

### Main news

The following tables show rankings of the top 50 OTIs (NVOs) in Brazil and Plate (Argentina, Paraguay, and Uruguay) for container shipping between January-July 2020, compared to the same period in 2019, based on DataLiner data:

#### Brazil

#### DataLiner Brazil OTI (NVO) Rankings | Jan to Jul 2019-2020 | TEU | Exports

Rank	Company	2019	2020	% Change
1	KUEHNE & NAGEL	37.098	40.625	9.51%
2	DB SCHENKER	25.825	19.929	-22.83%
3	AMTRANS LOGISTICA & TRANSPORTES INTERNACIONAIS LTDA	15.566	19.535	25.49%
4	AGILITY LOGISTICS	13.942	18.652	33.78%
5	ASIA SHIPPING	6.084	16.822	176.50%
6	CONFIDENCE ASSESSORIA EM COMERCIO EXTERIOR LTDA	10.244	13.501	31.79%
7	DHL GLOBAL FORWARDING	14.108	13.493	-4.36%
8	VLMLOG LOGISTICA INTERNACIONAL	13.930	13.189	-5.32%
9	CRAFT MULTIMODAL	7.783	8.017	3.01%
10	PANALPINA	11.407	7.975	-30.09%
11	INTERGLOBO INTERNATIONAL FREIGHT FORWARDING	5.946	7.492	26.00%
12	DC LOGISTICS	5.586	7.213	29.12%
13	INDAIA LOGISTICA INTERNACIONAL	5.566	7.139	28.27%
14	SAFELOG TRANSPORTES & LOGISTICA LTDA EPP	5.479	6.810	24.30%
15	SAVINO DEL BENE	6.920	6.415	-7.30%
16	ANDES OPERADOR MULTIMODAL LTDA	8.395	6.250	-25.55%
17	EASY SHIPPING GLOBAL LOGISTICA LTDA	5.328	5.681	6.63%
18	B&M LOGISTICA INTERNACIONAL	3.679	5.645	53.44%
19	EURO AMERICA INTERNATIONAL FREIGHT FORWARDERS	5.969	5.529	-7.36%
20	J C ASSESSORIA EM COMERCIO EXTERIOR LTDA	7.927	5.513	-30.45%
21	EASYLOG SERVICOS & LOGISTICA LTDA EPP	6.755	5.069	-24.96%
22	EAST LINE LTD	4.586	4.730	3.14%
23	AGL CARGO	3.105	4.457	43.54%
24	EXPEDITORS INTERNATIONAL	5.480	4.248	-22.49%
25	FR MEYERS SOHN LOGISTICS	5.488	4.011	-26.91%
26	JAS FORWARDING WORLDWIDE	3.635	3.914	7.69%
27	INTERMAR APRETIMENTO E AGENCIAMENTO LTDA	1.876	3.858	105.65%
28	BLU LOGISTICS BRASIL TRANSPORTES INTERNACIONAIS LTDA	1.520	3.772	148.20%
29	FESHI SERVICOS ADUANEIROS & TRANSPORTES LTDA	3.997	3.667	-8.26%
30	DSV TRANSPORT & LOGISTICS CO	3.896	3.576	-8.21%
31	JOSE RUBEM TRANSPORTE & EQUIPAMENTO LTDA	1.648	3.343	102.85%
32	PLENNA ASSESSORIA EM COMERCIO EXTERIOR LTDA EPP	4.765	3.246	-31.88%
33	BCF COMISSONARIA ADUANEIRA & SERV DE IMP & EXP LTDA	2.518	3.030	20.33%
34	CEVA LOGISTICS	2.144	2.847	32.76%
35	MASTER SUL COMEX LTDA	3.772	2.663	-29.39%
36	C FREIGHT AGENCIAMENTOS INTERNACIONAIS LTDA	1.504	2.660	76.91%
37	SMX INTERNATIONAL LTDA EPP	235	2.639	1022.98%
38	EASY WAY AGENCIAMENTO DE CARGAS INTERNACIONAIS LTDA EPP	954	2.632	175.75%
39	MANUPOINT LOGISTICS	2.433	2.558	5.14%
40	ASLL AIRSEA LAND ASSESSORIA & LOGISTICA LTDA	2.404	2.541	5.70%
41	FEDEX TRADE NETWORKS	6.156	2.512	-59.19%
42	SERVIMEX LOGISTICS LTDA	2.469	2.346	-4.98%
43	ALLOG TRANSPORTES INTERNACIONAIS	1.119	2.326	107.88%
44	ACCESS GLOBAL LOGISTICS	1.593	2.272	42.65%
45	GRUPO SATEL	850	2.227	162.15%
46	COMMANDER LOGISTICA LTDA	4.608	2.169	-52.93%
47	DACHSER TRANSPORT & LOGISTICS	2.769	2.117	-23.55%
48	ORGANIZACAO LEON REICH LTDA	1.436	2.114	47.21%
49	BLUE LINE AGENCIAMENTO MARITIMO LTDA	1.571	2.111	34.37%
50	MG LOGISTICA	838	2.032	142.48%
	TOTAL	302.906	327.113	7.99%
	OTHERS	201.174	189.865	-5.62%
	GRAND TOTAL	504.079	516.978	2.56%

