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TECHNICAL ADVISORY GROUP ON

LOGISTICS, INNOVATION & COMPETITIVENESS



MESSAGE

FROM THE CHAIR OF THE TECHNICAL ADVISORY GROUP (TAG) ON LOGISTICS, INNOVATION AND COMPETITIVENESS

It is an honor for Mexico, in its capacity as Chair of the Technical Advisory Group (TAG) on Logistics, Innovation, and Competitiveness of the CIP-OAS, to share with you a space that reflects the progress achieved thanks to dialogue and cooperation between port authorities, associate members, and strategic actors in the hemispheric port community.

Guided by the Roatan Action Plan and working closely with the Vice Chair of the United States, this Group has established itself as a technical forum for promoting initiatives that strengthen innovation, productivity, and competitiveness in ports and throughout the logistics chain.

This first issue of the TAG's bulletin on Competitiveness, Innovation, and Logistics is the result of a collective effort, demonstrating the importance of maintaining close and sustained collaboration, which allows us to share best practices, identify areas for improvement, and move toward a more integrated, efficient, and competitive region in terms of port operations.

Cap. Alt. Manuel Fernando Gutiérrez Gallardo
Coordinator General of Ports and Merchant Marine
Secretariat of the Navy
Mexico



INTRODUCTION

*Welcome to the first bulletin of the
Technical Advisory Group on Logistics,
Innovation, and Competitiveness!*

Let us explore together the advances and experiences that mark the path toward more modern, efficient, and competitive ports, for the benefit of our port communities and the development of our region.



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PORT OF MANZANILLO

Manzanillo: Mexico's strategic port platform and driver of logistics transformation in Latin America

Within the framework of the **National Maritime Policy**, the Secretariat of the Navy is promoting a comprehensive transformation of the National Port System (SPN), with the Port of Manzanillo as a key hub to consolidate the country's logistics infrastructure and strengthen its global competitiveness.

Located in the state of **Colima**, Manzanillo is currently the most dynamic port in the country and the national **leader in containerized cargo movement**.

Thanks to its strategic position, it primarily serves the Central and Bajío regions, which account for more than 67% of the national GDP and 55% of the population.

It efficiently connects Mexico to markets in the Americas, Asia, Europe, and Oceania.



Port of Manzanillo (San Pedrito); in the background, New Port of Manzanillo (Laguna de Cuyutlán). Courtesy: Manzanillo National Port System Administration.

Looking to the future, the ambitious **Manzanillo Cuyutlán** project is being developed in the Cuyutlán Lagoon, representing a major investment in port infrastructure. This **new port complex will include the construction of seven terminals**: five specialized container terminals, one hydrocarbon terminal, and one storage and distribution terminal, in addition to common-use areas, elevated viaducts, internal roads, and railways.

Dredging will achieve a **draft of 17 meters**, allowing the arrival of deep-draft vessels. The project aims to double cargo handling capacity from 3.9 million to over **8 million TEUs**, making it a regional benchmark in the maritime-port sector.

At the same time, in the **San Pedrito** area, plans include the construction of a **pier** and **fishing dock**, further strengthening the existing port infrastructure.



Innovation, technology, and sustainability

Manzanillo is emerging as a leader in technological innovation with the implementation of the **Secure Smart Port System (PIS)**, an internationally recognized platform with the **2022 Maritime Award of the Americas in Cybersecurity in Ports and/or Terminals** by the CIP-OAS.

This tool, designed to meet the needs of the National Port System, standardizes processes and ensures efficient, secure, and modern operations.



Courtesy: Manzanillo National Port System Administration.

A multimodal platform with a vision for the future

With 24 berths, 14 operating companies, more than 450 hectares of surface area, and a dynamic capacity of 4.3 million TEUs, Manzanillo is now a comprehensive logistics platform ready to make a historic leap in efficiency and connectivity. Investment in the port continues to attract major companies specializing in the construction and operation of container terminals.

The New Port of Manzanillo not only strengthens national port infrastructure but also positions itself as a key node in global supply chains, making a decisive contribution to the consolidation of nearshoring in Mexico. 🚢



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NATIONAL PORT COMMISSION

Competitive, Safe, and Trade-Facilitating Ports of Guatemala



Santo Tomás de Castilla National Port Company.

