

SPECIAL EDITION

# Transporte XXI

April 2026



# SPANISH PORTS



logistics made in Spain

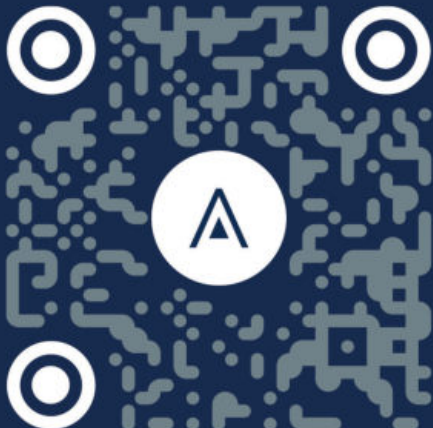


# SPAIN



## ACCESS WORLD OPERATES IN

AFRICA | ASIA PACIFIC | EUROPE & MIDDLE EAST | NORTH AMERICA | SOUTH AMERICA



## Access World (Spain), S.A.U.

 [Sales\\_SPAIN@accessworld.com](mailto:Sales_SPAIN@accessworld.com)

 +34 93 289 64 25

[www.accessworld.com](http://www.accessworld.com)



# Transporte XXI

Published by

**INDUSTRIA Y COMUNICACIÓN SA**

c. Jose María Olavarri, 6 - 2º - 9  
48001 Bilbao (Spain)

+34 944 400 000  
transporte@grupoxxi.com  
www.TransporteXXI.com

Founder

F. JAVIER MIRANDA RUIZ

Managing Director

JAVIER MIRANDA DESCALZO

Director

ALFONSO ALDAY

Deputy Director

ANTONIO MARTÍNEZ

Analysis and Editorial

CARLOS SÁNCHEZ,  
EVA MÁRMOL,  
IÑAKI EGUIA

Technical Director

JOSÉ ANGEL CALVO

Marketing Director

CLARA BOUZA

Graphics and Design

GEMA LAUZIRIKA,  
IBON UGARTEBURU

Research

DPTO. DE DOCUMENTACIÓN  
DE TRANSPORTE XXI

Production

GRUPO XXI  
DE COMUNICACIÓN EMPRESARIAL

Printed by

GRÁFICAS CASTUERA



La marca de la  
gestión forestal  
responsable

All Rights Reserved

REPRODUCTION IN WHOLE OR IN PART  
WITHOUT EXPRESS PERMISSION  
OF THE PUBLISHER IS PROHIBITED

## Contents

### FIRMS

GUSTAVO SANTANA HERNÁNDEZ - PUERTOS DEL ESTADO	03
SARA BLANCO - OCEAN CAPITAL PARTNERS	22
ÁLEX LÓPEZ - REVENANT INDUSTRIAL & PORTS MACHINERY	40

### SPANISH PORT SECTOR

CONNECTIVITY	04
MARITIME FRONTS	16

### TRAFFIC IN EU PORTS

GENERAL TRENDS	06
CONTAINERS	10

### TRAFFIC IN SPANISH PORTS

GENERAL TRENDS	14
HISTORIC EVOLUTION	18
LIQUID BULK	24
DRY BULK	26
GENERAL CARGO	28
CONTAINERS	30
PERISHABLE GOODS	42
SHIP SUPPLIES	50
BUNKERING	52
VEHICLES	62
SHORT SEA SHIPPING	66
RO-RO CARGO	68
CRUISES	72
PASSENGERS	74

### THE CONTAINER BUSINESS

SHIPPING ALLIANCES	38
--------------------	----

### FUTURE CHALLENGES

SMART PORTS	44
DOCK ELECTRIFICATION	46
ROBOTISATION	48
LIQUEFIED NATURAL GAS	54
NEW VECTORS	56
HYDROGEN	58
NEW FUELS	60

### PROJECT CARGO

SPANISH MARKET	76
GLOBAL OVERVIEW	78

### INTERMODAL

RAIL-PORT TRAFFIC	82
RAIL TERMINALS	84
RAIL MOTORWAYS	86
SHIPPING COMPANIES	87

### MARITIME-PORT INDUSTRY IN SPAIN

GENERAL OVERVIEW	88
SHIPBROKING COMPANIES	90
TERMINAL OPERATORS	92
SHIPPING COMPANIES	94
MOORING AND TUGBOATS	96

### SPANISH FOREIGN TRADE

INTERNATIONAL MARITIME TRANSPORT	98
INTERNATIONAL MARITIME TRANSPORT BY REGIONS	100
IMPORT-EXPORT	102

# Sponsors


OPINION | OPPORTUNITY AND RESPONSIBILITY

# PORTS, A STRATEGIC PILLAR

GUSTAVO  
SANTANA HERNÁNDEZ

President of  
Puertos del Estado



In 2025, Spain's state-owned port system, coordinated by Puertos del Estado and reporting to the Ministry of Transport and Sustainable Mobility, experienced a key strategic moment: not only by consolidating its role in global logistics and as a driver of the national economy, but also by rolling out an ambitious investment roadmap for a future shaped by sustainability, connectivity and efficiency.

Last year, state-owned ports handled more than 556 million tonnes of freight, a figure slightly below that of 2024, as a result of global geostrategic and economic uncertainty. Beyond the headline figures, these results reflect a fundamental truth: the port system is not merely transit infrastructure, but a strategic pillar for Spain's trade, economy and tourism as well.

Over the past year, Puertos del Estado has reinforced its message of transformation: ports are not merely points of loading or transit, but key logistics nodes for the digital and green transition.

The energy transition has ceased to be an aspirational discourse and has become a concrete agenda. The deployment of infrastructure for the shore-side power supply of vessels in port (OPS), the push for alternative fuels and the commitment to offshore wind have all moved to the centre of port planning.

No less significant has been the progress in digitalisation. State-owned ports have continued to develop single-window platforms, intelligent traffic management systems and data analysis tools that improve operational efficiency and transparency. Digitalisation has been confirmed as an essential lever to enhance competitiveness, reduce costs and offer better services to system users. This vision of the future of our ports is not confined to rhetoric: it is being translated into concrete investments, with an ambitious horizon. The most significant

announcement of 2025 was made by Minister of Transport Oscar Puente, who confirmed an investment plan of more than €7 billion for state-owned ports between 2025 and 2029.

This investment framework —“Horizon 2030”— aims to strengthen port infrastructure, environmental sustainability, rail and road access, security and digitalisation, in order to turn ports not only into logistics hubs, but also into levers for strategic growth and territorial cohesion: ports that are better connected, greener and more competitive. Without overlooking the necessary drive to integrate ports with cities, in line with the objective of triple sustainability —economic, social and environmental— established in our Strategic Framework. Behind this investment plan also lies the objective of promoting more resilient ports, better prepared to meet their international obligations in terms of commitment to climate change.

Spanish ports compete in a complex international context: maritime instability, shifts in global routes, competition from neighbouring ports not subject to European regulations... This volatility requires the state-owned system to strengthen itself not only through investment in infrastructure, but also through operational flexibility and service quality.

In order to achieve the transformation we have designed, coordination between public administrations and with the private sector is essential. Maintaining solid and coordinated governance between Puertos del Estado and the port authorities will be crucial in managing major investment projects.

As became clear at the 1st National Congress of the Port Sector, which we held in March in Valencia, many of us are united by ports, and only by creating spaces for shared reflection and exploring joint avenues for action will we be able to anticipate change and

reinforce the role of the port system as a strategic pillar of the Spanish economy, a driver of foreign trade and an essential platform for territorial cohesion and service to society.

2025 was a year of strategic affirmation for Puertos del Estado and the Spanish port system. With a solid base of results, an ambitious investment plan for the coming years, and a clear narrative of logistics and environmental transformation, the national port sector is not only preparing to respond to current challenges, but also to lead the future.

2026 must be the year of acceleration. State-owned ports now face both the opportunity and the responsibility to lead a transformation that affects not only the maritime sector, but the Spanish economy as a whole. Seizing it will depend on the capacity for anticipation, cooperation and strategic vision that we are able to deploy starting today.

**THE NATIONAL  
PORT SECTOR IS  
NOT ONLY  
PREPARING TO  
RESPOND TO  
CURRENT  
CHALLENGES,  
BUT ALSO  
TO LEAD THE  
FUTURE**

SPANISH PORT SECTOR | CONNECTIVITY

# AN ESSENTIAL AXIS BETWEEN CONTINENTS

SPAIN MAINTAINS ITS POSITION AS A STRATEGIC HUB IN INTERNATIONAL MARITIME CONNECTIVITY, FURTHER CONSOLIDATING ITS ROLE AS A BENCHMARK FOR EUROPEAN PORTS

The Spanish port system continues to strengthen its position as one of the leading benchmarks in international maritime connectivity. According to the latest Liner Shipping Connectivity Index (LSCI) compiled by Unctad, Spain ranks eighth worldwide. It is thus consolidating its position as one of the countries with the greatest access to global liner shipping networks and as a key player within the EU.

The United Nations barometer, which measures each country's degree of connection to international shipping routes, assigns Spain an index score of 419.32 points, in a ranking led by China, followed by South Korea and Singapore. The United States ranks fifth, while Spain remains one of Europe's leading logistics powers.

The evolution of the port system confirms a sustained trend since 2006, a period during which maritime connectivity has recorded structural growth, reflecting the interest of the major shipping lines in maintaining and expanding calls at Spanish ports. This position reinforces the role of the network as a key competitive asset for foreign trade and for the industrial and services sectors as a whole.

Within the port sphere, Valencia, the Bay of Algeciras and Barcelona remain

**3**  
SPANISH PORTS RANK AMONG THOSE WITH THE HIGHEST CONNECTIVITY

among the Spanish enclaves with the strongest presence in the connectivity ranking. Valencia ranks 26th, while Algeciras stands in 33rd place and Barcelona in 34th, in a context marked by the reorganisation of services resulting from shipping alliances and by traffic diversions caused by the Red Sea crisis.

Having a high degree of maritime connectivity continues to be a distinctive logistics advantage, as it facilitates direct access to the main international markets and reinforces the role of Spanish ports as gateways for global trade flows.

### Changes

Logistics and port operators are still awaiting how transit flows through the Suez Canal may evolve in 2026, a decisive factor in the future configuration of global shipping routes. The normalisation of navigation through the Red Sea and the possible return of services to Suez will shape the next major adjustment of the international logistics map. In this context, the return to Suez is emerging as a strategic opportunity for Spanish ports. Shorter routes between Asia and Europe reinforce the role of enclaves such as Valencia, Barcelona and the Bay of Algeciras, which are natural entry points for intercontinental traffic into southern Europe and North Africa.

## SPAIN, EUROPE'S CONNECTIVITY LEADER

The consolidation of regular shipping lines in Valencia, Algeciras, Barcelona and Las Palmas keeps the Spanish port system as a benchmark among European ports.

### TOP COUNTRIES

COUNTRY	2025	%25/24	%25/22	2024	2023	2022
1 China	1,317	+5%	+76%	1,258	1,191	1,176
2 South Korea	631	-1%	+44%	641	639	597
3 Singapur	627	+8%	+15%	583	600	582
4 Malasia	524	+5%	+29%	499	504	484
5 U.S.A.	514	0%	+1%	515	504	523
6 Vietnam	468	+12%	+227%	416	415	398
7 Japan	427	+3%	-19%	413	415	404
<b>8 Spain</b>	<b>419</b>	<b>-2%</b>	<b>+5%</b>	<b>426</b>	<b>413</b>	<b>394</b>
9 India	398	+10%	+88%	360	339	307
10 United Kingdom	393	+3%	-23%	380	375	386

### TOP PORTS

PORT	COUNTRY	2024	%24/23	%24/06	2023	2006
1 Shanghai	China	2,416	+2%	+85%	2,360	2,173
2 Ningbo	China	2,057	0%	+161%	2,050	1,858
3 Singapur	Singapur	1,877	+9%	+18%	1,721	1,769
4 Busan	South Korea	1,648	-4%	+35%	1,715	1,741
5 Qingdao	China	1,426	+5%	+130%	1,358	1,252
6 Shekou	China	1,195	+3%	+238%	1,156	1,083
7 Port Klang	Malasia	1,133	+5%	+33%	1,077	1,094
8 Nansha	China	1,063	+9%	+726%	978	938
9 Hong Kong	China	976	-10%	-40%	1,084	1,116
10 Rotterdam	Netherlands	950	+1%	-17%	939	1,007
11 Xiamen	China	916	-1%	+81%	926	912
12 Antwerp	Belgium	898	-3%	-15%	925	925
13 Kaohsing	Taiwan	859	-3%	+7%	884	876
14 Yantian	China	811	-3%	+40%	838	780
15 Xingang	China	800	+8%	+81%	744	712
16 Jebel Ali	U.A.E.	791	+1%	+55%	781	757
17 Colombo	Sri Lanka	737	+6%	+60%	697	635
18 Yokohama	Japan	728	+2%	-13%	711	715
19 Laem Chabang	Thailand	727	+4%	+61%	701	690
20 Hamburg	Germany	698	+5%	-32%	664	667
21 Nhava Sheva	India	657	+9%	+89%	603	564
22 Mundra	India	639	+1%	+279%	630	571
23 Haiphong	Vietnam	632	+11%	+255%	568	576
24 Ho Chi Minh	Vietnam	616	+6%	+90%	582	568
25 Dalian	China	607	+7%	+53%	568	541
<b>26 Valencia</b>	<b>Spain</b>	<b>593</b>	<b>0%</b>	<b>+28%</b>	<b>591</b>	<b>598</b>
27 Tokio	Japan	585	+2%	-9%	575	584
28 Tajunj Pelepas	Malasia	576	+2%	+55%	563	554
29 Tanger Med	Morocco	571	+5%	-	544	561
30 Kobe	Japan	556	-1%	-26%	562	567
31 Gwangyang	South Korea	529	+1%	+49%	526	541
32 Nagoya	Japan	522	-1%	-24%	525	523
<b>33 Algeciras</b>	<b>Spain</b>	<b>512</b>	<b>-7%</b>	<b>+63%</b>	<b>552</b>	<b>526</b>
<b>34 Barcelona</b>	<b>Spain</b>	<b>483</b>	<b>-2%</b>	<b>-2%</b>	<b>493</b>	<b>496</b>
35 Manila	Philippines	467	0%	+43%	465	475

Index that assesses accessibility by regular maritime transport lines. Index (Promedio Q1 2023 = 100)  
Source: UNCTAD.

# Taking part in change

## An evolving SMART hub

● Transparent

● Sustainable

Efficient ●

● Connected



Port de Barcelona

[www.portdebarcelona.cat](http://www.portdebarcelona.cat)



MAERSK

TRAFFIC IN EU PORTS | GENERAL TRENDS

# EUROPE LOSES CARGO

VOLATILITY IN MARITIME TRADE IS HITTING PORT TRAFFIC

## REBALANCING OF FLOWS

Las Palmas, strategically positioned on the new maritime route via the Cape of Good Hope, was the fastest-growing port in 2025 within the top 30. Italy's Gioia Tauro ranked first in comparison with 2019, together with Poland's Gdansk.

### THE FASTEST-GROWING 2025 / 2024

RK	PORT	2025	%25/24	2024
1	Las Palmas	36.9	+16%	31.8
2	Klaipeda	39.0	+10%	35.5
3	Szczecin	34.8	+8%	32.3
4	Bremen/Bremerhaven	65.3	+5%	61.9
5	Marseille	74.0	+5%	70.5
6	Dunkerque	48.0	+4%	46.0
7	Cagliari(*)	31.3	+4%	30.1
8	Rostock	31.3	+4%	30.1
9	Gdansk	80.4	+4%	77.4

### THE FASTEST-GROWING 2025 / 2019

RK	PORT	2025	%25/19	2019
1	Gioia Tauro(*)	45.2	+55%	29.1
2	Gdansk	80.4	+54%	52.2
3	Las Palmas	36.9	+38%	26.7
4	Rostock	31.3	+22%	25.7
5	Szczecin	34.8	+8%	32.3
6	Barcelona	69.4	+2%	67.9
7	Constanza	67.6	+1%	66.6
8	Sines	42.1	+1%	41.8
9	Cartagena	34.4	+0%	34.3

Note (\*): Estimates based on first-half traffic. Data in millions of tonnes (provisional). Source: Puertos del Estado and port authorities. Prepared by Transporte XXI.

Waters remain choppy across the European port system, which closed 2025 with clear signs of deceleration. The report prepared by Transporte XXI based on traffic statistics from the 30 leading ports — some of them still without full-year data at the close of this edition — reflects a year marked by weak growth, setbacks at some of the major hubs, and selective gains at strategic ports in the Mediterranean and the Baltic.

After several years of major logistics disruptions, first due to the pandemic and then to geopolitical tensions, international maritime trade is still navigating in a highly volatile environment, shaped by regional conflicts and the reorganisation of shipping routes. Added to this uncertainty are the slowdown in European industrial activity, the reconfiguration of maritime routes resulting from disruptions in global supply chains, and the gradual inclusion of maritime transport in the European Emissions Trading System (ETS).

The EU's top 30 ports continue to be clearly led by Rotterdam, which retains its position as the continent's main

maritime gateway with 428.4 million tonnes of total traffic. At a considerable distance comes Antwerp-Bruges, with 266.5 million tonnes, while Hamburg ranks third with 114.6 million tonnes.

The performance of these three northern European giants reflects well the overall tone of the year. According to figures published by the port authorities themselves, Rotterdam recorded a 1.7 per cent decline in total traffic in 2025, mainly affected by a drop in some energy bulk segments and by weaker industrial demand in Europe. Antwerp-Bruges, the continent's second major logistics hub, also

closed the year with a decline of close to 4 per cent, while Hamburg managed to recover some activity, with a 2.5 per cent increase after several years of adjustments in its traffic.

### Mediterranean flavour

In southern Europe, the main Mediterranean ports continue to hold prominent positions within the EU port system, although without posting significant growth.

The port of Algeciras, one of the Mediterranean's major lo-



gistics nodes, once again exceeded 100 million tonnes in 2025 (including domestic traffic, bunkering and fishing), although with a decline of close to 3 per cent compared with the previous year. These figures allow the leader of the Spanish port system to maintain fourth place in the EU port ranking, behind only the continent's three giants.

Behind it come Valencia, with just over 80 million tonnes, and Barcelona, which approached 70 million tonnes, both with virtually stable per-

2.2

BILLION TONNES WERE HANDLED BY THE EU'S TOP 30 PORTS



**GRUPO IBAIZABAL**

INTEGRATED MARITIME SERVICE

- Coastal and transatlantic towage
- Salvage
- Port assistance
- Maritime and offshore terminal management
- Counter-pollution
- Fuel Supply to Ships
- Transportation of petroleum products
- Ship management



PORT SERVICES

TOWING MOORING

OFFSHORE

SHIPPING

TANKERS BUNKERS

SHIPYARD

[www.grupoibaizabal.com](http://www.grupoibaizabal.com)

Muelle Tomás Olabarri, 4 – 5  
Getxo (Vizcaya) Spain  
Tel: +34 944 645 133  
Fax: +34 994 805 207  
Email: [ibaizabal@ibaizabal.org](mailto:ibaizabal@ibaizabal.org)



Algeciras, Spain's leading port, retains fourth place in Europe.

performances in the past year.

The Mediterranean retains a structural advantage within global shipping routes, being located on the axis that connects Asia with Europe through the Suez Canal. However, the Red Sea crisis continued to disrupt part of these flows during 2025, forcing many shipping lines to divert services via the Cape of Good Hope and reorganise their rotations.

In this context, the growth of Mediterranean ports depends increasingly on competition among the major transshipment hubs and on the adjustments shipping alliances make to their maritime networks.

Against this backdrop, Marseille was one of the Mediterranean ports that performed best in 2025, with growth of close to 5 per cent. The French port retains a prominent position in the continent's energy traffic, especially in oil and refined products, while also reinforcing its logistics role for southern France and the Rhône corridor. This weight of energy

(continued on page 08)

# Innovation and Training

in Ports, Transport and Logistics



FUNDACIÓN  
VALENCIAPORT

Project Promotion and Funding

iMARPORT

Open Innovation

opentop Valenciaport Innovation HUB

Valenciaport Knowledge Hub

Pharos39.0



Safety and security



Digital Transformation



Blue Economy



Port Logistics



Specialised Training



Energy Transition and Sustainability



Market Intelligence

FUNDACIÓN  
VALENCIAPORT



[www.fundacion.valenciaport.com](http://www.fundacion.valenciaport.com)

(from page 07)

bulk explains to a large extent its performance within the European ranking by total traffic.

**The Baltic gains prominence**

Further north, the Baltic continues to gain weight on the European port map. The Polish port of Gdansk has already consolidated its place among the ten largest ports in the European Union, with more than 80 million tonnes of traffic after recording growth of close to 4 per cent during the past year.

This enclave has become one of the continent's major emerging logistics poles, benefiting both from economic growth in Central and Eastern Europe and from the reconfiguration of supply chains resulting from the war in Ukraine.

The development of new port infrastructure, improved rail connectivity with the industrial hinterland and the repositioning of some maritime routes in the Baltic have reinforced Gdansk's role as a logistics alternative to the major northern European ports.

In Germany, alongside Hamburg and Bremen/Bremerhaven, another port is beginning to gain prominence within the country's logistics system. It is Wilhelmshaven, the North Sea enclave that hosts the JadeWeserPort deep-water terminal, capable of receiving the world's largest container ships without draught restrictions.

The port already handles around 35 million tonnes of total traffic per year, driven by growth in energy products — especially after the commissioning of infrastructure linked to liquefied natural gas — and by the gradual development of its container terminal, which continues to expand its activity within European maritime networks. In 2025, it handled 1.5 million TEU.

**The 'Ukraine effect'**

One of the most significant shifts within the European ranking can be seen at the Romanian port of Constanza, which recorded a decline of close to 13 per cent in total traffic in 2025.

The downturn is explained to a large extent by the normalisation of grain traffic from Ukraine. During the first years of the war, Constanza became one of the main outlets for Ukrainian agricultural exports, which sharply boosted its port activity. As some alternative routes have gradually recovered, part of that extraordinary traffic has disappeared.

Overall, the analysis of the European Union's top 30 shows that the major northern hubs continue to dominate total volumes thanks to their enormous logistics capacity, their rail and inland waterway connectivity, and their proximity to the continent's main industrial centres.

However, the growth of Mediterranean and Baltic enclaves reveals a gradual diversification of the European port map. Factors such as the reorganisation of maritime routes, geopolitical

tensions, the energy transition and new environmental regulations are all helping to redefine the continent's logistics balance.



**SIGNS OF DECELERATION**

Traffic at the EU's top 30 ports by total freight volume fell again in 2025, marking a second consecutive year of decline. The drop compared with pre-pandemic levels stands at 5%.

RK	PORT	COUNTRY	2025	%25/24	%25/19	2024	2023	2022
1	Rotterdam	Netherlands	428.4	-2%	-9%	435.8	438.8	467.4
2	Antwerp + Zeebrugge	Belgium	266.5	-4%	-6%	277.7	271.3	287.1
3	Hamburg	Germany	114.6	+3%	-16%	111.8	114.3	119.9
<b>4</b>	<b>Algeciras</b>	<b>Spain</b>	<b>100.7</b>	<b>-3%</b>	<b>-8%</b>	<b>104.1</b>	<b>104.8</b>	<b>107.3</b>
5	Haropa	France	84.7	+2%	-6%	83.2	81.3	85.1
<b>6</b>	<b>Valencia</b>	<b>Spain</b>	<b>80.7</b>	<b>-1%</b>	<b>-1%</b>	<b>81.3</b>	<b>77.2</b>	<b>79.4</b>
7	Gdansk	Poland	80.4	+4%	+54%	77.4	81.0	68.2
8	Marseille	France	74.0	+5%	-6%	70.5	72.0	77.0
<b>9</b>	<b>Barcelona</b>	<b>Spain</b>	<b>69.4</b>	<b>-0%</b>	<b>+2%</b>	<b>69.7</b>	<b>64.0</b>	<b>70.9</b>
10	Constanza	Romania	67.6	-13%	+1%	77.5	92.5	75.6
11	North Sea Port	Belgium	67.0	+1%	-6%	66.3	65.9	73.6
12	Bremen/Bremerhaven	Germany	65.3	+5%	-6%	61.9	58.5	64.0
13	Amsterdam	Netherlands	n.a.	-	-	62.6	63.0	78.6
14	Trieste	Italy	60.0	+1%	-3%	59.5	55.6	57.6
15	Duisburg	Germany	n.a.	-	-	50.8	50.8	54.9
16	Dunkirk	France	48.0	+4%	-9%	46.0	44.0	49.0
17	Genoa	Italy	45.7	-2%	-13%	46.7	47.8	49.9
18	Gioia Tauro(*)	Italy	45.2	+1%	+55%	44.8	41.4	42.2
19	Sines	Portugal	42.1	-12%	+1%	47.8	43.0	44.8
20	Gothemburg	Sweden	n.a.	-	-	39.8	35.6	41.2
21	Klaipeda	Lithuania	39.0	+10%	-16%	35.5	32.7	36.1
<b>22</b>	<b>Las Palmas</b>	<b>Spain</b>	<b>36.9</b>	<b>+16%</b>	<b>+38%</b>	<b>31.8</b>	<b>27.9</b>	<b>28.3</b>
23	Dublin	Ireland	36.0	+2%	-5%	35.2	35.6	36.7
24	Szczecin	Poland	34.8	+8%	+8%	32.3	35.3	36.8
25	Wilhemshaven	Germany	n.a.	-	-	34.5	29.8	-
<b>26</b>	<b>Cartagena</b>	<b>Spain</b>	<b>34.4</b>	<b>-4%</b>	<b>+0%</b>	<b>35.9</b>	<b>37.8</b>	<b>36.6</b>
<b>27</b>	<b>Bilbao</b>	<b>Spain</b>	<b>32.1</b>	<b>-7%</b>	<b>-10%</b>	<b>34.6</b>	<b>32.9</b>	<b>32.9</b>
28	Cagliari(*)	Italy	31.3	+4%	-10%	30.1	29.0	30.8
29	Rostock	France	31.3	+4%	+22%	30.1	30.9	29.0
<b>30</b>	<b>Huelva</b>	<b>Spain</b>	<b>30.3</b>	<b>-3%</b>	<b>-10%</b>	<b>31.1</b>	<b>30.1</b>	<b>32.1</b>
<b>TOTAL 30</b>			<b>2,234.1</b>	<b>-1%</b>	<b>-5%</b>	<b>2,246.4</b>	<b>2,224.7</b>	<b>2,292.9</b>

Note (\*): Estimates based on first-half traffic. Data in millions of tonnes (provisional). Source: Puertos del Estado and port authorities. Prepared by Transporte XXI.

**SEVEN SPANISH PORTS IN THE 'TOP 30'**

Spain maintains a prominent presence within the European port system. As many as seven enclaves feature among the 30 largest ports in the European Union by total freight traffic, reflecting the country's strategic weight in the continent's shipping routes.

The largest volume corresponds to the port of Algeciras, which exceeds 100 million tonnes. Its position on the Strait of Gibraltar makes it a key point for the transshipment of cargo between the major intercontinental routes. It is followed by Valencia and Barcelona, two of the main commercial ports in the European Mediterranean, with traffic exceeding 80 mil-

lion and 69 million tonnes respectively, supported both by container movements and by the dynamism of Spanish foreign trade.

Alongside these major hubs, four other Spanish ports complete the national presence in the ranking. Las Palmas, a strategic enclave for traffic between Europe, Africa and the Americas; Cartagena, one of the Mediterranean's main energy ports; Bilbao, the great industrial gateway of the Bay of Biscay and an important energy port, where more than half of traffic corresponds to liquid bulk, largely linked to Petronor's activity; and Huelva, with a strong weighting of petrochemical and energy traffic.

## Commitment

To make maritime transport an efficient and more sustainable alternative



TRAFFIC IN EU PORTS | CONTAINERS

# SHIPPING ROUTES ARE BEING READJUSTED

NORTHERN EUROPE'S GIANTS MAINTAIN THEIR LEADERSHIP, BUT THE MEDITERRANEAN IS GAINING WEIGHT AND NEW LOGISTICS POLES ARE EMERGING IN THE BALTIC AND NORTHERN GERMANY

## ABOVE PRE-PANDEMIC LEVELS

The 30 leading container ports recorded growth of close to 4% last year compared with 2024, an identical increase to that recorded against 2019, before the health crisis.

RK	PORT	COUNTRY	2025	%25/24	%25/19	2024	2023	2022
1	Rotterdam	Netherlands	14,245	+3%	-4%	13,820	13,447	14,455
2	Antwerp + Zeebrugge	Belgium	13,630	+1%	+1%	13,500	12,528	13,500
3	Hamburg	Germany	8,300	+6%	-10%	7,800	7,755	8,300
4	<b>Valencia</b>	<b>Spain</b>	<b>5,663</b>	<b>+3%</b>	<b>+4%</b>	<b>5,476</b>	<b>4,797</b>	<b>5,052</b>
5	Bremen/Bremerhaven	Germany	4,900	+10%	+1%	4,445	4,200	4,600
6	<b>Algeciras</b>	<b>Spain</b>	<b>4,738</b>	<b>+1%</b>	<b>-8%</b>	<b>4,713</b>	<b>4,734</b>	<b>4,767</b>
7	Giogia Tauro	Italy	4,491	+14%	+78%	3,940	3,549	3,380
8	Piraeus	Greece	3,970	-6%	-30%	4,220	4,580	4,352
9	Duisburg	Germany	n.a.	-	-	3,900	3,600	4,000
10	<b>Barcelona</b>	<b>Spain</b>	<b>3,727</b>	<b>-4%</b>	<b>+12%</b>	<b>3,886</b>	<b>3,280</b>	<b>3,525</b>
11	Haropa	France	3,200	+3%	+13%	3,100	2,630	3,100
12	Marsaxlokk	Malta	2,870	+0%	+6%	2,860	2,800	2,900
13	Gdansk	Poland	2,800	+25%	+35%	2,249	2,050	2,072
14	Genoa	Italy	2,400	-2%	-8%	2,461	2,394	2,533
15	Sines	Portugal	1,719	-10%	+21%	1,910	1,665	1,663
16	<b>Las Palmas</b>	<b>Spain</b>	<b>1,543</b>	<b>+16%</b>	<b>+53%</b>	<b>1,330</b>	<b>1,205</b>	<b>1,164</b>
17	Wilhelmshaven	Germany	1,500	+78%	+135%	843	532	683
18	Marseille	France	1,450	+0%	-0%	1,450	1,331	1,530
19	Klaipeda	Lithuania	1,309	+22%	+86%	1,069	1,050	1,052
20	Koper	Slovenia	1,272	+12%	+33%	1,133	1,066	1,018
21	La Spezia	Italy	1,217	-2%	-14%	1,238	1,139	1,262
22	Gdynia	Poland	1,040	+10%	+16%	947	874	914
23	Dublin	Ireland	957	+8%	+24%	885	796	823
24	Gothenburg	Sweden	934	+3%	+21%	909	914	885
25	Aarhus	Denmark	844	+28%	+47%	660	674	757
26	Constanza	Romania	831	-16%	+25%	990	885	772
27	Dunkerque	France	747	+14%	+65%	653	670	745
28	Leixoes	Portugal	n.a.	-	-	715	702	713
29	Livorno(*)	Italy	712	+7%	-10%	664	669	752
30	Trieste	Italy	682	-19%	-14%	842	852	888
<b>TOTAL 30</b>			<b>96,305</b>	<b>+4%</b>	<b>+4%</b>	<b>92,607</b>	<b>87,367</b>	<b>92,158</b>

Note (\*): Estimates based on first-half traffic. Data in thousands of TEU (provisional). Source: Puertos del Estado and Port Authorities. Prepared by Transporte XXI.

The container business in the European Union continues to be dominated by the major northern hubs, but the port logistics map is beginning to show signs of change.

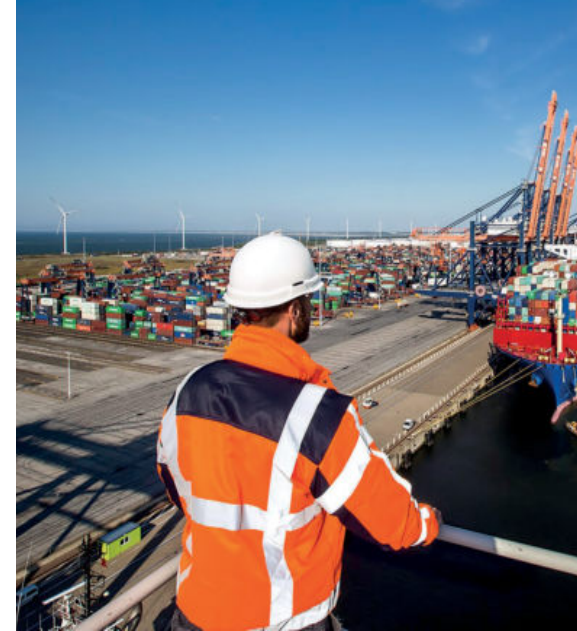
The analysis of the 30 leading container ports, which recorded container traffic growth of close to 4 per cent during the past year, reflects a dual reality: while the historic northern European axis retains control of the largest volumes, Mediterranean ports are consolidating their role in global maritime chains, and Baltic enclaves are gaining prominence as a result of geopolitical changes in international trade.

The top 30, compiled by Transporte XXI, is headed by Rotterdam. The Dutch port, the world's eleventh-largest, exceeded 14.2 million TEU in 2025 (+3 per cent). It is followed by Antwerp-Bruges, with 13.6 million TEU (+1 per cent), and then Hamburg, which reached 8.3 million TEU (+6 per cent). This logistics triangle remains the main engine of European container traffic, supported by its strategic position as the gateway to the industrial markets of Germany, the Benelux countries and Central Europe.

Northern Europe's logistics structure continues to be supported by a powerful intermodal network —especially rail and inland waterways— linking ports with the continent's industrial hinterland. Even so, an internal redistribution of traffic is also beginning to emerge, particularly in Germany.

One of the most striking cases is the growth of the German port of Wilhelmshaven, which recorded a 77 per cent increase in container traffic, reaching 1.5 million TEU. Although its volume still remains far below that of Europe's major ports, this North Sea enclave is gaining weight as a logistics alternative within the German port system.

The development of deep-water terminals, con-



Operations at Maasvlakte quay in the port of Rotterdam.

gestion at other ports and the reorganisation of shipping alliances have all favoured this growth, in a context in which Germany is seeking to strengthen its port capacity in order to serve the supply chains of its powerful industrial sector.

The ports of Bremen /Bremerhaven also showed dynamic performance, with growth of more than 10 per cent, consolidating their role as one of the country's main logistics nodes and entering the top 5.

### The south exists too

While the north maintains its hegemony in absolute volume terms, the Mediterranean continues to gain prominence in European maritime trade.

The leading southern port remains Valencia, with 5.6 million TEU, followed by Algeciras, with 4.7 million TEU, two platforms located on the strategic axis between Asia, the Mediterranean and the Atlantic. Both enclaves posted moderate growth, although

**GEOPOLITICAL TENSIONS ARE REDEFINING THE PORT MAP**



ERIC BAKKER (A.P. DE ROTTERDAM)

Mediterranean dynamism is facing a more complex competitive environment, marked by the reorganisation of shipping routes and the growing competition from emerging hubs.

Also standing out in this area are Barcelona, Genoa, La Spezia and Marseille, which continue to hold relevant positions within the European port system, albeit with uneven performances during the latest financial year.

In any case, the Mediterranean retains a key structural advantage: its geographical position on the shipping routes between Asia and Europe, especially in the context of tensions in the Red Sea and changes in global supply chains.

**The rise of the Baltic**

Another of the most significant developments revealed by the analysis of

the EU's top 30 container ports is the growth of several Baltic enclaves, particularly in Poland and Lithuania.

The Polish port of Gdansk continues to consolidate its position as one of northern Europe's emerging hubs, driven by the economic growth of Central and Eastern Europe and by the logistics repositioning resulting from the war in Ukraine. Within the same dynamic is Klaipeda, in Lithuania, which is gaining prominence as a logistics node for Baltic trade and as a gateway to the region's markets.

Overall, the ranking reveals how the reorganisation of shipping alliances, the geopolitics of international trade, tensions on global maritime routes and growing competition among ports are redefining the port map.

**PORT REPOSITIONING**

The German port of Wilhelmshaven was the fastest-growing last year, up 78% to reach 1.5 million TEU, and was also the port that advanced the most compared with 2019, by 135%.

**THE FASTEST-GROWING 2025 / 2024**

RK	PORT	2025	%25/24	2024
1	Wilhelmshaven	1,500	+78%	843
2	Aarhus	844	+28%	660
3	Gdansk	2,800	+25%	2,249
4	Klaipeda	1,309	+22%	1,069
5	Las Palmas	1,543	+16%	1,330

**THE FASTEST-GROWING 2025 / 2019**

RK	PORT	2025	%25/19	2019
1	Wilhelmshaven	1,500	+135%	639
2	Klaipeda	1,309	+86%	703
3	Giogia Tauro	4,491	+78%	2,523
4	Dunkirk	747	+65%	454
5	Las Palmas	1,543	+53%	1,007

Note (\*): Estimates based on first-half traffic. Data in thousands of TEU (provisional). Source: Puertos del Estado and Port Authorities. Prepared by Transporte XXI.

**GROWTH AND SUSTAINABILITY**

**Port Authority**  
SANTA CRUZ DE TENERIFE

**2030**  
A SUSTAINABLE PORT



TTI ALGECIRAS

TTI Algeciras has begun implementing a Truck Appointment System at its terminal in the port of Algeciras, reinforcing its commitment to digitalisation.

TRAFFIC IN EU PORTS | CONTAINERS

# SPAIN SETS A NEW CONTAINER RECORD

THE PORTS OF VALENCIA AND ALGECIRAS RANK FOURTH AND SIXTH IN THE EU, WITH BARCELONA IN THE TOP 10 AND LAS PALMAS IN SIXTEENTH PLACE

With the effect of the Red Sea crisis now fading, after it caused a temporary increase in flows at some Spanish ports, container traffic is maintaining its positive momentum in Spain.

The national port system closed last year with throughput of 18.6 million TEU, 2.7 per cent more than a year earlier, setting a new all-time high.

These figures allow Spain to flex its muscles in the demanding container business. As many as four ports remain in the EU's top 20: Valencia, Algeciras, Barcelona and Las Palmas. And the leading Spanish port in the ranking is in the select club of the top four,

**VALENCIA, THE MEDITERRANEAN'S LEADING EUROPEAN PORT**

behind only the three giants of northern Europe: Rotterdam, Antwerp-Bruges and Hamburg. Algeciras, for its part, ranks sixth after being overtaken by Bremen/Bremerhaven. This is reflected in the report compiled every year by Transporte XXI on the basis of the statistics made public by the port authorities, some of which had not released official data by the close of this edition.

## Valencia, fourth in the EU

The first Spanish port on the list is Valencia, which remains in fourth place.

The Port Authority, chaired by Mar Chao, closed 2025 with traffic of 5.66 million TEU, repre-

senting an increase of 3.4 per cent compared with 2024 and a new all-time record. "These figures are clear evidence of container shipping lines' commitment to the port of Valencia, although we must remain cautious given the complicated international context," Mar Chao said. Within this traffic, full import containers stood out, with the figure surpassing one million TEU for the first time. As much as 50.73 per cent of these imports came from China, an increase of 19.6 per cent over the previous year. Exports, for their part, grew by almost 5.6 per cent to reach 919,570 TEU, with the United States as the main destination for the goods, despite the strength of the euro and tariff policy.

The next Spanish port in the ranking is Algeciras, in sixth position. The two container terminals at the Andalusian port, operated by APM Terminals Algeciras and TTI Algeciras, handled 4.74 million TEU (+0.5 per cent). Of the total, the increase in import-export containers stood out against a slight decline in transhipment.

The chairman of the port authority, Gerardo Landaluce, stressed that the evolution of activity no longer depends only on supply and demand, but also on geopolitical, economic and regulatory factors that directly affect the Western Mediterranean and, very particularly, the Strait. In this scenario, the expansion of the TTI Algeciras terminal is emerging as one of the key developments for the immediate future.

The port authority has already approved the substantial modification of the terminal operator's concession, which will expand its surface area by 15.9 hectares. TTI Algeciras plans to invest more

than €135 million to increase its handling capacity by half a million TEU, reaching 2.1 million TEU by 2028.

Most of the outlay will be allocated to superstructure and automation processes.

Within the Spanish port system, the port of Barcelona also stands out, closing the top 10. The port authority, chaired by José Alberto Carbonell, handled

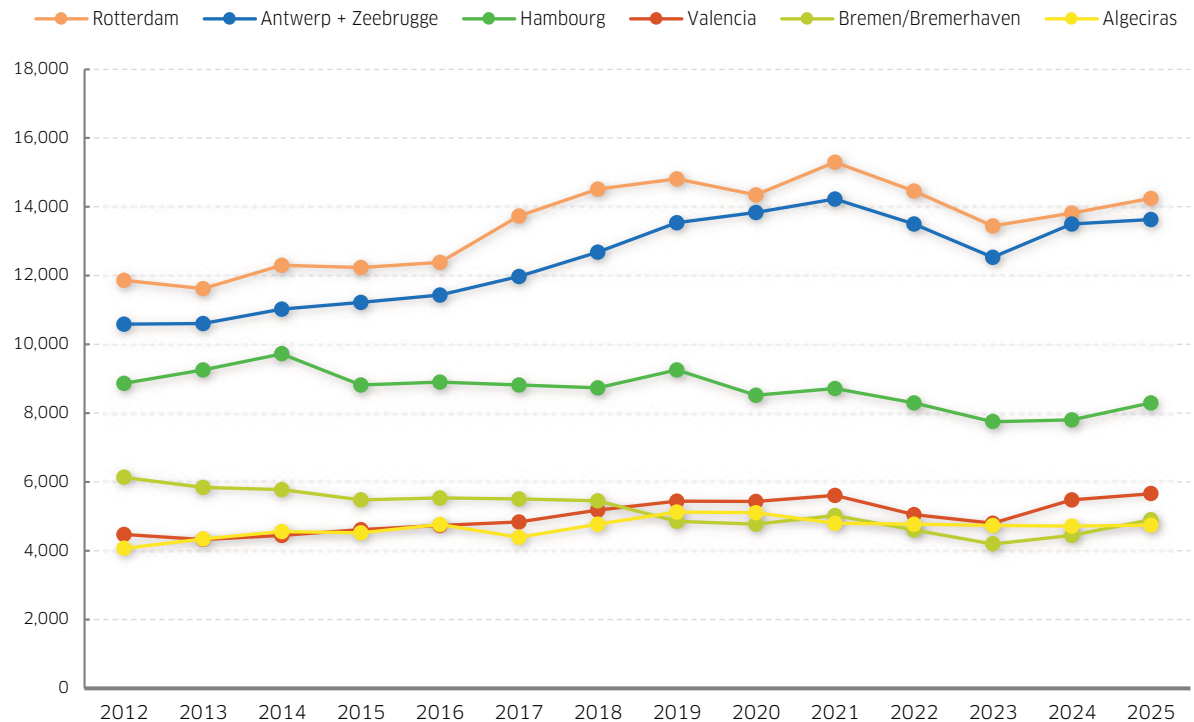
**18.6**  
MILLION TEU  
HANDLED BY  
SPANISH PORTS

3.7 million TEU. Although this was 4.2 per cent below the 2024 result, full import and export containers closed the year with increases of 4 per cent and 3 per cent respectively. In the case of imports, 2025 closed at a new all-time record. China, the United States and Turkey once again remained the main trading partners of the port of Barcelona.

The Port Authority of Las Palmas also appears in the top 20, in sixteenth position. The authority, chaired by Beatriz Calzada, handled more than 1.5 million TEU in 2025, 16.3 per cent more than in the previous financial year, setting a new record in the historical series dating back to 2011.

### THE MEDITERRANEAN IS CONSOLIDATING ITS ROLE IN GLOBAL LOGISTICS CHAINS

The ports of Valencia and Algeciras, with several projects on the table to expand terminal capacity, remain among the EU's top six, although still far behind Rotterdam and Antwerp-Bruges, which operate in a league of their own.



Data in thousands of TEU (provisional). Source: Puertos del Estado and Port Authorities. Prepared by Transporte XXI.



TRAFFIC IN SPANISH PORTS | GENERAL TRENDS

# STALLING RECOVERY

## GEOPOLITICAL TENSIONS AND THE SLOWDOWN IN GLOBAL TRADE FREEZE TRAFFIC

Geopolitical and tariff tensions, together with the stagnation of global trade, slowed the recovery of traffic at Spanish ports in 2025, with volumes closing the year virtually flat compared with the previous year. The 28 port authorities, which comprise 46 ports of general interest, handled a total of 556.6 million tonnes, representing a slight decline of 0.2 per cent. Even so, the port system posted its third-best result after the 2019 record, prior to the pandemic, when volumes exceeded 564 million tonnes. According to the presentation format used, excluding domestic traffic, fishing and bunkering, ports handled 541.2 million tonnes. Also 0.2 per cent less. By cargo type, with the exception of dry bulk, all segments closed in positive territory.

**-0.2%**

**TRAFFIC RECORDS**  
A SLIGHT DECLINE  
IN 2025

General cargo, the largest segment with 278.8 million tonnes, accounting for more than half of total traffic (51 per cent), reached a new high. This segment recorded modest growth of 0.1 per cent. Within this category, the differing performance of conventional cargo stands out, rising by 3.6 per cent to 88.6 million tonnes, compared with contain-

erised cargo, which fell by 1.4 per cent to 199 million tonnes. Container traffic also reached record figures. Ports handled more than 18.6 million TEU, driven by import-export traffic (+7.8 per cent). By contrast, the downward trend in transshipment continued (-0.6 per cent), correcting the sharp increase recorded in 2024 due to route changes prompted by the Red Sea crisis.

Liquid bulk, for its part, regained momentum in the last quarter, closing 2025 with an increase of 0.9 per cent and 180.4 million tonnes.

Lastly, dry bulk fell by 3.4 per cent to 81.8 million tonnes. Puertos del Estado attributes this decline to the drop in coal (-10.4 per cent), in line with national and European energy policy, but also to the decrease in cereals (-18.4 per cent), as a result of lower imports following a strong domestic harvest after years of drought.

### STRONG CONCENTRATION

Spain's three leading ports –Algeciras, Valencia and Barcelona– located on the Mediterranean seaboard, account for 45% of traffic in the national port system, with volumes approaching 242 million tonnes in 2025, excluding domestic traffic, fishing and bunkering.

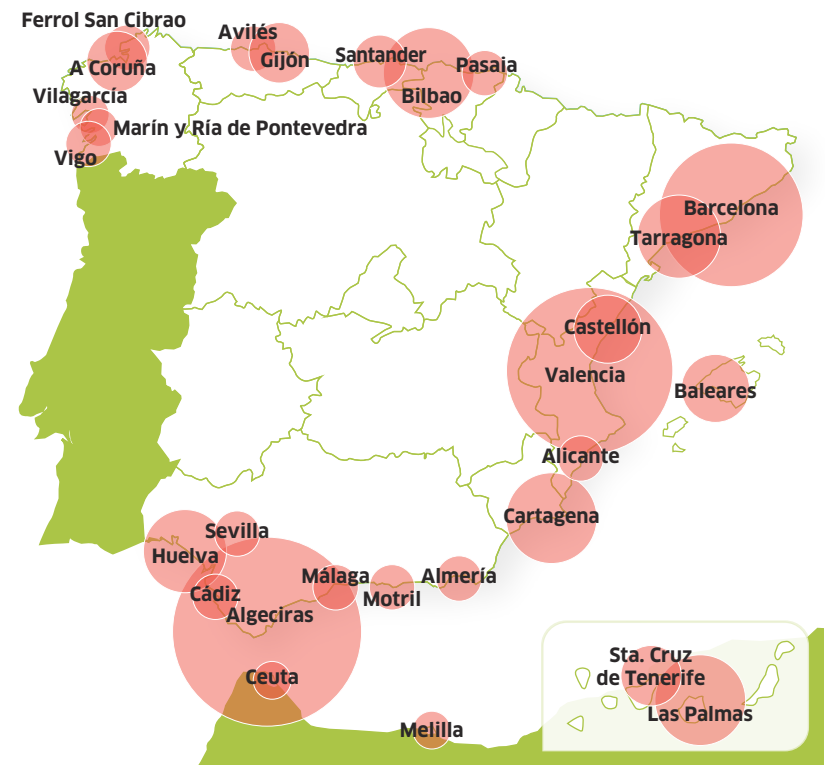


Chart based on traffic volumes. Source: Puertos del Estado.

**ISS**

**Intermodal Sea Solutions**  
A 100% intermodal international transport model

intermodalss.com  
Office: +34 942 33 89 78  
Terminal: +34 942 33 19 97  
ventas@intermodalss.com

At Intermodal Sea Solutions, we connect your goods to an extensive network of international destinations via fourteen maritime corridors strategically selected in the Atlantic arc

### ALMOST ONE MILLION FEWER TONNES

Ports lose cargo and move further away from the 2019 record, despite posting historic figures in general cargo.

				2025			
	2025	%25/24	%25/19	GENERAL C.	LIQUID BULK	DRY BULK	
Bahía de Algeciras	94,226	-3%	-10%	69%	30%	0%	
Valencia	80,062	-1%	-1%	92%	5%	3%	
Barcelona	67,707	-0%	+3%	69%	25%	6%	
Cartagena	34,132	-4%	+0%	3%	76%	21%	
Las Palmas	33,945	+18%	+40%	67%	32%	1%	
Bilbao	32,098	-7%	-9%	26%	61%	14%	
Huelva	29,852	-3%	-11%	6%	76%	18%	
Tarragona	29,248	-8%	-11%	7%	64%	29%	
Castellón	18,573	+7%	-10%	7%	49%	44%	
Baleares	17,513	+4%	+6%	89%	9%	2%	
Gijón	15,868	+2%	-9%	11%	10%	79%	
A Coruña	13,700	-6%	+2%	3%	69%	28%	
S.C. Tenerife	13,688	+5%	+10%	73%	24%	3%	
Santander	7,152	-0%	+9%	52%	3%	44%	
Ferrol - San Cibrao	6,989	+5%	-37%	13%	40%	48%	
Almería	6,067	+11%	+9%	27%	2%	71%	
Málaga	5,515	+25%	+58%	79%	2%	20%	
Vigo	5,401	+1%	+30%	94%	1%	6%	
Bahía de Cádiz	5,373	+17%	+24%	45%	21%	34%	
Avilés	4,620	+1%	-9%	25%	13%	62%	
Sevilla	4,378	+3%	+0%	38%	12%	50%	
Pasaia	3,380	+0%	+6%	70%	0%	30%	
Alicante	2,876	-7%	-1%	48%	2%	50%	
Motril	2,861	+10%	+5%	18%	51%	30%	
Marín - Pontevedra	2,269	-11%	-7%	52%	0%	48%	
Ceuta	1,584	+33%	-8%	39%	61%	1%	
Vilagarcía	1,539	+9%	+17%	54%	21%	25%	
Melilla	542	+1%	-37%	85%	12%	3%	
<b>TOTAL</b>	<b>541,158</b>	<b>-0%</b>	<b>-2%</b>	<b>52%</b>	<b>33%</b>	<b>15%</b>	

GENERAL CARGO, WHICH ACCOUNTS FOR MORE THAN HALF OF PORT TRAFFIC, SETS A NEW RECORD IN 2025

Thousand tonnes. 2025 preliminary. Ship supply, fresh fish and local traffic not included. Source: Puertos del Estado.