#### DataLiner Brazil OTI (NVO) Rankings | Jan to Jun 2019-2020 | TEU | Imports

Rank	Company	2019	2020	% Change
1	ASIA SHIPPING	67.592	58.102	-14.04%
2	KUEHNE & NAGEL	35.904	30.266	-15.70%
3	BLU LOGISTICS BRASIL TRANSPORTES INTERNACIONAIS LTDA	28.738	26.502	-7.78%
4	AGILITY LOGISTICS	24.859	19.054	-23.35%
5	PANTOS LOGISTICS	16.657	17.323	4.00%
6	DB SCHENKER	21.938	16.676	-23.99%
7	COMISSARIA PIBERNAT LTDA	13.222	16.533	25.04%
8	CRAFT MULTIMODAL	19.892	16.443	-17.34%
9	PANALPINA	23.717	16.014	-32.48%
10	DHL GLOBAL FORWARDING	17.477	15.375	-12.03%
11	CEVA LOGISTICS	14.951	15.173	1.48%
12	DC LOGISTICS	13.644	13.896	1.85%
13	ALLOG TRANSPORTES INTERNACIONAIS	13.037	13.150	0.87%
14	DSV TRANSPORT & LOGISTICS CO	8.799	12.348	40.34%
15	HAND LINE TRANSPORTES INTERNACIONAIS LTDA	12.410	9.322	-24.88%
16	BDP	8.111	8.362	3.09%
17	JAS FORWARDING WORLDWIDE	8.566	8.161	-4.72%
18	EXPEDITORS INTERNATIONAL	8.386	7.956	-5.12%
19	ES BRASIL LOGISTICA LTDA	6.930	7.331	5.79%
20	INDAIA LOGISTICA INTERNACIONAL	6.004	7.021	16.93%
21	ROYAL AGENCIAMENTOS DE CARGAS LTDA EPP	7.358	6.874	-6.58%
22	HYUNDAI GLOVIS	10.158	6.174	-39.22%
23	FIORDE LOGISTICA INTERNACIONAL	7.644	6.055	-20.78%
24	MAERSK GROUP	5	5.805	99.91%
25	CTI CARGO	4.379	5.729	30.83%
26	HM WAY LOGISTICS	8.066	5.693	-29.42%
27	ANX LOGISTICA INTERNACIONAL & AGENCIAMENTO LTDA	7.730	5.394	-30.22%
28	SAMSUNG LOGISTICS	5.475	5.225	-4.57%
29	HELLMANN WORLDWIDE LOGISTICS	4.943	4.580	-7.35%
30	RENTAL LOGISTICA & TRANSPORTE LTDA	2.737	4.516	65.00%
31	CHENDA CARGO LOGISTICS BRASIL LTDA	9.127	4.513	-50.55%
32	GEODIS WILSON	4.389	4.498	2.49%
33	ANDES OPERADOR MULTIMODAL LTDA	3.841	4.438	15.54%
34	ASLL AIRSEA LAND ASSESSORIA & LOGISTICA LTDA	8.381	4.085	-51.26%
35	NEXT SHIPPING LOGISTICA INTERNACIONAL LTDA ME	3.890	4.059	4.34%
36	PLUSCARGO GROUP	4.965	4.026	-18.91%
37	LESCHACO GROUP	3.829	3.986	4.12%
38	MANUPOINT LOGISTICS	3.769	3.881	2.99%
39	PGL BRASIL LTDA	4.298	3.765	-12.39%
40	ALLINK TRANSPORTES INTERNACIONAIS LTDA	4.404	3.669	-16.70%
41	CMA CGM LOGISTICS	1.237	3.501	183.05%
42	FIGWAL TRANSPORTES INTERNACIONAIS LTDA	4.025	3.471	-13.75%
43	NEW TRAFIC LOGISTICA INTERNACIONAL & TRANSPORTE LTDA	3.652	3.282	-10.13%
44	DACHSER TRANSPORT & LOGISTICS	3.934	3.258	-17.18%
45	DELFIN CARGO SERVICE GROUP	4.133	3.169	-23.32%
46	KPM LOGISTICS AGENCIAMENTO DE CARGAS EIRELI	3.280	3.151	-3.93%
47	B&M LOGISTICA INTERNACIONAL	3.584	3.085	-13.92%
48	CISA TRADING SA	2.561	3.028	18.26%
49	SEA SKY LOGISTICA DE TRANSPORTE INTERNACIONAL LTDA	4.110	3.010	-26.76%
50	NUNO FERREIRA CARGAS INTERNACIONAIS LTDA	2.699	2.900	7.43%
	TOTAL	513.435	463.831	-9.66%
	OTHERS	296.277	247.736	-16.38%
	GRAND TOTAL	809.711	711.566	-12.12%

#### Plate

#### DataLiner Plate OTI (NVO) Rankings | Jan to Jul 2019-2020 | TEU | Exports

Rank	Company	2019	2020	% Change
1	KUEHNE & NAGEL	6.670	6.992	4.83%
2	ITL CARGO	1.667	3.850	130.95%
3	JF HILLEBRAND GROUP	1.997	3.061	53.25%
4	BDP	2.588	2.881	11.34%
5	ALTERCARGO SRL	1.751	2.275	29.93%
6	MGP LOGISTICS	1.883	2.266	20.34%
7	DB SCHENKER	2.029	1.967	-3.06%
8	AMERICANA SHIPPING GROUP	1.323	1.767	33.56%
9	BLU LOGISTICS	1.343	1.635	21.74%
10	PANALPINA	1.541	1.397	-9.32%
11	TIBA GROUP	1.443	1.386	-3.95%
12	TRANSCARGO	689	1.334	93.61%
13	PLUSCARGO GROUP	1.433	1.314	-8.34%
14	HELLMANN WORLDWIDE LOGISTICS	1.066	1.296	21.56%
15	DHL GLOBAL FORWARDING	1.403	1.221	-12.98%
16	SEABIRD ARGENTINA SA	1.034	1.216	17.66%
17	SUFLENORSA TRANSITARIOS SL	0	1.216	100.00%
18	INTER AMERICAN CARGO GROUP	883	1.192	34.99%
19	MERCATOR TRANSPORT ARGENTINA SA	660	1.148	73.94%
20	AGROLOG SA	1.191	1.143	-4.03%
21	ALMAR INTERNATIONAL	807	1.133	40.40%
22	KEEMO SA	1.102	1.102	0.05%
23	LATCOMEX SA	755	1.091	44.50%
24	VINPAC CONTAINER LINE	1.073	971	-9.51%
25	RALESUR SA	959	959	0.00%
26	OUTLAND LOGISTCS	148	952	543.24%
27	SEASIDE LOGISTICS SA	1.161	951	-18.09%
28	FELPOINT SRL	565	943	66.90%
29	RUCA LOGISTICS SA	950	902	-5.05%
30	LIBRESRIO SRL	861	889	3.30%
31	FRUCOMEX SRL	412	863	109.47%
32	LOGISTICA INTEGRAL SRL	0	830	100.00%
33	CODE LOGISTICS SA	587	817	39.18%
34	JAB COMERCIO EXTERIOR & ADUANA SRL	1.095	807	-26.30%
35	INTERALMAR SA	574	790	37.72%
36	MERCOMAR SA	879	768	-12.63%
37	C & M SHIPBROKER ARGENTINA SRL	286	714	149.83%
38	GIORGIO GORI	481	713	48.23%
39	PORTLAND LOGISTIC SRL	121	712	488.43%
40	MARALCOR SA	210	705	235.31%
41	GEFCO LOGISTICS	352	699	98.86%
42	SOUTHCROSS LOGISTICS	948	699	-26.27%
43	MERCOLINE SRL	1.111	684	-38.43%
44	INTERMODAL TANK TRANSPORT LOGISTICS	167	682	308.38%
45	JAS FORWARDING WORLDWIDE	601	675	12.41%
46	GLOBAL DISTRIBUTION & SERVICES SA	404	657	62.58%
47	OCEAN INTERNATIONAL SERVICES SA	553	631	14.10%
48	TERRAMAR LOGISTICA SRL	395	631	59.75%
49	LOGCARGO	1.203	620	-48.48%
50	ULSA GROUP	333	609	82.88%
	TOTAL	10.300	64.757	528.72%
	OTHER	35.389	34.387	-2.83%
	GRAN TOTAL	45.688	99.144	117.00%

