Ministry of Foreign Affairs

BUSINESS OPPORTUNITIES, KEY PROJECTS AND PLAYERS AT MEXICO´S PORTS

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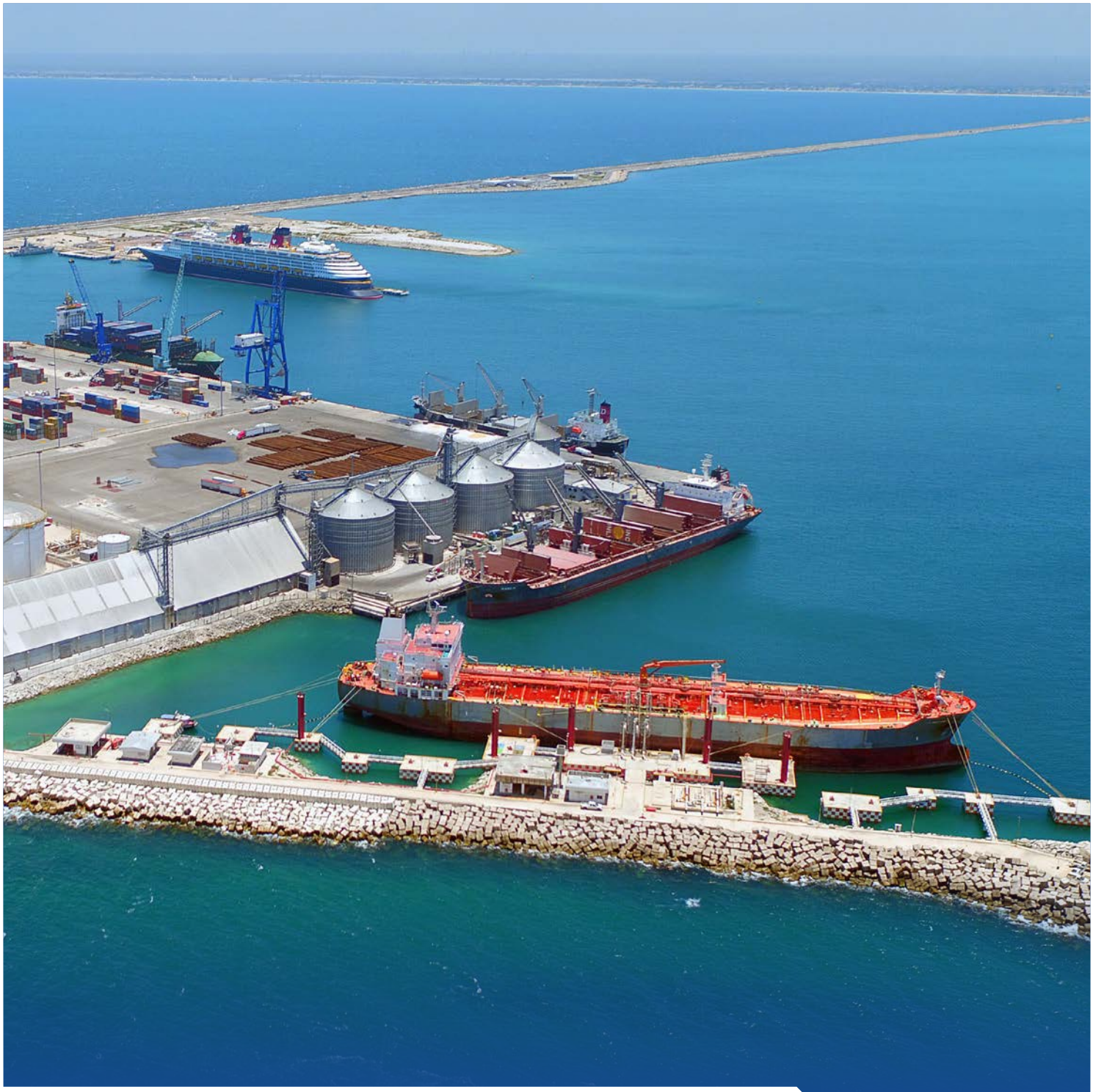


BUSINESS OPPORTUNITIES, KEY PROJECTS AND PLAYERS AT MEXICO´S PORTS

MEXICO BUSINESS

Table of Contents

Executive Summary

Mexico's Ports: Business Opportunities, Key Projects and Players

Boasting close to 6,000 miles of coastline, with 102 ports and 15 terminals, Mexico is the world's 11th-leading exporter. The country's ports and terminals are connected to more than 145 countries, bolstered by Mexico's free trade agreements with over 40 countries, including China, the EU, the US, Japan and Israel.

With many leading ports undergoing expansions and redevelopment under a new military administration, opportunities are emerging for Dutch companies with relevant expertise to broaden their business in the sector. An expected need for pertinent services, from dredging to operations, will open the door to further Dutch participation.

Operating Environment

The legislative changes promoted by President Andrés Manuel L pez Obrador in 2021 were aimed at preventing mismanagement, corruption, and smuggling at customs. It was decided to transfer the management of ports from the Ministry of Communications and Transport (SCT) to the Secretariat of the Navy (SEMAR). In June 2021, inter-secretarial cooperation mechanisms were established for the operation of the National Port System (SPN) to facilitate the transfer of power. The resources of the General Coordination of Ports and Merchant Marine (CGPMM) of the former SCT were subsequently passed to SEMAR, which now grants port concessions as the regulatory authority, approves master plans every five years and obtains 6 percent of ASIPONAS revenues.

ASIPONAS–Mexico's Port Managers

Formerly known as APIs, ASIPONAS are Mexico's port managers and can be owned by the federal or state government. They are constituted as priority public companies that are responsible for managing the awarded operating rights, implementing master plans, programming, development, use, and exploitation of the port in concession. They are self-sufficient, productive, and competitive.

According to the 2022 Federal Expenditure Budget Project, ASIPONAS will have a budget of MX$2.4 billion (approximately US$118.4 million), 10 percent below the budget approved for last year. ASISPONAS currently have 48 open projects for the development and conservation of infrastructure with public resources. Business lines mainly include fluids, petroleum, containers, automotive, agricultural and mineral bulk, general cargo and cruise.

Principal Ports

The following ports have been key to Mexico's trade and economy in recent years, having posted the greatest participation in the movement of cargo. They have also received the highest investment toward their connectivity, capacity, and development.

Port of Manzanillo:

Located in Manzanillo, Colima, Port of Manzanillo is considered the most important and active multipurpose port in Mexico due to its specialized terminal for containers, general cargo, agricultural and bulk minerals, vehicles, perishables, and cruise ships. As the leading Latin American container port in the Pacific Ocean, the port has specialized terminals to receive sixth-generation container ships up to 360 meters in length, with a capacity of 13,400 TEUs. Terminals and facilities are entrusted to national and foreign private companies for an average of 20 years.

OPPORTUNITIES:
The main port services that will be required are services to vessels to carry out their operations internally, as well as port maneuvering services and general services. The port's master plan runs from 2021 to 2026, with a projected MX$11.3 billion (US$540 million) budget. The service goals included in the budget include optimization of port structure and equipment,

expanding the port's concession for the development of new port facilities and terminals, promoting socially and environmentally sustainable development, maintenance, conditioning of navigation channels, urban planning development and financial and legal feasibility studies aimed at developing private participation processes through public-private partnerships.

Port of Lazaro Cardenas:

Mexico's only port with 18m depth is located in the Pacific Ocean basin in Lazaro Cardenas, Michoacan. It is considered the second-busiest Mexican port, having moved 1,630,675 TEU's in 2020. The port is equipped to manage more than 1.2 million containers per year. Port Lazaro Cardenas is an eco-friendly port connected to more than 100 ports across the world.

OPPORTUNITIES:

The Port of Lazaro Cardenas aims to enhance its global participation in ports and intermodal transport to consolidate itself as Mexico's logistics center. Between 2020 and 2025, the port has a projected budget of MX$12 billion (US$521 million). The objectives that complement this master plan are projects to repair and construct boats within the port, encourage development of terminals to handle hydrocarbons through the port, short-distance traffic and cabotage and the development of remote port services as well as additional business nodes at the port (auto-transport services, industrial nodes, corridors or fiscal patios, among others).

Port of Veracruz:

Port of Veracruz is one of the first conditioned ports for the transport of cars, and it is considered one of the most important ports for the Mexican automotive industry, having been the first equipped for the transport of vehicles. The port has direct access to the Gulf of Mexico and it also connects with the main ports of Europe, the US, Latin America, and Asia through the Panama Canal. In 2020, it mobilized 1,005,936 TEUs.

OPPORTUNITIES:

A project is under development to expand and modernize the "New Port of Veracruz" that will increase its merchandise management capacity by up to three times. Construction of the first stage of the expansion includes west breakwater, dredging of the navigation areas, landfills for the terminals and docks for the container and bulk handling. The dredging program seeks to maintain depth levels in areas of navigation. The port's expansion projects include 35 new docking positions and the possibility of access to deep-draft ships. A total investment of MX$1.56 billion (US$74 million) is expected in 2022.

Port of Altamira:

The port of Altamira is ranked first in loose cargo and third for in-vehicle mobility. The port is located on the shores of the Gulf of Mexico in Altamira Tamaulipas and connects with 125 ports across the world.

OPPORTUNITIES:

According to the 2021-2025 master plan, the projected budget for multiple development projects is US$325 million. This investment will convert the Port of Altamira into one of the four principal ports within the national port system that are expected to make Mexico a global logistics platform. The two main challenges are increasing the depth of its navigation areas to 15.5 meters and having docking positions of at least 400 meters long for general cargo containers, strengthening its intermodal connections to cities in northeast Mexico and to the western Bajio region. Other activities listed in the master plan include expanding navigation areas to make the arrival of larger vessels viable and to accommodate activities in the hydrocarbon and petrochemical industry that require large spaces. It is estimated that the port infrastructure will become insufficient in the medium to long term, necessitating expansion and modifications, including a new terminal to handle 2.6 million tons per year.

Port of Ensenada:

The port of Ensenada is located on the west coast of the state of Baja California, connecting border cities like Tijuana, Tecate, and Mexicali, making the US its main merchandise destination. The port also connects to 64 ports, 28 countries and has both cargo and passenger terminals.

OPPORTUNITIES:

Goals and indicators that pertain to the port's master plan for 2018–2023 consider three key points: maintenance of infrastructure and equipment, construction and modernization, and port operation and logistics.

Port of Progreso:

Located in the Yucatan Peninsula, the Port of Progreso has a vast infrastructure of port services. With an official draft of 9.7 meters and 10 berth positions ranging between 130 and 330 meters in length, it has sufficient capacity to move all types of cargo. The following types of terminals operate at the port: a specialized container terminal, a specialized agricultural bulk terminal, which is ranked second for movement at the national level; a specialized terminal for cruise ships and ferries; as well as a hydrocarbon terminal operated by PEMEX.

OPPORTUNITIES:

Among the planned objectives at the Port of Progreso are the dredging and construction of the navigation channel, ciaboga dock, and operational docks, as well as the filling and leveling of a 20-hectare area for new terminals. Other activities include the extension of piers 6 and 7 and the construction of two new docks measuring 600 and 300 meters, respectively. The port's depth will increase from 11.75 to 14.40 meters. The Port of Progreso has multiple-use docks, a dry warehouse and a refrigerated warehouse, among others.

Dos Bocas Refinery and Port

Another important location within the Mexican ports system is the Dos Bocas Refinery and Port, which is focused on petroleum, containers, automotive, agri bulk and general cargo. A US$323 million investment is aimed at strengthening and promoting coordinated actions with the authorities that deliver operational, administrative, or law-mandated activities in the port area.

NEW OPPORTUNITIES FOR DUTCH COMPANIES

Dutch companies are significant providers to national projects like the Dos Bocas refinery, signaling the strong ties between Dutch companies and entities like SEMAR and local ports. With the recent SEMAR restructuring of the ports system, such as SEMAR taking the initiative in dredging activities, there are emerging opportunities for Dutch entities. For example, SEMAR will not be able to provide and cover the total national demand in regard to technology and machinery required, opening a great deal of room for collaboration.

"As SEMAR continues to expand its presence over port leadership, we have seen it is interested in the acquisition of new equipment and technology for the ports' dredging needs," says Jurgen Nieuwenhoven, Area Manager of Dutch dredging expert Van Oord, a company that has already found significant business and projects in the development of the Dos Bocas port and refinery. "In this and other senses, there continues to be several opportunities for us to participate and to help these new port administrations. These military administrations need us to do certain work that is out of their reach, either because it is too specialized or because they cannot do it under the dictated time frames."

The opportunities, however, go beyond dredging. "There are opportunities for international companies, especially Dutch enterprises with maritime and logistics expertise, in specialized areas, such as engineering, consultancy in logistics and energy management and human capital training, in addition to overall bilateral collaboration," says Guido van der Zwet, President of iPS Powerful People, which coordinates employment for multinational personnel worldwide in the international maritime and dredging industry.

Introduction to Port Systems in Mexico

Today, seaports are among the main pillars facilitating international trade. As the main entry points to continents and countries, more than 80 percent of the world's goods are transported through maritime transport. This report highlights the main advantages Mexican ports offer Dutch companies, their current connectivity levels and trends that could boost their effectiveness. The report also lists the principal seaports with the largest participation in Mexico and the main opportunities for Dutch companies.