Maritime Agency / Customs, Logistics and Transports / Yatching / Maritime Terminals (Termavi & Dart Reefer Terminal)

grupodavila.es

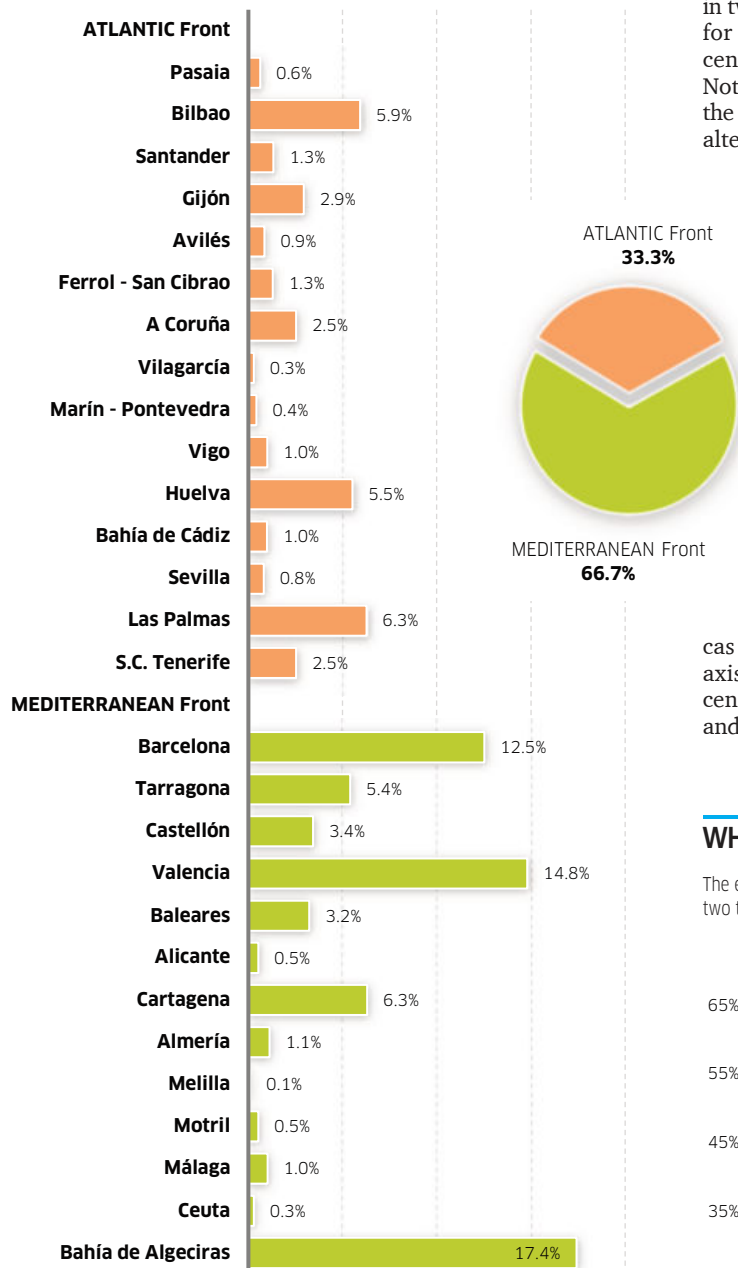
SPANISH PORT SECTOR | MARITIME FRONTS

# GLOBAL TRADE DRAWS THE SPANISH PORT SYSTEM MAP

THE MEDITERRANEAN SEABOARD, CLOSER TO THE SHIPPING ROUTE BETWEEN ASIA AND EUROPE, MAINTAINS THE GAP OVER ATLANTIC PORTS, IN A CONTEXT SHAPED BY GEOPOLITICS

## HARDLY ANY CHANGES

Mediterranean ports, with a 67% share, lost 1% of their traffic, while Atlantic ports grew by 1.6%. However, the gap between the two seaboards remains.



Spain, one of the European countries with the longest coastlines —close to 8,000 kilometres— is bordered by two seaboards, Mediterranean and Atlantic, with a division of port traffic expressed in two figures that have barely changed for years: 67 per cent versus 33 per cent. Mediterranean versus Atlantic. Not even 2025, an almost flat year for the Spanish port system (-0.2 per cent), altered that unequal balance.

Mediterranean ports lost 1 per cent of their traffic, while Atlantic ports grew by 1.6 per cent, but the gap between the two seaboards remains almost intact.

This is not a cyclical issue, nor the result of a single year. It is the reflection of a profound transformation in global maritime trade and of the role Spain plays within it. For much of the 20th century, the Atlantic seaboard concentrated the bulk of traffic, supported by its natural links with the Americas and northern Europe, when that axis dominated global trade. But the centre of gravity of commerce shifted and, with it, the new map of the Span-

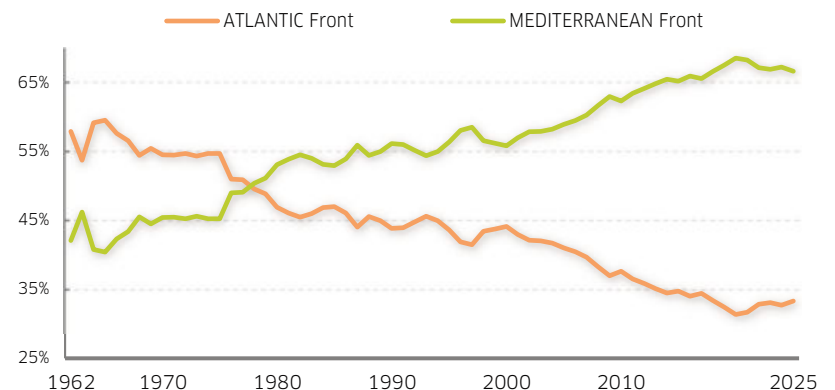
ish port system was redrawn. The emergence of Asia —and especially China— as the world's great industrial platform reconfigured shipping routes and turned the Mediterranean into a strategic artery of East-West traffic. Spain, located on one of the main corridors between Asia and Europe, saw its Mediterranean ports gain weight, scale and prominence within the national port system. Half a century later, that change continues to define the distribution of traffic. The ports on the Mediterranean seaboard, which in 2025 recorded traffic of 361 million tonnes, handle two thirds of the Spanish port system. Meanwhile, the Atlantic seaboard, once the great dominant force in maritime trade before the emergence of the Chinese giant as the "factory of the world", handled 180 million tonnes.

## Mediterranean dominance

Mediterranean leadership continues to be concentrated in three major enclaves: Algeciras, Valencia and Barcelona, which together handled last year 67 per cent of the traffic at ports on this seaboard and 45 per cent of the total cargo of the Spanish port system (excluding domestic traffic, bunkering and fishing).

## WHEN ASIA CHANGED THE AXIS OF SPANISH PORTS

The emergence of China as a major industrial platform defined the distribution of traffic in Spanish ports: two thirds in the Mediterranean; one third in the Atlantic, once the great dominant force in maritime trade.



Share of total cargo in the Spanish port system. Source: Puertos del Estado.

Algeciras, on the strategic Strait of Gibraltar, remains Spain's leading port and Europe's fourth-largest. In 2025, it handled 94 million tonnes (-3.1 per cent), including both bulk and general cargo. Its market share stands at 17.4 per cent. Valencia, with 80 million tonnes (-0.7 per cent), reinforces its role as Europe's leading container port in the Mediterranean, with 5.7 million TEU (+3.4 per cent). Barcelona, in third position, also recorded a slight decline of 0.2 per cent, reaching 67.7 million tonnes.

**Las Palmas steps up the pace**


On the Atlantic seaboard, Las Palmas, one of the major beneficiaries of the Red Sea crisis, has taken first place, overtaking Bilbao and Huelva. The port authority increased its traffic by 18 per cent, to almost 34 million tonnes in 2025. The diversion of shipping lines from the Suez Canal to the Cape of Good Hope has placed the Canary Islands in a key position as a refuelling and provisioning port on the Asia-Europe route.

Also standing out on this seaboard is the strong growth posted by Cádiz, up 17 per cent, with 5.4 million tonnes.



# PORT OF SANTANDER

CONNECTING THE FUTURE



CARGO HANDLING

COMMITMENT TO SUSTAINABILITY

PASSENGERS, FERRY & CRUISE SERVICES

STORAGE & DISTRIBUTION

CONTAINERS

BREAKBULK

GLOBAL CONNECTIONS

VEHICLE TRAFFIC

LOGISTICS

comercial@puertosantander.com · www.puertosantander.es

port\_santander
 Autoridad-Portuaria-de-Santander

**TRAFFIC IN SPANISH PORTS | HISTORIC EVOLUTION**

**PORT AUTHORITIES BY TOTAL CARGO 2025**

	2025	2024	2023	2022	2021	2020	2019	2010	2000	1990	1980	1970
<b>BAHÍA DE ALGECIRAS</b>												
Total Cargo (kt)	94,226	97,192	97,238	99,719	99,378	103,596	104,882	65,435	44,016	24,538	21,813	8,118
General Cargo	65,443	68,142	70,260	71,056	70,587	74,731	73,331	40,321	22,984	6,932	2,980	257
Liquid Bulk	28,509	28,811	26,530	27,287	28,126	28,312	30,577	23,638	18,205	16,061	18,704	7,858
Dry Bulk	274	239	448	1,376	664	553	974	1,476	2,828	1,545	129	3
Port Throughput * (kt)	100,719	104,130	104,829	107,251	105,076	107,323	109,415	70,276	47,560	26,347	22,954	8,274
Containers (TEU)	4,738,146	4,712,793	4,733,526	4,767,282	4,799,497	5,107,873	5,125,385	2,806,884	2,009,122	552,555	240,488	0
<b>VALENCIA</b>												
Total Cargo (kt)	80,062	80,666	76,746	78,963	84,851	80,545	80,728	63,741	25,218	11,976	7,821	4,025
General Cargo	73,678	74,462	68,984	70,889	78,824	76,012	75,418	55,979	18,839	6,527	2,834	1,165
Liquid Bulk	3,950	3,443	5,297	5,819	3,868	2,673	3,120	5,171	1,741	2,113	2,074	1,419
Dry Bulk	2,434	2,762	2,466	2,255	2,159	1,859	2,190	2,591	4,638	3,336	2,913	1,441
Port Throughput * (kt)	80,672	81,255	77,164	79,366	85,270	80,882	81,064	64,029	25,394	12,172	8,004	4,103
Containers (TEU)	5,662,661	5,475,773	4,796,985	5,052,272	5,604,478	5,428,307	5,439,827	4,206,937	1,308,010	387,162	117,916	0
<b>BARCELONA</b>												
Total Cargo (kt)	67,707	67,820	62,454	69,088	64,973	58,471	65,958	42,758	29,805	18,030	16,364	9,811
General Cargo	47,001	49,338	44,744	49,018	48,169	41,596	45,754	27,647	17,585	6,444	4,312	2,920
Liquid Bulk	16,630	13,683	12,915	15,530	12,345	12,862	16,132	11,575	8,966	7,438	6,135	3,224
Dry Bulk	4,075	4,800	4,795	4,540	4,460	4,013	4,071	3,535	3,254	4,148	5,918	3,667
Port Throughput * (kt)	69,446	69,699	64,018	70,914	66,411	59,497	67,693	43,679	30,160	18,421	16,839	10,087
Containers (TEU)	3,726,624	3,885,736	3,280,084	3,525,010	3,531,324	2,958,040	3,324,651	1,931,033	1,387,570	447,920	186,470	0
<b>CARTAGENA</b>												
Total Cargo (kt)	34,132	35,714	37,532	36,384	31,036	32,708	34,099	19,173	17,232	13,684	13,461	15,705
General Cargo	911	1,001	942	1,005	967	1,078	1,255	937	481	1,150	406	319
Liquid Bulk	26,004	25,932	27,835	28,011	24,047	25,161	26,008	15,122	13,751	11,245	11,673	14,941
Dry Bulk	7,217	8,781	8,755	7,368	6,021	6,469	6,836	3,114	3,000	1,289	1,382	446
Port Throughput * (kt)	34,389	35,926	37,773	36,588	31,213	32,895	34,282	19,230	17,349	13,794	13,767	16,039
Containers (TEU)	39,035	54,022	50,689	52,523	50,579	57,072	67,606	64,489	39,501	21,446	8,912	0
<b>LAS PALMAS</b>												
Total Cargo (kt)	33,945	28,852	25,542	25,748	25,929	23,437	24,169	20,444	14,300	7,507	4,121	4,715
General Cargo	22,605	19,679	18,258	17,576	17,249	15,223	15,646	15,175	8,737	4,021	2,330	1,493
Liquid Bulk	10,877	8,758	6,905	7,809	8,257	7,818	8,070	4,520	4,129	2,779	1,415	3,036
Dry Bulk	462	414	380	363	424	397	453	750	1,434	707	377	186
Port Throughput * (kt)	36,852	31,764	27,870	28,288	28,209	25,768	26,690	22,615	16,206	9,715	5,993	8,501
Containers (TEU)	1,543,474	1,329,768	1,205,296	1,164,111	1,176,501	1,033,486	1,006,853	1,113,262	621,104	216,724	64,224	0
<b>BILBAO</b>												
Total Cargo (kt)	32,098	34,441	32,803	32,766	31,183	29,544	35,446	33,662	27,519	25,205	21,812	9,565
General Cargo	8,200	8,555	8,240	8,561	8,767	7,719	9,944	9,446	8,302	4,376	3,604	3,317
Liquid Bulk	19,526	21,570	20,644	20,453	17,765	18,157	20,822	19,763	14,764	14,413	13,124	2,225
Dry Bulk	4,373	4,315	3,919	3,753	4,651	3,668	4,681	4,452	4,453	6,416	5,084	4,024
Port Throughput * (kt)	32,122	34,592	32,933	32,890	31,299	29,645	35,561	34,666	28,639	30,066	24,234	11,026
Containers (TEU)	423,930	458,926	492,336	496,624	538,917	485,777	628,426	531,457	434,362	189,005	89,999	0
<b>HUELVA</b>												
Total Cargo (kt)	29,852	30,887	29,784	31,878	30,402	29,673	33,577	22,121	17,806	10,009	9,885	8,595
General Cargo	1,821	1,741	1,455	1,295	1,190	1,300	1,145	283	934	379	391	168
Liquid Bulk	22,590	23,853	22,658	24,871	24,182	23,486	26,676	16,505	11,665	6,263	5,245	5,464
Dry Bulk	5,441	5,293	5,671	5,712	5,030	4,887	5,756	5,333	5,207	3,366	4,250	2,964
Port Throughput * (kt)	30,301	31,109	30,084	32,144	30,686	29,919	33,814	22,431	17,871	10,138	10,078	8,867
Containers (TEU)	149,384	107,166	88,802	81,344	80,589	83,802	73,978	0	0	2	751	0
<b>TARRAGONA</b>												
Total Cargo (kt)	29,248	31,675	32,474	29,386	31,168	26,341	32,708	32,600	27,357	24,244	19,458	4,391
General Cargo	1,945	1,690	1,731	2,386	2,283	1,541	1,779	3,655	932	616	859	581
Liquid Bulk	18,819	20,758	20,568	17,668	21,141	18,320	21,211	19,494	17,190	17,067	14,076	2,192
Dry Bulk	8,484	9,227	10,175	9,332	7,744	6,481	9,719	9,452	9,235	6,561	4,523	1,618
Port Throughput * (kt)	29,463	31,858	32,681	29,695	31,276	26,509	32,802	32,773	27,573	24,826	19,832	4,447
Containers (TEU)	15,563	14,425	34,132	83,333	54,759	43,788	47,985	255,407	44,855	18,327	5,021	0
<b>CASTELLÓN</b>												
Total Cargo (kt)	18,573	17,431	15,712	20,907	21,202	18,507	20,697	12,447	9,845	7,845	5,443	5,877
General Cargo	1,239	1,254	1,084	1,487	1,904	1,978	2,998	1,838	612	477	663	233
Liquid Bulk	9,171	8,501	8,150	10,264	9,913	9,802	10,602	7,667	7,670	6,933	4,579	5,325
Dry Bulk	8,163	7,677	6,478	9,156	9,385	6,727	7,097	2,941	1,563	435	202	319
Port Throughput * (kt)	18,601	17,461	15,743	20,942	21,237	18,542	20,721	12,484	9,889	7,895	5,509	5,990
Containers (TEU)	99,416	87,278	71,890	103,254	129,877	130,972	202,828	103,956	19,783	3,835	12,648	0
<b>BALEARES</b>												
Total Cargo (kt)	17,513	16,880	16,074	15,433	13,727	12,327	16,524	11,576	10,230	6,122	2,664	1,745
General Cargo	15,559	14,942	14,214	13,503	12,256	10,823	13,757	7,953	6,726	3,784	1,616	789
Liquid Bulk	1,632	1,579	1,473	1,548	1,115	979	1,544	1,763	1,622	1,099	846	521
Dry Bulk	322	359	387	382	357	525	1,224	1,860	1,882	1,239	202	436
Port Throughput * (kt)	17,641	17,040	16,223	15,521	13,773	12,367	16,812	11,722	10,574	6,389	3,094	2,029
Containers (TEU)	84,724	84,427	91,469	97,232	106,942	91,883	120,400	78,425	282,451	171,486	93,965	0

PORT AUTHORITIES BY TOTAL CARGO 2025

	2025	2024	2023	2022	2021	2020	2019	2010	2000	1990	1980	1970
<b>GIJÓN</b>												
Total Cargo (kt)	15,868	15,618	18,962	19,066	16,619	16,103	17,371	15,590	19,485	11,570	12,388	6,145
General Cargo	1,718	1,802	1,552	1,283	1,653	1,846	1,887	958	616	247	758	591
Liquid Bulk	1,581	1,736	1,298	844	756	641	895	1,237	1,451	1,244	1,966	780
Dry Bulk	12,569	12,081	16,112	16,939	14,210	13,616	14,589	13,394	17,418	10,079	9,664	4,775
Total Cargo * (kt)	15,884	15,655	18,991	19,100	16,668	16,131	17,392	15,719	19,807	11,801	12,558	6,291
Containers (TEU)	68,798	70,160	64,667	46,672	57,559	84,735	75,857	35,570	19,204	6,507	491	0
<b>A CORUÑA</b>												
Total Cargo (kt)	13,700	14,575	13,880	14,817	11,783	10,505	13,451	11,876	11,655	11,380	8,715	6,722
General Cargo	464	541	577	897	853	840	1,006	1,099	296	181	910	85
Liquid Bulk	9,467	9,820	8,075	8,528	7,997	7,116	8,970	7,586	7,632	9,078	6,551	5,972
Dry Bulk	3,769	4,214	5,228	5,392	2,934	2,548	3,475	3,192	3,727	2,121	1,254	664
Total Cargo * (kt)	13,797	14,690	13,982	14,919	11,878	10,599	13,697	12,265	12,614	12,590	9,298	7,184
Containers (TEU)	7	34	14	10	3	3	6	5,623	2	193	1,177	0
<b>SANTA CRUZ DE TENERIFE</b>												
Total Cargo (kt)	13,688	13,029	12,404	11,651	10,681	10,447	12,441	14,823	15,881	12,026	12,903	14,344
General Cargo	9,944	9,053	8,286	7,552	7,196	6,671	7,208	5,781	5,851	3,411	1,779	1,354
Liquid Bulk	3,327	3,640	3,742	3,690	3,035	3,397	4,811	8,223	8,529	7,650	10,590	12,863
Dry Bulk	417	336	376	409	449	378	422	819	1,502	965	535	127
Total Cargo * (kt)	14,487	13,949	13,143	12,269	11,130	10,950	13,094	15,968	16,974	13,198	14,580	15,965
Containers (TEU)	543,002	508,855	496,668	479,698	435,909	376,762	410,968	357,472	393,371	150,306	80,426	0
<b>SANTANDER</b>												
Total Cargo (kt)	7,152	7,181	6,989	6,415	6,737	5,838	6,557	4,947	5,262	4,082	4,300	3,163
General Cargo	3,741	3,661	2,945	2,762	2,991	2,598	2,587	1,657	1,240	773	755	711
Liquid Bulk	230	166	212	242	208	214	324	411	379	690	1,631	1,342
Dry Bulk	3,180	3,354	3,833	3,410	3,538	3,026	3,647	2,880	3,643	2,619	1,915	1,110
Total Cargo * (kt)	7,205	7,240	7,043	6,456	6,768	5,867	6,586	5,014	5,349	4,141	4,410	3,340
Containers (TEU)	161,001	149,644	57,371	29,557	37,758	26,149	14,316	1,520	3,358	380	2,665	0
<b>FERROL - SAN CIBRAO</b>												
Total Cargo (kt)	6,989	6,654	8,437	11,796	9,943	10,021	11,170	10,681	8,456	1,243	806	609j
General Cargo	893	673	995	978	777	713	763	629	588	223	224	205
Liquid Bulk	2,766	2,286	3,642	3,962	3,172	2,936	2,312	2,617	823	46	130	73
Dry Bulk	3,330	3,695	3,801	6,856	5,994	6,371	8,095	7,435	7,045	974	451	330
Total Cargo * (kt)	7,016	6,668	8,452	11,811	9,964	10,035	11,183	10,709	8,499	1,278	864	766
Containers (TEU)	22,564	14,208	25,487	37,101	16,844	12,473	8,278	440	63	0	0	0
<b>ALMERÍA**</b>												
Total Cargo (kt)	6,067	5,486	5,193	5,501	5,780	4,782	5,558	3,774	8,875	6,721	4,530	1,451
General Cargo	1,664	1,486	1,257	1,483	1,451	1,214	1,089	557	547	305	142	92
Liquid Bulk	122	123	33	104	141	107	57	4	991	232	418	359
Dry Bulk	4,281	3,878	3,903	3,914	4,189	3,461	4,412	3,213	7,337	6,183	3,970	1,000
Total Cargo * (kt)	6,150	5,584	5,290	5,584	5,829	4,827	5,640	3,863	8,964	6,803	4,590	1,500
Containers (TEU)	19,527	17,016	16,774	22,068	25,270	23,924	23,476	2,763	255	828	0	0
<b>MÁLAGA</b>												
Total Cargo (kt)	5,515	4,428	2,459	4,338	4,429	2,701	3,486	2,262	3,646	9,141	8,019	3,888
General Cargo	4,344	3,056	969	2,851	2,691	1,062	1,938	1,435	395	568	717	265
Liquid Bulk	89	113	139	113	237	212	84	55	1,998	7,639	6,589	3,305
Dry Bulk	1,081	1,260	1,352	1,374	1,501	1,428	1,465	773	1,253	934	713	318
Total Cargo * (kt)	5,614	4,514	2,558	4,414	4,493	2,764	3,590	2,354	3,765	9,242	8,171	4,017
Containers (TEU)	355,401	216,629	40,592	227,873	236,811	123,871	209,226	298,401	4,062	3,051	4,018	0
<b>VIGO</b>												
Total Cargo (kt)	5,401	5,352	4,659	4,552	4,643	4,337	4,165	3,977	3,511	2,695	1,866	1,783
General Cargo	5,059	5,054	4,306	4,216	4,254	3,978	3,820	3,423	2,962	1,382	658	260
Liquid Bulk	29	39	36	32	52	58	47	95	45	888	789	523
Dry Bulk	312	260	317	304	337	301	298	459	504	424	418	1,000
Total Cargo * (kt)	5,561	5,502	4,826	4,715	4,809	4,496	4,387	4,352	3,877	3,225	2,545	2,428
Containers (TEU)	309,153	298,005	226,555	226,121	239,302	228,728	216,500	213,123	145,460	67,348	19,299	0
<b>BAHÍA DE CÁDIZ</b>												
Total Cargo (kt)	5,373	4,598	5,620	5,553	4,827	4,361	4,342	3,834	4,490	2,820	1,052	2,233
General Cargo	2,420	2,409	2,138	2,203	2,438	1,646	1,151	2,042	2,499	1,783	743	474
Liquid Bulk	1,141	533	1,255	1,472	1,081	1,271	1,332	105	217	250	101	0
Dry Bulk	1,812	1,656	2,227	1,878	1,308	1,444	1,859	1,687	1,775	786	208	1,758
Total Cargo * (kt)	5,517	4,729	5,748	5,717	4,943	4,449	4,443	4,006	4,653	3,145	1,285	2,423
Containers (TEU)	211,717	221,766	199,870	217,497	214,868	108,914	57,839	109,187	76,361	79,095	44,631	0
<b>AVILÉS</b>												
Total Cargo (kt)	4,620	4,585	4,523	4,444	4,620	4,051	5,088	4,541	4,074	3,749	5,061	5,845
General Cargo	1,164	1,161	1,111	997	1,138	856	1,572	1,170	1,095	1,846	1,419	1,960
Liquid Bulk	579	585	657	651	602	675	718	623	650	554	355	81
Dry Bulk	2,878	2,839	2,755	2,795	2,880	2,519	2,797	2,747	2,329	1,349	3,286	3,804
Total Cargo * (kt)	4,696	4,651	4,581	4,513	4,705	4,122	5,146	4,590	4,138	3,823	5,142	5,976
Containers (TEU)	0	0	0	0	22	0	4	0	12	0	0	0

## TRAFFIC IN SPANISH PORTS | HISTORIC EVOLUTION

## PORT AUTHORITIES BY TOTAL CARGO 2025

	2025	2024	2023	2022	2021	2020	2019	2010	2000	1990	1980	1970
<b>SEVILLA</b>												
Total Cargo (kt)	4,378	4,238	3,915	3,784	4,179	4,202	4,356	4,366	4,480	3,036	3,329	2,495
General Cargo	1,665	1,638	1,507	1,594	1,659	1,638	1,769	1,999	1,522	737	881	607
Liquid Bulk	519	568	443	421	360	347	293	233	262	176	1,034	1,190
Dry Bulk	2,193	2,032	1,964	1,770	2,160	2,217	2,294	2,133	2,695	2,123	1,414	697
Port Throughput * (kt)	4,415	4,273	3,952	3,817	4,205	4,229	4,394	4,366	4,492	3,070	3,414	2,582
Containers (TEU)	156,644	152,328	143,358	141,231	135,742	126,163	136,627	152,612	91,095	30,811	22,505	0
<b>PASAIA</b>												
Total Cargo (kt)	3,380	3,375	3,449	3,268	3,494	2,993	3,198	3,840	4,605	3,737	4,945	3,236
General Cargo	2,378	2,436	2,384	2,364	2,390	1,984	2,167	2,183	1,630	2,329	2,537	1,014
Liquid Bulk	0	0	0	0	0	0	0	0	160	583	1,393	996
Dry Bulk	1,002	938	1,064	904	1,104	1,009	1,031	1,657	2,816	824	1,016	1,225
Port Throughput * (kt)	3,428	3,418	3,494	3,312	3,537	3,037	3,245	3,898	4,671	3,824	5,233	3,566
Containers (TEU)	2	0	0	0	0	4,366	0	0	0	19,379	4,065	0
<b>ALICANTE</b>												
Total Cargo (kt)	2,876	3,101	3,183	3,213	2,634	2,715	2,896	2,189	2,981	2,500	2,513	1,367
General Cargo	1,393	1,237	1,303	1,523	1,292	1,284	1,424	1,335	1,305	711	1,450	660
Liquid Bulk	53	67	47	30	42	34	32	128	161	1,079	889	443
Dry Bulk	1,430	1,797	1,833	1,659	1,300	1,397	1,441	727	1,514	710	174	263
Port Throughput * (kt)	2,907	3,124	3,211	3,235	2,647	2,731	2,919	2,203	3,047	2,556	2,552	1,405
Containers (TEU)	193,416	180,818	171,729	210,344	173,058	158,031	171,270	147,308	113,110	39,883	58,222	0
<b>MOTRIL**</b>												
Total Cargo (kt)	2,861	2,600	2,524	2,129	2,512	2,194	2,737	1,926	-	-	-	-
General Cargo	2,861	2,600	2,524	2,129	2,512	2,194	2,737	1,926	-	-	-	-
Liquid Bulk	1,473	1,278	1,293	1,334	1,598	1,399	1,324	1,283	-	-	-	-
Dry Bulk	872	753	689	650	742	539	618	473	-	-	-	-
Port Throughput * (kt)	2,889	2,625	2,552	2,148	2,530	2,215	2,776	1,941	-	-	-	-
Containers (TEU)	178	431	738	12	0	67	613	2,965	-	-	-	-
<b>MARÍN - PONTEVEDRA</b>												
Total Cargo (kt)	2,269	2,544	2,090	2,077	2,146	2,057	2,438	1,938	1,567	533	409	295
General Cargo	1,175	1,174	1,060	1,038	1,188	1,192	1,550	978	863	192	211	126
Liquid Bulk	0	0	0	0	0	0	0	0	0	19	2	26
Dry Bulk	1,094	1,370	1,030	1,040	958	865	889	961	704	322	197	144
Port Throughput * (kt)	2,297	2,573	2,121	2,118	2,178	2,088	2,472	1,979	1,684	659	511	631
Containers (TEU)	42,752	48,255	44,733	45,988	41,099	44,288	76,645	48,685	29,147	401	0	0
<b>CEUTA</b>												
Total Cargo (kt)	1,584	1,192	1,219	1,257	1,094	1,296	1,729	1,955	2,266	2,825	1,834	809
General Cargo	615	591	536	569	599	560	833	872	723	888	537	188
Liquid Bulk	961	597	675	682	479	715	872	944	1,479	1,898	1,258	612
Dry Bulk	8	4	7	6	16	21	25	139	64	39	39	9
Port Throughput * (kt)	2,424	1,772	1,862	1,940	1,573	1,852	2,502	2,625	2,896	3,596	2,504	1,519
Containers (TEU)	5,718	5,174	5,356	5,365	5,874	6,020	10,798	9,546	11,480	4,042	840	0
<b>VILAGARCÍA</b>												
Total Cargo (kt)	1,539	1,407	1,545	1,490	1,504	1,205	1,315	729	990	415	504	185
General Cargo	832	709	675	789	804	657	653	131	289	79	166	105
Liquid Bulk	324	286	298	300	274	233	183	189	279	115	42	22
Dry Bulk	383	412	572	401	426	314	480	409	421	220	295	58
Port Throughput * (kt)	1,547	1,416	1,552	1,498	1,511	1,210	1,321	738	1,002	511	1,253	347
Containers (TEU)	39,121	32,925	29,087	33,135	33,937	35,890	41,257	589	0	0	0	0
<b>MELILLA</b>												
Total Cargo (kt)	542	535	528	571	595	621	859	818	783	458	324	1,042
General Cargo	462	454	452	480	491	518	776	703	633	408	208	175
Liquid Bulk	65	64	64	64	65	65	76	72	86	35	41	39
Dry Bulk	15	17	12	28	39	38	7	43	63	14	75	828
Port Throughput * (kt)	543	540	536	576	602	625	864	835	802	470	359	1,101
Containers (TEU)	4,421	5,656	6,425	5,812	7,919	11,276	17,955	22,389	18,049	6,134	856	0
<b>TOTAL SPANISH PORT SYSTEM</b>												
Total Cargo (kt)	541,158	542,060	527,937	546,195	532,069	505,577	551,946	418,023	326,335	232,400	212,494	133,080
General Cargo	278,848	278,508	262,507	270,499	276,231	261,514	274,012	190,355	109,186	51,105	38,725	22,093
Containerised	190,256	192,990	178,717	187,553	198,283	193,783	195,290	137,813	66,860	22,913	10,357	x
Non containerised	88,592	85,518	83,790	82,946	77,948	67,732	78,723	52,542	42,327	28,192	28,367	x
Liquid Bulk	180,436	178,788	174,883	181,729	170,857	166,991	187,090	149,023	124,845	118,330	114,374	75,340
Dry Bulk	81,874	84,764	90,547	93,967	84,981	77,071	90,844	78,644	92,304	62,965	59,395	35,648
Other (kt)	15,427	15,698	15,275	15,545	12,351	9,997	12,558	13,305	12,114	15,635	14,494	13,007
Fresh fish	132	128	131	148	163	163	205	235	282	947	1,325	1,219
Ship supply	11,453	11,935	11,062	11,579	9,506	7,899	10,047	9,715	8,444	7,788	9,492	9,656
Local traffic	3,841	3,635	4,081	3,819	2,682	1,935	2,306	3,355	3,388	6,900	3,677	2,131
Port Throughput * (kt)	556,585	557,758	543,211	561,741	544,420	515,574	564,504	431,327	338,449	248,035	226,988	146,087
Containers (TEU)	18,616,376	18,132,218	16,374,631	17,151,468	17,735,438	16,792,659	17,509,574	12,500,043	7,051,787	2,416,820	1,157,370	0
Vessels	162,865	166,611	164,470	157,105	138,889	117,829	170,944	122,695	119,790	98,530	107,482	104,469

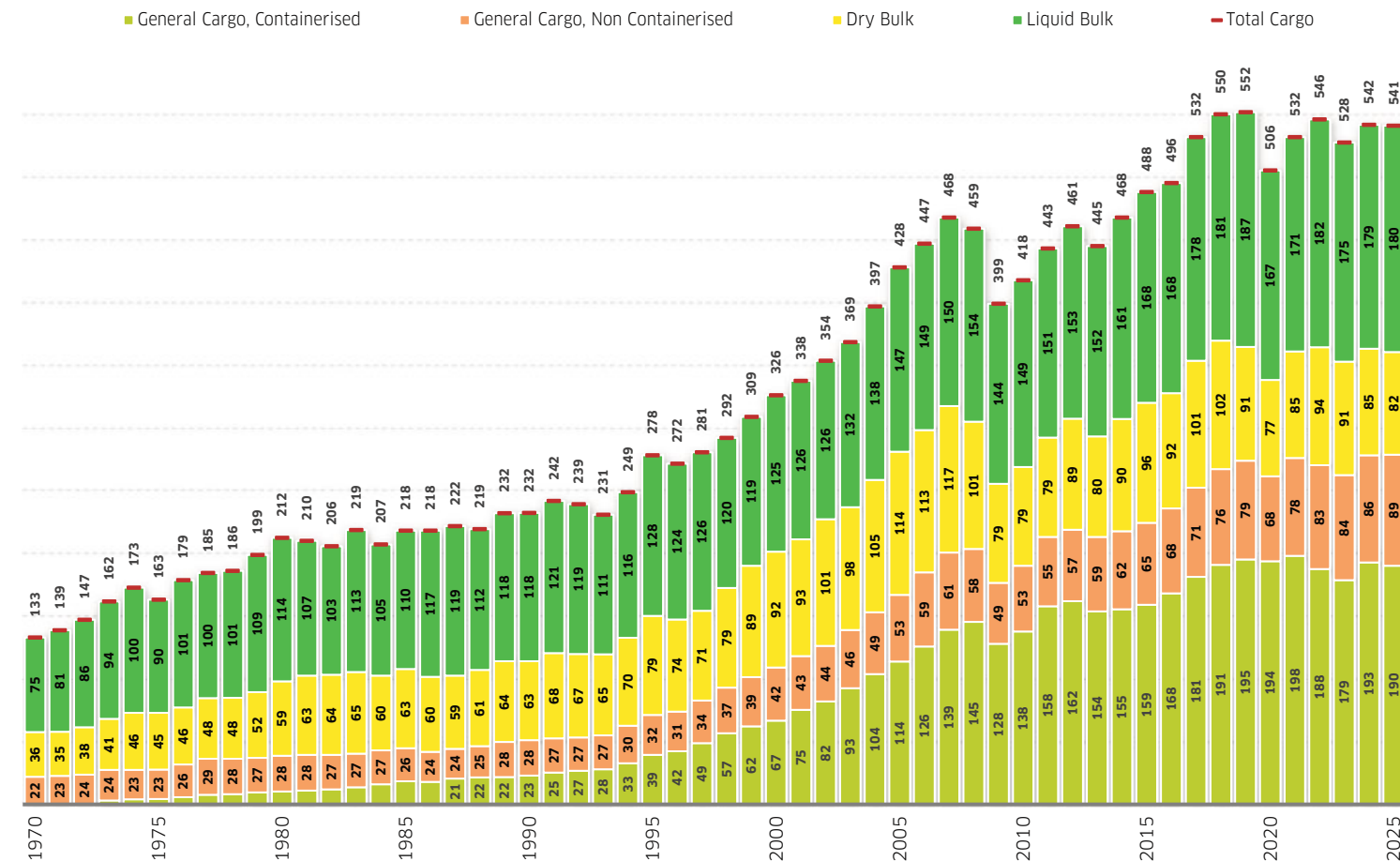
Preliminary 2025 data. (\*): Includes fresh fish, ship supply and local traffic. (\*\*): Motril was part of Almeria Port Authority until 2005. Source: Puertos del Estado

HISTORICAL SUMMARY OF TRAFFIC IN SPANISH PORTS

	TOTAL TRAFFIC	TOTAL THROUGHPUT	BULK		GENERAL CARGO			TEU				SHIP		LOCAL	RO-RO	VESSELS		CRUISE
			LIQUID	DRY	TOTAL	CONTAIN.	NON CONT.	TOTAL	TRANSIT	IMP-EXP	CABOTAGE	SUPPLY	BUNKERING	TRAFFIC		MERCHANT	CRUISES	PASSENGERS
1970	146.09	133.08	75.34	35.65	22.09	-	-	-	-	-	-	9.66	-	2.13	-	104,469	-	-
1980	226.99	212.49	114.37	59.40	38.72	10.36	28.37	1,157	-	-	-	9.49	-	3.68	-	107,482	-	-
1990	248.03	232.40	118.33	62.97	51.10	22.91	28.19	2,417	-	-	-	7.79	-	6.90	-	98,530	-	-
2000	338.45	326.34	124.85	92.30	109.19	66.86	42.33	7,052	-	-	-	8.44	5.53	3.39	-	119,790	-	-
2005	442.00	428.20	146.99	114.10	167.11	113.84	53.27	11,049	5,199	-	-	10.45	7.15	3.12	38.68	117,149	3,112	3,994
2006	462.16	447.28	148.80	113.45	185.03	125.78	59.24	12,044	5,839	-	-	10.65	7.40	3.99	43.02	119,819	3,111	4,089
2007	483.14	467.98	150.41	116.86	200.71	139.35	61.36	13,189	6,771	4,340	2,217	10.95	7.66	3.98	44.61	130,211	3,547	5,034
2008	473.82	459.05	153.96	101.35	203.74	145.40	58.33	13,335	7,014	4,343	1,976	10.83	7.59	3.73	42.75	121,713	3,612	5,884
2009	413.04	399.24	143.53	79.13	176.58	127.93	48.65	11,749	6,367	3,725	1,652	10.48	7.62	3.08	38.12	113,717	3,367	6,063
2010	431.33	418.02	149.02	78.64	190.36	137.81	52.54	12,500	6,587	3,729	1,616	9.71	7.34	3.36	39.84	122,695	3,616	7,132
2011	457.97	443.26	150.75	79.25	213.26	157.97	55.29	13,920	7,689	4,615	1,585	10.94	8.14	3.53	41.53	140,383	3,896	8,020
2012	475.20	461.06	153.38	88.58	219.10	162.14	56.96	14,085	7,689	4,892	1,496	10.43	8.31	3.48	41.68	133,582	3,722	7,597
2013	458.53	445.37	151.82	80.23	213.32	153.96	59.36	13,897	7,344	5,028	1,524	9.83	7.73	3.10	44.43	131,127	3,846	7,671
2014	482.08	468.10	160.71	89.56	217.83	155.49	62.34	14,206	7,612	4,950	1,644	10.10	8.04	3.64	48.01	138,705	3,703	7,711
2015	502.44	488.43	168.05	95.97	224.41	159.28	65.13	14,293	7,427	5,106	1,729	10.18	8.08	3.61	51.15	146,732	3,857	8,647
2016	509.50	495.61	167.58	91.99	236.03	168.29	67.74	15,154	7,923	5,272	1,927	10.32	8.20	3.34	53.45	151,564	3,920	8,694
2017	545.22	532.14	178.24	101.43	252.47	181.45	71.01	15,952	8,501	5,478	1,972	10.12	7.99	2.72	58.07	155,631	4,238	9,282
2018	563.56	550.46	180.72	102.37	267.37	191.03	76.34	17,203	9,268	5,900	2,029	10.30	8.14	2.58	62.68	167,119	4,361	10,170
2019	564.50	551.95	187.09	90.84	274.01	195.29	78.72	17,510	9,406	6,058	2,010	10.05	7.99	2.31	62.78	170,944	4,236	10,665
2020	515.57	505.58	166.99	77.07	261.51	193.78	67.73	16,793	9,382	5,606	1,804	7.90	6.54	1.93	57.08	117,829	744	1,369
2021	544.42	532.07	170.86	84.98	276.23	198.28	77.95	17,735	9,414	6,311	2,010	9.51	8.13	2.68	65.29	138,889	2,104	2,219
2022	561.74	546.20	181.73	93.97	270.50	187.55	82.95	17,151	8,827	6,227	2,097	11.58	9.81	3.82	70.96	157,105	4,528	8,184
2023	543.21	527.94	174.88	90.55	262.51	178.72	83.79	16,375	8,393	5,895	2,086	11.06	9.04	4.08	71.91	164,470	4,500	12,025
2024	557.76	542.06	178.79	84.76	278.51	192.99	85.52	18,132	9,674	6,371	2,087	11.93	9.95	3.64	72.68	166,611	4,704	12,837
2025	556.58	541.16	180.44	81.87	278.85	190.26	88.59	18,616	9,614	6,869	2,134	11.45	9.46	3.84	74.69	162,865	5,373	14,106

Data in millions of tonnes, except containers (thousands of TEUs), passengers (thousands) and vessels (units). Source: Puertos del Estado. Increase / Drop (Compared to the previous year) Records

EVOLUTION OF FREIGHT CARGO IN SPANISH PORTS



Million tonnes. 2025, preliminary. Source: Puertos del Estado.

OPINION | 2026, A DECISIVE YEAR

# SPAIN IS PLAYING FOR ITS PORT LEADERSHIP

**SARA BLANCO**

Ocean Capital Partners  
Partner and Head of  
Consultancy



Those of us who work in the sector are fully aware that the Spanish port system will face, in the coming months, an operating environment under a level of pressure rarely seen before. The context is, to say the least, complex. The constant changes in maritime traffic routes, global uncertainty and increasingly evident geopolitical tensions are having a direct impact on activity and, by extension, on the planning of the port authorities.

There is no doubt that 2026 will be a decisive year and one that will shape the future course of our ports. Not because of short-term results, but because of the decisions to be taken in terms of investment, operating model and competitive positioning. The ability of Spanish ports to maintain their market share will depend on how they respond, now and without delay, to these new challenges.

The Spanish port network starts from a favourable position. With 46 ports of general interest, our port system continues to play a significant role in the western Mediterranean. But we must be fully aware that competition has intensified. Ports located outside the European sphere operate with greater flexibility and less regulation, which forces Spanish enclaves to accelerate their modernisation and adaptation processes in order to preserve their attractiveness for operators and shipping lines.

The slight slowdown caused by the volatility of international trade confirms this trend. In this context, maintaining and gaining competitiveness requires stronger cooperation between ports, progress in joint traffic-capture strategies and continuous improvement in the reliability of the services provided to the logistics community.

Moreover, at Ocean Capital Partners we are convinced that the diversification of compatible activities within the same dock is becoming a relevant factor during off-peak periods in the core operation. It is clear that overly specialised ports face greater difficulties in absorbing changes in demand. Consequently, committing to the development of multipurpose terminals allows for greater operational flexibility, more efficient use of port space and a better capacity to adapt to the above-mentioned fluctuations in traffic.

Digitalisation is another key area. Ports need more automated and interconnected systems to improve information exchange and reduce administrative friction. Integration into smart port networks, better data flows and simplified procedures make it possible to shorten lead times, reduce costs and provide a more reliable service for the entire port community.

This progress requires a broad and dedicated cybersecurity framework. As the digital footprint expands, so too does exposure. The continuity of operations depends on prevention measures, early detection and incident response, as well as specific training and stable coordination between port authorities and operators. At the same time, ports are expanding their contribution to the logistics chain. Alongside cargo handling, they are incorporating other key operational services such as advanced storage, document management, energy solutions and participation in projects linked to new fuels. This diversifies revenues and improves adaptability in an environment with less predictable traffic flows and more intense competition.

Lastly, it should be remembered that port-city integration and the promotion of intermo-

dality are also essential elements in this adaptation process. Improving rail access, developing freight rail and fostering a more balanced relationship with urban environments all have a direct impact on the efficiency and sustainability of the port system. On this point, there are reasons for a degree of optimism: the investment plan scheduled for 2025-2029 provides a solid framework for moving forward along these lines of action, provided it ultimately translates into real operational improvements.

Amid this changing context, Spain has a starting point that should not be underestimated. I am referring to the strength of its port network and to a geographical position that remains, and will continue to remain, a key asset. The issue now is not only to preserve that advantage, but to know how to make the most of it. To achieve this, long-term vision, coordination among all stakeholders and a real capacity to implement what is planned will be required, so that it does not come to nothing. As I pointed out at the beginning, the port that lies ahead will be more efficient, more digital and more committed to sustainability. Moreover, the decisions taken now will determine the place Spanish ports will occupy in international maritime trade in the years ahead.

**THE PORT OF THE FUTURE WILL BE MORE EFFICIENT, MORE DIGITAL AND MORE COMMITTED TO SUSTAINABILITY**

# CONNECTING CONTINENTS

Over 100 years serving the Strait Logistics Chain



2025	2027
<b>+50</b> Daily RoRo/RoPax departures	<b>Rail</b> Motorway
<b>+12</b> Weekly rail services	<b>2030</b>
<b>+1,500</b> Port Community System users End-to-end traceability	<b>1,000,000</b> Ro-Ro units

Constant flow, maximum connectivity.  
Boosting logistics between Europe and Africa.

[www.apba.es](http://www.apba.es)



TRAFFIC IN SPANISH PORTS | LIQUID BULK

# FLAT GROWTH

THE PUSH FROM CHEMICAL PRODUCTS HAS NOT BEEN ENOUGH TO OFFSET THE DROP IN CRUDE OIL

The performance of liquid bulk did not deviate from the broader pattern, posting almost flat growth last year. Even so, its trend was slightly upward, the opposite of the average for overall traffic (-0.2 per cent).

These flows, which account for around 32 per cent of the total, closed the year at 180.4 million tonnes, that is, 1.6 million more than in 2024. Liquid bulk regained momentum in the last quarter, making it possible to close the year with growth of 1 per cent, Puertos del Estado said in a statement. This increase, however, was not enough to reach pre-pandemic volumes, namely the 187.1 million tonnes of liquid bulk that passed through the Spanish port system in 2019.

The performance of chemical products offset the decline in crude oil, the main liquid traffic, and by a wide margin. Around 30 out of every 100 tonnes of liquid bulk handled at Spanish docks are crude oil.

This product totalled 60.9 million tonnes, a decline of 5.7 per cent compared with 2024. Almost the same proportion, but in

reverse, was posted by diesel (+5.6 per cent), which reached 25.2 million tonnes.

Chemical products have not only consolidated the third position they achieved after doubling volumes last year. They continued to advance, up a further 10.2 per cent, reaching 23.4 million tonnes in 2025.

Gasoline, the fourth liquid product, also recorded double-digit growth (+12.9 per cent), reaching 21.5 million tonnes. And an even better year was posted by a transition fuel, natural gas, ranked fifth, which ultimately saw the strongest growth of all, up 18.4 per cent to 17 million tonnes. The other side of the coin was fuel oil, in sixth place, which fell by 13.2 per cent to 12.4 million tonnes.

The growth in diesel and gasoline traffic was in line with demand. Automotive fuel consumption increased by 2.5 per cent, according to the latest statistics available as this edition went to press from the Strategic Reserves Corporation for Petroleum Products (Cores), corresponding to cumulative figures through No-

## THREE PORTS STAND OUT IN THE 'TOP 10'

The port areas of Barcelona, Las Palmas and Valencia closed 2025 with double-digit growth, outperforming the overall average (+1).

	2025	%25/24	%25/19	2024	2023
Algeciras	28.5	-1%	-7%	28.8	26.5
Cartagena	26.0	+0%	-0%	25.9	27.8
Huelva	22.6	-5%	-15%	23.9	22.7
Bilbao	19.5	-9%	-6%	21.6	20.6
Tarragona	18.8	-9%	-11%	20.8	20.6
Barcelona	16.6	+22%	+3%	13.7	12.9
Las Palmas	10.9	+24%	+35%	8.8	6.9
A Coruña	9.5	-4%	+6%	9.8	8.1
Castellón	9.2	+8%	-13%	8.5	8.2
Valencia	3.9	+15%	+27%	3.4	5.3
S.C. Tenerife	3.3	-9%	-31%	3.6	3.7
Ferrol - San Cibrao	2.8	+21%	+20%	2.3	3.6
Baleares	1.6	+3%	+6%	1.6	1.5
Gijón	1.6	-9%	+77%	1.7	1.3
Motril	1.5	+15%	+11%	1.3	1.3
Cádiz	1.1	+114%	-14%	0.5	1.3
Ceuta	1.0	+61%	+10%	0.6	0.7
Avilés	0.6	-1%	-19%	0.6	0.7
Sevilla	0.5	-9%	+77%	0.6	0.4
Vilagarcía	0.3	+13%	+77%	0.3	0.3
Santander	0.2	+39%	-29%	0.2	0.2
Almería	0.1	-0%	+116%	0.1	0.0
Málaga	0.1	-21%	+7%	0.1	0.1
Melilla	0.1	+1%	-14%	0.1	0.1
Alicante	0.1	-21%	+69%	0.1	0.0
Vigo	0.0	-24%	-37%	0.0	0.0
Marín - Pontevedra	-	-	-100%	-	-
Pasaia	-	-	-	-	-
<b>TOTAL</b>	<b>180.4</b>	<b>+1%</b>	<b>-4%</b>	<b>178.8</b>	<b>174.9</b>

Million tonnes. 2025, preliminary. Source: Puertos del Estado.

TRANSITION ENERGY, THE FASTEST-GROWING SEGMENT

DIESEL AND GASOLINE, KEEPING PACE WITH DEMAND





Depósitos Portuarios

STORAGE FOR BULK LIQUIDS AT BILBAO PORT



Stainless and carbon steel tanks, thermally insulated and heated



Customs Warehouse and Bonded Warehouse



46,000 m3 total capacity



500 m berth with connection every 50 m



Over 75 years of experience



Terminal connected by sea, train and road

Muelle Reina Victoria 19 - P.O. Box, 16  
48980 Santurtzi (Bizkaia) Spain  
☎ (+34) 944 611 852  
webmaster@deposa.euskalnet.net



www.depositosportuarios.com

vember. The increase was mainly in gasoline (+7.6 per cent), while growth in diesel consumption was more modest (+2.6 per cent). And the performance of natural gas traffic was also in line with demand, with consumption rising by 7 per cent.