### DataLiner Plate OTI (NVO) Rankings | Jan to Jul 2019 - 2020 | TEU | Imports

Rank	Company	2019	2020	% Change
1	KUEHNE & NAGEL	15.738	12.931	-17.84%
2	CRAFT MULTIMODAL	6.194	8.034	29.71%
3	PLUSCARGO GROUP	9.079	7.838	-13.66%
4	LOCKSLEY SRL	7.991	7.742	-3.12%
5	DHL GLOBAL FORWARDING	5.944	5.421	-8.80%
6	LINER SHIPPING SERVICES SA	4.024	5.014	24.60%
7	YUSEN LOGISTICS	7.026	4.999	-28.85%
8	DB SCHENKER	4.529	4.973	9.79%
9	HB LOGISTICA SRL	4.181	4.083	-2.35%
10	PANALPINA	7.153	4.000	-44.08%
11	INTERLOG SA	4.150	3.880	-6.51%
12	HELLMANN WORLDWIDE LOGISTICS	2.869	3.701	29.00%
13	MSL CORPORATE	4.081	3.364	-17.57%
14	GEODIS WILSON	5.013	3.150	-37.16%
15	TITO GLOBAL TRADE SERVICES	1.956	3.046	55.73%
16	TRANSPORTES UNIVERSALES	1.500	2.933	95.54%
17	ALMAR INTERNATIONAL	3.503	2.735	-21.92%
18	TRANSCARGO	2.627	2.524	-3.94%
19	BDP	2.480	2.517	1.49%
20	NAVICON URUGUAY SA	0	2.386	100.00%
21	BLU LOGISTICS	1.459	2.157	47.84%
22	ALFA TRADING	1.928	1.956	1.45%
23	SAVINO DEL BENE	1.686	1.907	13.11%
24	NAVICON SA	2.512	1.872	-25.48%
25	GEFCO LOGISTICS	2.691	1.836	-31.77%
26	EXPEDITORS INTERNATIONAL	1.857	1.766	-4.91%
27	CONTROL INFORMATICO DE CARGAS SA	1.215	1.646	35.47%
28	SACO SHIPPING	1.803	1.609	-10.75%
29	ORGANIZACION DE SERVICIOS ADUANEROS SA	0	1.589	100.00%
30	JAS FORWARDING DE ARGENTINA SA	1.521	1.563	2.76%
31	DSV TRANSPORT & LOGISTICS CO	2.150	1.339	-37.70%
32	EAF SA	984	1.323	34.45%
33	JAUSER CARGO	2.118	1.284	-39.38%
34	DAMCO LOGISTICS	1.238	1.235	-0.24%
35	SEASIDE LOGISTICS SA	1.040	1.220	17.31%
36	NAVICON INTERNATIONAL TRANSPORT	4.426	1.207	-72.73%
37	REPREMAR LOGISTICS	1.382	1.191	-13.82%
38	OVERSEAS	1.437	1.178	-18.05%
39	NIP CARGO SRL	758	1.162	53.30%
40	ROHLIG ARGENTINA SRL	964	1.010	4.77%
41	OUTLAND LOGISTCS	946	993	4.97%
42	UNIVERSAL SHIPPING AGENCY SA	1.490	942	-36.78%
43	ECU WORLDWIDE LOGISTICS	986	922	-6.49%
44	DACHSER TRANSPORT & LOGISTICS	1.276	899	-29.55%
45	SOUTHCROSS LOGISTICS	1.056	872	-17.47%
46	ANDES LOGISTICS	352	869	146.87%
47	ALL IN SHIPPING	769	854	11.05%
48	BOLLORE LOGISTICS	830	851	2.53%
49	NEW TIME LOGISTICS SA	629	848	34.82%
50	RALESUR SA	1.031	846	-17.94%
	TOTAL	27.383	134.217	390.14%
	OTHERS	80.295	62.477	-22.19%
	GRAND TOTAL	107.678	196.694	82.67%

**Ports, terminals and infrastructure**

**Mauro Mendes, governor of Mato Grosso, has announced that the Cáceres Fluvial Port has been renovated and is ready to transport cargo on the Paraguay-Paraná Waterway.** The structure had been deactivated for just over 10 years pending completion of the improvements implemented through an agreement between Companhia Mato-Grossense de Mineração (METAMAT) and the Associação Pró-Hidrovia do Rio Paraguay (APH).

“Last year, we built the solution together with the association of producers in the region. It is completely renovated, and ready to operate. The environmental license has already been granted. It is a highly anticipated work which adds to the Export Processing Zone (ZPE), another important initiative that has been waiting for decades; now, we have resumed activities”, says the governor.

