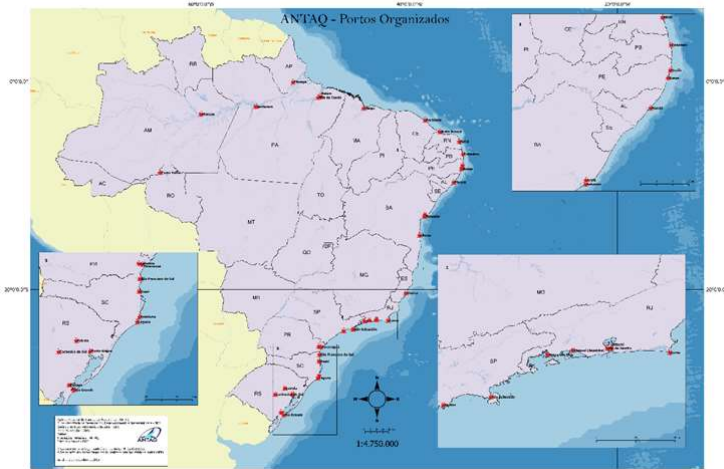


BRAZIL: BUSINESS OPPORTUNITIES IN THE MARITIME SECTOR



- Total of 250 port installations around the country: 35 public ports and 215 private port facilities (TUP's).
- International trade: 95% through ports.
- Legislation, main law: The Port Act (Law no 12,815/2013) and its Decree no 8,033/2013
- Market study about Brazilian ports available at: [https://www.rvo.nl/sites/default/files/2020/09/Ports Sector in Brazil Sept 2020.pdf](https://www.rvo.nl/sites/default/files/2020/09/Ports_Sector_in_Brazil_Sept_2020.pdf)
- Concession and privatization projects of Brazilian ports and port terminals available at: <https://www.ppi.gov.br/ppi-english>

1. Main ports in Brazil

Although most Brazilian ports are located at the country's extensive coastline, there are also deep-sea ports located at large navigable rivers, such as the Amazonas and Madeira rivers, located respectively in the Amazonas (AM) and Rondônia (RO) States, as well as at the Lagoa dos Patos, a lagoon in the State of Rio Grande do Sul (RS). The five main Brazilian port complexes are:

Port Complex of Santos

The Santos port complex is the most important in the country, representing more than 27% of the total goods in terms of value, when all foreign trade movements are considered. When measured in volume (ton), Santos handles almost 50% of the agribusiness bulk cargo and 40% of the total containers in the country.

Port Complex of Paranaguá/Antonina and Porto Pontal

The Paranaguá port complex is the second most important hub for agribusiness and container cargo exports and the main port for fertilizer imports. Located in the Southeast region of the country, it has rail and road access connecting the grain and sugar production zones of the States of Paraná (PR), Mato Grosso do Sul (MS) and São Paulo (SP), as well as the production from eastern Paraguay.

Port Complex of Itaguaí

The port complex of Itaguaí, in the south of the State of Rio de Janeiro (RJ), consists of the public port of Itaguaí and several private use terminals (TUPs) that handle bulk minerals.

Port Complex of Rio Grande

The port complex of Rio Grande, located in the very south of the country in the State of Rio Grande do Sul (RS), is characterized by the agribusiness cargoes handling from the southern region of Brazil and by the handling of fuels, fertilizers and containerized cargo.

2. Trends

- The Brazilian port system has been expanding its capacity to meet the growing demand for port services and equipment with the implementation of new private terminals and leasing of terminals in public ports and port terminals.
- The Brazilian Government has structured a program to coordinate and implement the auctions for infrastructure concession: the Investment Partnership Program (PPI). This program includes projects for the privatization and concession of ports, railways, highways, airports, energy and oil fields.

- The PPI is also conducting the concession or privatization of port authorities; 7 companies under the direct management of the Brazilian Federal Government, and 14 other companies delegated to state or municipality governments.

3. Main business opportunities for the Dutch port & maritime sector

- Participation and investment in leased terminals in public ports and in private terminals, as well as in the privatization or concession of port authorities.
- Public ports need investments, equipment and services to improve their operational standards, such as dredging, traffic control of ships, trucks and rail traffic, increasing capacity in infrastructure, technology to improve and innovate port management activities and customs processes.
- Secondary acquisitions of existing terminals (leased and private) and implementing Private Use Terminals (TUP's).
- Other opportunities, such as:
 - Port and terminal development & management.
 - Vessel Traffic Management and Information System (VTMIS).
 - R&D in projects promoting innovative and sustainable solutions for port services.
 - Block chain technology in cargo information management.
 - Smart software IT solutions for integration and security.
 - Cyber-security technologies for drug traffic control and drug detection systems.
 - Educational port programs with the Brazilian governmental institutes and private sector & partnerships between Dutch and Brazilian Universities.

4. Main stakeholders

- Ministry of Infrastructure - National Secretariat of Ports and Waterway Transportation
- Special Secretariat of the Investment Partnership Program (SPPI)
- National Agency for Waterway Transportation (ANTAQ)
- National Land Transport Agency (ANTT) for issues related to multimodal transport
- National Confederation of Transport (CNT)
- National Federation of the Maritime Navigation Agencies (Fenamar)
- Brazilian Association of Port Terminals (ABTP)

For more information, please enter in contact with Jörgen Leeuwestein, Senior Trade Officer at the Embassy in Brasilia: jorgen.leeuwestein@minbuza.nl.