South America Container Terminal Operations Market Size & Share Analysis - Growth Trends and Forecast (2026 - 2031)

> **Industry:** Maritime, Port & Container Operations (Logistics & Supply Chain)

> **Source:** https://www.mordorintelligence.com/industry-reports/south-america-container-terminal-operations-market
> **Scraped Date:** 2026-09-17

Executive Market Summary

Market Metric	Details
Base Market Size	USD 4.56 billion
Projected Forecast (2031)	USD 4.56 billion
Growth Rate (CAGR)	4.42 %
Largest Market Region	N/A
Fastest-Growing Region	N/A

Market Visualizations & Infographics

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![Major players in South America Container Terminal Operations industry](images/chart_2.png)

![South America Container Terminal Operations Market Size](images/chart_3.png)

![South America Container Terminal Operations Market Share by Service, 2025](images/chart_4.png)

![South America Container Terminal Operations Market Share by Automation Level, 2025](images/chart_5.png)

![South America Container Terminal Operations Market Concentration](images/chart_6.png)

![Icon](images/chart_7.png)

![footer background image](images/chart_9.png)

![Mordor Intelligence on Facebook](images/chart_11.svg)

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![ESOMAR](images/chart_16.png)

![GPTW](images/chart_18.png)
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Comprehensive Research Analysis

Overview Points List Flex 49 Share Feature End

Market Overview

Study Period
|

2020 - 2031
|

Forecast Data Period
|

2026 - 2031
|

Base Year Market Size (2025)
|

USD 4.37 Billion
|

Market Size (2026)
|

USD 4.56 Billion
|

Market Size (2031)
|

USD 5.66 Billion
|

Growth Rate (2026 - 2031)
|

4.42 %
|

Market Concentration
|

Medium
|

Major Players

*Disclaimer: Major Players sorted in no particular order

|

Market Overview

South America Container Terminal Operations Market Analysis by Mordor Intelligence

The South America container terminal operations market size was valued at USD 4.37 billion in 2025 and is estimated to grow from USD 4.56 billion in 2026 to reach USD 5.66 billion by 2031, at a CAGR of 4.42% during the forecast period (2026-2031).

Agribusiness export chains, stronger links with Asia-Pacific routes, and concession-backed capacity projects support demand across the South America container terminal operations market, while direct Pacific connections are changing the cargo-routing choices available to importers and exporters and placing greater focus on gateway reliability. Terminal operators are extending their role beyond quay handling by adding warehousing, rail links, inland transport, cold-chain facilities, customs support, and other services that allow customers to manage more of their logistics through one provider. Brazil, Chile, Peru, and Colombia are refining concession frameworks to attract private capital with longer investment horizons, because berth expansions require coordinated investment in access channels, equipment, yards, workforce capability, and cargo connections. Competition for transshipment traffic is influencing investment priorities on both Atlantic and Pacific coastlines, particularly as Chancay and Callao develop roles in shorter Asia-Pacific service patterns.

Key Report Takeaways

* By service, stevedoring held 43.50% of the South America container terminal operations market share in 2025, while transportation is expected to be the fastest-growing service segment at a 4.81% CAGR through 2031.

* By ownership model, state-owned terminals held 47.06% of the South America container terminal operations market size in 2025, while public-private partnerships are projected to grow at a 5.15% CAGR through 2031.

* By automation level, manual operations held 72.82% of the South America container terminal operations market share in 2025, while fully automated terminals are projected to grow at a 6.33% CAGR through 2031.

* By container type, general containers held 57.43% of the South America container terminal operations market size in 2025, while reefer containers are projected to grow at a 5.07% CAGR through 2031.

* By country, Brazil held 55.20% of the revenue in 2025, while Peru is forecast to grow at a 5.31% CAGR through 2031.

