

Lloyd's List 

ONE HUNDRED PORTS 2021





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Linton Nightingale
One Hundred Ports Editor

An exceptional year

2020 will live long in the memory as a year that was overshadowed by a remorseless pandemic causing untold disruption for the container port industry

The latest edition of Lloyd's List's One Hundred Ports tallies traffic that passed across the docks of the world's elite container-handling facilities in 2020 — arguably the most challenging year the industry has ever experienced.

First came the harsh reality of the pandemic-led recession and the subsequent volume crash, followed by congestion carnage as cargo traffic rebounded in the second half of the year, squeezing port capacity to its limit, with supply chains clogged the world over.

Despite the second-half resurgence, buoyed by the lifting of global lockdowns, 2020 witnessed the first fall in combined throughput figures for the world's largest container ports since the impact of the 2008-2009 global financial crisis.

Volume totals of just over 632.2m teu in 2020 were down 0.7% year on year.

Against the odds, some ports did report success stories over the 12 months; but for the overwhelming majority, volumes flattered to deceive.

The year 2020 was a challenging one for us all — and a truly exceptional one for the container ports industry.

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Port in a storm: the extent of the collapse in volumes in the second quarter of last year at the height of the pandemic made it hard to fathom any sort of recovery in 2020.

Robert Evans/Alamy Stock Photo

One Hundred Ports: Riding out the storm

The initial outbreak of the coronavirus pandemic brought a volume bloodbath to the container port sector in the first half of 2020, but as the world emerged from lockdown restrictions, the box business mounted a second-half recovery

NOT since the global financial crisis of 2008-2009 has the container port sector had to withstand a shockwave of the same magnitude as the one it faced in 2020.

The upheaval caused by the coronavirus pandemic impacted shipping and supply chains the world over, bringing untold disruption to port and terminal operations.

Emanating from China early last year, the virus spread across the globe apace, prompting government-enforced lockdowns to stem the tide of infection rates.

As the main consumption economies effectively shut up shop, the huge demand-side shock became evident.

Preliminary analyst projections at the halfway point of 2020 pointed to a drop in global port volumes approaching double-digit percentiles. The industry looked all set to be reeling off the back of by far and away its worst 12-month period in more than a decade — and then some.

Forecasts were, however, shrouded in uncertainty, having been thrown the ultimate curveball at the hands of coronavirus, as articulated in last year's edition of One Hundred Ports.

The extent of the collapse in volumes in the second quarter of 2020 at the height of the

pandemic made it hard to fathom any sort of recovery in the latter part of the year.

Yet as lockdown restrictions started to be lifted and the first wave of the virus petered out in numerous countries and key trading regions, box business began slowly to rebound.

China led the initial charge. The enforcement of strict measures by the Chinese government to contain the virus ensured the country came out of the other side of the first wave faster than many anticipated.

By the end of the second quarter, manufacturing production had ramped up to 'normal' levels.

The pace of the recovery not just in China but in other parts of Asia, Europe and North America — most notably the US — in the second half of 2020 took many by surprise, not least container lines.

They struggled throughout to deploy and reposition empty containers to match demand surges as countries and their economies came out of lockdown.

As the issue escalated, port congestion became an all-too-common theme at ports globally in the second half of 2020 — a situation that persists today.

Indeed, fiscal stimulus packages employed across the west led to an unprecedented rise in demand

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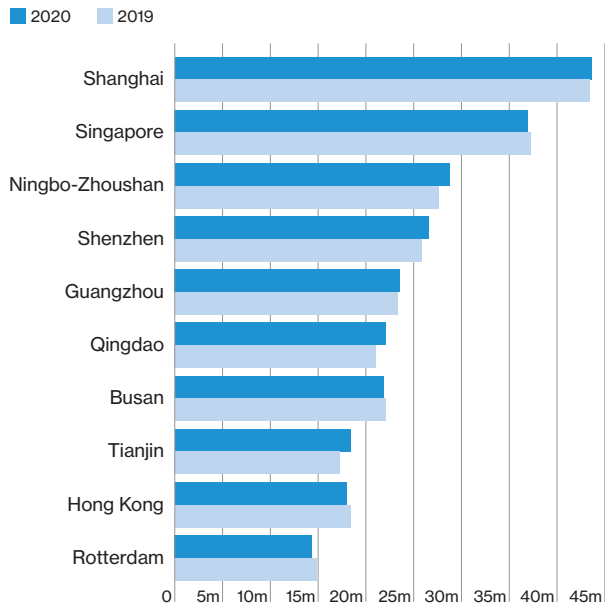
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Top 10 ports (2020 vs 2019 teu figures)



Sources: Port authorities/government agencies/terminal operators/Dynamar

for consumer goods, buoying containerised trade in the process as spending patterns changed.

The rapid recovery from the Covid-19-induced downturn in containerised freight in the latter months of 2020 was not felt evenly across all regions, however, with some remaining below their pre-pandemic volumes.

Yet it was the transpacific trade that stole the headlines, boosting port volumes at both origin and destination ports, while Asia-Europe traffic also helped elevate box numbers at the tail end of 2020, to further assist in closing the first-half demand deficit.

According to London-based analysts Drewry, the second-half surge on these key trade lanes ensured that the global reduction in port handling was reigned in at just 1.2% for the full year. The figure was a far cry from earlier analyst projections.

For the top 100 container ports in this year's Lloyd's List rankings, the volume shortfall in 2020 against 2019 came in at a minimal 0.7%, dropping from 636.6m teu to 632.2m teu, as the container port industry managed to ride out the Covid storm much better than expected.

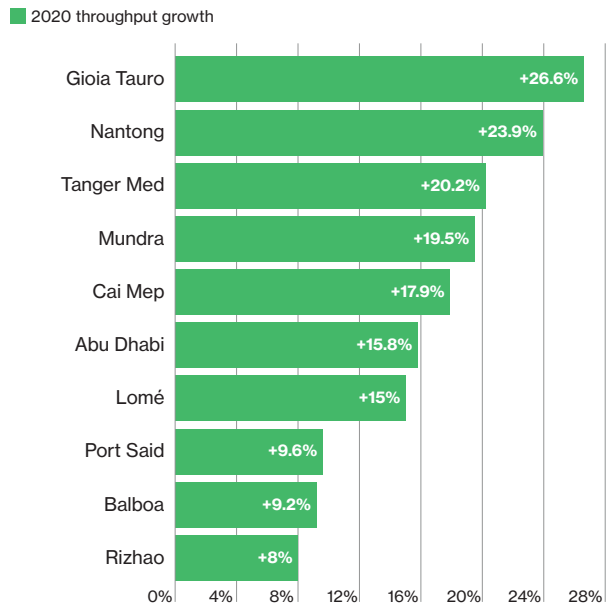
Top 10

Unsurprisingly, the crown for the world's largest container port in 2020 was once again the Chinese colossus Shanghai. This was the port's 11th consecutive year at the top of the Lloyd's List rankings.

Even in the face of Covid uncertainty, the port still managed to post throughput figures of 43.5m teu, as volumes edged up 0.5% year on year.

The feat was even more impressive considering Shanghai, the largest economic and trading hub in China, witnessed a near-7% drop in the first half of

Top 100 winners



Sources: Port authorities/government agencies/terminal operators/Dynamar

2020. This, too, provides an indication of the strength of China's import and export trade recovery in the second half of the year.

Singapore maintained second position in the rankings. However, at the half-year point, the transshipment mega hub did manage to reduce Shanghai's lead to just 2m teu, suggesting it could threaten top spot by the year's close.

Despite volumes improving in the second half, Singapore saw liftings drop back 0.9% to 36.8m teu — and still some way off the grand total of Shanghai.

Nevertheless, there is still an expectation that Singapore could usurp its Chinese rival in the coming years with the opening of its Tuas port complex, to which box operations will slowly be transferred.

The first berths at the new site, located at the far western point of the island state, will open later this year. By 2040, Tuas is expected to be fully operational, boasting a planned capacity of an eye-watering 65m teu.

In terms of the rankings, there was no change in the top five.

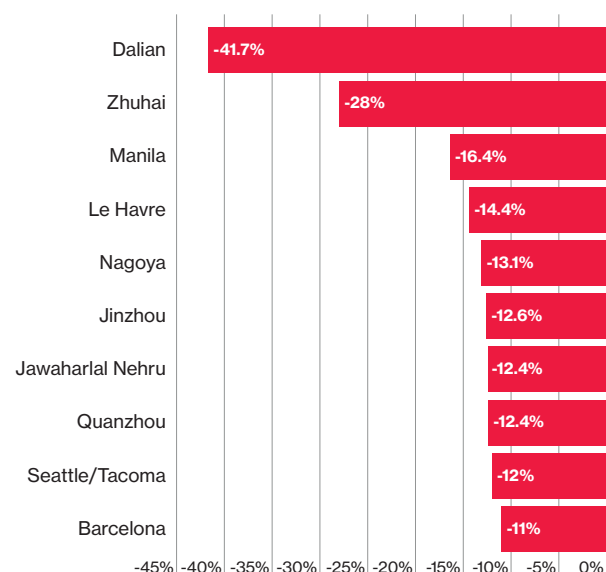
Third-placed Ningbo-Zhoushan achieved a more-than respectable 4.3% jump in volumes to 28.7m teu, as counter-measures to overcome virus-led disruption paid dividends.

This helped narrow the gap with Singapore — but if lofty ambitions set by local government to achieve handling figures of 40m teu by 2025 are realised, there could be a Chinese one-two at the top of the rankings before long.

Shenzhen and Guangzhou, in third and fourth positions, respectively, were chased down by Chinese compatriot Qingdao, swapping places with South Korea's Busan to take sixth spot on 2020 teu totals.

Top 100 losers

■ 2020 throughput decline



Sources: Port authorities/government agencies/terminal operators/Dynamar

Behind Busan, China's Tianjin, a main gateway for the capital Beijing, leapfrogged Hong Kong, which continues to slide down the rankings.

The Dutch port of Rotterdam once again propped up the top 10, holding onto its status as both the largest port in Europe and the biggest outside Asia.

China

China's role in global box trade cannot be understated and it stands to reason why it holds the tag as the 'world's factory'.

The country's ports once again dominated the rankings and, with the new additions of Nantong and Qinzhou this year, China now represents as much as one-quarter of entrants.

In all, seven of the top 10 ranking positions are held by Chinese ports — including four of the top five. And, of course, China's principal economic and trading hub, Shanghai, lays claim to being the world's largest container port.

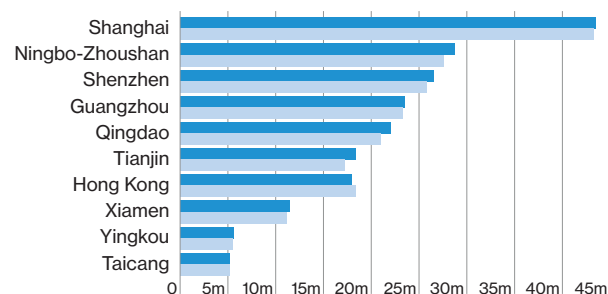
China's importance to global containerised trade can be no better illustrated than by the fact that just shy of 40% of the total teu liftings recorded in Lloyd's List's rankings were moved across its docks.

With Chinese fortunes central to that wider container port sector, the country's quick Covid recovery, led by the government's draconian measures to suppress the virus, was crucial to the turnaround of the industry in the second half of 2020.

The fact that China's manufacturing machine got back up and running so quickly ensured it was ready to fulfil the strong demand for containerised trade following the initial Covid downturn, particularly from western markets.

China's top 10 ports in 2020

■ 2020 throughput (teu) ■ 2019 throughput (teu)



Sources: Port authorities/government agencies/terminal operators/Dynamar



Despite a torrid start to 2020, the majority of Chinese ports managed to achieve volume growth against the odds and significant Covid headwinds.

Nevertheless, total volumes from the Chinese contingent were relatively flat against 2019 totals, up just 0.1%.

The largest growth figure came from debutant Nantong at 23.9%, with Rizhao (8%) next best in making significant strides up the rankings ladder.

However, the dubious honour of being the worst-performing port — not only in China, but across the top 100 ports — went to Dalian.

Here, volumes dropped back more than 3m teu, or nearly 42%, as Covid added further pain to the weak trade conditions the port experienced in 2019.

Asia, excluding China

Outside of China, performances at other Asian ports in 2020 were mixed, to say the least.

Again, Covid had a major part to play at both a regional and national level, and on a port-by-port basis — but again it was story of two halves.

The initial Covid outbreak played havoc with port operations in the early part of 2020, as government restrictions on the movement of goods and people resulted in numerous terminal closures, labour shortages and lower manufacturing outputs.

The region managed to claw back significant traffic in the second half of 2020, as western societies opened to provide a much-needed boost to the region's export trade.

This helped to limit the decline in total throughput numbers for the 25 Asian ports outside China featured in our rankings for 2020 to 2.3%.

Countries that failed to get a grip of the virus saw port volumes hit hard.