The forecast is that the port may be in operation this year, announced César Miranda, Secretary of Economic Development (SEDEC). “Both the ZPE and port will definitely develop this entire region, attracting new industries, generating jobs, and adding value to our products. It will be a new phase for the western region of Mato Grosso.”

Formed by producers in the region, APH invested approximately R\$ 1.5 million in the refurbishment work. The start of operations will facilitate a more attractive cost-benefit option, not only for the producer in exporting, but also for importing fertilizers from neighboring countries via the waterway.

The Cáceres Fluvial Port has been delegated by the federal government for administration by METAMAT since 1998.

**The expansion of the Maranhão grain terminal, Tegram, which began on August 31, is expanding the grain-handling capacity of the Port of Itaqui.** This is because investments made by the Tegram Consortium made it possible to handle simultaneous grain shipments at berths 100 and 103, increasing Itaqui’s capacity to 20 million tons of grain per year, including VLI operations at berth 105.

The Consortium invested R\$260 million during this second phase of the project. In addition to the funds provided during the first phase (R\$ 600 million), the total amount invested is R\$860 million. The work generated approximately 500 jobs and once it is finished, the terminal should require more than 100 new workers.

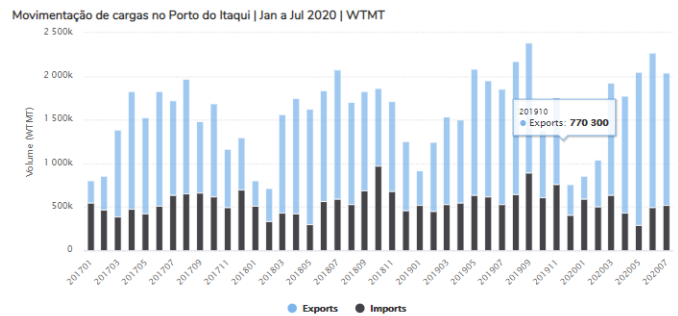
“This investment included the duplication of the railway hopper, from the hopper’s receiving conveyor belts to warehouses and from warehouses to berth 100, as well as a 3000 ton-per-hour ship loader, which more than doubles our current capacity”, stated Marcos Pepe Bertoni, director of the Tegram consortium.

**A record July** - This new phase also marks the best July in the history of Itaqui Port. The total cargo handled in July by the port reached 2.4 million tons and was above the previous record set in 2018, when 2.3 million tons of cargo passed through Itaqui. In July 2020, records were also set in the handling of solid bulk and specific loads of soybean meal, corn, wheat, and LPG.

The expectation is to close this year with a volume of more than 8.3 million tons of grain at Tegram alone. From January to July, the terminal handled 70 ships, 300 trains, 61,000 trailers, and more than 4.8 million tons of grain.

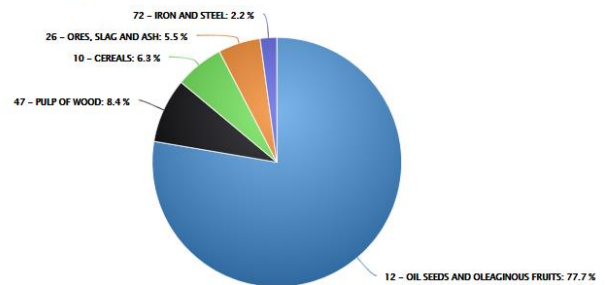
The graph below shows Itaqui port’s cargo handling history:

**Cargo movement at Itaqui Port | Jan-July 2020 | WTMT**



Fonte: DataLiner

**Principais mercadorias Exportadas em Itaqui | Jan a Jul 2020 | WTMT**



Fonte: DataLiner

**The Development** - Tegram is one of the largest infrastructure projects for Brazilian grain exports and has directly benefited producers in the MATOPIBA region (Maranhão, Tocantins, Piauí, and Bahia) and in the northeastern area of Mato Grosso.

The consortium that manages Tegram is formed by the companies Terminal Corredor Norte (linked to the trading company NovaAgri, held by the Japanese group Toyota Tsusho), Glencore Serviços (held by the Glencore trading company), Corredor Logística e Infraestrutura (logistics arm of the CGG Group, which also deals in grain trading and production), and ALZ Terminais Portuários (from the Amaggi, Louis Dreyfus, and Zen-Noh Grain trading companies)

**On August 3, the public company Portos do Paraná published a notice for the auction of the vehicle handling area at Paranaguá Port. PAR12 is on the east side of the pier, has an area measuring 74,000 m2 and a patio with a capacity for 4,000 vehicles.**

Aimed at handling Ro-Ro cargo, the lease is for a greenfield site. The winner will be the highest bidder and the estimated investment cost (Capex) is R\$22.2 million.

The notice and the annexes are available on the websites: [www.portosdoparana.pr.gov.br](http://www.portosdoparana.pr.gov.br), [www.infraestrutura.gov.br](http://www.infraestrutura.gov.br), and [www.antaq.gov.br](http://www.antaq.gov.br). The documents are also found at the administrative headquarters of the Port of Paranaguá, at Avenida Ayrton Senna da Silva, 161, Dom Pedro II.

The public auction session will be held on the São Paulo Stock Exchange (B3), on December 18th. The Paraná port authority is the first in Brazil to auction a terminal at its port. Portos do Paraná was given autonomy to manage the development contracts in August 2019.

“Authorization to do this was formalized after an extensive process of analysis, in which the State demonstrated the capacity and competence to carry out these processes”, explains the president of the public company, Luiz Fernando Garcia. “It was an important step, which guarantees management autonomy and allows the port facilities to be operated in a decentralized manner”, he says.

The lease is for a 25-year term and may be extended at the discretion of the granting authority and within the terms of the notice. The forecast demand, in this period, is growing and could reach 448,716 vehicles by 2045.

The scenarios and demand projection are part of the Technical, Economic, and Environmental Feasibility Study (EVTEA), carried out by the Planning and Logistics Company S.A, linked to the Infrastructure Ministry.