The country is making steady progress toward the modernization of its national port system. In recent months, key actions have been consolidated that reaffirm Guatemala's commitment to competitiveness, safety, and trade facilitation, strengthening its role as a strategic platform in international commerce.

With its sights set on the future of maritime trade, Guatemala, under the guidance of the Office of the President, has taken major steps, such as the Letter of Acceptance for the Puerto Quetzal Modernization Project. The signing took place on May 22, 2025, presided

over by the President of the Republic, Dr. Bernardo Arévalo. This marked the official start of a strategic alliance between the Guatemalan Army and the U.S. Army Corps of Engineers, ushering in a new era for the development of the Pacific coast's port infrastructure.

Meanwhile, in March of this year, the Santo Tomás de Castilla National Port Company carried out dredging maintenance in the maneuvering basin and commercial dock. This intervention significantly improves the operational conditions of this Atlantic terminal, enhancing its efficiency and competitiveness through strategic actions.

These developments are complemented by a historic milestone for Guatemala's port system: in 2024, for the first time, **the country surpassed the one-million-container mark**, reaching a total of **1,912,340 TEUs**.

This achievement makes Guatemala the first Central American country, excluding Panama, to reach this volume of cargo movement, representing a **5% increase** compared to the previous year. These and other figures were published by the **National Port Commission in its 2024 Port Statistics Report**.



Signing of the Letter of Acceptance for the Puerto Quetzal Modernization Project. May 2025.



The National Port Commission continues to enhance access to strategic information through its digital publication “**Boletín Puertos GT**”. This monthly bulletin presents summarized and comparative data on the national port system, such as cargo movement, container throughput, and vessel traffic.

In terms of training, the virtual platform has been strengthened and the “**After Office Portuario**” webinar series has been launched, offering a space for dialogue with experts in the port sector. From January to July 2025, over 2,400 individuals involved in ports and logistics environments have received training through these initiatives.

With these actions, Guatemala continues to consolidate a national strategic vision, which began in 2024 with the issuance of Decree Number 26-2024, the Law on the Designated Authority of the National Port System, a technical law focused primarily on port protection and security. In 2025, in compliance with this decree, the President of the Republic submitted to Congress the **proposed General Law of the National Port System**, aimed at modernizing and strengthening the country's port system. ⚓

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EL SALVADOR MARITIME AUTHORITY

Activities that improve logistical performance and operational efficiency

In El Salvador, port operators and maritime terminals are currently engaged in a process of modernization and logistical innovation that encompasses the country's main ports: the **Port of Acajutla and the Port of La Unión Centroamericana**. This process has gained momentum with the incorporation of the mixed-economy company Unión Portuaria del Pacífico S.E.M. de C.V., a partnership between the Turkish company Yilport Holding and the Comisión Ejecutiva Portuaria Autónoma (CEPA).

As part of this strategic alliance, projects have been launched focusing on the acquisition of port equipment, as well as the rehabilitation and modernization of key areas to strengthen logistics infrastructure and improve the competitiveness of El Salvador's maritime trade. Since January 2025, the Port of La Unión Centroamericana has reactivated its operations focused on handling Ro-Ro (roll-on/roll-off) cargo, specifically vehicles.

Between January and July of this year, eight car carrier vessels have been serviced, moving more than 4,000 vehicles, according to official reports.

This level of activity positions the port as a growing logistics hub for automotive imports, complementing its traditional operations of general cargo and fertilizers, and consolidating its strategic role as an engine of economic development in the eastern region of the country.





Successful practices

The Coast Guard Service, in its role as Maritime Authority, is responsible for monitoring, supervising, and overseeing all operational activities carried out in El Salvador's ports and maritime terminals, with particular attention to operational safety and the protection and conservation of the marine environment.

Among its core functions is the supervision of port operations, ensuring compliance with the technical and operational standards that govern the infrastructure and functioning of port facilities.

These actions are carried out in accordance with the Navigation Law and its regulations, contributing to the maintenance of high standards of safety and logistical efficiency within El Salvador's port system.