There were no changes on the podium: the port of Algeciras retained first place with 28.5 million tonnes (-1 per cent), followed by Cartagena, which recorded flows of 26 million tonnes (+0.3 per cent). Completing the triumvirate was Huelva, with traffic of 22.6 million tonnes (-5.3 per cent).

In percentage terms, the increase at Cádiz stands out, having doubled its liquid bulk flows to reach 1.1 million tonnes. This was due to bituminous products and biofuels, in addition to petroleum products.

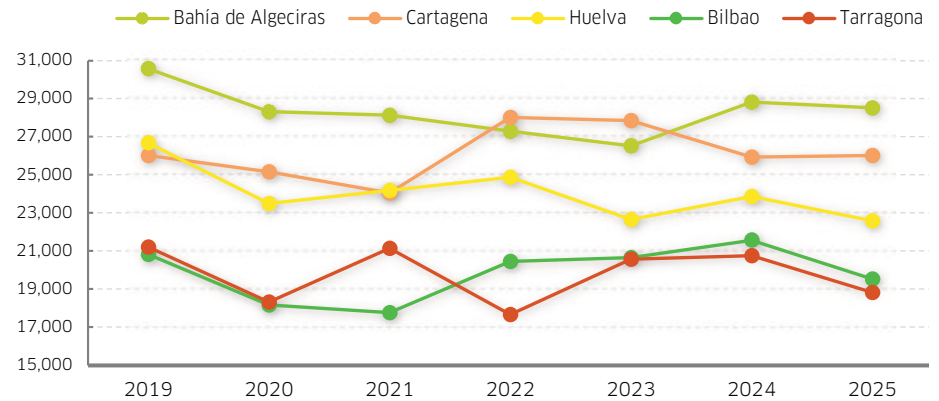
### NATURAL GAS TRAFFIC, IN LINE WITH CONSUMPTION

### OPERATORS INVEST

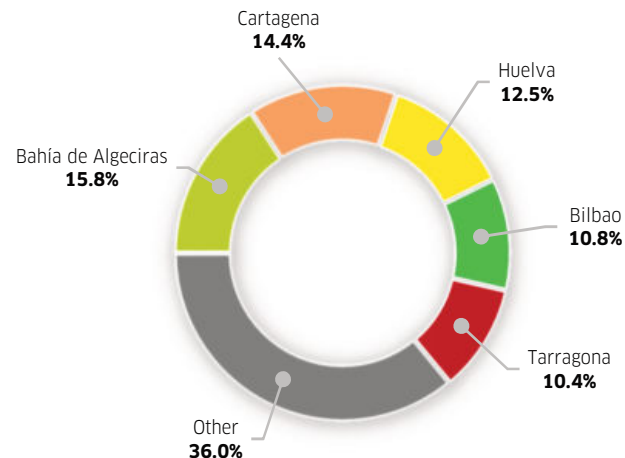
**Spanish ports will continue to gain liquid bulk capacity driven by the operators handling these flows. This is the case of the outer port of A Coruña, where Exolum is planning the construction of an energy transition terminal with an investment of more than €100 million. Another ambitious initiative is that of Repsol, which plans to invest up to €33.4 million in its concession for petroleum product traffic at the port of Tarragona. For its part, Sevitrade plans to allocate €10.3 million to the construction of new storage tanks for liquid bulk at its facilities in the port of Seville. Already a reality is the new multi-product pipeline at the port of Huelva, built by Moeve and Exolum with an investment of more than €150 million. Castellón is another of the port areas set to gain capacity in this type of traffic. The Port Authority will build a new pipe rack, which will support future pipelines.**

### PORTS IN A LIQUID STATE

The top five ports – Algeciras, Cartagena, Huelva, Bilbao and Tarragona – handled 115.4 million tonnes of liquid bulk, that is, they account for 64% of the total Spanish port system.



### YEAR 2025



Million tonnes. 2025, preliminary. Source: Puertos del Estado.



## Port Tarragona

HUB FOR THE OFFSHORE  
WIND INDUSTRY

2026. Balears Wharf 2nd phase.  
20 hectares

2027. Ponent breakwater.  
New annexed docks



Port Tarragona is positioned as a logistics hub for the construction and assembly of floating wind turbines in the western Mediterranean, thus contributing to the decarbonisation of the economy and society



**CATFLOWE**  
Catalan Floating Offshore Wind Energy



porttarragona.cat

TRAFFIC IN SPANISH PORTS | DRY BULK

# ANOTHER POOR HARVEST

DRY BULK REMAINED IN THE DOLDRUMS DUE TO THE PERFORMANCE OF COAL AND CEREALS

## WELL BELOW PRE-COVID LEVELS

Only four ports in the 'top 10' –Castellón, Cartagena, Barcelona and A Coruña– exceed their 2019 figures, prior to the global health crisis.

	2025	%25/24	%25/19	2024	2023
Gijón	12.6	+4%	-14%	12.1	16.1
Tarragona	8.5	-8%	-13%	9.2	10.2
Castellón	8.2	+6%	+15%	7.7	6.5
Cartagena	7.2	-18%	+6%	8.8	8.8
Huelva	5.4	+3%	-5%	5.3	5.7
Bilbao	4.4	+1%	-7%	4.3	3.9
Almería	4.3	+10%	-3%	3.9	3.9
Barcelona	4.1	-15%	+0%	4.8	4.8
A Coruña	3.8	-11%	+8%	4.2	5.2
Ferrol - San Cibrao	3.3	-10%	-59%	3.7	3.8
Santander	3.2	-5%	-13%	3.4	3.8
Avilés	2.9	+1%	+3%	2.8	2.8
Valencia	2.4	-12%	+11%	2.8	2.5
Sevilla	2.2	+8%	-4%	2.0	2.0
Cádiz	1.8	+9%	-3%	1.7	2.2
Alicante	1.4	-20%	-1%	1.8	1.8
Marín - Pontevedra	1.1	-20%	+23%	1.4	1.0
Málaga	1.1	-14%	-26%	1.3	1.4
Pasaia	1.0	+7%	-3%	0.9	1.1
Motril	0.9	+16%	+41%	0.8	0.7
Las Palmas	0.5	+12%	+2%	0.4	0.4
S.C. Tenerife	0.4	+24%	-1%	0.3	0.4
Vilagarcía	0.4	-7%	-20%	0.4	0.6
Baleares	0.3	-10%	-74%	0.4	0.4
Vigo	0.3	+20%	+5%	0.3	0.3
Algeciras	0.3	+15%	-72%	0.2	0.4
Rest	0.0	+12%	-27%	0.0	0.0
<b>TOTAL</b>	<b>81.9</b>	<b>-3%</b>	<b>-10%</b>	<b>84.8</b>	<b>90.5</b>

Million tonnes. 2025, preliminary. Source: Puertos del Estado.

Dry bulk once again brought up the rear, marking a third consecutive poor year. The Spanish port system channelled 81.9 million tonnes of dry bulk in 2025. These volumes represent a decline of 3.4 per cent compared with the previous year. These traffic flows would need to add almost nine million more tonnes to reach the 90.8 million recorded in 2019.

This trend continued to be driven by the fall in coal traffic, down 10.4 per cent to 8.9 million tonnes, due to national and European energy policy, which penalises this type of fuel. Even so, it remains the third-largest dry bulk commodity moving through the Spanish port system.

The usual decline in this mineral was compounded by the almost 20 per cent fall (18.4 per cent) in cereals and cereal flours, down to 15.14 million tonnes. In this case, the reason was the good harvest in Spanish fields, after years of drought, which reduced imports of this product.

Cereals have ceased to be the leading dry bulk commodity, yielding that position to other non-metallic minerals which, as last year, continued to per-

form well, thus contrasting with the overall trend. This type of product closed the year at 16 million tonnes, that is, 6.6 per cent more.

Last year also brought changes in third place on the podium. The port of Gijón remains the leader

## LESS IMPORTS DUE TO THE STRONG SPANISH AGRICULTURAL SEASON

with almost 12.6 million tonnes and growth of 4 per cent, compared with the 3.4 per cent decline for the segment as a whole. This increase was mainly due to iron ore and coal traffic at the EBHI terminal, which totalled 7.1 million tonnes and posted growth of 18.4 per cent up to October 2025, the latest data available at the close of this edition. This was achieved despite the decline in thermal coal traffic.

The port of Tarragona, in second place, also retained its position on the podium despite recording a fall of 8 per cent, to 8.5 million tonnes. In this case, the Catalan port area was

hit by cereal flows, whose imports fell by double digits.

The port of Castellón overtook Cartagena to move into third place. The Castellón port area closed the year with traffic of close to 8.2 million tonnes and growth of 6.3 per cent. With these volumes, "Port-Castelló reaffirms its fundamental role for the ceramics and agri-food sectors," the Port Authority said in a statement.

For its part, Cartagena slipped to fourth place in the ranking with 7.2 million tonnes and a decline of 17.8 per cent.

## A rain of millions

The poor overall performance being recorded by dry bulk is not discouraging investment in these traffic flows at Spanish docks.

One of the most ambitious projects already entering the countdown phase is the expansion of Elian's facilities under a new concession at the Álvarez de la Campa quay in the port of Barcelona, which means doubling the surface area to almost 100,000 square metres. Elian has recently begun construction of the new plant for the manufacture of higher value-added

**TMG**  
TERMINAL MARÍTIMA DEL GRAO

Nuevo Edificio Usuarios, 1  
Port of Castellón  
Tel.: +34 964 73 70 49  
Fax: +34 964 28 85 33  
12100 Castellón (Spain)

LOADING AND UNLOADING OF BULK, GENERAL MERCHANDISE AND RENEWABLE INDUSTRIES. SPECIALISED IN THE CERAMICS SECTOR

tmg@tmg.com.es  
www.tmg.com.es

soy protein, with an investment exceeding €200 million.

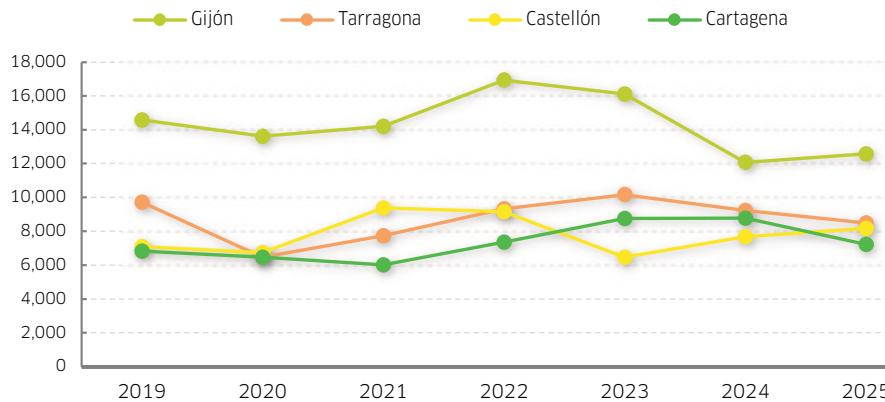
This project will in turn generate further investment, since the new concession where Elian will expand requires the relocation of the BIT coffee terminal (Barcelona International Terminal), a joint venture formed by the Spanish subsidiary of the Swiss group S.G.S. and local company Empresas Masiques, to a new site. The new facilities, representing an investment of around 30 million, will allow BIT, already the largest coffee terminal in southern Europe, to provide more value-added services while expanding its hinterland.

The other Catalan port of general interest, Tarragona, is also planning to grow in these traffic flows. Aralogic, a company belonging to Grupo Jorge, has secured a concession covering 8,602 square metres at the Aragón quay in the Catalan port area. The project, to be developed in phases, envisages total investment of €2.5 million.

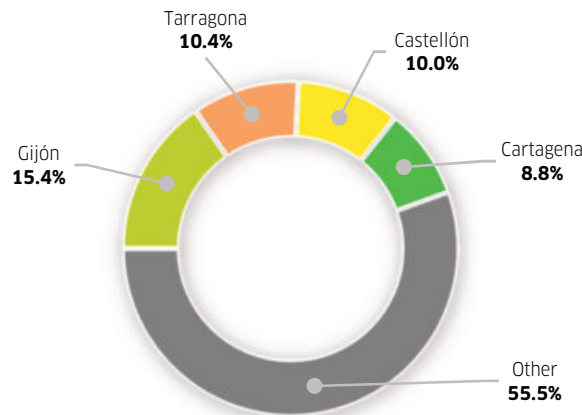
Meanwhile, the Port Authority of Cartagena recently awarded Bergé Marítima, which was already operating in the port area, two plots in the ex-

### APPROACHING 50%

The four leading ports –Gijón, Tarragona, Castellón and Cartagena– account for 4 out of every 10 tonnes of dry bulk moving through the Spanish port system, representing a 44.5% share.



### YEAR 2025



Million tonnes. 2025, preliminary. Source: Puertos del Estado.

pansion of the Escombreras basin. Bergé Marítima will use the new surface area for the handling and storage of dry bulk, mainly agri-food commodities. Earlier, Cartagena had awarded another plot, with a surface area of 15,700 square metres, to Ership for agri-food products.

In addition, Ership will strengthen Sagunto as a bulk port with a new terminal, which will prioritise mechanisation with an investment of €43 million, together with Intersagunto and Grupo Valls.

**THE FALL IN TRAFFIC IS NOT STOPPING PRIVATE INVESTMENT**



**Puerto de Gijón**

Autoridad Portuaria de Gijón

From Gijón to the world.  
Your link to customers and suppliers worldwide

A Globally connected port

[www.puertogijon.es](http://www.puertogijon.es)





The Port of Valencia leads Spain's general cargo segment.

## TRAFFIC IN SPANISH PORTS | GENERAL CARGO

# COOLING DOWN

## THE MARKET STABILISES AFTER THE RED SEA BOOST

The Spanish port system closed 2024 with a record result in general cargo traffic, driven by the Red Sea crisis and the diversion of shipping routes via the Cape of Good Hope. One year later, the 2025 data confirm that the boom was real, but also that its structural impact on the system is limited.

In 2025, general cargo reached 278.8 million tonnes, barely 0.1 per cent more than in 2024. Volumes remain at peak levels, but the pace is cooling, and the sector is thus entering a phase of stabilisation marked by traffic-flow readjustments, the loss of temporary traffic and growing geopolitical and

trade uncertainty. "2024 was an exceptional year; 2025 is the year of the shake-out," sums up an executive at a shipping line with a strong presence in the Mediterranean.

After having been the main driver of the rebound in 2024, containers are beginning to show signs of fatigue in 2025, especially at the hubs. Ports such as Valencia, Barcelona and Algeciras closed the year in negative territory in general cargo, reflecting the partial withdrawal of diverted traffic and the reorganisation of services by shipping alliances.

"The diversion via the Red Sea has not disappeared, but it no longer

concentrates extraordinary volumes at a single point. Shipping lines have diversified calls and adjusted capacity," explains a shipping agent.

By contrast, more regional ports are managing to capture activity. Facilities such as Las Palmas, Málaga, Tarragona, Vilagarcía and Ferrol-San Cibrao posted strong growth, supported by opportunity traffic, short sea shipping and greater operational flexibility.

The 2025 financial year thus became more a story of redistribution than of pure growth, with flows being reallocated according to costs, reliability and transit times.

### Continuity

In this context, conventional cargo once again demonstrated its stabilising role. Without the dynamism of containers, but with greater regularity, it sustains employment and activity in a scenario of lower visibility. "It does not make headlines, but it brings continuity to the system," notes an executive at a stevedoring company.

The sector agrees that future performance will depend on the evolution of the conflict in the Middle East and the definitive use of the Suez Canal, as well as on the stability of ocean freight rates and the competitiveness of Spanish export industry.

**THE USE OF THE SUEZ CANAL WILL BE KEY TO THE EVOLUTION OF CARGO VOLUMES AT SPANISH PORTS IN 2026**

### VALENCIA AND ALGECIRAS, LEADING THE WAY

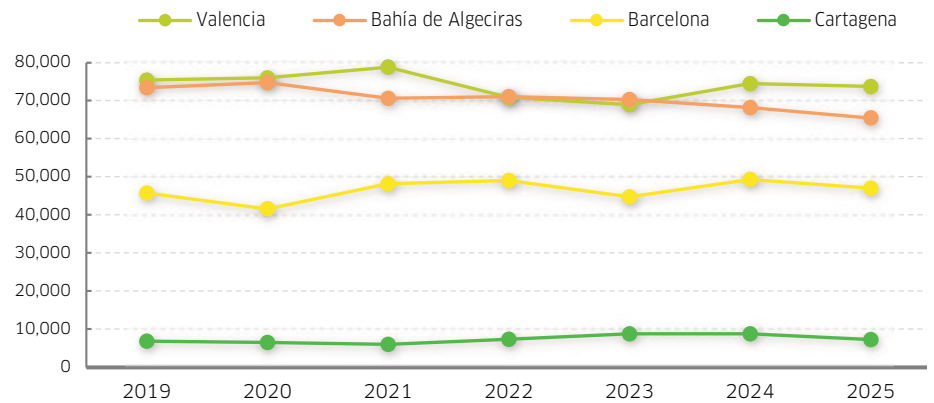
The terminals at the ports of Valencia and Algeciras, which account for 50% of national general cargo traffic, reduced their flows in 2025.

	2025	%25/24	%25/19	2024	2023
Valencia	73.7	-1%	-2%	74.5	69.0
Algeciras	65.4	-4%	-11%	68.1	70.3
Barcelona	47.0	-5%	+3%	49.3	44.7
Las Palmas	22.6	+15%	+44%	19.7	18.3
Baleares	15.6	+4%	+13%	14.9	14.2
S.C. Tenerife	9.9	+10%	+38%	9.1	8.3
Bilbao	8.2	-4%	-18%	8.6	8.2
Vigo	5.1	+0%	+32%	5.1	4.3
Málaga	4.3	+42%	+124%	3.1	1.0
Santander	3.7	+2%	+45%	3.7	2.9
Cádiz	2.4	+0%	+110%	2.4	2.1
Pasaia	2.4	-2%	+10%	2.4	2.4
Tarragona	1.9	+15%	+9%	1.7	1.7
Huelva	1.8	+5%	+59%	1.7	1.5
Gijón	1.7	-5%	-9%	1.8	1.6
Sevilla	1.7	+2%	-6%	1.6	1.5
Almería	1.7	+12%	+53%	1.5	1.3
Alicante	1.4	+13%	-2%	1.2	1.3
Castellón	1.2	-1%	-59%	1.3	1.1
Marín - Pontevedra	1.2	+0%	-24%	1.2	1.1
Avilés	1.2	+0%	-26%	1.2	1.1
Cartagena	0.9	-9%	-27%	1.0	0.9
Ferrol - San Cibrao	0.9	+33%	+17%	0.7	1.0
Vilagarcía	0.8	+17%	+27%	0.7	0.7
Ceuta	0.6	+4%	-26%	0.6	0.5
Motril	0.5	-9%	-35%	0.6	0.5
A Coruña	0.5	-14%	-54%	0.5	0.6
Melilla	0.5	+2%	-40%	0.5	0.5
<b>TOTAL</b>	<b>278.8</b>	<b>+0%</b>	<b>+2%</b>	<b>278.5</b>	<b>262.5</b>

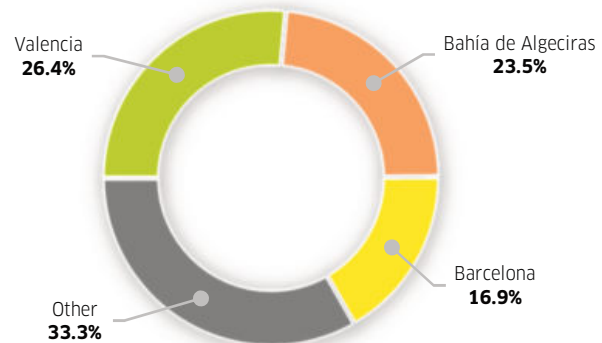
Million tonnes. 2025, preliminary Source: Puertos del Estado.

### A YEAR OF STABILITY FOR GENERAL CARGO VOLUMES

Containers began to show signs of fatigue in the second half of 2025, while conventional cargo once again demonstrated its stabilising role in the port system, with Valencia, Algeciras and Barcelona as the leaders.



### YEAR 2025



Million tonnes. 2025, preliminary Source: Puertos del Estado.



**PROVIDING THE MOST EFFICIENT LOGISTICS SOLUTIONS.**

- > Maritime and Port Logistics
- > Rail Logistics
- > Ships Agency
- > Chartering
- > Customs and Forwarding
- > Logistics Outsourcing



**ALGEPOSA**

Your integral logistics operator.

Spain /France/ Oman

TRAFFIC IN SPANISH PORTS | CONTAINERS

# ON ROUTE TO NORMALITY

## CONSOLIDATING GROWTH AFTER THE GEOPOLITICAL SHOCK

Containers are beginning to leave behind the period of upheaval and enter a phase of complex normalisation, shaped by the legacy of the Red Sea crisis and by a new balance of forces in the Mediterranean. If 2024 was the year of impact and accelerated growth, 2025 has been the year of digestion, with figures confirming the change of cycle and requiring a more strategic reading.

“The Red Sea crisis was not a miracle, it was an accelerator,” explains an executive at a shipping line with interests in several Spanish ports, consulted by Transporte XXI. “In 2024 we occupied available space and captured diverted traffic. In 2025 we learned which part of that growth was temporary and which part can be consolidated.”

2025 closed with 18.6 million TEU in the Spanish port network, a record high after adding around half a million more TEU, which represented growth of 2.7 per cent, far from the 10 per cent recorded in 2024. It is still a figure driven by the diversion of vessels around southern Africa, the closure of Suez and the need for shipping lines to reorganise rotations and port calls in record time.

### Adaptation

During 2024, international tension disrupted traffic as rarely before. Route changes, improvised calls and disruptions to production rhythms put terminals, stevedores and logistics operators to the test. The supply chain once again demonstrated its capacity to adapt, but it also exposed structural limitations.

In 2025, the scenario changed. With announcements of the gradual re-opening of the Suez route, flows are beginning to fall back into place and ports will now compete in a less exceptional environment. “The passage towards normality does not mean returning to the starting point,” sector sources explain. “It means accepting that some traffic will return to the eastern Mediterranean, while other volumes will stay if we are competitive.”


Ports such as Barcelona, Valencia, Las Palmas and Málaga benefited from vessel diversions over the past two years, thanks to available capacity and operational flexibility. In 2025, these enclaves worked to retain part of those volumes. Even so, shipping lines and freight forwarders

## IN THE SHADOW OF THE SHIPPING LINES' HELM

Spanish ports maintained positive performance in container traffic, still driven by shipping route diversions via the Cape of Good Hope and by the growth of short-distance services.

	2025	%25/24	%25/19	2024	2023
Valencia	5,663	+3%	+4%	5,476	4,797
Algeciras	4,738	+1%	-8%	4,713	4,734
Barcelona	3,727	-4%	+12%	3,886	3,280
Las Palmas	1,543	+16%	+53%	1,330	1,205
S.C. Tenerife	543	+7%	+32%	509	497
Bilbao	424	-8%	-33%	459	492
Málaga	355	+64%	+70%	217	41
Vigo	309	+4%	+43%	298	227
Cádiz	212	-5%	+266%	222	200
Alicante	193	+7%	+13%	181	172
Santander	161	+8%	>999%	150	57
Sevilla	157	+3%	+15%	152	143
Huelva	149	+39%	+102%	107	89
Castellón	99	+14%	-51%	87	72
Baleares	85	+0%	-30%	84	91
Gijón	69	-2%	-9%	70	65
Marín - Pontevedra	43	-11%	-44%	48	45
Vilagarcía	39	+19%	-5%	33	29
Cartagena	39	-28%	-42%	54	51
Ferrol - San Cibrao	23	+59%	+173%	14	25
Almería	20	+15%	-17%	17	17
Tarragona	16	+8%	-68%	14	34
Ceuta	6	+11%	-47%	5	5
Melilla	4	-22%	-75%	6	6
Motril	0	-59%	-71%	0	1
A Coruña	0	-79%	+17%	0	0
Rest	0	-	-50%	-	-
<b>TOTAL</b>	<b>18,616</b>	<b>+3%</b>	<b>+6%</b>	<b>18,132</b>	<b>16,375</b>

Thousand TEU. 2025, preliminary. Source: Puertos del Estado.



**Port of Málaga**  
Málaga Port Authority

**Port of Málaga,  
connected to the world.**

Your **boutique** port to connect  
anywhere in the world.

▼


With all necessary **#services**.

▼


**#Sustainable** port.

▼

Applying **#innovation** to processes.

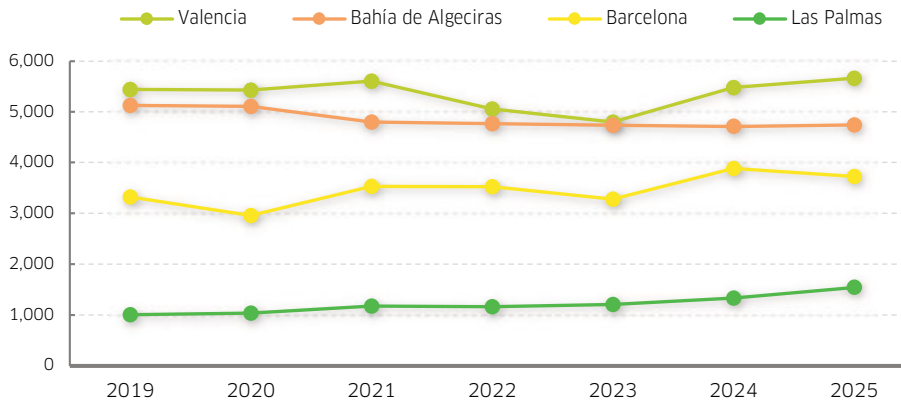


#PuertodeMálaga | X @ in y f | puertomalaga.com



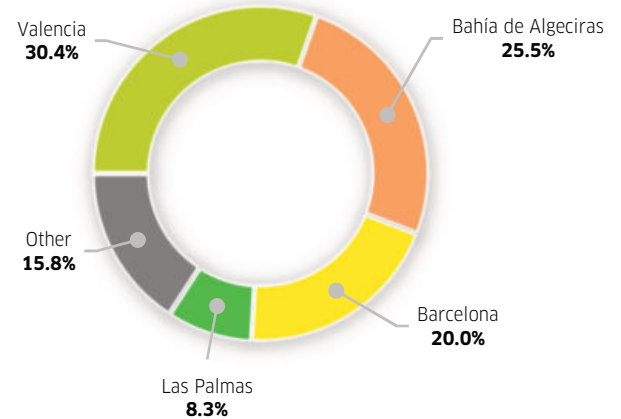
### 74% OF CONTAINERS IN SPAIN ARE CONCENTRATED IN FOUR PORTS

The terminals located in Valencia, Algeciras, Barcelona and Las Palmas handled a total of 15.6 million TEU in 2025.



Thousand TEU. 2025, preliminary. Source: Puertos del Estado.

YEAR 2025



agree on the diagnosis: growth will depend on physical and operational capacity. “If we want to attract new services and mega-ships, we need more berths and more terminal space,” they warn.

### LOOKING TO THE OPPOSITE SHORE: THE RISE OF TANGIER MED

The comparison with Tangier Med remains inevitable. The Moroccan enclave closed 2025 above 11 million TEU, after growing by around 15 per cent, supported by the strengthening of operations by major shipping alliances and by the growth of local cargo, as a result of industrial and logistics relocation in Morocco. “Spain is no longer competing only for transshipment; it is competing for investment, for industry and for space,” sector sources point out. In this context, Algeciras maintained flows while awaiting the expansion of TTI Algeciras at Isla Verde Exterior.



## Port of Huelva

### YOUR TRUSTED PARTNER FOR GLOBAL LOGISTICS CHAINS










**CLIENT ORIENTED**



**MULTIMODAL**



**SUSTAINABLE**



**SMART**



[www.puertohuelva.com](http://www.puertohuelva.com)

TRAFFIC IN SPANISH PORTS | CONTAINERS

# CONSOLIDATION

## SPAIN STRENGTHENS ITS POSITION AS AN IMPORT-EXPORT PLATFORM

The 2025 financial year served to consolidate the recovery of import and export container traffic at Spanish ports, leaving behind the temporary nature that marked the previous year. After the strong rebound in 2024, terminals entered a phase of more orderly growth, sustained by Spain's role as a logistics platform for European and Mediterranean foreign trade. "In 2024 we spoke of recovery; in 2025 we are already talking about normalisation on a sounder footing," explains a logistics operator consulted by Transporte XXI. "Route diversions are still having an influence, but what now carries more weight is the ability of Spanish ports to capture and retain import-export traffic on a structural basis."

Local cargo continues on a path of moderate growth, after the strong advance of the previous year, consoli-

dating a volume slightly above 6.3 million TEU, the threshold regained in 2024 and not reached since before the pandemic.

Freight forwarders stress that Barcelona and Valencia continue to be the two main pillars of the system. "In 2024 they were key to absorbing growth; in 2025 they have managed to stabilise it," they point out. Both enclaves continue to post good import-export performance, although with somewhat more contained rates, reflecting a market entering a phase of maturity.

At the same time, Algeciras continues to adjust its traffic mix, with a more selective performance in local cargo. "The major adjustment took place in 2024; in 2025 the port is reordering flows and reinforcing its strategic position," sources at the enclave note.

Import-export growth continues to be supported

**VALENCIA, WITH 2.9 MILLION TEU, CONSOLIDATES ITS POSITION AT THE HEAD OF IMPORT-EXPORT TRAFFIC IN THE PORT SYSTEM**

## GROWTH IN VOLUMES

Spanish ports gained 8% in import-export flows, led by the strong momentum of business at the docks of Valencia.

	2025	%25/24	%25/19	2024	2023
Valencia	2,911	+15%	+27%	2,521	2,237
Barcelona	1,994	+3%	+18%	1,931	1,731
Algeciras	653	+2%	-8%	640	777
Bilbao	400	-7%	-28%	430	454
Vigo	267	+6%	+70%	253	195
Santander	106	+8%	+643%	98	37
Las Palmas	86	+10%	+2%	79	76
Castellón	81	+7%	-58%	76	64
S.C. Tenerife	64	+21%	+60%	53	46
Gijón	58	-6%	+5%	62	57
Málaga	40	+97%	+59%	20	19
Marín - Pontevedra	36	-16%	-46%	42	41
Cartagena	33	-18%	-39%	40	38
Alicante	31	-6%	+60%	33	23
Huelva	31	+152%	+112%	12	12
Cádiz	27	-19%	+177%	33	30
Tarragona	15	+11%	-61%	14	24
Almería	15	+15%	-29%	13	9
Ferrol - San Cibrao	10	-17%	+19%	11	19
Vilagarcía	7	+13%	+378%	6	3
Sevilla	2	+39%	-43%	2	1
Motril	0	-59%	-71%	0	1
Ceuta	0	-20%	-94%	0	0
Baleares	0	+45%	-23%	0	0
A Coruña	0	-79%	+17%	0	0
Other	0	-98%	-100%	0	0
<b>TOTAL</b>	<b>6,869</b>	<b>+8%</b>	<b>+13%</b>	<b>6,371</b>	<b>5,895</b>

Thousand TEU. 2025, preliminary. Source: Puertos del Estado.

**APM TERMINALS**  
Lifting Global Trade

Lifting standards of efficiency & reliability

Learn more on [apmterminals.com](https://apmterminals.com)

by sectors such as agri-food, ceramics, chemicals, textiles, industrial components and intermediate goods, which maintain high logistics turnover. Unlike 2024, when the momentum was closely linked to the Red Sea crisis, in 2025 traffic also reflects strategic sourcing decisions and market diversification.

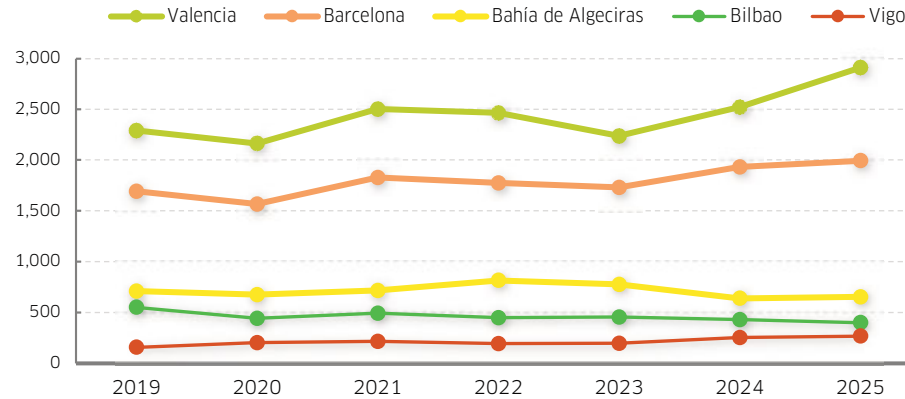
**Reordering**

“The increase in transit times and international uncertainty have changed the way of operating,” explains an executive at a European shipping line. “Companies are still reinforcing stocks and that benefits ports such as Valencia and Barcelona.”

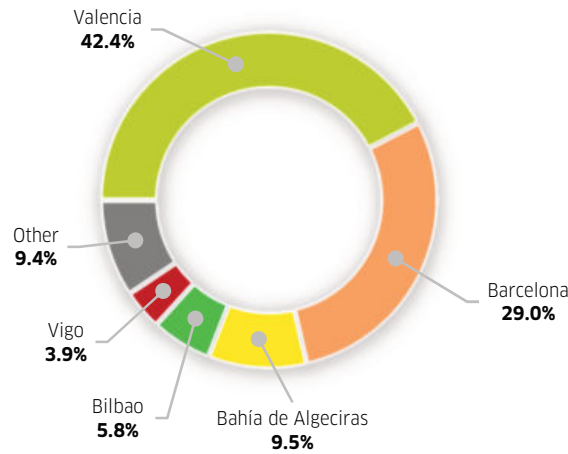
Spain continues to benefit from the good performance of economies such as the United States, Brazil, Turkey, Italy and Asian markets, which are maintaining or increasing their purchases of Spanish products. At the same time, import flows have been reordered, with the major mainland hubs gaining weight over other Mediterranean enclaves.

**VALENCIA AND BARCELONA, GATEWAYS FOR FOREIGN TRADE**

These two Mediterranean ports account for 70 out of every 100 import-export containers handled in Spain.



**YEAR 2025**



Thousand TEU. 2025, preliminary. Source: Puertos del Estado.

**SPAIN, A MATURE ASSET**

The international backdrop continues to be shaped by geopolitical and trade instability. Sector sources warn that “the competitiveness of exports will be key to sustaining growth”, in a context in which the threat of new tariffs, especially from the United States, is introducing uncertainty into some industrial supply chains. “It is still too early to talk about relocations, but companies are analysing different scenarios,” logistics sources acknowledge. In this context, all indications suggest that shipping lines will strengthen their operations at ports such as Barcelona and Valencia throughout 2026, provided freight rates remain at stable levels, generating a spillover effect on local cargo, while the reopening of Suez takes shape. In that scenario, Spain maintains a privileged strategic position, with a highly mature local cargo asset of around 3 million TEU per year in full export containers.

**PÉREZ TORRES MARÍTIMA**  
www.ptmar.com

PORT OPERATORS – SHIPPING AGENTS  
FREIGHT FORWARDERS – CUSTOMS BROKERS – WAREHOUSING  
PROJECT CARGO – HEAVY & SPECIAL TRANSPORT  
CHARTERING – SEA FASTENING

SINCE 1962

TRAFFIC IN SPANISH PORTS | CONTAINERS

# FROM REBOUND TO ADJUSTMENT

TRANSHIPMENT MODERATED ITS GROWTH IN 2025 AFTER THE EXTRAORDINARY RED SEA EFFECT

## A YEAR OF STABILITY IN TRANSHIPMENT

Spanish ports reduced their volumes by 1%, in a year in which diversions to smaller enclaves were observed thanks to their spare capacity.

	2025	%25/24	%25/19	2024	2023
Algeciras	4,085	+0%	-8%	4,073	3,956
Valencia	2,552	-7%	-13%	2,756	2,348
Barcelona	1,513	-13%	+8%	1,739	1,318
Las Palmas	939	+26%	+110%	742	631
Málaga	306	+63%	+79%	187	12
S.C. Tenerife	79	+19%	+529%	66	74
Santander	31	+15%	>999%	27	3
Huelva	30	+134%	>999%	13	5
Vigo	26	-17%	+184%	32	15
Cádiz	22	-4%	>999%	23	18
Castellón	10	+151%	+25%	4	2
Ferrol - San Cibrao	9	>999%	-	1	0
Bilbao	8	+5%	+334%	7	5
Alicante	3	-3%	+407%	3	2
Vilagarcía	1	+675%	>999%	0	0
Cartagena	1	+15%	+518%	1	0
Marín - Pontevedra	0	-19%	-95%	0	1
Cijón	0	-10%	>999%	0	1
Other	0	-60%	+27%	1	2
<b>TOTAL</b>	<b>9,614</b>	<b>-1%</b>	<b>+2%</b>	<b>9,674</b>	<b>8,393</b>

Thousand TEU. 2025, preliminary. Source: Puertos del Estado.

After the sharp rebound recorded in 2024, driven by the massive diversion of vessels as a result of the Red Sea crisis, the year-end 2025 figures confirm that container transshipment traffic has entered a phase of normalisation, with a slight overall decline that does not, however, erase the structural change experienced at Spanish docks.

2024 marked a temporary return to volumes similar to those of 2021, recovering traffic that had shifted to other Mediterranean hubs in the previous two years. Shipping lines, forced to avoid the Suez Canal, strengthened calls in Spain, and that movement left a deep mark on port activity. But in 2025, with routes more stabilised and operational adjustments made by shipowners, the system moved from accelerated growth to a scenario of restraint.

“What we experienced in 2024 was an extraordi-

nary phenomenon, not a new normal,” acknowledges an executive at a freight forwarding company with strong Asian import flows. “That year, costs were optimised thanks to the arrival of large vessels and a highly favourable concentration of volumes, but in 2025 the market once again fine-tuned prices and frequencies, and that is reflected in the figures.”

The arrival of almost 1.3 million additional TEU in 2024 had a direct impact on port employment. The increase in shifts made it possible to rebuild income after two years of irregular activity. In 2025, however,

that momentum eased, with flows holding broadly steady, albeit with a 1 per cent decline.

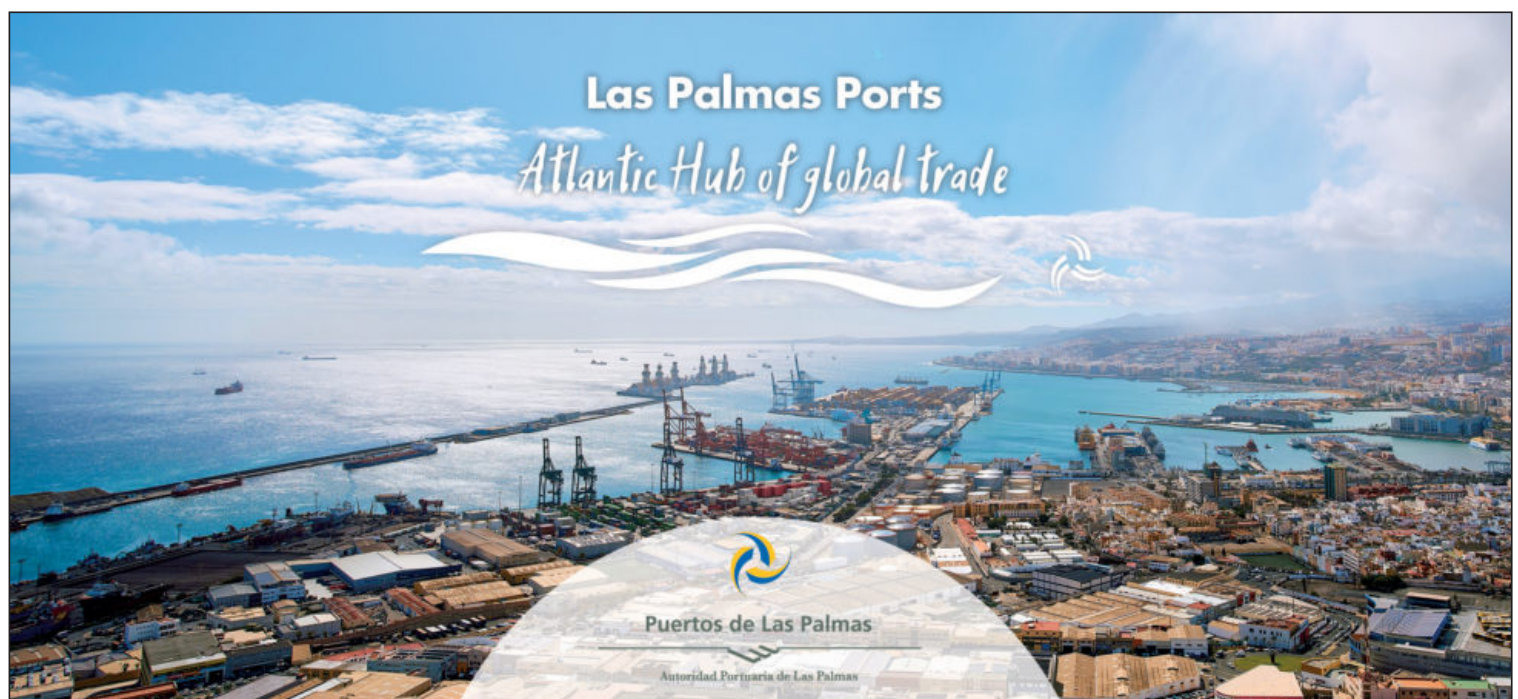
“We knew it was a parenthesis,” admit sources from the stevedoring sector. “The risk now is to think that that level of activity was guaranteed. If traffic is not secured, we could return to an adjustment scenario like that of 2022 and 2023.”

### Trends

In the distribution of traffic, 2025 consolidates some of the trends already visible the previous year. Barcelona and Valencia reduced their shares of transshipment traffic, with significant declines, “also driven by the impact of the ETS,” sector sources indicate, thus leading in idle capacity for import-export traffic.

At the opposite end, Algeciras continues to show limited growth. The port is waiting to gain room to capture new volumes.

## ACTIVITY FALLS AT THE HUBS AND GROWS AT ENCLAVES WITH SPARE CAPACITY



# THE CANARY ISLANDS REGULATE DOMESTIC CABOTAGE

THE PORT NETWORK EXCEEDED 2.13 MILLION TEU IN 2025

Container traffic between Spanish ports closed 2025 with a further increase, confirming that cabotage has become one of the most stable pillars of the national port system. The Spanish network exceeded 2.13 million TEU, representing growth of 2.2 per cent, in a year marked by the recovery in consumption, the strength of tourism and the growing role of the islands as a logistics destination and origin.

In this context, the Canary Islands once again stood at the centre of the national maritime map. Tourist activity, sustained throughout the year, generated constant demand for supplies, while major retail chains intensified their purchases on the mainland to serve an increasingly dynamic island market. This continuous flow of goods has reinforced domestic routes and given stability to regular services.

“The Canary Islands act as a genuine regulator of cabotage,”

sector sources point out, highlighting how the performance of tourism and domestic consumption translates almost immediately into higher seaborne volumes. Added to this is the solid performance of traditional sectors such as Canary bananas and tomatoes, which continue to generate regular and predictable traffic.

### Island supply

A significant part of these flows is also channelled through ro-ro cargo, which means that Canary Islands traffic also depends on the services of shipping lines such as Armas, Fred. Olsen and Baleària, especially in accompanied and unaccompanied freight, which is key to island supply.

In the container segment, leadership lies with Spanish companies that have made cabotage their speciality. Boluda Lines, JSV, Alisios and Nisa Marítima continue to dominate this market,

## ANOTHER POSITIVE YEAR FOR CABOTAGE

Traffic between Spanish ports grew by 2% in 2025, with volumes above 2 million TEU, in line with previous years.

	2025	%25/24	%25/19	2024	2023
Las Palmas	518	+2%	+9%	509	498
S.C. Tenerife	400	+3%	+12%	390	377
Barcelona	220	+2%	-6%	216	231
Valencia	200	+0%	-6%	199	212
Cádiz	163	-2%	+244%	165	152
Alicante	160	+10%	+6%	145	147
Sevilla	154	+2%	+16%	151	142
Huelva	88	+8%	+49%	82	71
Baleares	85	+0%	-30%	84	91
Vilagarcía	31	+16%	-23%	26	26
Santander	24	-3%	-	25	18
Bilbao	17	-22%	-78%	21	34
Vigo	15	+16%	+6%	13	16
Gijón	10	+35%	-49%	7	7
Málaga	9	+6%	-30%	9	10
Castellón	9	+18%	+174%	7	6
Marín - Pontevedra	7	+18%	+20%	6	3
Ceuta	6	+12%	-32%	5	5
Cartagena	5	-61%	-62%	13	13
Almería	5	+14%	+80%	4	7
Melilla	4	-21%	-69%	6	6
Ferrol - San Cibrao	4	+74%	>999%	2	6
Other	-	-100%	-100%	0	8
<b>TOTAL</b>	<b>2,134</b>	<b>+2%</b>	<b>+6%</b>	<b>2,087</b>	<b>2,086</b>

Thousand TEU. 2025, preliminary. Source: Puertos del Estado.

alongside international shipping lines operating both with the Canary Islands and between mainland ports.

THE CANARY ISLANDS ACCOUNT FOR 43% OF THE CABOTAGE LINER MARKET IN SPAIN



**GLOBAL LOGISTIC**  
Algeciras Port

**EXPANDED FACILITIES**

[glogistic.es](http://glogistic.es)





**GLOBAL LOGISTIC**  
YOUR PARTNER  
in the Port of Algeciras

DOUBLE GIRDER GANTRY CRANE 60TN • BREAK BULK CARGO • PROJECT CARGO • INTERMODAL • CROSS DOCKING • SPECIAL LOADS • CARGO LASHING • CUSTOMS WAREHOUSE - STORAGE • OVERSIZE AND HEAVY ITEMS • CROSS DOCKING • CUSTOMS INSPECTIONS • SOIVRE

TRAFFIC IN SPANISH PORTS | CONTAINERS

# GAINING COMMERCIAL STABILITY

THE NORMALISATION OF ROUTES IS READJUSTING TRANSIT TRAFFIC AND TERMINALS ARE CAPTURING MORE ADDED VALUE

The 2025 financial year closed for container traffic at Spanish ports as a year of adjustment, less brilliant in absolute figures, but more revealing in terms of the system's structure and maturity. After several years shaped by exceptional circumstances—the pandemic, global congestion and forced diversions via the Cape of Good Hope—containers ceased to grow by inertia and forced the docks to operate in a more realistic environment, marked by the normalisation of routes and a more balanced redistribution of flows.

"2025 has not been a bad year, it has been a landing year," sums up a logistics operator with a strong presence in the Mediterranean. The sector's widespread perception is that the Spanish port system has reduced part of its dependence on pure container transit traffic, especially opportunistic transshipment, and has strengthened its muscle in import and export traffic, which is more stable, less volatile and brings greater added value to the economy.

## Control of operations

During 2025, Spain's major ports operated in an environment of less opera-

tional exuberance. The "pull effect" of the Suez diversions, which in 2024 had triggered calls and volumes, gradually faded. Routes began to rationalise, services were adjusted and shipping lines regained part of the control over their networks. "The easy traffic is over; now every container counts and every call has to be justified," notes the head of a port operator.

Valencia, Barcelona and Algeciras approached 2025 with differentiated strategies, but with one common denominator: strengthening local cargo. In Valencia, import-export growth cushioned the loss of certain transshipment flows, consolidating its role as an industrial and logistics port serving more than one third of Spanish exports. In Barcelona, the focus shifted towards higher value-added services and better intermodal integration. In Algeciras, the transshipment adjustment was partially offset by greater stability in the chains linked to the Strait and the Andalusian hinterland. "Transit traffic comes and goes; the real cargo is what enters and leaves the country," stresses a freight forwarder.

The change has neither been immediate nor uniform. Some operators ac-



Ports have improved their import-export flows beyond the positive connectivity offered by international transit traffic.

knowledge that the year was marked by uneven months and a high degree of uncertainty in planning. "It has been a very tactical year, reading the market almost week by week," explains an executive at a shipping line calling at several Spanish ports. Tariff tensions, geopolitical noise and Donald Trump's actions from the White House added volatility to an already demanding system.

Even so, the sector's overall assessment is moderately positive. Spanish foreign trade maintained a reasonable tone, especially in exports, and made it possible to sustain volumes in a weaker international context. "We have not grown as in exceptional years, but neither have we lost our base. That is key," says a rail operator specialising in port traffic.

"Spain has shown resilience, but it cannot afford to settle," warns the head of a major terminal. "If Suez returns strongly and maritime capacity is re-

**INTEGRATED LEGAL SERVICES**

360°  
LEGAL SERVICES

Aiyon

LAWYERS

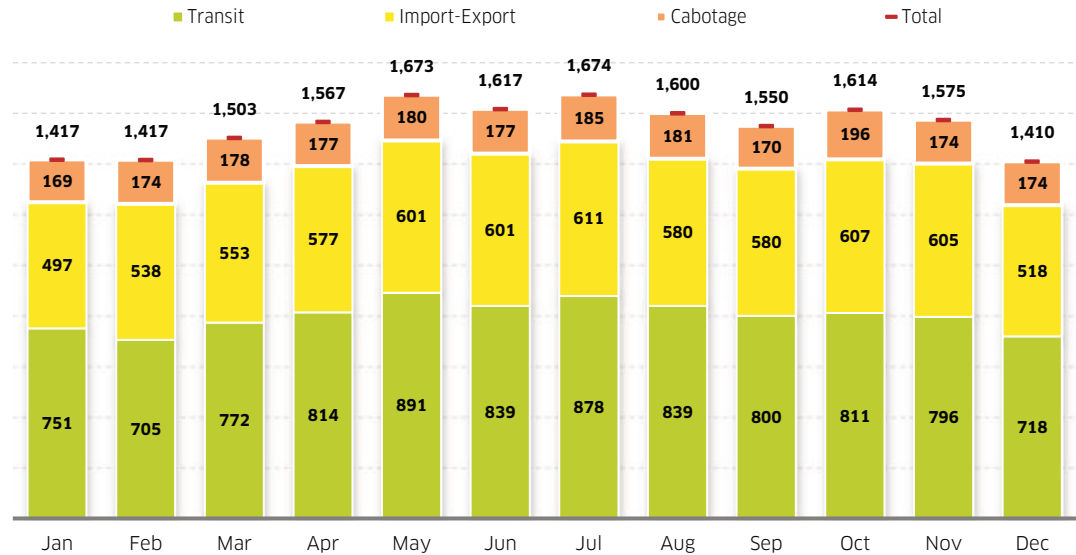
A professional team of lawyers,  
customized treatment  
and immediate response.

MADRID · CÁDIZ · BILBAO · ALGECIRAS  
24/7 TF. +34 628 656 395  
WWW.AIYON.ES



**JULY WAS THE MONTH WITH THE HIGHEST CONTAINER FLOWS IN 2025**

Import-export flows only stood out during the period from May to July, with monthly figures above 600,000 TEU, in line with international transit traffic, which continues to sustain the notable maritime connectivity of Spanish docks.