**On September 3, the Infrastructure Ministry (MInfra) published notices for public bid's of four port terminals: Paranaguá (PR), Maceió (AL) and two in Aratu, Bahia. The auctions are scheduled for December 18 at the Brazilian stock Exchange, B3, in São Paulo.**

The concession for the ATU12 terminal located in Aratu will be used for the handling of bulk minerals and will have a 25-year contract. ATU 18, also in Aratu, will be dedicated to the transport of bulk vegetables and will have a 15-year contract. The port complex, where the greenfield land is located, functions as an outlet for production and imports from the Camaçari Industrial Pole – the largest integrated industrial complex in the southern hemisphere which houses more than 90 chemical and petrochemical industries, in addition to companies from other sectors such as automotive, pulp, copper metallurgy etc.

The estimate is that R\$244.95 million will be invested in the ATU 12 terminal for improvements and equipment acquisitions. For the ATU 18 terminal, investments are expected to reach R\$ 119.94 million, including the construction of new storage silos, dredging to deepen the mooring berth, and acquisition of systems and equipment.

According to Diogo Piloni, Secretary of Ports and Water Transport of the Ministry of Infrastructure, the goal is to leverage the economy: “With these four new terminal auctions, we continue seeking opportunities for new investments in the port sector, thereby contributing to the recovery of the economy by creating jobs and generating income.”

In Maceió, the concession of the MAC 10 terminal will be for 25 years, with an investment forecast of R\$12 million. The terminal will be dedicated to the handling of liquid bulk, especially sulfuric acid. The demand for chemical products in the complex is highly influenced by the presence of the Alagoas Chloro-Chemical Complex, located in the municipality of Marechal Deodoro.

At the Paranaguá Port Complex, the terminal will also be leased for 25 years in a greenfield area, and will be dedicated to the handling and storage of ro-ro cargo (access ramp for vehicle cargo). Currently, Brazil plays an important role in the ro-ro cargo sector, with several international headquarters in the automobile industry recently investing in production plants in the country. For the Paraná-São Francisco do Sul cluster, a weighted-average growth rate of 2% is forecast for the 25-year period, with an

estimated movement of 276,000 tons in 2021 and reaching 453,000 tons in 2045.

**Between September 21 and October 8, a scan will be carried out at the Port of Santos in order to identify abandoned dangerous cargoes. The action was defined in a meeting with members of the Brazilian Institute for the Environment and Natural Resources (Ibama), the Army, the Port Authority, and bodies linked to the Environment, held on August 31.**

Operation Relic is carried out every year by Ibama in order to locate and inspect imported cargoes that have been abandoned or retained, and which may cause risks to the environment and people's health. However, the explosion at the Port of Beirut drew the attention of the environmental agency, which decided to devote efforts to the inspection of ammonium nitrate and dangerous products. The Reliquary Operation will include a complete survey of 55 port terminals and three companies in Cubatão.

“We held the meeting with the objective of inviting these state and municipal authorities to join our operation, which is an operation for everyone. It [operation] was further strengthened. We had already closed with federal agencies and, now, with municipal and state agencies. The operation is not punitive, it is preventive and oriented”, explains federal environmental agent Ana Angélica Alabarce, responsible for Ibama in the region.

According to her, in addition to mapping dangerous products, the operation will also inspect cargo stored and abandoned in the port area and in the industrial hub. “Even if the terminal does not deal with dangerous products, we are going to carry out a load of stored cargo, cleared, but not removed”, he explains.

Four teams must conduct the daily survey in two finishes in the morning and two in the afternoon. The groups must have members of the Army, Ibama, SPA, Federal Revenue, Antaq, ANPT, Cetesb, Civil Defense, Anvisa, and Navy when necessary.

“It does not mean that the Port of Santos is at risk, because the control is well done, both by the SPA (port authority) and the Army and by the IRS. This scan will be to inspect products that pass through Santos, and how the terminals are handling, storing, and transporting them”, explains Ana.

Ibama inspectors from other Brazilian states must monitor the activities in Santos. “We are in a time of restrictions and it is not so comfortable for people to come to the operation. Everyone is looking to come and participate. It will serve as a pilot for operations in other ports. They [inspectors] are going to be propagators, joining the Army, Navy and regional authorities to develop this in other locations”, concludes Ana Angélica.

**The Port of Santana, Amapá's main port, will have an area auctioned in January 2021. According to the National Waterway Transport Agency (Antaq), the forecast is for an auction to be held for an area measuring 3,186 m2 for handling, storage, and distribution of solid vegetable bulk, especially soybean meal.** The contract is expected to be valued at R\$261.6 million with an investment of R\$41.3 million, with the concession lasting 25 years. According to Antaq, the site can handle around 4.3 million tonnes.

The process went through previous phases, such as the public hearing in February this year, where agents directly and indirectly



affected by the activity were heard in the city council, and suggestions were received. Now, the process is being analyzed by the Federal Audit Court (TCU). The public notice of the impending auction should happen in October.

“It is expected that the operations to be carried out at the terminal will be for waterway cargo handling, hence the terminal should enable the movement and storage of soy bran destined mainly for the international market”, said Antaq. The person responsible for the lease will receive the area with some existing structures and will be expected to invest in facilities and equipment to obtain the total export capacity, including storage silos, conveyors, elevators, and towers.

The port of Santana was built in the 1950s, by the Minerals Trade Industry (Icomi), for the shipment of manganese. Currently, in addition to transporting ores, grains and chips, the port is also a place for loading and unloading containers.

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**In August, cargo handling at the Port of Cabedelo (PB) increased by 22.1% year-on-year. The cumulative total for the year to date was also higher. Growth registered 10.45% year-on-year for this period, with 700,000 tonnes handled.** “We are managing to not only maintain, but increase our growth rate despite the adverse scenario. This is an extremely positive result for our Port and for Paraíba”, celebrates the president of Companhia Docas da Paraíba (Docas-PB), Gilmará Temóteo.

A report released by Companhia Docas da Paraíba (Docas-PB) points out that in 2020 there were already 60 moorings at the Port of Cabedelo. The most recent operations were with Strategic Unity bulk carriers, which came from Argentina and unloaded 14,002 tonnes of wheat at berth 105, and Apogee Endeavor, which came from Uruguay to unload 9,021 tonnes of malt at berth 107.