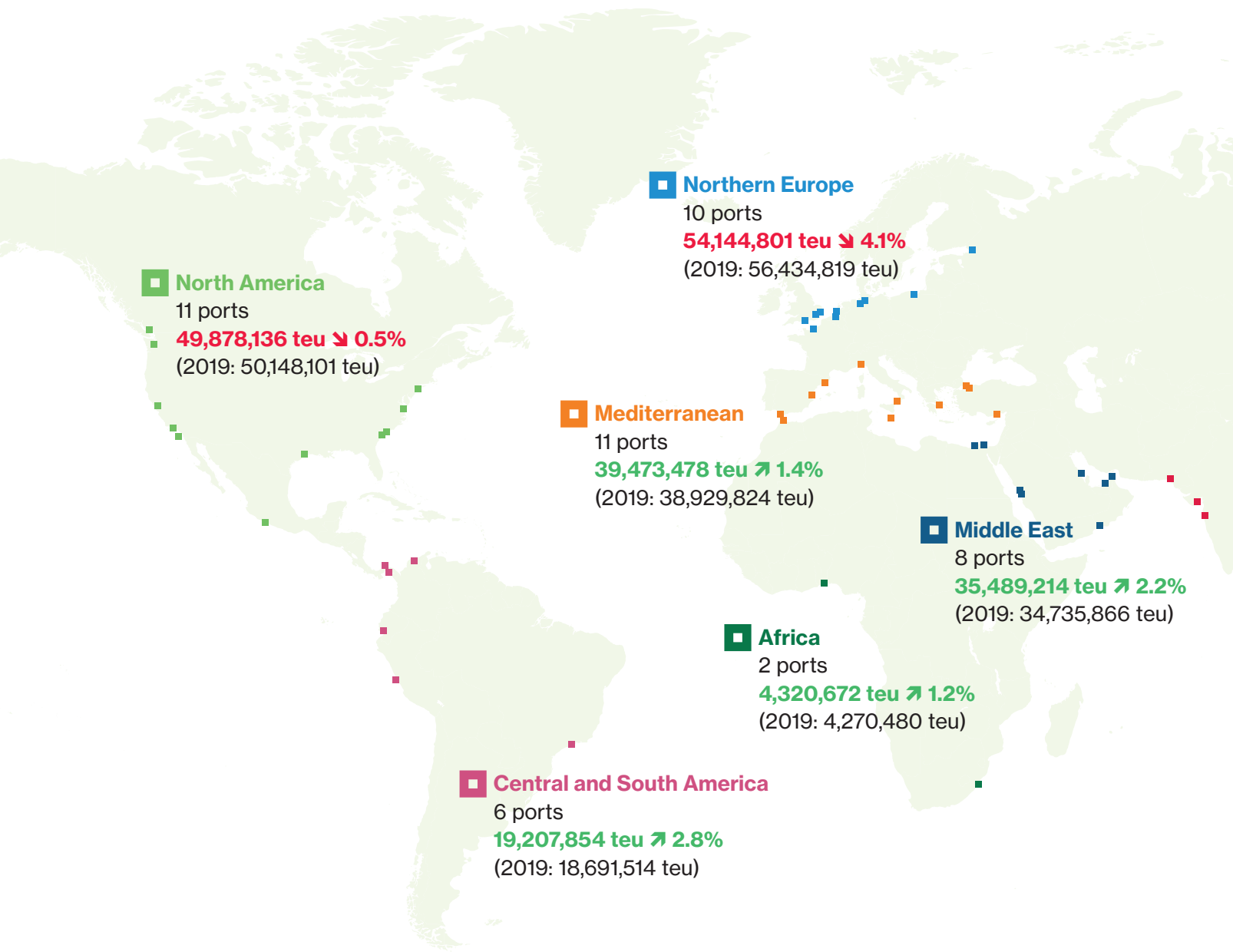
Behind the numbers

Breaking down the key stats and figures from the rankings data

Regional share of top 100 volumes (teu)



Regional breakdown – Volume trajectory





**632.2m
teu**

Volumes
handled by the
top 100 ranked
ports in 2020



0.7%

Drop in
volumes year
on year



**4 new
entries**

into the
top 100



26.6%

Volume growth
in Gioia
Tauro was
the highest
of all ports



-41.7%

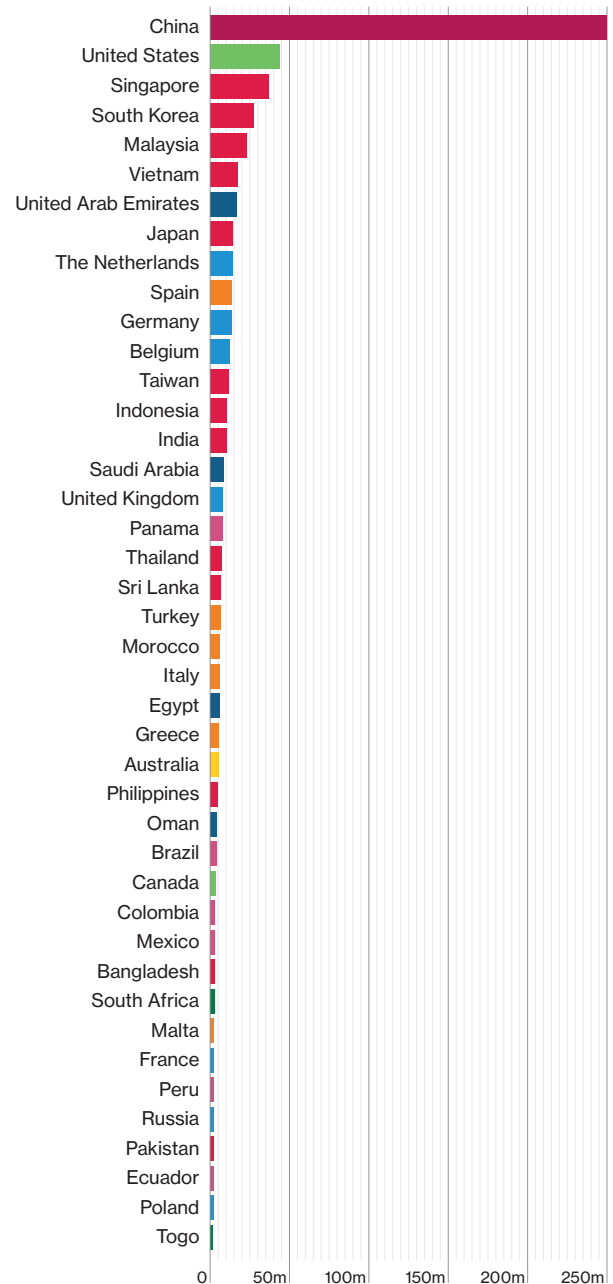
Dalian's drop
in throughput
was the
sharpest
decline



25

Chinese port
entries

Teu by country

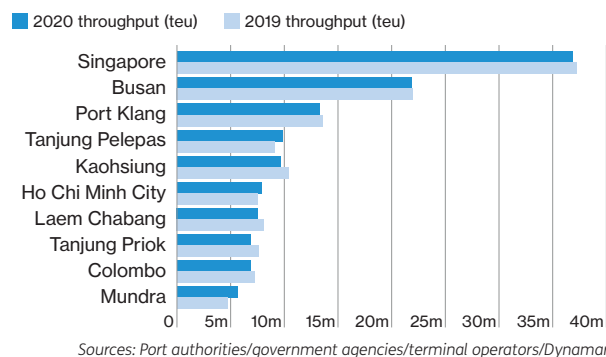


China
25 ports
249,546,700 teu \uparrow 0.1%
(2019: 249,237,100 teu)

Asia (excluding China)
25 ports
174,775,174 teu \downarrow 2.3%
(2019: 178,810,085 teu)

Oceania
2 ports
5,391,021 teu \uparrow 0.4%
(2019: 5,368,749 teu)

Asia's top 10 ports in 2020 (excluding China)



Manila in the Philippines and the Indonesian ports of Tanjung Priok and Tanjung Perak all saw volumes suffer as a result.

On the flipside, the leading Asian ports outside of China, the transshipment giants Singapore and Busan, saw only minor discrepancies in volume totals year on year by containing the spread of the virus.

Vietnam, meanwhile, was one of the few economies that managed to achieve economic growth in 2020 off the back of its prompt and highly successful public health response.

This enabled the southeast nation to reopen its economy and stage a strong recovery, aiding port volumes in the process and keeping it firmly on the path as a rising exporting hub for western markets.

All three of Vietnam's major ports reported growth in 2020, including an almost 18% jump in throughput at Cai Mep.

Middle East

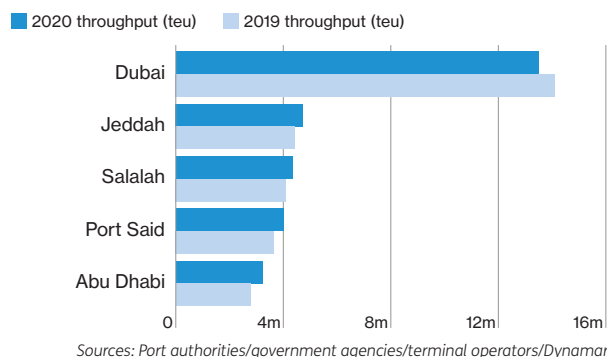
Port facilities in the Middle East featuring in the top 100 count were second only to Central and South America in terms of overall volume growth in 2020.

Accumulated throughput at these eight ports was up 2.2% in the region year on year, as strong transshipment numbers helped to offset weaknesses in localised trade volumes, with the economy heavily impacted by the low oil price.

The rapid response to the first wave of coronavirus and strict containment measures from governments in the region also ensured little disruption at ports when restrictions were gradually lifted from June.

Dubai remains by far and away the Middle East's largest container port but saw traffic fall once again in 2020 by a further 4.4%. The port lost its top 10 status

Middle East top five in 2020



last year and is in danger of falling further down the rankings, with Malaysia's Port Klang snapping at its heels.

Although the health crisis had a role to play, Jebel Ali, as it is also known, has seen growing competition for boxes in the region — not least from compatriot Abu Dhabi, which has continued to go from strength to strength with the addition of container shipping heavyweights Cosco Shipping and Mediterranean Shipping Co as terminal tenants.

Abu Dhabi was one of the few ports to achieve double-digit volume growth in 2020, rising nearly 16% to 3.2m teu. As such, the UAE port has almost doubled its total teu traffic in the space of two years. This also helped propel Abu Dhabi some 15 places in the rankings to 56th position.

Jeddah, too, climbed the rankings off the back of a 6.8% volume increase, having gained a string of new liner services, while Port Said and Salalah also noted strong performances in 2020, with significant throughput gains.

There was also a return to the top 100 for the Egyptian port of Alexandria.

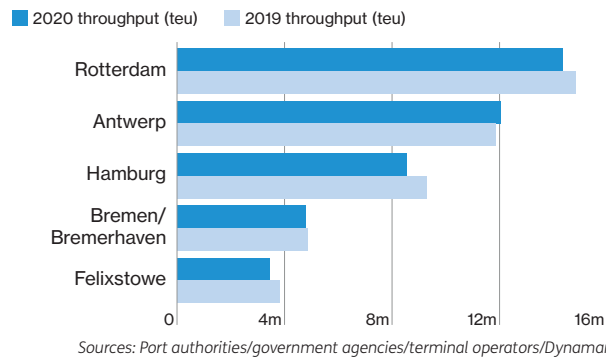
Northern Europe

Last year was tough on Northern Europe's major ports, as the pandemic hit key economies hard, particularly in the first six months of 2020.

Volume growth at the ports included in our rankings dropped back 4.1% on 2019 levels, as all but one of the 10 registered facilities reported a decline in traffic.

Antwerp was the sole growth contributor — but even here, volume increases were minimal, at 1.4%. However, this was still some achievement, considering initial expectations earlier in the year, during the height of lockdowns, were for a 15% drop.

Northern Europe top five in 2020



As a result, the Belgian port made further ground on Rotterdam in terms of total volumes, yet its Dutch neighbour is still the region's top dog and maintained its overall top 10 ranking.

Elsewhere, Germany's two major ports, Hamburg and Bremen/Bremerhaven, were also unable to offset the cargo losses sustained during the first six months of 2020, reporting falls in teu numbers of 7.9% and 1.9%, respectively.

The UK ports of Southampton and Felixstowe also suffered a marked decline in yearly volumes.

For the former, which saw throughput numbers fall back 6%, it meant a substantial drop down the rankings and puts it in danger of losing its top 100 status altogether, unless 2021 brings a significant turnaround in fortunes.

Felixstowe was among the worst hit by carriers' blanked sailings during the second quarter of 2020, as services were scaled back to address the volume shortfall.

While the port saw volumes improve considerably in the third quarter, Felixstowe was the first to feel the pain of congestion in the UK, which held back its recovery.

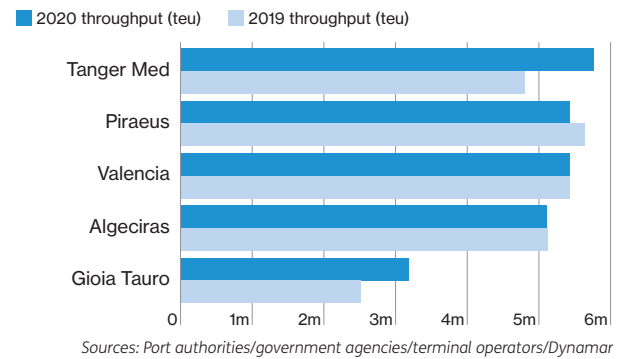
The biggest fall in traffic in the region was reported by the French port of Le Havre — another victim of the pandemic downturn — where box numbers slumped by more than 14%.

Mediterranean

The performances of ports dotted along the Mediterranean coastline also felt the impact of lockdowns across Europe.

Yet the region's resilience in the second half of 2020 ensured it remained on the growth trail for the full year, with Mediterranean facilities clocking up a combined 1.4% increase on 2019.

Mediterranean top five in 2020



However, there were two standout performers in the region.

Firstly, there was Moroccan transshipment hub, Tanger Med. Despite being an empty, isolated beach less than two decades ago, another year of phenomenal volume growth — to the tune of 20.2% — has seen it overtake Piraeus to become the largest port in the Mediterranean.

Meanwhile, a revitalised Gioia Tauro surged 21 places in the rankings, following a staggering 26.6% rise in traffic, as volumes continue to pour through the Italian transshipment hub following MSC's takeover of its Medcenter Container Terminal.

The volume hike was made all the more remarkable considering Italy was the first European country — and the hardest hit — by the initial wave of Covid-19 infections.

Tanger Med's incredible 12 months meant the status of Piraeus as the Mediterranean's largest port was short-lived, having overtaken Valencia in 2019's count.

The Greek port saw volumes fall back 3.7% to 5.4m teu — but it did manage to hold onto to second spot in the Mediterranean, at the expense of its Spanish rival, despite a considerable rebound in traffic seen by Valencia in the second half of 2020.

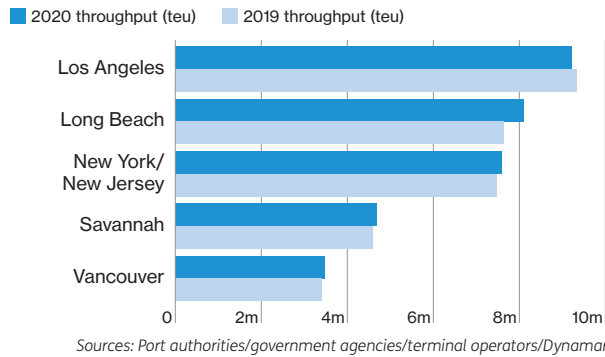
Algeciras also reported only a slight dip in liftings for 2020, though it was a year to forget for Maltese hub Marsaxlokk, which continued to suffer from increasing competition for transshipment traffic in the region, in addition to Covid headwinds.

North America

North American ports bore a significant downturn in the market at the hands of the pandemic.

Lower factory production in Asia and the devastating effect of lockdowns during the first six months of the year caused volumes to plummet in the first half of 2020.

North America top five in 2020



This meant the region's ports were playing catch-up throughout the second half of the year. Yet as one US port executive proclaimed, the recovery went "from doom and gloom to fast and furious on the turn of a dime".

The US government committed to a multi-trillion-dollar package to support the US economy following the pandemic, corresponding with stimulus cheques paid to consumers and cash delivered to households that led to an unprecedented buying spree.

The extent of the turnaround in trade fortunes, particularly in the third quarter, caught everyone by surprise, as imports from the Far East into the US rocketed.

Retailers rushed to replenish starved inventories, squeezing container shipping capacity to its limit, resulting in major disruption at ports up and down the US seaboard.

