Rosario fell to second place in the world agricultural port hubs ranking in 2020

Federico Di Yenno - Emilce Terré - Julio Calzada

With exports for 70 Mt, agricultural ports hub of Rosario handed over the 1st place in the agribusiness export nodes ranking to New Orleans in 2020. The low level of the Paraná River and the Chinese demand are two of the factors that explain these changes.

Rosario hub positioned itself as the second most important agribusiness export port node of the world in 2020, with a gross total of 70 million tons (Mt) of grain, meal and oils shipped in 2020. The enclave in the South of Santa Fe became the second most important port area of agribusiness products bulk export in the world, after yielding the first place obtained in 2019 to the United States customs district of New Orleans, in Louisiana, which shipped 78.35 Mt. The third place per exported volume remained in the hands of the Brazilian port of Santos, with 43 Mt. After the trade war, the greater demand of grain by China caused the United States to substantially increase the exported volume, while the low water level of the Paraná river, the virtual shutdown of activities due to union conflicts in December and the retraction of the oil industry took a toll on the local node.

Argentina, in terms of volume, is third in the ranking of agricultural commodity exporters on a global level, with an exported total of 89.3 Mt in the closed crop season 19/20 (the first place is held by the United States, that exported 186.32 Mt in 19/20, while Brazil exported 129.3 Mt, remaining in the second place). Only with the shippings made from Rosario hub during 2019, Argentina reached the third place, exceeding the rest of the world in exported volume. Due to this, the following analysis will only focus on the ports of the United States, Brazil and Argentina, without detailing ports of lower total export of grains and its by-products than Rosario city cluster, such as Ukraine, Russia or Canada.

Although the United States and Brazil export a higher volume of grains, oilseeds and by-products than our country, there are several characteristics that favour the bulk export from Rosario city cluster of ports, which makes it the main agricultural commodities export node in the world. When we speak of Rosario hub, we refer to the oilseed industrial and port complex that, along 70 km of coast on the Paraná river, go from the city of Timbúes (in the North) to Arroyo Seco (located to the South of Rosario). There are located the port terminals that operate different types of cargoes, from which grain, oils and by-products are shipped, among others.

During 2020, the Rosario export hub got the second place in exported volume of products within the soybean complex (bean, meal and oils) and the corn complex (corn grain). Also for the wheat complex (wheat grain and meal), it holds the second place, always widely above the ports located in the customs region of Columbia-Snake, in the state of Oregon, United States. As for export of products of the barley complex, including forage grain, malting barley and malt, the ports in the Southern region of Buenos Aires are leaders on a global level.

Este material se encuentra inscripto en el Registro de la Propiedad Intelectual bajo el N xxxxx, puede ser reproducido de manera total o parcial citando como fuente.

The advantage gained by the customs district of New Orleans over Rosario hub during 2020 is due to an increase in shipped volume from the American cluster regarding the previous year, as well as a retraction of shipments from the South of Santa Fe. The improvement of the export performance of the United States is explained, mainly, by the renewed impetus of sales to China, once the Asian giant left behind the most critical phase of the COVID pandemics in the first trimester of the year. Thanks to it, the terminals in the South of the United States exported almost 14 million tons more than the previous year, a 22% increase.

On the opposite side, the shipments from Rosario city cluster of ports fell from 79 Mt in 2019 to 70 Mt in 2020, losing 9 Mt or 11% in that year. However, the decrease in volume of grain shipped is only 6%, or 2.3 million tons, while the fall in volume shipped of meal reaches 19% or 6.3 million tons. Among the most harmful factors that explain this movement are the historical low water level of the Paraná River and the union conflicts in the month of December, which virtually shutdown the reception and shipment of goods. On top of that, we can add the retraction of shipments of the oil industry, strongly concentrated on the enclave in the South of Santa Fe. In particular, the shipped volume of products of the soybean complex lost 18% year-on-year, while the sunflower complex receded by 46%.

Este material se encuentra inscripto en el Registro de la Propiedad Intelectual bajo el N xxxxx, puede ser reproducido de manera total o parcial citando como fuente.