Solid bulk is the main growth driver. In 2019, about 367,000 tonnes were handled, while this year the Port of Cabedelo already handled almost 450,000 tonnes – an increase of more than 22%. The highlights are petroleum coke (38% increase) and malt (14.6% increase).

For liquid bulk, 31 operations have already been performed. There were 17 gasoline unloading operations, totaling 187,107 tonnes handled; and 14 diesel operations, which add up to almost 65,000 tonnes. In total, 251,151 tonnes of fuel have already been operated by Docas-PB.

In total, 700,345 tonnes passed through the Port of Cabedelo in 2020, with operations for wheat, malt, petroleum coke, ilmenite, gasoline, and diesel. In the same period of 2019, the amount had been 634,084 tonnes.

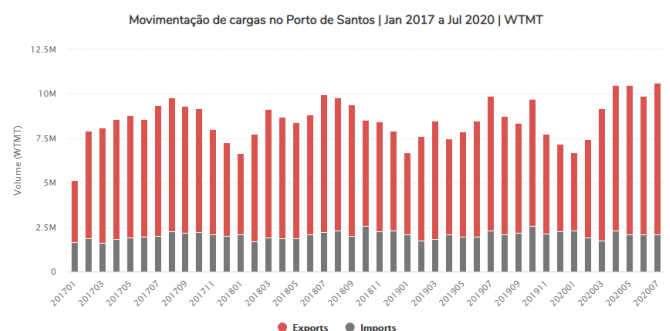
For containerized cargo, the result until August 2020 already almost exceeds the total handled by Customs Transit in the whole of 2019. Last year, 18,900 tonnes were handled, whilst in the first eight months of 2020 alone, 18,114 tonnes have already passed through the port of Cabedelo.

**As of this Tuesday, September 1st, the Santos Port Authority (SPA) is implementing a change in the way vessels enter the port in an effort to reduce the bureaucracy involved in moorings.**

SPA Resolution 151/2020 now considers only those vessels that have their operation confirmed by Pilotage. Until then, all vessels scheduled would have to be canceled if there was no effective way of it docking, subject to a penalty for use of the infrastructure. As the port works with six-hour planned slots, before the user with a scheduled vessel needed to enter the system up to four times a day to undo the order, which required dedicated personnel to implement. According to a SPA survey, a company employee spends two months just on this task as there are around 50,000 requests/year for docking cancellations.

The graph below shows cargo movement at the Port of Santos between January 2017 - July 2020:

### Cargo handling at the Port of Santos | Jan 2017 to Jul 2020 | WTMT



Fonte: DataLiner (Para solicitar um demo do DataLiner clique aqui)

With the change, only ships that have the maneuver confirmed by Pilotage will be charged the tariff. “The new resolution eliminates the so-called ‘infrastructure cut’, a previous requirement made of companies that requested mooring at the Port of Santos, but, for whatever reason, ended up not using it”, explains SPA’s Director of Operations, Marcelo Ribeiro. “It is a purely bureaucratic service that generated a lot of complaints from the port community and

that, with a simple change, SPA can eliminate, generating time savings for both operators and the Port Authority”, he adds.

In order to maintain fluidity in vessel traffic, it is common for maritime agencies to request the entry of several ships to the same berth, in order to guarantee their place as soon as the berth is available. Depending on the best commercial or operational option, any of these ships are able to use the pier. But this procedure ended up causing many vessels that were not yet ready to enter the port to be included in the tariff collection tables, forcing the port operator to cancel the ship's entry at that time. Now, the “infrastructure cut” will only be necessary after confirmation of the maneuver by Pilotage, in case there is actually any problem that prevents the ship from docking.

### Shipping

**CMA CGM has reported that in order to maintain its quality of service and protect exports from the east coast of South America, it will need to adopt a freight adjustment for a specific service.**

Therefore, beginning on October 5, 2020 (data: BL), the company will apply a general rate increase (GRI) of US\$ 250 per container on dry cargo trade from the east coast of South America (BRAZEX service) to the north and west coasts of South America, Mexico, USA, Canada, Central America, and the Caribbean.

According to the company, the GRI is expected to remain in force until November 5, 2020.

**A.P.Moller – Maersk informed it will integrate the Safmarine brand and continue the process of centralizing his customers under the Maersk brand. Thus, as of January 1, 2021, Safmarine will complete its transition to the Maersk brand.**

More news is that Damco's Air Freight and LCL logistics chain products will be integrated into Maersk's portfolio of logistics services. Thus, the offer of the multi-carrier maritime product (NVOCC) will be discontinued.

As a result of the integration, by the end of 2020, the Safmarine and Damco brands will no longer be offered. Hamburg Süd and Aliança will remain independent brands, with their differentiated business models. In addition, Sealand – The Maersk Company will continue as an independent brand under A.P. Moller – Maersk, maintaining its position as an intra-regional provider.

In a statement, Maersk said that “it will simplify its organizational structure across the Ocean & Logistics area globally to further improve customer focus and efficiency. As part of this, Maersk and Hamburg Süd's customer support offices will work more closely to be a more customer-centric team, while continuing to serve customers as two distinct brands with a differentiated service”. The changes will gradually take effect from October 1st.

**CMA CGM has announced that it will extend the period that the surcharge (Peak Season Surcharge) on reefer cargo from the East Coast of South America to India, the Gulf of the Middle East, and the Red Sea.** The measure came into effect on April 1, 2020 (shipment date), and will now be valid until December 31, 2020. The surcharge amount is US\$500 for 20' reefer containers and US\$1000 for 40' reefer containers for ECSA services: SIRIUS, SAMWAF, SAFRAN, and NEFGUI.

### Meat

**According to the Labor Prosecution Office (MPT), the Aurora Alimentos Central Cooperative will carry out medical screening and RT-PCR testing to detect COVID-19 in all employees and contractors of its slaughterhouses in Rio Grande do Sul to control the spread of the virus.** This results from an agreement with the agency, which observed an increase in cases in some company units. More than 3,600 employees and outsourced workers at the Sarandi and Erechim factories will be tested.