While port congestion remained an ongoing issue in the second half of 2020, the surge in trade was a welcome development for the North American terminals and helped counterbalance, to a large degree, the cargo shortfall experienced earlier in the year.

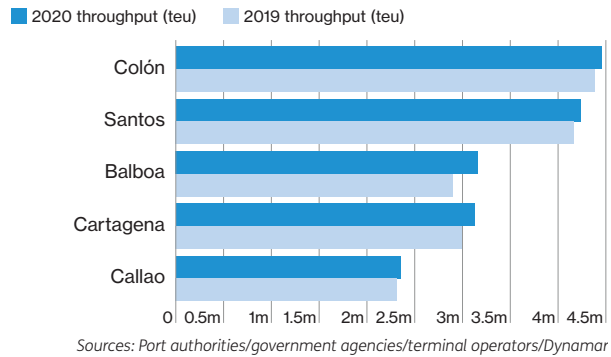
Indeed, some ports managed to come out the other side of 2020 relative unscathed. Long Beach, for one, reported record volumes, as cargo leaped 6.3% year on year.

New York/New Jersey and Savannah also reported a rise in throughput in 2020.

Meanwhile, Los Angeles managed to limit its slide in volumes to just 1.3%, also retaining its crown as North America's largest port.

Despite a fruitful close to the year, Charleston, Virginia and Oakland were among the ports unable to close the first-half deficit, witnessing throughput falls of 5.2%, 4.2% and 1.6%, respectively.

Central & South America top five ports in 2020



The Northwest Seaport Alliance, combining volumes from both Seattle and Tacoma, came late to the recovery party, with the pandemic-led downturn lasting through to as late as November, which led to a 12% volume slide and the unwanted title of North America's worst performer in 2020.

Central and South America

Panamanian port Colón was once again the largest box facility in Central and South America last year, in what proved to be a profitable year for the wider region, even amid the obvious downside of a global recession.

Indeed, Central and South American ports combined achieved the largest growth figure of all regions, climbing 2.9%, with the Covid trade shock far less intense than initially forecast.

Like Colón, where teu totals grew 1.7%, fellow countryman Balboa also benefitted from the boom in US imports from the Far East, resulting in a healthy 9.2% year-on-year volume gain.

While the surge in traffic to the US boosted transshipment numbers considerably in the second half of 2020, the Panamanian ports also acted as storage facilities for containers to alleviate port congestion as post-lockdown volumes surged across the world.

Balboa's success in 2020 was not enough, however, to surpass volumes in Santos, which showed equal resilience through the pandemic, reporting a 1.6% jump in traffic to hold onto its number two spot in the regional rankings.

However, Balboa's throughput rise was sufficient to overtake Colombia's Cartagena, which dropped back to fourth place in the Central and South America region, even though its own throughput climbed more than 4% after a productive 12 months for the port's reefer segment of cargoes.


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Logjams: containerships at anchor in San Pedro Bay, waiting to unload at Los Angeles or Long Beach.

Duncan Selby/Alamy Stock Photo

Carriers survive and thrive as supply chain grinds to a halt

While container ports have struggled with the constraints of the pandemic, their carrier customers have had an entirely different experience

THE Covid-19 pandemic defined 2020 for both ports and terminals, as well as their container line customers.

Yet while 2020 will go down in history as difficult for everyone, arguably carriers have been having a very good crisis — particularly in comparison to the terminals that provide their inland interface.

That was not always guaranteed, however. At the beginning of 2020, when Chinese factories were slow to reopen after an extended Chinese New Year closure, there were fears that supply issues would lead to a weak quarter for lines that had only just come out of a mediocre 2019.

However, as what was initially thought to be a little local trouble in Asia began to spread around the world, even worse scenarios started to emerge.

By the beginning of the second quarter, it was apparent that the impact of lockdowns in the major consumption markets of Europe and the US threatened massive economic disruption.

Casting back for similar events, comparisons were made to the global financial crisis of 2008-2009. By extrapolating what happened to box carriers following that downturn, some analysts warned of the risk of a collective \$20bn loss for container lines.

The black swan of the pandemic was followed by a bevy of black cygnets that threw most — if not all — forecasts into disarray.

No-one foresaw that by the third quarter, demand for containerised freight would be on the rise again. And no-one could have predicted that container lines would

have their most successful financial year on record.

That this should happen in the middle of a pandemic that left most major economies limping and global GDP decreasing by 3.5% says much about the changed nature of container shipping since the last major crisis.

During the second quarter of 2020, when it became apparent that volumes were falling off a cliff, carriers were quick to take capacity out of the market.

There was no point sailing ships empty, and previous experience warned of the dangers of offering cut-throat rates to secure volumes.

Reducing capacity had become easier for carriers, thanks to their congregation into three major alliances.

If a carrier operating on its own had three services on a particular trade lane and wanted to cut capacity, it could pull out one-third, two-thirds, or all of its capacity.

If the fall in demand was 15%, another 15% was left on the table for rivals.

A carrier in an alliance with a combined 10 services had a much finer knife with which to cut. Capacity could be removed from the market in 10% slices, making it easier to reach an equilibrium with demand.

Yet these voluntary reductions in capacity were not in place for long, largely due to another surprise to emerge from the pandemic.

With lockdowns in place, virtually everyone was confined to their homes to some degree. For those who could work from home — which turned out to be far more than ever considered possible — dining rooms doubled as workspaces.

The Port of Choice

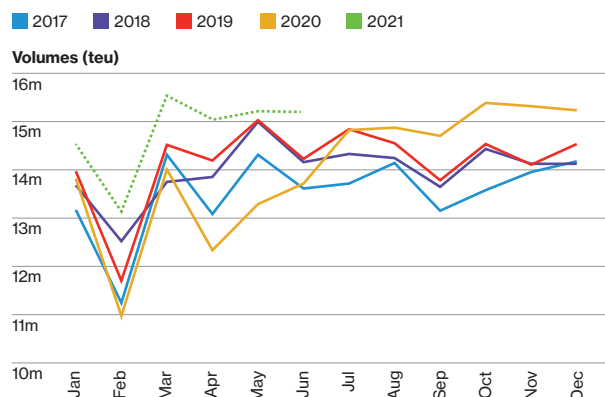
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Port of
LONG BEACH
THE PORT OF CHOICE

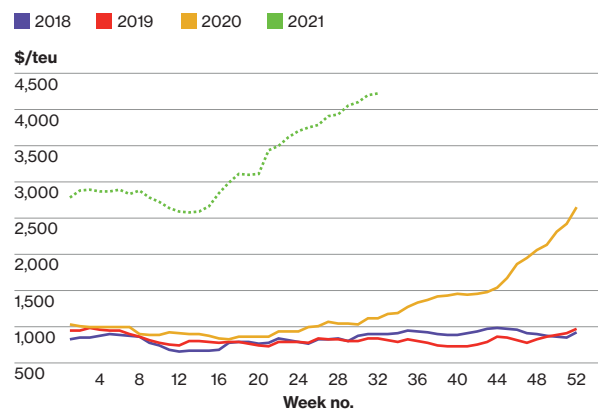


Container trade volumes (2017-2021)



Source: Container Trades Statistics

Shanghai Containerised Freight Index – Global Comprehensive Index (2018-Aug 2021)



Rates are based on an origin port of Shanghai

Source: Shanghai Shipping Exchange

Imprisoned in their homes, consumers who could no longer spend on services such as holidays, eating out or entertainment, started renovating their prison cells.

This demand for containerised goods was boosted further by government economic support packages, which in some cases saw cheques going straight to retailers, then on through the supply chain, with the container lines taking their skim for the ocean carriage.

By year-end, carriers had shifted only 2.2% fewer containers during 2020 than they had during 2019.

The problem was that most of this volume had been moved during the second half of the year — and a larger part of it than before was going to the US.

Towards the end of the year, ports — where the nature of the job precludes working from home — were struggling to service the unexpected surge in volumes at a time when they were having to implement rigorous social distancing and cleaning regimes to protect their workers, and were also losing workers affected by the pandemic.

Moreover, similar situations in rail, trucking, warehousing and distribution were further snarling up the usually free flow of containers through the system, meaning boxes were not clearing the ports fast enough.

As those who could tucked into their Christmas dinners at the end of December, there were close to 40 containerships at anchor in San Pedro Bay, waiting to unload at Los Angeles or Long Beach alone.

That slowdown in the movement of containers led to a shortage of boxes. The period of time when a container was in use increased by four or five days.

For a large carrier, one additional day in the average time containers are used can mean a shortfall of 35,000 containers. So, while there was no actual shortage of containers, there was a container shortage.

The slowdowns at ports also meant a return to blank sailings. A ship stuck in Long Beach for a week would be late back to Asia and, rather than run with ever-later ships, it made more sense to just blank the next sailing.

Again, there was no shortage of ships; every available vessel that could be begged, borrowed or chartered was

deployed — at increasingly great expense, much to the delight of tonnage providers.

The logjams were not a matter of container equipment or vessel capacity; nor were they really a matter of port capacity. They were the result of a sudden, unexpected and unforecastable surge of volumes into the US. Globally, volume growth from April 2019-April 2021 was a mere 2%.

However, the shortage of containers, along with bottlenecks in terminals and inland operations, has now spread all around the world, showing quite how interdependent the supply chain is.

Demand now far exceeds the constrained supply. And any market trader will know that when demand is greater than supply, prices rise — which is exactly what happened to container freight rates.

In late August 2020, the Shanghai Containerised Freight Index was reporting Asia-Northern Europe rates of less than \$1,000 per teu. By year-end, that figure had hit \$4,000 per teu. It is now more than \$6,000 per teu.

The disruption at ports and congestion in the supply chain has been hugely profitable for container lines. Yet many would be prepared to give up a few dollars of profit for a return to some semblance of normalcy. Carriers, too, would like to see their products being available and reliable.

Rates, inevitably, will come back down, but it may be some time before they do. Shippers will have to adapt to a new reality where container lines are able to maintain rates at levels that are profitable, which was not the case for most years in the decade leading up to the pandemic.

How long it will take to get the backlog of demand through the system remains to be seen. It is unlikely to be before next year's Chinese New Year Holiday, which will mark a two-year anniversary of the pandemic starting to have an impact on container shipping.

Ports will have a role to play in that recovery to the new normal. Success in achieving that will have a role to play in how well those ports perform in the future.

Pandemic pain: the impact of the coronavirus outbreak was felt at ports the world over.

Robert Kneschke /
Alamy Stock Photo



One Hundred Ports: Pandemic pain lingers

Box ports look set to post strong volume growth in 2021, gaining back traffic from last year's coronavirus-induced shortfall. Yet a new strain of the virus could quickly turn fortunes, while supply chain disruption continues to plague ports

GLOBAL container port throughput is on track to rebound handsomely in 2021, nullifying the steep volume losses endured during last year's pandemic-led recession.

Analysts Drewry expect an uplift in total global volumes of around 10% — a figure that, if proved correct, will not only negate the coronavirus-induced demand deficit but maintain the moderate growth trend in the years preceding the virus outbreak.

So, as you were? Well, not quite. If the past 18 months have taught us anything, it is that nothing can be regarded as certain in this Covid-clouded world.

While the initial shock of the pandemic has subsided, coronavirus has not gone away. Further, if a new variant develops and the world proceeds back into lockdown, port traffic will inevitably suffer, and volume growth forecasts will be downgraded accordingly.

However, the primary risk from coronavirus is supply chain disruption — or more of it.

The claw-back of traffic lost at the height of the pandemic began in earnest in the second half of 2020, as economies were lifted out of lockdown, prompting an unprecedented surge in demand for containerised goods.

Much of this was centred in the US, where consumer spending went into overdrive off the back of pandemic-induced stimulus packages.

The sheer level of demand pushed the container supply chain to its limit. Carriers were unable to address an equipment shortage, ports became clogged and terminal inefficiencies were laid bare. Coronavirus-related restrictions on staffing, meanwhile, did little to ease the logistical logjam that had unfurled globally. And the congestion chaos is still far from being resolved nearly 12 months on.

Fundamentally, the container industry has not been offered any breathing space amid a prolonged period of sustained demand. This has provided little opportunity to introduce slack or resilience into the supply chain system and iron out the choke points.

Meanwhile, in 2021, issues that in the past would prompt only minor disruption have escalated dramatically, thwarting any chance of getting a grip on an already dire situation.

Of course, the grounding of the 20,000 teu *Ever Given* in the Suez Canal back in March would have caused disruption at the best of times, but the cargo backlogs that ensued were intensified by the industry's existing congestion problems.

More recently saw the closure of the Chinese hub of Yantian — part of the Shenzhen port complex — following a coronavirus outbreak, leading to widespread disruption as the shutdown rippled across the supply chain.

Similarly, in Vietnam, where outbreaks of the virus prevented ships from calling at several of its terminals, the impact was heightened by a lack of supply chain elasticity.

Drewry senior analyst Eleanor Hadland explained that because congestion is “demand-side” led, there have been fewer workarounds in the system that ordinarily would exist.

In the past, she said, congestion incidents have tended to have been isolated geographically, and have arisen from so-called “supply-side” congestion, whether a ship colliding with cranes, a flood, strike action or “something like the Suez Canal blockage”.

“We’ve been through US west coast closures; we’ve been through earthquakes; we’ve been through all kinds of things. There’s always been enough resilience

Top 10 ports: 2021 half-year volumes

Ranking	Port	Country	Region	1H 2021 (teu)	1H 2020 (teu)	% increase/decrease
1	Shanghai	China	Asia	22,940,000	20,060,000	↗ 14.4%
2	Singapore	Singapore	Asia	18,730,000	17,837,000	↗ 5.0%
3	Ningbo-Zhoushan	China	Asia	16,070,000	13,250,000	↗ 21.3%
4	Shenzhen	China	Asia	13,760,000	11,070,000	↗ 24.3%
5	Guangzhou	China	Asia	11,770,000	10,760,000	↗ 9.4%
6	Qingdao	China	Asia	11,660,000	10,340,000	↗ 12.8%
7	Busan*	South Korea	Asia	10,740,000	10,746,000	↘ 0.1%
8	Tianjin	China	Asia	10,300,000	8,580,000	↗ 20.0%
9	Hong Kong	China	Asia	8,725,000	8,647,000	↗ 0.9%
10	Rotterdam	The Netherlands	Northern Europe	7,612,000	7,002,800	↗ 8.7%
Total				132,307,000	118,292,800	↗ 11.8%

Source: Dynamar *Estimated based on Q1 2021 figures

or spare capacity in the system to cope. But those options are few and far between as demand has suddenly risen, not just back to pre-pandemic levels, but significantly higher.

“Now, because everything is working at 110%, it doesn't take a big event for everything to fall over. Every port is busy.”

In the short term, at least, Ms Hadland sees little hope that congestion will be alleviated.

Indeed, she said expectations are for port congestion and supply chain disruption to last through to the first quarter of 2022, when the traditional slowdown in cargo in the post-Chinese New Year period should offer the industry some much-needed respite.