Mexico, due to its privileged geographical location, has the world's 11th-largest export capacity. The country has 102 ports and 15 terminals. The maritime and logistics industry is a fundamental engine for growth and economic stability, not only for Mexico but also for other exporting countries.

Given its strategic location, Mexico offers immense potential for growth in international trade. As a result, a considerable amount of infrastructure, effort, and budget is allocated annually to boost the industry.

Mexico's seaports work to develop and sustain as efficiently and safely as possible their daily activities, whether commercial, fishing, oil, tourism or others.

The country's ports and terminals are connected to more than 145 countries, including China, the US and Latin America, in addition to having 104 port-coastal intermodal systems (SIPCOS), and five port captaincies. [1]

Trends to boost port services

Partly due to the COVID-19 pandemic, Mexico has experienced an increase in the demand for products, particular because of the rapid rise in e-commerce. According to CEPAL, by 2022, it is estimated that the value of Latin American exports and imports will grow by 10 percent and 9 percent, respectively, due to slower growth in the regional and world economies. The value of Mexican exports, which mainly consist of manufactured goods, is expected to grow 17 percent, mainly driven by the expansion of their volume. A similar situation can be seen in the case of Central America. For the region, and for Mexico, the value of imports is expected to grow more than 25 percent. Value growth in the region during 2021 was due to the rise in prices for raw materials, especially minerals, hydrocarbons, and agro-industrial products, rather than from the expansion of exported volume. Likewise, regional service exports have not recovered from the reduction suffered as a result of the pandemic.

In terms of transportation, Mexico's roads and communications networks are well distributed and connected. Over the years, the country has invested large amounts of resources to develop better communications infrastructure and freight transport routes. For example, in 2020, the Ministry of Communications and Transport (SCT) in collaboration with the Deputy Ministry of Infrastructure, invested MX$34,000 million (US$1.6 billion) to renovate and create high-quality roads. Mexico´s three main modes of freight transport each have special characteristics related to different sectors, distances, and products. Maritime transport is the most used card in the deck of cargo transportation options, with attractive benefits that include high load capacity and merchandise security. During the first five months of 2021, maritime transport represented 26.4 percent of total import and export traffic, according to the Institute of Geography and Statistics (INEGI). Currently, more than 80 percent of the world's goods are transported by sea. Without a doubt, this is the preferred transportation route for most importers and exporters, yet the use of maritime transport in Mexican territory is just 7 percent compared to the other transportation tracks.

In Mexico, approximately 75 percent of cargo is transported by land, and the country has sea outlets

[1] Secretaría de Infraestructura, Comunicaciones y Transporte, México 2022.

to the Pacific, Atlantic, and Gulf of Mexico. According to the Ministry of Communications and Transportation, there are 145,052km of federal and state highways plus other roads that connect the busiest points for cargo deliveries. During 3Q21, the railway sector transported approximately 7.8 million passengers, while the aerospace sector transported 21.9 million. During the same period, the movement of cargo transported by the railway sector totaled 32.3 million tons, and 194,000 tons by the aviation sector. In regard to passenger transportation, for the January-July 2021 period, 15.73 million passengers used the city´s transportation and 118,419 passengers used other transportation modes, totaling 15.85 million passengers.[2]

Changes in market trends directly influence the maritime industry, which needs to keep pace to continue developing. Some of the required developments are:

+ Accelerate and optimize containerized cargo transport processes: Speed and quality are now among the most highly valued demands of customers and buyers. Those companies that get it right will see a boost in market participation while those that do not will likely disappear.
+ Develop specialized terminals to receive and offload cargo: Terminals are a critical node in the transportation process. When the cargo is delivered, the technology and technique employed to manage each type of cargo without damaging or compromising it is vital in the overall trade process.
+ Plan and design new logistics systems: The changing economic environment demands fast, accurate and innovative systems. The delivery of products and services is adopting hybrid modes, where safety needs are being reconsidered and complemented with a new risk panorama; therefore, every industry is faced with modifications to the supply chain. Logistics systems must be reconsidered in a manner that incorporates these factors. One way of achieving this is to bolster the unification and automation of supply chains through technological innovations. For Dutch companies, there is an undeniable opportunity in terms of providing technical assistance, multimodal and blockchain knowledge and technology.
+ Focus on tasks that improve port connectivity with sea and land transport: The challenges of intermodal transport in Mexico are varied and go hand in hand with the current era of digitization, which requires a different treatment by all actors involved in the sector. After 2Q20, the decrease in cargo flows became a major challenge due to the radical increase in demand. Containerization became a global logistics problem. Between 2014 and 2020, intermodal cargo doubled in Mexico to 42,000 containers. On the subject of technology, one of the strongest trends is the use of autonomous vehicles.
+ Incorporate technologies that reduce energy consumption in the port infrastructure: Following the global trend, Mexico is committed to integrating energy efficiency throughout its economic sectors. This is an important opportunity for energy management consultants to assess ports and entities on their processes. The country has great potential to employ clean energy due to its geographic conditions, specifically taking advantage of solar and wind sources to produce electricity, although the energy reform being discussed in Congress has sparked concern among international investors regarding risk and uncertainty. In addition, there are current commitments and international treaties that demand Mexico respect its already-agreed commitments, such as The Paris Agreement that was signed during the 21st Conference of the Parties (COP21) in 2015. Signed by 195 countries, it aims to limit the planet's rising temperature to 1.5 degrees Celsius. Mexico promised that 35 percent of its energy would come from renewable sources by 2024 and 43 percent by 2030. Today, according to Mexico´s Ministry of Energy (SENER) there is infrastructure to generate 31 percent renewable energy.
+ Construction of spaces that allow maximum storage with the least use of surface: Underground storage is ideal for those who want to economize space as well as protection from external threats, such as theft or severe weather. This will preserve more of the prime real estate space. Companies that provide assessment and solutions for smart construction and engineering for storage will have an opportunity in this rising trend. [3]

Recent changes in maritime-port administration in Mexico

On July 12, 2019, the government approved the National Development Plan 2019-2024, which is made up of 12 Guiding Principles, three General Axes and a vision toward 2024. It defines the priorities of integral, equitable, inclusive, and sustainable development the country pursues, and the achievements aspired to by the plan's end. On July 2, 2020, the Decree approving the **Sectoral Program of the Ministry of Communications and Transportation 2020-2024** established the steps of the Ministry of Communications and Transportation will take toward the development of an accessible, safe, efficient, sustainable intermodal communication and transport network with a modern and long-term vision that connects population centers, eliminates the exclusion of people and facilitates the transit of goods and services to promote individual well-being and regional development.

The program includes the following APIS/ASIPONAS: Altamira, S.A.; Dos Bocas, S.A. de C.V; Ensenada, S.A. de C. V; Guaymas, S.A. de C.V; Lázaro Cárdenas, S.A. de C.V; Manzanillo, S.A. de C.V; Mazatlán, S.A. de C.V;

[2] Pulso del Sistema Ferroviario Mexicano, 2021, ARTF Agencia Reguladora del Sistema Ferroviario

[3] XXII Congreso AMTI, México 2021.

Progreso, S.A. de C.V; Puerto Madero, S.A. de C.V; Puerto Vallarta, S.A. de C.V; Tampico, S.A. de C.V; Topolobampo, S.A. de C.V; Tuxpan, S.A. de C.V., and Veracruz, S.A. de C.V. These are parastatal entities, sectorized to the Ministry of Communications and Transportation.

The legislative changes promoted by President Andrés Manuel L pez Obrador in 2021 were aimed at preventing mismanagement, corruption, and smuggling at customs. National security was one of the reasons it was decided to transfer the management of ports from the Secretariat of Communications to the Secretariat of the Navy (SEMAR). In June 2021, inter-secretarial cooperation mechanisms were established to guarantee the correct operation of the National Port System (SPN) in the transfer of administrative responsibilities and respect of its civil nature. The transfer of powers and resources of the General Coordination of Ports and Merchant Marine (CGPMM) of the former Secretariat of Communications and Transport (SCT) were passed to SEMAR.

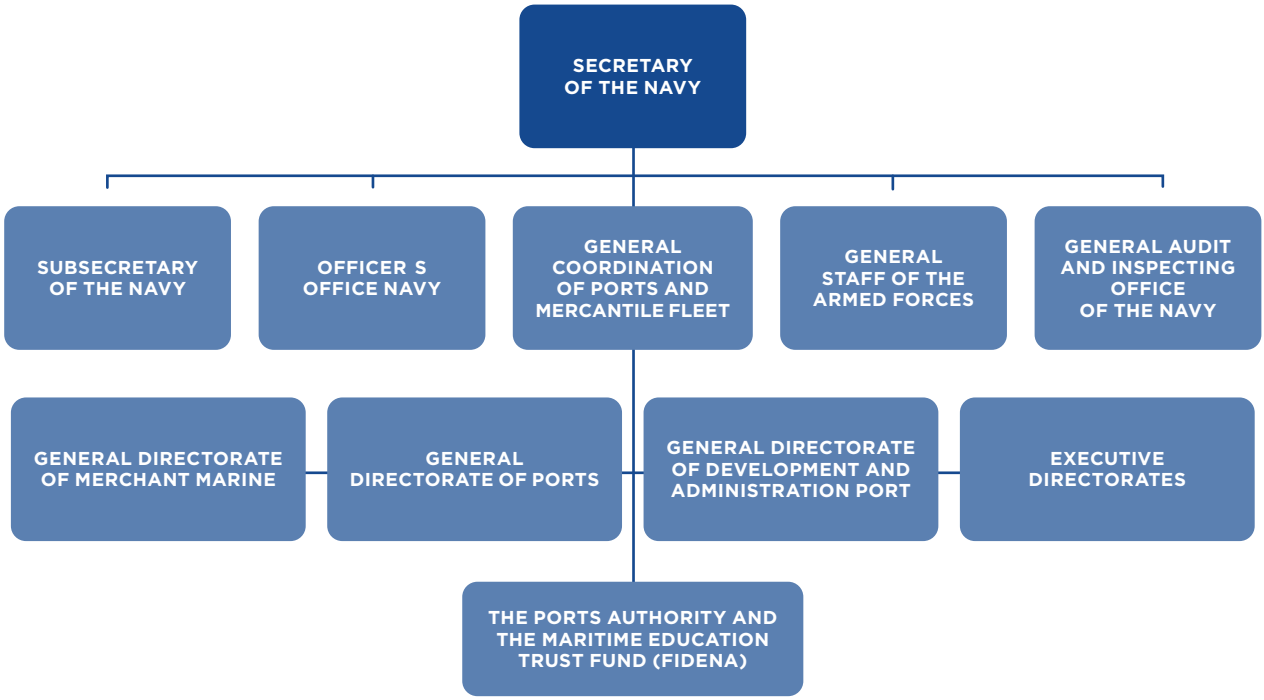
Prior to the official transfer, a draft was circulated among the national maritime community that, based on what was expressed by the head of SEMAR, the CGPMM would be elevated to the rank of Undersecretariat but has not happened the entity remains in the coordination stage within the institution.

The transfer derives from the precept published in the DOF on Dec. 7, 2020, in which it was ordered that the **SCT deliver to SEMAR the human, financial and material resources of the General Coordination of Ports and Merchant Marine, General Directorate of Port Development and Administration, General Directorate of Ports and General Directorate of Merchant Marine**.

In this sense, the 14 Comprehensive Port Administrations (API) of the country, the Training and Training Trust for Merchant Marine Personnel (FIDENA), and the Development Fund of the Mexican Merchant Marine are included in the delivery. All these resources are necessary for the execution of the attributions that by virtue of the "Decree" have been transferred to SEMAR.

Organizational Structure 2022:

SEMAR / **REGULATOR**	+ One of the nineteen state secretariats that, together with the Legal Counsel of the Federal Executive, make up the legal cabinet of the President of Mexico. Along with the Secretariat of National Defense, it is the office of the federal executive power with functions of the Ministry of Defense.	+ Grants port concessions as the regulatory authority. + Approves master plans every 5 years. + Gets 6% of Asiponas revenues.
ASIPONA / **PORT MANAGER**	+ Formerly known as API, currently in migration process or official names to ASIPONA (the federal Gov. owned). + Corporate entity that can be: Federal gov. owned, State	+ Can be government owned: Federal or State: Private or hybrid. + Responsible for managing the port awarded operating rights. + Implements master plans + Income comes from land lease and infrastructure use lease, federal and state owned cannot make profit
OPERATOR	+ Can be private operators or Asiponas acting as operators as well. + Services inside the terminal like transporte, cargo handling, logistics, etc.	+ Operate commercially. + Fees come from the provided services to different companies involved in the terminal, for example shipping services.