Thousands of TEU, year 2025. Source: Puertos del Estado. Prepared by Transporte XXI.

leased, the bottleneck will be on land. And there, either you are efficient or you are out of the picture.”

Looking ahead to 2026, the sector views 2025 as a bridging year. A year less dependent on temporary transit traffic and more supported by the real economy. Last year did not produce major headlines, but it did leave a sense of greater structural strength. “We have exchanged volume for quality,” concludes a freight forwarder with decades of experience. “And that, in an unstable world, is good news.”

**PORTS WILL TEND TO DEPEND ON THE REAL ECONOMY IN 2026**

**ContainerMaster+**  
Your ultimate solution for container transport.

Built for durability and designed for stability, it delivers outstanding performance during loading and unloading thanks to its extra-large tread blocks and wide, flat platform.

And with ContiConnect, you'll stay in control by monitoring performance.

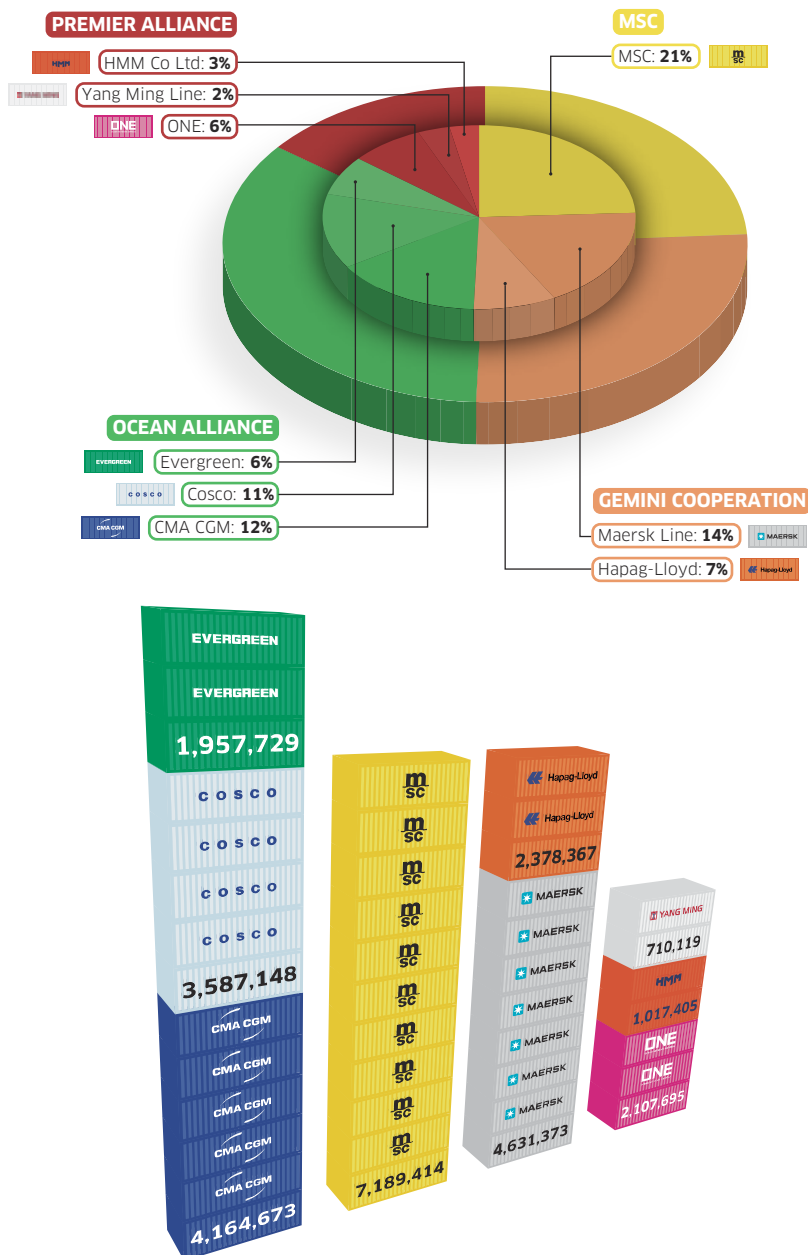
THE CONTAINER BUSINESS | SHIPPING ALLIANCES

# STRENGTHENING TO ACHIEVE BALANCE

MSC'S INDEPENDENT LEADERSHIP, THE RETURN OF THE 'GEMINI' ALLIANCE TO SUEZ AND THE GREATER WEIGHT OF THE 'OCEAN ALLIANCE' ARE REDEFINING A SCENARIO SHAPED BY VOLATILE FREIGHT RATES AND GEOPOLITICAL TENSION

## A STRONGER STRUCTURE IN THE FACE OF THE GEOPOLITICAL CONTEXT

Swiss shipping line MSC is consolidating its commitment to operating alone on global routes, in the face of competition from two major alliances: Gemini (Maersk and Hapag-Lloyd) and the Ocean Alliance (CMA CGM, Cosco, Evergreen and OOCL).



The shipping business entered a new era in February 2025. The major carriers embarked on a different course from the one that had defined global maritime logistics over the past decade: the break-up of alliances, the reorganisation of services and an increasingly concentrated market. One year later, in 2026, that transition is no longer only strategic, but also operational. The partial return to Suez, European regulatory pressure and the consolidation of Mediterranean Shipping Company (MSC) as an independent player are shaping a new global balance.

The commercial battle anticipated in 2025 between the alliance formed by Maersk and Hapag-Lloyd, known as Gemini Cooperation, and the Ocean Alliance, alongside MSC's independent solution, has now entered a decisive phase. In 2026, Maersk and Hapag-Lloyd took a first step towards the partial normalisation of the Asia-Europe corridor by beginning to resume transits through the Red Sea and the Suez Canal on part of their network, under naval escort.

This move marks a significant change after months of diversions around the Cape of Good Hope, a longer and more costly alternative that has strained the system's effec-

tive capacity and increased fuel consumption. The gradual reopening of Suez remains dependent on a still fragile geopolitical environment. The risks in the Middle East, insecurity in the Red Sea and the Strait of Hormuz, and the need for military escort underline that normalisation is neither immediate nor complete, but partial and conditional.

Gemini Cooperation, launched on 1 February 2025, integrates a network of 29 mainline services and another 29 shuttle services, with combined capacity of more than 3.4 million TEU, around 11 per cent of the global market.

At the same time, MSC has consolidated in 2026 its leadership as the world's leading operator, pursuing a strategy based on independence from the major alliances. According to Alphaliner, MSC reached capacity of 7.2 million TEU at the start of 2026, accounting for 21.3 per cent of

the world market, with an advantage of more than 2.5 million TEU over Maersk. The shipping line is already operating 979 vessels and is on the verge of surpassing one thousand, backed by an orderbook of more than 2 million TEU, close to 29 per cent of its current capacity.

While MSC is consolidating itself as an independent player and Gemini is seek-

**7.2**  
MILLION TEU  
CONTROLLED  
BY MSC,  
21.3% OF  
GLOBAL  
CAPACITY

Data in TEU. All percentages refer to the total global capacity of 33,798,299 TEU. Source: Alphaliner. Data as of 4/02/2026.

ing reliability in a corridor that remains unstable, the Ocean Alliance has strengthened its position as the sector's largest operational network. CMA CGM, Cosco Shipping, Evergreen and OOCL renewed the design of their network for 2026, coinciding with the alliance's tenth anniversary. The consortium deploys 41 regular services with total capacity of 5.3 million TEU, supported by a fleet of 394 vessels, of which 130 are operated by CMA CGM.

**Volatility**

The maritime business is moving into 2026 far removed from the extreme volatility of the post-pandemic period, but still trapped in a fragile balance between growing demand, constrained capacity and recurring geopolitical disruptions. The rebound in freight rates in the final quarter of 2025 reflected this new scenario: the Shanghai Containerized Freight Index accumulated an increase of close to 40 per cent from the summer lows, driven by persistent congestion at the major European ports, prolonged diversions around Africa and a rise in Asian demand.

Although the global fleet is growing at a rate close to 7 per cent year on year, effective capacity remains cut by around 15 per cent due to longer sailing times and port bottlenecks. In addition, 2026 has seen the full entry into force of the European ETS system for maritime traffic to and from European Union ports. Shipping lines will have to cover 100 per cent of their emissions, which will translate into significant cost increases in environmental surcharges and add pressure to freight rates.

A return to normality via Suez, once the situation in the Middle East clears, following the outbreak of war in Iran, would make it possible to release up to 6 per cent of global capacity that has been tied up for the past two years. This will shift pressure onto the docks. For Spain, it will represent a strategic opportunity: Valencia, Barcelona and Algeciras will strengthen their role as the natural gateway for intercontinental traffic into southern Europe. Their challenge is no longer to attract vessels, but to manage them efficiently and with intermodal coordination.

**THE SHIPPING INDUSTRY IS CONSOLIDATING NEW FLEET RENEWAL PROGRAMMES**

The sector will add 10 million TEU of capacity in the coming months, of which 65 per cent will be taken up by MSC, Maersk, CMA CGM and Cosco, leading the investment drive.

	TOTAL		IN PROPERTY		CHARTER		ORDERS	
	CAPACITY	VESSELS	CAP.	VESS.	CAP.	VESS.	CAP.	VESS.
1 Mediterranean Shg Co	7,189	979	4,543	725	2,646	254	2,103	120
2 Maersk	4,631	729	2,808	346	1,824	383	1,043	80
3 CMA CGM Group	4,165	711	2,626	357	1,539	354	1,854	146
4 COSCO Group	3,587	551	2,163	208	1,424	343	1,400	111
5 Hapag-Lloyd	2,378	284	1,449	132	929	152	477	58
6 ONE (Ocean Ntw. Express)	2,108	272	959	105	1,148	167	590	50
7 Evergreen Line	1,958	239	1,353	162	605	77	925	76
8 HMM Co Ltd	1,017	96	834	72	183	24	185	16
9 Yang Ming Marine Tpt. Corp.	710	96	334	59	376	37	237	18
10 Zim	704	117	83	14	622	103	163	18
11 Wan Hai Lines	585	119	585	119	-	-	398	39
12 PIL (Pacific Int. Line)	442	100	312	82	130	18	217	22
13 X-Press Feeders Group	203	107	113	51	90	56	40	6
14 SITC	186	120	164	100	23	20	46	21
15 UniFeeder	167	95	9	1	158	94	60	12
16 KMTC	152	64	86	30	66	34	43	4
17 IRISL Group	144	32	144	32	-	-	-	-
18 Global Feeder Shipping LLC	135	54	59	24	76	30	-	-
19 Sinokor Merchant Marine	135	71	132	69	2	2	52	4
20 Emirates Shipping Line	121	28	0	0	121	28	57	4
21 TS Lines	108	41	89	35	19	6	87	12
22 RCL (Regional Container L.)	104	35	94	29	10	6	137	19
23 Ningbo Ocean Shg Co	93	90	60	47	33	43	47	14
24 Sea Lead Shipping	92	22	7	3	85	19	-	-
25 Tangshan Port Hede Shipping	89	57	2	3	87	54	1	1
<b>TOTAL FLOTA MUNDIAL</b>	<b>33,799</b>	<b>7,509</b>						

Data as of 4/02/2026. Source: Alphaliner. Capacity in thousands of TEU.

**synergy.**  
A member of Hutchison Ports

**Daily rail connections**  
Logistics Services  
Train | Truck | Customs

Map locations: BORDEAUX, TOULOUSE, MARSILLA, BAYONNE, PAMPLONA (NGARI), MPANDA DE EBRO, AGONCILLO, ZARAGOZA, BARCELONA, BEST.

OPINION | CIRCULAR ECONOMY ENTERS PORTS: THE OPPORTUNITY OF REMANUFACTURING

# A KEY LEVER FOR DECARBONISATION

ALEX  
LÓPEZ ALLER

CEO  
Revenant Industrial &  
Ports Machinery



The decarbonisation of European industry is often framed as a race towards new technologies: electrification, hydrogen or fuels. All of them will be important pieces of the industrial future. However, we often forget that some of the most effective tools for reducing emissions, saving resources and strengthening our industrial competitiveness already exist and are available today. One of them is remanufacturing: subjecting equipment that has reached the end of its service cycle to a circular manufacturing process that enables it to begin a second operational life, technologically equivalent to that of a machine manufactured in the conventional way.

At a time when Europe is seeking to accelerate the energy transition without re-

nouncing its industrial capacity, remanufacturing is emerging as one of the smartest and most pragmatic strategies for advancing towards a more sustainable industry. Ports, as major logistics and industrial nodes, are a particularly suitable setting for understanding its potential.

One of the major challenges of the energy transition is time. Many of the technological solutions being proposed for the total decarbonisation of industry still require technological development, complex infrastructure or large-scale investment.

Remanufacturing, by contrast, is already available today.

Various industrial analyses show that rebuilding heavy machinery can reduce CO2 emissions by between 70% and 90% compared with the manufacture of a new piece of equipment. The reason is clear: most of the environmental impact of a machine does not occur during its operation, but during its initial manufacture. Large metal structures, hydraulic systems, transmissions and industrial components require processes that are highly intensive in energy and raw materials.

When equipment is remanufactured, its main structure is preserved, critical components are replaced, systems are upgraded and the unit is rebuilt under industrial standards equivalent to those of production. The result is a machine with a full second service life, but with only a fraction of the original environmental impact.

## Circular economy

For years, the circular economy has been associated mainly with recycling. However, its greatest real impact lies in something more strategic: extending the service life of complex industrial assets. In the port sphere, this takes on a particularly relevant dimension. A single machine can easily ex-

ceed 40 or 50 tonnes of steel and concentrate high-value technological components.

Each remanufactured unit means dozens of tonnes of materials that do not need to be produced again, a significant reduction in industrial energy consumption, less pressure on strategic raw materials and a decrease in industrial waste.

There is also a dimension that often goes unnoticed: remanufacturing is industrial policy as well. As opposed to a model based exclusively on importing new machinery, it makes it possible to develop local industrial capacity, generate skilled technical employment and retain technological know-how within the European productive fabric.

## Competitiveness

Europe faces a structural challenge: moving towards a decarbonised economy without weakening its industrial base vis-à-vis other regions of the world.

In this context, the circular economy ceases to be merely an environmental issue and also becomes a competitiveness strategy. Remanufacturing fits fully within this logic: it reduces dependence on raw materials, eases pressure on global supply chains and strengthens local industrial capacity.

Sectors such as automotive and aviation have been integrating remanufacturing into their production models for decades. Industrial and port ecosystems represent one of the next major areas for the development of this strategy.

It is not only a matter of reusing existing machinery, but of rebuilding industrial value from assets that are already part of the productive system.

European ports face a dual challenge: advancing their decarbonisation and maintaining their global competitiveness.

Renewing the machinery fleet is a key part of that process. However, completely replacing existing equipment with new units may prove economically complex and, paradoxically, is not always the most sustainable option if the full life cycle is analysed.

Remanufacturing offers a particularly interesting route. It makes it possible to modernise existing equipment, improve its energy efficiency, incorporate new

technologies and even adapt propulsion systems, while at the same time reducing the environmental impact and economic cost associated with full replacement. In many cases, it acts as a genuine accelerator of the transition, making it possible to move towards more sustainable models without waiting for complete technological renewal cycles.

The energy transition does not depend solely on the development of new technologies. It also requires a rethinking of how we use, maintain and extend the life of the industrial assets that already exist.

In that sense, remanufacturing represents more than a technical solution. It is a different way of understanding industry: more efficient in the use of resources, aligned with the principles of the circular economy and capable of generating industrial value within the territory itself.

Ports have historically been engines of economic transformation. Today, they also have the opportunity to become benchmarks for a new industry that is more sustainable, circular and competitive.

**REBUILDING HEAVY MACHINERY CAN REDUCE CO2 EMISSIONS BY BETWEEN 70% AND 90% COMPARED WITH MANUFACTURING NEW EQUIPMENT.**

All things great  
and small



**CONNECTING**  
valenciaport



Image of the Port of Algeciras Bay, which holds the leading position in perishable cargo traffic in Spain.

**TRAFFIC IN SPANISH PORTS | PERISHABLE GOODS**

# FRUIT AND VEGETABLE LEADERSHIP

**PORTS HANDLE 10 MILLION TONNES OF FRESH PRODUCE, WITH ALGECIRAS AND VALENCIA AT THE HELM**

Spain maintains its fruit and vegetable leadership despite the downturn in global trade. In 2025, ports handled 10.25 million tonnes of fresh produce, according to provisional data from Puertos del Estado, representing a drop of close to 9 per cent compared with the 11.3 million tonnes channelled in 2024.

The decline is mainly due to the reduction in fruit and vegetable exports and the weak performance of global trade, although Spanish ports continue to play their role as strategic logistics platforms for fresh produce, supported by refrigerated containers that ensure preservation of the cold chain and provide essential added value for per-

ishable cargo. In terms of volumes, the Port of Algeciras, with more than 4 million tonnes of fruit and vegetable cargo, leads traffic in Spain, once again strengthening its trade relations with Costa Rica, Peru, Egypt, Colombia and Ecuador, with which it handles flows of pineapple, avocado, banana and citrus fruit through its container terminals. Its most recent strategy includes a pioneering digital interoperability project with the Central American Trade Platform that will make it possible to speed up health certificates and customs documents, increasing the efficiency and reliability of fresh produce trade between Spain and Central America.

**FRUIT AND VEGETABLE TRAFFIC FELL BY 9% AT SPANISH PORTS DURING 2025**

**TRAFFIC EVOLUTION ON A DOWNWARD TREND**

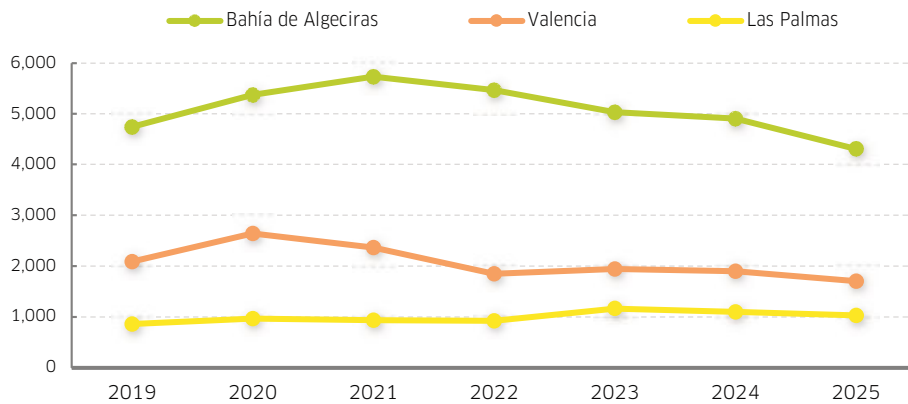
Fruit and vegetable cargo traffic at Spanish ports has maintained a downward trend over the past five years, a period in which it has fallen by 15%, amounting to a flow of 10 million tonnes in 2025.

	2025	%25/24	%25/19	2024	2023
Algeciras	4,309	-12%	-9%	4,904	5,027
Valencia	1,705	-10%	-18%	1,902	1,945
Las Palmas	1,030	-6%	+20%	1,099	1,166
S.C. Tenerife	587	-1%	+0%	592	621
Barcelona	526	-8%	-73%	571	549
Cádiz	370	-9%	+22%	406	409
Vigo	283	-4%	>999%	294	235
Tarragona	188	-32%	-0%	277	518
Huelva	173	+7%	+55%	162	172
Málaga	158	+71%	+218%	93	80
Almería	137	+30%	+87%	105	104
Motril	123	-26%	+34%	165	181
Baleares	116	+6%	-19%	109	121
Gijón	107	+41%	+21%	76	112
Bilbao	107	-1%	-36%	107	123
Santander	85	+30%	+201%	65	81
Alicante	74	-3%	-46%	77	80
Sevilla	60	-14%	-31%	70	94
Cartagena	51	-68%	-51%	157	210
Marín - Pontevedra	37	+91%	-75%	19	0
Castellón	17	-52%	-55%	36	48
Melilla	11	-6%	-39%	11	12
Vilagarcía	4	+200%	-80%	1	3
Ferrol - San Cibrao	2	-	-	-	1
Ceuta	1	-44%	-95%	1	1
<b>TOTAL</b>	<b>10,260</b>	<b>-9%</b>	<b>-15%</b>	<b>11,299</b>	<b>11,904</b>

Thousand tonnes. 2025, preliminary. Source: Puertos del Estado.

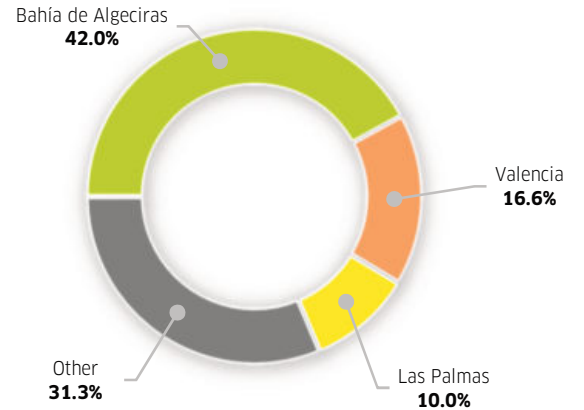
## SLOWDOWN AMID THE REDUCTION IN EXPORTS

Puertos del Estado explains that the decline in sales of Spanish products abroad is at the root of the drop in fruit and vegetable flows at the major ports.



Thousand tonnes. 2025, preliminary. Source: Puertos del Estado.

### YEAR 2025



## ALGECIRAS, VALENCIA AND LAS PALMAS, LEADING PERISHABLE TRAFFIC

For its part, the Port of Valencia channelled 1.9 million tonnes of fruit and vegetable products through 3,250 reefer connections, consolidating its position as a key node for national and international distribution. In third place, the Port of Las Palmas handled

more than 1,030,000 tonnes of fruit and vegetables. Citrus fruit, dried vegetables and potatoes led the flows, with 46 per cent of the cargo moved in refrigerated containers, followed by onions, garlic, leeks, nuts, bananas, tomatoes, frozen vegetables and

tropical fruits such as avocados, mangoes and pineapples.

Other ports such as Málaga, Almería, Tenerife, Barcelona, Cádiz and Vigo handled lower volumes, but remained relevant in inter-island and international fresh cargo traffic.



## OUTER PORT OF PUNTA LANGOSTEIRA

The Port Authority of A Coruña is facing the green transition with the project "A CORUNA GREEN PORT", which will enable the transformation and decarbonization of the industrial activities of its environs. It will also enhance the development, research and commissioning of projects focused on renewable energies.

[www.puertocoruna.com](http://www.puertocoruna.com)



Hub Port, leader in processed foods  
Depths over 20 m  
1,500 m moorings

More than 1 million of square metres of available areas for offshore industry licenses and new green energies sources

FUTURE CHALLENGES | SMART PORTS

# PORTS OF INGENUITY

**SPANISH PORTS CHANNEL AN ANNUAL AVERAGE OF €15 MILLION INTO DISRUPTIVE PROJECTS THAT ARE TURNING DOCKS INTO OPEN LABORATORIES FOR SUSTAINABILITY AND DIGITALISATION**

Over the past six years, Spanish ports have learned to look at themselves in the mirror of the future. No longer as static infrastructure, but as living organisms, capable of reinventing themselves through innovation. To this end, docks are being transformed into a dynamic laboratory charting new ideas through groundbreaking projects that open up a horizon of technological expansion.

And ports are doing so consistently, with an annual average of €15 million invested, a flow that already totals more than €60 million directed towards projects that not only optimise processes, but also rewrite the way logistics and maritime trade are understood.

**MORE THAN €60 MILLION HAS ALREADY BEEN INVESTED**

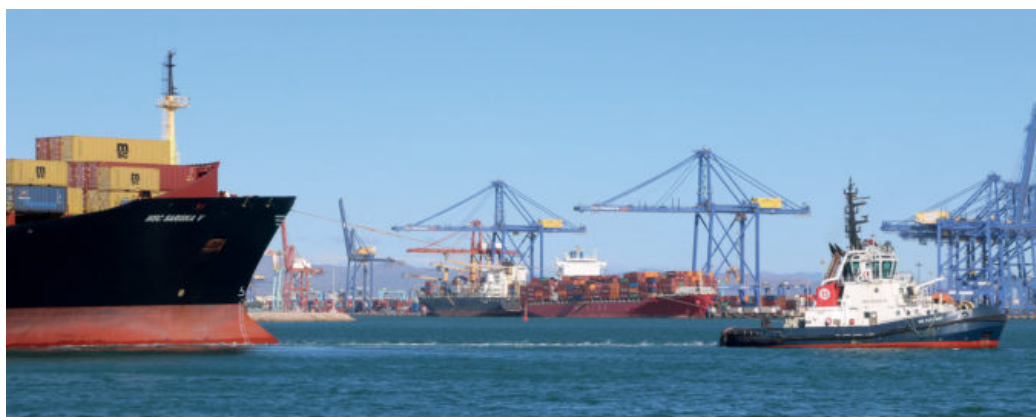
That steady flow of investment has attracted more than a thousand business ideas, of which more than a hundred have taken shape as tangible projects. It reflects a sector that, driven by the Ports 4.0 fund, has built an open innovation ecosystem in which start-ups, large corporations and port authorities coexist. “Those who do not integrate inno-

vation into their strategy will inevitably be left out of the market,” warns José Llorca, Head of Innovation at Puertos del Estado. His words feel like a beacon: they chart the course of a port system that understands that tomorrow’s competitiveness is decided by today’s technological choices.

In this context, the Distribution Committee of the Interport Compensation Fund, meeting in September 2025, approved the provisional resolution for the awarding of grants to 16 commercial projects worth €6 million, corresponding to the 2023 call. A total of 67 applications were submitted, of which

provide the Ports 4.0 programme with a new budget allocation of €18 million, which will make it possible to finance three new calls: ideas and commercial projects, launched in December, and pre-commercial projects, in 2026.

Ports are moving into territories where the human and the technological intertwine: robotised operations, autonomous vehicles already moving both on land and at sea, and a coexistence between machines and workers that opens the door to a new paradigm, that of human-machine integration. At the same time, the energy vector is marking a decisive shift.



66 were admitted and, ultimately, 16 have been proposed for funding.

The selected projects fall within areas such as logistics efficiency, safety, sustainability and process digitalisation, and involve 13 port authorities as enabling agents. At the same meeting, it was also agreed to

The decarbonisation of transport and the generation of green energy are no longer aspirations, but pieces that are steadily being put in place on the sector’s board. Hence many of the recent projects look to the air, the water and environmental impact as their



GRUPO ALONSO

Ports are moving into new territories, where the human and the technological intertwine.

main testing grounds: electronic noses that detect odours, predictive particle systems, solutions against contaminated ballast water, or initiatives to give ship waste a second life.

Created in 2018, the Ports 4.0 fund has matured into an international benchmark in open innovation. On 21 December 2024, Spain’s Official State Gazette (BOE) published a new call for aid for pre-commercial projects, endowed with €11.25 million. The objective: to support proposals in their early stages so that they reach a sufficient level of maturity to be tested in real environments.

From this call emerged, for example, the Perseo project, led by Sensia Solutions and Fundación Valenciaport, which deployed a multispectral camera system capable of measuring, in real time, pollutant emissions from vessels and port machinery. A sort of invisible eyes which, installed in

**PORTS 4.0 WAS CREATED IN 2018 TO DRIVE INNOVATION**

TRANSPORTE XXI



The Ports 4.0 fund is an open innovation model.

Valencia, Sagunto and Gandía, make it possible for the first time to x-ray the environmental footprint of each operation.

In May 2025, Puertos del Estado published the final resolution of the 2023 call under the ideas category: 47 projects selected from 87 applications. It is a mosaic of solutions pointing towards digital transformation, operational efficiency and environmental sustainability, the three major axes of the port future.

Autumn 2025 brought with it several emblematic demonstrations. At the port of Bilbao, the company Navozyme Maritime Technologies showcased its Port Clearance Pilot (PCP), a blockchain-based digital platform that transforms call clearance authorisation and MARPOL waste management through electronic certificates.

With live trials and modules, PCP embodies the traceability and efficiency of the smart port. Also in

Bilbao, the company Arctic Sea presented Clircular, a system of IoT sensors with reverse logistics that makes it possible to monitor goods in containers in real time and recover the devices for reuse. The project opens the door to reducing losses of sensitive products in global supply chains.

### THE SECTOR IS NAVIGATING WITH THE PORTS 4.0 FUND AS ITS COMPASS

The Ports 4.0 fund is the corporate open innovation model adopted by Puertos del Estado and the port authorities to attract, support and facilitate the application of talent and entrepreneurship to Spain's public and private port-logistics sector in the field of new technologies. Since its

creation, nine calls have been launched, receiving more than 900 applications, of which more than 215 ideas and projects have been awarded, for an amount exceeding €46 million.

Spanish ports no longer only load and unload cargo. Today, they incubate ideas, bring prototypes to life and test solutions that turn docks into open laboratories. The annual average of €15 million invested in innovation is the compass that has enabled the maritime, port and logistics sector to navigate towards sustainable, digital and resilient competitiveness.

The story Spanish ports are writing is not only about ships and cargo. It is the story of an infrastructure that has decided to open itself to talent, entrepreneurship and science in order to build the future from the present. A journey in which the wind is blowing in favour of innovation, a route of ingenuity.



Ready for regulatory changes.  
Can we help you?



**Customs formalities**  
ICS2, G3, G4,...



**European Maritime Single Window procedures**



**Automation of flows and information**



**Connections with PCS and Single Windows**



**Dashboard of operations per user**

www.portel.es
comercial@portel.es


FUTURE CHALLENGES | DOCK ELECTRIFICATION

# DOCKS ARE PLUGGING INTO THE POWER GRID

THE ROLLOUT OF THE ONSHORE POWER SUPPLY SYSTEM AT SPANISH PORTS, A KEY ELEMENT IN THE DECARBONISATION OF MARITIME TRANSPORT, IS MOVING AHEAD AT FULL STEAM

The electrification of docks is no longer a promise: it is plugging into the future. The OPS (Onshore Power Supply) system, which allows vessels to connect to the onshore power grid and switch off their auxiliary engines during port calls, is entering a decisive phase. After years of planning, feasibility studies and the search for funding, the first major installations are already a reality, marking a turning point in the sustainability of the Spanish port system.

The rollout of OPS has become one of Puertos del Estado's most ambitious programmes, with a budget allocation of €280 million for 2026 in the field of sustainability, that is, 17.5 per cent of the total planned investment, focused on dock electrification.

The EU timetable is tightening. From 2030 onwards, all ports included in the core TEN-T network must offer onshore power connections for container ships, ferries and cruise vessels. Spain, with more than twenty projects under way, is racing against the clock to meet the target and position itself as a benchmark in maritime efficiency and sustainability. Planned expenditure across the port system to plug docks into the grid exceeds €800 million through to 2029.

The Port Authority of Algeciras, which has long been taking steps towards climate neutrality, stands out in its own right. The port, chaired by Gerardo Landaluce, has been recognised for the progress made in dock electrification, according to a recent survey carried out by DNV for the

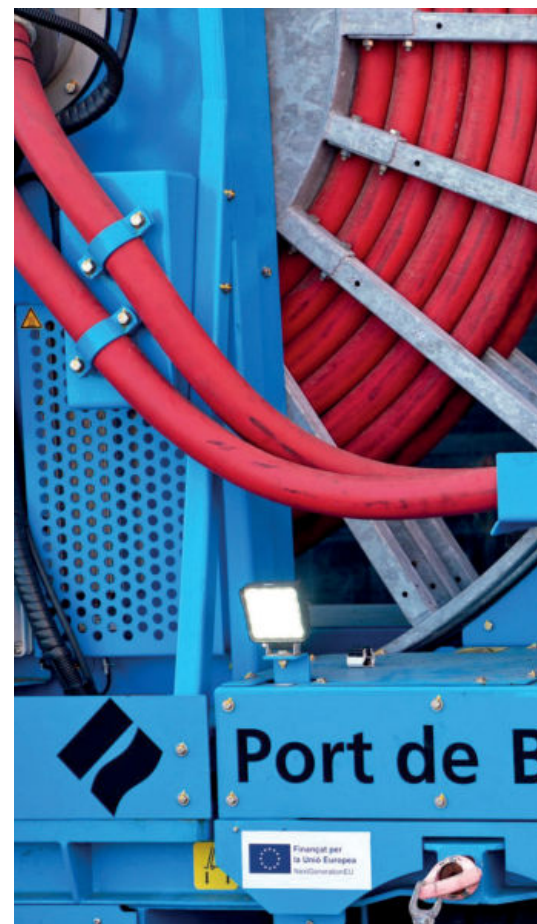
European transport and environmental organisation Transport & Environment (T&E), in which around thirty of the continent's leading ports took part.

The authority accounts for 29 per cent of all shore power infrastructure installed for ferries in Europe. With more than €80 million in scheduled electrification investment, the Andalusian enclave already has 20 of its 35 planned OPS connections at an advanced stage.

If Algeciras leads in capacity and pace of execution, Barcelona leads in strategic planning. Its phased electrification plan, known as the Nexigen Plan, has become a benchmark in the Mediterranean. Last autumn, the Government authorised the ten-

# €800

MILLION,  
THE PORTS'  
INVESTMENT



The Port of Barcelona completes the first phase of the Nexigen Plan.



A first OPS point is already in operation at the port of Palma.



dering of a €12.6 million contract (excluding VAT) for the drafting, execution and provision of electrical services for cruise ships at the future Catalonia Cruise Terminal G. The port authority, chaired by José Alberto Carbonell, already has the Mediterranean's first container terminal with an OPS connection at the BEST concession, as well as at the Sant Bertran quay passenger and ro-ro terminal, operated by Tramed (Grimaldi). In fact, BEST's OPS marked its first anniversary last September.

Also in the Mediterranean, the port of Valencia is accelerating its energy transition with the aim of reaching net-zero emissions by 2030. The first step in this project was the electrification of the quay at MSC's dedicated terminal and the area of the future Baleària terminal to serve ro-pax traffic at the port, as part of an investment package of around €25 million that has already been implemented. To this plan will now be added a further 80 million investment, according to Fundació Valenciaport.

In the Balearic archipelago, electrification is advancing strongly. The port authority has awarded the installation of four new OPS systems at the ports of Palma, Eivissa and Maó for close to 10 million. At the port of Palma, a first OPS point is already in operation for ferries and fast ferries at the Poniente

quays. On the Andalusian coast, the Port of Málaga is also moving towards full electrification, with a €50 million loan from the EIB to finance the expansion and modernisation of its energy infrastructure.

Remaining in this autonomous community, the Port of Seville signed a collaboration protocol a couple of years ago with Endesa for the design and planning of a set of measures to facilitate the energy transition of the port area before 2030 and turn it into a "national benchmark in sustainability and energy efficiency" within the port itself.

#### The Atlantic seaboard connects

In the north, ports are consolidating their commitment to clean energy. The Port Authority of Bilbao is moving forward with its BilbOPS project, part of its energy transition plan towards a carbon-neutral scenario by 2050. Tecuni, a company of the Vinci Energies group operating under the Omexom brand, was awarded the first works contract in 2023 to deploy OPS technology at the port of Bilbao.

Vinci Energies Spain has commissioned Ormazabal and Ingeteam to carry out works to guarantee medium-voltage electricity supply to vessels berthing at quays A5 and A6, where Consignaciones Toro y Betolaza currently operates as agent at the Basque port for shipping line Finnlines. Ormazabal and Ingeteam also carried out, in 2024, the deployment of OPS technology at the port of Cádiz, electrifying the passenger terminal in the Cádiz port area as suppliers to Endesa. In addition, in April last year, the Port Authority of Bilbao awarded a contract worth close to €50.1 million for the execution of the new electrical infrastructure to connect ships to the grid at quays A1, A2, A6, AZ3 and Getxo 2 and 3. Planned investment for the electrification of the docks at the port of Bilbao will exceed €100 million.

The port of Pasaia, for its part, has taken its first steps through an administrative concession granted to Iberdrola for the construction and operation of an OPS installation at the Kaputxinos quay. The project, with a budget of €11.1 million and subsidised

with €1.9 million by the Ministry of Transport, envisages a modular OPS station that will transform grid voltage and frequency to adapt them to the vessel's requirements.

On the same seaboard, the port of Santander is moving forward with the OPS-Santander project, promoted together with Iberdrola. The project includes seven connection points on four quays, an underground high-voltage line, a new substation and medium- and low-voltage lines. The port's chairman, César Díaz, stresses that the project represents "a decisive step towards the decarbonisation of maritime transport and the improvement of air quality".

In the north-west of the peninsula, Galician ports are not lagging behind. In Vigo, the Bouzas ro-ro terminal already has the infrastructure needed to connect to the power grid, which will allow shipping lines UECC and Suardiaz to switch off their engines during port calls. The Port Authority is also working on the electrification of the container and cruise terminals. A Coruña will offer onshore power to cruise ships from 2027 at the Traslánticos and Calvo Sotelo Sur quays.

Beyond the mainland, Canary Islands ports are also stepping up the pace towards sustainability. Las Palmas has already approved payment of the final certification for shore power supply to cold ironing vessels at Muelle Grande.

With Brussels setting the 2030 horizon, ports are moving ahead at different speeds, but towards the same destination: reducing emissions and modernising their operations. OPS is no longer the future: it is the new energy language of the docks.

### OPS, THE NEW ENERGY LANGUAGE OF SPANISH DOCKS

FUTURE CHALLENGES | ROBOTISATION

# SETTING COURSE FOR ERROR-FREE PORTS

ARTIFICIAL INTELLIGENCE AND ROBOTICS SOLUTIONS ARE CHANGING THE WAY WORK IS CARRIED OUT AT TERMINALS IN SPANISH PORT ENCLAVES

The noise of steel, the sway of cranes and the almost artisanal precision of stevedores have for decades defined a way of operating in ports based on reacting quickly when something went wrong. Today, that landscape is still there, but over it a new invisible layer has been superimposed: sensors, algorithms and systems that observe in silence, learn and anticipate. Robotics and artificial intelligence are rewriting the port narrative in Spain, not as an abrupt break, but as a profound and gradual transformation.

The pressure is well known. Container traffic continues to grow steadily, calls are becoming more

## THE CHALLENGE: ENSURING THERE ARE NO HUMAN ERRORS

concentrated, ships are getting larger and the physical space at ports, especially in the major Mediterranean enclaves, no longer allows for easy expansion. Valencia, Barcelona and Algeciras have in recent years experienced peaks of activity that have pushed their operations to the limit. In that con-

text, efficiency ceases to be an abstract objective and becomes a matter of competitive survival.

Spanish terminals have understood that the only way to gain capacity without gaining square metres is to optimise processes. Automation has been deployed across multiple layers: from the equipment itself to the systems that control it, including terminal control towers, new human-machine interfaces and data exchange

platforms involving the entire port community. Applied in combination, these technologies make it possible to achieve very significant cost reductions and productivity peaks that previously seemed unattainable.

The change, however, is not only quantitative. It is cultural.



Image of the Port of Barcelona.



Technology can already detect an accident involving a crane while it can still be avoided.

Port operations are beginning to move from a reactive model to a predictive one. It is no longer only a matter of acting when an incident arises, but of detecting it while it is still only a statistical possibility. It is on that frontier between what is happening and what is about to happen that artificial intelligence is finding its true value.

A revealing example of this new stage is the development

driven by Sibre Brakes Spain. The company has brought to the quay an idea as simple as it is disruptive: that port cranes should be able to “feel” before they fail. Its Guardian IIoT system works like a silent watchman, analysing in real time every crane movement, every vibration, every micro-deviation that the human eye cannot perceive. It does not detect the accident when it is already in-

evitable; it senses it while it can still be avoided. When the system identifies an anomalous pattern—an incipient snag, an oscillation outside range, a sequence that has historically preceded an incident—it issues an alert. That margin of seconds is enough to stop the operation and avoid a major stoppage, damage to cargo or a safety risk.

This approach fits with a broader trend at Spanish ports: the creation of digital ecosystems where everything is connected. Automatic gates, driven by artificial intelligence, have transformed the relationship with inland transport, reducing waiting times and making truck access more flexible. Advanced planning systems allocate resources in real time, adjusting operations to the exact pulse of traffic. Even stacking manoeuvres are beginning to rely on autonomous solutions that promise to improve safety and reduce emissions. Automation projects at terminals have reported reductions of around 30 per cent in vessel turnaround times, a valuable figure in a sector where every hour of quay occupancy has a direct

impact on costs and logistics planning, and which can translate into millions of additional TEU handled each year without the need to increase physical space.

Sustainability, in fact, has become another pillar of automation. Projects combining artificial intelligence with new clean propulsion systems, such as hydrogen, point to a new generation of port equipment capable of operating autonomously without sacrificing environmental targets. In this scenario, efficiency is no longer measured only in moves per hour, but also in avoided environmental impact.

Spanish ports are thus moving towards a model in which physical infrastructure is only one part of the equation. The true competitive advantage lies in the intelligence embedded in processes, in the ability to anticipate error and in turning every data point into a lever for improvement. On the docks of the 21st century, the noise of steel is still present, but more and more decisions are being taken in silence, long before the problem becomes visible.



**Less Wait.  
More Freight.**

Reducing truck idle time at your terminal with TMEIC OCR Solutions

**TMEIC**  
We drive industry

**TMEICPORTS.COM**

Salem, Virginia U.S.A. | Valencia, Spain  
+1-540-283-2000 | +34 961 117 483

**A TRANSITION YEAR**

Ship supply traffic recorded a negative year at Spanish ports, marking a change in trend compared with the increase in 2024 resulting from the numerous vessel diversions caused by the Red Sea crisis.

	2025	%25/24	%25/19	2024	2023
Algeciras	3,119	-9%	+30%	3,422	3,737
Las Palmas	2,907	-0%	+15%	2,911	2,327
Barcelona	1,738	-7%	+0%	1,876	1,563
Ceuta	840	+45%	+9%	580	643
S.C. Tenerife	794	-13%	+23%	915	734
Valencia	610	+4%	+82%	588	416
Cartagena	257	+21%	+41%	212	241
Cádiz	132	+11%	+55%	119	116
Vigo	132	+10%	-8%	119	135
Baleares	126	-21%	-56%	158	147
Huelva	118	-34%	-46%	179	170
Tarragona	108	-6%	+41%	115	111
Málaga	99	+16%	-4%	86	98
Almería	78	-17%	+0%	94	93
A Coruña	70	-24%	-8%	92	75
Santander	51	-7%	+97%	55	50
Avilés	49	+8%	+8%	46	48
Sevilla	37	+8%	+0%	35	37
Pasaia	31	+15%	+22%	27	27
Alicante	30	+38%	+37%	22	28
Motril	27	+12%	-27%	24	26
Castellón	26	-5%	+30%	27	29
Marín - Pontevedra	26	-4%	-18%	27	28
Bilbao	24	-84%	-79%	150	130
Ferrol - San Cibrao	16	+24%	+51%	13	14
Vilagarcía	8	-8%	+46%	8	7
Melilla	1	-85%	-82%	6	8
Gijón	-	-	-	28	23
<b>TOTAL</b>	<b>11,453</b>	<b>-4%</b>	<b>+14%</b>	<b>11,935</b>	<b>11,062</b>

Thousand tonnes. 2025, preliminary. Source: Puertos del Estado.

**TRAFFIC IN SPANISH PORTS | SHIP SUPPLIES**

# DEMAND DECLINE

**FLows MODERATED BY 4% AS MANY ROUTES WERE REVISED**

The business of supplying merchant and passenger vessels at Spanish ports experienced one of its best recent years in 2024, driven by the diversion of maritime traffic caused by the Red Sea crisis. Shipping lines then increased their consumption in Spain by 6 per cent, helped by the higher number of port calls and by the need to refuel and replenish on longer routes via the Cape of Good Hope.

However, 2025 brings a change in trend. Ship supply reached a volume of 11.45 million tonnes at the close of 2025, representing a 4 per cent decline compared with the volume recorded the previous year. The sector is thus entering a phase of normalisation, following the exceptional boost seen in 2024, marked by less intense diversions and by increasingly tight international competition in prices and services.

Ship supply is a strategic logistics activity for the Spanish port system. It ranges from energy supply —hydrocarbons, water, liquefied natural gas and the first developments linked to electrification— to the provision of food, spare parts and equipment for merchant ship and cruise vessel crews. It is a chain of services that supports a highly specialised ancillary industry with a strong impact on port employment, especially in enclaves such as the Bay of Algeciras and Las Palmas.

“The activity is cyclical by definition: there are years of strong growth and years of adjustment,” operators consulted by Transporte XXI explain, stressing that the

final volume depends both on the number of port calls and on competitiveness against other major supply ports, some of which operate with more aggressive cost structures.

In 2025, the number of vessels served remained high, but shipping lines adjusted consumption and optimised refuelling, in a context of tighter cost control and route revisions. The spillover effect of diversions via Africa “is losing momentum, although it has not disappeared completely, which explains why the decline in ship supply is moderate rather than abrupt”, sector sources explain.

The business also remains highly concentrated. The Bay of Algeciras retains its leadership as the main ship supply port in the Spanish port system, with more than 29 per cent of the national market and close to half of the total on the Spanish mainland, although it recorded a further adjustment in volumes in 2025. Its strategic position in the Strait of Gibraltar remains key, in a scenario of direct competition with the supply services offered by the British colony of Gibraltar, strengthened in recent years by the Rock’s floating bunkering stations.



**14%**

**GROWTH BETWEEN 2019 AND 2025 DESPITE THE DECLINE IN THE LAST YEAR**

**Las Palmas, on the Atlantic route**

For its part, Puertos de Las Palmas is consolidating the growth achieved in 2024, supported by its role as a natural port of call on Atlantic routes between Europe and the Far East. The Canary Islands port maintains high ship supply volumes, as does

# TRD

## TRÁNSITOS RODRÍGUEZ DÍAZ

CUSTOMS - TRANSIT - TRANSPORT - STORAGE - DISTRIBUTION



ES AEOF 12000042AE

C/ Álvaro Rodríguez López, No.10 - D 1  
38003 Santa Cruz de Tenerife  
(+34) 922 276 655  
tenerife@trdcanarias.es

C/ Nispero, 15 - Local 3  
35010 Las Palmas de Gran Canaria  
(+34) 928 482 395  
laspalmas@trdcanarias.es

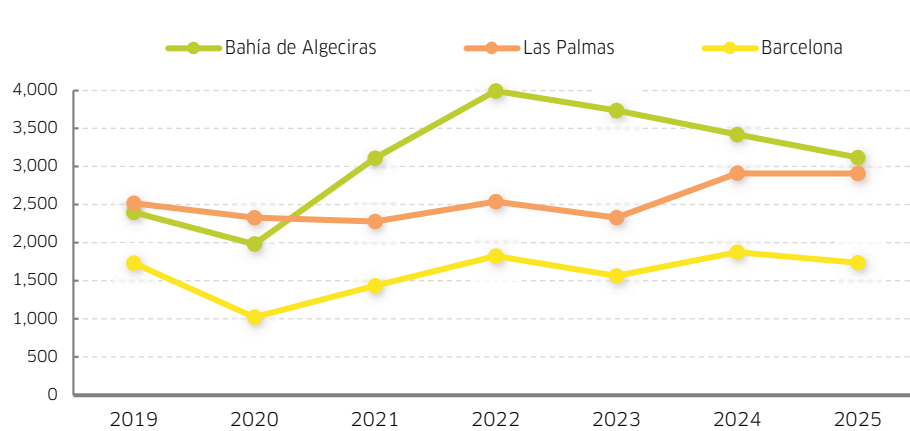
Galia Puerto Building, Office 1  
C/ José Delgado Brackunbury No.11  
41011 Sevilla  
(+34) 922 276 655  
sevilla@trdcanarias.es



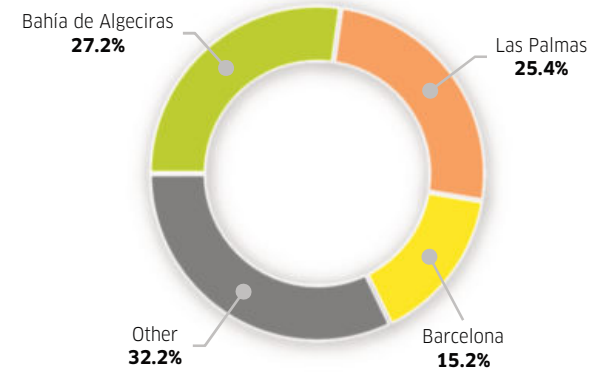
www.trdcanarias.es - App: trdcanarias

**BAY OF ALGECIRAS AND LAS PALMAS, THE PILLARS OF SHIP SUPPLY IN THE MEDITERRANEAN AND THE ATLANTIC**

Together, these two enclaves account for 52% of ship supply activity in the Spanish port system.



YEAR 2025



Thousand tonnes. 2025, preliminary. Source: Puertos del Estado.

**THE SPILLOVER EFFECT OF DIVERSIONS VIA AFRICA “IS LOSING MOMENTUM” IN 2025, “ALTHOUGH IT HAS NOT DISAPPEARED COMPLETELY, WHICH EXPLAINS A MODERATE DECLINE IN TRAFFIC”**

Santa Cruz de Tenerife, which continues to benefit from the increase in container ship calls and from the greater activity of Spanish shipping lines in the archipelago. On this basis, ship supply is approaching 2026 from a structurally solid position, but with less tailwind than a year ago.

The sector is confident that the combination of advanced services, operational re-

liability and responsiveness will allow Spanish ports to retain a significant share of consumption, even in a context of less exceptional circumstances. The major challenge will be to turn the temporary peak of 2024 into recurring activity in the coming years, although uncertainty prevails in the sector due to the geopolitical climate.

**REAL AGENCY 24 HRS 365 DAYS**

- Algeciras
- Barcelona
- Cádiz
- Canary
- Ceuta
- Gibraltar
- Huelva
- Motril
- Tánger

**WWW.BACOMAR.COM**



Bunkering operations on a Brittany Ferries vessel.

TRAFFIC IN SPANISH PORTS | BUNKERING

# LOW FUEL DOCKS

SPANISH PORTS REDUCED FUEL SUPPLY BY 5% IN 2025 DUE TO THE NORMALISATION OF ROUTES

Bunkering at Spanish ports entered a phase of adjustment in 2025 after several years of sustained growth. The port system closed the year with a cumulative volume of 9.46 million tonnes, representing a decline of 5 per cent compared with 2024, when volumes came close to ten million tonnes and one of the best results of the past decade was recorded. This is not an abrupt fall, but rather a change in trend pointing to a market normalisation after exceptional years. Port sources agree that the year reflects an orderly landing after the strong momentum seen since the end of the pandemic.

The ship fuel supply sector had enjoyed a clear period of buoyancy since 2020, when total volumes in Spain fell to 6.5 million tonnes, then weighed down by the sharp reduction in operations in the Bay of Algeciras. From that

low point, bunkering did not stop growing until reaching its most recent peak in 2022 and consolidating at very high levels in 2023 and 2024. The decline in 2025 does not erase that path, but rather confirms that the activity remains well above pre-pandemic levels and continues to be strategic for the Spanish port system.