Under the agreement, testing will be done in two stages, each of which will cover all workers at the units, amounting to 7,266 tests.

Those testing positive will be put on leave for 14 days and inconclusive cases will be sent for further testing. Only employees who test negative and are asymptomatic for a minimum of 72 hours will be allowed to return to work. The procedure will be monitored by the local health and epidemiological surveillance authorities. Workers will only return after obtaining the test results, the purpose being to block the transmission.

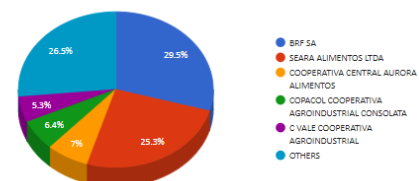
In August, the company signed an agreement with the MPT to test all workers from four units in Santa Catarina that were being monitored by the regional MPT.

For the coordinators of the MPT National Refrigeration Work Environment Adequacy Project, “testing workers is a fundamental strategy for controlling cases of COVID-19, containing and blocking transmission and reducing the impact on local public health. Companies that establish testing strategies in conjunction with an effective active search demonstrate a real concern for maintaining healthy work environments for workers”.

In August, the local government of the southern Chinese city, Shenzhen, reported that a sample of frozen chicken wings imported from a Brazilian Aurora Alimentos slaughterhouse located in Santa Catarina had tested positive for Covid-19. Hong Kong subsequently suspended chicken imports from this Aurora unit and the slaughterhouse voluntarily suspended the unit's exports to China.

Aurora is third in the ranking of Brazilian chicken-exporting companies, as can be seen in the chart below:

Exportações brasileiras de carne de frango por empresa | Jan a Julho de 2020 | TEU



Fonte: DataLiner (Para solicitar um demo do DataLiner clique aqui)

### Grain

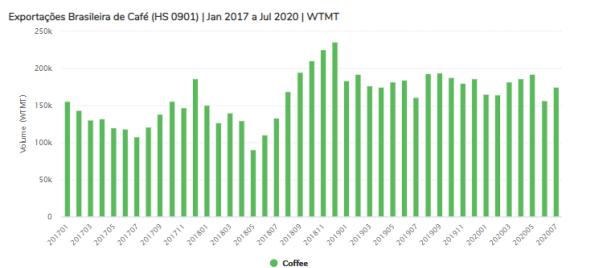
**In August, 44,000 tons of rice were shipped at Tecon Imituba. The volume was stored in 1,720 containers which**

### were loaded onboard coastal-shipping vessels that call weekly at the terminal.

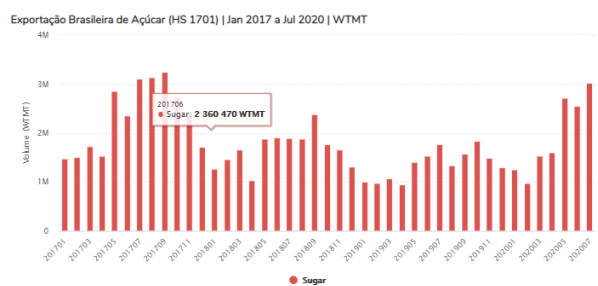
Roughly 40% of all rice produced in the state of Santa Catarina passes through Tecon Imbituba. The terminal is strategically located inland of one of the main grain-producing areas in the country, and thus becomes a competitive alternative for the product flow. Brazil is the largest producer and consumer of rice outside of Asia; production of the grain is mostly concentrated in the South, amounting to 11 million tons per year.

**Data released by the Secretariat of Foreign Trade (Secex) shows that Brazilian green coffee exports reached 191,400 tons in August, an increase of 1.3% in relation to the same month of 2019. Corn shipments fell 11.4 % to 6.48 million tons.** Sugar exports, in turn, more than doubled in August to 3.47 million tons compared to 1.59 million tons in August 2019. Soy reached 6.2 million tons. In August 2019, grain exports had been 5 million tons. With record soy exports, mainly to China, it is estimated that the domestic industry will be forced to import 1 million tons of oilseed by the end of 2020. Another highlight was foreign cotton sales, which rose from 45,300 tons in August 2019 to 109,000 tons in August 2020.

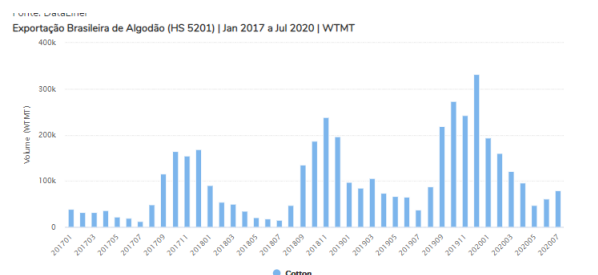
The following graphs show Brazilian exports of coffee, sugar, and cotton from January 2017-July 2020:



Fonte: DataLiner



Fonte: DataLiner



Fonte: DataLiner

Brazilian imports of animal protein are also on the rise, driven by the weaker Real and Chinese demand. Pork meat exports grew by almost 80% in August, with 87,700 tons, up from 49,000 tons in

August 2019. Beef exports totaled 163,200 tons in August, compared with 135,100 tons in August 2019. Poultry exports jumped from 334,500 tons in August 2019 to 340,700 tonnes in August 2020.

### Sugar and ethanol

**According to the Economy Ministry, Brazil has not renewed the 750 million liter quota for ethanol imports at zero tariffs. As a result, since last Monday, August 31, purchases from outside Mercosur have a 20% tax applicable to them.**

According to a note from the ministry, the ordinance that established the quota expired on August 30. But, according to a government source, a decision was made on the 31st not to renew this.

The non-renewal of the annual quota is a request from the powerful agricultural lobby in Brazil. Despite this, there is nothing to prevent the government from adopting any new measure to reduce tariff barriers to ethanol and stop harming the United States, the major exporter of the product to Brazil, according to a government source. According to the source, with the end of the quota, Brazil should now seek a commercial negotiation with the Trump administration, to avoid possible American retaliation.