Source: **CGPMM 2022**

The current directors of the 14 ASIPONAS (Federal) and 8 APIs (State) are the following:

1. ASIPONA Altamira: Captain Oscar Miguel Ochoa Gorena
2. ASIPONA Manzanillo: Admiral Salvador Gómez Meillón
3. ASIPONA Dos Bocas: Admiral Gregorio Martínez Núñez
4. ASIPONA Ensenada: Captain Manuel Fernando Gutiérrez Gallardo
5. ASIPONA Guaymas: Rear Admiral CGDEM (retired) Catarino Hernández Tapia
6. ASIPONA Lázaro Cardenas: Admiral (retired) Jorge Luis Cruz Ballado
7. ASIPONA Mazatlán: Rear Admiral Mariel Aquileo Ancona Infanzón
8. ASIPONA Progreso: Admiral Jorge Carlos Tovilla Rodriguez
9. ASIPONA Puerto Madero: Admiral Retirado Flavio del Ángel García
10. ASIPONA Puerto Vallarta: Admiral Víctor Francisco Uribe Arévalo
11. ASIPONA Tampico: Vice Admiral Miguel Báez Barrera
12. ASIPONA Topolobambo: Vice Admiral Marco Antonio Ibarra Olaje
13. ASIPONA Tuxpan: Vice Admiral Nicodemus Villagómez Broca
14. ASIPONA Veracruz: Engineer Romel Eduardo Ledezma Abaroa
15. API Coatzacoalcos: Engineer Miguel Ángel Sierra Carrasco
16. API Salina Cruz: Engineer Raúl Huerta Martínez
17. API Baja California Sur: Engineer Narciso Agúndez Gómez
18. API Campeche: Engineer Agapito Ceballos Fuentes
19. API Quintana Roo: Alicia Ricalde Magaña
20. API Tabasco: Engineer Darwin Cortés Ocaña
21. API Tamaulipas/Matamoros: Jesús Juan de la Garza Diaz del Guante
22. API Cabo San Lucas: George Antony Méndez

Mexico's six principal ports

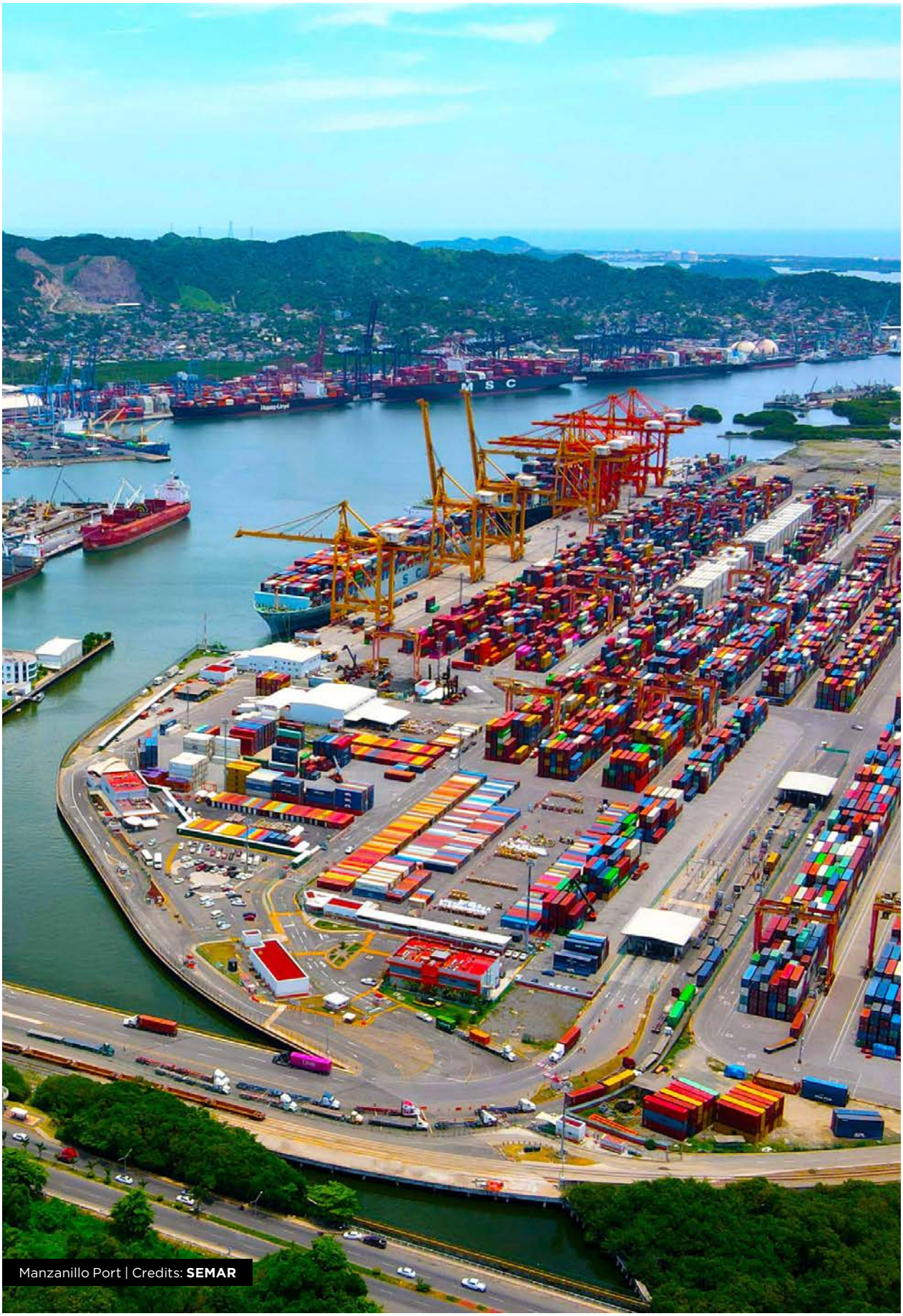
The following ports have been key to the country's trade and economy in recent years, having posted the greatest participation in the movement of cargoes, and the greatest investment toward their connectivity, capacity, and development.

Port of Manzanillo[4]

GENERAL INFORMATION

Located in Manzanillo, Colima, it is considered the most important and active multipurpose port in Mexico due to its specialized terminal for containers, general cargo, agricultural and bulk minerals, vehicles, perishables, and cruise ships. Manzanillo is considered a key logistics point on the Pacific coast operating throughout the year due

[4] https://www.puertomanzanillo.com.mx/espi/0000001/inicio.html



Manzanillo Port | Credits: **SEMAR**

to excellent weather conditions. The Port of Manzanillo receives most imports headed to central Mexico. It is also a gateway for exports headed to the US, Canada, Colombia, and Guatemala, as well as Asian countries, such as China, Japan, India, Singapore, and Malaysia.

Credits: **GoogleMyMaps**

In 2020, the port mobilized a total of 2,909,599 TEU's (Twenty-foot equivalent units). Beer, copper, coal, steel pipes, resin and sugar are among the port's most exported products. The port links the productive intermodal logistics chain between North America and Asia. The Port of Manzanillo is considered the leading Latin American container port in the Pacific Ocean. It has specialized terminals to receive sixth-generation container ships up to 360 meters in length with a capacity of 13,400 TEUs.

The port operates as a paperless port, with a digital platform of over 6,300 users, via agile electronic procedures, as well as flexible and transparent cargo tracking services, intermodal ship-truck-rail connectivity, with non-intrusive technology for cargo inspection. It also uses certified services and procedures based on national and international standards, such as the ISPS Code, CTPAT, OHSAS 18001, ISO 9001, ISO 14001, ISO 28000, quality management, clean industry, safety, and health, labor equality and socially responsible companies. The port also employs CCTV throughout the facility, a port protection system, and anti-seismic structures.

Type of governance: (Federal-SCT)

TENDER INFORMATION

SUSTAINABLE PORT

Terminals and facilities are entrusted to national and foreign private companies for an average of 20 years, extendable and open competition is a prevailing factor. Mexico's First Clean Port, certified by the environmental authority has all of its port terminals under environmental quality certification. Over the past 15 years, the Port of Manzanillo has maintained sustained growth in the specialized movement of containerized cargo.

OPPORTUNITIES

It is expected that the services provided to the facilities will be of private use, guaranteeing their efficiency. Some of the main port services that will be required are services to vessels to carry out their operations internally, as well as port maneuvering services and general services.

The port's master plan runs from 2021 to 2026, with a projected MX$11.3 billion (US$540 million) budget.

The total budget contains service goals required from private companies. These goals include optimization of port structure and equipment, expanding the port's concession for the development of new port facilities and terminals, promote social and environmental sustainable development, maintenance, conditioning of navigation channels, urban planning development and financial and legal feasibility studies aimed at developing private participation processes through public-private partnerships.

Port Lázaro Cárdenas[5]

GENERAL INFORMATION

Mexico's only port with 18m depth is located in the Pacific Ocean basin in Lazaro Cardenas, Michoacan. It is considered the second-busiest Mexican port, moving approximately 1,630,675 TEU's in 2020 and equipped to manage more than 1.2 million containers per year. Port Lazaro Cardenas is an eco-friendly port connected to more than 100 ports across the world. In addition, it has a semi-automated terminal and it is capable of handling containerized cargo, general, dry, and liquid cargo, vehicles and mineral bulk, among others.

Type of governance: (Federal-SCT)

TENDER INFORMATION

GLOBAL CONNECTIVITY

- Asia: China, South Korea, North Korea, India, Indonesia, Hong Kong, Japan, Malaysia Singapore, Thailand, Taiwan.
- Central America: Panama, Guatemala, El Salvador, Costa Rica, Nicaragua, Honduras.
- North America: Canada, USA, Puerto Rico.
- South America: Brazil, Chile, Colombia, Curacao, Ecuador, Peru, Trinidad and Tobago, Uruguay, Netherlands Antilles.
- Europe: Germany, Belgium, France, Holland, Poland, Romania, Russia, Ukraine.
- Africa: Morocco, Reunion Island, South Africa.
- Oceania: Australia.

RAILWAY NETWORK: 85.3KM RAILWAYS

Public Terminals: Container Specialist, Agricultural Bulk, Specialized Automobile Terminal, Bulk Ore, and Steel Products Terminal.

Private Terminals: Charcoal, Metals and Minerals Fertilizers, Petroleum Fluids, Fluid Management.

Trade Facilitation Infrastructure: Area of Logistics Services to Motor Auto Transport, Customs Export,

Credits: **GoogleMyMaps**

[5] https://www.puertolazarocardenas.com.mx/plc25/

Lázaro Cárdenas Port | Credits: **SEMAR**

Customs Import, Maritime Traffic Control Tower, Corporate Building, and Business Center.

OPPORTUNITIES

According to the national port master plan 2019 to 2024, its main purpose is to promote investment and activate the economy. The Port of Lazaro Cardenas aims to enhance its global participation in ports and intermodal transport to consolidate itself as Mexico's logistics center. Between 2020 and 2025, the port has a projected budget of MX$12 billion (US$521 million). The specific objectives that complement this master plan are projects aimed at the repair and construction of boats within the port, encourage development of terminals that handle hydrocarbons through the port, short-distance traffic and cabotage, develop remote port services, as well as additional business nodes to the port (auto-transport services, industrial nodes, corridors or fiscal patios, among others), promote the development of the coast of Michoacan by incorporating sustainable port infrastructure facilities and maintenance dredging, among others.

Port of Veracruz[6]

GENERAL INFORMATION

The port is located in Veracruz, Mexico and is top-ranked for the movement of containerized cargo in the Gulf of Mexico. It is one of the most significant and oldest ports in Latin America. It is also one of the first conditioned ports for the transport of cars, and it is considered one of the most important ports for the Mexican automotive industry, having been the first equipped for the transport of vehicles.

The port has direct access to the Gulf of Mexico and it also connects with the main ports of Europe, the US, Latin America, and Asia through the Panama Canal. In addition, it is connected to more than 72km of railways and 80km of roads, allowing it to reach the entire Mexican territory. During 2020, it mobilized 1,005,936 TEU's. A project is under development to expand and modernize the "New Port of Veracruz" that will increase up to three times its merchandise management capacity.

In 2020, Port of Veracruz registered 11,062,665 tons of cargo, a decrease of 7.2 percent compared to 2019 when 12,887,483 tons were registered. The Port of Veracruz is the oldest port in the country and, historically, the most significant.

The port of Veracruz improved its performance in the first five months of 2021, registering a 7.4 percent growth from January to May, totaling 460,034 TEUs, a difference of 31,796 containers, compared to the 428,303 registered during the same period in 2020.

During the January-May 2021 period, 846 ships arrived at the port, representing a 5.1 percent increase, representing 41 additional ships, compared to the 805 ships that were registered during the same period in 2020.

Credits: **GoogleMyMaps**

[6] http://www.puertodeveracruz.com.mx/mc/

Type of governance: (Federal-SCT)
4 Ports: Tecolutla, Nautla, Alvarado, Tlacotalpan.

TENDER INFORMATION

OPPORTUNITIES

Construction of the first stage of the expansion of the Port of Veracruz includes west breakwater, dredging for the navigation areas, landfills for the terminals and docks for the container and bulk handling. Implementing the dredging program seeks to maintain depth levels and preserve depth in areas of navigation at the Port of Tuxpan. The expansion of the Port of Veracruz has prompted President L pez Obrador's administration to allocate at least US$63 million to continue work in one of the most important ports in the country.

Infrastructure equipment and construction for the new customs area has been contemplated, including import and export review modules and access to the port, with a total of MX$52 million (US$2.5 million) to be invested. For the construction of potable water, irrigation and fire protection networks, as well as the sewage and sanitation systems (WWTP-North and WWTP-South) in the port expansion zone (northwest of the port area of Veracruz), a total of MX$23 million (US$1.1 million) will be allocated.

For the construction of a control and monitoring center for motor transport access and traffic to increase the logistics and operational competitiveness of the port, as well as to increase its security and the construction of the JT Road Distributor in the New Access to the Port Zone for the management of the vehicular flows generated by the port´s expansion projects, an additional MX$17 million (US$838,000) will be invested.