The adjustment is once again centred mainly on the Bay of Algeciras. The country's largest bunkering enclave closed 2025 with 2.98 million tonnes, 8.9 per cent less than the previous year, extending a loss of volume that had already begun in earlier years. The performance of Algeciras once again highlights the strong competition it faces from Gibraltar, both in liquefied natural gas bunkering operations and in other fuels and biofuels, in an environment in which shipping lines are seeking flexi-

## SHIPPING LINES ADJUST CONSUMPTION

Spain's three leading ports in bunkering activity reduced their traffic in 2025, although the cycle since 2019 remains positive.

	2025	%25/24	%25/19	2024	2023
Algeciras	2,979	-9%	+36%	3,269	3,560
Las Palmas	2,611	-1%	+15%	2,650	2,065
Barcelona	1,392	-13%	-2%	1,601	1,270
Ceuta	804	+46%	+7%	552	622
S.C. Tenerife	658	-15%	+26%	770	585
Valencia	500	+1%	+98%	496	348
Huelva	92	-35%	-51%	142	136
Vigo	70	+20%	-1%	58	60
Málaga	52	+53%	+35%	34	37
A Coruña	37	-11%	+18%	41	30
Tarragona	34	+3%	+115%	33	35
Almería	33	-23%	-23%	43	47
Cartagena	32	+90%	+164%	17	18
Santander	32	-1%	+220%	32	30
Cádiz	29	+13%	+117%	25	23
Bilbao	20	-75%	-69%	79	68
Motril	17	+16%	-11%	15	17
Sevilla	17	+11%	+47%	16	18
Marín - Pontevedra	17	+16%	-4%	15	15
Avilés	14	+11%	+25%	13	13
Pasaia	11	+11%	+26%	10	11
Ferrol - San Cibrao	8	+3%	+63%	8	8
Vilagarcía	2	-37%	+83%	3	3
Alicante	2	+34%	-50%	1	2
Baleares	0	-50%	-95%	1	1
Gijón	-	-100%	-100%	28	23
Castellón	-	-	-	-	-
Melilla	-	-	-	-	-
<b>TOTAL</b>	<b>9,465</b>	<b>-5%</b>	<b>+18%</b>	<b>9,952</b>	<b>9,044</b>

Thousand tonnes. 2025, preliminary. Source: Puertos del Estado

**BUNKERING IS A STRATEGIC SECTOR THAT REINFORCES THE CONNECTIVITY OF SPANISH PORTS**

bility, speed and cost optimisation in their transit through the Strait.

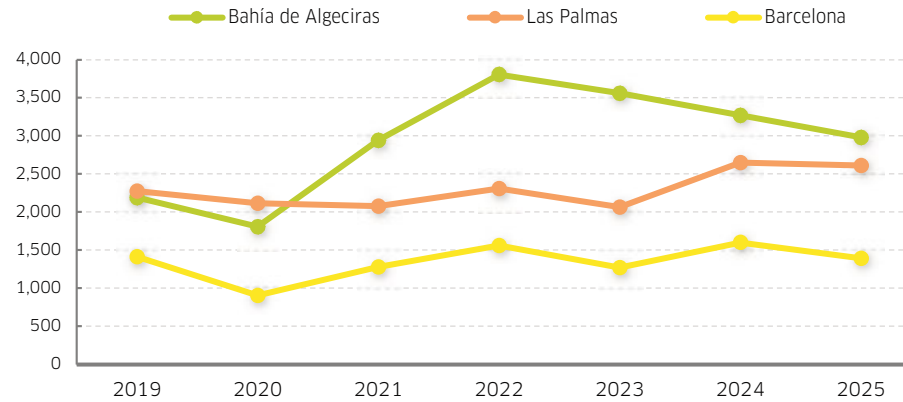
**Ceuta stands out**

Against this backdrop, Ceuta is consolidating its position as one of the most dynamic enclaves, with growth of 45.8 per cent, surpassing 800,000 tonnes supplied and reinforcing its position as an alternative in the south.

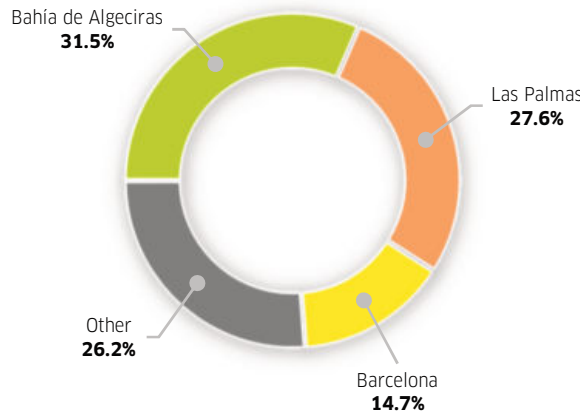
The map of Spanish bunkering reflects very uneven performance. Cartagena, Málaga, Vigo and Marín posted significant increases, while enclaves such as Barcelona, Huelva, Bilbao and Las Palmas recorded sharper declines, in some cases after years of growth, while Valencia remained stable among the Mediterranean enclaves.

**A SCENARIO OF WEAKENING DEMAND IN BUNKERING TRAFFIC**

Shipping lines reduced their fuel consumption at Spain's main ports.




**YEAR 2025**



Thousand tonnes. 2025, preliminary. Source: Puertos del Estado.

**ON THE ROUTE TO NET ZERO CARBON**


The adjustment in volumes is taking place in parallel with the profound transformation under way in the maritime and port sector towards a net-zero-carbon model. Port authorities have stepped up investments and action programmes aimed at dock electrification, the development of infrastructure for liquefied natural gas and biofuels, as well as the gradual incorporation of new fuels such as methanol and the first projects linked to green hydrogen. "Bunkering is no longer measured solely in tonnes supplied, but in the environmental quality of the fuel and its fit within the European Union's climate objectives," explains an operator working at several Spanish ports.




**THE BORDER NO LONGER SEPARATES, IT CONNECTS: YILPORT ELVAS**

YILPORT Iberia expands its network with its new multimodal logistics platform in Elvas.

- ✓ 9.579m<sup>2</sup> of operational space
- ✓ Container Terminal
- ✓ Bonded Warehouse
- ✓ Cold Warehouse
- ✓ Rail and road connections to the main Iberian ports





ib.sales.dg@yilport.com

@yilportiberia

YILPORT Iberia

FUTURE CHALLENGES | LIQUEFIED NATURAL GAS

# FULL LNG AHEAD

SPANISH PORTS SUPPLIED CLOSE TO 894,000 CUBIC METRES OF LNG IN 2025, OF WHICH 12% WAS BIO-LNG, ACCORDING TO GASNAM DATA



Maritime propulsion using liquefied natural gas continues to gather pace on the Iberian Peninsula. During the past year, these ports supplied 893,860 cubic metres of LNG, more than four times the volume recorded just two years earlier for this fuel, according to Gasnam data.

This technology platform points out that Iberia has narrowed the gap separating it from the Netherlands, the leading European benchmark, which recorded 989,459 cubic metres in 2025, only 2 per cent more than the previous year. If the current trend is maintained, the Iberian Peninsula is in a position to become Europe's leader in LNG bunkering in 2026. This growth responds, on the one hand, to the increasing number of vessels equipped to sail on LNG. The global fleet now totals nearly 1,500 vessels powered by this transition fuel, including those already in operation and those in the orderbook.

On the other hand, Gasnam highlighted the gradual development of bunkering infrastructure for liquefied natural gas, which has enabled Spanish ports to consolidate their position as benchmark hubs in the supply of alternative fuels.

Bunkering operation by the Avenir Aspiración in Málaga.



The port of Barcelona strengthened its leading role in LNG supply in Spain in 2025. The Catalan port area recorded 231,787 cubic metres of liquefied natural gas as fuel for ships, 1 per cent above the all-time record set in 2024.

The port authority, chaired by José Alberto Carbonell, recorded an increase last year in calls by LNG-powered vessels, especially cruise ships.

The port of Barcelona continues to work to give further momentum to the use of LNG and new zero-emission fuels. To this end, it will move forward with the tender specifications for the commercial LNG supply service, which will include a simplified

authorisation procedure by type of receiving vessel (cruise ships, container ships, ro-ro and ro-pax vessels...). The first LNG bunkering operations this year from barge to container ships and vessels at anchorage are also planned.

To increase the volume of LNG supplied to vessels, the Port Authority of Barcelona plans to expand the number of fuel suppliers and barges operating in the port. In this regard, several companies have shown interest in obtaining

authorisation and positioning barges in Barcelona or in the western Mediterranean.

## Bio-LNG

In addition, bunkering with decarbonised bio-LNG has expanded, in a process initiated in 2025, at the regasification plants controlled or partly owned by Enagás at the ports of Barcelona, Bilbao, Cartagena, Gijón, Huelva and Valencia, as well as at



Reganosa's facilities located in the port of Ferrol.

Axpo is also involved in this development of bio-LNG, having chartered the supply vessel Avenir Aspiration, with which it has supplied the decarbonised fuel through operations in the roadsteads of Cartagena, Málaga and Algeciras for various container vessels operated by MSC and CMA CGM, among other shipping lines.

Naturgy and Enagás have agreed to build and charter the vessel Mistral LNG.

Gasnam stressed that 12 per cent of the LNG supplied in 2025 was already of renewable origin (bio-LNG), representing significant progress towards reducing emissions and achieving climate neutrality in maritime transport.

This growth will continue, as Valencia-based shipping company Baleària announced last December that it will sail on biogas between the ports of Valencia and the Balearic Islands, as part of its objective of eliminating all its maritime and land-based emissions before 2030. To this end, the company, chaired by Adolfo Utor, will combine renewable fuels, such as biomethane, with electric power in the fleet of vessels it already uses on the regular route.

To encourage this initiative, the shipping company has signed an agreement with the port authorities of Valencia and the Balearic Islands that will make it possible to develop a green shipping corridor between the two ports, with the aim of advancing in emissions reduction and the energy transition of maritime transport, in which ports are key to providing the company with electricity and biomethane supply points.

Meanwhile, Madrid-based energy operator Molgas Energy Group expanded in Europe its LNG and bio-LNG supply business for industrial, road transport and maritime customers through the full acquisition last year of Dutch company Titan Clean Fuels.

### BALEÀRIA WILL SAIL ON BIOGAS BETWEEN VALENCIA AND THE BALEARIC ISLANDS

### STS OPERATIONS DOUBLE

Ship-to-ship (STS) transfer operations increased from representing 44 per cent to 80 per cent of the total at Spanish ports during the last financial year, consolidating their position as the majority option over other formats due to their greater flexibility and operational efficiency.

In this field, Naturgy and Enagás, through their subsidiary Scale Green Energy, announced this year an agreement for the construction and chartering of the vessel Mistral LNG, which will have a cargo capacity of 18,900 cubic metres of LNG and bio-LNG.

This operation consolidates Scale Green Energy as a shipowner in LNG bunkering by adding to its current fleet of three vessels, comprising Levante LNG, Alisios LNG and Haugesund Knutsen.

At present, the global fleet consists of 62 LNG supply vessels in operation and 38 on order, strengthening supply capacity at the world's main international ports. Gasnam also highlighted that Portugal reached a milestone in 2025, with the effective start of LNG supply to ships. In total, it recorded 342 GWh supplied in 13 operations, concentrated mainly in STS operations at the port of Sines.

**Where energy comes from**

Electric energy and modern living go hand in hand. It is important to have a reliable and efficient supply of this energy which serves to improve the competitiveness of the Basque economy, guaranteeing and ensuring quantity and quality of the energy supply.

Bahía de Bizkaia Electricidad is an independent producer of electric energy that uses natural gas as the primary fuel to provide energy efficiently and with the minimum environmental impact, as we are firmly committed to total respect for the environment.

**BBE**  
Bahía de Bizkaia Electricidad

www.bbe.es

FUTURE CHALLENGES | NEW VECTORS

# SETTING SAIL

**SPANISH COMPANIES BOUND4BLUE AND WINDWAVES ARE POSITIONING THEMSELVES IN THE EMERGING WIND PROPULSION MARKET, WHICH IS EXPECTED TO EQUIP A FLEET OF MORE THAN 3,000 VESSELS BY 2030**

Wind-assisted propulsion systems (WAPS), such as rotor sails, suction sails, wing sails and kites, are attracting growing interest as the shipping industry faces increasingly stringent greenhouse gas (GHG) emissions regulations, in line with the goal of achieving maritime decarbonisation by 2050.

WAPS developments already provide annual fuel savings of between 5 and 20 per cent for vessels, according to the shipowners, operators and manufacturers engaged in this technology, which translates into GHG emissions reductions in the same proportion.

More than 50 vessels were already sailing with wind assistance, and close to a hundred newbuildings were in the orderbook. The International Windship Association (IWSA) is forecasting strong growth, with the fleet expected to exceed 3,000 vessels by 2030.

## IT PROJECTS ANNUAL FUEL SAVINGS OF UP TO 20%

### Suction sails

Spain is present in this pioneering industry through a Cantabrian company that is a benchmark in the development of suction sails. Bound4blue, which since completing its first installation in 2021 has deployed its eSAIL technology on eight vessels, has a further 11 ships in its orderbook, representing more than 50 suction sails. Its customer portfolio includes Eastern Pacific Shipping, Maersk Tankers, Odfjell, Klaveness Combination Carriers, BW Epic Kosan and Louis Dreyfus Company, among other shipowners.

One of its most recent jobs was the installation of four suction sails on the Maersk Trieste, the first of five Maersk Tankers vessels on which the Cantabrian company will deploy 20 of its eSAIL units.

In addition, in 2025 it installed four 26-metre-high suction sails on the Atlantic Orchard, chartered by Louis Dreyfus Company (LDC) and owned by Sweden's Wisby Tankers AB (Wisby Tankers). The installation was carried out at the Astander shipyard in the port of Santander, as was the 22-metre eSAIL fitted on the general cargo vessel Fluvius Tavy of Amasus Shipping.

EEMS Traveller, with two Bound4blue sails, at the port of Seville.

For the same shipping company, it undertook in 2023 the installation of two 17-metre-high suction sails on the vessel EEMS Traveller. This work, approved by Bureau Veritas, was carried out in the port of Bilbao, within the framework of the Sails for Cargo project, co-financed by the Ports 4.0 Fund of Puertos del Estado, and supported by the Port Authority of Bilbao, Bilbao PortLab, Toro y Betolaza and Haizea Wind Group.

Bound4blue highlights that its DNV-certified technology is designed to simplify and facilitate integration into both new-build and retrofit projects across a wide range of vessel types, including tankers, bulk carriers, ro-ro vessels, cruise ships, ferries and gas carriers, among others.

The Cantabrian company, founded in 2014, announced last year the establishment of a series of alliances to manage, through Chinese industrial partners, annual production of one hundred units of its suction sail system from this financial year onwards.

Bound4blue also closed a \$44 million financing round in 2025 backed by maritime corporations, shipowning families, investors and government capital.



The transaction was led by Octave Capital, an investment platform affiliated with shipowner IMC, and Katapult Ocean. It also brought in new entities such as Motion Ven-

tures, the Odfjell family office and the ReOcean Fund (led by the Prince Albert II of Monaco Foundation and Monaco Asset Management), alongside others that reinforced their com-



Tanker Brands Hatch, fitted with BAR Technologies' WindWings.

mitment to the Cantabrian company, such as Shift4Good, GTT Strategic Ventures, KAI Capital and CDTI (Innvierte SIC).

### Wind propulsion

Another Spanish company backing the emerging wind propulsion industry for shipping is Windwaves, a subsidiary of the Amper group, which has an agreement with the UK's BAR Technologies to develop its WindWings rigid sail technology.

This company is expanding its production capacity at its factory in As Somozas (A Coruña), which has workshops covering more than 35,000 square metres, as well as with a new large-assembly plant at the outer port of Ferrol. It will occupy around 70,000 square metres and is scheduled to enter service in the first quarter of 2027.

BAR Technologies reached a milestone last year with the installation of three 37.5-metre-high WindWings on the tanker Brands Hatch.

This development forms part of the contract with UK shipping company Union Maritime, which in 2024 ordered the implementation of BAR Technologies' system on a total of 34 newbuild vessels, including 14 long-range tankers (LR2), 12 chemical tankers and another 8 medium-range tankers (MR).

Earlier, Cargill revealed the results of a six-month trial with the bulk carrier Pyxis Ocean, fitted with two 37.5-metre WindWings, which made it possible to save the equivalent of around three tonnes of fuel per day.

### Booming market

In addition, the global wind propulsion market is being driven by UK company Anemoi Marine Technologies, focused on rotor sails, which has an agreement with Cosco Shipping Heavy Industry shipyards. A large part of its work is destined for bulk carriers belonging to Berge Bulk, NS United Kaiun Kaisha and U-Ming.

For its part, France's Oceanwings is working with a wing sail development that has already been installed for methanol tanker owner EuroGreen Maritime, as well as for ro-ro shipping company Alizée, which specialises in wind cargo transport.

Airseas, controlled by Japan's K Line, is promoting kite technology, one of whose most recent deployments has been on the vessel Cape Brolga. In addition, Michelin is backing the development of the inflatable sail system Wisamo.

**WINDWAVES  
WILL EXPAND  
WITH 70,000 SQ M  
AT THE OUTER  
PORT OF FERROL**

**BOUND4BLUE HAS  
INDUSTRIAL  
PARTNERS IN  
CHINA**

Maersk  
Triestre  
equipped with  
four  
Bound4blue  
eSAILS.



FUTURE CHALLENGES | HYDROGEN

# THE H2 REVOLUTION TAKES STOCK

THE PORT OF VALENCIA SUCCESSFULLY MEETS THE CHALLENGE OF OPERATING A STACKER AND A TERMINAL TRACTOR POWERED BY HYDROGEN

The network of Spanish ports continues to take steps towards incorporating hydrogen into its operations. Valencia has been a pioneer in introducing this new energy vector into terminal equipment through the H2Ports project, launched in 2019, although real-life trials began in September 2023. The ports of Bilbao and Seville have also hosted, in recent months, pilot tests of hydrogen-powered tractors through their participation in the H2TowTractor and H2Tractor initiatives, respectively. In addition, the ports of Alicante, Barcelona, Palma and Vigo, among others, are also moving forward to incorporate hydrogen into their energy transition processes.

Last December, the Port of Valencia hosted the final conference of the H2Ports project. This initiative, coordinated by Fundación Valenciaport in close collaboration with the Port Authority of Valencia, has positioned the Spanish port area as the first and only port in the world to operate, under real conditions, a container stacker and a terminal tractor powered exclusively by hydrogen.

H2Ports has involved an investment of €4 million and the participation of operators such as MSC Terminal Valencia and Grupo Grimaldi, together with technology partners such as Hyster-Yale, Atena, Ballard Power Systems Europe, Carburos Metálicos and Engagás. The initiative has focused on validating hydrogen-based solutions that can be integrated into port operations without compromising the levels of performance and safety required by the sector. The Port of Valencia has successfully met the challenge by becoming the first in Europe to demonstrate the operation of heavy cargo-handling machinery powered solely by hydrogen.

The next major challenge is now to move “from pilot projects to full deployment”, the chairwoman of the Port Authority of Valencia, Mar Chao, said at the event, which will require investment, regulatory support and, above all, collaboration. In her view, “collaboration is the key” to building hydrogen ecosystems in which production, storage and consumption are integrated

€4  
MILLION  
WAS ALLOCATED TO  
THE H2PORTS  
PROJECT

40%  
OF GHG EMISSIONS  
COME FROM  
TERMINAL VEHICLES

2  
MW  
WILL HAVE  
THE HYDROGEN  
STATIONS IN  
BARCELONA  
AND VIGO

not only within ports, but also at regional scale.

Valérie Boullion-Delporte, Executive Director of the Clean Hydrogen Partnership, the body promoting the project, stressed that ports, located very close to cities and residential areas, generate a strong environmental impact, reminding the audience that “emissions from container yard vehicles can account for up to 40 per cent of the port’s greenhouse gas (GHG) emissions”.

In her view, “batteries and liquefied natural gas have a role to play, but they cannot fully cover the needs of high-power, 24/7 port operations”. She therefore insisted that Europe needs truly zero-emission technologies, stating that “hydrogen fuel cells are one, not the only one, but one of the very few options capable of delivering high power and high availability at scale”.

## Bilbao

The Port of Bilbao, through the Bunge Ibérica terminal, has become the first operating environment to host real-life trials of the H2TowTractor, an innovative hydrogen-powered towing vehicle designed to decarbonise high-intensity logistics activities. The initiative uses an ATA E405AC tractor, capable of carrying up to 50 tonnes and delivering zero emissions through the use of hydrogen.

For the rollout of the new sustainable port transport solution, Petronor is responsible for supplying renewable hydrogen. For its part, IBIL, owned by Repsol and the Basque Energy Agency (EVE), will manage the refuelling station to dispense green H2 to the tractor used by Bunge Ibérica at its terminal in the port of Bilbao.

The Basque Mobility and Logistics Cluster (MLC ITS), together with the Italian partners Agency for Energy and Sustainable Development (AESS), ATA Tow Tractor, the Bologna Agri-Food Centre (CAAB) and US-based Arco Technologies, are driving H2Tow.



Also at the Basque port area, CSP Iberian Bilbao Terminal is participating in the H2Integra project, an implementation initiative involving the retrofit of a hydrogen system on a conventional RTG port crane, which is currently diesel-powered.

For its part, the Port Authority of Seville (APS) is involved in the H2Tractor initiative aimed at carrying out a real-life operational trial at the container terminal of the Port of Seville of a vehicle developed by EVO, designed to transport up to 95 tonnes with an autonomy of 16 hours.

The Port Authority of Alicante has approved the call for public tender for the construction and operation of a renewable hydrogen production and supply plant at Quay 19. The facility forms part of the Portali-H2 project and represents a decisive step forward in the integration of clean industrial tech-

**BUNGE  
TESTS A  
TRACTOR  
IN BILBAO**



Final conference of H2Ports at the port of Valencia.

nologies to improve energy efficiency and reduce emissions from port operations as well as from the maritime and land transport linked to the port.

The Port of Barcelona is also finalising the construction of a hydrogen station for trucks, buses and landside equipment at terminals and logistics areas. This new facility, with a minimum production capacity of 2 MW, is located on a plot of around 7,000 square metres in the ZAL logistics zone. The tender for its execution provides for a 40-year concession term with the possibility of extension.

In the same field, the 'Julio Verne' project at the Port of Vigo is working on the installation of a 2 MW green hydrogen production plant on its quay. The hydrogen generated will be used to power pilot and demonstration projects in port logistics, fisheries, automotive and shipbuilding. The partners participating in the initiative, together with the port authority, are Univergy, Quantum Group, Anfaco, Soltec Ingenieros, Neuwalme, the University of Vigo, Grupo Botamavi, Unvi, Aister, Energylab, Aclunaga and Ctag.

Lastly, the Port Authority of the Balearic Islands is promoting a green hydrogen fuel cell for the electricity supply of Maritime Station 4 (EM4) at the port of Palma.

**ALQUITRAILER**  
Quality on road

All-in-one transport solutions

- ✓ Container and semi-trailer rental and sales
- ✓ Own workshop with 24-hour assistance
- ✓ Container depot in Valdetorres de Jarama (Madrid)
- ✓ Logistics storage services
- ✓ New site in Torrejón del Rey (Guadalajara)

info@alquitrailers.com  
916 524 051 - 902 570 691  
www.alquitrailers.com





FUTURE CHALLENGES | NEW FUELS

# CLOSER TO NET ZERO

THE SECTOR IS ADVANCING IN THE DEVELOPMENT OF GREEN METHANOL FOR THE NEW SUSTAINABLE FLEET

To deliver maritime decarbonisation, “technological advances in vessel efficiency and the current supply of sustainable fuels are not enough”, said Miguel Núñez, from the Directorate-General of the Merchant Marine (DGMM), during a webinar on the “Use of synthetic fuels in the maritime sector. Current status”, organised in November last year by the Spanish Shipowners’ Association (Anave) and the Ministry of Transport.

“Electricity can only go so far and biofuel production is limited. Therefore, we have to think about RFNBOs, for which we need hydrogen, biogenic CO<sub>2</sub> or direct air capture,” the DGMM official said at the same event.

In pushing synthetic fuel production, Núñez highlighted the presentation of the European Commission’s Sustainable

Transport Investment Plan (STIP), through which it will mobilise at least 2.9 billion by the end of 2027 to decarbonise maritime and air transport.

In the same vein, Miguel González, from Moeve, recalled during the same event the company’s commitment to the Andalusian Green Hydrogen Valley, involving an investment of 5 billion in two plants, located in Palos de la Frontera (Huelva) and San Roque (Cádiz), with a combined electrolysis capacity of 2 GW, for the annual production of 300,000 tonnes of renewable hydrogen, 600,000 tonnes of ammonia and 300,000 tonnes of methanol.

**SYNTHETIC FUELS REQUIRE LONG-TERM CONTRACTS**

## Repsol in Tarragona

Alongside Moeve’s project, Repsol is also managing an outlay of more than 800 million in the Tarragona ecoplant, with the capacity to transform non-recyclable municipal solid waste into renewable methanol and circular products.

Repsol’s facility in Tarragona will process up to 400,000 tonnes of waste per year and produce around 240,000 tonnes of renewable fuels and circular products. Start-up is scheduled for 2029 and the project has been selected by the European Union to receive funding from the Innovation Fund programme.

Meanwhile, Hymet Musel, a subsidiary of the Basque group HyFive, controlled by Swiss investor White Summit Capital (WSC), is also progressing with the permitting process for the plant it will establish at the port of Gijón to produce up to 100,000 tonnes of methanol, following an investment of 250 million.

Likewise, Grupo Forestal del Atlántico continues to drive forward a project, representing an outlay of 186 million, to build a facility with an annual capacity of up to 52,000 tonnes of green methanol at its terminal facilities in Mugardos, at the port of Ferrol.

Avalon Renovables is also pursuing the development and construction of a plant to produce 350,000 tonnes per year

X-Press vessel Eco Ponente at the port of Gijón.



Launch of Murelol's Bahía Candela at Astilleros Murueta.



of e-methanol in the vicinity of the Bay of Huelva.

### Grupo JSV

For its part, in the development of methanol as a maritime fuel on Spanish routes, Grupo JSV will position itself at the forefront of sustainability with the acquisition of two new-generation container ships to reinforce its express service between the mainland and the Canary Islands from the second quarter of this year.

The company, founded in 1994 by Antonio Herzog, will invest close to €76 million to add the vessels *Miranda Green* and *Mila Green*, both units with a nominal capacity of 1,200 TEU. With these ships, it will reduce CO2 emissions by up to 70 per cent through their dual-fuel combustion system prepared for methanol.

At the same time, X-Press Feeders, one of the pioneer shipping lines to back green methanol on its European routes, has added the container ship *Eco Ponente*, with a capacity of 1,264 TEU, to its connection between the ports of Rotterdam, Bilbao and Gijón.



The Singapore-headquartered shipping line launched in 2024 one of Europe's first routes using green methanol, linking the ports of Rotterdam and Antwerp with the Finnish ports of Hamina/Kotka and Helsinki, the Lithuanian port of

### MURELOIL'S NEW FLEET CAN SUPPLY GREEN METHANOL



Klaipėda, the Latvian port of Riga and the Estonian port of Tallinn.

This milestone began with the entry into service of the container ship *Eco Maestro*, the first of 14 vessels ordered with dual engines to use green methanol. Subsequently, X-Press reinforced the Green Baltic route with the arrival of the vessels *Eco Levant*, *Eco Umande*, *Eco Ponente*, *Eco Zephyr*, among others. All of them were built at Chinese shipyards and have capacities of up to 1,264 TEU.

For its part, Maersk this year received the sixth and final container ship in the *Equinox Mk-II* series, with a capacity of 17,480 TEU and dual-fuel methanol propulsion. *Barcelona Maersk*, built at HD Hyundai Heavy Industries' Ulsan shipyard in South Korea, joins the Danish shipowner's fleet of 19 container ships capable of sailing on methanol. This decarbonisation initiative forms part of its objective of achieving net-zero emissions by 2040.

Image of the new vessel Barcelona Maersk.+

### Mureloil

Meanwhile, Mureloil will bring into service this year the vessels *Bahía Candela* and *Bahía Beatriz*, built at Astilleros Murueta and chartered by Repsol. These two new units of the bunkering company, which forms part of the Naviera Murueta group, are prepared for the transport and supply of renewable fuels such as HVO, FAME (biodiesel), green methanol and biofuels.

Mureloil also operates in the Bay of Algeciras, in collaboration with Moeve, to supply second-generation biofuels and conventional fuels, through the vessel *Bahía Levante*.

In recent months, Mureloil also signed a newbuilding contract with Astilleros Murueta for fuel supply operations in Portuguese waters. This vessel, like the shipping line's previous three, will also be hybrid, with a mixed system combining diesel-electric generators for propulsion and batteries for auxiliary services.



View of one of Barcelona's vehicle terminals, which heads the ranking.

TRAFFIC IN SPANISH PORTS | VEHICLES

# FOOT OFF THE BRAKE

VEHICLE TRAFFIC GREW BY 6% IN 2025, BUT STILL REMAINS 10% BELOW PRE-PANDEMIC LEVELS

Spanish ports completed in 2025 the recovery of vehicles handled as cargo that had been lost a year earlier. The port system closed last year with traffic of 3.7 million vehicles, representing an increase of 6 per cent compared with 2024, a year that had recorded a 6 per cent decline.

Despite this growth, the figures still stand 10 per cent below pre-pandemic levels, a faithful reflection of the crisis affecting the automotive sector, with several fronts still open, such as the adaptation of factories to new electrified models.

The increase in traffic contrasts with the decline in vehicle production in Spain, due, among other factors, to weaker demand from the main European markets and Brussels' demanding climate roadmap, according to the Spanish Association of Automobile and Truck Manufacturers (Anfac).

As things stand, the increase in volumes handled by Spanish ports is explained mainly by the rise in imports and transhipment traffic, rather than by overseas sales. In fact, according to data

from Anfac, exported vehicles slumped by 8.2 per cent, to a volume of 1.95 million units.

By export destination, the share of vehicles shipped to Europe accounted for 92.6 per cent of total exports during the year, 0.5 percentage points less than in the same period of 2024. Africa and Asia, for their part, increased their demand during 2025 to account for 2.6 per cent and 1.7 per cent, respectively.

### Barcelona, at the top

At the top of the Spanish port system ranking stands Barcelona, which closed 2025 with traffic of 717,000 units, representing an increase of 5 per cent. In this case, the rise in imports stands out, reaching 44 per cent, according to the port authority. In the case of electric vehicles, these already account for close to 12 per cent of the total number of new vehicles passing through the port of Barcelona, and they posted an increase of 75.7 per cent compared with the previous year. In addition, Japanese shipping line

### IMPORTS AND TRANSIT DRIVE CAR TRAFFIC

### NO CHANGES IN THE 'TOP 3'

Barcelona, Vigo and Valencia repeated the 2024 podium. The ranking also highlights the progress made by Málaga (+35%), Las Palmas (+29%) and Tenerife (+29%).

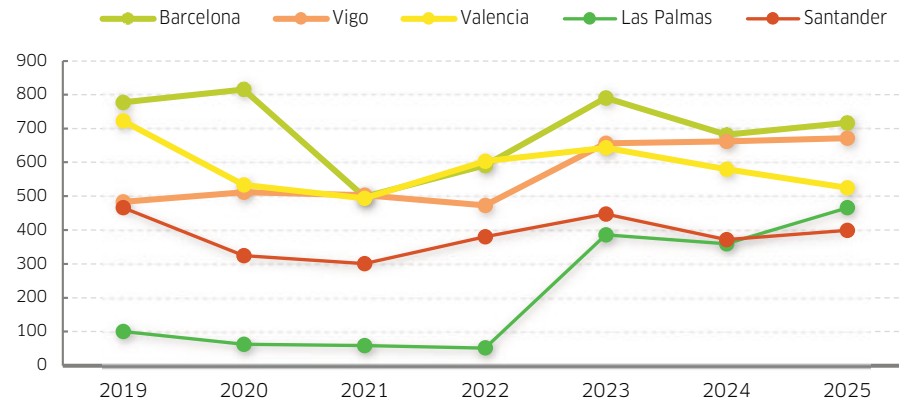
	2025	%25/24	%25/19	2024	2023
Barcelona	717	+5%	-8%	682	790
Vigo	672	+2%	+39%	661	656
Valencia	524	-10%	-27%	580	643
Las Palmas	466	+29%	+362%	360	386
Santander	399	+7%	-14%	372	447
Tarragona	216	-2%	+2%	222	219
Pasaia	212	-13%	-23%	242	287
Baleares	141	+1%	-23%	140	135
Málaga	127	+35%	+66%	94	68
S.C. Tenerife	112	+29%	+34%	87	88
Other	106	+21%	-86%	88	174
<b>TOTAL</b>	<b>3,754</b>	<b>+6%</b>	<b>-10%</b>	<b>3,557</b>	<b>3,913</b>

Thousands of vehicles in goods regime. 2025, preliminary. Source: Puertos del Estado.

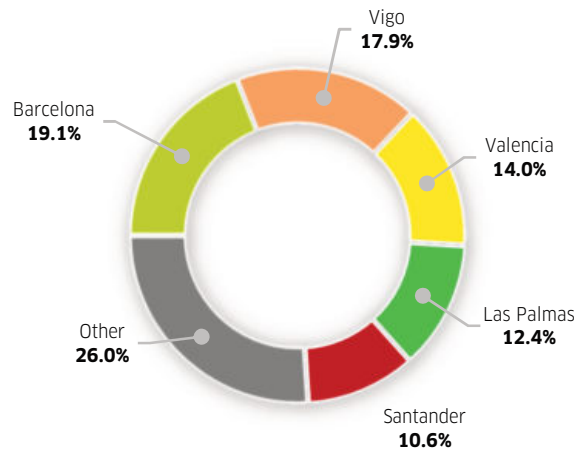


### TRUE DEALERSHIPS

The five leading vehicle ports handled almost 2.78 million vehicles last year, representing 74% of the total traffic of this type managed by the national port system as a whole.



### YEAR 2025



Thousands of vehicles in goods regime. 2025, preliminary. Source: Puertos del Estado.

NYK, one of the most important in the world and with the second-largest fleet of vessels dedicated to vehicle transport, won the tender for the concession of the port area's third vehicle terminal for a period of 27 years. NYK will invest €75 million in the construction of the new public facility, which will occupy 101,058 square metres at the Príncipe de España quay. The new terminal will generate traffic of almost 180,000 vehicles per year, mainly electric vehicle imports, from 2028 onwards. This represents around one quarter of the total vehicle traffic recorded by the port area in 2024.

Next comes Vigo, which handled more than 672,000 cars in 2025, with growth of 2 per cent; the highest vehicle traffic in its history, with Stellantis Group as its main customer. Completing the podium is the Port Authority of Valencia, with 524,000 vehicles handled, representing a decline of 10 per cent. The drop reflects, on the one hand, lower national vehicle production in 2025. On the other, it reflects the direct impact of the lower level of activity expected at Ford Almusafes, one of the main traffic generators for the port, together with a possible redistribution of flows towards other enclaves.



TRAFFIC IN SPANISH PORTS | VEHICLES

# ALL CARS ON BOARD!

MARITIME TRANSPORT REMAINS THE MOST USED MODE BY VEHICLE MANUFACTURERS, WHO GIVE SPANISH PORTS' LOGISTICS SERVICES A GOOD RATING

With a share close to 52 per cent, maritime transport remains the mode most used by vehicle manufacturers for their import and export flows. This is despite the fact that Spanish ports reduced their handled volumes by 9.4 per cent in 2024, with traffic amounting to 2.48 million units. This decline is due, on the one hand, to the strong boost in maritime vehicle traffic to Spain during 2023, when the country acted as a logistics hub amid supply-chain difficulties, a momentum that eased in 2024. On the other hand, the fall in production and, consequently, in exports of vehicles manufactured in Spain also ended up taking its toll.

This is reflected in the latest sector report on the "Assessment of maritime-port logistics", prepared by the Spanish Association of Automobile and Truck Manufacturers (Anfac).

The report focuses on the eight main Spanish ports for vehicle imports and exports —Barcelona, Málaga, Pasaia, Sagunto, Santander, Tarragona, Valencia and Vigo— incorporating the assessment by Anfac member companies of the logistics services at those docks. Specifically, the indicators were compiled from a questionnaire answered by 24 manufacturers belonging to the Spanish trade association.

One of the report's main takeaways is that the average rating of Spanish ports stands at 3.9 out of 5, identical to the score obtained a year earlier, reflecting that saturation problems persist, albeit with somewhat less pressure than in previous years.

The customs procedures indicator, with 4.4 points out of 5, was the highest-rated aspect in 2024, highlighting the agility introduced by customs authorities in key locations for the sector.

Manufacturers also note continued improvement in accessibility, both by road and by rail, with their ratings increasing by 0.2 and 0.3 points respectively to reach scores of 4.3 and 4.0. Even so, the industry remains concerned about the impact of rail access improvement works on regular traffic, as these entail changes and restrictions.

In addition, truck loading and unloading remains the highest-rated aspect within vehicle handling. Although the report reveals a decline of one tenth of a point, it still scores 4.2 out of 5. This is followed by handling in storage areas with 4.0 points, train loading and unloading with 3.8 points, and ship loading and unloading with 3.6 points. Within ship loading and unloading, the report highlights the major differences in ratings among the ports ana-

lysed. This aspect is highly relevant for brands because of its impact on vehicle incidents, underlining the need to continue advancing in the training of workers involved in operations in order to achieve the ultimate goal of zero incidents.

At the same time, manufacturers stress the need to continue promoting rail connectivity at ports and improving the management of rail terminals within the ports. They also urge further progress in digitalisation, as well as efforts to minimise incidents in vehicle handling.

In 2024, the Port of Tarragona once again led the port rating ranking with a score of 4.5 points out of 5. At this port area, vehicle imports play a major role, accounting for 75.1 per cent of transported traffic, 5.6 percentage points more than the previous year. Of the remaining traffic, 24.1 per cent corresponds to export traffic and 0.8 per cent to vehicles shipped to the Balearic Islands. In terms of intermodality, in 2024 rail continued to be the most used mode for export traffic, having risen to represent 81.3 per cent of exported volume, while for imports, road transport accounted for all imported vehicles.

In second place remains the Port Authority of Santander, with 4.4 points out of 5. In 2024, the port handled close to 316,000 units. As for the destination of vehicle movements, 59.4 per cent were devoted to



Spanish ports handled close to 2.5 million vehicles in 2024.

Automotive traffic at Pasaia Port.



### OVERALL ASSESSMENT WITH NO MAJOR CHANGES

Of the eight ports analysed, Pasaia and Málaga improved manufacturers' ratings in 2024, while Vigo and Barcelona slipped back, and Tarragona, Santander, Sagunto and Valencia maintained the same results as a year earlier.




Source: Anfac Logistics Assessment Questionnaire. Each aspect was rated with a score between 1 and 5 points. Prepared by: Transporte XXI.  
(\*) Ports conditioned in their assessment due to the lack of rail access to vehicle terminals.

export traffic. Import volumes, meanwhile, accounted for 36.8 per cent. The remaining volume, 1.8 per cent, corresponded to movements between the mainland and the islands. In terms of the mode of transport used for arrival at or departure from the port, 77 per cent of exported volume reached the port by rail, while for the distribution of imported vehicles, road haulage predominated with a 91 per cent share. Among the measures under way to boost this traffic is the expansion of the vertical car silo located on the Central Breakwater of Raos. The total area will rise to 320,000 square metres, distributed over four levels.


The facility will make it possible not only to increase the terminal's capacity, but also to improve the management of vehicle flows.

The report also highlights the port of Sagunto, which remains third in the ranking, with an overall "satisfactory" rating of 4.2 points, despite being penalised for not having rail access. Adaptation works for the arrival of the rail connection are still under way. Completion is scheduled for next year, according to port authority sources. Vehicle traffic at the port grew by 10.3 per cent in 2024, reaching a volume of 158,183 units.


## A Different View of Maritime & Port Engineering




Port Design




Dynamic Ship Behaviour




Maritime Traffic




Training Center




Offshore



Safeport





siport21@siport21.es  
www.siport21.com

TRAFFIC IN SPANISH PORTS | SHORT SEA SHIPPING

# SHORT SEA SHIPPING FEELS THE ETS IMPACT

SHORT SEA SHIPPING, INCLUDING CABOTAGE AND BULK, BREAKS THE TREND OF THE PAST 15 YEARS AND FELL 4.6% IN THE FIRST HALF OF 2025, ACCORDING TO THE SPC-SPAIN OBSERVATORY

Short sea shipping (SSS) has felt the impact of the entry into force of the EU environmental ETS directive to the point that it marks a turning point in the sustained growth these flows had maintained over the past 15 years.

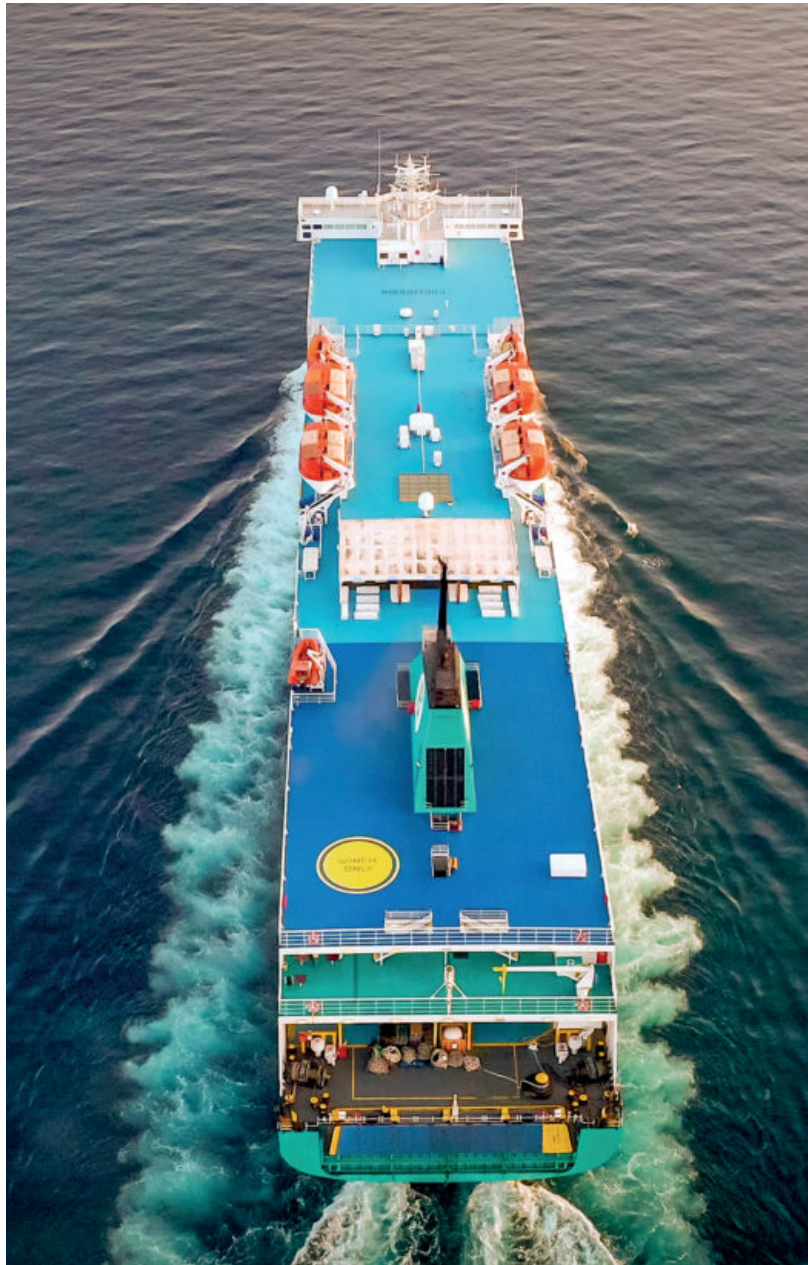
Total SSS traffic, including cabotage and bulk, amounted to 133 million tonnes in the first half of 2025, representing a decline of 4.6 per cent compared with the same period of 2024. "The extra ETS costs are reversing the upward trend that had been recorded since 2010," states the latest Observatory of the Spanish Association for the Promotion of Short Sea Shipping (SPC-Spain) for this period.

Performance was uneven between international and domestic traffic. While international traffic fell by 6.7 per cent, cabotage grew by 4.6 per cent. Ro-ro cargo increased by 2.2 per cent thanks to cabotage, and containerised cargo maintained volumes. Both liquid and dry bulk recorded declines, of 6.9 per cent and 17.3 per cent respectively, due to international traffic.

International SSS ro-ro traffic (excluding vehicles carried as cargo) performed better than the overall market. This type of flow closed the half-year with a volume of 13.5 million tonnes, representing a decline of 1 per cent.

By seaboard, performance was uneven. While the Atlantic seaboard posted a decline of 11.3 per cent over the period analysed, the Mediterranean seaboard, which still accounts for more than 80 per cent of this traffic, maintained volumes (+0.8 per cent).

Ports on Spain's Atlantic arc recorded declines with all



International ro-ro SSS posted a better result than the overall average.



countries, with the exception of the United Kingdom (+9.5 per cent). On the Mediterranean arc, traffic grew with all countries except the Italian market (-9.4 per cent).

Both demand and supply have declined: capacity offered on ro-ro services fell by 5.7 per cent in the first half of 2025 compared with the same period of 2024. On the Atlantic seaboard, the decline was 5.5 per cent, to 1.3 million lane metres. Performance was similar on the Mediterranean seaboard, down 5.8 per cent to 2.7 million lane metres.

In the first half, occupancy improved on both seaboards, with the Mediterranean recording the higher load factor, 83.1 per cent compared with 67.7 per cent in 2024, than the Atlantic (59.3 per cent compared with 53.7 per cent in 2024). This improvement in occupancy is the result of "the significant contraction in supply", the SPC-Spain report states.

Total short sea shipping reached 269 million tonnes in 2024, 3.7 per cent more than in the previous year. The increase was greater in international traffic (4.2 per cent) than in cabotage (2.2 per cent).

By cargo presentation, the best performance was recorded by container traffic (+9.3 per



Finnlines operations at the Port of Bilbao.

### ALMOST TWICE AS MUCH IN THE MEDITERRANEAN

The Mediterranean seaboard has seven motorways of the sea, while the Atlantic is left with three services operating at a minimum frequency of three sailings per week.

ORIGIN/DESTINATION	SHIPOWNER	WEEKLY FREQUENCY
<b>ATLANTIC FRONT</b>		
Santander - Portsmouth/Plymouth	Brittany Ferries	3
Bilbao - Portsmouth/Poole	Brittany Ferries	3
Vigo - St. Nazaire/Tánger Med	Suardiaz	3
<b>MEDITERRANEAN FRONT</b>		
Almería - Nador	Baleària	5
Motril - Tánger Med	Baleària	7
Barcelona - Tánger Med - Génova/Sete	GNV	4
Barcelona - Porto Torres - Civitavecchia	Grimaldi	5
Barcelona - Valencia - Savona - Livorno	Grimaldi	4
Almería - Nador	Trasmediterránea	5
Almería - Orán/Ghazaouet	Trasmediterránea	3

Source: SPC Spain.

cent), while dry bulk fell by 6.6 per cent. Ro-ro cargo carried on international services totalled 25.3 million tonnes last year, representing a decline of 3.7 per cent compared with 2023. As in 2025, performance was uneven between seaboards. While the Atlantic grew by double digits, up 17.8 per cent, the Mediterranean closed the year with a decline of 6.7 per cent.

**SSS  
TOTALLED  
133 MILLION  
TONNES  
DURING  
THE PERIOD**

# BALEARIA

The important thing, always being on time.

**RELIABILITY**

We guarantee compliance with our commitments to our clients thanks to a large and modern fleet.

**SUSTAINABILITY**

We sail using cleaner energy, which allows us to reduce our carbon footprint.

**FLEXIBILITY**

We adapt to the logistical needs of our clients quickly and efficiently.

**DIGITALISATION**

We offer customers greater autonomy, streamlined port operations, and improved logistics planning.

TRAFFIC IN SPANISH PORTS | RO-RO CARGO

# A FLOW THAT REMAINS IN GOOD HEALTH

THE SPANISH PORT SYSTEM INCREASED THESE VOLUMES BY TWO MILLION TONNES IN ONE YEAR

Ro-ro traffic enjoyed better health than the average level of activity at Spanish docks. Rolling cargo reached 74.69 million tonnes of freight in 2025, 2.8 per cent more than in the previous year. This means that these flows have gained two million tonnes in a single year.

There were no changes on the podium. The ports of the Balearic Islands retained the lead with 15.46 million tonnes, growing above the average, up 4.3 per cent. Valencia remained in second place, although its performance was virtually flat (+0.2 per cent), handling a total of 13.76 million tonnes in ro-ro flows. Completing the po-

dium was the Bay of Algeciras, which almost doubled the average growth rate with an increase of 5.4 per cent, to 12.58 million tonnes.

Spanish ports continue their efforts to improve and strengthen their services and infrastructure in order to attract more ro-ro traffic. One example is the port of Huelva, which since last autumn has had a new double ro-ro ramp for ferry berthing at the South Quay. This infrastructure “will make it possible to increase the movement of general cargo exports and imports through rolling cargo,” the Port Authority said in a statement. These facilities enable the simultaneous

## DOUBLE RO-RO RAMP AT THE PORT OF HUELVA

### DOUBLE DIGITS ABOVE 2019

The port system has added almost 9 million more tonnes (+13.5%) since pre-pandemic activity: the 65.7 million tonnes it handled in 2019.

	2025	%25/24	%25/19	2024	2023
Balears	15,469	+4%	+13%	14,838	13,990
Valencia	13,761	+0%	+9%	13,730	13,285
Algeciras	12,580	+5%	+39%	11,939	13,514
Barcelona	11,774	+1%	+2%	11,670	11,569
Las Palmas	5,843	+12%	+31%	5,203	4,844
S.C. Tenerife	4,707	+2%	+16%	4,622	4,339
Santander	2,167	-6%	-1%	2,308	2,364
Vigo	1,383	-13%	+23%	1,599	1,300
Bilbao	1,187	-2%	+41%	1,216	951
Almería	1,026	+17%	+58%	877	779
Cádiz	929	+1%	+8%	924	820
Huelva	605	+3%	+39%	587	650
Ceuta	604	+4%	-27%	583	531
Pasaia	537	-7%	-20%	577	656
Melilla	462	+2%	-36%	454	452
Málaga	455	-5%	-21%	477	675
Motril	426	-13%	-34%	492	476
Tarragona	329	+1%	+8%	328	334
Vilagarcía	170	-	-	-	-
Sevilla	168	-2%	+5%	172	175
Alicante	87	+120%	+208%	40	22
Other	20	-54%	-95%	44	180
<b>TOTAL</b>	<b>74,693</b>	<b>+3%</b>	<b>+14%</b>	<b>72,679</b>	<b>71,907</b>

Thousand tonnes. 2025, preliminary. Source: Puertos del Estado.

operation of four vessels.