### Other cargo

**Data released this Friday, September 4th, by the National Association of Motor Vehicle Manufacturers (ANFAVEA) shows that automobile industry exports fell 23.4% in August in comparison with the same month last year.** Over the eight month-period, a total of 176,700 vehicles were shipped, a 41.3% decrease compared to the same period in 2019. The drop in vehicle exports is due to the coronavirus pandemic.

Automaker export revenue from January to August totaled US\$ 3.1 billion, a 34% drop compared to year-ago levels.

Vehicle factories resumed activity at a slower pace after the lockdown to meet less demand in the domestic market and in exports. With 210,900 units, production last month was 21.8% lower than in the same period of 2019.

According to Luiz Carlos Moraes, president of ANFAVEA, the 2020 result up until now shows a loss of four months of production as compared to 2019.

In the cumulative result for the year, 1.11 million vehicles left the assembly lines which represented a decrease of 44.8% in relation to the same period last year.

**Sales** - Vehicle sales in the country dropped 24.5% in August compared to the same month last year, with 183,400 cars, light commercial vehicles, trucks, and buses licensed.

According to Moraes, the sector enters the third quarter better prepared and has begun to adapt to the new demand. The sector ended the month with enough inventory for 23 days of sales, the same as in July.

In the first eight months of the year, sales volume decreased 35%, to 1.16 million vehicles, as compared to the same period last year.

**According to the National Association of Cotton Exporters (ANEA), September should be a good month for sales abroad.**

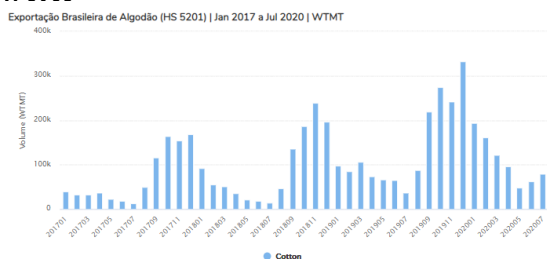
**“September is going to be bigger than August, for sure,” said Henrique Snitcovski, head of the organization.**

According to him, this month’s shipments should exceed last year’s exports which reached 164,600 tons, and was the best September in its history. “Our expectation is that we can achieve a little more than last year,” said the executive.

According to him, the shipments of 109,000 tons registered in August were significant, but they still didn’t reach volume levels exported in 2012 and 2011, which were close to 120,000 tons in the same month.

The graph below for Brazilian cotton exports from January 2017 to July 2020:

**Brazilian Cotton Exports (HS 5201) | Jan 2017 to Jul 2020 | WTMT**



Shipments in the coming months should also benefit from the postponement of exports during the worst moments of the pandemic when prices plummeted.

Thus, exports will count on new sales and the carrying out of previously planned dispatches. ANEA had estimated postponements of 150,000 tons.

According to Snitcovski, the devalued Brazilian currency guarantees the competitiveness of the national product. “Producers have already received a good price for the crop that is being harvested. They have already sold a good part of the next crop, and now they are starting to look for alternatives to sell the 2022 crop, looking for opportunities to protect costs,” he informed.

### Economy

**The commercial exchange between Argentina and Brazil during the month of August, resulted in a deficit of US\$ 107 million for Argentina, greater than the negative balance of US\$ 42 million registered during the same month of last year, according to data released on Sept. 1st by the Foreign Trade Office (Secex), of the Ministry of Economy.**

In the eighth month of the year, the trade flow between Argentina and Brazil was US\$ 1.345 million, representing a 20.5% decrease as compared to the same month in 2019. The official Brazilian report highlighted that Argentina ranked fourth among Brazil’s largest suppliers, behind China (including Hong Kong and Macau), the European Union, and the United States.

During the period from January-August, the trade flow between the two economies fell 27.9%, reaching US\$ 10.058 million. Argentina’s trade balance showed a deficit of US\$ 363 million against a surplus of US\$ 130 million for the same period in 2019.

In August, the Brazilian trade balance registered a record surplus, with US\$6.609 billion more exported than imported. This is the best result for the month since the beginning of the historical series in 1989.

Both exports and imports fell last month, with the daily export average falling 5.5% year-on-year to US\$17.741 billion, and imports falling 25.1% to US\$ 11.133 billion. With the August result, the trade balance accumulates a surplus of US\$36.594 billion in the first eight months of the year. This is the third-best result in the historical series for the period.

The cumulative export total for the first eight months of 2020 totaled US\$138.633 billion, a decrease of 6.6% in comparison with year-ago levels. Imports totaled US\$102.039 billion, a decrease of 25.1% by the same criterion.

Most of the increase in the balance in August is explained by the fall in imports from the mining industry, which fell 59.51% in relation to the same month last year, and from the manufacturing industry, whose purchases from abroad shrank 23.78%. On the export side, manufacturing industry sales fell 14.2%, and for the mining industry fell 8.6%. In contrast, agricultural exports rose by 32.64%.

**Product Categories** - Among the products that drove the growth of agricultural exports in August, the highlights were soybeans, whose value sold increased by US\$443.3 million in relation to the same month last year, and raw cotton, with an increase of US\$80.9 million in the same comparison.

In the mining industry, exports of iron ore fell by US\$ 442 million compared to August last year, and crude petroleum oils suffered a decrease of US\$451.6 million. In both cases, the drop is due to the negative variation in international prices compared to 2019, because the volumes shipped were stable in the case of iron and increased 21% in the case of oil.

In the manufacturing industry, the largest declines were recorded in exports of non-electric engines and machines (-US\$187 million), cellulose (-US\$157.8 million), and petroleum fuel oils (-US\$152.6 million). In addition to the COVID-19 pandemic, which impacted the economy worldwide, the crisis in Argentina, the main destination for Brazilian industrial exports, contributed to the result.

**Annual target** - After the trade balance ended 2019 at US\$48.035 billion, the second-largest positive result in history, the market estimates a smaller surplus in 2020, mainly due to the pandemic. According to the Focus bulletin, a weekly survey of financial institutions released by the Central Bank, market analysts predict a US\$55 billion surplus for this year. In July, the Ministry of Economy updated the positive balance estimate to US\$ 55.4 billion.

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