



CSA 53rd Annual General Meeting



Challenges and Opportunities for Small Island Developing States (SIDS) in Caribbean Shipping – A Port Perspective

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#OAS_CIP #OEA_CIP

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OAS Inter-American Committee on Ports (CIP)

1. Political Dialogue



Strengthen Inter-American port dialogue as the only **permanent inter-governmental forum** at the highest level.

2. Capacity Building



Promote and enhance management and **technical capabilities** of port officials and personnel.

3. Technical Assistance



Assist Member States on port matters or **specific projects** upon request and in line with CIP-OAS mandates.

4. Private Sector Collaboration



Promote **win - win partnerships** with private sector to foster **strategic alliances** among relevant port stakeholders.



CIP Member States

1. Antigua & Barbuda
2. Argentina
3. Bahamas
4. Barbados
5. Belize
6. Bolivia
7. Brazil
8. Canada
9. Chile
10. Colombia
11. Costa Rica
12. Cuba
13. Dominica
14. Ecuador
15. El Salvador
16. Granada
17. Guatemala
18. Guyana



19. Haiti
20. Honduras
21. Jamaica
22. Mexico
23. Nicaragua
24. Panama
25. Paraguay
26. Peru
27. Dominican Republic
28. St. Kitts and Nevis
29. St. Lucia
30. St. Vincent & the Grenadines
31. Suriname
32. Trinidad & Tobago
33. United States
34. Uruguay
35. Venezuela

CIP Structure & Priority Areas



CIP Associate Members & Strategic Partners



OAS

More rights for more people.



CIP

Inter-American
Committee on Ports



AMANAE



Hudson Analytix
Complexity made simple.

North American Marine Environment Protection Association



Puertos del Estado



GOBIERNO
DE ESPAÑA

MINISTERIO
DE FOMENTO



WORLD
MARITIME
UNIVERSITY



Caribbean Marine Environment Protection Association



PIEDROBA
CONSULTING GROUP



Puerto Bahía



BUSAN
PORT AUTHORITY



SLOM
Sociedad Latinoamericana de
Operadores de Terminales
Marítimo Petroleros y Monoboyas



INTERNATIONAL
MARITIME
ORGANIZATION



MULTIMODAL
EMPRESA



AAPA
ESSENTIAL. RESILIENT. UNITED.
LOS PUERTOS CREAN RIQUEZA
OS PORTOS CRIAM RIQUEZA



THE SHIPPING
ASSOCIATION
OF JAMAICA



MAERSK



CSA
CARIBBEAN SHIPPING ASSOCIATION



PORT MANAGEMENT ASSOCIATION
OF THE CARIBBEAN

PUERTO
BUENOS AIRES

Ministerio
de Transporte



PORT MANAGEMENT ASSOCIATION
OF THE CARIBBEAN



CDEMA
CARIBBEAN
DISASTER EMERGENCY
MANAGEMENT AGENCY
Resilient States - Safer Lives