Vespucci Maritime chief executive and prominent container shipping commentator Lars Jensen told Lloyd's List that it will not be until after the peak season at the very earliest before things start to improve.

This prognosis, however, comes with a caveat — and a strong one at that — of there being no further disruption that would put the industry and ports even further on the back foot. In the light of recent events, this is certainly no given.

“If you look over the past year and a half, it's been nothing but one string of disruptions after another. If you look at the Yantian debacle, this was caused by a very, very small number of positive cases in south China,” he said.

“What would happen if you had five positive cases, locally transmitted, of the Delta variant in Shanghai tomorrow? And, given how the world looks today, it is not an unrealistic spectrum that it could happen.”

Mr Jensen was speaking shortly before a terminal in China's Ningbo, the world's third-busiest port, halted operations after a single dockworker tested positive for coronavirus, adding yet further strain to an already stretched supply chain.

Box volume growth outpacing terminal development

Global container port capacity is likely to grow too slowly to meet increased volume demand, putting further pressure on supply chains, analysts at Drewry say.

In its latest annual review and forecast for the sector, Drewry said capacity was set to increase by 2.5% a year to reach 1.3bn teu in 2025.

Container volumes, meanwhile, were likely to rise by 5% over the same period.

This would see average utilisation at ports rise from its current level of 67% to more than 75%.

“While 75% utilisation at a port or terminal level is not sufficiently high to be of significant concern, at a global level, this expectation of tightening port capacity in a market plagued by congestion due to supply chain imbalances is a cause for concern,” Drewry said.

Despite a fall in volumes during the pandemic, terminal operators had demonstrated a resilience

to external shocks. And, while capital expenditure had been reined in to reduce costs, this was now improving again, according to the analysts.

“The strength of the recovery in demand, aided by high levels of liquidity in the financial market, have enabled operators to bring forward their investment plans, resulting in a stronger capacity outlook post-pandemic,” said senior analyst Eleanor Hadland.

Additional capacity would likely come from upgrading existing terminals rather than developing new ones and would be assisted by increased digitalisation to increase the speed of throughput.

Platforms such as TradeLens and GSBN would also help streamline processes.

“Improving cargo flow is key,” said Ms Hadland.

“If, via the rollout of blockchain-based technology, terminals can achieve higher volumes over the same asset base, this will drive improved returns on investment.”

At the time of writing, carriers had started to reroute ships to bypass the blocked terminal.

The incident once again illustrated the fragility of the supply chain that has been a feature throughout the pandemic, where even the health of one person has the potential to bring the container shipping system to its knees. But here we are.

Long-term risks

If, indeed, container shipping rides out the remainder of 2021 relatively unscathed with minimal supply chain disruption, it will be the volume contribution of North America, spurred by the weighty US consumer purse, and strong Chinese exports that drive the recovery.

While Europe, the Middle East and south Asia are all expected to experience modest volume rebounds, Drewry projects North American and Chinese port throughput to jump 15% and 12%, respectively, year on year in 2021.

In the case of China, this is even more impressive, considering it was one of the few regions not to witness a drop in 2020 traffic, going far beyond solely coronavirus catch-up trade.

During the first six months of 2021, out of the six mainland Chinese ports ranked among the top 10 facilities globally, only Guangzhou failed to achieve

double-digit volume growth — but only just. Even here, teu totals rocketed 9.4% in the January-June period.

For their longer-term forecast, the London-based analysts expect the container port sector to record a compound annual growth from 2020 through to 2025 of around 5%. This would stay true to the modest growth trend projected before the coronavirus outbreak.

Looking further ahead, however, is there perhaps unavoidable economic pain on the horizon stemming from the pandemic, which will inevitably weigh on volume demand?

“There are quite strong inflationary pressures — of which freight and logistics costs are actually one — which are pushing up the cost of a large number of goods in the developed world in particular,” said Ms Hedland.

“Inflation rates are at an all-time low. And governments have printed a lot of money to pay for furlough and US consumer pay bonus cheques and other types of economic support. All of this is adding to the inflationary pressure.”

Sooner or later, she says, the taxpayer is going to have to pay for the government largesse during the Covid crisis.

“Somebody needs to pay for it — and it’s going to be one hell of a hangover!”

Pandemic-driven earnings slump merely a blip for profitable ports

Having spent much of the past decade making little or no money, box carriers bounced back with a vengeance in 2020 to record their best financial performance to date.

Despite a shaky start, the pandemic proved to have driven consumer spending on containerised goods to dizzying heights in the second half of the year, leading to soaring revenues.

Meanwhile, port and terminal operators could only look on in envy as earnings dropped dramatically.

While they too benefitted from the volume rebound in the latter half of last year, widespread port congestion put paid to anything like the recovery experienced by their box brethren.

The fundamental difference is the varying contractual structures that exist in the respective businesses, explained Drewry’s Ms Hadland.

Congestion incurs costs to both the carriers and port operators, but the lines have several pricing mechanisms to compensate.

“Ports don’t have that flexibility on price that the carriers have. They are generally a heavily annual contracted business, and don’t have a proportion of their business in the spot market like the carriers,” she said.

“And if the carrier is provided with more volumes, it actually gets cheaper, rather than more expensive.”

This mismatch in the supply chain is also seen in how liner operators can introduce congestion surcharges to shippers due to delays and disruption, as witnessed throughout the global logjam. Unfortunately for the ports, this isn’t in their armoury.

With volumes rebounding further in 2021, port operators can expect higher revenues than last year, but, unlike the carriers, they will not be able to translate higher volumes into higher prices immediately.

“There’s probably going to be somewhat of a lag before they can start achieving price increases. Although they’ll be reaping gains, they just won’t get to the very highs,” added Ms Hadland.

Nevertheless, she said this must be put into context by the fact that while carriers have been losing money for the past decade, port and terminal operators have been turning a tidy buck.

“If you want to take the highest highs, you’ve also got to be willing to take the lowest lows,” she said.

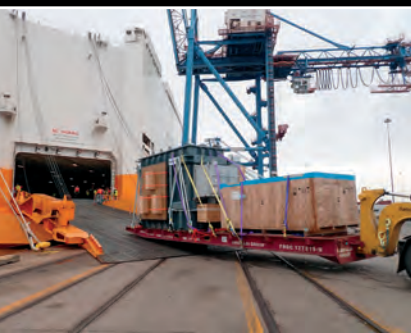
“It’s generally a profitable business that generates good stable cash returns for investors, which is why pension funds and the like invest into the business because of its long-term stable cashflow opportunity.”



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The Top 100 ports by throughput in 2020

Ranking	Port	Country	Region	2020 annual throughput (teu)	2019 annual throughput (teu)*	Annual % change
1	Shanghai	China	Asia	43,503,400	43,303,000	↑ 0.5%
2	Singapore	Singapore	Asia	36,870,900	37,195,636	↓ 0.9%
3	Ningbo-Zhoushan	China	Asia	28,720,000	27,530,000	↑ 4.3%
4	Shenzhen	China	Asia	26,550,000	25,770,000	↑ 3.0%
5	Guangzhou	China	Asia	23,505,300	23,236,200	↑ 1.2%
6	Qingdao	China	Asia	22,010,000	21,010,000	↑ 4.8%
7	Busan	South Korea	Asia	21,824,000	21,992,001	↓ 0.8%
8	Tianjin	China	Asia	18,353,100	17,264,000	↑ 6.3%
9	Hong Kong	China	Asia	17,953,000	18,361,000	↓ 2.2%
10	Rotterdam	The Netherlands	Northern Europe	14,349,446	14,810,804	↓ 3.1%
11	Dubai	United Arab Emirates	Middle East	13,488,000	14,111,000	↓ 4.4%
12	Port Klang	Malaysia	Asia	13,244,423	13,580,839	↓ 2.5%
13	Antwerp	Belgium	Northern Europe	12,031,469	11,860,204	↑ 1.4%
14	Xiamen	China	Asia	11,410,000	11,122,200	↑ 2.6%
15	Tanjung Pelepas	Malaysia	Asia	9,800,000	9,100,000	↑ 7.7%
16	Kaohsiung	Taiwan	Asia	9,621,662	10,428,634	↓ 7.7%
17	Los Angeles	United States	North America	9,213,400	9,337,632	↓ 1.3%
18	Hamburg	Germany	Northern Europe	8,540,000	9,274,215	↓ 7.9%
19	Long Beach	United States	North America	8,113,300	7,632,032	↑ 6.3%
20	Ho Chi Minh City	Vietnam	Asia	7,854,091	7,531,054	↑ 4.3%
21	New York/New Jersey	United States	North America	7,585,819	7,471,131	↑ 1.5%
22	Laem Chabang	Thailand	Asia	7,546,500	8,106,928	↓ 6.9%
23	Tanjung Priok	Indonesia	Asia	6,870,400	7,600,000	↓ 9.6%
24	Colombo	Sri Lanka	Asia	6,854,762	7,228,337	↓ 5.2%
25	Tanger Med	Morocco	Mediterranean	5,771,200	4,801,713	↑ 20.2%
26	Mundra	India	Asia	5,656,594	4,732,699	↑ 19.5%
27	Yingkou	China	Asia	5,650,000	5,480,000	↑ 3.1%
28	Piraeus	Greece	Mediterranean	5,437,477	5,648,056	↓ 3.7%
29	Valencia	Spain	Mediterranean	5,428,307	5,439,827	↓ 0.2%
30	Taichang	China	Asia	5,212,000	5,152,000	↑ 1.2%
31	Hai Phong	Vietnam	Asia	5,142,300	5,133,150	↑ 0.2%
32	Dalian	China	Asia	5,110,000	8,760,000	↓ 41.7%
33	Algeciras	Spain	Mediterranean	5,107,873	5,125,385	↓ 0.3%
34	Rizhao	China	Asia	4,860,000	4,500,000	↑ 8.0%
35	Lianyungang	China	Asia	4,800,000	4,780,000	↑ 0.4%
36	Bremen/Bremerhaven	Germany	Northern Europe	4,767,000	4,856,900	↓ 1.9%
37	Jeddah	Saudi Arabia	Middle East	4,737,313	4,433,991	↑ 6.8%
38	Savannah	United States	North America	4,682,249	4,599,177	↑ 1.8%
39	Jawaharlal Nehru	India	Asia	4,470,000	5,100,891	↓ 12.4%
40	Colón	Panama	Central & South America	4,454,902	4,379,477	↑ 1.7%
41	Manila	Philippines	Asia	4,442,921	5,315,558	↓ 16.4%
42	Cai Mep	Vietnam	Asia	4,411,799	3,742,384	↑ 17.9%
43	Salalah	Oman	Middle East	4,340,000	4,109,000	↑ 5.6%
44	Tokyo	Japan	Asia	4,261,793	4,510,000	↓ 5.5%
45	Santos	Brazil	Central & South America	4,232,046	4,165,248	↑ 1.6%
46	Port Said	Egypt	Middle East	4,009,672	3,658,159	↑ 9.6%
47	Qin Zhou	China	Asia	3,950,000	4,000,000	↓ 1.3%
48	Tanjung Perak	Indonesia	Asia	3,600,000**	3,900,000**	↓ 7.7%
49	Fuzhou	China	Asia	3,520,000	3,540,000	↓ 0.6%
50	Vancouver	Canada	North America	3,467,521	3,398,860	↑ 2.0%

*2019 volumes include revised figures in government and port authority statistics **estimated figure

Ranking	Port	Country	Region	2020 annual throughput (teu)	2019 annual throughput (teu)*	Annual % change	
51	1	Felixstowe	United Kingdom	Northern Europe	3,435,000**	3,800,000**	9.6%
52	3	Dongguan	China	Asia	3,420,000	3,680,000	7.1%
53	6	Seattle/Tacoma	United States	North America	3,320,379	3,775,303	12.0%
54	2	Yantai	China	Asia	3,300,200	3,102,400	6.4%
55	2	Incheon	South Korea	Asia	3,272,213	3,091,955	5.8%
56	15	Abu Dhabi	United Arab Emirates	Middle East	3,220,000	2,780,000	15.8%
57	21	Gioia Tauro	Italy	Mediterranean	3,193,000	2,523,000	26.6%
58	8	Balboa	Panama	Central & South America	3,161,900	2,894,654	9.2%
59	1	Cartagena	Colombia	Central & South America	3,127,579	2,995,031	4.4%
60	4	Tangshan	China	Asia	3,120,000	2,944,000	6.0%
61	7	Nanjing	China	Asia	3,020,000	3,310,000	8.8%
62	1	Houston	United States	North America	3,001,164	2,990,175	0.4%
63	1	Melbourne	Australia	Oceania	2,995,248	2,967,315	0.9%
64	11	Barcelona	Spain	Mediterranean	2,958,040	3,324,650	11.0%
65	6	Manzanillo	Mexico	North America	2,909,632	3,069,183	5.2%
66	11	Ambarli	Turkey	Mediterranean	2,887,800	3,104,882	7.0%
67	9	Chittagong	Bangladesh	Asia	2,839,977	3,088,187	8.0%
68	3	Virginia	United States	North America	2,813,415	2,937,962	4.2%
69	1	London	United Kingdom	Northern Europe	2,772,000	2,790,000	0.6%
70	9	Yokohama	Japan	Asia	2,661,622	2,990,000	11.0%
71	4	Kobe	Japan	Asia	2,647,066	2,871,642	7.8%
72	1	Durban	South Africa	Africa	2,595,402	2,769,869	6.3%
73	1	Genoa	Italy	Mediterranean	2,498,850	2,669,917	6.4%
74	6	Nagoya	Japan	Asia	2,471,146	2,844,004	13.1%
75	4	Oakland	United States	North America	2,461,262	2,500,461	1.6%
76	3	Marsaxlokk	Malta	Mediterranean	2,441,589	2,722,889	10.3%
77	8	Le Havre	France	Northern Europe	2,417,000	2,822,910	14.4%
78	2	Sydney	Australia	Oceania	2,395,773	2,401,434	0.2%
79	1	Osaka	Japan	Asia	2,352,250	2,456,028	4.2%
80	1	Charleston	United States	North America	2,309,995	2,436,185	5.2%
81	6	Quanzhou	China	Asia	2,260,000	2,580,000	12.4%
82	1	Callao	Peru	Central & South America	2,250,827	2,313,907	2.7%
83	1	Yeosu Gwangyang	South Korea	Asia	2,158,755	2,378,337	9.2%
84	3	King Abdullah	Saudi Arabia	Middle East	2,153,963	2,020,683	6.6%
85	1	St Petersburg	Russia	Northern Europe	2,099,649	2,221,724	5.5%
86	1	Karachi	Pakistan	Asia	2,079,000	2,097,855	0.9%
87	11	Guayaquil	Ecuador	Central & South America	1,980,600	1,943,197	1.9%
88	1	Haikou	China	Asia	1,970,000	1,970,000	0.0%
89	2	Jiaxing	China	Asia	1,955,700	1,865,300	4.8%
90	2	Mersin	Turkey	Mediterranean	1,948,700	1,854,312	5.1%
91	5	Gdansk	Poland	Northern Europe	1,924,000	2,073,215	7.2%
92	NEW	Nantong	China	Asia	1,911,000	1,542,000	23.9%
93	1	Dammam	Saudi Arabia	Middle East	1,863,249	1,822,642	2.2%
94	17	Zhuhai	China	Asia	1,840,000	2,556,000	28.0%
95	1	Taichung	Taiwan	Asia	1,821,000	1,793,966	1.5%
96	7	Southampton	United Kingdom	Northern Europe	1,809,237	1,924,847	6.0%
97	1	Izmit	Turkey	Mediterranean	1,800,642	1,715,193	5.0%
98	NEW	Lomé	Togo	Africa	1,725,270	1,500,611	15.0%
99	NEW	Alexandria	Egypt	Middle East	1,677,017	1,800,391	6.9%
100	10	Jinzhou	China	Asia	1,643,000	1,879,000	12.6%

*2019 volumes include revised figures in government and port authority statistics **estimated figure

01 / Shanghai (China)

↗ NO CHANGE

Throughput 2020: **43,503,400 teu**, ↗ 0.5% (2019: 43,303,000 teu)

Yangshan Deepwater Port is set to become the future growth engine, with container volume likely to make up more than half the Chinese port's total

ANOTHER year, another top ranking for Shanghai on the Lloyd's List Top 100 container ports league table.