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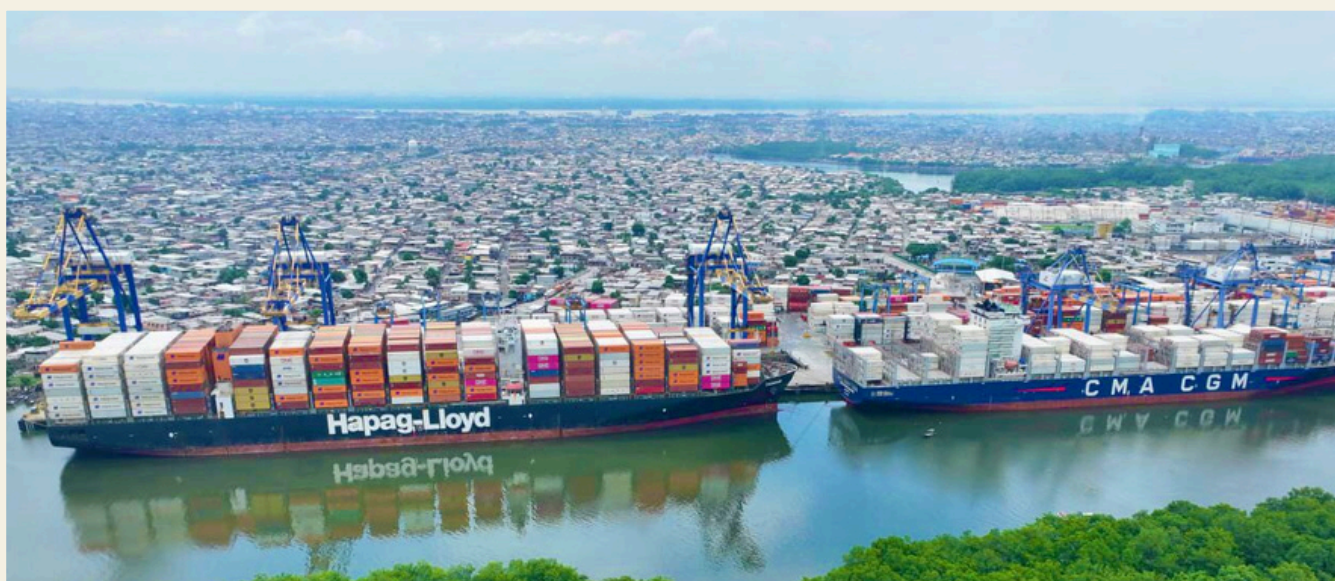
GUAYAQUIL PORT TERMINAL

TPG Celebrates 19 years driving the competitiveness and sustainability of Ecuador's foreign trade

On July 4, the Guayaquil Port Terminal (TPG) celebrated 19 years of strengthening the competitiveness of Ecuador's foreign trade, thanks to its infrastructure, operational efficiency, and commitment to sustainability.

With **five STS cranes and more than 2,000 plugs for refrigerated containers**, it enables the continuous export of strategic products such as bananas, shrimp, tuna, cocoa, broccoli, and plantains to destinations including China, the United States, Chile, Argentina, and Italy.

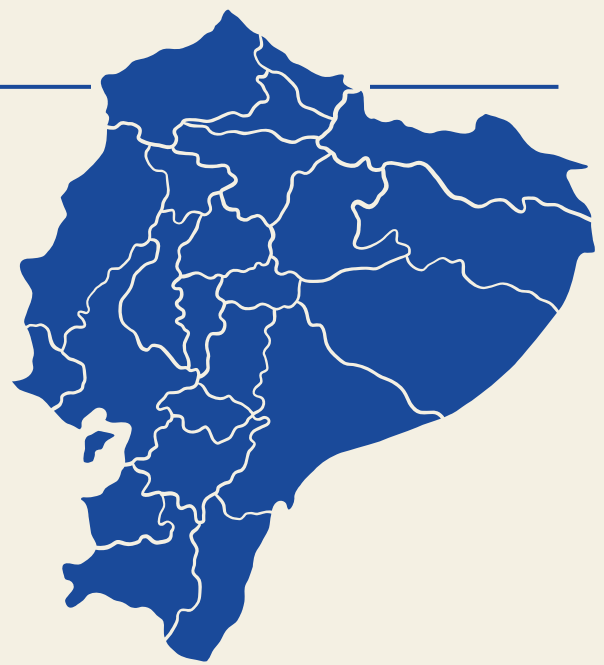
Its capacity to handle deep-draft vessels and its incorporation of advanced technologies have made TPG a key logistics hub for major international shipping lines. In addition to boosting exports, it facilitates the importation of supplies and goods that support strategic sectors such as commerce, the food industry, construction, chemicals, metallurgy, plastics, automotive, agriculture, livestock, and fisheries.