Asociación Internacional de
Profesionales de Puertos y Costas



Consorcio de Gestión
del Puerto de Dock Sud



UNITED NATIONS
UNCTAD



ALANZA



TOTAL MARINE
SOLUTIONS



Consorcio de Gestión
del Puerto de Dock Sud



Centro de Navegación



UNIVERSITY
OF MIAMI





OAS

More rights for more people



CIP

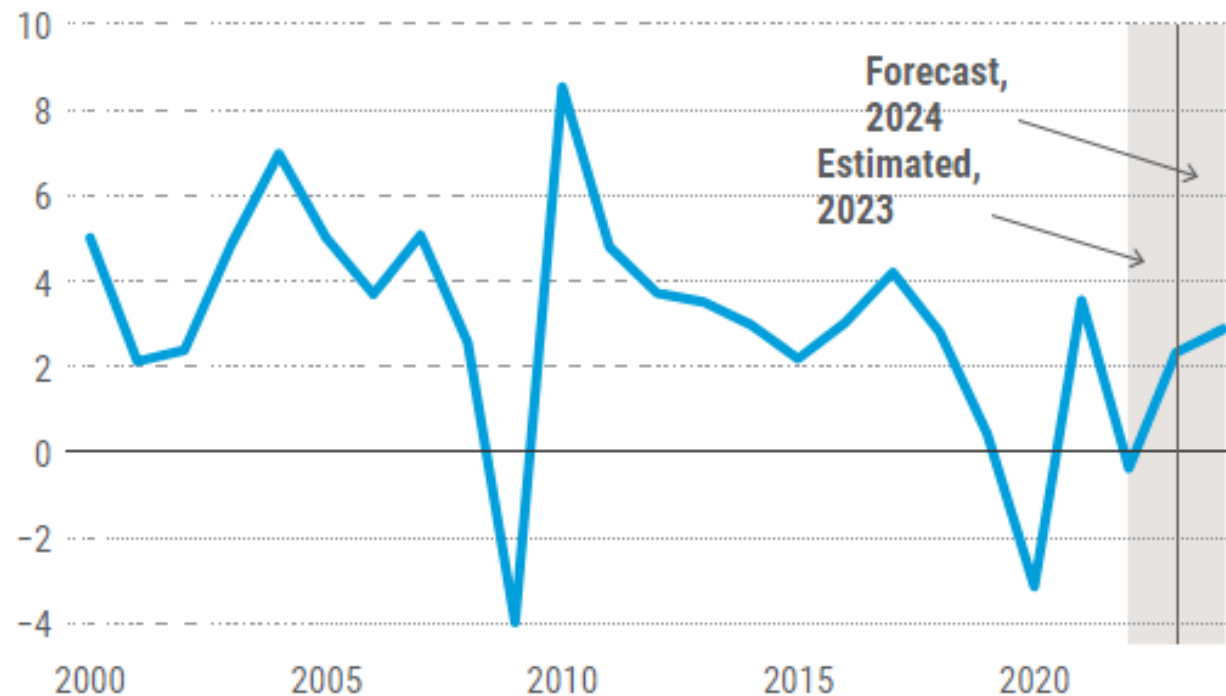
Inter-American
Committee on Ports



Challenges and Opportunities for Small Island Developing States (SIDS) in Caribbean Shipping – A Port Perspective