However, the coronavirus pandemic made last year's road to success a bit bumpier than usual.

The nearly 7% year-on-year decline in the first-half box throughput reduced the port's lead over Singapore, the runner-up, to about 2m teu.

However, a sprightly second half helped it manage to retain the title of the world's busiest box port for the 11th consecutive year.

As a key part of the port of Shanghai, Yangshan Deepwater Port — which mainly handles large oceangoing vessels — has further strengthened its position.

Handling increased by 2.1% to 20.2m teu in 2020, as its share of Shanghai's total ramped up to 46.5% from 45.7% the year before.

Yangshan Phase Four, touted as the world's largest automated container terminal, saw volume jump 27% to 4.2m teu — albeit still short of its 6.3m teu annual designed capacity.

Launched at the end of 2017 and seen as one of Shanghai's proudest port projects, the terminal is now equipped with 2.4 km of quays, seven berths, 21 quay cranes, 108 rail-mounted gantry cranes and 125 automated guided vehicles.

Efforts are being made to further enhance the operations there, including the upgrade of its remote-control systems.

In June, a remote-control centre was established in an office building about 100 km away from the automated terminal, with the application of the fifth-generation fixed networks.

Known as F5G, the new technology has significantly

improved the distance, speed and reliability of connections, enabling the terminal to operate much more efficiently, said the port operator Shanghai International Port Group.

SIPG expects throughput at Yangshan Phase Four to top 5m teu in 2021 and additional equipment to come online by year-end, which will allow the facility to run at full steam.

This partly reflects the company's optimism about this year's market.

The port has clearly benefitted from a continued box shipping boom, thanks to a pandemic-led surge in demand for containerised products.

Container throughput at Shanghai rose 14.5% to 18.9m teu in January-May, on track to break last year's record.

As the largest economic and trading hub in China, Shanghai's port figures often serve as a

Shanghai: the largest economic and trading hub in China.

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barometer for the country's exports and imports, which have also shown a strong performance for the first six months of 2021.

Analysts have forecast the uptrend of Chinese exports will remain through the rest of the year, even though the growth is likely to slow due to the base effect.

"We think the demand increase will lead to a stable increase in SIPG's port throughput as the peak season [of container shipping] arrives in the second half of the year," Chinese investment bank CICC said in a report.

The latest five-year planning released by the Shanghai municipal government has set the target for the city's port to reach 47m teu by 2025, of which 25m will be achieved by Yangshan Deepwater Port.

That means Yangshan will not only become the future growth engine but also bear any extra traffic shifted from other port areas of Shanghai.

This will require further improvement in the port's transport and logistics system, in addition to a favourable macro environment.

Port authority: Shanghai Municipal Transportation Commission, Floor 6-16, Building#1, 300 Shibocun Road, Pudong District, Shanghai, China 200125

Website: jtw.sh.gov.cn

Email: contact@portshanghai.com.cn

Terminals (Operators):

Yidong Container Terminal Branch (SIPG)
Zhendong Terminal (SIPG)
Shanghai Pudong International Container Terminal (SIPG, Hutchison Ports, and Cosco Shipping Ports)
Shanghai East Container Terminal (SIPG and APM Terminals)
Shanghai Mingdong Container Terminal (SIPG, Cosco Shipping Ports and HPH)
Shanghai Shengdong International Container Terminal (SIPG)
Shanghai Guandong International Container Terminal (SIPG)
Shanghai Shangdong Container Terminal (SIPG)

02 / Singapore (Singapore)

NO CHANGE

Throughput 2020: **36,870,900 teu**, ▼ **0.9%** (2019: 37,195,636 teu)

Throughput holds up at the world's busiest transshipment hub, but it faces disruption to vessel schedules on major east-west trades

SINGAPORE retained its crown as the world's busiest transshipment hub last year, helped by a marked recovery in global trade that supported its box traffic amid a year hit by the coronavirus pandemic.

It handled 36.9m teu of containerised cargoes in 2020, a slight drop of 0.9% compared to 2019.

"After a steep decline in early 2020 when Covid-19 first struck, international sea trade

volumes have shown signs of recovery from the second half of last year," senior minister for transport Chee Hong Tat said.

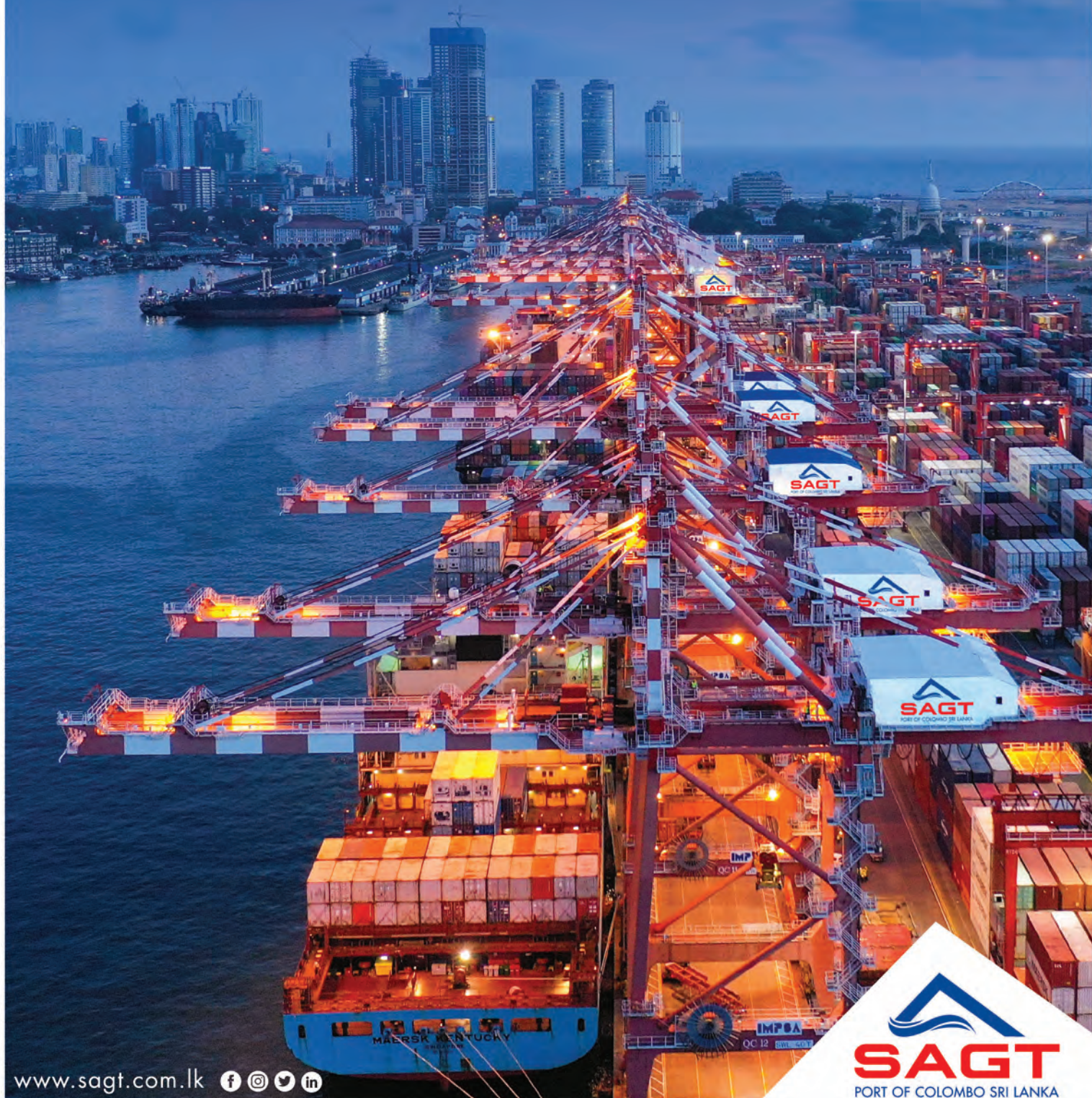
"This has helped Maritime Singapore stay resilient in 2020,





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even though our economy contracted by 5.8%.”

A surge in vessel calls and container volumes in the months that followed, however, has led to congestion at many ports as container rollover ratios climbed, with empty containers seen spending more time waiting for pick-ups in the yards.

Terminal operator PSA Singapore described the situation as “exceptional” and attributed it to a confluence of factors dragging reliability of vessel sailing schedules to 10-year lows.

It has since rolled out several value-added services, including priority discharge for time-sensitive cargoes and offering free access to shipping lines for a limited period to a digital platform, providing almost real-time visibility of key cargo-handling milestones in Singapore.

These services were part of PSA Singapore’s efforts to boost collaboration with shippers and shipping lines, as well as enhance cargo movement visibility to mitigate the disruptions affecting cargo owners and commodities worldwide.

Despite the pandemic-triggered headwinds, PSA Singapore has also pressed on with the Tuas mega port development, which seeks to consolidate port operations at the western-most end of the island state.

The first berths of the mega port — which at full build will have capacity to handle 65m teu annually — are on track to come online by the end of this year.

The Tuas port is expected to boast a fleet of more than 2,000-strong automated guided vehicles when it turns fully operational in the 2040s.

PSA Singapore has already contracted VDL and ST Engineering to each supply 80 such AGVs.

The port operator has piloted the use of these battery-powered AGVs, along with tugs and other prime-movers running on liquefied natural gas and other alternative fuels, at its existing Pasir Panjang terminals.

PSA Marine now owns and operates a pair of LNG dual-fuel harbour tugs, the first of which entered into operation back in August 2019.

PSA Singapore has teamed up with Chiyoda, Mitsubishi and Nanyang Technological University to develop a technology to extract hydrogen that will power fuel cell-driven prime movers.

The partners expect to embark on a demonstration of the hydrogen fuel cell vehicles at the Pasir Panjang terminals in 2023.

PSA Singapore continues to champion efforts in the industry adoption of 5G, with live operational trials at the PSA Living Lab in Pasir Panjang Terminal.

Phase 1 trials were completed and new use case scenarios, along with further validation of the latest technology standards, are planned for Phase 2 trials, which starts this year (2021).

Port authority: Maritime and Port Authority of Singapore, 460 Alexandra Road, PSA Building #19-00, Singapore 119963

Website: www.mpa.gov.sg/web/portal/home

Email: qsm@mpa.gov.sg

Terminals (Operators):

Tanjong Pagar (PSA Singapore)

Keppel (PSA Singapore)

Brani (PSA Singapore)

Pasir Panjang (PSA Singapore)

Jurong (Jurong Port)

03 / Ningbo-Zhoushan (China)

▲ NO CHANGE

Throughput 2020: **28,720,000 teu**, **▲ 4.3%** (2019: 27,530,000 teu)

Port streamlines its customs clearance and offers subsidies to carriers in order to mitigate the problem of container shortages

NINGBO-Zhoushan, situated at China’s eastern economic powerhouse in the Yangtze River Delta region, has shown resilience as a top three container port in the world amid the impact of the coronavirus pandemic.

Despite a 4.7% year-on-year throughput decline in the first half of 2020, it ended the year with a 4.3% growth.

While the results came against the backdrop of a broader recovery in both China’s

manufacturing production and overseas consumption demand, it also reflected the efforts made by the port to overcome the virus-led disruptions.

To mitigate container shortages — one of the biggest headaches in box shipping nowadays — customs in Ningbo started to streamline their clearance procedures in the first half of 2021.

Clearance time for empty import containers has been reduced from

24 hours at the beginning of 2021 to about six hours.

That aside, Ningbo has also offered incentives for carriers hauling back such key equipment from abroad.

A government document released in February showed that carriers would be awarded Yuan200 (\$31) per teu in the first quarter of this year for the return of additional empty boxes, using the previous quarter as the benchmark.