The port's expansion projects include 35 new docking positions and the possibility of access to deep-draft ships. A total investment of MX$1.56 billion (US$74 million) is expected in 2022.

Port of Altamira[7]

GENERAL INFORMATION

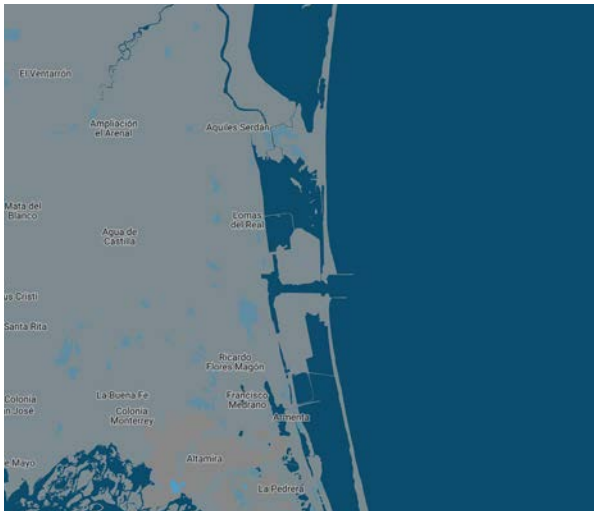
The port of Altamira is ranked first in loose cargo and third for in-vehicle mobility. The port is located on the shores of the Gulf of Mexico in Altamira Tamaulipas, connecting with 125 ports across the world. Its rail and land transport connections cater to Mexico´s northern and central regions. In conjunction with the Port of Tampico, in 2020, the port moved a total of 776,999 TEUs It is considered the main port for the movement of petrochemical fluids.

At the end of October 2021, the port moved more than 18.4 million tons of cargo, registering a 26 percent increase compared to the same period for the previous year. Thanks to the new projects inaugurated through the enclosure and different port terminals, 1,610 ships have been attended, representing a 15 percent increase compared to the previous period.

Loose general cargo represented a 76 percent growth compared to the same period in the previous year, with more than 3.4 million tons transported at the end of October. For instance, manufactured finished cars totaled 248,552 units, a 12 percent increase for this business line.

In addition, mineral bulk cargo posted a significant increase, reporting 18 percent growth and a movement totaling 4.3 million tons. In regard to agricultural bulk, 905,945 tons were transported through the port area, resulting in a 38 percent increase compared to the previous period.

Type of governance: (Federal-SCT)



Credits: **GoogleMyMaps**

[7] https://www.puertoaltamira.com.mx/espi/0000001/inicio

Altamira Port | Credits: **SEMAR**

TENDER INFORMATION

DISTRIBUTION BY TYPE OF CARGO.

Containerized cargo leads the ports cargo distribution, followed by loose general cargo, petrochemical fluids, mineral bulk, and agricultural bulk.

PORT INFRASTRUCTURE

+ Has the potential for 90 berthing positions.
+ Today there are 17 berthing positions in operation.
+ Currently has a draft of 40 feet, to be increased to 50 feet.

NEW INFRASTRUCTURE

The Port of Altamira stands out for its significant growth in infrastructure and cargo movement.

Today, six new fronts of water are being constructed and will give service to:

+ The expansion of two multipurpose terminals.
+ Two new hydrocarbon storage terminals.
+ One new terminal for the construction of an oil platform.

The number of berthing positions will increase by 35 percent, from 17 to 23.

OPPORTUNITIES

According to the 2021-2025 master plan, the projected budget for multiple development projects is US$325 million. This investment will convert the Port of Altamira into one of the four principal ports within the national port system, helping Mexico to become a global logistics platform. The two main challenges are: increasing the depth of its navigation areas to 15.5 meters and having docking positions of at least 400 meters long for general cargo containers, strengthening its intermodal connections to cities in northeast Mexico, as well as in western Bajio, in addition to states in the country with low or no penetration. Other activities listed in the master plan: increase navigation areas to make viable the arrival of larger vessels and activities in the hydrocarbon and petrochemical industry that require large spaces. It is estimated that in the medium to long term, the port infrastructure is expected to become insufficient, so it needs to be expanded and modified, including a new terminal to be able to handle 2.6 million tons per year.

Port of Ensenada[8]

The port of Ensenada is located on the west coast of the state of Baja California, connecting border cities like Tijuana, Tecate, and Mexicali, making the US its main merchandise destination. The port also connects to 64 ports, 28 countries and has both cargo and passenger terminals.

The port of Ensenada was the only port that did not post a decrease in its results due to the pandemic, totaling around 384,871 TEUs in 2020.

Type of governance: (Federal-SCT) Seven Ports: Rosarito, Costa Azul, El Sauzal, Bahia Colonet, Venustiano Carranza, San Felipe, Isla Cedros.

Total investment: US$64.6 million

Modernization and construction of facilities, increasing a birthing position.

Credits: **GoogleMyMaps**

TENDER INFORMATION

OPPORTUNITIES:

Goals and indicators that pertain to the port´s master plan for 2018–2023 consider three key points: maintenance of infrastructure and equipment, construction and modernization and port operation and logistics.

[8] **https://www.puertoensenada.com.mx/espi/0000001/inicio**

Port of Progreso[9]

Located in the Yucatan Peninsula, the Port of Progreso has a vast infrastructure capable of offering excellent port services. With an official draft of 9.7 meters and 10 berth positions ranging between 130 and 330 meters in length, it has sufficient capacity to move all types of cargo. It is the only offshore port in the country with a 7.5km breakwater and a navigation channel 6.5km long, 150 meters wide and 12.8 meters deep.

The following types of terminals operate at the port: a specialized container terminal, a specialized agricultural bulk terminal, which is ranked second for movement at the national level; a specialized terminal for cruise ships and ferries, as well as a hydrocarbon terminal operated by PEMEX. It is considered the main port of the state of Yucatan, Mexico. Progreso is the base of an important fishing industry and since the completion of a 6.5km long viaduct and port facilities in 1989, it has become the main export and import port for the Yucatan area.

The main exports from Port of Progreso are the following: textiles, jewelry, electronic products to the US manufactured by maquiladora factories, which are exempt from US customs taxes, henequen fiber derivatives, poultry and pork products, fruits and vegetables, seafood, and honey. Services available in Port of Progreso are: 1 container terminal, 1 solid grain terminal, 1 tank terminal, 2 public berths for multipurpose shipments, 1 cruise terminal, bunkering, tug boat, ship's supply, stevedoring, water supply, ship's repair, fumigation, and phytosanitary certificate issuance.

Credits: **GoogleMyMaps**

Type of governance: (Federal-SCT)

ENGINEERING TENDERS.

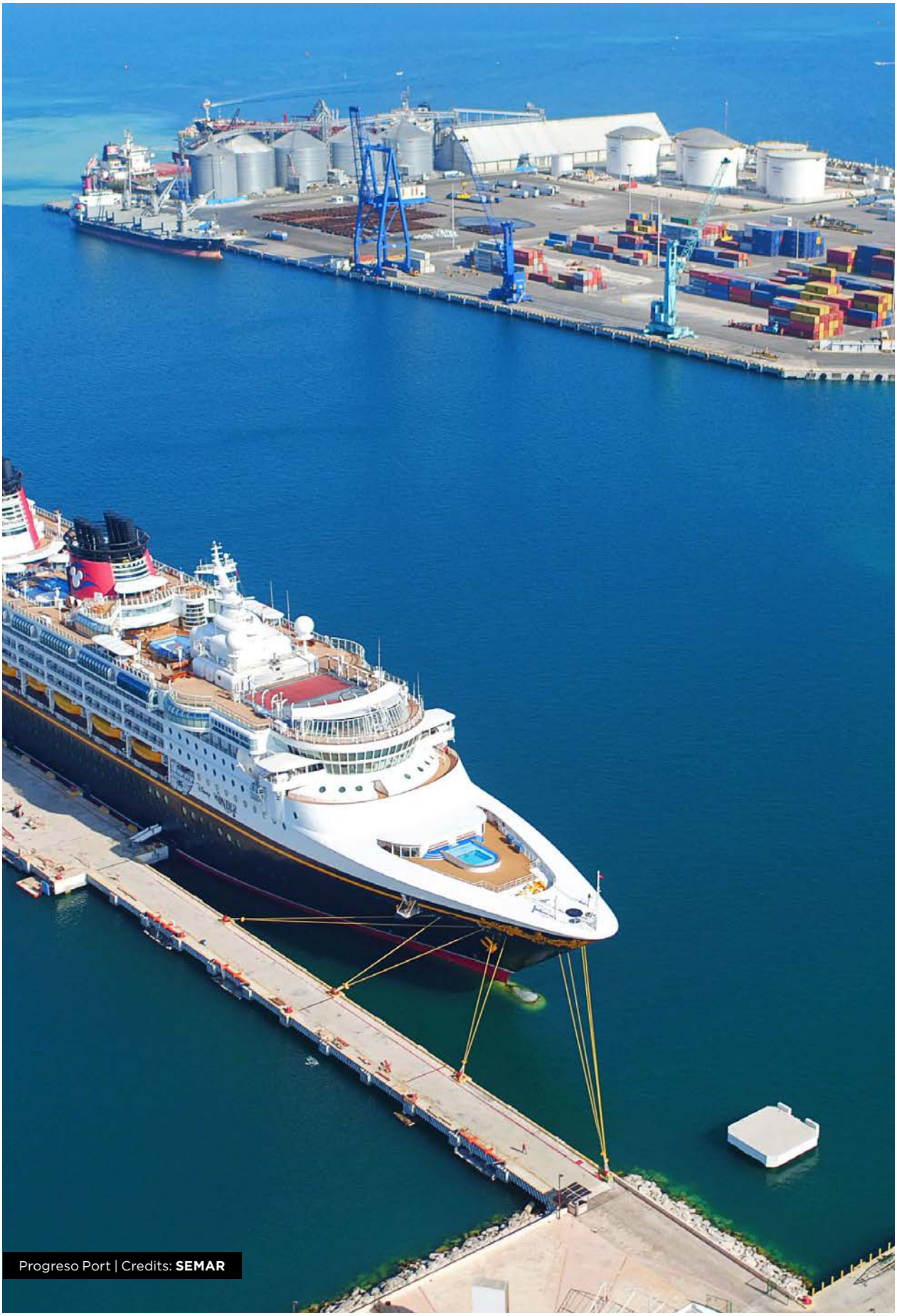
TENDERS AND INVITATIONS MATERIAL RESOURCES

PORT EXPANSION AND MODERNIZATION PROJECT OPPORTUNITIES

Dredging of the construction of the navigation channel, ciaboga dock, and operational docks, as well as the filling and leveling of a 20-hectare area for new terminals; extension of piers 6 and 7; construction of two new docks measuring 600 and 300 meters respectively. The port's depth will increase from 11.75 to 14.40 meters.

The Port of Progreso has multiple-use docks, a dry warehouse and a refrigerated warehouse, among others. The new business opportunities for the ASIPONA are divided into two large areas: commercial and tourist. In both cases, in addition to the business lines, value-added services have been identified to offer an adequate level of attention to different terminal users, commercial or tourist, that will allow them to expand their range.

[9] https://www.puertosyucatan.com/



Progreso Port | Credits: **SEMAR**

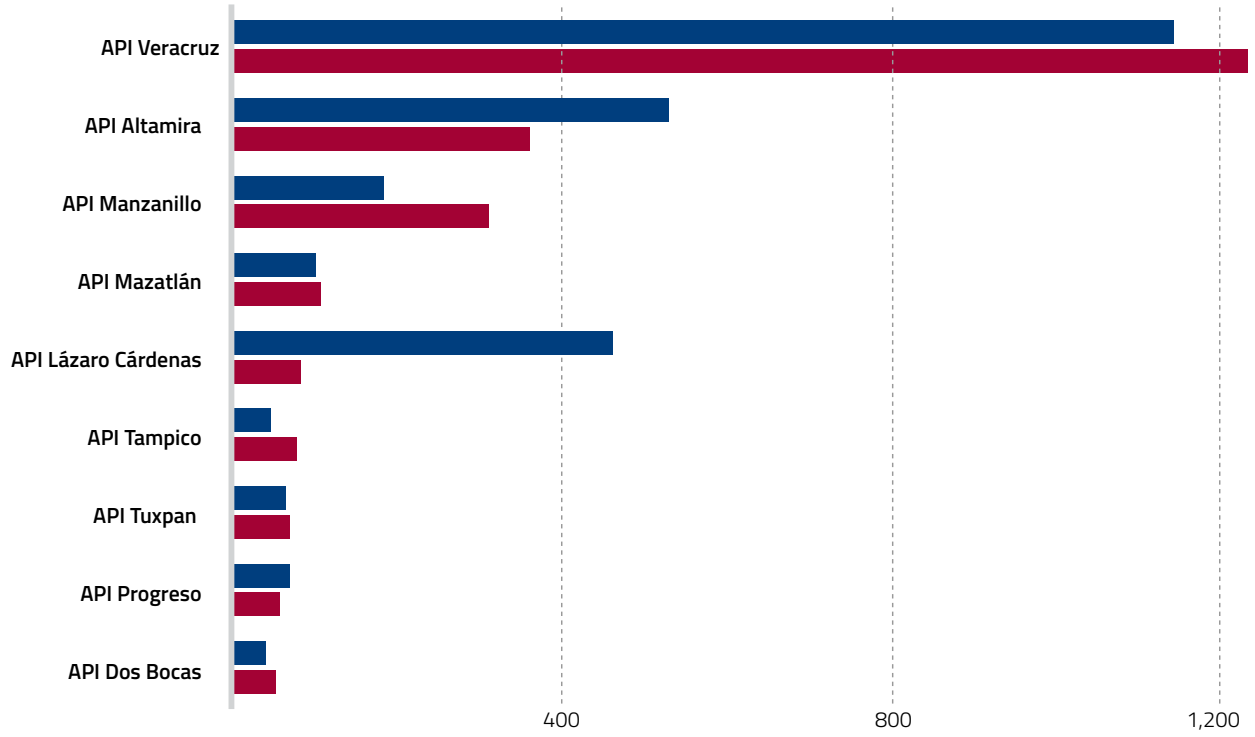
Investment and Projects

The nine APIs that will have resources for investments were those that were approved a budget for this year, whereas other ports, such as Ensenada, Puerto Vallarta, Topolobampo, Guaymas, and Puerto Madero will run out of budget for investment projects for the second consecutive year.