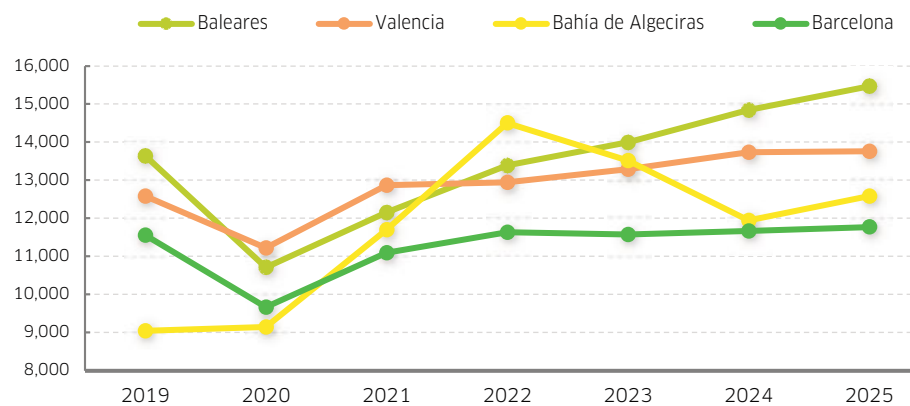
The works have involved an investment, with European funding, of 19.4 mil-

lion. For its part, the Port Authority of Valencia announced at the end of last year that it will modify its



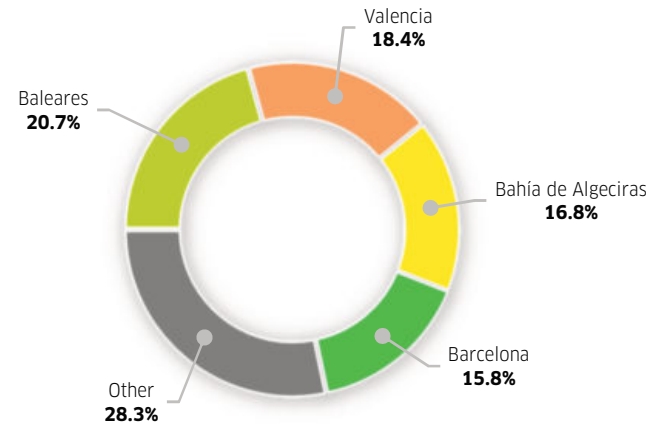
### A 40% SHARE FOR THE TOP THREE

Four out of every 10 tonnes of rolling cargo captured by the Spanish port system pass through one of the three ports that lead the ranking for this type of flow: the ports of the Balearic Islands, Valencia and the Bay of Algeciras, which together account for 41.8% of the total.



Thousand tonnes. 2025, preliminary. Source: Puertos del Estado.

YEAR 2025



### ALGECIRAS AND MOTRIL IMPROVE SAFETY

ro-pax traffic area in order to meet the demands of all the shipping lines operating in this segment of activity. To this end, the board of directors has terminated by revocation the concession granted to Puerto Natura, a company formed by Baleària and Global Ports Holdings, which was to build a public terminal in the reclaimed area of Unión Naval Valencia and which had never got under

way. The Port Authority has yet to assess the terminal model it will implement in the new ro-pax area, which will integrate the entire South Quay with the area of the former Unión Naval Valencia shipyard.

The Port of Motril is expanding and modernising its video surveillance systems, with an investment close to €600,000. The initiative seeks to strengthen control over vehicle traffic

and ro-ro cargo. Also in terms of safety, the Port Authority of the Bay of Algeciras is reinforcing ro-ro safety at La Galera Quay and at the port of Tarifa.

To this end, it is installing a more robust light beaconing system on the boarding ramps of the Strait shipping lines, which will make it possible to make current flows more flexible.

**Connecting the world, moving forward with you**

**SUARDIAZ Group**

**ALMERÍA AND CÁDIZ, DOUBLE-DIGIT GROWTH**

Two Andalusian ports, Almería and Cádiz, grew by more than 10%. Almería quintupled the average increase (+16%) and Cádiz quadrupled it (+12%).

	2025	%25/24	%25/19	2024	2023
Baleares	712	+4%	+17%	687	661
Algeciras	529	+4%	+6%	507	460
Valencia	522	+4%	+14%	501	480
Barcelona	428	+0%	+4%	426	413
Las Palmas	356	+6%	+10%	338	336
S.C. Tenerife	303	-1%	-1%	307	310
Almería	55	+16%	+76%	47	40
Santander	47	-12%	+18%	54	57
Bilbao	43	-6%	+44%	46	37
Cádiz	35	+12%	+30%	31	26
Ceuta	33	-2%	-23%	34	32
Huelva	33	+8%	+56%	31	34
Melilla	29	-3%	-33%	30	30
Málaga	22	-10%	-23%	24	37
Motril	19	-7%	-57%	20	19
Vigo	18	-23%	+1%	23	11
Sevilla	9	-1%	+7%	9	9
Vilagarcía	5	-	-	-	-
Pasaia	3	-0%	-41%	3	3
Alicante	2	+395%	+438%	0	1
Ferrol - San Cibrao	0	-38%	-83%	0	0
Other	0	-	-	-	0
<b>TOTAL</b>	<b>3,203</b>	<b>+3%</b>	<b>+9%</b>	<b>3,119</b>	<b>2,997</b>

Thousands of accompanied and unaccompanied mobile units. 2025, preliminary. Source: Puertos del Estado.

**TRAFFIC IN SPANISH PORTS | RO-RO CARGO**

# SEA TRANSPORT CONTINUES TO GAIN GROUND

**INTERMODAL RO-RO TRANSPORT BENEFITS FROM THE RESUMPTION OF TRADE RELATIONS WITH ALGERIA**

Sea transport continues to gain ground in road freight, a flow that benefited from the resumption of trade relations between Spain and Algeria last year. Spanish ports comfortably exceeded three million ITUs: intermodal ro-ro transport totalled 3.20 million ITUs in 2025, 2.7 per cent more than in 2024.

The ports of the Balearic Islands continued to lead the ranking with 711,825 ITUs and growth of 3.6 per cent. Algeciras retained second place with 528,739 ITUs, up 4.2 per cent, while Valencia, in third place, handled 521,565 ITUs (+4.1 per cent).

Flows remain fairly balanced between the accompanied mode (trucks) and the unaccompanied mode (trailers and platforms), although both showed contrasting performances, according to the latest years available in the statistics of public body Puertos del Estado, corresponding to the 2024 financial year.

Of the 3.11 million ITUs moved in 2024, 1.6 million were trucks, 1.3 million corresponded to trailers and platforms, and 265,700 ITUs to other types (tractor units, vans and mafi trailers). This means that the former recorded growth of 26 per cent compared with the previous year, while trailers and platforms fell by 14 per cent.

Both in the Balearic Islands, due to their insular nature, and in Algeciras, because of Strait traffic, there is a clear predominance of the accompanied mode, while in Valencia the unaccompanied mode clearly prevails.

In the case of Strait flows, Algeciras closed the past financial year handling a total of 45,730 trucks, with growth of 5.7 per cent compared with 2024. More than 90 per cent of this traffic was with Tanger Med (43,156 heavy vehicles).

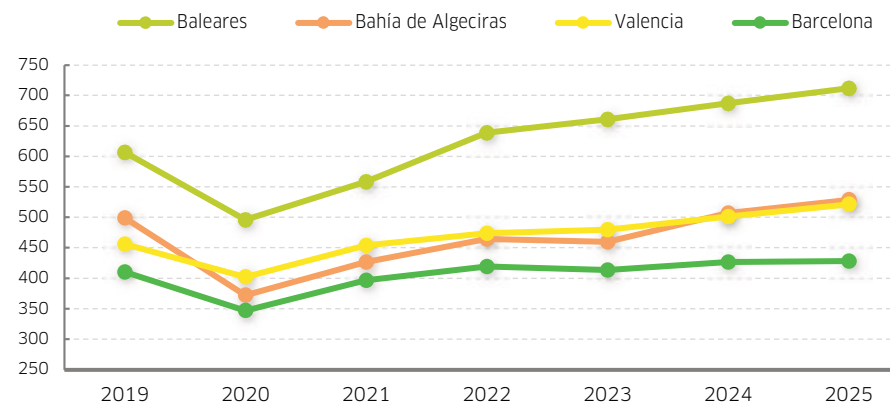
Precisely, the Port Authority of the Bay of Algeciras recently launched a new Unified Road Freight Service (SUMC),

**26%**

**GREW TRUCK SHIPMENTS ON RO-RO SERVICES**

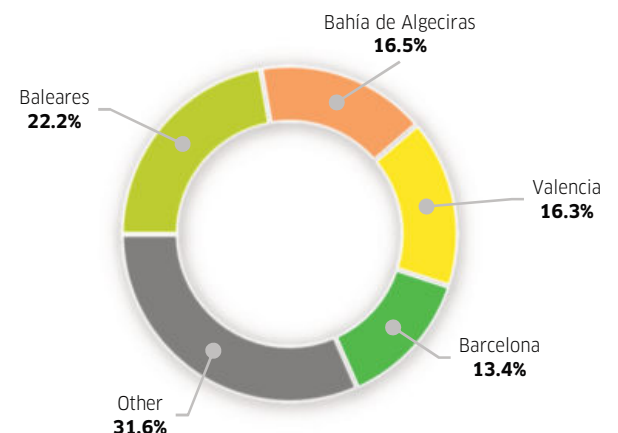
**HIGH CONCENTRATION**

The top three –the Balearic Islands, Algeciras and Valencia– account for a 55% share.



Thousands of accompanied and unaccompanied mobile units. 2025, preliminary. Source: Puertos del Estado.

**YEAR 2025**





Algeciras increased truck traffic on the Strait by 5.7%, more than 90% of it with Tangier Med.

representing a structural change in the management of heavy traffic at Europe's leading port on the Strait. The system centralises access, documentation and boarding procedures through Teleport PCS, the enclave's port community system, and has become the backbone of a strategy that last year incorporated improvements aimed at strengthening control, reducing times and easing congestion generated by the constant flow of trucks between Algeciras and Tangier Med.

Another far from minor development in Strait traffic is the change of ownership of the assets of one of the players in these flows, Armas Trasmediterránea. Denmark's DFDS has taken over the most profitable part of the Strait business, the Algeciras-Ceuta and Algeciras-Tangier Med routes, after acquiring the vessels Volcán de Tama-site and Villa de Agaete, in addition to taking on around 200 Armas Trasmediterránea employees.

For its part, Valencia-based shipping line Baleària will take over the bulk of Armas Trasmediterránea's activities. At the close of this edition, the acquisition was still pending approval by Spain's National Commission on Markets and Competition (CNMC). As far as the Strait is concerned, Baleària adds one vessel and one concession in Algeciras, which are to be integrated into its Tarifa-Tangier line awarded during 2024.



GRIMALDI LINES

The **FIRST GREEN**  
Ro-Ro **OPERATOR** in the **MEDITERRANEAN**

**130** Motorways of the Sea and maritime connections

INFO & RESERVATIONS: +34 96.306.13.00 | info@grimaldilogistica.com | www.grimaldi.napoli.it

**MORE CRUISE SHIPS AS WELL**

Calls grew more than the number of cruise passengers. The Spanish port system recorded a total of 5,373 cruise calls in 2025, that is, 669 more calls (+14%) than in the previous financial year.

	2025		%25/24		%25/19		2024		2023	
	VESSELS	PASSENG.	VESSELS	PASSENG.	VESSELS	PASSENG.	VESSELS	PASSENG.	VESSELS	PASSENG.
Barcelona	894	3,999	+13%	+9%	+12%	+27%	791	3,656	800	3,138
Baleares	791	2,574	+2%	+3%	-4%	-3%	774	2,501	820	2,664
Las Palmas	916	2,090	+25%	+11%	+64%	+41%	735	1,877	560	1,486
S.C. Tenerife	725	1,643	+23%	+25%	+42%	+54%	590	1,319	511	1,067
Valencia	298	799	+12%	+3%	+47%	+83%	267	774	203	436
Cádiz	360	624	+2%	-10%	+14%	+31%	352	696	315	477
Málaga	345	570	+21%	+21%	+20%	+20%	285	470	288	477
A Coruña	184	465	+11%	+14%	+70%	+190%	166	407	108	160
Vigo	124	306	+44%	+45%	+75%	+116%	86	211	71	142
Cartagena	185	258	+27%	+18%	+11%	+3%	146	219	167	250
Alicante	103	252	+3%	+8%	+140%	+300%	100	235	43	63
Bilbao	95	181	+17%	+32%	+90%	+226%	81	137	50	55
Tarragona	63	129	+0%	-5%	+0%	+1%	63	136	63	128
Gijón	32	65	-16%	+45%	+78%	+321%	38	45	18	15
Motril	42	41	+8%	-31%	+31%	+332%	39	59	32	9
Other	216	108	+13%	+3%	+16%	+13%	191	105	187	96
<b>TOTAL</b>	<b>5,373</b>	<b>14,106</b>	<b>+14%</b>	<b>+10%</b>	<b>+27%</b>	<b>+32%</b>	<b>4,704</b>	<b>12,847</b>	<b>4,236</b>	<b>10,665</b>

Number of ships and thousands of passengers. 2025, preliminary. Source: Puertos del Estado.

**TRAFFIC IN SPANISH PORTS | CRUISES**

# WIND IN THE SAILS

**CRUISE ACTIVITY IS IMMUNE TO THE SWINGS AFFECTING OTHER TRAFFIC SEGMENTS AND IS GROWING AT A DOUBLE-DIGIT RATE**

Cruise traffic knows no such thing as sluggishness. Spain once again posted a record number of cruise passengers, surpassing 14 million tourists. Spanish ports closed the past financial year with a total of 14.10 million cruise passengers, 9.8 per cent more than in 2024. This means that the port system gained 1.3 million tourists in a single year. That is 3.5 million more cruise passengers (+33 per cent) than in 2019.

The port of Barcelona remains the undisputed leader, with 3.99 million cruise passengers handled, up 9.8 per cent (27 per cent compared with 2019). In the top five, the per-

formance of the Canary Islands ports stands out, having posted double-digit growth: Las Palmas advanced 11.7 per cent to 2.09 million cruise passengers, while Santa Cruz de Tenerife recorded a sharp increase of 25.2 per cent, reaching 1.64 million tourists. According to the latest report published by the Cruise Lines International Association (CLIA), corresponding to the 2023 financial year, the economic contribution of the cruise sector in Spain amounted to €6.45 billion and supported the creation of 48,900 jobs. At European level, these figures stood at €55 billion and 440,000 jobs.

**PORTS HAVE GAINED 3.5 MILLION CRUISE PASSENGERS SINCE 2019**

**THEY GENERATE AN IMPACT OF €1.236 BILLION IN BARCELONA**

One of the characteristics of this economic impact is its “cross-cutting nature”, benefiting companies and sectors of activity of many different kinds: “From shipyards and their extensive supply chain, to tour operators, including travel agents, agri-food companies, local retailers, restaurants, transport operators and hotels,” the shipping association stresses.

Another study by Puertos del Estado, also corresponding to the 2023 financial year, indicates that since 2009 cruise passenger traffic has increased each year at an average rate of 4.7 per cent. Between 2009 and 2023, passenger volumes doubled, rising from 6 million passengers to 12 million. In addition, the number of calls also increased, from 3,224 in 2009 to 4,501 in 2023.

An analysis with more recent data is a study by the University of Barcelona (UB), commissioned by CLIA and the Port of Barcelona and presented last November. Cruise activity in the Catalan capital had a total direct and indirect economic impact of €1.236 billion in 2024.

Of this figure, direct turnover generated by passengers, shipping lines and crews amounted to €669 million, representing daily spending of €1.8 million. Of that amount, cruise passengers accounted for €445 million (66 per cent of the total), shipping lines generated business volume of €215 million (32 per cent), and crew members spent €9 million.

The remaining 567 million came from indirect and induced impacts.

Cruise activity contributed €707 million to Catalan GDP, generated €317 million in wage income and supported 9,511 jobs.

It also contributed €95 million to public coffers through taxes, according to this analysis.

The dynamism of this traffic in the Spanish port system is reflected in the investments, both public



Las Palmas, one of the ports that has grown the most.

and private, devoted to this activity in recent years.

According to Puertos del Estado’s analysis, public investment in port infrastructure intended exclusively for cruises has amounted to €140 million in recent years, up to 2023.

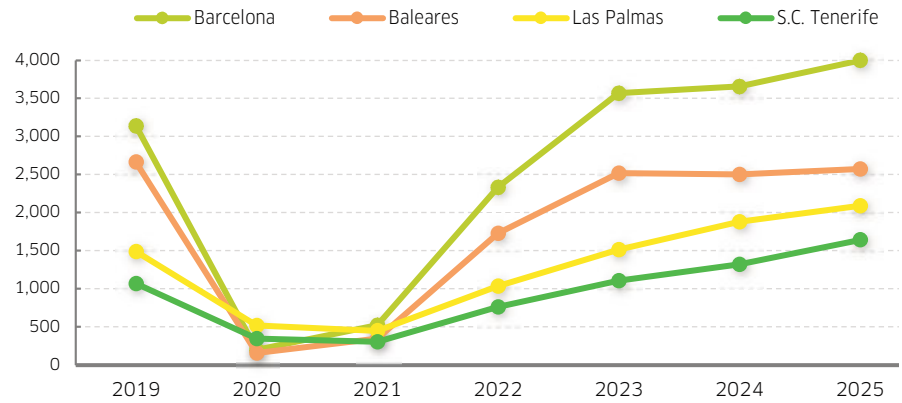
In private initiatives, Catalonia Cruise Terminal G, a joint venture formed by Royal Caribbean Group and Cruise Terminals International, is investing around €80 million in the construction of Terminal G at the Adosat quay in the port of Barcelona, which will be operational in 2027.

Recently, the Port Authority of Ferrol-San Cibrao awarded Global Ports Holding the construction and operation of a cruise terminal in the outer breakwater area of the Galician port. The new cruise terminal at the port of Las Palmas is already a reality. It is a terminal operated by Global Ports Canary Islands, a company controlled by Global Ports Holding, the world’s largest

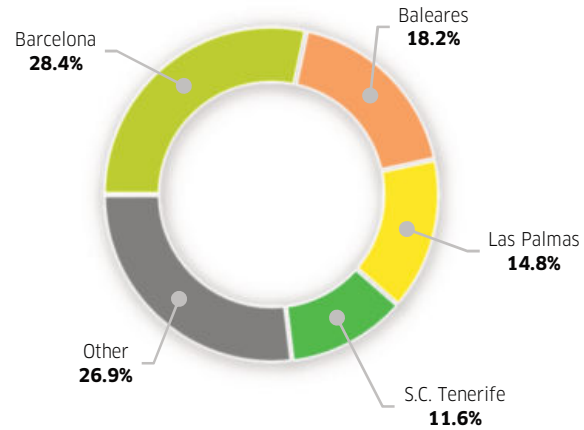


### WINNING BY A LANDSLIDE

The port of Barcelona is the undisputed leader in this activity. With a volume of 3.99 million cruise passengers, it is close to a 30% share (28.34%). The Balearic Islands, in second place, account for ten percentage points less (18.24%).



### YEAR 2025



Thousands of passengers. 2025, preliminary. Source: Puertos del Estado.

cruise terminal operator. The initiative forms part of a global €40 million investment plan being driven by Global Ports Canary Islands to modernise the terminals in Gran Canaria, Lanzarote

and Fuerteventura. Meanwhile, the Port Authority of the Bay of Cádiz put out to tender in November the construction and operation of a cruise terminal at the Reina Sofía quay.

**GNV** Every step of the journey matters

Ferries to: Sicily, Sardinia, Balearic Islands, Tunisia, Morocco, Albania and Algeria

GENOVA

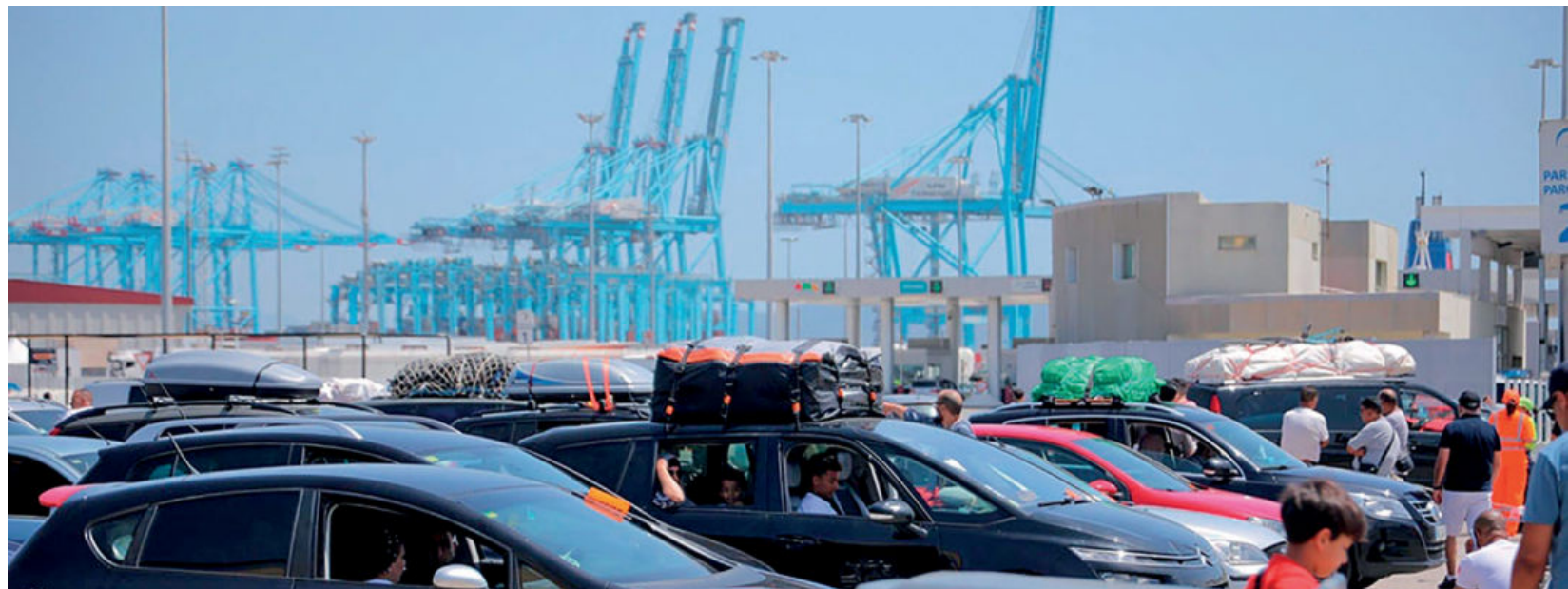
BARCELONA, SÈTE, CIVITAVECCHIA, DURRÈS

TANGER, ALMERIA, MAHÓN, P. TORRES, OLBIA, NAPOLI, BARI

NADOR, VALENCIA, P. DE MALLORCA, ALGERI, BÉJAÏA, PALERMO, T. INERESE

IBIZA, TUNIS

Find out more on our website



Operation Crossing the Strait (OPE) has been in place since 1986.

**TRAFFIC IN SPANISH PORTS | PASSENGERS**

# SUSTAINED ACTIVITY

PASSENGER TRAFFIC CARRIED BY RO-PAX VESSELS FOLLOWED VIRTUALLY THE SAME TREND AS FREIGHT, ALTHOUGH OPERATION CROSSING THE STRAIT ONCE AGAIN SET A RECORD

Passenger traffic in transport services posted performance in line with freight activity, with volumes remaining virtually unchanged. Ro-pax vessels carried a total of 28.40 million passengers last year, representing growth of 1.3 per cent compared with the previous year.

This type of passenger accounts for 68.6 per cent of total passenger traffic, including cruise tourists.

There were no changes on the podium: the leading ports in this type of activity

are the island ports, namely the Balearic Islands, Santa Cruz de Tenerife and Las Palmas, with the exception of the Bay of Algeciras. This is due above all to traffic with Morocco, specifically Operation Crossing the Strait (OPE).

OPE 2025 closed with a total of 3.48 million passengers crossing the Strait

in the largest movement of people between the two continents over a three-month period, from 15 June to 15 September.

“These are the highest figures recorded since Operation Crossing the Strait began almost 40 years ago,” the Ministry of the Interior stressed.

The increase compared with 2024 was 97,002 additional passengers, representing growth of 2.9 per cent compared with the previous year.

The busiest ports were Algeciras, with 977,821 passengers embarking for the African continent, and, on the other side of the Mediterranean, Tangier Med (Morocco), with 736,824 passengers returning to their respective points of origin.

After Algeciras, Tarifa was the Spanish port concentrating the most traffic,

## ABOVE THE AVERAGE

The ports in the top five for these flows grew above the average, except for the Balearic Islands, which recorded a 3% decline.

	2025	%25/24	%25/19	2024	2023
Baleares	7,347	-3%	+7%	7,536	7,419
Algeciras	6,353	+7%	+4%	5,955	5,543
S.C. Tenerife	5,807	+5%	+11%	5,550	5,625
Ceuta	1,996	+3%	-5%	1,940	1,878
Barcelona	1,788	+3%	+20%	1,736	1,735
Las Palmas	1,533	-6%	+1%	1,639	1,671
Almería	878	-10%	-8%	976	834
Valencia	862	+4%	+27%	832	777
Melilla	606	-14%	-28%	703	647
Málaga	366	+1%	-11%	363	352
Santander	222	-4%	+8%	230	229
Motril	198	+11%	-15%	178	191
Alicante	192	+40%	+34%	138	163
Bilbao	157	+8%	+49%	144	122
Huelva	51	-8%	+18%	56	69
Cádiz	45	+12%	+102%	40	26
Other	0	-100%	-	0	0
<b>TOTAL</b>	<b>28,401</b>	<b>+1%</b>	<b>+5%</b>	<b>28,018</b>	<b>27,279</b>

Thousands of passengers. 2025, preliminary. source: Puertos del Estado.

followed by Almería, Motril, Málaga, Alicante and Valencia. The peak day of activity was recorded on 3 August, when total embarkations across all ports reached 52,577 passengers, according to figures from the Ministry of the Interior.

Operation Crossing the Strait 2025 involved 35 vessels operated by Baleària, Armas Trasmediterránea (whose Strait assets have passed to DFDS), DFDS and Grandi Navi Veloci (GNV), providing total transport capacity of 74,032 passengers and 18,547 vehicles per day.

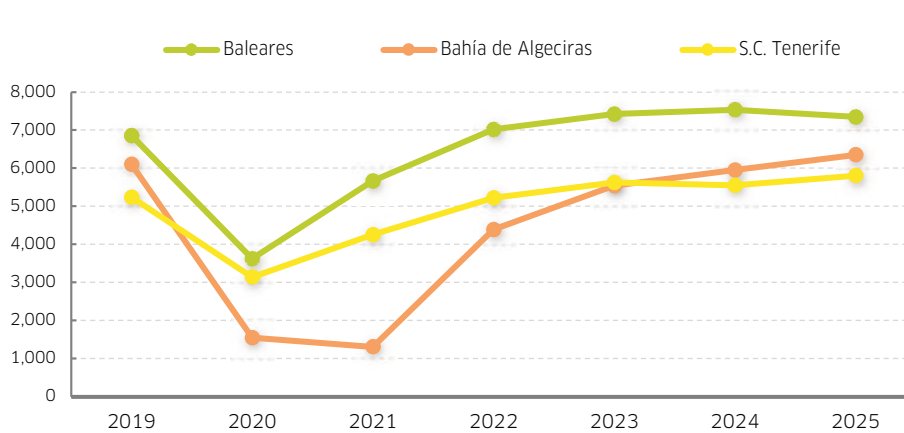
Baleària announced its largest-ever offer of maritime connections for OPE 2025. It offered up to 34 daily connections on the routes involved in the operation: Tarifa-Tangier Ville, Algeciras-Tangier Med, Almería-Nador, Motril-Tangier Med, Málaga-Melilla, Algeciras-Ceuta and Valencia-Mostaganem.

For its part, Grupo Armas Trasmediterránea operated more than 3,200

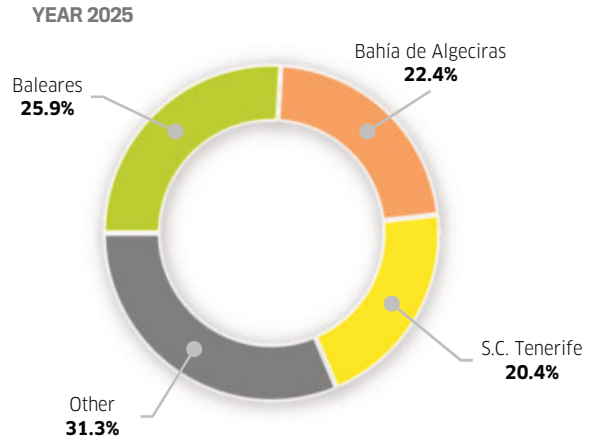
**3.48**  
MILLION  
PASSENGERS  
CROSSED  
THE STRAIT

**A SHARE OF ALMOST 70%**

The top three ports –the Balearic Islands, Algeciras and Santa Cruz de Tenerife– handled 19.49 million passengers, reaching a share of 68.62% of the total.



Thousands of passengers. 2025, preliminary. source: Puertos del Estado.



sailings during Operation Crossing the Strait. It also reinforced the maritime routes linking the ports of Algeciras, Motril and Almería with Ceuta, Melilla, Morocco (Tangier, Nador, Al Hoceima) and Algeria (Oran and Ghazaouet). It offered two

**TRANSPORT CAPACITY STOOD AT 74,032 PLACES PER DAY**

million passenger seats and more than 600,000 vehicle spaces. DFDS, which has added Armas' assets to those it already held from FRS, followed the same path by reinforcing staff and operations.

Finally, Italian shipping line GNV reactivated its

seasonal route between the port of Almería and Nador to strengthen passenger and vehicle mobility between Spain and Morocco during the high season.

Operation Crossing the Strait has been organised since 1986 and manages

the outbound and return transit of citizens of Maghrebi origin travelling from various European countries to North Africa during the summer period. It is the most complex and singular operation taking place between two continents.

## Short sea network

Finlines, the most suitable service for trailers, lorries, container, breakbulk and project cargo.

We offer weekly RoRo connection from Bilbao to: Belgium, UK, Ireland, Sweden, Norway, Finland and Poland.

[finlines.com](http://finlines.com)

a Grimaldi Group company

PROJECT CARGO | SPANISH MARKET

# POSITIVE TREND MODERATES

SPANISH PORTS APPROACH 5.5 MILLION TONNES IN CAPITAL GOODS, WITH IMPORTS FROM CHINA CONTINUING TO GROW AND ALREADY ACCOUNTING FOR 2.2 MILLION TONNES OF TOTAL TRAFFIC

Spain's maritime foreign trade in capital goods through its ports remains in positive territory, although during 2025 growth eased by one point, after posting a 2 per cent increase. According to provisional data handled by the Secretariat of State for Trade, traffic is approaching 5.5 million tonnes in productive assets for industry.

China is maintaining its momentum with 2.25 million tonnes of import-export traffic, 12 per cent more than in the previous financial year, and if this trend continues, it will be ever closer to accounting for as much as 50 per cent of Spain's total flow. Likewise, the continued growth of imports from the Asian

giant, at 2.2 million tonnes, has also meant that Spain has lost its vocation as an exporter of capital goods, which it maintained until 2021, and has instead become an importer.

7.8%

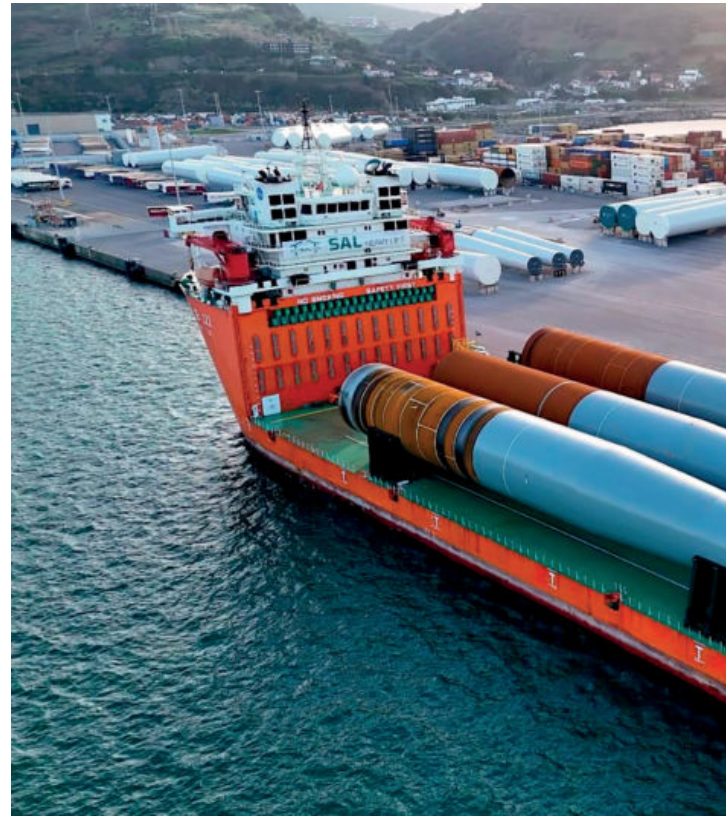
INCREASED  
IMPORT  
TRAFFIC

Morocco, with 439,000 tonnes, has consolidated its position as the second-largest market in the exchange of capital goods, with growth of 8 per cent.

### Heterogeneous

In the current scenario of logistics volatility, geopolitical tensions and cost pressure, Spanish project cargo operators view the 2025 balance positively.

Erhardt Projects highlights heterogeneous behaviour across different markets. "In the Middle East, geopolitical tensions have generated greater uncertainty, affecting both margins and the financial conditions of projects, with longer decision-making processes and greater pressure in terms of risk." By contrast, "in North America we have seen a clear reorientation of investment towards strengthening power generation capacity, especially in the Oil & Gas seg-



Operation involving Haizea wind cargo at the port of Bilbao.

ment," says Erhardt Projects. "In Europe, activity has remained at relatively stable levels. Investment has been more selective, but constant, which has allowed us to maintain sustained participation in the projects in which we operate." Toro y Betolaza stresses that "2025 was

## BESHIP BROKERS

We are a team of 16 professionals dedicated to maritime chartering, offering an efficient, fast and competitive service backed up by our deep market knowledge.

- ⊕ Steel products and Fertilizers
- ⊕ Cereals and Minerals
- ⊕ Solid fuels
- ⊕ Clinker and Cement

Our strategic network allows us to cover a complete range of vessel sizes in all Spanish ports.

 [beshipbrokers.com](https://beshipbrokers.com)



**FEWER OVERSEAS SALES**

Maritime trade in capital goods shows that imports grew by 7.8%, to 3.2 million tonnes, while exports fell by 5.9%, to 2.2 million tonnes.

	2025			TOTAL						
	TOTAL	EXPORT	IMPORT	%25/24	%25/19	2024	2023	2022	2021	2019
China	2,250	41	2,209	+12%	+75%	2,004	1,771	1,884	1,538	1,288
Morocco	439	292	147	+8%	+19%	407	407	380	387	369
U.S.A.	334	289	45	-6%	+1%	357	446	407	433	332
United Kingdom	264	237	28	-22%	+117%	340	321	247	261	122
Türkiye	259	98	160	+10%	+57%	234	231	220	195	164
Germany	125	21	105	+11%	+125%	113	63	66	55	56
India	123	30	93	-9%	+31%	135	124	137	105	94
Mexico	113	108	6	-18%	-39%	139	146	109	100	184
Chile	93	85	8	+14%	-18%	82	75	76	98	113
France	90	78	12	-19%	+245%	111	117	98	94	26
U.A.E.	78	61	18	+25%	-24%	62	53	55	84	102
Egypt	55	51	4	+5%	-14%	53	50	56	56	64
Brazil	54	44	10	+15%	-30%	47	81	78	70	77
Saudi Arabia	54	52	2	-20%	-26%	68	80	67	61	73
South Korea	52	9	43	-39%	-48%	86	62	55	67	100
Taiwan	52	5	47	-0%	-2%	52	51	59	58	53
South Africa	46	29	17	-8%	-41%	49	63	61	59	77
Australia	42	41	1	-13%	+12%	49	40	39	40	38
Israel	40	34	5	+13%	-4%	35	47	46	48	41
Thailand	39	6	33	+16%	-8%	34	32	35	39	43
Algeria	39	39	0	+55%	-45%	25	25	20	42	71
Dominicana Rep.	37	37	0	-8%	+56%	41	41	27	22	24
<b>TOTAL</b>	<b>5,491</b>	<b>2,259</b>	<b>3,232</b>	<b>+2%</b>	<b>+18%</b>	<b>5,399</b>	<b>5,225</b>	<b>5,279</b>	<b>4,911</b>	<b>4,671</b>

Foreign trade in capital good in thousands of tonnes. Source: Datacomex.

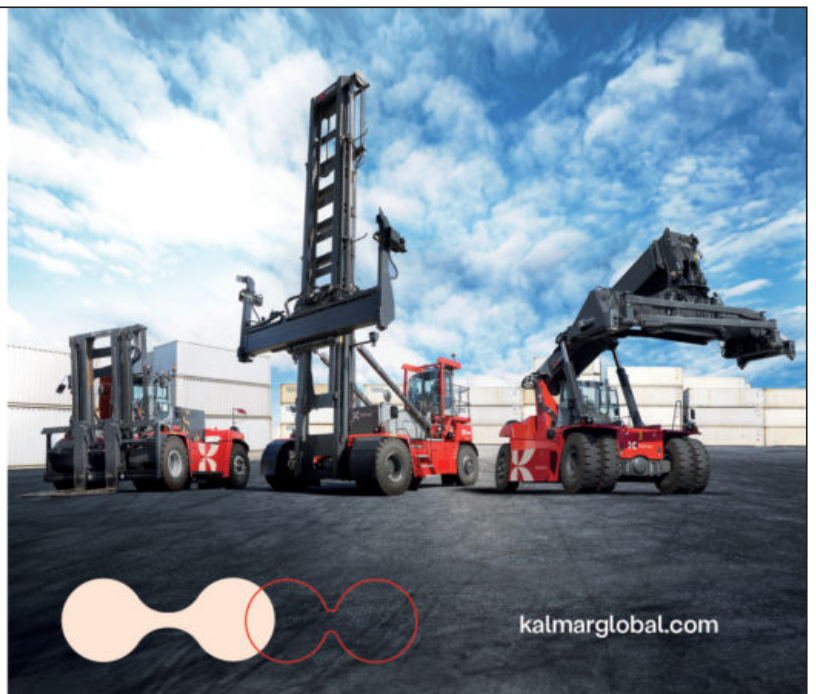
positive in terms of activity, although it was marked by a high degree of operational complexity. The market has maintained a good level of demand, driven mainly by industrial, energy and infrastructure projects." At Lamaignere, they reiterate that "we strengthened our position in sectors

strategic for the company, such as infrastructure and renewable energy." For Cobasa, "the market remained active, but projects prioritised operational reliability, very demanding delivery windows and end-to-end solutions (maritime, port, special transport, storage/assembly)."



**The time is now to go electric**

With a full range of heavy duty forklifts, empty container handlers and reachstackers. Kalmar's electrically powered range of heavy lifters help improve the eco-efficiency of your operations, while maintaining the highest levels of productivity and safety. With a wide range of batteries and lifting solutions. You can lift up to 33 tonnes with our heavy duty electric forklifts, 8 to 11 tonnes with our empty container handlers and 45 tonnes with our electric reachstacker. We will work with you to design a solution that will meet the needs of your company. What are you waiting for?



## PROJECT CARGO | GLOBAL OVERVIEW

# MORE FLEXIBLE

THE RISE IN DEMAND FOR OVERSIZED CARGO IS ALSO CREATING AN OPPORTUNITY FOR THE CONTAINER SHIP AND RO-RO FLEET

The growth of the project cargo fleet was below expectations, with 2.7 million DWT delivered against the 4 million projected, bringing total capacity to close to 64.5 million deadweight tonnes, according to Drewry's latest estimates.

Cobasa shares the view that "available capacity is not excessive. There is still pressure on the availability of multipurpose/heavy-lift vessels, which forces us to work further in advance and with contingency plans, something we have repeatedly experienced this year".

Among the shipping lines expanding capacity is JSI Alliance, which last year opened an office in Bilbao and is reinforcing its fleet with five new vessels under the Orca programme. This initiative has wind turbine manufacturer Siemens Gamesa Renewable Energy as its main customer for the transport of XXL wind turbines.

Shipowner Briese Schifffahrt also has an initial order under way for fifteen 'LakerMax' vessels, of which eleven have already been delivered since 2024. In addition, it has added another six vessels on firm order, plus options for six more vessels of this type. Deliveries are scheduled for 2028 and 2029.

Container ships, meanwhile, are also carrying more and more project cargo, in-

# 64.5

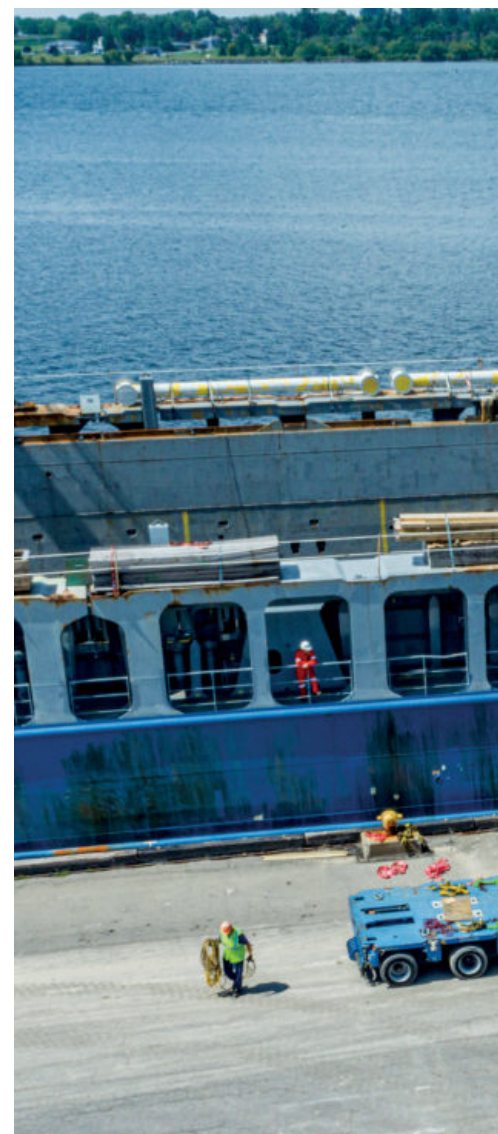
MILLION DWT  
IN THE  
PROJECT CARGO  
FLEET

cluding oversized, heavy and high-value components traditionally associated with breakbulk or heavy-lift vessels. The growing modularisation of industrial and energy projects is making this cargo more compatible with containers.

According to Rafael Vicens, Director of Maersk Project Logistics IMEA, "globally, around 20 per cent of project cargo is currently transported on container ships". In this respect, the sector notes that out-of-gauge (OOG) containers for special cargo recorded a compound annual growth rate of more than 20 per cent between 2020 and 2024.

The advantages of shipping project cargo in containers include fast transit times, reliable sailing schedules, high service frequency, economies of scale that reduce transport costs, and broad geographic coverage. At destination, it also benefits from an agile and highly optimised process for unloading containers, together with inland connectivity. All of this provides greater flexibility and lower risk.

Likewise, ro-ro transport is evolving, with operators introducing larger and more versatile vessels capable of carrying mixed cargoes, including breakbulk and heavy equipment. The development of ro-ro fleet capacity is running at double-



## PortCastelló 2025-2030: Logistics leadership and energy transformation

The Port Authority of Castellón has drawn up its **Strategic Plan 2025-2030**, a project for the future to consolidate itself as the logistics platform of reference for the Mediterranean Arc.

With public investment of **366 million euros**, complemented by a further **300 million of private capital**, the port is committed to modernisation and operational efficiency in order to meet the needs of the province's industrial base.

The most critical asset of this growth is the **South Dock**. PortCastelló will be positioned as the enclave with the largest area available to host new-economy projects, including **green hydrogen, biofuels and offshore wind**. This energy boost aims to diversify traffic and reach the target of **30 million tonnes by 2030**.

Competitiveness will be enhanced by the completion of the **southern rail access**

and the new **intermodal station**. These infrastructures will connect directly to the Mediterranean Corridor, optimising the ceramics supply chain and reducing the carbon footprint.

Finally, the transformation to **100% electronic administration** and the use of Big Data will guarantee agile vessel call management, eliminating unnecessary bureaucratic burdens for the business.





Loading of a transformer in the United States.


## THE RO-RO SECTOR IS GROWING WITH SPECIAL CARGO

digit rates. The global fleet of Pure Car Carriers (PCC) and Pure Car and Truck Carriers (PCTC) is expected to expand by around 40 per cent in the coming years, with new vessels significantly larger than the ships they replace. Grimaldi, Höegh Autoliners and Glovis, among others, are driving this development.

Other shipping lines are also expanding assets. LD Armateurs, for example, is adding three new ro-ro vessels chartered for Airbus: Spirit of Toulouse, recently launched, to be followed by Spirit of Mobile and Spirit of Mirabel.

This ro-ro momentum in project cargo is also extending to port terminals. Intermodal Sea Solutions (ISS), which in 2025 handled a total of 250,000 tonnes of rolling cargo at the port of Santander, mainly linked to construction materials, steel products and project cargo, has established operations in Vigo to replicate the same model.

ISS has regular cooperation agreements with UECC, CLdN, Brittany Ferries, WalSol and Seacargo for exports to the United Kingdom, Ireland, the Netherlands, Germany, Scandinavia and the Baltic countries.

  
**Puerto de Avilés**  
Autoridad Portuaria de Avilés

[www.puertoaviles.es](http://www.puertoaviles.es)

We connect Asturias' industry with the world

PROJECT CARGO | GLOBAL OVERVIEW

# FOCUSING ON ENERGY

PROJECTS LINKED TO RENEWABLES AND TO EXPANDING SUPPLY CAPACITY ARE GAINING WEIGHT

“The energy transition, data centres, grid reinforcement and the need to guarantee security of supply are driving large-scale projects in multiple markets, which will foreseeably increase demand for specialised project cargo services,” Erhardt Projects points out.

“Another sector with strong growth potential is defence, reflected in rising military spending in numerous countries, together with international deployments and programmes to modernise strategic infrastructure,” the same operator adds. “At the same time, we expect projects linked to traditional energy infrastructure, including Oil & Gas in certain regions,

and to new energy sources, to continue developing,” Erhardt Projects notes.

Toro y Betolaza highlights that “the sectors that will continue to drive demand will mainly be renewable energy, especially wind power and projects linked to the energy transition; industry and infrastructure, with investments in modernisation and capacity expansion; and capital goods and heavy industry, where tailor-made logistics are critical.”

Cobasa and Lamaignere stress that “infrastructure and renewable energy will continue to be the engines of project cargo.”

### India and Mercosur

The operators consulted also agree that the European Union’s trade agreements with India and Mercosur represent a clear strategic opportunity for the project cargo sector. Through them, they stress, the exchange of machinery, industrial equipment and large-scale projects is facilitated, especially in markets with strong growth potential.

“India and Mercosur can become significant centres of demand, but it is important to understand that this is not only about greater volume, but about complex projects that require local knowledge, management and risk control,” Toro y Betolaza points out. It therefore underlines that “for well-positioned companies, these agreements open the door to stable, long-term commercial relationships. In our case, this vision is reinforced by the commitment to TyBaris Comercio Exterior y Aduanas.”

Lamaignere also stresses that “the countries included in these agreements will receive more cargo and will therefore become preferred destinations for the sector.”

Artificial intelligence is entering the project cargo sector progressively. “Above all in planning, safety and maintenance, although unevenly depending on the size of the operator and its level of digital development,” Cobasa explains.

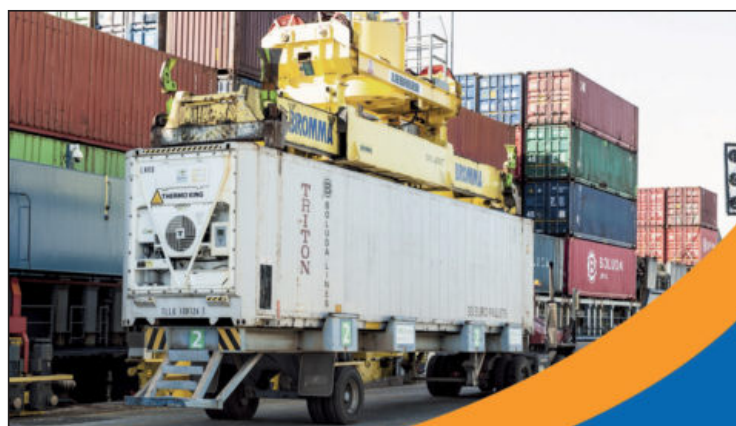
“Its greatest contribution today is to improve decision-making, optimise processes and help anticipate incidents,” Toro y Betolaza points out. In its view, “AI does not replace human experience, but acts as a powerful complement to improve efficiency, anticipation and control.”

Erhardt Projects notes that “a large part of project cargo clients are engineering firms and large companies, which are already adopting AI. Our sector must there-



**SPECIALISED SERVICES ARE INCREASING**

**ENVIRONMENTAL REGULATION IS CHANGING OPERATIONS**





**ALICANTE PORT**  
Autoridad Portuaria de Alicante

- Fast and competitive
- Specialised and connected
- Partner of the Alicante fruit and vegetable sector



**ALICANTE, YOUR MEDITERRANEAN HUB FOR INTERNATIONAL TRADE**

fore inevitably integrate with their processes.”

“Clients are demanding greater speed, accuracy and visibility in logistics, goals that AI facilitates through route analysis, problem prediction, document management and multimodal coordination,” the operator stresses.

At Lamaignere, they indicate that “project cargo is not immune to advances in technology and to AI in particular. Little by little, tools are emerging that are very useful for load forecasting, simulations or



ERHARDT PROJECTS

Project cargo handled by Erhardt Projects in the UAE.

preliminary studies. Even so, expert human supervision is always required, because we are dealing with very delicate cargoes.”

**Environmental regulation**

Moreover, “uncertainty in global environmental regulation, combined with the tightening of rules in the EU, is directly affecting how we plan and execute projects,” Erhardt Projects states. In its view,

“on the one hand, it forces companies to be far more cautious and to anticipate possible regulatory changes that may affect routes, transport modes or permits.” And, on the other hand, “it drives the incorporation of more sustainable solutions from the outset of the project: route optimisation, selection of less polluting transport or more precise emissions control,” Erhardt details. In practice, this means

“that lead times, costs and coordination with clients and authorities require greater foresight.”

Cobasa and Toro y Betolaza underline that “the coexistence of more demanding environmental regulation in the EU with greater uncertainty at global level creates a scenario of operational uncertainty and competitive asymmetries.” This scenario, according to Toro y Betolaza, “forces European companies to make significant investments in adaptation and regulatory compliance.” The same operator argues that “sustainability must be a strategic pillar, but it is essential that regulation be applied progressively, coherently and in a coordinated way, allowing companies to plan and adapt without putting competitiveness or the continuity of projects at risk.”

Cobasa concludes that “for project cargo, the key lies in focusing on efficiency in order to reduce waiting times and manoeuvres, as well as modal coordination.”