Global Maritime Trade

Seaborne trade growth, tons and ton-miles, percentage annual change, 2000– 2024

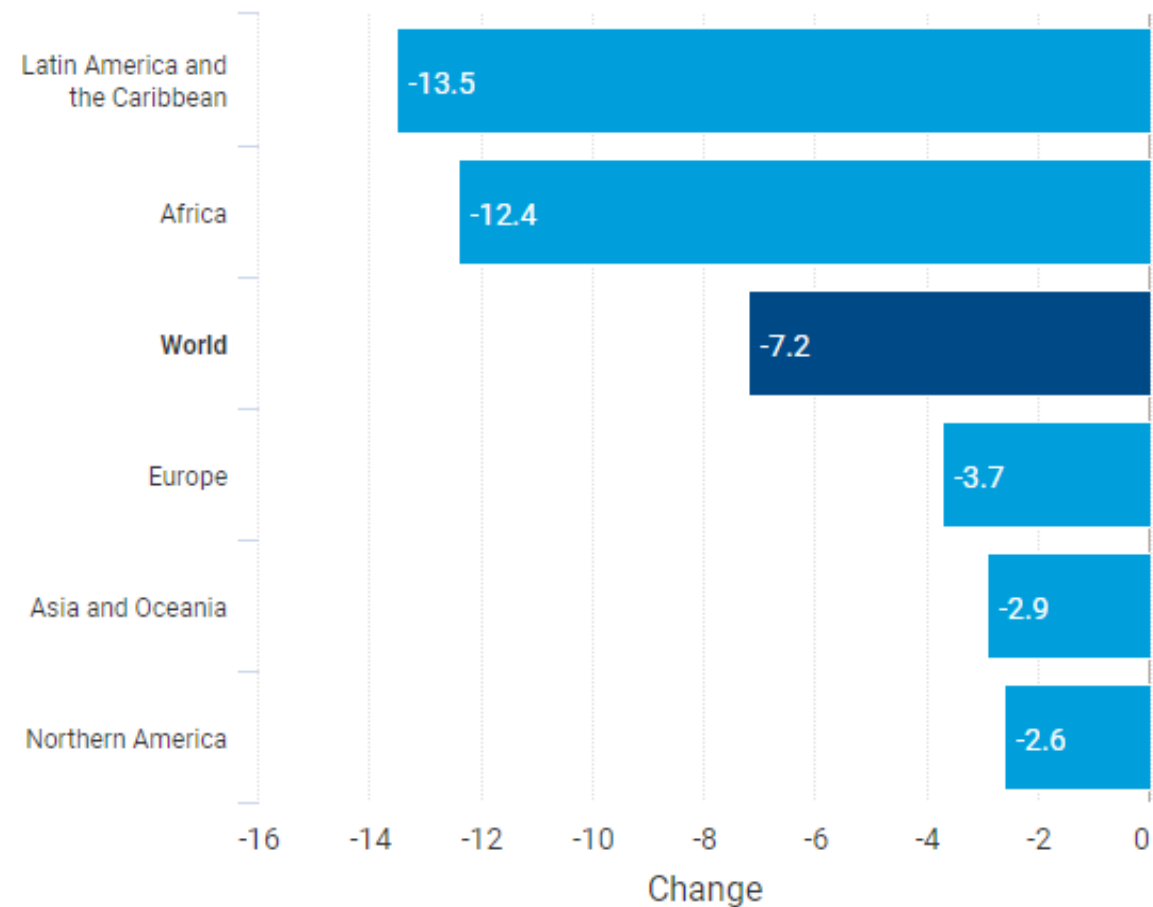


Note: The data for 2023 are estimates and for 2024 are forecasts.

Source: UNCTAD secretariat, based on Clarksons Research, Shipping Intelligence Network timeseries (as of July 2023) • [Get the data](#) • [Download image](#)

Port Traffic by Region

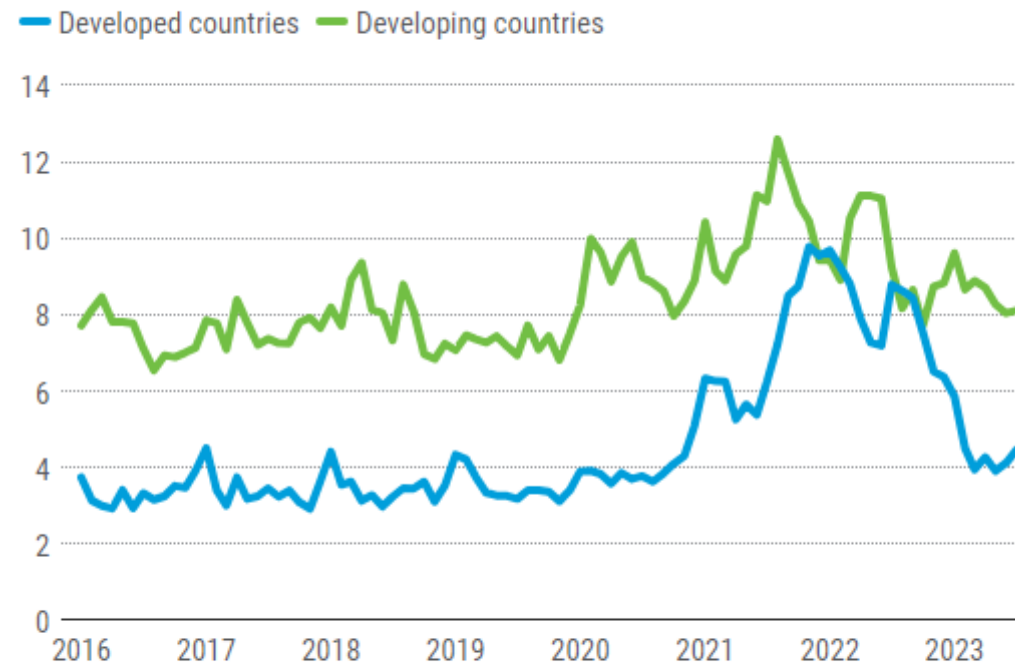
Changes in number of direct calls by region, third quarter 2020–second quarter 2022, per cent