The Integral Port Administration (API) of Manzanillo, the largest port in the country by cargo transported, will have a budget totaling MX$310 million in 2022, representing 72 percent more than the amount approved for 2021, considered the first fiscal year administered by SEMAR, which assumed control of the ports last June. This is the largest increase among the 14 APIs that SEMAR currently manages.

According to the 2022 Federal Expenditure Budget Project, resources will be allocated for the maintenance of the breakwaters in the access channel of the Laguna de Cuyutlan Port, in addition to the maintenance dredging in the San Pedrito and Laguna de Cuyutlan Inland Port. These nine APIs will have a budget of MX$2.4 billion, 10 percent below the budget approved for last year.

Budget assigned variation 2021-2022 (thousand)



Source: **PEF 2021, PPEF 2022.**

There are currently 48 open projects for the development and conservation of infrastructure with public resources, including:

Source: **CGPMM 2022**

Port	Stage	Business Lines	Projects	Value
Lazaro Cardenas	Including projects under analysis and revision.	Fluids, Petroleum, Containers, Automotive, Agri Bulk, Mineral Bulk, General cargo.	1	US$23.3 million
Progreso	Including projects under analysis and revision.	Cruise, Fluids, Petroleum, Container, General cargo, Agri Bulk.	10	US$28.1 million
Guaymas	Including projects under revision and pending budget sufficiency with fiscal resources.	Fluids, Petroleum, Containers, Agri Bulk, Mineral Bulk, General cargo.	1	US$21.2 million
Mazatlan	Including projects under revision and pending budget sufficiency with fiscal resources.	Petroleum, Containers, Automotive, General cargo.	3	US$51.14 million
Puerto Vallarta	Including projects under revision and pending budget sufficiency with fiscal resources.	Cruise.	1	US$21.8 million
Chiapas	Including projects under revision and pending budget sufficiency with fiscal resources.	General cargo, Cruise, Containers, Agri Bulk.	2	US$5.14 million

Port	Stage	Business Lines	Projects	Value
Dos Bocas	Including projects in revision and pending budget sufficiency with fiscal resources.	Fluids, Petroleum, Containers, Automotive, Agri Bulk, General cargo.	3	US$323 million
Veracruz	Including projects in revision and pending budget sufficiency with fiscal resources.	Containers, Automotive, Fluids, Petroleum, Agri Bulk.	3	US$342 million
Tuxpan	Including projects in revision and pending budget sufficiency with fiscal resources.	Petroleum, Fluids, General cargo, Agri Bulk.	1	US$23.4 million
Tampico	Including projects in revision and pending budget sufficiency with fiscal resources.	Petroleum, Fluids, General cargo, Agri Bulk.	4	US$13.40 million
Ensenada		Fluids, Cruise, Containers, General cargo	3	US$3.2 million
Topolobampo		General cargo, Petroleum, Agri Bulk.	2	US$13.3 million
Altamira		Fluids, General cargo, Containers, Agri Bulk, Mineral Bulk, Fluids, Automotive.	6	US$126.5 million
Manzanillo	The investment of the Expansion project in Vessel II of the Cuyutlan Lagoon is not considered, which is under analysis and evaluation.	Containers, Cruise, General cargo, Fluids, Petroleum, Agri Bulk.	1	US$14.9 million
Not yet granted ports	Estimated in the General Criteria for Economic Policy (CGPE). Estimated six-year public investment.	????	6	US$126.5 million

Investment and Projects

In 2021, 57 percent of total private investment was allocated to the transportation of hydrocarbons, 26 percent to mineral bulk, and 8 percent to containers.

This investment was divided into two areas: Gulf of Mexico, representing 29 percent of the total investment with 59 projects, and the Pacific area, representing 71 percent of the total private investment with 53 projects. The total investment was US$19.5 billion.

Some examples where private investments have been allocated are the Ensenada Port, with the construction and modernization of its facilities and increasing a docking position for a total of US$64.6 million. Another example is the Progreso Port, with a commercial tourism development project worth US$4.9 million.

Another investment destination is Puerto Vallarta, with five different tourism improvement projects totaling US$22.6 million.

Cabotage and short sea shipping (tmcd)

It is a priority for Mexico's government to develop maritime roads. This is why the Logistics Platform of the Pacific is considered a distribution opportunity for agri-food products aimed at boosting competitiveness as well as national and international trade diversification with the objective of positioning strategic advantages of transporting goods by sea supplying and complemented with ground transportation. In 2020, only 8 percent of the cargo belonged to cabotage traffic on the Pacific coast, while 75 percent went to international traffic.

In June 2020, the SCT launched the Maritime Highways program, a strategic project aimed at increasing the transportation of goods via short routes between Mexican ports and neighboring countries. The first maritime highway constitutes the ports of Tampico, Veracruz, Progreso and Santo Tomas de Castilla, aimed at increasing cargo flow, reducing costs and generating employment in the south-southeast regions of the country. Mexico has 3 million square kilometers of sea heritage, an area 25 percent greater than the Mediterranean Sea.

The Mesoamerica Project is an integration development program made up of 10 countries where the Transport Committee seeks to increase connectivity between regional economies by improving road infrastructure, sea, port, and airport transport services. The Short Distance Shipping (TMCD) has been promoted since 2008 through the Mesoamerican Agenda for Transport, Mobility, and Logistics, where specific actions have been published in the Regional Action Plan for public and private actors for the implementation of Short Sea Shipping in Mesoamerica.

The lack of an intermodal approach to transport infrastructure in Mexico means that cabotage and TMCD do not exploit their potential for the national distribution of goods as well as to neighboring countries. Currently, world maritime trade has developed countless logistics chains that have overturned the paradigm that maritime transport over long distances is considered the most economical, replacing it with one that complies with just-in-time principles and allows zero inventory, which governs many of today's industrial production activities.

This represents a major necessity for a connected system between Mexico's ports and the improvement of maritime chains, as well as better equipment and human talent capable of managing supply chain efficiency.

Other Projects that impact maritime transport

+ A letter of intent has been signed in Florida, establishing a working group with the Council of Ports of Florida.
+ Ensenada-San Diego Bridge is analyzing the possibility of developing a ferry route between the Port of Ensenada and San Diego.
+ World Logistics Passport. The Ministry of Economy (SE) has signed a Memorandum of Understanding sponsoring the loyalty program designed to facilitate the flow of global trade.[10]

[10] https://www.gob.mx/se/articulos/mexico-formara-parte-del-programa-world-logistics-passport-284365?idiom=es

Dos Bocas Port | Credits: **SEMAR**

3 ASIPONAS (Former APIS)

The General Directorate of Development and Port Administration conducts, coordinates, and promotes the planning, programming, and evaluation actions for the promotion of the integral development of the 14 federal APIs sectored to the Ministry of Communications and Transport. These are directed and controlled by their shareholders, their boards of directors and their administrative structures, who define rules and procedures for decision-making in corporate matters.

The APIs are constituted as priority public companies responsible for the planning, programming, development, use, and exploitation of the port in concession. They are self-sufficient, productive, and competitive.

The Institutional Program of Integral Port Administration of Dos Bocas, S.A. de C.V.[11]

Type of governance: (Federal-SCT)
3 Ports: Villahermosa, Frontera, Sánchez Magallanes.
Terminal: Chiltepec.

The Port of Dos Bocas located in the state of Tabasco, on the southern coast of the Gulf of Mexico, stands out for its excellent geographical location, since it provides immediate cargo connectivity with the most important oil cities in the region, through roads and the international airport of the city of Villahermosa.

TENDERS

Total investment: US$323 million, aimed at strengthening and promoting coordinated actions with the authorities that deliver operational, administrative, or law-mandated activities in the Port Area. Spaces have been allocated in an orderly manner that ensures their correct link with the port community and fulfillment of their functions.

The port's main sources of revenue during the 2015-2019 period were port infrastructure usage fees, CPDO and PSPC contract revenue, which accounted for 68.1 percent and 31.9 percent of total revenues, respectively.

It is estimated that the source for resources generated by Dos Bocas API will remain stable during the planning of the Institutional Program, since it derives mainly from the fees charged for the use of port infrastructure, as well as consideration for the Partial Assignments of Rights and Obligations.

PORT'S ADVANTAGE

+ Availability of industrial land aimed at supporting short and long-term investment projects.
+ Specialized qualified port and certified service providers.
+ Ability to create logistics networks to support a range of commercial and industrial cargo.
+ Multipurpose infrastructure to meet the needs of different cargo types according to the projects.
+ Specialized private terminals and facilities.
+ Port specialized in hydrocarbon logistics.

PORT SERVICES.

For the boat:

+ Pilotage.
+ Trailer.
+ Mooring of ropes.
+ Fumigation.
+ Provisioning.
+ Garbage and hazardous materials collection.
+ Drinking water supply.
+ Fuel supply.
+ Water disposal
+ Residual.
+ Repairs afloat.
+ Cleaning of tanks and structure of boats.

Charge:

+ Maneuvers.
+ Heavy Lift.
+ Customs agencies.
+ Weighing.
+ Equipment rental.
+ Consignee agencies.

[11] https://www.puertodosbocas.com.mx/

Related services:

- Electronic data interchange.
- Ground transportation of passengers.
- Maintenance of fire equipment.
- Spill barriers.
- Rental of machinery and specialized equipment.

Developed projects:

- Cargo project management is heavy and oversized.
- Gravel management for oil projects.
- Loading and unloading of mineral bulk: Coal – Petroleum, Coke – Barite.
- Specialized maintenance and repair of oil platforms.
- Logistical support for offshore oil activities.

The Institutional Program of Integral Port Administration of Guaymas, S.A. de C.V.[12]

Type of government: (Federal-SCT)
5 Ports: Yavaros, San Carlos, Puerto libertad, Puerto Pe asco, Golfo de Sta. Clara.
1 Terminal: Sanchez Taboada

TENDER.

Total investment: US$21.1 million. The Port of Guaymas is a multipurpose option that connects maritime trade between northwest Mexico and the southwestern US, and with Asian seaports.

The port can receive up to six vessels simultaneously at multiple docks, with a water depth of 14.7 meters.

Thanks to its infrastructure, it can handle high cargo volumes. The port's principal business line is mineral bulk, transporting 4 million tons annually. An expansion project will enable the port to acquire 2 million tons of additional capacity.

The port supplies fuels to production and consumer centers throughout Mexico's northwestern region.

It maintains a high level of productivity with regard to the movement of agricultural bulk, thanks to its infrastructure and specialized port equipment.

The port has posted sustained growth of its containerized cargo business line.

COMPETITIVE ADVANTAGES.

- Railway circuit that operates 24/7.
- Areas for Logistics activities are located only 10km from the port.
- Double stack operations of containerized cargo.

SUSTAINABLE PORT.

Privately-owned companies, both national and foreign, operate inside the port through a commercial contract with an average duration of 20 years, which is extendable. No exclusivity rights are granted, thereby permitting open competition.

This historic port facility occupies an area of 73 hectares, with over 10 hectares available for the development of new businesses. It also has a large reserve of land that occupies 1,707 hectares of the maritime zone, obtained through an additional concession.

In regard to its environmental sustainability, it has undertaken a policy program, which the entire port community is committed to implementing.

CONSOLIDATED PORT EXPERIENCE.

Mineral bulk, agricultural bulk fluids, containerized cargo, general cargo, oversized, heavy IMO requiring special handling

- Specialized integral services.
- Loading and unloading maneuvers.
- Delivery and reception to/from truck or railway.
- Ship-yard-ship side transfers.
- Weighing.
- Warehousing.
- Shoveling.
- Pre-inspections.
- Inspection and classification of empty containers.
- Consolidation and deconsolidation of containers.
- Container maintenance and repairs.
- Connection for reefers.
- CCTV to monitor merchandise.
- Gamma-ray equipment for container inspection.

[12] https://www.puertodeguaymas.com.mx/

Guaymas Port | Credits: **SEMAR**

GUAYMAS: THE LOGISTICS CONNECTION US – MEXICO – ASIA.

Due to its geographic location, the Port of Guaymas can deal with the growing demand for port services from the southwestern US. It maintains trade relationships with ports in Asia.

Through a corridor that provides fiscal incentives, cargo, such as minerals coming from Arizona, Utah, and New Mexico, is transported to the US and Mexico by regular railway service with direct access to docks at the Port of Guaymas, where it is loaded into ships bound for Asia.

