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Terminal consolidation comes to Brazil

Rob Ward, Special Brazil Correspondent | Dec 08, 2017 5:43PM EST

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Brazil is a leading exporter of various fruits (melons, apples, mangoes, oranges, bananas, watermelons, grapes and papaya), chicken, beef and pork as well as coffee. Photo credit: Shutterstock.

This week's start of the 550 million reais (\$167 million) expansion of Terminal de Containeres de Paranaguá (TCP) and DP World's acquisition of 100 percent of the Empresa Brasileira de Terminais Portuários (Embraport) box terminal in Santos signals increasing marine terminal consolidation in Brazil.

"I don't think shippers are fully aware of what is going on with the concentration of liner services and the concentration of terminals," said Robert Grantham, a director with the Solve Shipping consultancy based in Navegantes.

"Shippers don't realize that their options are rapidly becoming very limited and this will eventually have an impact on prices. If there is just one shipping line calling at certain routes on a certain route, that line will be charging a premium for that."

Brazilian terminal operators have slowly been squeezed out of the market as international players such as China Merchants Port Holdings, which has 90 percent of TCP, and DP World break into Brazil. Additionally, the terminal operating arms of CMA CGM, Mediterranean Shipping Co., and Maersk Line have also been buying into the market to generate synergies between the sister units.

"In terms of Brazilian ownership of port terminals, I guess it was inevitable that would decline once the shipping lines saw Brazilian terminals as strategically important," Grantham said. "It was only a matter of time before they started buying into them. It certainly shows how important they see Brazil, especially its role as a world supplier of food. This is especially important for Chinese interests as it guarantees their supply of food."

[Brazil is a leading exporter of various fruits \(https://www.joc.com/maritime-news/trade-lanes/europe-south-america/strong-fruit-exports-keep-brazil-europe-rates-elevated-20171117.html\)](https://www.joc.com/maritime-news/trade-lanes/europe-south-america/strong-fruit-exports-keep-brazil-europe-rates-elevated-20171117.html) (melons, apples, mangoes, oranges, bananas, watermelons, grapes, and papaya), chicken, beef, and pork as well as coffee.

Although there are concerns about increasing consolidation in the Brazilian port sector, shippers also see an

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upside in the infrastructure and capacity upgrades these international terminal operators provide.

TCP, which with 125,000 TEU of chicken forecast for this year is vying with the Itajai Port Complex for the title of “chicken export capital of the world (https://www.joc.com/port-news/south-american-ports/brazil-poultry-shippers-flap-over-itajai-port-closure_20170602.html)”, is a good example of this.

Chicken shippers using TCP were pleased to hear of the refrigerated capacity expansion taking place there.

The expansion of TCP is vital for it to remain a key player in the increasingly competitive market, said TCP president Luiz Alves.

“Compared to ten years ago, there has been a decrease in the number of terminals despite the fact that the market has grown but those left are having to become much more efficient,” Alves told *Valor Economico*.

TCP’s annual capacity will increase to 2.5 million TEU from 1.5 million TEU, as the quay is expanded 220 meters (722 feet) to 1,099 meters and the yard increases to 500,000 square meters (5.4 million square feet) from 330,000 square meters

At Emraport, very little will change in the short term, according to industry sources, which said that beef exporters such as JBS, BRF Food, and Minerva will be among the main beneficiaries of the new ownership. Emraport is forecast to handle 650,000 TEU this year.

One change will be new management, which sources say will take place sometime in January. Emraport will also change its name to DP World Santos.

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