Source: UNCTAD, based on data provided by MDS Transmodal.

Average waiting times of container ships at port

Average waiting times of container ships at port in hours,
monthly, January 2016–July 2023



Note: The waiting time is estimated based on the time between when a vessel first enters an anchorage associated with a port group (or a port where the vessel has not been seen in an anchorage shape), and when it first enters a berth within a port.

Source: UNCTAD, based on data provided by Clarksons Research, 2023 • [Get the data](#) • [Download image](#)

Top-25 Wider-Caribbean Ports

Port area	Rank 2010	Rank 2019	Rank 2022
Panama Caribbean (all terminals)	1	1	1
Panama Pacific (all terminals)	2	3	2
Cartagena Bay, Colombia	4	2	3
Kingston, Jamaica	3	4	4
Freeport, Bahamas	6	6	5
Caucedo, DR	5	8	6
San Juan, Puerto Rico	7	5	7
Limon-Moin, Costa Rica	8	7	8
Puerto Cortes, Honduras	9	9	9
Santo Tomas de Castilla, Guatemala	10	10	10
Haina, DR	12	12	11

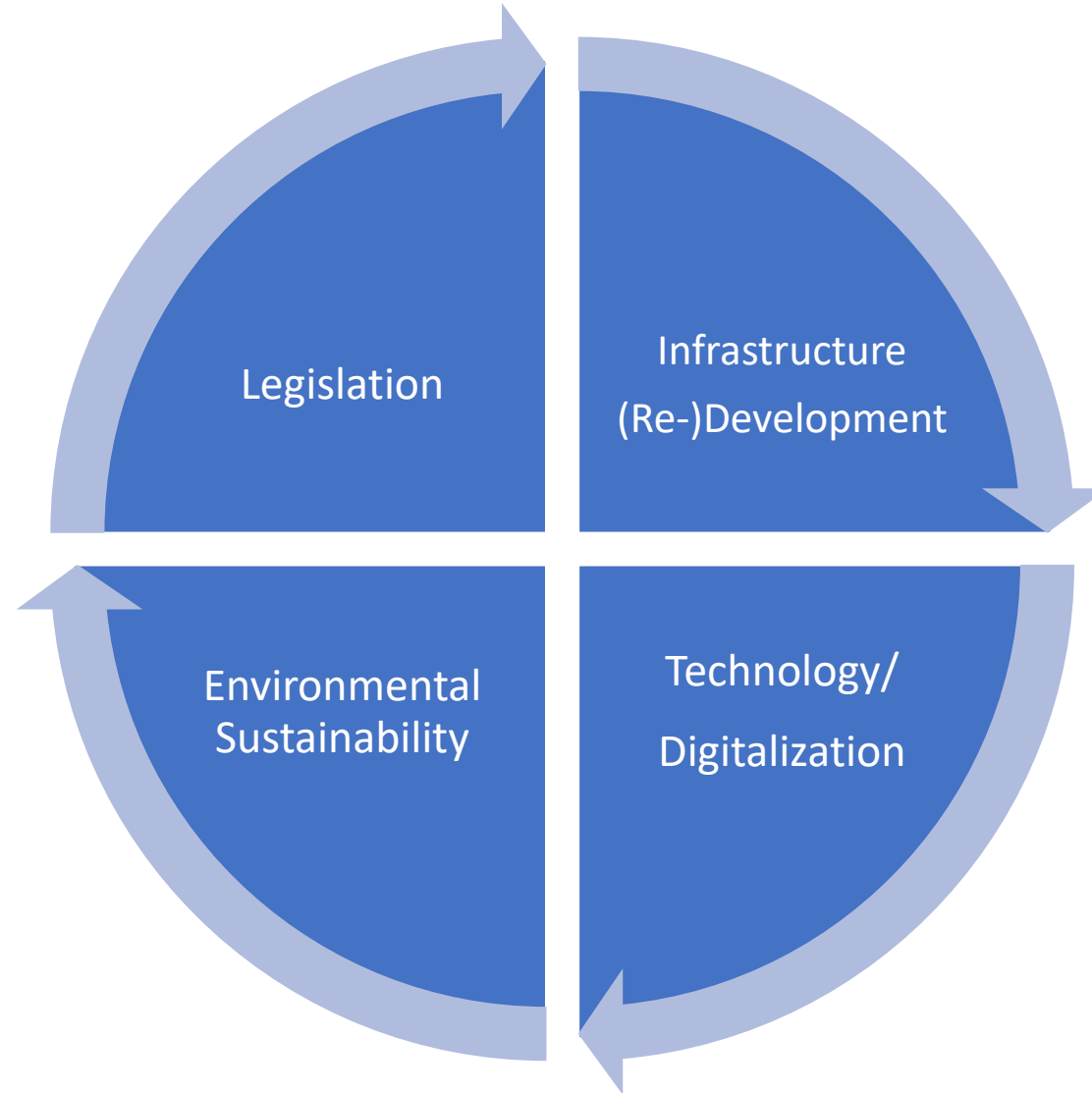
Port area	Rank 2010	Rank 2019	Rank 2022
Puerto Barrios, Guatemala	13	11	12
Port of Spain, T&T	11	13	13
Santa Marta, Colombia	19	14	14
Jarry/Point-a-Pitre, Guadeloupe	17	15	15