The Institutional Program of Integral Port Administration of Mazatlan, S.A. de C.V.[13]

Type of governance: (Federal-SCT).
4 Ports: Altata, El Sabalo, Escuinapa, Teacapan.

TENDER.

This port caters to Mexico's west coast, up to the northern central region of the country and the southern US.

This multipurpose port is located in Sinaloa. Its main activities are agriculture, livestock, fishing, and mining.

The state of Sinaloa has the highest value in fishing production in the country and the Port of Mazatlan is located here. The port provides port infrastructure to one of the largest Mexican fishing fleets.

Mazatlan is a multipurpose commercial, tourist, fishing, and oil port that has regional influence. Its operation is fundamental to the economy of northern Mexico, especially with the handling of agricultural products, fisheries, automobiles, and industrial manufactured goods.

The strategic objectives consider the principles of competitiveness, quality, and efficiency in the provision of port services, as well as their corresponding development goals, strategies and lines of action.

THE OBJECTIVES ARE:

+ Promote the growth, diversification, and competitiveness of the port.
+ Contribute to making logistics chains more efficient.
+ Increase investment in infrastructure and equipment.
+ Strengthen the conditions of competition within the port.
+ Promote greater private investment participation.
+ Improve port-city relationship.
+ Contribute to the economic development of the region.

PORT INFRASTRUCTURE.

+ Ferry terminal.
+ Tourist terminal.
+ Fuel transfer terminal.
+ Fridge.
+ 5 General cargo warehouses.
+ 1 Warehouse specialized in steel.
+ Operator terminal.
+ Containerized cargo.
+ General load.
+ Car hire.
+ Fuel transfer.
+ Fishery products.
+ Perishables.
+ Tourist-commercial.
+ Shipyard.
+ Sportfishing

CONTAINERIZED CARGO.

+ Wood.
+ Fertilizers.
+ Chickpeas.
+ Fishmeal.
+ Rolls of sheet.
+ Mango pure

PORT ACTIVITY.

Predominant economic activities in the region:

+ Sinaloa: Leader in food production.
+ Agriculture.
+ Fish production.
+ Animal husbandry.
+ Tourism.
+ Industry.
+ Mining

MAIN CARGO MOVEMENTS:

+ Oil and derivatives.
+ Fishing.
+ Cruises.

[13] **https://www.puertomazatlan.com.mx/**

- Ferries.
- Rolls of sheet.
- Rails.
- Rod.
- Salt.
- Tuna.
- Steel Plates.
- Chickpeas.
- Fishmeal.

CONNECTIVITY.

Northern Economic Corridor:

Sinaloa, Durango, Coahuila, Chihuahua, Nuevo Leon, Zacatecas, and Tamaulipas make up the Northern Economic Corridor (COEN) linked by the Mazatlan-Matamoros highway network, considered the most important road infrastructure project being built in Mexico.

The port of Mazatlan will be the gateway for goods entering mainly from Asia, which can then be transported by road to the Matamoros-Texas border catering to the southeastern US market.

RAIL CONNECTIVITY:

Connectivity to 51 stations, 696km of tracks, with connections to central and northern Mexico.

The Pacific Railway that connects with the Chihuahua Railway has daily services to Nogales, Mexicali, and Guadalajara.

The Institutional Program of Integral Port Administration of Puerto Madero, S.A. de C.V.[14]

Type of governance: (Federal-SCT)

Total investment: US$24.8 million. Port of Madero is considered one of the Top 16 ports in Mexico, due to its foreign trade activity, in addition to providing tourism activities for those who seek a close encounter with nature and the Chiapas culture.

Chiapas is viewed as an ideal location to develop new business opportunities since it has an efficient port infrastructure: Multipurpose Terminal, Container Terminal, Agricultural Bulk Terminal, Fishing Docks, Fuel Supplier and IFO and a Comprehensive Cruise Service Center.

CONNECTIVITY.

- Tapachula.
- International airport.
- Mexico-Guatemala border.
- Railway to cargo terminal.

TERRESTRIAL

The port has road access aimed at accelerating internal traffic in the handling of cargo, while avoiding risks in the operation for various types of goods and port services.

Fifty kilometers from the border of Suchiate II is Ciudad Hidalgo, considered Mexico's most important southern border crossing connecting Central America.

The Aduna Suchiate II is headquartered in Ciudad Hidalgo, part of the municipality of Suchiate, Chiapas, which is in charge of Talisman, and Port Chiapas' customs areas, the Dr. Rodolfo Robles Valverde International Bridge, and Tapachula´s international airport.

RAILWAY

With the railway's rehabilitation, the successive articulation between different modes of transport is possible, aimed at integrating operations more effectively into the distribution chain. In addition, the ability to transship goods from the Pacific Ocean to the Atlantic Ocean increases the port's competitiveness and strengthens its position as an efficient logistics alternative for the region.

The rail links cover the routes Puerto Chiapas-Los Toros-Ciudad Hidalgo and Puerto Chiapas-Los Toros-Ixtepec to connect to Salina Cruz or to Medias Aguas-Coatzacoalcos-route Chiapas-Mayab and Medias Aguas-Centro.

MARITIME

Port Chiapas can function as a transshipment port fulfilling the function of the Panama Canal by interconnecting the two oceans through a maritime and

[14] http://www.puertochiapas.com.mx/

Port of Madero | Credits: **SEMAR**

train intermodal combination, boosting commercial and economic trade by providing a shorter transit route.

SHIP SERVICES.

+ Tugboat.
+ Provisioning.
+ Potable water supply.
+ Fuel supply.
+ Hazardous waste collection.
+ Wastewater collection.
+ Garbage collection.
+ Electrical energy.
+ Mooring and unmooring of ropes.
+ Repair.
+ Fumigation.
+ Vigilance

CARGO SERVICES.

+ Loading/Unloading.
+ Equipment rental.
+ Maneuvers.
+ Consignee agencies.
+ Customs agencies.
+ Storage.
+ Electricity.
+ Weighing

POTENTIAL PRODUCTS.

+ Agricultural Bulk: Corn, wheat, soy.
+ Mineral Bulk: Baria, magnetite, ilmenite, cement, fertilizers, iron, steel, titanium.
+ Fluids: Gas, premium and magna gasoline, diesel, oils.
+ General Cargo: Coffee, tuna, banana, cattle, wood, steel, rod, pipes, scrapping, RoRo.

TENDERS

The Institutional Program of Integral Port Administration of Puerto Vallarta, S.A. de C.V.[15]

Type of governance: (Federal-SCT)
3 Ports: Nuevo Vallarta, Cruz de Huanacastle, San Blás.
1 Terminal: Chacala.

Puerto Vallarta has three berthing positions that simultaneously serve three top-of-the line cruise ships.

Puerto Vallarta is a tourism destination; therefore, it has the port infrastructure and offers specialized services that cater to the transportation of passengers by sea.

TENDERS.

PUERTO VALLARTA SERVES THREE LINES OF BUSINESS:

Cruises: These are considered the top business line for Puerto Vallarta, which is part of the Mexican Riviera. Other tourism hot spots along the Riviera include the port of Cabo San Lucas in Baja California Sur, Mazatlan and Sinaloa. Many routes consist of seven-day cruise itineraries, where passengers board from ports located in Los Angeles, Long Beach, and San Diego, California, which operate as home ports, mainly for cruise passengers from the US, Europe and Asia. Occasionally, Puerto Vallarta caters to cruises derived from other routes, such as other world routes. On the Mexican coast of the Pacific Ocean, Puerto Vallarta ranks as the third port, after Ensenada, Baja California, and Los Cabos in Baja California Sur, with the highest number of passenger arrivals. Since 2014, the port has welcomed more than 240,000 cruise passengers.

Cabotage tourism: In the Bay of Banderas, Jalisco, where the port of Vallarta is located, tourism activities are very popular. These include boat rides, diving, water skiing, snorkeling and skydiving. Puerto Vallarta serves more than 525,000 tourists a year. These tourists are of national and international origin.

Tourist marinas: Three tourist marinas operate in the Port of Vallarta, catering to recreational and sport fishing boats of national and foreign origin. These boats come mainly from the West Coast of the US. The port has 524 slips for these types of vessels, which, for the most part, are permanently occupied.

CONNECTIVITY.

The city and port are connected by two roads: these are Puerto Vallarta to Compostela at 132km. From Compostela to Tepic and to Guadalajara, with a distance of 38km and 237km, respectively. The road from Puerto Vallarta to Manzanillo is 270km.

The main mode of transportation used by Puerto Vallarta national visitors is the bus or car. For international

[15] https://www.puertodevallarta.com.mx/

tourists, air travel represents the most important means of transportation, as well as yachts or cruise ships.

The Institutional Program of Integral Port Administration of Tampico, S.A. de C.V.[16]

Type of governance: (Federal-SCT)

Tampico is one of the main ports located on Mexico's east coast, serving as an entry and exit port for mining products, petrochemicals, steel, minerals, agricultural bulk, and oversized structures, among other industrial products. The port has 11 berthing positions with 2,147 linear meters in its public terminals and specialized equipment for the handling of a variety of goods.

The Port of Tampico offers extensive shipping services that link it with more than 100 countries around the world, including Canada, the US, Cuba, the Dominican Republic, Brazil, Venezuela, Australia, Singapore, in addition to Europe.

Total investment: US$13.4 million. It has become the entry and exit port for minerals, petrochemical, steel, wood, and other industrial products located in eastern Mexico.

Projects to develop: channel the safety and operability of cargo handling.

TENDERS

The Institutional Program of Integral Port Administration of Topolobampo, S.A. de C.V.[17]

Type of governance: (Federal-SCT)

Topolobampo caters to Sinaloa's agricultural production and cabotage supplying general cargo and fuels, in addition to transporting passengers from Sinaloa and Baja California Sur.

The Port of Topolobampo serves the following lines of business:

+ Oil and derivatives.
+ General load.
+ Mineral bulk.
+ Agricultural bulk.

Total investment: US$13.3 million. The port has a privileged position for handling products from eastern Mexico headed to the south of the US. Projects include logistics and operational efficiency of the port.

TENDERS

The Institutional Program of Integral Port Administration of Tuxpan, S.A. de C.V.[18]

Type of governance: (Federal-SCT)

Tuxpan is a multipurpose commercial port, specializing in the handling of imported petroleum fuels, agricultural and mineral bulk, general load, and fluids transported to central Mexico. The port has a logistics support platform for the offshore oil industry, including five terminals as well as construction and refreshment yards.

HINTERLAND.
Its hinterland covers Tamaulipas, Veracruz, Tlaxcala, Hidalgo, Puebla, Mexico City, State of Mexico, Morelos, Queretaro, Guanajuato, Jalisco and San Luis Potosi.

FORELAND
Its foreland is oriented to countries such as the US, Canada, Cuba, Brazil, Holland, Finland, Israel, Italy, Russia, Ukraine, Belgium, and Vietnam.

Total investment: US$23.4 million. It is the first port for the import of fuels.
Projects to develop: expansion of public dock to aid the efficient handling of goods.

TENDERS

[16] https://puertodetampico.com.mx/
[17] https://puertodetampico.com.mx/
[18] https://puertotuxpan.com.mx/

Tuxpan Port | Credits: **SEMAR**

The Institutional Program of Integral Port Administration of Coatzacoalcos, S.A de C.V[19]

Type of governance: (Federal-SCT)
3 Ports: Pajaritos, Minatitlan and Nanchital.

The Port of Coatzacoalcos has a privileged geographical location in the region of the Isthmus of Tehuantepec. It lies at the end of the shortest land route between the Pacific Ocean and the Gulf of Mexico, with a total distance of 302km. It is located on the left bank of the river that bears its name, flowing into the Gulf of Mexico.

The municipality of Coatzacoalcos is located in the southern part of Veracruz. It has an area of 471.16km2, representing 1 percent of the state's total land.

It borders the municipalities of Pajapan, Cosoleacaque, Minatitlan, Ixhuatlan del Sureste, Moloacan, and Las Choapas; to the north lies the Gulf of Mexico and to the east the state of Tabasco.

The Port of Coatzacoalcos is located in the Isthmian Zone and the southeastern border of Veracruz. Geographically, it is considered a strategic point that connects the Gulf of Mexico with the Pacific Ocean by land to the cities of Tehuantepec and Salina Cruz, Oaxaca.

To the north, the port area borders housing areas belonging to the city of Coatzacoalcos. To the south are the shipyards belonging to SEMAR, to the east is the left bank of the river, and to the west are city neighborhoods.

The port of Coatzacoalcos covers an area of 352 hectares, of which 122.3 hectares are land and 229.7 are water.

The port of Laguna de Pajaritos has a land area of 71 hectares and 237 hectares of water.

TENDERS

The Institutional Program of Integral Port Administration of Salina Cruz, S.A de C.V[20]

Type of governance: (Federal-SCT).
2 Ports: Puerto Angel, Puerto Escondido.

Salina Cruz is considered a multimodal port located south of Mexico's Pacific Ocean. The port allows the fastest connection with the Atlantic Ocean through a 319km land bridge by road and 302km by rail, linking freight traffic through this corridor with the port of Coatzacoalcos.

Salinas Cruz is equipped with infrastructure and port equipment for the handling of containerized cargo, agricultural bulk, mineral bulk, general project cargo, oil and its derivatives.

Considered an operating port, it is through its facilities that commercial cargo is mobilized from the south and southeast regions of the country. In addition, oil is distributed on Mexico's Pacific coast and fuel oil, jet fuel, ammonia, diesel, and crude oil are exported as well.