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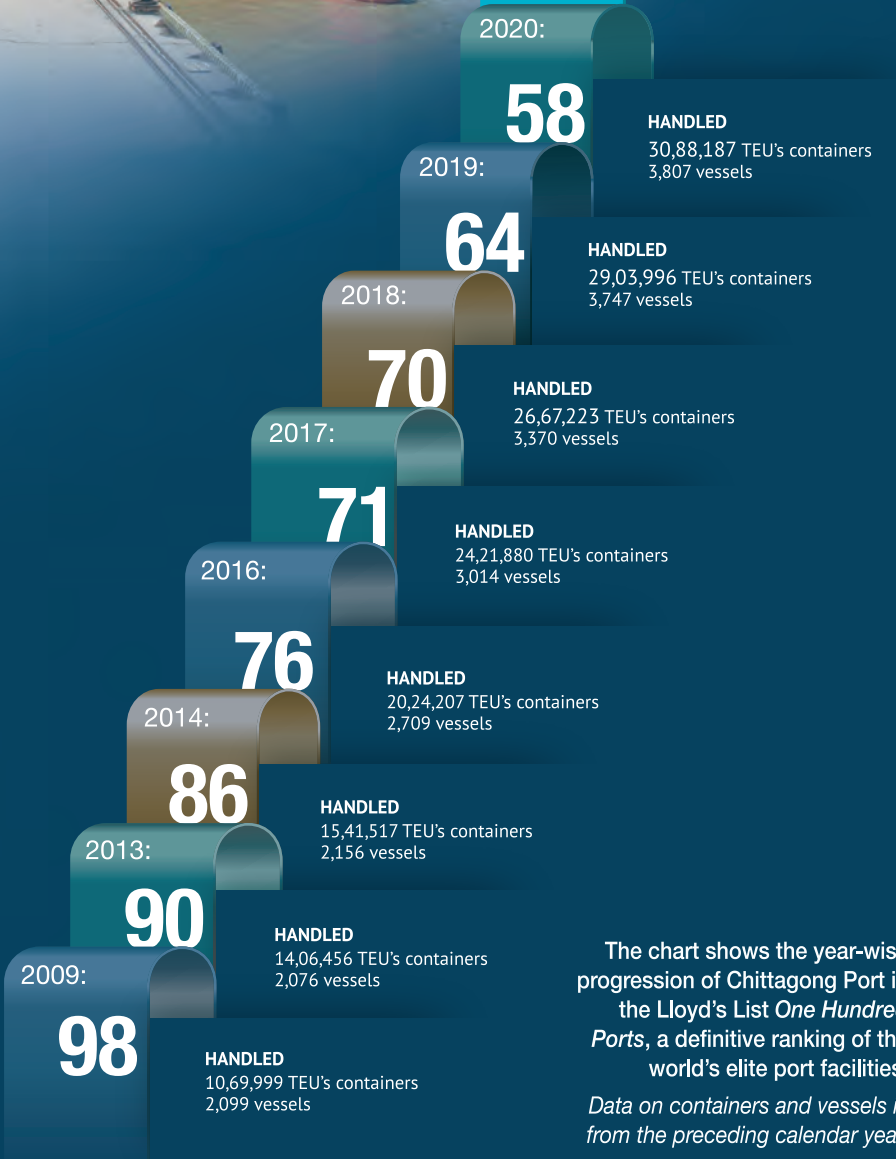
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CHITTAGONG PORT AUTHORITY

Redefining port services

EXIM trade of Bangladesh is now at its apex and Chittagong port has become one of the busiest port in the region.

New infrastructural developments and enhanced service standards have redefined Chittagong port as one of the most important port of South Asia.



The chart shows the year-wise progression of Chittagong Port in the Lloyd's List *One Hundred Ports*, a definitive ranking of the world's elite port facilities. Data on containers and vessels is from the preceding calendar year.





Ningbo-Zhoushan: goal is to top 40m teu in throughput by 2025.
Zhejiang Sea Port Group

Their vessels — which carry more than 500 teu of such containers, accounting for more than 70% of the load on board — could also receive up to Yuan300,000 per trip on east-west main lanes, or Yuan100,000 on other routes.

These efforts helped Ningbo-Zhoushan increase the volume of backhaul empty containers by 32% as of June 20, local media reported.

Meanwhile, infrastructure investment and facility construction at the port complex goes on despite the health crisis.

The smart port project in Meishan Port Area — jointly developed by Ningbo-Zhoushan Port, China Mobile, Zhenhua Heavy Industries Co and Huawei — is expected to see progress by end-2021, with berth operations starting to be taken over by remote-controlled cranes and tractors.

In another port area, the construction of Chuanshan — the Yuan43bn number one container terminal — was completed in April, pushing the number of box berths to 11, with a combined handling capacity of 10m teu.

The goal set by the local government is for Ningbo-Zhoushan to top 40m teu in throughput by 2025 — a level that would be on par with the current throughput at Shanghai, the world's busiest container port.

For the first five months of 2021, Ningbo-Zhoushan handled 13.2m teu, up 13.2% compared to the year-ago period.

Volume handled by its rail-sea transport jumped 32.7% to 470,000 teu over the same period.

In July, Shanghai-listed Ningbo-Zhoushan Port Co, the port's main operator, agreed to issue 3.6bn shares to state-owned China Merchants Port Group (CMPort), making the latter its second-largest shareholder.

It was part of a cross-holding agreement between CMPort and Zhejiang Provincial Seaport Investment & Operation Group, NZPC's parent, to strengthen their partnership amid Beijing's continued push for consolidation in the sector.

The tie-up has also fuelled expectations on the further collaboration between Ningbo-Zhoushan and nearby Shanghai.

CMPort owns 26.8% of Shanghai International Port Group, the main operator of the world's busiest container port, which took a 5% stake in Ningbo-Zhoushan Port Co in January 2020.

SIPG said at the time that the deal would serve Beijing's national strategy to make the YRD region an integrated economic zone to spur further growth.

Port authority: Ningbo Municipal Transport Bureau, Ningbo Municipal Port Administration Bureau, No 117 He Ji Road, Ningbo, China

Website: www.nbjt.gov.cn

Email: webmaster_nb@zjt.gov.cn

Terminals (Operators):

Ningbo Beilun International Container Terminal/
Ningbo Beilun First Container Terminal (Ningbo Port Group and Hutchison Port Holdings)

Beilun Second Container Terminal
(Ningbo Port Group)

Ningbo Yuan Dong Terminals* (Ningbo Port Group, Cosco Pacific, OOCL Terminal Ningbo, State Development & Investment Transport Holding)

Ningbo Gangji (Yining) Terminal*
(Ningbo Port Group, Ninterin Ltd)

Ningbo Daxie China Merchants International Container Terminal (China Merchants Holdings International, Ningbo Port Group and China International Trust & Investment Corp)

Ningbo Meishan Island International Terminal
(Ningbo Port Co, Ningbo Meishan-Island Development and Investment Co)

Zhoushan Yongzhou Container Terminal (Ningbo-Zhou Port Co)

*These two terminals are now managed by Beilun Third Container Terminal



Shenzhen:
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the south
China market.

China
Merchant
Ports

04 / Shenzhen (China)

NO CHANGE

Throughput 2020: **26,550,000 teu**, **3%** (2019: 25,770,000 teu)

Chinese port acknowledges the challenging trading conditions but overcomes them successfully

THE port of Shenzhen acknowledged the challenging trading conditions in 2020 but also proved it overcame them successfully.

It managed a 3% rise in throughput and pulled ahead of rivals Guangzhou and Hong Kong, which both posted flat to negative growth.

The performance seen in September is characteristic of how the year panned out for Shenzhen, the fourth-busiest port in Lloyd's List's Top 100 Container Ports, which dominates the south China market.

A V-shaped recovery saw it setting a single-month record throughput on the way to posting a volume of more than 26.5m teu for the year, despite the sharp drops seen during the worst of the coronavirus outbreak.

The steep falls in the first half and quick recovery in the second half were seen in both key components of the port — the west Shenzhen sector, dominated by China Merchants Port; and the eastern side, run by Hutchison's Yantian International Container Terminal — with both operators reporting similar trends.

CMPort said the group was impacted by the coronavirus pandemic, deglobalisation and geopolitical tensions amid a declining global economy.

Export-focused YICT, meanwhile, saw first-half outbound cargoes to the US and Europe slide 17% and 10%, respectively, year on year.

This was dramatically reversed in the second half, however, with comparative increases of 24% and 18%, respectively.

Despite these trying conditions, the respective port operators persevered and took advantage of the investments already made to optimise efficiency.

They continued to work on increasing services and networks while also investing in futureproofing the port, such as with automation and 5G, as well as carrying out basic port infrastructure enhancements.

In all, Shenzhen port opened up eight new international cargo routes in 2020.

YICT saw 11 new service calls, while CMPort started focusing on developing synergies with its

newly integrated Liaoning Port Group amid China's dual-circulation domestic consumption policy by initiating several north-south corridor special services.

Of note, YICT's investments in quayside infrastructure and mega boxship focus have especially benefitted from the post-lockdown consumer demand surge.

Spikes in cross-border e-commerce volumes out of south China were ably met, with the terminal setting records for both monthly throughput and the simultaneous handling of five ultra large containerships.

CMPort, meanwhile, is pumping money into a combination of old and new school measures.

The main approach Tonggu Channel is being deepened to 17.5 m while a slew of deals has been sealed on smart port developments, blockchain and the general integration of the Guangdong-Hong Kong-Macao Greater Bay Area.

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CMPort managing director Bai Jingtao said he saw four major changes in the industry: the global economy and import and export patterns will change, as will customer groups and the use of digitalisation.

While the construction of the group's Mawan Smart Port is ongoing, with the first of two berths completed, it has also signed an agreement with e-commerce giant Alibaba and its fintech arm Ant Group to integrate trade finance and logistics.

It is also working on the Guangdong-Hong Kong-Macao Greater Bay Area port logistics and trade facilitation blockchain platform project to use blockchain for logistics and customs clearance.

At the provincial level, there are grand plans to further promote the GBA by increasing connectivity, while also plugging into wider national plans to boost greater containerisation for domestic cargo.

The port opened 60 GBA barge freight routes, established seven inland ports, and operated 15 sea-rail combined transport lines in 2020.

This includes enhancements to the provincial feeder network, such as single customs declarations for connections between Yantian and Huizhou and Shekou and Shunde in what it dubs 'combined ports'.

A similar pilot project is planned for Humen in the production hub of Dongguan.

Shenzhen's position as China's southern gateway seems relatively secure after emerging stronger from the upheavals of 2020.

Along with Ningbo-Zhoushan — with which it is almost neck and neck in terms of growth — Shenzhen is one of the few ports in the top 10 to have posted throughput gains in the tough year.

The others to see positive results were Qingdao and Tianjin, fellow Chinese ports earmarked as new gateways, which both overtook the ports immediately above them in the rankings: Busan and Hong Kong, respectively.

Whether this is indicative of temporary coronavirus-related shifts in trade patterns or part of

a more long-term realignment due to domestic policy is unclear for the moment.

What is obvious, however, is that the established order, even of relatively recent times, will continue to be shaken up.

With an almost 10m teu gap to second-placed Singapore and Shanghai's even bigger lead, it seems unlikely their respective positions will be challenged.

However, Busan and Hong Kong could slip further down the rankings in the not-too-distant future.

Port authority: Transport Commission of Shenzhen Municipality, 16 Zizhu 7th Rd, Futian, Shenzhen, Guangdong, China, 518040

Website: jtys.sz.gov.cn

Email: jttx12328@sztb.gov.cn

Terminals (Operators):

Shekou Container Terminals (China Merchants Port Group)

Chiwan Container Terminal (China Merchants Port Group)

Yantian International Container Terminals (HPH Trust)

DaChan Bay Terminal (Modern Terminals and Shenzhen Yantian Port Group)

Mawan Container Terminal (China Merchants Port Group, China Everbright Holdings, China National Foreign Trade Transportation and Nanhai Oil Shenzhen Development)

05 / Guangzhou (China)

NO CHANGE

Throughput 2020: **23,505,300 teu**, **1.2%** (2019: 23,236,200 teu)

The major gateway port in southern China is put to the test by the Yantian port crisis

THE full-year handling growth of 1.2% in 2020 can hardly satisfy Guangzhou, home to one of the world's busiest container ports, located in the Pearl River Delta, China's southern economic powerhouse.

In its annual report to the municipal government, the local port authority said the main challenges facing the port's development included the impact of the pandemic on port operations, as well as the infrastructure bottleneck.

These issues have been put in the spotlight since late May, when

Yantian International Container Terminals in nearby Shenzhen became paralysed by a coronavirus outbreak and Guangzhou's Nansha port started to be used by carriers as an alternative.

The latter was soon clogged by a massive shift of cargo flows as its maximum handling capacity is a lot smaller than the former.

At one point, storage yard density at Nansha reached 100% and the waiting time topped four days.

Moreover, stricter preventive measures at ports, triggered by a resurgence of infections

in Guangzhou city between May and June, have further slowed logistics.

Local tractor drivers, for example, were asked to test negative for the virus every two days.

However, as Yantian recently resumed operations, the pressure on Nansha was expected to gradually ease.

That will allow Guangzhou to return to its focus on the longer-term development.

Construction of the first berth of the Nansha phase 4 project is nearly completed, but more needs to be done.



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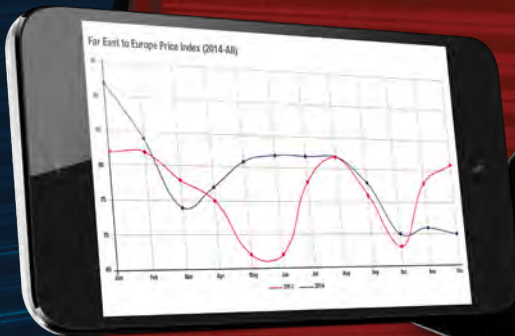
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South East Asia	Algeria	Canary Islands	France MED	Germany West	Spain MED	Tunisia	Other West Med & North Africa	Total
Indonesia	773	0	0	0	0	0	0	773
Korea	0	0	0	0	0	0	0	0
Malaysia	0	0	0	0	0	0	0	0
Philippines	0	0	0	0	0	0	0	0
Singapore	18	0	0	0	0	0	0	18
Thailand	48	0	0	0	0	0	0	48
Vietnam	504	0	0	0	0	0	0	504
South East Asia Total	1,343	0	0	0	0	0	0	1,343
Algeria	0	0	0	0	0	0	0	0
Canary Islands	0	0	0	0	0	0	0	0
France MED	0	0	0	0	0	0	0	0
Germany West	0	0	0	0	0	0	0	0
Spain MED	0	0	0	0	0	0	0	0
Tunisia	0	0	0	0	0	0	0	0
Other West Med & North Africa	0	0	0	0	0	0	0	0
Total	1,343	0	0	0	0	0	0	1,343

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Guangzhou:
pressure on Nansha
Port was expected
to gradually ease.

Guangzhou
Port Group

Originally expected to be brought on stream by end-2020, the fully automated terminal project consists of four boxship berths with a design capacity to handle 4.9m teu of containers per year.

The schedule was later pushed back to 2021 — and even that appears uncertain now.

To enhance intermodal transport, the port authority is also planning to put the Nansha railway into operation in November.

The 88 km long railway will link the port area to Guangzhou city and three other big manufacturing hubs — Jiangmen,

Zhongshan and Fushan — in the Guangdong province.

In addition, efforts are being made to speed up the preparation for the construction of a few new projects, including a navigation channel around the Dahu Island to expand Nansha's capacity to receive large ships.

Guangzhou expects to achieve 24.1m teu in container throughput this year. It handled 969,000 teu in January-May, up 11.3%.

The aim for 2025 is 28m teu, alongside an increase in the number of liner services to 260 from 226 at the current level.

Port authority: Guangzhou Port Authority, 14-19F, No 406 Yanjiang East Road, Guangdong 510100, China

Website: gwj.gz.gov.cn

Email: dd@gzport.gov.cn

Terminals (Operators):

Henan Terminal (Guangzhou Port Group)

Guangjun Terminal (Guangzhou Port Group)

Huihang Terminal (Guangzhou Port Group)

Huangpu Old Port (Guangzhou Port Group)

Xinsha Terminal (Guangzhou Port Group)

Guangzhou Container Terminal (Guangzhou Port Group and PSA)

Nansha Terminal Phase I/Nansha Stevedoring (Guangzhou Port Group, CS Terminal and Guangzhou Nansha Assets Operation Company)

Nansha Terminal Phase II/Guangzhou South China Oceagate Container Terminal (Guangzhou Port Group, Cosco Pacific and APM Terminals)

Nansha Terminal Phase III/Nansha International Container Terminal (Guangzhou Port Group)

06 / Qingdao (China)

71

Throughput 2020: **22,010,000 teu**, **7.4.8%** (2019: 21,010,000 teu)

Trade at northern China's busiest port rebounds strongly during the second half to more than offset pandemic-triggered losses

QINGDAO braved its way through the coronavirus pandemic-linked disruptions to post a 4.8% throughput expansion to just over 22m teu in 2020.