Point Lisas, T&T	14	17	16
Port-au-Prince, Haiti	15	18	18
Fort-de-France, Martinique	16	16	17
Barranquilla, Colombia	18	19	19
Puerto Castilla, Honduras	21	20	20
Bridgetown, Barbados	22	21	21
Willemstad, Curacao	20	22	22
Bocas Fruit, Panama	23	23	23
Barcadera, Oranjestad, Aruba	25	24	24
Campden Park, SVG	24	25	25

Source: CSA in Port Economics

Transshipment – Wider-Caribbean

	Hub? (transshipment / throughput)				
	2019	2020	2021	2022	Avg 19/22
Panama Caribbean (all terminals)	87%	90%	89%	88%	89%
Panama Pacific (all terminals)	90%	93%	92%	90%	91%
Cartagena Bay, Colombia	72%	73%	74%	74%	73%
Kingston, Jamaica	81%	83%	85%	85%	83%
Freeport, Bahamas	90%	88%	90%	88%	89%
Caucedo, DR	55%	56%	62%	51%	56%
Limon-Moin, Costa Rica	2%	3%	3%	4%	3%
Santo Tomas de Castilla, Guatemala	4%	1%	5%	4%	3%
Haina, DR	7%	8%	0%	10%	6%
Puerto Barrios, Guatemala	9%	10%	21%	20%	16%
Port of Spain, T&T	40%	36%	46%	50%	43%
Santa Marta, Colombia	18%	24%	23%	10%	19%
Point Lisas, T&T	9%	9%	8%	22%	12%
Fort-de-France, Martinique	17%	9%	11%	12%	12%
Barranquilla, Colombia	0%	0%	0%	6%	2%
Bocas Fruit, Panama	0%	17%	48%	40%	29%
Barcadera, Oranjestad, Aruba	1%	1%	1%	1%	1%