As part of its automation plan, TPG implemented a new operating system that optimizes planning and real-time operational control, improving traceability and reducing time and logistics costs.

In environmental matters, the terminal maintains a strong commitment to reducing its carbon footprint. The incorporation of four hybrid HRTG cranes has enabled a 70% reduction in fuel consumption, lower emissions, and decreased noise pollution. These cranes also operate with intelligent sensors that enhance safety and efficiency.

Aligned with this sustainability approach, TPG was recently certified as a carbon-neutral organization under standards ISO 14064-1:2018 and ISO 14068-1:2023, through a process validated by SGS Ecuador, which included optimizing energy consumption and offsetting emissions through Certified Emission Reductions (CERs).



Additionally, the terminal incorporated three state-of-the-art scanners that allow for non-intrusive inspection of 100% of export containers, strengthening the security and reliability of its operations.

Through innovation, process automation, and continuous equipment renewal, TPG reaffirms its commitment to investing in world-class infrastructure to continue enhancing foreign trade competitiveness, generating development and new opportunities for the country. 



NATIONAL ADMINISTRATION OF NAVIGATION AND PORTS PARAGUAY

INNOVATION AND LOGISTICS IN SERVICE OF PARAGUAY'S INLAND WATERWAY DEVELOPMENT

The National Administration of Navigation and Ports (ANNP), under its strategic guidelines for logistical modernization and technological innovation, has begun implementing an advanced river monitoring system, positioning itself as a regional benchmark in the efficient management of inland waterways.

With the progressive installation of Base Stations for Transmitting and Receiving AIS (Automatic Identification System) signals along the Paraguay River, the ANNP is expanding its capacity to observe, in real time, navigation on both the Paraguay and Paraná Rivers. This system allows for the identification of vessels, their routes, speed, draft, cargo, port of origin, and destination, creating a robust platform for strategic decision-making in port logistics and traffic control.

Complementing this innovation, the placement of buoys equipped with AIS ATONs (Aids to Navigation) represents a qualitative leap in safety conditions. These electronic aids allow navigators to detect conflict zones through their onboard systems, reducing risks and significantly increasing safe operating hours per day and annual waterway availability. Additionally, ANNP has begun installing interconnected automatic hydrometers to complement the conventional ones. These devices provide precise, real-time data on river levels at various strategic points. This network strengthens cargo planning and ensures greater use of navigability capacity throughout the year, dynamically adapting to hydrological conditions.

Regional competitiveness and best practices

These actions align with international best practices adopted by leading port authorities, such as the Panama Canal Authority and the Rhine Waterways Administration, both of which implemented AIS systems and smart buoys to optimize routes, reduce waiting times, and minimize operational risks.

The implementation of these technologies by ANNP not only strengthens safety and logistical efficiency but also increases the country's competitiveness in foreign trade by enabling more reliable cargo transit through the Paraguay-Paraná Waterway corridor.

Commitment to Paraguay's logistical future

In this way, the ANNP reaffirms its commitment to the sustainable development of the country, integrating cutting-edge technology, successful practices, and a strategic vision that places inland navigation at the heart of the national economy. This comprehensive approach contributes to strengthening logistical infrastructure, encourages investment, and promotes greater integration of Paraguay into global markets. ⚓



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DP WORLD EN ECUADOR

The deepwater port in Posorja moves forward steadily with dock expansion



Looking to the future, DP World is steadily moving forward with the **expansion of the dock at the Deepwater Port in Posorja**, which includes the construction of an additional 232.5 meters of dock. This expansion will bring the **total length to 700 meters**, enabling the terminal to increase its capacity to simultaneously receive and service up to two fully loaded post-Panamax vessels.

As part of this strategic growth, the terminal will incorporate **state-of-the-art port equipment**, including two gantry cranes, three RTG cranes, and other modern machinery, with the goal of enhancing operational efficiency and providing greater flexibility for handling fresh, frozen,

manufactured goods, raw materials, and other key products that are essential to the country's trade balance.

This project represents a **100% private investment of approximately USD \$140 million**, and during construction, it will generate hundreds of direct and indirect jobs, fostering economic growth in the terminal's surrounding area.

This investment adds to the USD \$500 million already invested privately under the **greenfield model** for the construction from scratch of a modern port terminal, a 21-kilometer access road, and an exclusive maritime access channel for deep-draft vessels.