BUSINESS OPPORTUNITIES
The port of Salina Cruz has reserve areas that include 14.23 hectares for possible expansion of the container yard, including a rail connection located in the eastern part of the port; in addition to an area of almost 2 hectares located in the northern part of the Industrial Fishing Zone.

Currently, the port has steady cargo movement. For this year, however, there are expectations for a significant increase in cargo volume from the expansion of the production and distribution of oil and derivatives of the Salina Cruz Refinery, plus traffic growth of export and import containers related to the petrochemical industry of the Cosoleacaque region, in addition to increases in cargo movements associated with wind farm projects in the Ventosa area and the growth of mining activities in the state.

TENDERS

[19] https://www.puertocoatzacoalcos.com.mx/

[20] https://www.puertosalinacruz.com.mx/espi/0000001/inicio

Integral Port Administration of Baja California Sur S.A de C.V[21]

Type of governance: (State)
7 Ports: Santa Rosalia, Puerto Escondido, Loreto, San Carlos, La Paz, Pichilingue, Adolfo Lopez Mateos.

The region is Mexico's largest coastal extension, running 830km along the Gulf of California and 1,400km along the Pacific Ocean, representing 17 percent of the country's coasts.

This area hosts tourism activities, fishing, trade, and the mining sector, as well as the agricultural industry, which are closely related to maritime transportation.

TENDERS

Integral Port Administration of Campeche S.A de C.V[22]

Type of governance: (State)
8 Ports: Nuevo Campechito, Emiliano Zapata, Isla del Carmen, Sabancuy, Champoton, Seybaplaya, Lerma, and Campeche
1 Terminal: Isla Aguada.

As a state API, the port company develops and provides maintenance to infrastructure that supports fishing communities located on the state's coast.

The Port System of Campeche is made up of ports, enabled areas, shelters, and minor port projects along the coast of Campeche, from Nuevo Campechito on the border with Tabasco to Isla Arena nearly bordering the state of Yucatan.

APICAM seeks to consolidate the activity of the state's ports in a comprehensive system that maximizes the oil exploitation in the Campeche probe and generates multiple effects for the state's economy, supporting fishing communities and the economically active population that resides along the Campeche coast.

TENDERS

Integral Port Administration of Quintana Roo S.A de C.V[23]

Type of governance: (State)
9 Ports: Isla Cozumel, Isla Mujeres, Puerto Juarez, Cancun, Puerto Morelos, Playa del Carmen, Puerto Aventuras, Chetumal, Holbox.
5 Terminals: Punta Venado, Punta Allen, Majahual, La Aguada, Xcalac.

In the Zaragoza Canal, there is viability for a homeport for first, second, and third-generation ships, ecotourism villas, a marina with 156 ramps, and a cargo terminal, according to Alicia Ricalde Maga a, head of the Integral Port Administration of Quintana Roo (APIGROO), to US investors.

During a promotional tour headed by Gov. Carlos Joaquín González, Ricalde Maga a presented these projects at the Port of Tampa and Orlando, Florida, where she explained the business opportunities found in the Zaragoza Canal.

During the presentation, Ricalde Maga a emphasized that Quintana Roo would be the gateway to Central America. "We would not only have to look up to North America, but also consider that a business opportunity with Central America would be viable." In addition, the director said that the state has an alliance with the Port of Santo Toma de Castilla in Guatemala, and plans to have one in Roatan, Honduras, are underway.

Type of cargo: container, cruise.

TENDER

Integral Port Administration of Tabasco S.A de C.V[24]

Type of governance: (State)

[21] https://apibcs.com.mx/
[22] https://apicampeche.com.mx/
[23] http://www.apiqroo.com.mx/
[24] https://tabasco.gob.mx/administracion-portuaria-integral-de-tabasco

The Integral Port Administration of Tabasco, is a company with social responsibility that positions the State Port System as a strategic point in the Gulf of Mexico. Its main objective is to improve the services of the Integral Port System of the State of Tabasco, which are based on its oil and fishing industry at the Port of Frontera, which has four lines of business:

Loading and unloading of passengers to platforms and floating ships in the Gulf of Mexico and deepwaters.

Docking and undocking of ships.

Sale of potable water.

Fishing pier concessioner to 20 cooperatives that do not pay rights.

Other viable lines of business could be explored, since it has warehouse infrastructure, including a line of business with PEMEX and concessionaire shipping companies or supply centers that transport and pack their goods.

Currently, the average depth of the 10km Port of Frontera is between 1.8 and 2 meters, and its main advantage is that it is half the distance to PEMEX's platforms in the Gulf of Mexico than that of Dos Bocas and Isla del Carmen. The port also promotes ecological tourism.

TENDER

Integral Port Administration of Tamaulipas S.A de C.V[25]

Type of governance: (State)
1 Port: Matamoros.

The port of Matamoros is located in a strategic area, since it not only caters to activities related to the Energy Sector but also to other economic activities that rely on sea transportation to optimize travel time to production and consumption centers. The port of Matamoros is a maritime transport port and has a logistics corridor, in addition to all the necessary conditions to attend larger vessels; therefore, the port of Matamoros will be complemented with other ports located in the Gulf of Mexico.

ENERGY POTENTIAL:

+ State area: 80,249km.
+ Oil potential: 59 percent.
+ Gas shale.
+ Associated and Non-Associated Gas: Oil on land and in shallow waters.
+ Deepwater oil.

TENDER

Integral Port Administration of Cabo San Lucas S.A de C.V[26]

Type of governance: (FONATUR)
2 Ports: San Jose del Cabo, Los Barriles.

Located at the southern tip of the Baja California Peninsula, Cabo San Lucas is considered the main port of call for cruise ships traveling through the Mexican Riviera and the Sea of Cortes. In the absence of a traditional cruise ship dock, the API offers a range of tender services for the Port of Cabo San Lucas.

The API was established to oversee the planning and development of port estates and services. It also offers a tender dock for 12 vessels simultaneously, tenders, mooring, fuel supply, provision, three private marinas, and a 150m area for loading and unloading passengers. While it remains autonomous in its management, the API works with governing bodies to ensure the highest level of efficiency and competitiveness for the port of Cabo San Lucas.

The port is nestled near the famous arch at Land's End, a dramatic rock formation at the end of the peninsula where the Sea of Cortes and the Pacific Ocean meet.

TENDER
TENDER

[25] https://www.tamaulipas.gob.mx/desarrolloeconomico/puertos-de-tamaulipas/

[26] https://puertoloscabos.com/

Integral Port Administration of Huatulco S.A de C.V[27]

Type of governance: (FONATUR)

To include the coasts of Oaxaca into Mexico's economic development and strengthen the creation of beach destinations in Mexico's southern Pacific, the nine bays of Huatulco were chosen for their unique characteristics, their exceptional beauty, and their proximity to important cultural and natural attractions, without altering the ecology of the region. Surrounded by the jungle of the Sierra Madre del Sur, these nine bays include San Agustín, Chachacual, Maguey, Organo, Santa Cruz, Chahue, Cacaluta, Tangolunda and Conejos. In addition to its 36 beaches, the coast constitutes excellent tourism infrastructure and hosts a variety of attractions.

The Huatulco Bay project, located in southern Oaxaca, is the most recent of the Integrally Planned Centers (CIPs) powered by the National Fund for the Promotion of Tourism (FONATUR). Its operation began at the end of 1988. Huatulco has a coastal strip that runs 35km in length and 7km in width at the inner end of the Sierra Madre del Sur.

Located 282km from the city of Oaxaca, the state capital, Bahias de Huatulco has an international airport with direct flights from Mexico City, in addition to connections with other main cities in the country and abroad.

TENDER

Integral Port Administration of Acapulco S.A de C.V

Type of governance: (Federal-SCT) since 2021
4 Ports: Ixtapa, Zihuatanejo, Vicente Guerrero, Puerto Marques.

The main objective is welcoming tourism cruises, the development of nautical tourism activities, and the operation of vehicles.

The port has ISO-9001/2008 certification from the Mexican government in compliance with the ISPS code. It is in the process of obtaining environmental certification under the Environmental Audit scheme by SEMARNAT.

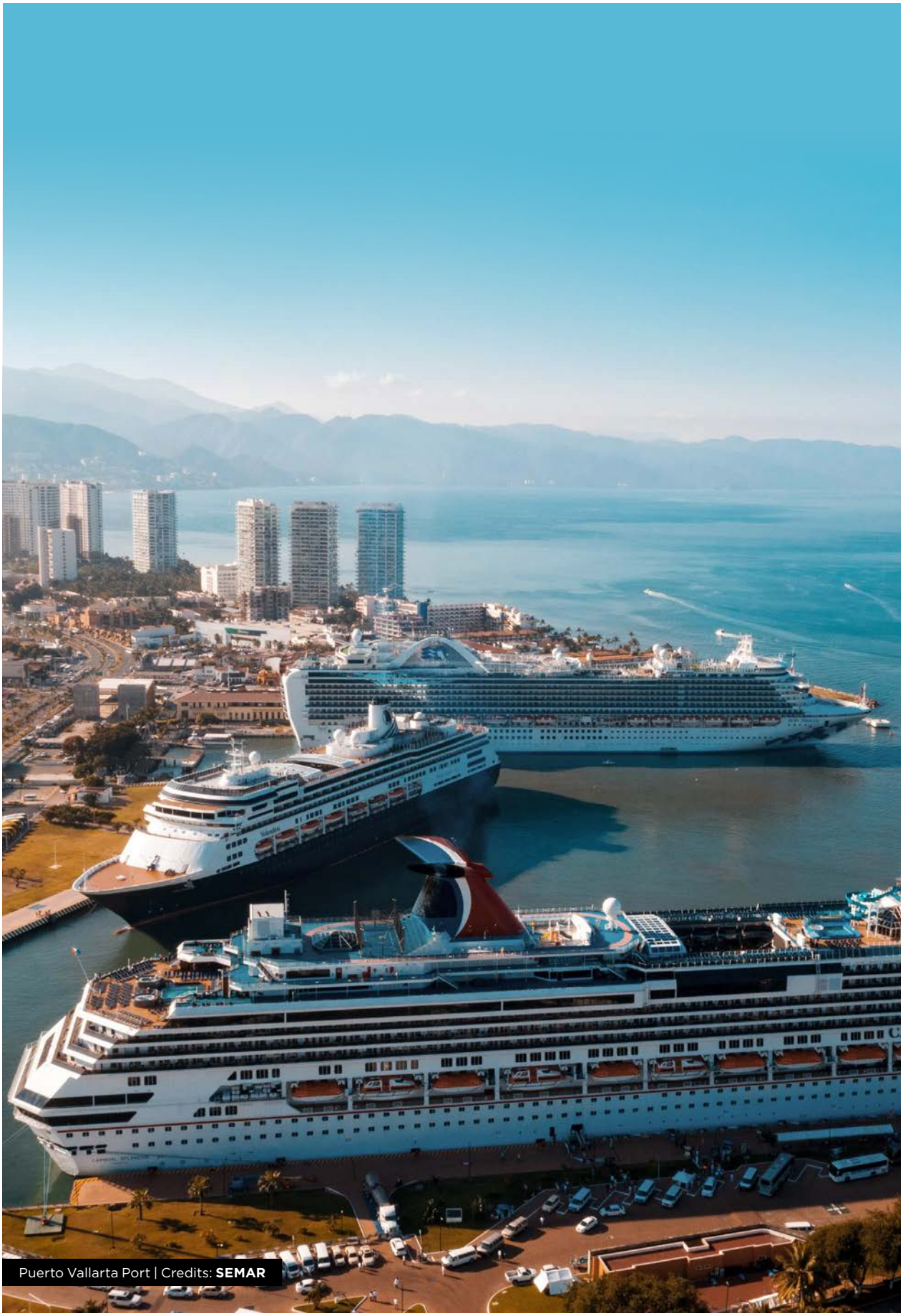
[27] https://www.gob.mx/ftm/acciones-y-programas/api-huatulco

APIS/ASIPONAS	Governance	Main Cargo	Investment Plans	Opportunities for providers and service providers
Asipona Altamira	Federal (National)	Petrochemicals, Loose cargo, Ro-Ro.	*The expansion of 2 multipurpose terminals. *2 new terminals hydrocarbons. *New terminal for the platform construction oil.	*Multiple uses, bulk, and liquefied natural gas. *Container sourcing companies. *Automotive development. *Offshore service providers. *Logistics companies.
Api Coatzacoalcos	Federal (National)	Mineral and Agri Bulk. Petrochemicals, Fluids.	*Infrastructure strengthening. *Regional economic boost for the benefit of the Isthmus of Tehuantepec. *Increase the sustainability of the port.	*Automotive development. *Construction services. *Logistics consultancy. *Offshore service providers.
Asipona Dos Bocas	Federal (National)	Petroleum and derivates.	*Mineral and agricultural bulk cargo handling. *Comprehensive Maintenance and Repair Service to Platforms. *Boat Maintenance and Repair. *Fluid handling and storage. *Dry and refrigerated containerized cargo. *Logistics services. *Specialized services to the oil industry. *Manufacturing and processing plants. *Fiscal Precinct. *Development of regular coastal and high-altitude routes.	*Shipbuilders. *Logistics companies. *Offshore service providers.
Asipona Ensenada	Federal (National)	Containers, Agri Bulk, Cruise, fishing.	*Containerized Cargo. *Mineral Bulks. *Agricultural Bulks. *Oversized General Load. *Shipyards. *Cruises. *Commercial Fishing. *Sport Fishing.	*Shipbuilders. *Construction of facilities, increasing a berthing position.
Asipona Guaymas	Federal (National)	Petroleum and derivates, Mineral Bulk, Agri Bulk, General Cargo.	*Modernization and Expansion of the Port of Guaymas. *Maritime loads.	*Naval engineering.
Asipona Lázaro Cardenas	Federal (National)	Containers, general, dry, and liquid cargo, vehicles, mineral bulk, among others.	*Increase, optimize and conserve port infrastructure, in order to provide the appropriate conditions that allow the growth of the port supply and its competitiveness. *New international shipping chains.	*Automotive Companies.