Port Trends and Challenges in SIDS





Infrastructure (Re-)Development



US\$90 million



US\$250.8 million

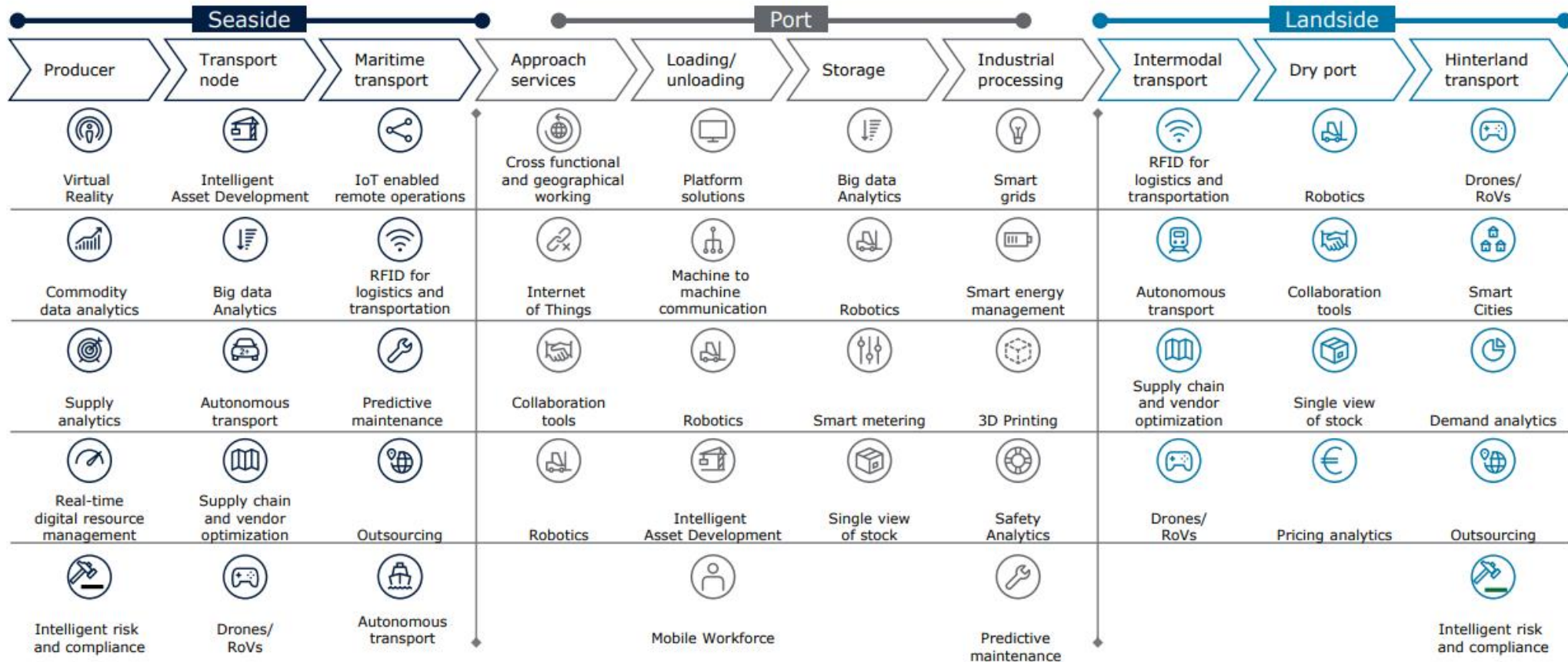


**US\$1.5 million technical cooperation
deal with IDB to structure the port
expansion-PPP**

Technology/Digitalization

