP Pecem	Brazil	149,572	195,352	179,288	-8.2%
53	Port-au-Prince	Haití	172,516	175,307	178,452	1.8%
54	Lirquén	Chile	126,244	106,438	164,994	55.0%
55	Fort-de-France	Martinica	147,989	171,889	159,231	-7.4%
56	Barranquilla	Colombia	143,744	153,126	148,880	-2.8%
57	Corinto	Nicaragua	91,867	110,102	138,006	25.3%
58	Zárate	Argentina	180,403	129,313	125,396	-3.0%
59	TUP Super Terminais	Brazil	196,342	176,074	108,391	-38.4%
60	Nieuwe Haven	Suriname	108,020	108,703	106,014	-2.5%
61	Puerto Castilla	Honduras	96,438	97,636	103,288	5.8%
62	Santa Marta	Colombia	129,466	96,025	102,037	6.3%
63	Willemstad	Curacao	87,452	89,193	90,016	0.9%
64	Bridgetown	Barbados	74,923	78,432	86,508	10.3%
65	Philipsburg	St. Maarten	80,642	82,643	-	
66	Fortaleza	Brazil	78,256	89,230	79,808	-10.6%
67	Vila do Conde	Brazil	40,912	47,470	78,422	65.2%
68	Antofagasta	Chile	100,564	81,936	77,467	-5.5%
69	Havana	Cuba	286,238	70,836	-	
70	Progreso	Mexico	64,928	65,583	67,653	3.2%
71	São Francisco do Sul	Brazil	72,801	93,139	66,802	-28.3%
72	Ushuaia	Argentina	73,788	63,679	-	
73	Puerto Bolivar	Ecuador	46,022	49,080	60,207	22.7%
74	Esmeraldas	Ecuador	77,621	101,540	59,413	-41.5%
75	Puerto Plata	Dominican Rep.	38,454	38,972	58,410	49.9%
76	Degrad-des-Cannes	French Guiana	-	55,109	55,000	-0.2%
77	Georgetown-Caimán	Islas Caimán	49,952	50,069	54,607	9.1%
78	Georgetown	Guayana	50,991	48,735	52,834	8.4%
79	Santo Domingo	Dominican Rep.	48,757	39,529	50,398	27.5%
80	Maracaibo	Venezuela	71,202	57,001	46,371	-18.6%