**Atlantic leader**  
in multimodal logistics



**Port of Vigo**











**Specialised in high value general cargo**

> 90 maritime services • automotive • granite • fishing • metals • aluminium • fruit • project cargo

INTERMODAL | RAIL-PORT TRAFFIC

# RAIL LOOKS TO THE SEA, BUT RUNS LITTLE ON LAND

PORTS CHANNEL MORE THAN HALF OF SPAIN'S RAIL FREIGHT TRAFFIC, BUT TRUCKS STILL ACCOUNT FOR 95% OF INLAND CARGO

## OVERWHELMING DOMINANCE OF THE ROAD

Trucks move 95% of the goods entering or leaving ports by land, compared with rail's 5% share, reflecting rail's strong development potential.

	RAILWAY	ROAD	TOTAL CARGO	RAILWAY SHARE	ROAD SHARE
Barcelona	3,596	37,136	40,732	9%	91%
Valencia	2,987	41,178	44,165	7%	93%
Bilbao	1,249	14,608	15,857	8%	92%
Santander	966	5,795	6,761	14%	86%
Gijón	578	5,461	6,039	10%	90%
Tarragona	511	9,199	9,710	5%	95%
Huelva	355	6,707	7,062	5%	95%
Marín - Pontevedra	353	2,184	2,537	14%	86%
Pasaia	193	3,143	3,336	6%	94%
A Coruña	193	4,399	4,592	4%	96%
Algeciras	192	17,335	17,527	1%	99%
Cádiz	148	3,666	3,814	4%	96%
Sevilla	138	4,102	4,239	3%	97%
Avilés	68	3,184	3,252	2%	98%
Alicante	41	3,036	3,077	1%	99%
Vigo	-	4,833	4,833	-	100%
Almería	-	4,876	4,876	-	100%
Baleares	-	15,286	15,286	-	100%
Cartagena	-	10,187	10,187	-	100%
Castellón	-	8,874	8,874	-	100%
Ceuta	-	1,191	1,191	-	100%
Ferrol-San Cibrao	-	1,561	1,561	-	100%
Las Palmas	-	14,624	14,624	-	100%
Málaga	-	2,105	2,105	-	100%
Melilla	-	536	536	-	100%
Motril	-	1,569	1,569	-	100%
Santa Cruz de Tenerife	-	8,507	8,507	-	100%
Vilagarcía	-	1,403	1,403	-	100%
<b>TOTAL</b>	<b>11,569</b>	<b>236,684</b>	<b>248,253</b>	<b>5%</b>	<b>95%</b>

Data from 2024. Total cargo does not include inbound and outbound goods moved by pipeline, other means or transhipment. Source: Puertos del Estado.

More than half of rail freight traffic in Spain passes through ports, yet it accounts for barely 5 per cent of the inland cargo entering or leaving docks. The paradox sums up the tug-of-war between rail and road haulage in logistics chains.

In 2024, the last year for which official statistics are available, ports handled 11.6 million tonnes by rail with origin or destination at a port. This figure represents a decline of 5 per cent compared with 2023, a year that had already recorded a 5.4 per cent drop in port-rail traffic.

Against the almost 237 million tonnes moved by truck, rail remains a minority mode, although its intermodal role gains weight year after year.

Data from Puertos del Estado also reveal that rail is used more by importers than by exporters, since 53 per cent of the tonnes are shipped from port terminals for overseas destinations.

Spanish ports serve four major intermodal traffic segments: containers, automobiles, bulk and general cargo, such as steel products, to which semi-trailer

## PORTS HANDLE MORE THAN HALF OF RAIL FREIGHT TRAFFIC



The Port of Marín moves 14% of the inland cargo entering or leaving the enclave by rail.

traffic has now been added thanks to the launch of the rail motorway between Valencia and Madrid, operated by Tramesa and Trans Italia, which have extended the service to Portugal.

### Top 3

The port authorities with the highest volume of rail transport as an access mode to their facilities were Barcelona, Valencia and Bilbao, which together accounted for 67.7 percent of total maritime-rail traffic.

The Port Authority of Barcelona handled 3.6 million tonnes by rail, representing an increase of 7 per cent compared with 2023. Valencia reduced its volume by 5 per cent, to almost 3 million tonnes, while Bilbao recorded a de-



cline of 14 per cent, to 1.2 million tonnes. It is worth noting that Algeciras, the leading port in the Spanish port system with more than 100 million tonnes in total traffic, accounts for barely 1.6 per cent of maritime-rail transport, after a 22 per cent fall in rail volume compared with 2023.

**Atlantic seaboard**

The ports on the Atlantic seaboard, for their part, recorded a significant share of rail transport within total port-rail traffic compared with other Spanish enclaves. Bilbao handled 10.8 per cent of the tonnes of maritime-rail traffic in 2023, followed by Santander (8.3 per cent) and Gijón (5 per cent).

On the other hand, when looking at rail share as a proportion of total inland freight, the ports with the highest ratios are Marín and Santander, at 14 per cent, followed by Gijón (10 per cent), Barcelona (9 per cent) and Bilbao (8 per cent). Year-on-year variations among port authorities were notable. Only two ports in the top five increased their port-rail flows: Barcelona (+7 per

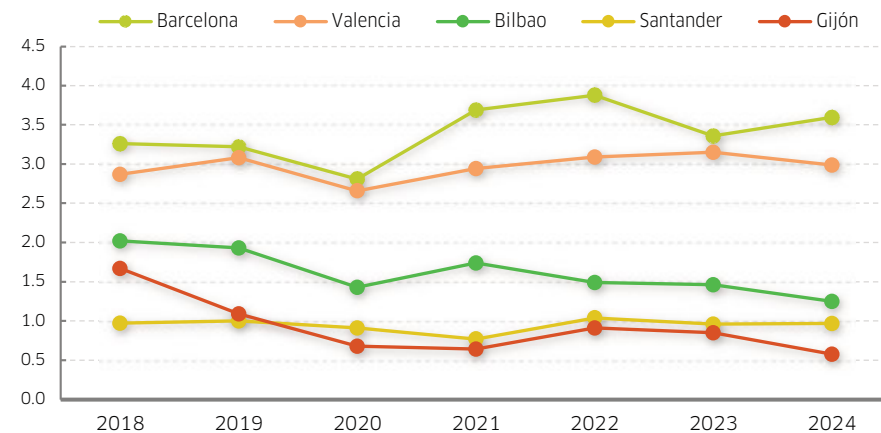
**RAIL'S CHALLENGE REMAINS TO GAIN COMPETITIVENESS**

cent) and Santander (+1 per cent). By contrast, the ports of Valencia, Bilbao and Gijón lost traffic.

Strong cost pressure in the face of intense competition from road haulage, together with the high number of works on the rail network, continues to take its toll on port-rail traffic. Even so, ports maintain their role as genuine intermodal nodes, indispensable for the development of more sustainable and efficient transport. Rail's challenge remains to gain competitiveness against the truck, at a time when congestion and decarbonisation point to rail as logistics' great ally.

**RAIL DOES NOT REACH ALL PORTS**

The top five ports handling the most cargo by rail –Barcelona, Valencia, Bilbao, Santander and Gijón– account for 81% of port-rail traffic, with a volume close to 9.4 million tonnes.



Data in million tonnes. Source: Observatorio del Transporte y la Logística en España (OTLE) with data from Puertos del Estado. Ministry of Transport and Sustainable Mobility.

INTERMODAL | RAIL TERMINALS

# A CROSSROADS BETWEEN RAIL AND PORT

THE LANDSIDE IS ALSO KEY TO PORT TRAFFIC, AND RAIL IS ONE OF ITS MAIN ALLIES, WHICH IS WHY INLAND INTERMODAL TERMINALS ARE GROWING IN IMPORTANCE AS ATTRACTIVE HUBS

Close to 60 per cent of all rail freight traffic in Spain has its origin and/or destination at ports. In this context, Adif is accelerating its roadmap to shape a network of intermodal and logistics terminals on the landside of the system. This network of strategic nodes will concentrate between 80 and 90 per cent of all freight volumes moving through the Spanish rail system.

Most of the projects are backed by European funding and are therefore being executed under the commitment to complete all works by June 2026, as the deadline. However, completion of the works is one thing and the start of operations is another, which in some cases will be postponed until the first half of 2027. Adif's Director of Logistics Services, Luis Vicente Moreno, confirms that all the planned works are already under way and that "although the deadlines are tight, we are going to meet them".

The logistics nodes considered strategic by Adif and their corresponding terminals are those of Barcelona (La Llagosta and the Can Tunis-ZAL Prat complex), Valencia (Fuente San Luis), Madrid (Vicálvaro), Valladolid, Seville (Marabique), Vitoria (Júndiz) and Zaragoza (Plaza). The facilities are designed with large capacity, more than 200,000 ITUs per year per terminal, and with interoper-

able parameters. Total investment for these actions through to 2030 amounts to €360 million. The Zaragoza-Plaza terminal is the only one already adapted to the parameters set by Adif to form part of the network of strategic nodes.

Alternative intermodal nodes to Adif's network include Terminal Marítima de Zaragoza (TMZ), the Coslada dry port, the Azuqueca de Henares dry port (Guadalajara), the Burgos dry port, the Terminal Intermodal de Monzón (TIM), the Terminal de Contenedores de Miranda (TCM) and Athos Rail's intermodal terminal in Fuenlabrada (Madrid), among others. Also about to come into operation are the Salamanca dry port and the inland terminal of the port of Tarragona in Marchamalo (Guadalajara).

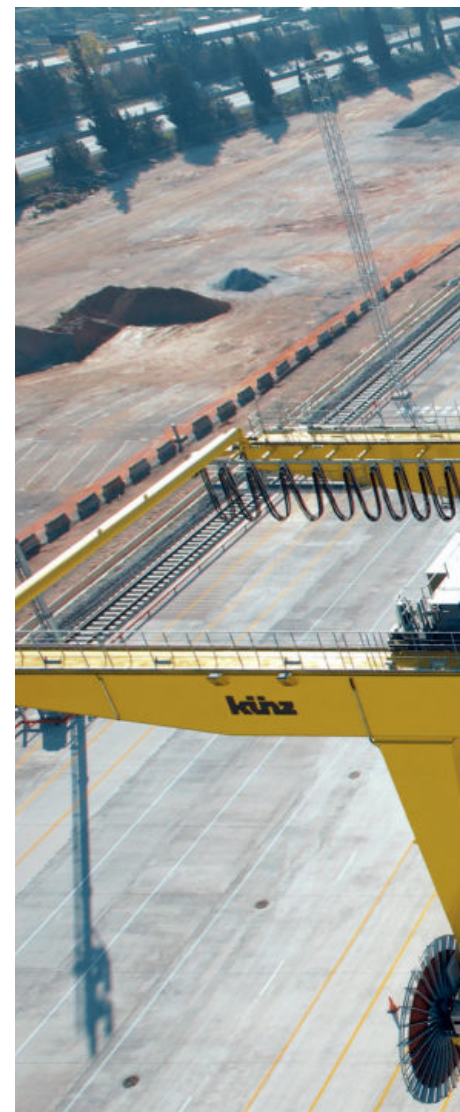
Alberto Milotti, chairman of Europlatforms, recalls that the European Commission requires all member states to carry out a full assessment of the current situation of rail intermodal platforms and to establish their priorities in this area. However, Milotti regrets that Brussels "has not established a common methodology focusing on the most important elements to be analysed". In short, "it is important that we speak the same language, and this will encourage intermodality", he adds.

Tristan Ziegler, Managing Director of Combined Transport at Novatrans-Greenmodal, draws

attention to the need to improve terminals, since "we are talking about doubling rail capacity in the coming years". In this regard, "terminals are not prepared", so "the investment effort being made in rail infrastructure must also be replicated in terminals".

## Sidings

As part of its strategy to boost freight traffic on its network, Adif has embarked on the extension of station sidings to 750 metres. "This initiative increases the operability of rail infrastructure for such traffic, by allowing the parking and crossing of trains of standard interoperable length, compatible with European networks," Adif sources underline. Over the past five years, Adif has mobilised investment of close to 400 million in actions to extend sidings to 750 metres. The



**THE ZARAGOZA-PLAZA NODE IS THE ONLY ONE ALREADY ADAPTED**



Image of Adif's La Llagosta terminal (Barcelona).



Huelva freight transport terminal, owned by Adif.

Spanish rail network currently has 175 operational 750-metre sidings. Adif is carrying out works to extend a further 31 sidings to that length. In addition, contracts have been tendered for the same works on 26 sidings. At the same time, projects are under way for the extension of another 21 sidings. According to Adif's current planning, by 2027 the network will have 253 operational sidings.

Extending the length of sidings to 750 metres "favours train operations and manoeuvres in transit, improves the capacity, efficiency and competitiveness of rail lines, and reduces the external and internal costs of freight transport", the public company stresses.

Many of these actions are being carried out under agreements signed by Adif with Puertos del Estado and port authorities, and are therefore

200.000

ITUS OF ANNUAL CAPACITY WILL HAVE EACH OF THE STRATEGIC NODES BEING PROMOTED BY ADIF

financed through the Port Landside Accessibility Financial Fund, which seeks to promote intermodal freight transport. The actions financed by this Fund also include external rail access to ports.

#### Track gauge

The consultancy Ineco, on the basis of a commission from the Ministry of Transport and Sustainable Mobility, is preparing an assessment of the migration of rail lines to standard European gauge. The results of the

study are expected to be published before the summer of 2026. The EU has established that member states with an existing rail network, or part of one, with a track gauge different from the nominal European standard gauge of 1,435 millimetres, shall carry out an assessment, no later than 19 July 2026, with a view to its possible migration to European gauge and an evaluation of the effects on interoperability. In Spain and Portugal, the rail network gauge is the so-called Iberian gauge (1,668 millimetres).

Following this assessment, the next step would be to establish a migration plan to standard gauge within an additional period of one year. The alternatives would range from undertaking only works already under way to total migration, that is, changing the gauge of the entire network.

INTERMODAL | RAIL MOTORWAYS

# FORGING ALLIANCES WITH THE ROAD

SPANISH PORTS ARE DRIVING RAIL MOTORWAYS AS THE GREAT LEVER FOR TRUCKS AND TRAINS TO SHARE THE ROUTE AND FOR RAIL TO GAIN REAL WEIGHT IN SUPPLY CHAINS

Rail motorways are not born on the track, but at the dock. It is the ports, major freight concentration hubs, that are pushing hardest for a model aimed at reconciling the truck with the train and giving rail the prominence it has resisted for decades in Spain. The road gets on the train because there is cargo that justifies it and nodes capable of organising it.

The rollout of these services comes at a delicate moment for the rail network. Works overlap, capacity suffers and reliability is put to the test. "Rail is going through a do-or-die moment," acknowledges Mar Chao, chairwoman of the Port Authority of Valencia. "We have to get through this teething phase, but when the works are finished we are going to have a much better outlook." From the ports, this toll is accepted with a long-term vision: without rail, there can be no sustainable growth.

The port logic is clear. Rail moves where cargo is concentrated, and that cargo is, for the most part, at maritime enclaves. "Rail operates to a large extent thanks to port cargo. We already have that cargo, but we need to make progress in capacity," says Juan José Aguilar, Head of Operations and Intermodality at the port of Algeciras. Rail motorways thus appear as a natural extension of the dock, a way of taking volume off the asphalt and gaining efficiency over long distances. Around €4.3 billion is planned for intermodality infrastructure, including rail motorways, port-rail connections and multimodal interchanges.

Valencia has been the laboratory. The Valencia-Madrid rail motorway, driven by Transitalia and Tramesa, has shown that the model is viable on Ibe-



TRANSPORTE XXI

Operations on the rail motorway between Valencia and Madrid.

rian gauge when there is a solid traffic base. Every week, dozens of semi-trailers leave the road to board the train, in a service designed for port transport but also open to industrial traffic. "Over long distances, rail is a very clear alternative," says Juan Carlos Arocas, Iberia Managing Director at Transitalia.

The next step has been to cross borders. The extension of the service to Entroncamento, in Portugal, without passing through Madrid and with Medway traction, directly connects two port systems and reinforces the role of the Atlantic corridor as a natural axis for rail motorways. It is an unequivocal sign of where ports are looking: beyond their immediate area.

Operations, however, remain fragile. Weather-related incidents, technical failures and infrastructure limitations affect

reliability. "There is a very high probability of risks and managing that reliability is critical," warns Jesús Calvo, Managing Director of Tramesa. Without stability, hauliers do not come back. And without repeat use, no rail motorway can consolidate.

Even so, the port discourse is openly optimistic. For Miguel Sanjuán, head of VIIA+, the challenge is to attract road haulage, not displace it. "We have to persuade the truck to get on the train," he says. Rail motorways combine the flexibility of road transport with the

capacity of rail, an argument ports use to reinforce their role as fully fledged intermodal nodes.

This vision is strengthened by maritime-rail integration. Mar Chao highlights the synchronisation between rail and maritime motorways, such

as those operated with Grimaldi, explaining that "ports are major generators and concentrators of cargo, and therefore major levers of multimodality". In a context of vertical integration by shipping lines, many feeder services, she points out, will eventually evolve into trains. The main brake remains technical. There is a lack of electrified kilometres, adequate loading gauges and terminals prepared to handle semi-trailers. "The loading gauge is key for trucks to be able to board the train," Arocas recalls. Hence the importance of the projects under way in Algeciras, Zaragoza or Badajoz, conceived as strategic nodes in a network that begins at the ports and extends inland. Forecasts are cautious, but steady. The future Algeciras-Zaragoza rail motorway will raise rail's share from 4 to close to 5 per cent.

## MAR CHAO

Chairwoman of the Port of Valencia

## "PORTS ARE MAJOR CARGO CONCENTRATORS AND LEVERS OF MULTIMODALITY"

Digitalisation will be the final glue. Without traceability, visibility and the ability to react to incidents, the shipper will not trust the system. "The major pending task is to integrate technology and intelligence to ensure rapid responses," stresses José Ignacio García, Director of the Logistics Chain at Renault Group Iberia.

The map now taking shape places ports at the centre. Valencia, Algeciras, Tarragona and the future inland nodes act as the engines of a slow but irreversible transformation. Rail motorways do not advance on their own: they move forward because there are docks pushing them. That constant pressure from the ports explains why road haulage has decided to board the train. Not by imposition, but by pure logistics common sense.

€  
4.3

BILLION

IS BEING ALLOCATED IN SPAIN TO IMPROVE THE RAIL NETWORK

INTERMODAL | SHIPPING COMPANIES

# THE RAILWAY BEING SHAPED BY SHIPPING COMPANIES

MAJOR MARITIME AND LOGISTICS GROUPS HAVE MOVED INTO RAIL TRACTION, BUT INTERMODALITY IS ADVANCING AMID WORKS, OPERATIONAL TENSIONS AND THE QUESTION OF HOW TO GROW WITHOUT SUBSIDIES



Intermodality aspires to move around one million TEU in Spanish ports.

Freight rail in Spain is no longer waiting to be driven forward by public policy. It is shipping lines and freight forwarders themselves that have decided to take the helm, integrating rail into their strategy so as not to depend on third parties and to offer complete logistics chains that are more sustainable and, above all, more controllable. Intermodality is gaining momentum, but it is also revealing its limits.

MSC, CMA CGM and Cosco, together with Spanish groups such as Alonso, Martico and Boluda, have stopped seeing rail as a mere link in the chain and have turned it into a strategic asset. Taking stakes in rail operators, controlling traction and developing their own corridors is today a way of protecting cargo in an environment that is increasingly demanding in terms of costs, emissions and reliability.

The picture is clear: CMA CGM has a stake in Continental Rail; Cosco is involved in CSP Logitren; Martico operates with Go Transport; and Grupo Alonso has taken a decisive step with the acquisition of Cefsa. In parallel, MSC is exploring an industrial alliance with Renfe Mercancías through Medway. The logic is the same: who-

ever concentrates the cargo also wants to decide how and when it moves.

In practice, shipping lines are transferring inland across the Iberian Peninsula a model already familiar in the maritime sphere. Trains operate as landside feeders, with adjusted compositions, regular corridors and a network vision designed to connect ports with inland nodes and, increasingly, to capture purely industrial traffic. The objective is to balance flows and avoid empty trains, an essential condition for profitability.

This progress is taking place, however, in a context of strong operational friction. Simultaneous works across the rail network have put the resilience of the system to the test. From the perspective of the major maritime shippers, the impact is manageable if the end result corrects historic bottlenecks. "Works are always inconvenient, but necessary; the problem would be if, once completed, they did not solve the problems or even generated new ones," Medlog warns.

The picture changes when one comes down to day-to-day operations. For rail operators, the intensity

and lack of coordination of the works are causing a real loss of capacity, higher costs and, in some cases, the forced return of traffic to the road. This is a scenario that clashes with the

model, rail and truck are not seen as enemies, but as complementary pieces of the same chain.

In the medium term, the intermodal sector aspires to move around one million



Shipping lines and freight forwarders have opted to take stakes in rail companies to secure traction resources in order to launch new regular services from Spanish ports.

sustainability objectives that underpin the commitment to rail.

The debate also extends to the field of incentives. While one part of the sector distrusts aid on the grounds that it distorts the market and puts pressure on prices, others are calling for the extension of 'eco-incentives' to road haulage.

Rail motorways are emerging as one of the possible turning points. Their success will depend on their ability to attract hauliers and not only shippers, and on offering capacity, interoperability and competitive costs. In this

TEU, supported by a network of inland terminals and dry ports that ease pressure on maritime enclaves. Cosco, MSC, Hutchison and Alonso are already working in that direction, seeking new nodes. Rail is advancing, but it is doing so while placing the system under strain. Shipping lines have decided to push hard, aware that control of the train is now a competitive advantage. The question is whether rail infrastructure and governance will be able to accompany that momentum without derailing in the attempt.

## SHIPPING LINES ARE TRANSFERRING THEIR MARITIME MODEL TO RAIL

MARITIME-PORT INDUSTRY IN SPAIN | GENERAL OVERVIEW

# STEADY COURSE, SWELLING SEAS

THE SECTOR FEELS THE EFFECTS OF HIGHER TRAFFIC AT SPANISH PORTS IN 2024 AND POINTS TO 4% SALES GROWTH

The maritime-port sector navigated the choppy waters of 2024 with a firm hand on the helm and its eyes fixed on the horizon. Traffic showed signs of recovery, posting an increase of 2.7 per cent, with an ecosystem—shipping lines, shipping agents, terminal operators, mooring service providers and tug operators—confirming that the port is not a backdrop, but an economic infrastructure in full activity.

Companies in this industry, the third-largest branch of

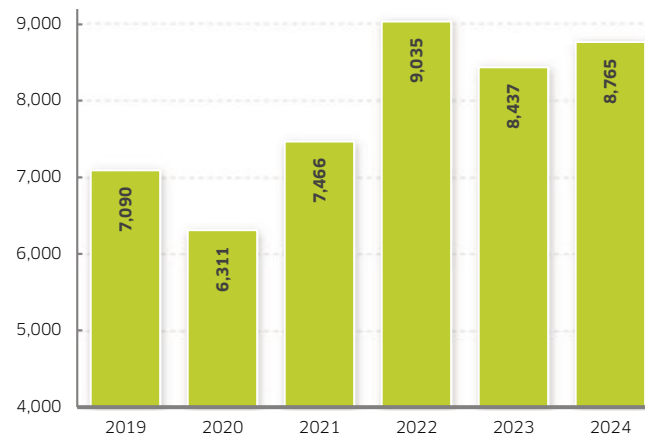
transport and logistics in Spain by revenue volume, point to a 4 per cent increase in turnover in 2024. Growth compared with 2019, prior to the pandemic, rises to 24 per cent.

This is the projection made by Transporte XXI on the basis of the financial statements filed with the commercial registries, which, at the close of this edition, represented 94 per cent of the companies with activity in the total sample and 92 per cent of 2023 revenues.

The estimated close of 2024

## BACK ON THE GROWTH PATH

The sector catches the right wave again after the drop in sales in 2023, a year marked by the return of ocean freight rates to normality and lower traffic.



Million euros. Source: Trade Register.

“confirms the recovery of activity at our terminals after the complex adjustment of the previous financial year”, recalls José Luis Romero, Secretary General of Anesco.

Moreover, this progress can-

not be explained by a single driving force, but rather by the sum of different rhythms within the same port area. Terminals are pushing strongly; shipping agents are gaining weight in a more complex environment; shipping lines are stabilising revenues; and tug operators and mooring service providers, discreetly, sustain the daily machinery at the docks with almost surgical stability.

Even so, 2024 was not a year of sailing without an underlying swell. Geopolitics continued to shape routes and decisions, and global logistics retained a degree of fragility.

At the top of the ranking stands Spanish shipping company Baleària, with revenues of €659 million in 2024, 6 per cent more than a year earlier.

## LARGE COMPANIES, THE ENGINE OF GROWTH

Operators with sales above €50 million, which point to turnover growth of 6%, are driving the sector's business. Only companies failing to reach €2 million show operating revenues below the levels of a year earlier.

	2024			2023			DIFF. 2024-2023			2019			DIFF. 2024-2019		
	COMPANIES	SALES	SHARE	COMP.	SALES	SHARE	COMP.	SALES	%	COMP.	SALES	SHARE	COMP.	SALES	%
> 50 million	32	4,687	53%	31	4,416	52%	+1	+271	+6%	26	3,534	50%	+6	+1,153	+33%
<b>&lt; 50 mill.</b>	<b>535</b>	<b>4,078</b>	<b>47%</b>	<b>546</b>	<b>4,021</b>	<b>48%</b>	<b>-11</b>	<b>+57</b>	<b>+1%</b>	<b>583</b>	<b>3,556</b>	<b>50%</b>	<b>-48</b>	<b>+522</b>	<b>+15%</b>
49,9 - 10 mill.	129	2,850	33%	128	2,786	33%	+1	+64	+2%	109	2,238	32%	+20	+612	+27%
9,9 - 2 mill.	225	1,071	12%	217	1,051	12%	+8	+20	+2%	233	1,121	16%	-8	-49	-4%
< 2 million	181	156	2%	201	185	2%	-20	-28	-15%	241	197	3%	-60	-41	-21%
No activity	73	-	-	63	-	-	+10	-	-	31	-	-	+42	-	-
<b>ACTIVE COMP.</b>	<b>567</b>	<b>8,765</b>	<b>100%</b>	<b>577</b>	<b>8,437</b>	<b>100%</b>	<b>-10</b>	<b>+328</b>	<b>+4%</b>	<b>609</b>	<b>7,090</b>	<b>100%</b>	<b>-42</b>	<b>+1,675</b>	<b>+24%</b>

Data in millions of euros. Source: Trade Register. 2024 sales are a projection based on data available at the time of going to press: 94% of companies equivalent to 92% of 2023 sales.



Asociación de Empresas Estibadoras y Centros Portuarios de Empleo

[www.anesco.org](http://www.anesco.org)  
Salustiano Olózaga, 6 - 1ªA - 28001 Madrid (Spain)

Working to improve our  
**Port Industry**

TOP COMPANIES IN THE MARITIME-PORT SECTOR IN SPAIN 2024

RK	COMPANY	SECTOR	YEAR OF BUILD	SALES							Results	Net Worth	Workforce
				2024	%24/23	%24/19	2023	2022	2021	2019			
1	Balearia Eurolíneas Marítimas SA	Shipping Line	1998	658.91	+6%	+52%	624.00	539.24	384.69	434.83	13.85	257.37	1,179
2	Fred Olsen SA	Shipping Line	1975	269.43	+3%	+38%	262.33	242.80	174.92	195.82	18.72	222.65	1,299
3	APM Terminals Algeciras SA	Terminal operator	1984	268.18	+8%	+15%	248.79	248.81	230.24	232.61	2.27	58.86	278
4	Boluda Lines SA	Shipping Line	1940	n.a.	-	-	257.79	279.24	204.59	162.39	11.83	83.06	140
5	Compañía Trasmediterránea SA	Shipping Line	1916	254.84	+11%	-35%	230.41	219.45	237.23	389.70	-6.88	164.56	308
6	CSP Iberian Valencia Terminal SA	Terminal operator	1988	247.39	+23%	+32%	200.69	229.34	210.78	187.29	30.45	195.12	256
7	Naviera Armas SA	Shipping Line	1966	226.42	-11%	+9%	254.03	234.29	183.40	207.57	115.65	278.78	641
8	Terminal Catalunya SA	Terminal operator	1990	n.a.	-	-	184.20	201.91	176.72	152.57	30.86	127.66	212
9	Flota Suardiaz SL	Shipping Line	1993	173.71	+30%	+110%	133.27	82.31	73.70	82.66	14.36	57.22	115
10	Ership SA	Shipping Line	1927	n.a.	-	-	168.19	163.09	127.45	130.75	12.88	250.58	393
11	Yang Ming (Spain) SL	Towage	2016	157.62	+65%	+134%	95.81	315.92	246.89	67.36	4.79	13.88	59
12	Empresa Naviera Elcano SA	Shipping Line	1943	146.77	-4%	-9%	153.67	178.92	155.22	162.08	1.03	157.57	54
13	APM Terminals Barcelona SL	Terminal operator	1999	139.48	+31%	+85%	106.14	115.33	85.44	75.28	23.51	164.37	211
14	Trasmed GLE SL	Towage	2021	137.13	+3%	-	133.39	137.31	64.39	0	-18.63	221.37	368
15	Bergé Marítima SL	Towage	2007	120.22	+0%	-3%	120.12	110.16	95.93	124.28	-0.38	35.82	339
16	M.S.C. Terminal Valencia SA	Terminal operator	2005	n.a.	-	-	119.58	119.20	123.00	108.15	13.70	66.16	97
17	DFDS Iberia SL	Shipping Line	1999	n.a.	-	-	114.73	100.39	34.76	99.75	8.00	38.07	221
18	APM Terminals Valencia SA	Terminal operator	1998	108.76	+8%	+30%	100.75	100.06	96.68	83.42	6.04	54.25	188
19	Noatum Maritime Spain SA	Towage	1963	n.a.	-	-	100.35	136.44	112.69	130.00	5.50	23.56	252
20	E Erhardt y Compañía SA	Towage	1921	88.06	-5%	+43%	92.39	126.14	89.44	61.58	7.65	43.72	1
21	Total Terminal International Algeciras SA	Terminal operator	2008	n.a.	-	-	79.40	77.40	75.14	74.11	0.28	78.84	113
22	Tepsa Iberia SL	Terminal operator	2000	73.89	+5%	+42%	70.08	65.18	58.62	51.91	17.30	27.61	171
23	Marguisa Shipping Lines SL	Shipping Line	2014	n.a.	-	-	67.56	71.06	60.64	50.72	0.36	8.46	19
24	Pérez Torres Marítima SL	Terminal operator	1990	64.15	-7%	-12%	69.23	97.09	73.19	72.78	3.24	26.94	298
25	International Forwarding SL	Towage	1985	62.93	+21%	+95%	52.10	85.60	74.65	32.25	1.50	6.07	233

Data in millions of euros. Source: Trade Register.



**WE MOVE THE FUTURE**

HQ: Ronda del Port, 437 Barcelona, 08039 Spain



Barcelona (Port) | Tarragona | Constantí | Esparreguera  
El Palmar | Algeciras | Riba Roja

**Depot Container Services** | Depot Container Services provides safe, accumulates more than 30 years of Experience efficient container repair, storage and handling to optimize logistics and available space.

**MORE THAN A PROVIDER: YOUR STRATEGIC DEPOT PARTNER.**  
Efficiency + innovation + sustainability to keep cargo flowing.



depotcontainerservices.com

customerservice@bcndepot.com +34 93 289 62 30



**COMA Y RIBAS**  
CHARLES ANDRÉ



**TOGETHER, EXCEEDING YOUR EXPECTATIONS**



Poligono Industrial Santiga  
C/Obradors, N°7  
08130 Santa Perpetua de Mogoda (Barcelona)  
Spain  
Tel. : (+34) 932 234 153  
Email: comayribas@gcatrans.com




MARITIME-PORT INDUSTRY IN SPAIN | SHIPBROKING COMPANIES

# MORE CALLS, MORE MANAGEMENT

SHIP AGENCIES POINT TO A 4% INCREASE IN AGGREGATE SALES IN 2024, REFLECTING HIGHER ACTIVITY AT PORTS AND INFRASTRUCTURE THAT IS BECOMING INCREASINGLY COMPLEX AND DEMANDING

Port activity once again showed that a good part of the business is played out on land; in offices, telephone in hand, looking not at the horizon but at the calendar, deadlines and operations that are becoming ever more complex and demanding. The figures for 2024, a year in which merchant vessel calls at Spanish ports grew by 1 per cent, support that sense of constant work; a management role that serves as the interface between shipping lines, terminals, port authorities and a long list of players involved in the supply chain.

Ship agents point to a 4 per cent increase in revenues in 2024, approaching €2.6 billion, well above the 1.946 billion recorded in 2019, before the pandemic, but still below the 2022 record, driven by the sharp surge in ocean freight rates.

In just five years, the business of ship agency companies, with a market share of 29 per cent within the maritime-port sector, has grown in scale. The picture is clear: the modern port is built as much on the quay as in the back office of day-to-day management.

The ranking is led by Yang Ming (Spain), which has sharply increased its turnover since 2019 hand in hand with its parent shipping line, Taiwan's Yang Ming Marine. In 2024, the ship agency increased its sales by 65 per cent to reach €157 million.

Next comes Tramed, part of Grupo Grimaldi. The company closed 2024 with sales of €137 million, representing an increase of 3 per cent.

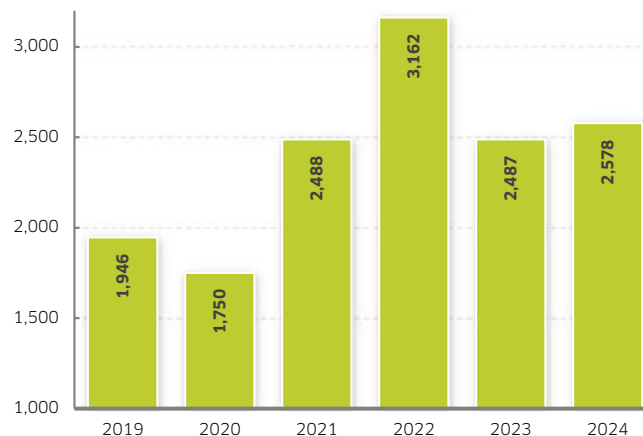
Completing the podium is Bergé Marítima, now owned by A.P. Moller-Maersk. The maritime operator virtually replicated the previous year, with revenues of €120 million. That figure still stands below pre-pandemic levels (-3 per cent).



Sales for shipping agents improved by 4% during 2024.

## WITH THE WIND IN ITS SAILS

Ship agency companies are returning to an upward curve, but they have not yet completed the recovery, with sales still below the peak reached in 2022.



Million euros. Source: Trade Register.

Within the top 10 ranking by sales volume, the growth recorded by Transglory (+37 per cent), Green Ibérica (+24 per cent) and the neutral logistics operator International Forwarding (+21 per cent) also stands out.

At the opposite end, the sharp fall of Kaleido Logistics (-42 per cent) is noteworthy, a company that a year earlier had climbed to third place in the ranking after closing 2023 with sales of 107 million and growth of 4 per cent.

**32%**

SALES UP  
COMPARED WITH  
PRE-PANDEMIC  
LEVELS

SHIP AGENCIES IN SPAIN IN 2024

RK	COMPANY	PROVINCE	YEAR OF BUILD	SALES				Results	Networth	Workforce			
				2024	%24/23	%24/19	2023				2022	2021	2019
1	Yang Ming (Spain) SL	Barcelona	2016	157.62	+65%	+134%	95.81	315.92	246.89	67.36	4.79	13.88	59
2	Trasmed GLE SL	Valencia	2021	137.13	+3%	-	133.39	137.31	64.39	0	-18.63	221.37	368
3	Bergé Marítima SL	Bizkaia	2007	120.22	+0%	-3%	120.12	110.16	95.93	124.28	-0.38	35.82	339
4	Noatum Maritime Spain SA	Barcelona	1963	n.a.	-	-	100.35	136.44	112.69	130.00	5.50	23.56	252
5	E Erhardt y Compañía SA	Bizkaia	1921	88.06	-5%	+43%	92.39	126.14	89.44	61.58	7.65	43.72	1
6	International Forwarding SL	Valencia	1985	62.93	+21%	+95%	52.10	85.60	74.65	32.25	1.50	6.07	233
7	Kaleido Logistics SL	Pontevedra	2008	61.81	-42%	-11%	106.91	102.61	76.30	69.71	2.26	18.91	46
8	A Pérez y Cía SL	Cantabria	1966	60.74	-4%	+42%	63.12	65.68	56.22	42.69	5.66	136.92	266
9	Transglory SA	Barcelona	1995	59.09	+37%	+130%	43.19	83.34	62.22	25.71	1.30	11.19	124
10	Green Ibérica SL	Valencia	1984	56.65	+24%	+78%	45.64	93.33	81.68	31.82	7.72	33.75	40
11	Mediterranean Shipping Company España SL	Valencia	2010	54.41	+1%	-21%	54.03	52.28	44.96	68.76	1.33	34.48	644
12	Maersk Spain SL	Madrid	2007	54.27	+8%	+70%	50.02	41.97	35.25	32.01	0.72	10.69	485
13	Consignaciones Toro y Betolaza SA	Bizkaia	1966	50.49	+20%	+44%	41.91	40.71	34.34	35.11	2.25	19.65	82
14	WEC Lines España SL	Barcelona	2007	46.37	-8%	+20%	50.48	65.46	46.95	38.52	-0.18	5.09	106
15	Arkas Spain SA	Valencia	2005	43.52	+18%	+12%	36.99	49.71	47.51	39.01	5.73	35.07	72
16	Cosco Shipping Lines Spain SA	Barcelona	1997	42.59	+5%	+102%	40.47	44.33	31.88	21.13	0.94	3.57	126
17	Hamilton y Compañía SA	Las Palmas	1977	n.a.	-	-	42.09	50.29	38.80	45.67	2.37	11.94	41
18	Romeu y Compañía SA	Valencia	1975	n.a.	-	-	38.54	63.43	42.84	30.51	0.72	6.25	90
19	J Ronco y Cía SL	Almería	1970	36.24	+6%	+21%	34.26	41.96	27.76	29.95	1.29	11.34	124
20	MH Bland SL	Cádiz	2000	36.21	+18%	+244%	30.63	23.51	14.04	10.53	0.87	3.41	44
21	Soluciones Integrales Marítimas SL	Valencia	2009	36.16	-11%	+23%	40.41	33.29	31.38	29.33	0.28	0.71	14
22	European Supply Chain Services SL	Barcelona	1981	34.73	-5%	+7%	36.75	47.96	38.49	32.35	0.83	10.08	84
23	Globelink Uniexco SL	Madrid	1966	32.79	+20%	+35%	27.38	66.85	55.75	24.37	2.19	4.49	56
24	Ttes. y Consignaciones Marítimas Baleares SA	Baleares	1996	n.a.	-	-	31.22	26.92	13.87	13.29	1.31	4.70	58
25	CMA CGM Ibérica SA	Barcelona	2003	30.82	-2%	+121%	31.39	31.79	27.51	13.92	1.26	2.92	381
26	Alvargonzález SA	Asturias	1981	29.48	-32%	+9%	43.33	40.35	28.83	27.12	1.41	118.29	22
27	CMA CGM Inland Services Spain SA	Bizkaia	1993	n.a.	-	-	n.a.	28.79	22.84	17.09	0.97	7.65	158
28	Agunsa Europa SA	Madrid	2005	28.16	-7%	+45%	30.38	49.51	21.29	19.37	1.63	3.58	46
29	Sobrinos de Manuel Cámara SA	Gipuzkoa	1981	27.70	+2%	+53%	27.12	22.59	22.25	18.14	-1.94	5.17	46
30	Transportes y Consignaciones Marítimas SA	Barcelona	1962	25.89	+4%	-9%	24.94	33.30	30.20	28.52	0.32	1.82	37
31	Marítima Alisea SL	Valencia	2008	24.22	-3%	+36%	25.07	20.98	18.34	17.81	0.34	0.75	24
32	Incargos SL	Madrid	2000	23.63	-10%	+11%	26.12	27.63	15.75	21.20	0.10	4.75	38
33	Alfaship Shipping Agency SL	Las Palmas	2011	n.a.	-	-	22.88	23.55	19.32	12.72	0.26	2.27	-
34	Wilhelmsen Ships Service Spain SA	Cádiz	1987	n.a.	-	-	22.51	19.15	12.15	14.66	5.43	9.87	-
35	Consignaciones Europeas Marítimas SA	Bizkaia	1998	22.04	-16%	+12%	26.21	44.26	29.05	19.67	1.01	2.50	13
36	Ceferino Nogueira SA	Pontevedra	1983	21.65	+0%	+42%	21.57	22.13	20.14	15.21	0.58	15.29	39
37	Port Ferry Services SL	Cádiz	2010	21.56	+107%	+221%	10.43	10.81	4.74	6.72	0.83	1.42	32
38	Alfaship Maritime Services SL	Barcelona	2018	20.59	-1%	+48%	20.90	17.07	13.02	13.91	0.64	2.00	18
39	Baleares Consignatarios SL	Baleares	1992	17.94	-5%	+16%	18.79	14.45	9.42	15.44	0.52	2.92	17
40	Consignatarios de Barcos de Santander SA	Cantabria	1984	17.83	-15%	+32%	20.91	19.36	13.11	13.50	-0.83	0.51	31

Data in millions of euros. Source: Trade Register.

**LAUMAR**

www.laumar-cargo.es  
 comercial@laumar-cargo.es  
 +34 96 330 67 68  
 Avenida del Puerto 189  
 Valencia 46022 (Spain)

MARITIME-PORT INDUSTRY IN SPAIN | TERMINAL OPERATORS

# PORT OPERATIONS AT THE QUAYSIDE SET THE PACE

RISING TRAFFIC CONSOLIDATES TERMINALS AS THE DRIVING FORCE OF THE SECTOR'S BUSINESS

The increase in port activity became especially visible at terminals, the point where infrastructure is turned into tangible business. Terminal operators maintained their steady pace and, in many cases, accelerated it. Once again, the quay became the centre of gravity of the port system.

The figures confirm this reality without the need for excessive interpretation. Companies included in this segment point to an 8 per cent increase in aggregate sales, four percentage points above the average for the maritime-port sector. Expected revenues are close to €2.7 billion, a new all-time high. In addition, growth compared with pre-pandemic levels reaches 24 per cent. In other words, terminals have not only recovered lost ground, but have also ex-

€  
500

**MILLION MORE  
IN TURNOVER  
COMPARED WITH  
THE 2019 FIGURES**

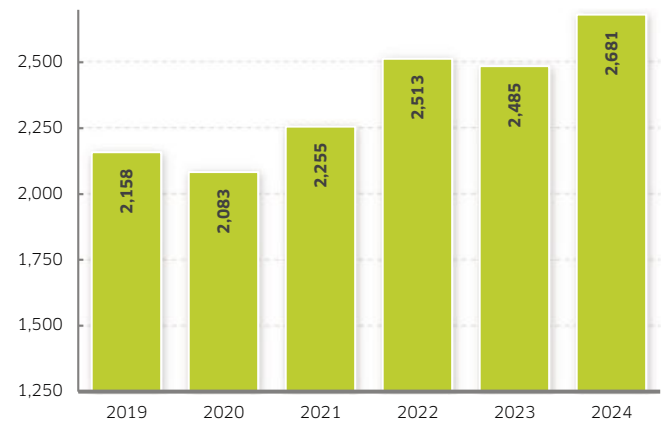
panded their economic weight within the port ecosystem.

The estimated close of 2024 “confirms the recovery of activity at our terminals after the complex adjustment of the previous financial year”, recalls José Luis Romero, Secretary General of Anesco. This growth, he adds, “is not merely statistical; it reflects the resilience of our stevedoring companies, which have managed a volume of cargo far higher than in 2019, adapting to global disruptions”. Even so, Romero remains cautious: “Despite this good figure, all that glitters is not gold.

The sector is facing a constant increase in labour and energy costs that companies are not able to pass on fully through their tariffs, putting pressure on their margins”.

## NEW RECORD

Terminal operators are growing once again and are expected to close the 2024 financial year at a new all-time high, reaching close to €2.7 billion (+8%).



Million euros. Source: Trade Register.

At the top of the ranking stands APM Terminals Algeciras, with revenues of 268 million in 2024 and growth of 8 per cent.

## Your Gateway to Global Markets

World class logistics and multimodal platforms for import, export and transshipment maritime traffic between Europe, Asia, Africa and America



**TCTenerife**

- 15.0 hectares
- 620,000 TEU
- 16m draft
- 700m berthing line for ro-ro, project cargo and containers
- More than 700reefer plugs
- Ro-ro and containerized services with Spain Mainland and Northern Europe
- Transshipment Hub

**TMS**

- 36.5 hectares
- 400,000 TEU
- 14m draft
- 1,290m berthing line for ro-ro, Project cargo, containers and solid bulks and passengers
- Ro-Ro services from/to Morocco and Algeria
- Railway services from/to United Kingdom, France and Spain
- Intermodal link Ro-ro/Railway



A smart, safe and sustainable mobility company

Aleatica is the leading transport infrastructure operator present in 7 countries of Europe and Latin America.

Founded in 2018, Aleatica emerged with the mission of offering safe and sustainable mobility solutions, backed by cutting-edge technology, that anticipate user needs.

TOP TERMINAL OPERATOR COMPANIES IN SPAIN IN 2024

RK	COMPANY	PROVINCE	YEAR OF BUILD	SALES							Results	Networth	Workforce
				2024	%24/23	%24/19	2023	2022	2021	2019			
1	APM Terminals Algeciras SA	Cádiz	1984	268.18	+8%	+15%	248.79	248.81	230.24	232.61	2.27	58.86	278
2	CSP Iberian Valencia Terminal SA	Valencia	1988	247.39	+23%	+32%	200.69	229.34	210.78	187.29	30.45	195.12	256
3	Terminal Catalunya SA	Barcelona	1990	n.a.	-	-	184.20	201.91	176.72	152.57	30.86	127.66	212
4	APM Terminals Barcelona SL	Barcelona	1999	139.48	+31%	+85%	106.14	115.33	85.44	75.28	23.51	164.37	211
5	M.S.C. Terminal Valencia SA	Valencia	2005	n.a.	-	-	119.58	119.20	123.00	108.15	13.70	66.16	97
6	APM Terminals Valencia SA	Valencia	1998	108.76	+8%	+30%	100.75	100.06	96.68	83.42	6.04	54.25	188
7	Total Terminal Internacional Algeciras SA	Cádiz	2008	n.a.	-	-	79.40	77.40	75.14	74.11	0.28	78.84	113
8	Tepsa Iberia SL	Barcelona	2000	73.89	+5%	+42%	70.08	65.18	58.62	51.91	17.30	27.61	171
9	Pérez Torres Marítima SL	Pontevedra	1990	64.15	-7%	-12%	69.23	97.09	73.19	72.78	3.24	26.94	298
10	Operaciones Portuarias Canarias SA	Las Palmas	1977	n.a.	-	-	49.95	44.42	44.28	32.35	0.24	32.07	114
11	CSP Iberian Bilbao Terminal SL	Bizkaia	2000	46.88	-2%	-19%	48.08	47.23	47.83	57.99	2.76	43.49	60
12	Galigrain SA	Pontevedra	1993	41.50	-21%	+31%	52.29	34.40	28.39	31.62	3.64	88.30	123
13	Valencia Terminal Europa SA	Valencia	1998	41.42	-9%	-	45.71	42.80	35.36	n.a.	0.26	14.17	89
14	Autoterminal SA	Barcelona	1990	n.a.	-	-	39.24	23.53	17.35	27.51	4.81	18.76	66
15	Terminales Químicos SA	Tarragona	1970	38.11	+10%	+32%	34.53	31.07	34.07	28.94	5.86	38.44	122
16	Terminales Marítimas de Vigo SL	Pontevedra	1993	37.77	+65%	+143%	22.89	20.92	19.31	15.52	2.61	9.25	39
17	Euroports Ibérica TPS SL	Tarragona	1993	34.21	-6%	+23%	36.28	40.31	31.84	27.73	0.38	12.33	42
18	E.B.H.I. SA	Asturias	1991	n.a.	-	-	29.95	29.96	23.26	26.71	0.60	8.94	99
19	Noatum Terminal Málaga SA	Málaga	2017	29.35	+104%	+32%	14.40	20.97	25.69	22.28	1.33	25.97	21
20	Bergé Marítima Bilbao SL	Bizkaia	1972	29.32	+6%	-10%	27.77	28.08	24.31	32.71	3.26	10.42	27
21	Grimaldi Terminal Barcelona SL	Barcelona	2011	28.98	+105%	+108%	14.14	13.09	12.85	13.95	0.45	21.54	31
22	Evos Algeciras SA	Cádiz	2005	28.81	+8%	+36%	26.76	26.81	23.53	21.13	6.40	46.68	58
23	Noatum Terminal Sagunto SL	Valencia	2017	n.a.	-	-	27.02	23.19	17.72	17.41	3.18	10.19	19
24	Portsur Castellón SA	Castellón	2005	26.81	+19%	+57%	22.62	27.15	26.86	17.06	2.13	34.53	42
25	Estibadora Algeposa SA	Gipuzkoa	1995	25.60	-0%	+30%	25.72	26.72	26.37	19.77	-0.06	7.85	28

Data in millions of euros. Source: Trade Register.






## Cleaning Container Stop Barcelona



Tel: +34 93 144 00 60 • [www.cleanbcn.com](http://www.cleanbcn.com) • [customer@cleanbcn.com](mailto:customer@cleanbcn.com)













**The First ONE STOP SHOP for Tanks in Barcelona Port**  
We Clean, Heat and Repair Tanks



# ATLANSEA

SHIPPING AGENT AND BUNKERS SUPPLIERS



+34 928 226 013 (24 hour service)

C/ Eduardo Benot, 51, 4th Flr. A, 35008 Las Palmas de Gran Canaria, Canary Islands, Spain

[www.atlansea.com](http://www.atlansea.com)

[shipping@atlansea.com](mailto:shipping@atlansea.com) (24 hour service)

Fax: +34 928 224 633

MARITIME-PORT INDUSTRY IN SPAIN | SHIPPING COMPANIES

# CAUTION IN THE CARGO HOLD

AFTER THE HEAVY BLOW OF THE PANDEMIC, SHIPPING LINES STABILISED REVENUES IN 2024 AND MANAGED TO STRING TOGETHER FOUR CONSECUTIVE YEARS OF GROWTH

Shipping lines are moving ahead on a restrained course, without great fanfare, but with the solidity of those who have learned to sail in changing waters. This is not a segment that is accelerating, but neither is it slowing down, having managed to string together four consecutive years of growth. Companies are simply continuing to steer the helm with professional skill.