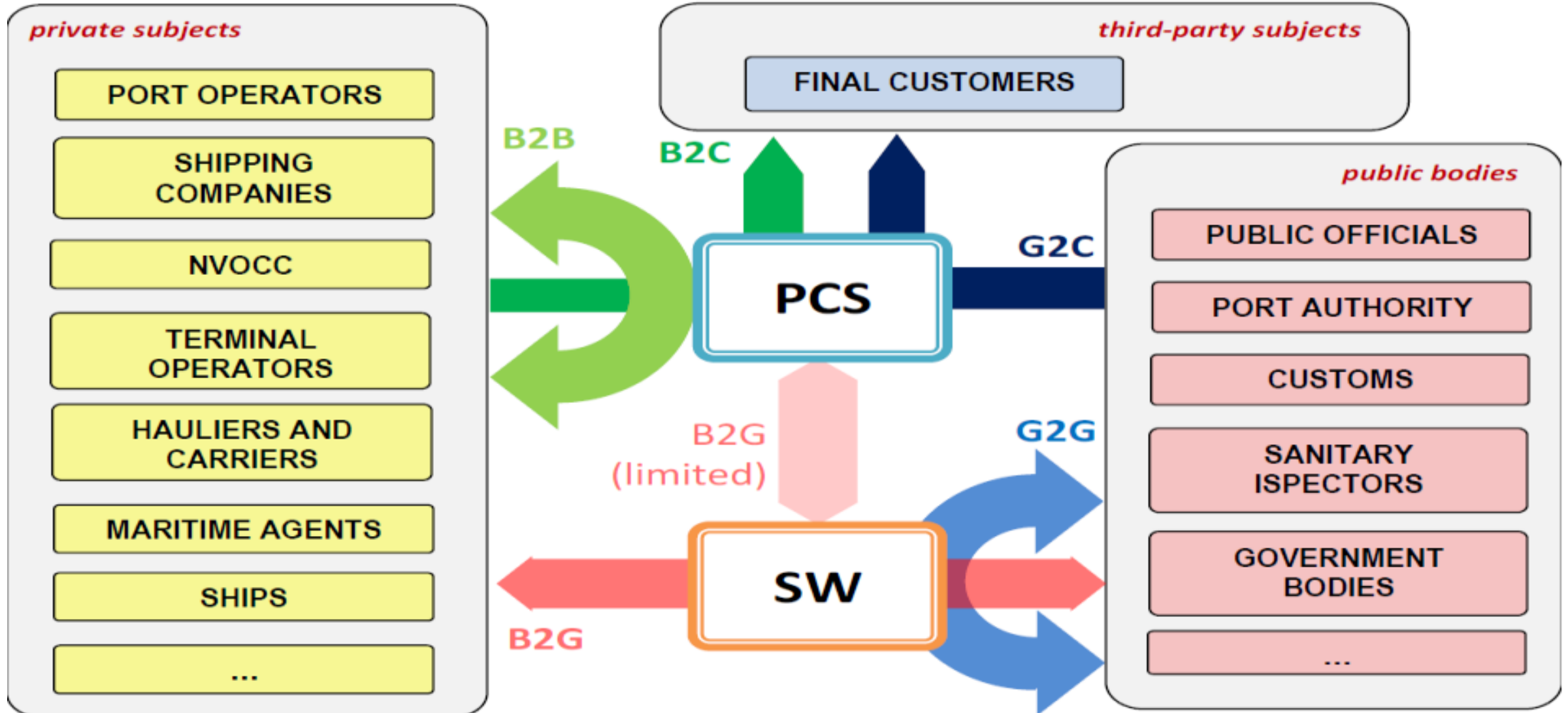
Technological drivers | Increase in innovations

Ports are increasingly implementing innovations in the entire value chain with a wide range of used technologies



Note: Non exhaustive Source: Monitor Deloitte – Deloitte Port Advisory

Technology/Digitalization cont.