The pandemic also failed to prevent the northern Chinese port from boosting its productivity, enhancing multimodal connectivity by embracing artificial intelligence and pioneering the use of green energy in its operations.

In February, when the Chinese government made a call to extend public holidays in a bid to contain the coronavirus outbreak — then seen as spreading from the epicentre of Wuhan — the port promptly moved to waive storage fees for loaded containers.

Nonetheless, top container lines Maersk and MSC had to suspend their Asia-Europe services linking the northern Chinese port to its counterparts in Europe.

Later in September, another coronavirus scare forced Qingdao to roll out tests for both port workers and seafood imports.

Despite this, China's economy has rebounded quickly, along with resumption of industrial activity after emerging from a lockdown over an extended Lunar New Year holiday season.

The world's second-largest economy wrapped up the first pandemic-hit year with a



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Qingdao: ranked fifth on throughput among China's coastal ports in 2020.

ZUMA Press Inc/Alamy Stock Photo

2.3% increase in gross domestic product on a 1.5% increase in exports and imports of goods.

Its coastal ports started turning around from last June.

As with previous years, Qingdao ranked fifth on throughput among China's coastal ports in 2020.

Undeterred by the pandemic-triggered disruptions, the port went on to smash its own record: the single-machine average operating rate at its fully automated terminal reached 44.6 units per hour in April.

Qingdao also added 20 more services last year, including six feeder services connecting to other ports in its home province of Shandong.

It took the lead in China to deploy trucks and rail cranes powered by hydrogen.

Shoreside power or cold ironing for vessels calling at the port also reached 100% last year.

Last November, construction began on a smart air-rail collection and distribution system at the fully automated Qingdao Qianwan Container Terminal.

The system, which rides on a 5G, big data platform, calls for containers to be transferred between the seaport and the railway station.

The entire air track will span 9.5 km and boast 1.5m teu handling capacity. This new system is expected to go on trial later this year.

Qingdao is the only port in China to feature on Taiwanese shipping line Wan Hai's first service connecting Asia with Central and South America.

Wan Hai has lined up 10 ships of 2,200 teu capacity for its new weekly service, which commenced sailing in June.

Qingdao also features on the port rotation for two new intra-Asia services launched by Japanese container line Ocean Network Express in April.

The first connects China with Thailand and the Philippines, while the second links the Far East economic powerhouse with Indonesia and Malaysia.

Port authority: Qingdao Port International Co Ltd, 7 Ganghua Road, City North District, Qingdao, Shandong Province, PRC

Website: www.qingdao-port.com/en

Email: qggj@qdport.com

Terminals (Operators):

Qianwan Port Area (QQCT, QQCTU, Qiangang Branch, West United, and Qingdao Port Logistics)

Huangdao Oil Port Area (Qingdao Shihua)

Dongjiakou Port Area (Dongjiakou Branch, QDOT, Huaneng Qingdao, Qingdao port

Dongjiakou Multi-purpose Terminal Co Ltd, Qingdao Shihua, Mercuria Oil Terminal,

Mercuria Logistics and Datang Port)

Dagang Port Area (Dagang Branch)

07 / Busan (South Korea)

▲1

Throughput 2020: **21,824,000 teu**, ▲0.8% (2019: 21,992,001 teu)

Drawing on volumes diverted from neighbouring ports in China, South Korea's busiest container port holds up better than most of its peers

BUSAN'S transhipment volumes expanded by 3.3% last year, partly offsetting the pandemic-triggered damage

afflicted on its home economy. Container throughput handled by South Korea's busiest port almost emerged

unscathed, slipping just 0.8% to 21.8m teu, dragged down by a 5.3% contraction in its gateway trade.

Busan benefitted from trade diversion from ports in neighbouring China.

It transhipped 41.9% and 37.5% more boxed cargoes bound for Shanghai and Ningbo, respectively, between January and October 2020.

However, it was not spared the logistical challenge of coping with a sharp spike in shipping demand that ensued after major economies emerged from extended lockdowns.

Ocean Insights assessed Busan's transshipment rollover ratio at 30% in November and 33% in December.

Still, its box traffic held up relatively well through the pandemic, which bolstered the outlook for performance and infrastructure investments in the pipeline.

The Busan Port Authority has lifted its target throughput for this year to 22.7m teu, a 4.3% increase on year and up from the previous forecast of 22.5m teu.

This builds on 12.7m teu target transshipment volume, also up 200,000 teu from the last forecast.

BPA has set aside an annual budget of more than Won1.3trn (\$1.14bn), including Won986.7bn for capital expenditure.

Some Won32.2bn was allocated to establish a smart shipping and logistics system, green and safe port infrastructure.

Construction work for the Busan New Port West Container Terminal Development has been going on in phases.

Phases 2-5 and 2-6, which are ongoing, will altogether add five berths for containerships of 4,000 teu and above, targeted to enter operation in July 2023 and July 2026.

Busan surpassed the previous high set for unloading containers from a single ship earlier in 2021. Some 13,719 teu were unloaded from MSC INGY, an oceangoing boxship plying Asia-Europe trade, which entered the port in February.

This is 3,000 teu more than the next-best record of 10,462 teu, set in 2016.

BPA has teamed up with local small to medium-sized enterprises on a three-year research and development project to boost productivity of port operations.

BPA also aims to pilot the use of a 5G digital twin smart port logistics platform for smart containerships by the end of 2021.

This platform allows terminal owners, shipowners

and other port users to tap virtually replicated scenarios to optimise decision-making on their operations.

The project attracts Won4.6bn of funding, with Won3.2bn coming from the government and Won1.4bn from the private sector.

BPA is also looking to apply 5G network and computing during the second half of 2021 to facilitate remote control over cranes and other equipment used to unload container vessels.

The port authority has tapped home-grown mobile technology provider LG to set up the 5G network.

Port authority: Busan Port Authority, 46, Street 9, Chungjang-daero, Jung-gu, Busan, 600-755, South Korea.

Website: www.busanpa.com

Email: info@busanpa.com

Terminals (Operators):

North Port:

Jaseongdae Container Terminal (Hutchison Korea)

Singammam Container Terminal (Dongbu Busan Container Terminal)

Busan Port Terminal – created from the merger of Gamman Container Terminal and Sinseondae Container Terminal (Sinokor, KX Holdings)

New Port:

New Pier 1 (Pusan Newport International Terminal)

New Pier 2 (Pusan Newport Co)

New Pier 3 (Hanjin Newport Container Terminal)

New Pier 4 (Hyundai Pusan Newport Terminal)

New Pier 5 (Busan Newport Container Terminal)



Busan: benefitted from trade diversion from ports in neighbouring China.

Busan Port Authority

TANGER MED, THE LEADING PORT IN THE MEDITERRANEAN AND AFRICA



Tanger Med is a global logistics hub connected to more than 180 ports worldwide with handling capacities of 9 million containers, exports of 1 million vehicles, transit of 7 million passengers and 700.000 trucks on an annual basis. Its performance positions it today among the most competitive platforms on an international scale.

Tanger Med is strategically situated on the Strait of Gibraltar, the second crossing point of global trade, at the crossroads of major maritime routes. It is a natural transshipment hub for global logistics flow linking Asia, Europe, the Americas, and Africa.

08 / Tianjin (China)

71

Throughput 2020: **18,353,100 teu**, **7 6.3%** (2019: 17,264,000 teu)

The so-called 'liang gang yi hang' business model is being promoted by the northern Chinese hub as a main driver for volume growth

AS A major gateway port in northern China that feeds the country's capital city Beijing, Tianjin's container shipping throughput maintained a healthy growth in 2020, despite the coronavirus disruptions.

The results should be partly attributed to the economic recovery in the second half of the year and partly to the port's continued efforts to expand connectivity and improve efficiency.

Last year, Tianjin added nine services linking the Asean countries, key trading partners to China. These include routes to Ho Chi Minh City in Vietnam and Sabah in Malaysia.

On domestic trade, the enhanced daily feeder services in the Bohai Rim has helped speed up logistics flows, benefitting Tianjin as the largest export/import hub in the region.

Meanwhile, the so-called "liang gang yi hang" business model is being promoted as a main driver for volume growth.

The model enables an exclusive service between Tianjin and another major Chinese port, under which the two sides will prioritise

the handling of each other's cargo and share information about the status of their vessels and berths in a real-time manner.

So far, three ports — Xiamen in Fujian, Nansha in Guangzhou and Qingzhou in Guangxi — have signed up for the service.

Tianjin saw its volume handled via the solution rise by 26.4% year on year to 786,000 teu in the first quarter of 2021.

A developed railway system is also not being overlooked as an important extension and complement of seaborne trade.

Via stations in Mongolia, trains from Tianjin allow export cargo to directly reach Europe.

Its sea-rail transport volume surged by 40% to more than 800,000 teu in 2020, with the launch of the Tianjin-Urumchi service in late December.

On the technology front, a project is being undertaken to convert the Tianjin Five Continents International Container Terminal into a fully automated facility, backed by cutting-edge technologies such as artificial intelligence and 5G connections.

One of the berths has now completed the conversion and is capable of fully unmanned operations, which can reduce energy consumption by 20%, increase handling efficiency by 20% and cut labour costs by 60% when compared to a conventional box berth, according to the terminal operator.

The central government has positioned Tianjin as a pivotal international shipping hub in northern China, which targets 25m teu in throughput for 2025.

Port authority: Tianjin Port (Group) Co, 99 Jingang Road, Binhai New Area (Tanggu), Tianjin 300461, China

Website: www.ptacn.com

Email: admin@ptacn.com

Terminals (Operators):

Second Stevedoring Company Terminal (Tianjin Port Group)

Tianjin Port Container Terminal (Tianjin Port Holdings, New World (Tianjin) HK, NWS Holdings, Cosco, China Shipping and China Merchants Group)

Tianjin Port Alliance International Container Terminal (Tianjin Port Group, PSA International, OOCL, APM Terminals Tianjin)

Tianjin Port Euroasia International Container Terminal (Tianjin Port Group, Tianjin Port Holdings, Cosco Pacific and APM Terminals Tianjin)

Tianjin Port Pacific International Container (PSA International and Tianjin Port Co)



Tianjin: added nine services linking the Asean countries.

Zoonar GmbH/Alamy Stock Photo

09 / Hong Kong (China)

1

Throughput 2020: **17,953,000 teu**, **↓ 2.2%** (2019: 18,361,000 teu)

Port sees competition heat up further, resulting in a decline in container throughput

HONG Kong's container trade has been exposed to disruption from geopolitical issues and the coronavirus pandemic.

Container throughput has been hit by a persistent contraction since 2017, when it was up at 20.8m teu, and has slipped to just under 18m teu in 2020.

Despite all the challenges arising from the pandemic, Hong Kong claimed to be the preferred terminal for the industry's 'detention in transit solution'.

This occurred when the coronavirus outbreak resulted in longer cargo dwell times in other terminals, while Hong Kong also served as a carriers' empty repositioning hub.

The port is set to seize opportunities from the Guangdong-Hong Kong-Macao Greater Bay Area project to expand its route network and become an integral part of the world's largest container port cluster.

Yet an entrenched trade war could accelerate Hong Kong's decline due to a radical

reconfiguration of global supply chains.

This may happen if Chinese companies move more production to other countries that are closer to rival transshipment ports like Singapore or Tanjung Pelepas in Malaysia.

Hong Kong, with its strategic location at the doorstep of mainland China and at the centre of Asia, is leveraging on its strong international connectivity and enhancing its position as a regional transshipment hub.

However, the port has faced fierce competition from terminals in south China.

To cope with rising competition from other logistics and port operators around the region, Hong Kong's port has undergone successive expansions nearly every decade since it was completed in the 1970s.

The nine container terminals in the Kwai Chung-Tsing Yi area handle about 80% of Hong Kong's container throughput and can support 24 cargoships berthed

simultaneously, with a total handling capacity of more than 20m teu per year.

The Kwai Tsing Container Basin and its approach channel have been deepened to a navigation depth of about 17 m, enabling the new generation of ultra large containerships to use the port at all tides.

Hong Kong has also approved the long-awaited lifting of air draught restrictions for mega ships using a key waterway, creating an opportunity for the Asia shipping hub to attract more liner services.

The height limitation at Tsing Ma Bridge will be relaxed from 53 m above sea level to 54.6 m at any time and 57 m during a period of specified hours, effective from January 28, the city's marine department said.

Vessels taller than 57 m will need to seek prior permission from the authority if they wish to enter or sail through the area during a low-tide period.

Still, a large part of Hong Kong's port decline can also be



Hong Kong: leveraging on its strong international connectivity and enhancing its position as a regional transshipment hub.

HKSAR marine department

attributed to its slow adoption of technological innovation, such as automation, compared to its Chinese rivals.

Other ports, such as Ningbo and Shanghai, have thrived using greenfield and brownfield automation.

To enhance the overall efficiency of the port, Hongkong International Terminals has launched its remote reefer container-monitoring system. This enables round-the-clock automated remote management of all refrigerated containers.

The system allows for greater insight on container conditions, such as temperature, humidity and CO2 levels, which will greatly enhance the terminal's operational efficiency and occupational safety, increasing its competitiveness in the growing cold chain logistics market.

The port also has bold ambitions to expand its terminal yard space and provide additional barge berths in Kwai Tsing Container terminal.

Latest additions to the port include the modifications of

super-post-panamax quay cranes to strengthen their structure, which would enable them to withstand strong winds; and engineering clerk shifts for remote rail-mounted gantry crane and rubber-tyred gantry crane operations during fault handling.

Meanwhile, The Hong Kong Seaport Alliance has passed the first stage towards getting the green light from the city's Competition Commission, having made efforts to address competition concerns — particularly in the Hong Kong Gateway market, where the alliance partners have a high combined market share and where there is a lack of alternatives.

The Hong Kong Seaport Alliance is a contractual joint venture between four out of the five container terminal operators in Hong Kong and was formed in April 2019.

The terminal operators — Hongkong International Terminals, Modern Terminals, Cosco-HIT Terminals and Asia Container Terminals — jointly operate and manage 23 berths across eight terminals at Kwai Tsing

container port through operational, commercial and financial co-ordination.

Only Goodman DP World Hong Kong, which operates Container Terminal 3, is not a member of the alliance.