Key Market Trends

South America Container Terminal Operations Market Trends and Insights

Drivers Impact Analysis*

Driver |

(~) % Impact on CAGR Forecast |

Geographic Relevance |

Impact Timeline |

Expansion of deep-water gateway capacity

|

+1.2%
|

Brazil, Chile, Peru
|

Medium term (2-4 years)
|

Asia-South America service upgrades and larger vessel calls

|

+0.9%
|

Peru, Chile, Brazil, Pacific and Atlantic corridors
|

Short term (≤ 2 years)
|

Public-private concession investment in terminal modernization

|

+0.8%
|

Brazil, Chile, Colombia, Peru
|

Medium term (2-4 years)
|

Cold-chain containerization of agribusiness exports

|

+0.7%
|

Brazil, Chile, Peru, Argentina
|

Short term (≤ 2 years)
|

Electrification improving equipment uptime and operating economics

|

+0.5%
|

Brazil, Chile, Peru
|

Long term (≥ 4 years)
|

Pacific-corridor cargo redistribution through Chancay and Callao

|

+0.6%
|

Peru, Chile, feeder network
|

Short term (≤ 2 years)
|

Source: Mordor Intelligence
|

Competitive Landscape

Competitive Landscape

The South America container terminal operations market is moderately consolidated among the largest assets. Global terminal groups and carrier-linked operators control important high-volume terminals, while domestic concessionaires and specialized operators remain active in mid-tier and regional ports. Carrier-led integration has become a defining feature of current ownership changes, affecting how major operators secure cargo, allocate capacity, and plan future investment. CMA CGM acquired a 51% controlling interest in Santos Brasil during April 2025. MSC completed its acquisition of a 68.4% stake in Wilson Sons during June 2025, adding terminal and tugboat assets to its regional position. These ownership changes increase the importance of relationships between carriers and terminal operators, while independent operators remain exposed to margin pressure when competing for the same high-volume cargo pools.

Technology investment is a second area of competition in the South America container terminal operations market. Remote crane control, automated rubber-tired gantries, electrified equipment, and shore power can influence shipping-line preferences by improving productivity and supporting lower-emission operations. Konecranes received an order for 14 electric rubber-tired gantry cranes from Portonave in Brazil, showing continued investment in lower-emission yard equipment. Mid-tier terminals may have sufficient cargo volumes for semi-automation but lack the concession tenure or cash-flow certainty needed to finance it on viable terms. This creates an opportunity for operators that can combine stable contracts, equipment finance, staff training, and customer commitments. Electrification can reduce operating costs and help terminals meet shipping-line requirements for lower-emission port calls, but it also requires power systems and practical operating capabilities.

Investment partnerships are also changing the competitive structure of the South America container terminal operations market. Stonepeak and CMA CGM completed the formation of UNITED PORTS LLC in July 2026, including assets in Santos. The transaction shows that infrastructure investors are participating alongside carriers in the region’s terminal sector and can provide further capital for capacity and technology upgrades. Large operators can combine capital resources with shipping relationships, global procurement, and longer planning horizons. Regional operators still compete through local customer knowledge, concession positions, specialized cargo capabilities, and service at secondary ports. The South America container terminal operations market therefore favors scale at major gateways while leaving space for focused operators in regional and cargo-specific terminals, especially where large integrated groups have not prioritized local trade flows.

South America Container Terminal Operations Industry Leaders

- DP World Limited
- APM Terminals B.V.
- Mediterranean Shipping Company S.A.
- CMA CGM Group

*

International Container Terminal Services, Inc. (ICTSI)

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*Disclaimer: Major Players sorted in no particular order

Component Component 3 Scope Of The Report Bottom

South America Container Terminal Operations Market Report Scope

By Service

Stevedoring
|

Cargo Handling
|

Transportation
|

Other Services
|

Segmentation Accordion Item

By Country

Argentina
|

Brazil
|

Chile
|

Colombia
|

Peru
|

Rest of South America
|

Frequently Asked Questions

What is the projected growth rate for container terminal operations in South America?

The sector is projected to grow at a 4.42% CAGR from 2026 to 2031, reaching USD 5.66 billion by 2031.

Which country leads container terminal operations in South America?

Brazil led regional revenue with 55.20% in 2025, supported by Santos and a broad national port network.

Which service is growing fastest at South American container terminals?

Transportation is the fastest-growing service segment because operators are adding inland logistics, drayage, depots, and rail services.

Why are reefer containers important for terminal operators?

Reefer containers support growing agricultural exports and generate revenue from handling, storage, and electricity connections.

What is driving automation at container terminals?

Operators are adopting remote controls, electrified yard equipment, and semi-automated systems to improve productivity and equipment availability.

How concentrated is the South America container terminal operations market?

Global and carrier-linked groups control several leading gateways, while domestic operators remain active across regional and specialized terminals.