Environmental Sustainability

Increased Environmentally Motivated Regulations

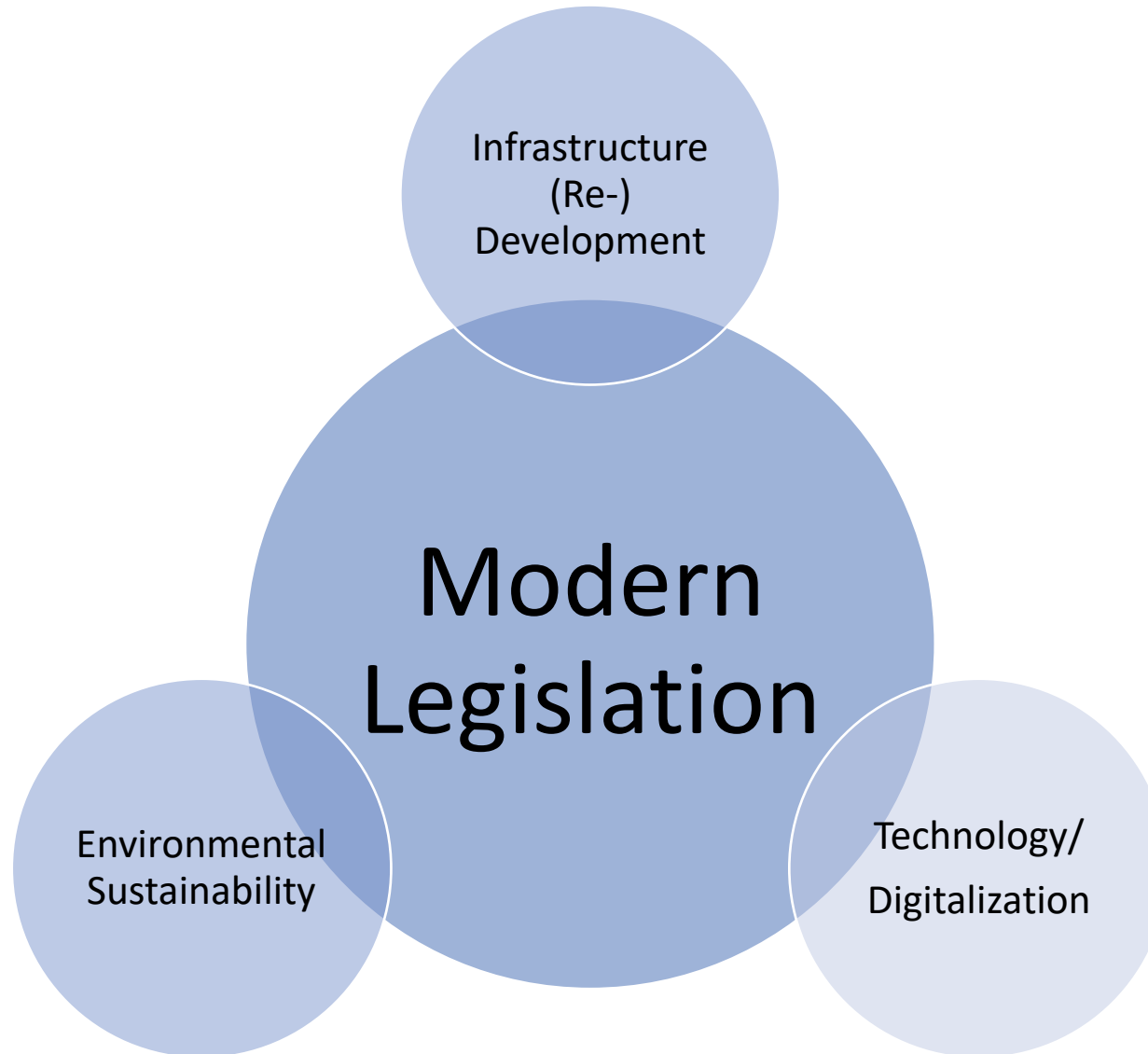
New Competitive Advantages for Ports

Environmental and Social Sustainability

Improved Economic Efficiency and Resilience for Ports



Legislation





Takeaways



Infrastructure development and investments aligned with capacity building and training needs



Human Resource = Biggest asset



Stakeholder collaboration to boost **technology and digitalization**;



Change management vs. Use of software



Environmental and social sustainability improve economic efficiency and resilience



Updated national port legislation lays the foundation for port modernization



THANK YOU!

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