APIS/ASIPONAS	Governance	Main Cargo	Investment Plans	Opportunities for providers and service providers
Asipona Manzanillo	Federal (National)	Containers, general cargo, agricultural and mineral bulks, vehicles, perishables, and cruise ships.	*Service contracts for the execution of new infrastructure.	*Offshore service providers. *Infrastructure companies.
Asipona Mazatlán	Federal (National)	Petroleum and derivates, Mineral Bulk, Perishables, Cruise.	*Modernization of the port.	*Shipbuilders. *Ferry companies.
Asipona Progreso	Federal (National)	Containers, Agri bulk, Cruise.	*Dredging. *Dock adjustment.	*Port infrastructure and road improvements. *Shipbuilders. *Maritime transportation.
Asipona Puerto Madero/Chiapas	Federal (National)	Agri Bulk, Mineral Bulk, Fluids, General cargo.	*Contract service for collection, transportation and disposal. Waste management. * Rehabilitation of Hydraulic concrete flooring and preparation of rain sewer. *Dredging. *Maintenance.	*Shipbuilders. *Infrastructure construction.
Asipona Puerto Vallarta	Federal (National)	Cruise and Tourism.	*Maritime Infrastructure. *Execution studies.	*Naval construction.
Api Salina Cruz	Federal (National)	Petroleum and derivates, General cargo, Mineral bulk, Agri bulk, containers.	*Infrastructure rehabilitation and modernization. *Dredging. *Two new large terminals. * Access railway to the port. * Rehabilitation of the oil dock. *Maritime signaling. * New access roads, new security and surveillance system, the rehabilitation of the dissipation slope, and the strengthening and expansion of the container docks.	*Engineering Companies. *Logistics Repair.
Asipona Tampico	Federal (National)	Petroleum and derivates, Mineral bulk, Agri bulk.	*Development of their territories. *Construction and maintenance of competitive infrastructure. *Strategic cargo development. *Innovation and growth in the maritime-port strategic sector.	*Logistics and transport companies (Submarine services, Tugs, fuel and lubricants).

APIS/ASIPONAS	Governance	Main Cargo	Investment Plans	Opportunities for providers and service providers
Asipona Topolobampo	Federal (National)	Passenger, Ro–Ro pax, Petroleum and derivates, general cargo.	*Modernization of courtyards and roads of the port. *Completion of the expansion of the bulk spring. * Expansion of railway spurs and the extension of the access road to the Port Area.	*Fertilizer storage companies and construction of the specialized hydrocarbon terminal.
Asipona Tuxpan	Federal (National)	Petroleum and derivates, Mineral bulk, Agri bulk, General cargo, Fluids.	*Modernization of land and maritime infrastructure.	*Petroliferous and LP gas companies.
Asipona Veracruz	Federal (National)	Containers, Ro-Ro.	*Increase, optimize and conserve port infrastructure *Increase specialization in cargo handling. *Development of berthing infrastructure. *Port expansion.	*Transport companies, importers and exporters distribution centers.
Api Baja California Sur	State	Cruise, Mineral bulk, Fishery.	*Modernization of the port of Pichilingue and construction of offices. *Puerto San Carlos, the modernization of the pier for cruise ships and maintenance of the multipurpose dock. *Plaza de las Ballenas and tourist walker, maintenance and rehabilitation of sighting pier. *Increase the traffic of cargo ships to their ports. *Promote and concession its facilities in the private and social sector, thus privatizing port services and facilities.	*Engineering for the modernization of the port. *Construction companies.
Api Campeche	State	Petroleum and derivates.	*Specialized port terminal for the construction, repair, maintenance and scrapping of ships and oil platforms (Shipyard). *Specialized port terminal for the storage of hydrocarbons. *Specialized passenger terminal for public use. *Specialized logistics terminal for loading and unloading for public use. *Port fuel supply service through Bunkering. *Power supply service through generating plants for the Port of Seybaplaya. *Drinking water supply service through the hydraulic network.	*Expansion of docks and surface. *Terminal Project Offshore Services. *Construction for expansion of the port of Seybaplaya.

APIS/ASIPONAS	Governance	Main Cargo	Investment Plans	Opportunities for providers and service providers
Api Quintana Roo	State	Cruise, container.	* Installation of Photovoltaic System. *Home port for first, second and third generation ships. *Ecotourism villas. *156 comb marina and a cargo terminal.	*Engineering companies.
Api Tabasco	State	Petroleum and derivates.	*Construction of the Mayan Train and Interoceanic Corridor. *Construction of a new port to be the logistics operations center of the oil industry. *Acquisition of Infrastructure and Real Estate. *Infrastructure Construction. *Infrastructure Rehabilitation. *Urbanization Works. *Fuel storage.	*Port logistics transport service companies. *Oil & Gas companies with commercial area.
Api Tamaulipas/ Matamoros	State	Petroleum and derivates.	*Development of transport infrastructure and multimodal logistics. *Expansion of storage and distribution capacity for crude oil and petroleum fuels.	*Energy companies. *Natural Gas Distribution. *Maritime transportation.
Api Cabo San Lucas	Fonatur	Cruise.	*Tender dock for 12 vessels simultaneously, tenders, mooring, fuel supply, provision, three private marinas, and an area of more than 150 meters for embarking and disembarking passengers.	*Maritime transportation *Shipbuilders.
Api Huatulco	Fonatur	Cruise, tourism.	*Tender for engineering works for major maintenance, lighting and surveillance systems. *Tourism Services. *Modernization of Infrastructure for access and mobility in Huatulco.	*Maritime transportation. *Infrastructure companies.
Api Acapulco	Federal (National) since 2021	Ro-Ro, Cruise.	*Port Maintenance.	*Logistics repair.



Puerto Vallarta Port | Credits: **SEMAR**

Conclusions

SEMAR's General Coordination of Ports and Merchant Marine maintains an open-door policy whose main objective is to promote national and international investment. Mexico's ports are working toward development, efficiency, sustainability and safety, as well as fighting corruption. Maritime port security is a key objective. These ports envision a future that is based on strengthening its efforts in regard to gender equality, digitalization of port developments, regulatory compliance, and the monitoring of international standards highly committed to developing the maritime potential of the country in close cooperation with other countries.

The Dutch presence in Mexico is relevant, as they are significant providers for national projects like the Dos Bocas refinery. This cooperation is a sign of the strong ties between Dutch companies and entities like SEMAR and local ports. There is awareness from both parties on the current challenges that the recent SEMAR restructuring might bring, such as SEMAR taking the initiative in dredging activities. The entity will not be able to provide and cover the total national demand in regard to technology and machinery. Therefore, there is a great deal of room for collaboration.

Perspective of Major Dutch Companies with Previous Roots in Mexico

Despite the significant administrative changes that have occurred under the current federal administration, Dutch companies with an established presence in Mexico remain positive regarding the many business opportunities to be found in the country's ports.

Jurgen Nieuwenhoven, Area Manager of Dutch dredging expert Van Oord, a company that has already found significant business and projects in the development of the Dos Bocas port and refinery, has made this clear: "As SEMAR continues to expand its presence over port leadership, we have seen it is interested in the acquisition of new equipment and technology for the ports' dredging needs. In this and other senses, there continues to be several opportunities for us to participate and to help these new port administrations. These military administrations need us to do certain work that is out of their reach, either because it is too specialized or because they cannot do it under the dictated time frames."

Nieuwenhoven has the following perspective of the challenges ahead: "Many projects have been canceled or delayed, particularly in the energy sector, to benefit PEMEX. However, there are also new ambitions that we find intriguing and which represent new opportunities for us to support the country. These are the development of new shipyards in the ports of Altamira and Progreso. These are not small projects. Developments such as offshore wind farms will eventually make it to Mexico, even if it takes a little longer. We are becoming increasingly less interested in oil projects; nevertheless, gas infrastructure still represents a significant part of our vision for the future. We also want to participate in more integrated projects in which we are responsible for more than just dredging. We could work on the development of an entire port, for example."

Luis Navarro, Mexico Country Manager of Heerema Marine Contractors, has experienced significant success working for Mexico's new private oil and gas operators through close collaborations with the country's ports. "We want to be part of as many new projects as possible in terms of offshore platform installations. We also want to extend our relationships with both PEMEX and private oil companies. Being a partner to PEMEX continues to be one of our ambitions." Navarro says companies working in Mexico "have to be ready for a very dynamic market, and as such, they have to be aware of their costs and the contingencies that could arise in their budgeting processes."

Horacio Delgado, Commercial Manager for the Americas at Damen, has a uniquely important perspective due to the company's long-standing relationship with SEMAR. "We consider the delivery of the Pola 101 vessel to SEMAR in 2020 to be one of our most important achievements in recent years, along with our entrance into Mexico's dredging vessel market, which we have accomplished through our relationship with SEMAR as well. This is a process through which we have delivered one Damen Cutter Suction Dredger, or CSD, 650 vessel called 'Laguna

Morelos,' also delivered in 2020, and five CSD 500 vessels delivered in 2021 along with one CSD 450 vessel." Damen has also delivered 10 150 models of its Submersible Dredge Pumps with Jet Water Pump and Power Pack auxiliary systems, along with two ASD 2312 Tug units for work in the ports of La Paz, BCS and Manzanillo through contractor Boluda Corporación Marítima, also known as Grupo Boluda. These deliveries were accomplished in the midst of the most stringent pandemic restrictions.

Delgado is very optimistic in regard to Mexico's role in the company's future: "Our ambition for the next three years is to continue the process of consolidation in Mexico's dredging market while continuing to strengthen our relationship with SEMAR. We want to continue working on local construction projects with SEMAR, in part because nobody is doing more construction in Mexico than them. Expanding our market in Mexico is a top priority. There are intercultural challenges to be faced in the growth and development of a business relationship between a Dutch company and a Mexican client. It has been necessary for us to adapt to some uniquely Mexican conventions when it comes to business and negotiation methods, but this is true of all countries that we work in, and we consider it a part of our business strategy to develop that capacity for intercultural exchange."

Guido van der Zwet, President iPS Powerful People, which coordinates employment for multinational personnel worldwide in the international maritime and dredging industry, says the company has accomplished important milestones in recent years. "We have been able to hire over 5,000 seafarers over the last five years, of which 99 percent are Mexican crew. In regard to the implementation of the Energy Reform that was approved in 2014 but started to increase the need for workforce from 2016 onwards, iPS has been able to establish itself as one of the key providers of personnel services in the energy sector. iPS has increased its personnel and currently has offices in Mexico City, Villahermosa and Ciudad del Carmen. "iPS Mexico's office was launched in 2007, although the company has been around for much longer. The company has come a long way since then, strengthening its experience, knowledge and expertise over the years and making iPS a company that is ready for the future," said van der Zwet.

Regarding plans and ambitions for the next three years, van der Zwet referenced the country's amended labor law. "With the recent change in the Mexican Labor Law, outsourcing as it was known in earlier years has been banned. There are still opportunities to hire Specialized Services, for activities that are not the core business of companies as written in the Articles of Incorporation and/or measured by invoicing volume. iPS has now been registered as an official Specialized Services company, offering services in maritime, dredging, construction and oil and gas." Today, iPS is looking forward to an increase in demand of personnel in the industrial sector over the coming years, said van der Zwet. In addition, "the company has also expanded its portfolio of services and is able to recruit and hire in the name of the client, and has a special division for white-collar recruitment services. iPS is ready for the coming years and feels that its 15 years in Mexico have been just the start."

Of course, there are challenges in Mexico, as well as a different working culture, nevertheless, van der Zwet has valuable recommendations. "In Mexico, things might take longer to take off, but once you are established here, you will find long-standing relationships to be very valuable. The most important points to learn and put into action in Mexico are People, Presence and Patience. Counting on People that have a clean reputation and great networks is key to make doing business in Mexico a success. It is important to be Present, make sure you take your time to build and maintain relationships, on both formal and informal occasions. Patience is a virtue, but especially in Mexico, where you need to seed with ideas, networking and relationships before you can actually harvest. You can learn more about the P's and my experiences in Mexico here: https://mexicobusiness.news/oilandgas/news/farewell-not-goodbye," said van der Zwet.

Establishing a close and proper relationship with SEMAR will guarantee on-time information for ideal business developments.

Despite recent hardships, such as the global pandemic and internal policy debates like the electricity reform, there are opportunities for international companies, especially Dutch enterprises with maritime and logistics expertise, in areas specialized in engineering, consultancy in logistics and energy management and human capital training, in addition to overall bilateral collaboration. It is important to work with local partners that will facilitate contact with public entities, prompting a smooth business transition and development.

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