The Deepwater Port of Posorja is a clear example of the success of Public-Private Partnerships (PPPs), where collaboration between the public and private sectors drives national progress. In fact, the terminal received the **AAPA-CIP 2025 Port Industry Award of Excellence**, a prestigious honor recognizing ports in the region for their operational performance and impact on economic and social development.

The expansion of the dock will further strengthen the strategic role of the Deepwater Port of Posorja in **handling transshipment** cargo, which has seen increased demand due to global maritime logistics challenges. As such, Posorja and Ecuador will continue to benefit from the terminal's strategic location and proximity to other countries in the region. This will also be reinforced by international treaties and agreements promoted by the Ecuadorian government.

Today, the Port of Posorja is consolidated as the **leading terminal in Ecuador's containerized cargo market**, having moved more than 955,000 TEUs in 2024, making a significant contribution to key segments of the national trade balance. In just six years of operation, the terminal has handled around 3 million TEUs, reflecting the port's active role in the economy

and its commitment to connecting Ecuador and its products with the world.

The Deepwater Port in Posorja continues to establish itself as a driving force for transformation in Ecuador's port sector after six years of operations. Since its arrival in the country, DP World has provided Ecuador with a port that operates with the **highest standards of safety, efficiency, and sustainability, featuring modern infrastructure, cutting-edge technology, and excellence in service.**



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PRODEVELOP

The future won't wait: digitalization reaches oil terminals to reduce delays and million-dollar losses

Oil terminals in Latin America have faced a dangerous combination for decades: manual planning, lack of digitalization, and high operational costs. In an environment where every hour counts and where freight contracts impose severe penalties for delays, the need for change is urgent.

One of the most critical problems is the **lack of real-time visibility** into terminal operations. Decisions such as which vessel to serve first, when to start or finish a loading operation, or how to prioritize the use of a berth or buoy are often made without considering all key variables, such as pipeline conditions, tank availability, and freight contracts. This not only leads to **operational** management issues but also to **contractual penalties**, high levels of operational stress, and strained relationships with clients and suppliers.

Thanks to the advancement of specialized technologies for this type of critical infrastructure, it is now possible to implement digital solutions like **Posidonia Operations**, which automatically generate optimized

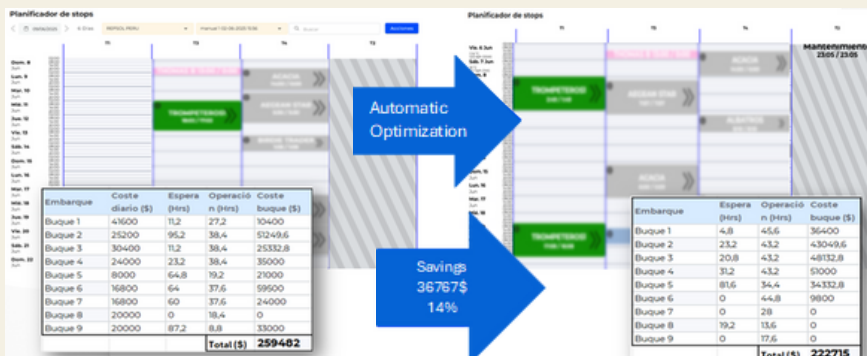
operational plans by considering multiple business and operational constraints. The following figure shows an example in which, thanks to an intelligent automatic optimization algorithm, the system produces a plan that allows a reduction in demurrage costs. This system has been successfully implemented at the La Pampilla Terminal (Repsol, Peru).

The result is **comprehensive and automated planning** that not only minimizes demurrage costs in freight contracts but also brings additional high-impact benefits:

The question is no longer whether to digitalize, but how much it costs to continue without doing so. ⚓



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Reduction in emissions, thanks to a decrease in waiting times for docked or anchored ships.

Customer and supplier satisfaction, thanks to reliable information, predictable times, and smoother operations.

Improved strategic decision-making, thanks to access to historical data and real-time analytics.

ARTICLES

Manzanillo: Mexico's strategic port platform and driver of logistics transformation in Latin America

GENERAL COORDINATION OF PORTS AND MERCHANT MARINE, SECRETARIAT OF THE NAVY, MEXICO

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THE FUTURE WON'T WAIT: DIGITALIZATION REACHES OIL TERMINALS TO REDUCE DELAYS AND MILLION-DOLLAR LOSSES

PRODEVELOP, SPAIN

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