This segment, the most representative of the maritime-port sector, with a 34 per cent share, points to a 2 per cent increase in aggregate sales, to nearly €3 billion. Growth compared

2%

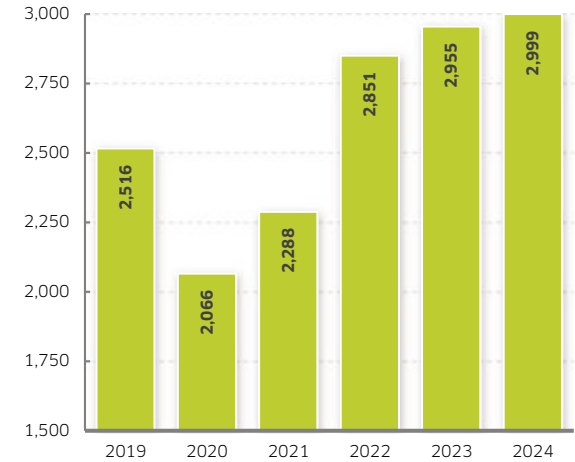
SALES GROWTH  
OF THE  
SHIPPING LINES  
IN 2024

with 2019, prior to the pandemic, rises to 19 per cent. Shipowners also remain one of the system's main driving forces. In fact, there are seven shipping companies in the sector's top 10. Even so, one clarification is needed. Given that in Spain there are numerous shipping lines that carry not only passengers but also freight, Transporte XXI has decided to include them in the report, although part of their sales relates to passenger traffic.

This is the case of Baleària, which heads the ranking. The shipping line, chaired by Adolfo Utor, closed 2024 with revenues

## WITH ITS EYES ON THE HORIZON

Shipping lines are learning to steer the helm with precision. Companies, which continue to sail with the wind in their favour, have increased their sales by 19% compared with pre-pandemic levels, after setting a new record in 2024.



Million euros. Source: Trade Register.

of €659 million and growth of 8 per cent. The company carried 5.6 million passengers in 2024 and exceeded 7.6 million lane metres of freight, equivalent to 564,000 trucks.

Next comes Fred. Olsen, with revenues of €269 million, representing an increase of 3 per cent. The shipping line closed 2024 with more than 3.7 million passengers and 950,000 tonnes of cargo.

Completing the podium is Boluda Lines, for which no 2024 data had been filed at the close of this edition.

Despite the sector's good figures, uncertainty remains very present. Geopolitical tensions continue to shape decisions and routes, and the regulatory environment adds further layers of complexity to a global and competitive business.



**BERGÉ**  
Moved by Logistics

#yourreferenceoperator

**We are  
logistics**

bergelogistics.com

TOP SHIPPING COMPANIES IN SPAIN IN 2024

RK	COMPANY	PROVINCE	YEAR OF BUILD	SALES							Results	Networth	Workforce
				2024	%24/23	%24/19	2023	2022	2021	2019			
1	Balearia Eurolíneas Marítimas SA	Alicante	1998	658.91	+6%	+52%	624.00	539.24	384.69	434.83	13.85	257.37	1,179
2	Fred Olsen SA	S.C. Tenerife	1975	269.43	+3%	+38%	262.33	242.80	174.92	195.82	18.72	222.65	1,299
3	Boluda Lines SA	Las Palmas	1940	n.a.	-	-	257.79	279.24	204.59	162.39	11.83	83.06	140
4	Compañía Trasmediterránea SA	Las Palmas	1916	254.84	+11%	-35%	230.41	219.45	237.23	389.70	-6.88	164.56	308
5	Naviera Armas SA	Las Palmas	1966	226.42	-11%	+9%	254.03	234.29	183.40	207.57	115.65	278.78	641
6	Flota Suardíaz SL	Madrid	1993	173.71	+30%	+110%	133.27	82.31	73.70	82.66	14.36	57.22	115
7	Ership SA	Madrid	1927	n.a.	-	-	168.19	163.09	127.45	130.75	12.88	250.58	393
8	Empresa Naviera Elcano SA	Madrid	1943	146.77	-4%	-9%	153.67	178.92	155.22	162.08	1.03	157.57	54
9	DFDS Iberia SL	Cádiz	1999	n.a.	-	-	114.73	100.39	34.76	99.75	8.00	38.07	221
10	Marguisa Shipping Lines SL	Madrid	2014	n.a.	-	-	67.56	71.06	60.64	50.72	0.36	8.46	19
11	Murueta Atlántico Alcudia Shipping AIE	Bizkaia	2012	49.01	+16%	+63%	42.22	62.51	47.05	30.01	-	-	-
12	Naviera Tamarán SA	Las Palmas	2011	37.84	+3%	+131%	36.70	23.88	14.50	16.36	0.05	0.42	5
13	Verenigde Tankrederij Spain SA	Cádiz	1988	34.33	+14%	+38%	29.99	31.46	26.08	24.84	6.72	33.58	131
14	Nisa Marítima SA	Valencia	1999	30.19	-11%	+40%	34.08	28.55	25.75	21.51	1.14	4.10	5
15	Servicios y Concesiones Marítimas Ibicencas SA	Balears	1979	28.17	+11%	+52%	25.41	21.91	14.40	18.58	1.10	45.25	210
16	Distribuidora Marítima Petrogas SL	S.C. Tenerife	1999	26.54	-6%	+3%	28.21	29.67	23.83	25.77	5.88	78.17	46
17	Naviera Living Stone SL	Alicante	2015	n.a.	-	-	n.a.	25.84	33.76	27.13	-8.99	109.63	7
18	Knutsen OAS España SL	Madrid	2005	25.02	+1%	+30%	24.78	24.87	27.77	19.24	0.18	4.41	270
19	Naviera Seapeak Maritime Gas IV SL	Madrid	2001	n.a.	-	-	23.38	25.02	22.24	17.34	9.20	48.65	1
20	Naviera Seapeak Maritime Gas II SL	Madrid	2000	22.87	+11%	+19%	20.64	22.04	20.81	19.22	13.10	65.93	2
21	Ocmis Maritime SL	Castellón	2016	21.34	+119%	+203%	9.76	12.89	19.37	7.05	0.05	-0.22	6
22	Naviera Seapeak Maritime Gas III SL	Madrid	2000	19.06	+8%	-16%	17.67	23.13	20.41	22.73	-66.57	2.62	1
23	Mureloil SA	Bizkaia	2003	18.57	+16%	+113%	15.97	10.48	9.89	8.71	2.75	27.34	114
24	Flotanor SL	Bizkaia	2009	n.a.	-	-	n.a.	15.45	15.58	16.77	8.87	18.59	2
25	Naviera Seapeak Maritime Gas SL	Madrid	1989	13.86	-24%	-37%	18.20	29.33	20.72	21.94	-54.00	42.86	1

Data in millions of euros. Source: Trade Register.

**MSC**  
TERMINAL VALENCIA

*Dedicated to you!*

Muelle MSC s/n · Puerto de Valencia · 46024 Valencia (Spain)  
Tel.: +34 96 332 55 00 · Fax: +34 96 332 58 00 · [www.msctv.es](http://www.msctv.es)

**DEPOT REAL BENLOCH S.A.**

OPERADOR LOGÍSTICO INTEGRAL  
SUPPLY CHAIN INTEGRATION

30 YEARS

**Macca de Garantía**  
Puerto de Valencia

**FOURTH PARTY LOGISTICS (4PL)**  
LOGISTIC SERVICE PROVIDERS

Depot Real Benloch, S.A.  
Av. Alacant, 10 - 46460 - Silla, Valencia (Spain)  
T +34 963 670 888 | [realbenloch.com](http://realbenloch.com)



Boluda towing an MSC vessel.

MARITIME-PORT INDUSTRY IN SPAIN | MOORING AND TUGBOATS

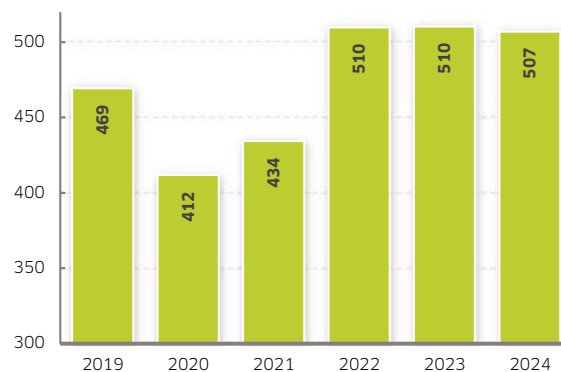
# ESSENTIAL SERVICES

COMPANIES IN THIS SEGMENT, WHICH SUSTAIN THE DAY-TO-DAY OPERATION OF THE PORT DESPITE THEIR SMALL MARKET SHARE, POINT TO A DECLINE IN SALES IN 2024

The tug and mooring sector does not generate large turnover volumes nor does it headline striking expansion stories, but it is present in every manoeuvre, every berthing operation and every departure. These services are the first and the last link in a vessel's port call, and their work sustains the day-to-day operation of the port. The figures reflect this reality. In 2024, tug and mooring services point to a slight decline of 1 per cent, with aggregate sales of 507 million, practically in line with the €510 million recorded in 2023 and slightly above the €469 million of 2019. Growth is restrained, almost flat in the short term. Their weight within the maritime-port sector as a whole is limited, barely 6 per cent, but their small share of turnover contrasts with their operational impact. Without tug services and without mooring, the port comes to a halt.

## STABLE ACTIVITY

The evolution of sales reflects a very clearly defined model: regulated tariffs, high operating costs, and demanding requirements in safety and availability.



Million euros. Source: Trade Register.

A more detailed analysis reveals the strong concentration of the business in the hands of Boluda Corporación Marítima, with six companies in the top 10, including the top two in the ranking: Servicios Auxiliares de Puertos, with no data available at the close of this edition, and Remol-

cadores Boluda, with revenues of €41.74 million (-1 per cent).

Completing the podium is Compañía de Remolcadores Ibaizabal, part of Grupo Ibaizabal, another of the sector's heavyweights, with no data available at the close of this edition.

TOP BERTHS AND TUGS IN SPAIN IN 2024

RK	COMPANY	PROVINCE	YEAR OF BUILD	SALES							Results	Networth	Workforce
				2024	%24/23	%24/19	2023	2022	2021	2019			
1	Servicios Auxiliares de Puertos SA	Ceuta	1947	n.a.	-	-	44.12	37.88	32.76	31.29	1.62	24.82	105
2	Remolcadores Boluda SAU	Valencia	1981	41.74	-1%	+21%	42.21	44.85	35.08	34.50	5.69	209.35	86
3	Compañía de Remolcadores Ibaizabal SA	Bizkaia	1906	n.a.	-	-	31.33	30.57	24.34	28.00	8.98	22.54	80
4	Remolcadores de Puerto y Altura SA	Tarragona	1978	n.a.	-	-	n.a.	22.02	23.62	22.00	0.90	12.85	46
5	Remolcadores Nosa Terra SA	Pontevedra	1974	21.83	+11%	-2%	19.70	17.46	16.35	22.24	11.98	69.09	146
6	Remolcadores de Cartagena SA	Valencia	1973	19.88	-9%	+28%	21.83	22.90	15.34	15.57	5.17	36.89	59
7	Remolcadores y Barcazas de Las Palmas SA	Las Palmas	2003	19.44	+8%	+46%	18.01	18.22	14.30	13.35	4.26	23.26	55
8	Remolques del Mediterráneo SA	Castellón	1976	18.43	+4%	-33%	17.76	21.74	21.34	27.68	2.85	41.89	50
9	Sertosa Norte SL	Coruña	1998	n.a.	-	-	17.37	16.04	14.74	14.83	0.69	4.90	76
10	Auxiliar Marítima del Sur SA	Huelva	1966	n.a.	-	-	16.98	18.29	15.13	15.52	2.63	27.11	41
11	Remolcadores de Barcelona SA	Barcelona	1924	n.a.	-	-	14.76	13.20	11.96	14.56	4.00	19.11	65
12	SAR Remolcadores SL	Barcelona	1998	9.88	-0%	+2%	9.91	8.83	8.04	9.70	1.78	16.62	41
13	Servicios Portuarios Canarias SL	Las Palmas	1998	9.51	+38%	+58%	6.89	6.00	4.94	6.01	2.96	5.23	104
14	Amarres de Barcelona SL	Barcelona	2018	9.29	+3%	-	9.00	8.88	0	0	0.52	1.53	119
15	Compañía Ibérica de Remolcadores del Estrecho SA	Cádiz	1969	9.19	-36%	-52%	14.30	20.91	18.68	19.29	0.37	16.90	45
16	Remolques Gijoneses SA	Asturias	1987	8.98	-0%	+35%	9.00	8.55	6.83	6.67	2.08	24.34	31
17	Remolques y Servicios Marítimos Reyser SL	Madrid	1955	n.a.	-	-	n.a.	8.28	0.82	n.a.	-	-	25
18	Remolques y Navegación SA	Tarragona	1964	n.a.	-	-	n.a.	7.80	7.98	8.15	1.14	0.35	29
19	Remolcadores Ría de Ferrol SL	Coruña	2014	7.56	-20%	>999%	9.41	8.29	0	0.36	0.36	2.88	1
20	Amarradores Puerto de Bilbao SA	Bizkaia	1990	7.30	-1%	+2%	7.38	6.94	6.07	7.13	0.57	12.16	80
21	Servicios Marítimos Algeciras SA	Cádiz	1989	6.43	-2%	+6%	6.56	6.28	6.09	6.04	0.23	5.94	27
22	Zumaia Offshore SL	Gipuzkoa	2006	6.41	+14%	+99%	5.64	4.72	3.38	3.21	1.97	9.28	33
23	Naviera de Remolcadores y Servicios SL	Tarragona	2000	6.36	+25%	+83%	5.08	4.10	3.88	3.48	1.50	5.45	61
24	Amarre y Desamarre Molina e Hijos SL	Huelva	2001	5.90	+32%	+169%	4.46	3.84	2.44	2.20	0.44	3.01	46
25	Boat Service SA	Cádiz	1974	n.a.	-	-	n.a.	5.78	4.84	5.31	-0.54	3.69	26

Data in millions of euros. Source: Trade Register.

“Cleaning that keeps the world moving”

**LE LAVADEROS EUROPA**  
Tank Cleaning

HQ: Polígono Industrial Riu Clar. Parc. 169-179, C/ Or, s/n. 43006 Tarragona



Tarragona | Esparreguera | Cartagena | Mérida | Seseña | Riba Roja | Algeciras

- Highest quality & safety standards
- Environmental commitment
- Backed by international certifications

Lavaderos Europa accumulates more than 35 years of Experience

**LE** lavaderoseuropa.com

+34 977 54 70 06 grupo@lavaderoseuropa.com

(+34) 962 699 060  
info@saguntoti.com  
Muelle Norte 2. s/n · 46520  
Puerto de Sagunto (Valencia)

**ist**  
Intersagunto Terminales

The most modern multi-purpose terminal in Spain's Mediterranean ports



ISO 9001 · 14001 · 45001

www.saguntoti.com

SPANISH FOREIGN TRADE | INTERNATIONAL MARITIME TRANSPORT

# SPAIN, A LOGISTICS HUB WITH ACCESS TO THE SEA

SPAIN'S MARITIME FOREIGN TRADE GREW BY 1.3% IN 2025, DRIVEN BY IMPORT GROWTH

Geopolitical and tariff tensions, which are shaking international trade, failed to halt the recovery of trade flows between Spain and the rest of the world by sea in 2025.

The provisional data handled by the Ministry of Industry, Trade and Tourism reflect this progress. In a context of strong global uncertainty, imports and exports by ship, with Spanish ports as the main protagonists, exceeded 280.5 million tonnes in 2025 (excluding transport through fixed platforms; hence the differences with the data provided by Puertos del Estado, shown on the following pages). This figure represents an increase of 1.3 per cent, thanks to the strong performance of imports (+3.8 per cent), which account for 67 per cent of Spain's total foreign trade by sea. Exports, by contrast, fell by 3.5 per cent. Despite the advance in import-export flows during the past year, the shortfall compared with pre-pandemic levels still stands at 6.6 per cent. Almost 20 million tonnes less than in

2019, the year in which volumes exceeded 300 million tonnes.

A detailed analysis of foreign trade statistics also makes it possible to identify Spain's main trading partners.

The United States remains at the top of the ranking, far ahead of its nearest follower. Trade flows exceeded 36.5 million tonnes in 2025, 14 per cent more than a year earlier, with Trump's aggressive tariff policy as a backdrop, setting off alarm bells. The main import categories include energy products, with almost 22 million tonnes, and cereals, with 3.7 million tonnes. On the Spanish export side, raw materials stand out, with close to 3.2 million tonnes, and semi-manufactures, with 2 million tonnes.

Brazil remains next in line, despite a 2 per cent fall in trade flows, to just under 20 million tonnes.

China completes the podium, with 11.6 million tonnes, representing an increase of 13 per cent over the previous year.

**3,8%**  
INCREMENT  
OF MARITIME IMPORTS

## FAR FROM PRE-PANDEMIC LEVELS

Despite the slight rebound in Spain's trade with the rest of the world in 2025, traffic still stands 7% below 2019 levels.

	2025	%25/24	%25/19	2024	2023
U.S.A.	36.5	+14%	+63%	31.9	33.2
Brazil	19.8	-2%	+25%	20.3	17.9
China	11.6	+13%	+26%	10.3	9.7
Morocco	10.3	+2%	+8%	10.1	10.5
Nigeria	10.1	-7%	-33%	10.9	11.1
United Kingdom	9.9	-1%	-9%	10.0	10.9
Mexico	9.9	-7%	-10%	10.6	9.3
Canada	9.5	+42%	+86%	6.7	7.8
Türkiye	9.0	+10%	-3%	8.2	6.8
Algeria	8.3	+64%	+11%	5.1	4.4
Netherlands	8.1	-2%	+6%	8.3	7.6
Italy	8.1	-8%	-16%	8.8	8.7
France	7.9	-13%	-23%	9.1	8.9
Saudi Arabia	7.1	+16%	-31%	6.1	6.2
Belgium	5.2	+28%	+17%	4.1	3.8
Libia	5.1	+14%	-45%	4.4	5.0
Egypt	4.4	+17%	+56%	3.8	3.5
Ukraine	4.3	-64%	-47%	11.8	9.2
India	3.5	+4%	+16%	3.4	3.9
Iraq	3.4	+39%	-32%	2.4	3.4
Russia	3.3	-33%	-72%	4.9	5.6
Kazajstan	3.2	-1%	-1%	3.2	3.6
Angola	2.9	-28%	+19%	4.1	4.4
Germany	2.9	-6%	+38%	3.1	3.8
Portugal	2.8	+5%	-24%	2.7	3.1
Guinea	2.5	-1%	-43%	2.5	2.2
Guyana	2.3	+6%	>999%	2.2	0.7
Argentina	2.1	-4%	-35%	2.2	1.9
Norway	2.1	-25%	-51%	2.8	2.9
<b>TOTAL</b>	<b>280.5</b>	<b>+1%</b>	<b>-7%</b>	<b>276.9</b>	<b>279.8</b>

Million tonnes. 2024 preliminary Source: Datacomex.

Transportation risks is our expertise, so you can focus on the destination.

**PIB Group Iberia**, an insurance broker specialised in the maritime transport sector.

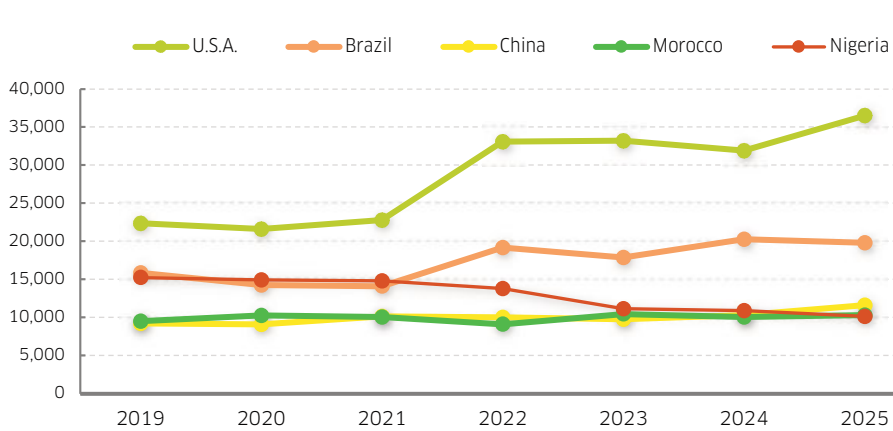




PIB GROUP IBERIA. CORREDURÍA DE SEGUROS Y REASEGUROS, S.A.U. Civil Liability and Surety Insurance contracted in accordance with Article 157 of Royal Decree-Law 3/2020, of February 4. N.I.F.: A58564816 Registered in the Barcelona Mercantile Registry, Sheet B-97.573, Volume I.R.U.S. 1000327207147, Page 0. Authorized by DGSFP J-0924/RJ-0113.

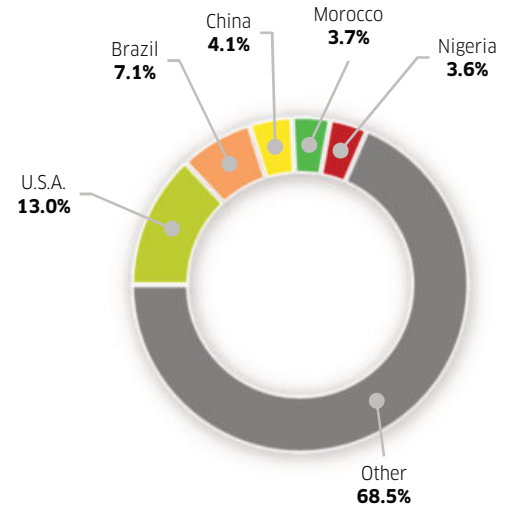
**ABOVE 10 MILLION TONNES**

The top five trading partners account for 31% of Spain's foreign trade by sea.



Million tonnes. Source: Datacomex.

YEAR 2025



**The Netherlands overtakes within the EU**

Within the European Union, following the United Kingdom's departure, the Netherlands leads the ranking after overtaking Italy and France. Trade flows exceeded 8.1 million tonnes, 2 per cent less than a year earlier. The main category is energy products, accounting for more than half of the total. Semi-manufactures also stand out, with 2 million tonnes, as do raw materials, which rise to almost 1.2 million tonnes.

Close on the heels of the Netherlands comes Italy, with traffic of 8.1 million tonnes (-8 per cent), and France, with a mari-

time flow of 7.9 million tonnes (-13 per cent).

The United Kingdom remains Europe's leading trading partner with Spain. Trade with Spain in 2025 came close to 10 million tonnes, 1 per cent less than a year earlier.

Among Spain's leading trading partners, Morocco also stands out, in fourth place in the ranking. In 2025, maritime trade flows with Spain exceeded 10.3 million tonnes, with growth of 2 per cent over the previous year. Energy products, semi-manufactures and raw materials account for 74 per

cent of Spain's foreign trade with the North African country.

As regards the breakdown by sectors, energy products once again stood out, with traffic of 131.1 million tonnes in inbound and outbound flows, representing almost half of Spain's total foreign trade by sea. Specifically, 47 per cent. They are followed by semi-manufactures, with 50.4 million tonnes and an 18 per cent share, and raw materials, with a flow of 42.6 million tonnes, and food, beverages and tobacco, with 41.1 million tonnes, both sectors accounting for 15 per cent.

 <p><b>HOLDING M. CONDEMINAS</b></p>	 <p><b>ERGRANSA</b> SILOS CONDEMINAS</p>	<p><b>SERVICES AND INFRASTRUCTURE</b> <a href="http://www.ergransa.es">www.ergransa.es</a></p> <ul style="list-style-type: none"> <li>Dedicated quay: 241 metres in length</li> <li>Draught alongside: 39 feet (12 metres)</li> <li>Vertical silos with capacity for 145,000 tons of fluent agrifood products</li> <li>Horizontal silos with capacity for 50,000 tons of non-fluent agrifood products</li> <li>Pneumatic unloading</li> <li>Loading/unloading truck and rail</li> <li>Weighing and additional services</li> <li>Traceability and preserved identity</li> </ul> <p><b>ERGRANSA Silos Condeminas</b> Muelle Contradique s/n 08039 Barcelona (Spain) +34 93 443 37 16 silos@ergransa.es</p> 
<p><b>HEADQUARTERS AND MANAGEMENT World Trade Center (WTCB)</b> Moll de Barcelona s/n • Edificio Este, 5th floor 08039 Barcelona (Spain) +34 932 954 580 gerencia@ergransa.es</p>	 <p><b>DISTRICENTER</b> Logística a medida</p>	<p><b>SERVICES AND INFRASTRUCTURE</b> <a href="http://www.districtcenter.es">www.districtcenter.es</a></p> <ul style="list-style-type: none"> <li>Contract Logistics</li> <li>Ecommerce and B2B logistics</li> <li>Reverse logistics</li> <li>Warehousing and RFID management</li> <li>Distribution and transport management</li> <li>Value-added services</li> <li>Internal pouch services</li> <li>Container unloading</li> <li>In-house logistics</li> <li>Customer service centre</li> <li>Data Analytics</li> <li>Strategic consulting</li> <li>Marketplace management</li> </ul> <p><b>SECTORS</b> Fashion, Retail, Editorial, Ecommerce, FMCG, Financial institutions, Servicing for real estate, Consumer goods, Others.</p> <p><b>LOCATIONS</b> +80.000m<sup>2</sup> Barcelona, Tarragona, Madrid, Guadalajara, Balearic Islands, Canary Islands</p> <p><b>DISTRICENTER Custom logistics</b> Zona Franca Ind. Estate Sector B, B St, no. 7 08040 Barcelona (Spain) +34 932 643 940 districtcenter@districtcenter.es</p> 

SPANISH FOREIGN TRADE | INTERNATIONAL MARITIME TRANSPORT BY REGIONS

SPANISH MARITIME TRADE BY REGIONS

	2025	%25/24	%25/19	2024	2019	SHARE 2025	2019
North and Central America	58,547	+12%	+34%	52,075	43,605	21%	15%
European Union	47,041	+1%	-10%	46,646	52,217	17%	17%
South America	31,714	-6%	+11%	33,583	28,454	11%	9%
Europe excluding EU	30,866	-23%	-36%	40,166	48,033	11%	16%
North Africa	29,767	+19%	-3%	24,975	30,689	11%	10%
Sub-Saharan Africa	26,458	-1%	-19%	26,647	32,716	9%	11%
Middle East	17,143	+24%	-29%	13,824	24,275	6%	8%
Asia excluding M.E. and China	16,983	-5%	-17%	17,944	20,503	6%	7%
China	11,615	+13%	+26%	10,286	9,203	4%	3%
Oceania	1,979	+5%	+30%	1,889	1,516	1%	1%
Other destinations	8,429	-5%	-8%	8,883	9,178	3%	3%
<b>TOTAL</b>	<b>280,543</b>	<b>+1%</b>	<b>-7%</b>	<b>276,916</b>	<b>300,389</b>		

EUROPEAN UNION

EXPORTS	2025	%25/24	%25/19
Fuel, mineral oil	9,904	-10%	-33%
Salt, gypsum, stone	4,656	+9%	+74%
Iron and steel foundry	1,607	+19%	+12%
Inorganic chemical products	1,063	+30%	+14%
Other chemical products	934	+1%	-41%
Other	6,368	-21%	-15%
<b>TOTAL</b>	<b>24,531</b>	<b>-7%</b>	<b>-15%</b>
IMPORTS	2025	%25/24	%25/19
Fuel, mineral oil	8,430	+6%	+4%
Cereals	3,922	+22%	-14%
Iron and steel foundry	2,446	+6%	-28%
Salt, gypsum, stone	1,966	+13%	+46%
Other chemical products	754	+107%	+78%
Other	4,991	+8%	-8%
<b>TOTAL</b>	<b>22,510</b>	<b>+12%</b>	<b>-3%</b>

NORTH AND CENTRAL AMERICA

EXPORTS	2025	%25/24	%25/19
Salt, gypsum, stone	4,617	-13%	+33%
Fuel, mineral oil	1,770	-27%	-50%
Ceramic products	1,201	+0%	-2%
Iron and steel foundry	379	-13%	-23%
Drinks (except juices)	357	-1%	+64%
Other	3,901	-12%	-11%
<b>TOTAL</b>	<b>12,224</b>	<b>-14%</b>	<b>-8%</b>
IMPORTS	2025	%25/24	%25/19
Fuel, mineral oil	32,690	+16%	+54%
Cereals	5,318	+224%	+551%
Minerals, scoria, ashes	3,600	+7%	+22%
Oilseeds	1,200	-19%	-22%
Fruit	500	+1%	+31%
Other	3,015	+9%	-8%
<b>TOTAL</b>	<b>46,323</b>	<b>+22%</b>	<b>+53%</b>

NORTH AFRICA

EXPORTS	2025	%25/24	%25/19
Fuel, mineral oil	4,343	-3%	-17%
Salt, gypsum, stone	677	+78%	-38%
Inorganic chemical products	579	+22%	-8%
Iron and steel foundry	520	+29%	-53%
Ceramic products	513	+14%	-40%
Other	4,406	+15%	-4%
<b>TOTAL</b>	<b>11,039</b>	<b>+10%</b>	<b>-18%</b>
IMPORTS	2025	%25/24	%25/19
Fuel, mineral oil	11,569	+25%	-10%
Salt, gypsum, stone	2,921	+60%	+206%
Fertilizer	943	+26%	+5%
Inorganic chemical products	618	+32%	+7%
Fresh vegetables	407	+0%	+41%
Other	2,270	+1%	+37%
<b>TOTAL</b>	<b>18,729</b>	<b>+25%</b>	<b>+9%</b>

SOUTH AMERICA

EXPORTS	2025	%25/24	%25/19
Salt, gypsum, stone	2,191	+9%	+29%
Inorganic chemical products	983	+11%	-37%
Fuel, mineral oil	709	-26%	-51%
Fertilizer	369	-31%	+94%
Sets of other products	199	+28%	+18%
Other	1,776	+7%	-15%
<b>TOTAL</b>	<b>6,228</b>	<b>+0%</b>	<b>-13%</b>
IMPORTS	2025	%25/24	%25/19
Fuel, mineral oil	12,655	-18%	+96%
Food industry waste	3,566	+24%	+24%
Oilseeds	2,019	-10%	+17%
Minerals, scoria, ashes	1,929	-18%	-52%
Cereals	1,675	+52%	-48%
Other	3,643	+9%	+22%
<b>TOTAL</b>	<b>25,486</b>	<b>-7%</b>	<b>+20%</b>

SUB-SAHARAN AFRICA

EXPORTS	2025	%25/24	%25/19
Salt, gypsum, stone	3,395	-3%	-8%
Fuel, mineral oil	1,020	+7%	+4%
Ceramic products	492	+5%	-15%
Drinks (except juices)	308	+22%	+21%
Sets of other products	126	+2%	-4%
Other	1,329	-3%	-18%
<b>TOTAL</b>	<b>6,670</b>	<b>+0%</b>	<b>-8%</b>
IMPORTS	2025	%25/24	%25/19
Fuel, mineral oil	14,141	-8%	-25%
Minerals, scoria, ashes	4,099	+39%	-17%
Cocoa and preparations	160	-1%	-5%
Fish, crustaceans, molluscs	156	+1%	-10%
Iron and steel foundry	149	-2%	-15%
Other	1,083	-4%	-7%
<b>TOTAL</b>	<b>19,788</b>	<b>-1%</b>	<b>-22%</b>

Spanish imports and exports with the origin/destination indicated, by sea.

EUROPE EXCLUDING EU

EXPORTS	2025	%25/24	%25/19
Salt, gypsum, stone	3,657	-2%	+10%
Fuel, mineral oil	2,765	-15%	-44%
Motor vehicles	774	+1%	+144%
Iron and steel foundry	743	-15%	-7%
Ceramic products	498	+3%	-4%
Other	4,201	-10%	+3%
<b>TOTAL</b>	<b>12,638</b>	<b>-8%</b>	<b>-10%</b>
IMPORTS	2025	%25/24	%25/19
Fuel, mineral oil	5,410	-19%	-66%
Salt, gypsum, stone	3,300	+33%	-28%
Cereals	3,064	-72%	-48%
Cereals	1,790	+15%	-36%
Fats, animal or vegetable oil	779	-9%	+59%
Other	3,883	-4%	-14%
<b>TOTAL</b>	<b>18,227</b>	<b>-31%</b>	<b>-46%</b>

SPANISH MARITIME TRADE BY PRODUCTS

	2025	%25/24	%25/19	2024	2019	CUOTA 2025	2019
Paper, cardboard and manuf.	2,199	+6%	-0%	2,081	2,205	0.8%	0.7%
Madera y sus manufacturas	2,125	+1%	+21%	2,100	1,752	0.8%	0.6%
Iron and steel foundry manuf.	2,016	+0%	+15%	2,008	1,755	0.7%	0.6%
Machines and mechanic devices	1,898	+5%	+10%	1,809	1,722	0.7%	0.6%
Fruit/unpreserved fruit	1,879	+1%	+12%	1,869	1,680	0.7%	0.6%
Electrical goods	1,791	+5%	+29%	1,707	1,383	0.6%	0.5%
Meat	1,401	+2%	+8%	1,375	1,294	0.5%	0.4%
Preserved vegetables or fruit, juices	1,359	+6%	+26%	1,284	1,076	0.5%	0.4%
Fish, crustaceans, molluscs	1,220	+6%	-7%	1,153	1,307	0.4%	0.4%
Fresh vegetables	1,200	-1%	-5%	1,210	1,259	0.4%	0.4%
Aluminium and manufacturing	1,051	+4%	+4%	1,010	1,008	0.4%	0.3%
Stone and gypsum manufactures	1,013	-8%	-19%	1,107	1,244	0.4%	0.4%
Other	11,320	+9%	+8%	10,362	10,489	4.0%	3.5%
<b>TOTAL</b>	<b>280,543</b>	<b>+1%</b>	<b>-7%</b>	<b>276,916</b>	<b>300,389</b>		

CHINA

EXPORTS	2025	%25/24	%25/19
Minerals, scoria, ashes	735	+11%	-31%
Meat	504	-7%	-24%
Fuel, mineral oil	291	+108%	+82%
Plastic material and manuf.	175	-19%	-4%
Salt, gypsum, stone	154	+11%	-51%
Other	899	+6%	-38%
<b>TOTAL</b>	<b>2,757</b>	<b>+8%</b>	<b>-28%</b>
IMPORTS	2025	%25/24	%25/19
Electrical goods	981	+9%	+91%
Machines and mechanic devices	829	+12%	+67%
Iron and steel foundry manuf.	628	+18%	+100%
Organic chemical products	570	+20%	+105%
Plastic material and manuf.	518	+24%	+132%
Other	5,334	+14%	+51%
<b>TOTAL</b>	<b>8,858</b>	<b>+14%</b>	<b>+65%</b>

MIDDLE EAST

EXPORTS	2025	%25/24	%25/19
Oilseeds	891	+78%	+10%
Ceramic products	861	+7%	-37%
Fuel, mineral oil	668	+40%	+6%
Salt, gypsum, stone	260	+47%	+112%
Paper, cardboard and manuf.	189	+11%	+17%
Other	1,649	-1%	-18%
<b>TOTAL</b>	<b>4,518</b>	<b>+19%</b>	<b>-11%</b>
IMPORTS	2025	%25/24	%25/19
Fuel, mineral oil	10,785	+30%	-38%
Organic chemical products	430	-17%	-30%
Plastic material and manuf.	413	-5%	+9%
Aluminium and manufacturing	194	+10%	+45%
Iron and steel foundry	172	+171%	+328%
Other	631	+16%	+24%
<b>TOTAL</b>	<b>12,626</b>	<b>+26%</b>	<b>-34%</b>

ASIA EXCLUDING M.E. AND CHINA

EXPORTS	2025	%25/24	%25/19
Pulp, recycled paper	829	+24%	+84%
Meat	593	+5%	+52%
Fuel, mineral oil	377	+23%	-42%
Plastic material and manuf.	296	-16%	-10%
Oilseeds	219	+71%	+226%
Other	2,261	-5%	-15%
<b>TOTAL</b>	<b>4,575</b>	<b>+4%</b>	<b>+0%</b>
IMPORTS	2025	%25/24	%25/19
Fuel, mineral oil	4,217	-9%	-47%
Iron and steel foundry	2,679	-9%	+121%
Fats, animal or vegetable oil	775	-25%	-51%
Plastic material and manuf.	455	+13%	+27%
Organic chemical products	445	+0%	-28%
Other	3,836	-7%	-8%
<b>TOTAL</b>	<b>12,408</b>	<b>-8%</b>	<b>-22%</b>

SPANISH FOREIGN TRADE | IMPORT-EXPORT

# GATEWAY TO GLOBAL TRADE

PORTS CHANNEL 66% OF TRADE FLOWS BETWEEN SPAIN AND THE REST OF THE WORLD, WITH 283 MILLION TONNES HANDLED IN 2025

Spain's geostrategic position is strengthening the role of its ports as intercontinental logistics hubs, essential links in the exchange of goods with the rest of the world.

The provisional statistics provided by the Ministry of Industry, Trade and Tourism leave no room for doubt (see accompanying table).

The 46 ports of general interest channel 66 per cent of Spain's foreign trade, with 282.8 million tonnes handled in 2025, according to Puertos del Estado data. In other words, they channel two thirds of Spain's foreign trade.

This performance positions ports not only as gateways for goods entering and leaving the country, but also as key economic players and drivers of industry and logistics.

A more detailed analysis of traffic reveals that the 28 port authorities together handled half of exports and 77 per cent of imports.

## Liquid bulk leads the way

By cargo type, liquid bulk dominates foreign trade operations at ports. Spanish ports handled a total of 124 million tonnes in 2025, combining imports and exports, which represents 44 per cent of trade flows by sea.

Within this category, the ranking is led by the Port Authority of Cartagena, with 23.5 million tonnes. Of the total, 80 per cent corresponds to imports.

Next come Bilbao, with 17.8 million tonnes, Tarragona (16.3 million tonnes) and Huelva (16 million tonnes).

Beyond imports and exports, liquid bulk traffic exceeded 180.4 million tonnes, with growth of 0.9 per cent com-

pared with the previous year. This type of cargo, closely linked to the energy and chemical industries, is vital for strategic sectors such as refining and petrochemicals, reinforcing the role of ports in the global supply chain.

General cargo, for its part, accounts for 30 per cent of total maritime imports and exports. In 2025, ports handled 85.1 million tonnes, 4 per cent more than a year earlier. It was a balanced traffic flow between inbound cargo, at 40.8 million tonnes, and outbound cargo, at 44.3 million tonnes.

In this cargo category, the Port Authority of Valencia is top of the class. Last year, the authority handled 26.6 million



tonnes in inbound and outbound flows. This figure represents 31 per cent of general cargo imports and exports. In other words, more than three out of every ten tonnes move through the quays of the port of Valencia.

Valencia is the main ally of Spanish foreign trade.





It is followed by Barcelona, with 18.1 million tonnes, Algeciras, with 11 million tonnes, and Bilbao, which last year handled 6.8 million tonnes of general cargo.

In 2025, Spanish ports exceeded the threshold of 18.6 million TEU (+2.7 per cent), setting a new activity record.

(continued on page 104)

44%

LIQUID BULK,  
THE LEADING PLAYER  
IN FOREIGN TRADE  
BY SEA

## ALLIES OF SPANISH FOREIGN TRADE

Valencia ranked in 2025 as the leading port for Spain's foreign trade flows after climbing several positions. In 2025, import-export flows exceeded 32.3 million tonnes.

	2025			%25/24			%25/19		
	EXP	IMP	TOTAL	EXP	IMP	TOTAL	EXP	IMP	TOTAL
Valencia	17.4	14.9	32.3	+8%	+3%	+6%	+25%	-8%	+7%
Cartagena	23.9	7.4	31.3	-0%	-14%	-4%	+2%	+0%	+1%
Barcelona	18.4	11.8	30.1	+5%	-2%	+2%	+1%	-3%	-1%
Bilbao	21.4	7.6	29.0	-5%	-13%	-7%	-2%	-24%	-9%
Bahía de Algeciras	17.4	8.7	26.1	+2%	-0%	+1%	+3%	+9%	+5%
Tarragona	20.9	3.6	24.5	-7%	-15%	-9%	-7%	-9%	-8%
Huelva	15.7	5.5	21.2	-5%	-11%	-7%	-14%	-9%	-13%
Castellón	13.3	2.9	16.2	+8%	-8%	+5%	+6%	-41%	-8%
Gijón	10.7	3.2	13.9	+6%	+3%	+6%	-11%	+16%	-6%
A Coruña	8.9	2.6	11.5	-2%	-5%	-3%	+2%	+0%	+1%
Ferrol - San Cibrao	4.8	1.8	6.5	+8%	+9%	+8%	-45%	-22%	-40%
Santander	3.1	2.7	5.9	-5%	+6%	-0%	-10%	+11%	-1%
Almería	0.9	3.7	4.6	+2%	+10%	+8%	-41%	+30%	+5%
Avilés	2.1	2.2	4.3	-3%	+11%	+4%	-24%	+16%	-8%
Vigo	1.9	2.0	3.9	+4%	+2%	+3%	+33%	+23%	+28%
Pasaia	2.2	1.1	3.3	+1%	+0%	+0%	+26%	-17%	+7%
Las Palmas	2.2	0.9	3.0	+9%	+87%	+24%	-1%	-1%	-1%
Sevilla	2.2	0.6	2.9	+7%	-2%	+5%	+6%	-36%	-8%
Marín - Pontevedra	1.6	0.6	2.2	-10%	-10%	-10%	+9%	-22%	-2%
Bahía de Cádiz	1.2	0.7	1.9	+15%	+9%	+13%	+11%	-19%	-2%
Motril	1.2	0.7	1.9	-17%	+27%	-4%	+75%	+5%	+40%
Málaga	1.0	0.6	1.6	-0%	+11%	+4%	+8%	-38%	-14%
Alicante	0.7	0.7	1.5	-19%	-18%	-19%	+58%	-43%	-17%
S.C. Tenerife	1.1	0.3	1.4	+11%	-11%	+6%	-26%	-32%	-27%
Vilagarcía	0.8	0.3	1.1	+4%	+0%	+3%	+24%	+26%	+25%
Ceuta	0.4	0.1	0.5	+23%	>999%	+41%	+34%	+120%	+42%
Baleares	0.3	0.0	0.3	-42%	-13%	-41%	-25%	-76%	-30%
Melilla	0.0	0.0	0.0	+475%	-	>999%	-100%	-95%	-99%
<b>TOTAL</b>	<b>195.7</b>	<b>87.1</b>	<b>282.8</b>	<b>+0%</b>	<b>-3%</b>	<b>-1%</b>	<b>-2%</b>	<b>-7%</b>	<b>-4%</b>

Datos en millones de toneladas. Fuente: Puertos del Estado.



# R U D D E R

## MARINE SERVICES & SHIP REPAIRS



### TECHNICAL SHIP REPAIR SERVICES

- MIG / TIG / electrode welding (class certified)
- Deck and hull repair works
- Reliable technical solutions afloat under class supervision
- Logistics & Spare Parts & warehousing

### CREW SERVICES AND MEDICAL

- Crew change, visa & formalities
- Barge services and personnel handling
- On-board medical emergencies & evacuation
- Hospitalization and specialist appointment





Rudder Marine services and ship repairs

(from page 103)

Lastly, imports and exports of dry bulk reached 73.3 million tonnes, representing a decline of 4 per cent. This drop was caused by the fall in coal, in line with national and European energy policy, as well as by the fall in cereals, due to a strong domestic harvest after years of drought. This cargo category represents 26 per cent of total maritime imports and exports.

### VALENCIA, LEADING PORT IN IMPORT-EXPORT TRAFFIC

The ranking is led by the Port Authority of Gijón, which handled 11.3 million tonnes in 2025. It is followed by the ports of Castellón, with 7.8 million tonnes, Cartagena (6.9 million tonnes) and Tarragona (6.3 million tonnes). This segment is closely linked to industrial activity, especially the production of cement, steel and chemical products, all of them essential for sectors such as construction and automotive.

#### Valencia, an ally of trade

A closer analysis of Puertos del Estado's provisional statistics reveals that Valencia is the main ally of Spanish foreign trade. The Port Authority handled 32.2 million tonnes of import-export traffic in 2025, almost 6 per cent more than a year earlier, allowing the port to climb from third place to the top of the ranking.

Second place, thanks to the weight of liquid bulk, goes to Cartagena, with 31.2 million tonnes handled, representing a decline of 4 per cent.

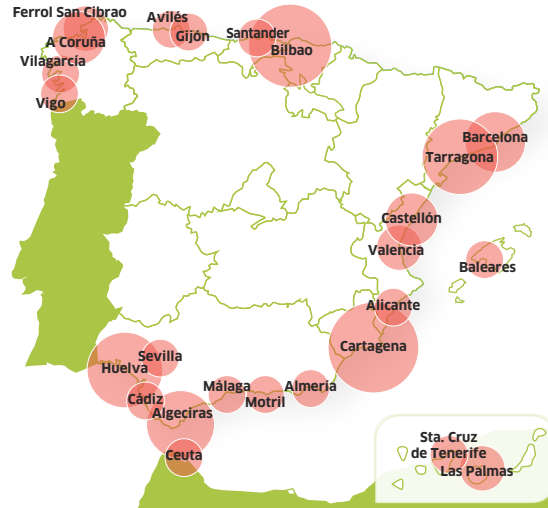
Completing the podium is the port of Barcelona, which climbs one place. The Port Authority handled 30.1 million tonnes in imports and exports, 2 per cent more than in 2024.

The ports of Bilbao, with 28.9 million tonnes of import-export traffic, and Algeciras, with a flow of 26 million tonnes, complete the top five, which together account for more than half of port foreign trade operations, specifically 52.6 per cent.

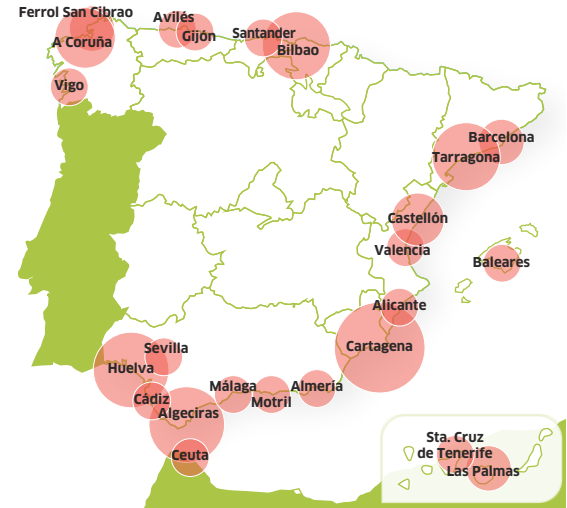
## UNBALANCED FLOWS

Spanish exports by sea, with traffic of close to 196 million tonnes in 2025, represent 69% of total flows. Imports, the remaining 31%, amounted to 87.1 million tonnes.

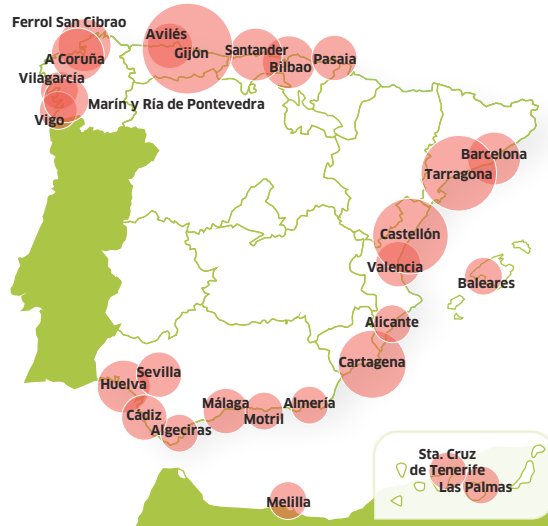
### LIQUID BULK IMPORT



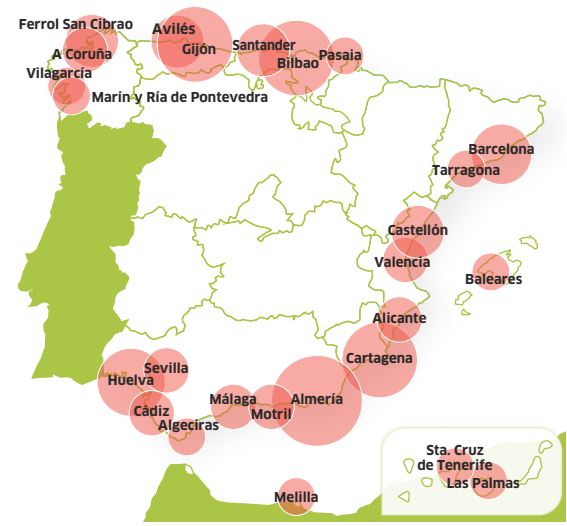
### LIQUID BULK EXPORT



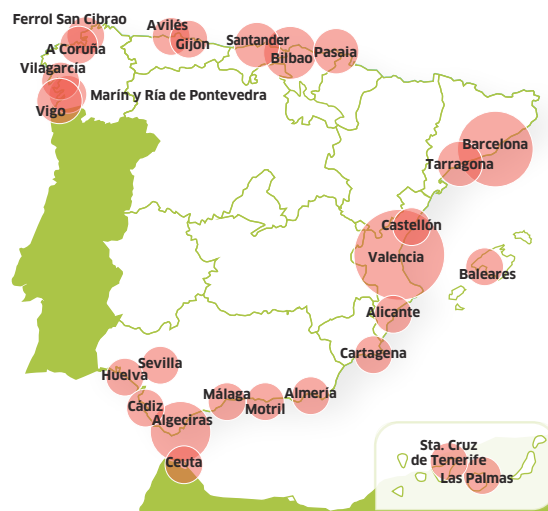
### DRY BULK IMPORT



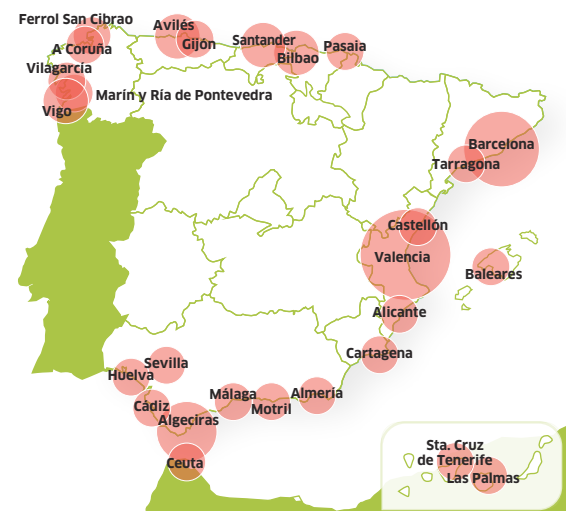
### DRY BULK EXPORT



### GENERAL CARGO IMPORT



### GENERAL CARGO EXPORT



Source: Puertos del Estado.

# THE BEST INFORMATION ON LOGISTICS ALWAYS AT YOUR FINGERTIPS

[www.transportexxi.com](http://www.transportexxi.com)

**FREE**  
FOR SUBSCRIBERS

**FOLLOW US:**  
@TransporteXxi   
[company/TransporteXXI](https://www.linkedin.com/company/TransporteXXI) 

**MORE INFO:**  
(+34) 944 400 000  
[suscripciones@grupoxxi.com](mailto:suscripciones@grupoxxi.com)



# PORTS GIVE US SHAPE

We connect sea and land to  
contribute to economic,  
environmental and social  
development of Spain



GOBIERNO  
DE ESPAÑA

MINISTERIO  
DE TRANSPORTES  
Y MOVILIDAD SOSTENIBLE

Puertos del Estado