The commission had said the alliance members' dominance in the Gateway market was “unlikely to be subject to effective competitive constraint” and they could potentially increase charges, or reduce service levels, to the detriment of their customers.

Port authority: Hong Kong Marine Department, Harbour Building, 38 Pier Road, Central, Hong Kong

Website: www.mardep.gov.hk/en/home.html

Email: mdenquiry@mardep.gov.hk

Terminals (Operators):

Terminal 1 (Modern Terminals)
Terminal 2 (Modern Terminals)
Terminal 3 (Goodman Hong Kong Logistics Fund and DP World)
Terminal 4 (Hongkong International Terminals)
Terminal 5 (Modern Terminals)
Terminal 6 and 7 (Hongkong International Terminals)
Terminal 8 East (Hongkong International Terminals and Cosco)
Terminal 8 West (Asia Container Terminals)
Terminal 9 North (Hongkong International Terminals)
Terminal 9 South (Modern Terminals)

10 / Rotterdam (Netherlands)

↔ NO CHANGE

Throughput 2020: **14,349,446 teu**, **↓ 3.1%** (2019: 14,810,804 teu)

Europe's largest box port sees a dip in volumes as first blankings and then congestion affect throughput

AT ONE point last year, Rotterdam thought it might see a downturn in volumes of as much as one-fifth as the impact of the pandemic began to be felt in Europe.

Fortunately for Europe's largest container hub, the worst did not come to pass. The resurgence in volumes in the second half of the year meant that by year-end, throughput was down by only 3.1%.

However, for a port of this size, that still represents the loss of nearly half a million teu

across the docks at its various container terminals.

Rotterdam remains the largest port in terms of box volumes outside Asia and is the only non-Asian port in the top 10.

In the first quarter of 2020, volumes fell 4.7% as an already moribund European economy began to feel the first impact of the pandemic, with volumes ex-China dropping dramatically.

However, chief executive Allard Castelein insisted the port was a “vital process” and would

continue “contributing to society” throughout the pandemic.

By the end of the first half of the year, there was still little respite for Rotterdam, which reported throughput had shown a steep fall during the peak of the pandemic.

It reported a 7% decline in volumes during the first six months of 2020, after losing 20% of its scheduled services in May and June.

However, the fall in volumes was less pronounced than the decline in the number of vessel calls because



Rotterdam: remains the largest port in terms of box volumes outside Asia.

Eric Bakker/Port of Rotterdam Authority

of the increased size of ships calling at Rotterdam.

Still, the second quarter was “better than expected”, given the negative economic impact of the pandemic following the stabilisation of the first wave.

By July, Rotterdam had witnessed a surprise upsurge in exports to Asia.

Despite a 6.7% overall decrease in containers to Asia, exports of laden boxes spiked by 13.5%, up 135,000 teu, in the same period.

This rise in loaded export containers consisted mainly of cargo bound for China and comprised both reefer and non-reefer cargo containing fresh produce, such as pork, chemicals for pharmaceuticals and milk powder.

The increase in full export containers was due to a combination of higher market share in transshipments from the Scandinavia and Baltic area, comprising about one-quarter of the rise in volume, with the rest coming from European hinterland cargo.

In the second half, an increase in demand for containerised cargo as

consumers changed their spending from services to goods saw a rise in congestion, as terminals were forced to work more slowly due to hygiene restrictions.

This, as well as issues with inland storage and distribution, also saw the number of empties being returned to Asia slide.

Yet the pandemic was not the only event to bring about changes at Rotterdam. There were also changes of ownership at its terminals.

In March, CMA CGM completed the first transaction in the sale of eight terminals to its Terminal Link joint venture, as the French carrier sought to shore up its finances and reduce its debts.

The deal, which was announced the previous November, saw 10 terminals transferred from the carrier’s direct ownership to Terminal Link, in which it holds a 51% stake. Its partner, China Merchants Port, holds the remaining 49%.

Among the first to transfer ownership was Rotterdam World Gateway.

Meanwhile, a deal between Hutchison Ports and APM Terminals,

which was announced in late 2019, was germinated throughout 2020, resulting in the completion of the sale of the APMT Rotterdam terminal in May 2021.

The terminal, which is adjacent to Hutchison’s ECT Delta terminal in the Maasvlakte complex, had been surplus to APMT’s requirements since it opened its Maasvlakte II facility in 2015.

Hutchison, which owns the Euromax terminal in Rotterdam, will maintain the renamed Hutchison Delta II facility as an independent unit and has secured volume commitments from Maersk.

It has also indicated it is interested in expanding the lease for the terminal, which expires in 2025.

Port authority: Port of Rotterdam Authority, PO Box 6622, NL-3002 AP Rotterdam, Netherlands

Website: www.portofrotterdam.com

Email: info@portofrotterdam.com

Terminals (Operators):

APMT Maasvlakte II (APM Terminals)

Rotterdam World Gateway (DP World)

Barge Center Waalhaven

Delta Container Services (Kramer & ECT)

Hutchison Ports Delta II, ECT Delta

Barge Terminal, ECT Delta Terminal,

ECT Euromax Terminal (Hutchison)

Rotterdam Container Terminal (Kramer)

Rotterdam Short Sea Terminal (RSST)

11 / Dubai (United Arab Emirates)

↗ NO CHANGE

Throughput 2020: **13,488,000 teu**, ▼ **4.4%** (2019: 14,111,000 teu)

A third successive year of volume declines hits the Middle East's premier port and DP World flagship, but throughput finally starts to stabilise

DP WORLD flagship Jebel Ali in Dubai stayed put in Lloyd's List's rankings for 2020, holding onto its 11th position — but only just.

The UAE port, located south of Dubai's city metropolis, reported its third consecutive year of volume declines, falling 4.4% to 13.5m teu.

Naturally, like the majority of major ports, business was impacted heavily by Covid-19-induced disruption and subsequent lockdown restrictions, but 2020 marked another disappointing 12-month period for throughput numbers.

Once a mainstay in the top 10 ranked ports, Dubai lost its place last year to the gain of Europe's largest container facility Rotterdam, and the port is in danger of slipping further down the table.

Malaysian hub Port Klang is now snapping closely at its heels, only a few hundred thousand teu short of its total.

However, there are at least signs that volumes at the port are stabilising. DP World will be looking to 2021 for a return to the growth trail.

In the fourth quarter of 2020, Jebel Ali's volumes of 3.4m teu were up 0.3% on the previous year's three-month total.

The growth trend was continued in the first quarter of 2021, when volumes of 3.5m teu represented an increase of 2.6% on the corresponding period of 2020.

Encouraging as this is for DP World's prize port, volumes still fall a long way short of the levels required to push ahead with plans for a long-awaited fourth container terminal.

Expansion prospects, too, have been made all the much harder amid increasing competition in the Gulf region.

Most notably is the rise of Dubai's UAE competitor, Abu Dhabi, where the arrival of Cosco and Mediterranean Shipping Co as terminal concessionaires has boosted volume growth exponentially over the past 18 months.

Nevertheless, Dubai remains the largest port in the Middle

East — and by some distance. For example, it handled more than four times as much box cargo as compatriot Abu Dhabi in 2020. Its nearest rival, Jeddah, handled less than 5m teu last year.

Dubai, though, stands alone as the only major Middle Eastern port in our rankings not to be backed by carrier interests, whether through terminal stakes or tenancy.

The port's strategically located transshipment offering and supporting free zone has meant that the need for liner-affiliated backing through to now has not been deemed necessary.

However, if Dubai continues to lose regional market share in the coming years, this option could become increasingly attractive.

Port authority: DP World, PO Box 17000, Dubai UAE

Website: www.dpwworld.com

Email: info@dpworld.com

Terminals (Operators):

Terminal 1 (DP World)

Terminal 2 (DP World)

Terminal 3 (DP World)



Dubai: looking to 2021 for a return to the growth trail.

Reuters/Alamy Stock Photo

12 / Port Klang (Malaysia)

7 NO CHANGE

Throughput 2020: **13,244,423 teu**, **↓ 2.5%** (2019: 13,580,839 teu)

Increased demand for exports of PPE from Malaysia boosts the gateway box volume, partly offsetting the damage to transshipment trade

PORT Klang's throughput contracted 2.5% to reach 13.2m teu as the transshipment of containerised cargoes at Southeast Asia's second-busiest port slipped into the red.

The Malaysian port transhipped 8.1m teu of cargo last year, down from 8.5m teu the year before.

Its gateway container traffic, however, held up at just over 5.1m teu, a marginal increase from just under 5.1m teu.

Malaysia's exports of personal protective equipment have benefitted from the coronavirus outbreak and this contributed to Port Klang's higher gateway box traffic.

The port was nonetheless hit by moves by shipping lines to void sailings on services in order to trim capacity when trade slowed during the first half of 2020.

Port Klang features on the rotation of two such services, APL's Asia-Middle East Gulf Asia Express 2 and West Asia Express 2.

Orient Overseas Container Line also dropped the Malaysian port from the rotation for its SEAP-PSW service last April.

Westports, controlled by Westport Holdings, operates 20 berths at Port Klang.

MMC Corp's unit Northport holds the other 14 berths.

Westports accounted for 10.5m teu or 77% of container throughput at Port Klang in 2020.

Despite the void sailings on some services, intra-Asia trade still made up 61% of total containers handled by Port Klang's largest terminal operator.

Westports also noted a significant 21% hike in Asia-America container throughput last year.

At the start of 2020, it embarked on an expansion of its container



Port Klang: hit by moves by shipping lines to void sailings on services.

Westports

yard, which subsequently helped cope with demand for additional storage space induced by the pandemic-led supply chain disruption.

Despite slower traffic during the first year into the pandemic, the port operator saw its container revenue jump 4% on year, helped by a 10% expansion in the volume of refrigerated containers handled.

Its Yard Zone Z development, completed at the end of 2020, brought online 40 terminal tractors, 145 trailers and 12 rubber-tyred gantry cranes.

Still, empty containers have piled up at port yards worldwide on the back of a sharp rebound in trade since the second half of last year.

Westports has sought to ward off yard congestion by granting priority berthing to ships with more containers to be loaded than discharged.

Additionally, the Port Klang Authority has stepped in to open up special lanes to facilitate the release of reefer containers.

Westports is further looking to finalise details of a concession agreement with the Malaysian government to add 10 more terminals on a land parcel spanning 146.4 hectares.

This latest expansion plan will lift its annual handling capacity to 30m teu.

Executive chairman G. Gnanalingam said: "Despite lower container volume in 2020, the planning work continued unabated because of the long gestation period for the dredging, land reclamation, settlement and wharf construction."

Westports would be acquiring more terminal operating equipment for its existing container terminals, he added.

Port authority: Port Klang Authority, Mail Bag Service 202, Jalan Pelabuhan Utara, 42005 Pelabuhan Klang, Selangor, Malaysia

Website: www.pka.gov.my

Email: onestopagency@pka.gov.my

Terminals (Operators):
Westports (Westports Malaysia)
Northport (Northport Malaysia)

The strategically located hub at the crossroads of the Mediterranean



Malta Freeport is the ideal shipping lines' strategic partner enjoying an enviable location at the crossroads of the world's greatest maritime routes. The Company benefits from trustworthy and experienced shareholders providing a solid foundation for further growth. With over 30 years' experience in the shipping industry the Freeport is a fully fledged state-of-the-art Container Terminal poised to efficiently accommodate the latest class of 24,000 TEU vessels. Digitalisation is at the forefront of the Freeport's activities to further boost its competitive edge within the Mediterranean transshipment market to become a Port of the future.

Malta Freeport - *Fully prepared to embrace future challenges.*



13 / Antwerp (Belgium)

NO CHANGE

Throughput 2020: **12,031,469 teu**, **↑ 1.4%** (2019: 11,860,204 teu)

Volumes at the Belgian port still manage to gain some ground despite the impact of the pandemic

ANTWERP held onto its place as the second-largest box hub in Europe in 2020 and managed to increase volumes across its docks for an eighth consecutive year, despite the impact of the pandemic.

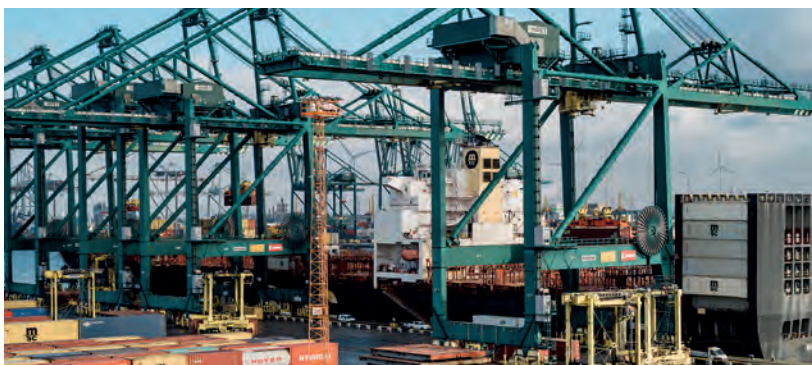
This was not always a given, however. In the early stages of the pandemic, the port warned that it could be facing a 15% downturn in volumes as carriers announced massive blanking programmes following a collapse in demand.

Nevertheless, as the initial shock of lockdowns began to fade, Antwerp was among the ports discovering that containerised freight declines might not be quite as drastic as those witnessed during the global financial crisis.

Despite a decline in the number of ship calls, the introduction of larger vessels with higher load factors meant that by the end of the first half of the year, Antwerp was already recording a 0.4% increase on the corresponding period of 2019.

By September, volumes were back on track and the port left the year in positive territory.

However, Antwerp is not resting on its laurels. At the beginning of



Antwerp: achieved growth for an eighth consecutive year.

Port of Antwerp

2021, it announced that its plan to merge with rival Zeebrugge, first discussed in 2018, was going ahead.

The two cities said the combined Port of Antwerp-Bruges would be Europe's "most important container port", its largest for vehicle transshipment and one of its largest for break bulk, with a total transit capacity of 278m tonnes a year.

The cities said the merger would let the port respond faster to the trends of energy transition, innovation and digitalisation, including as a hub for importing hydrogen and looking at carbon capture and storage.

Antwerp has also emerged successfully from the disruption that accompanied the UK's departure from the European Union. With the effective closure of the land bridge across the UK for cargoes from Ireland, shortsea services have emerged to take the load instead.

Port authority: Antwerp Port Authority, Port House, Zaha Hadidplein 1, 2030, Antwerp, Belgium

Website: www.portofantwerp.com

Email: info@portofantwerp.com

Terminals (Operators):

PSA Noordzee Terminal (PSA)

PSA Europa Terminal (PSA)

Antwerp Container Terminal (SEA-Invest Group)

MSC PSA European Terminal (MSC/PSA)

Antwerp Gateway Terminal (DP World)

14 / Xiamen (China)

NO CHANGE

Throughput 2020: **11,410,000 teu**, **↑ 2.6%** (2019: 11,122,200 teu)

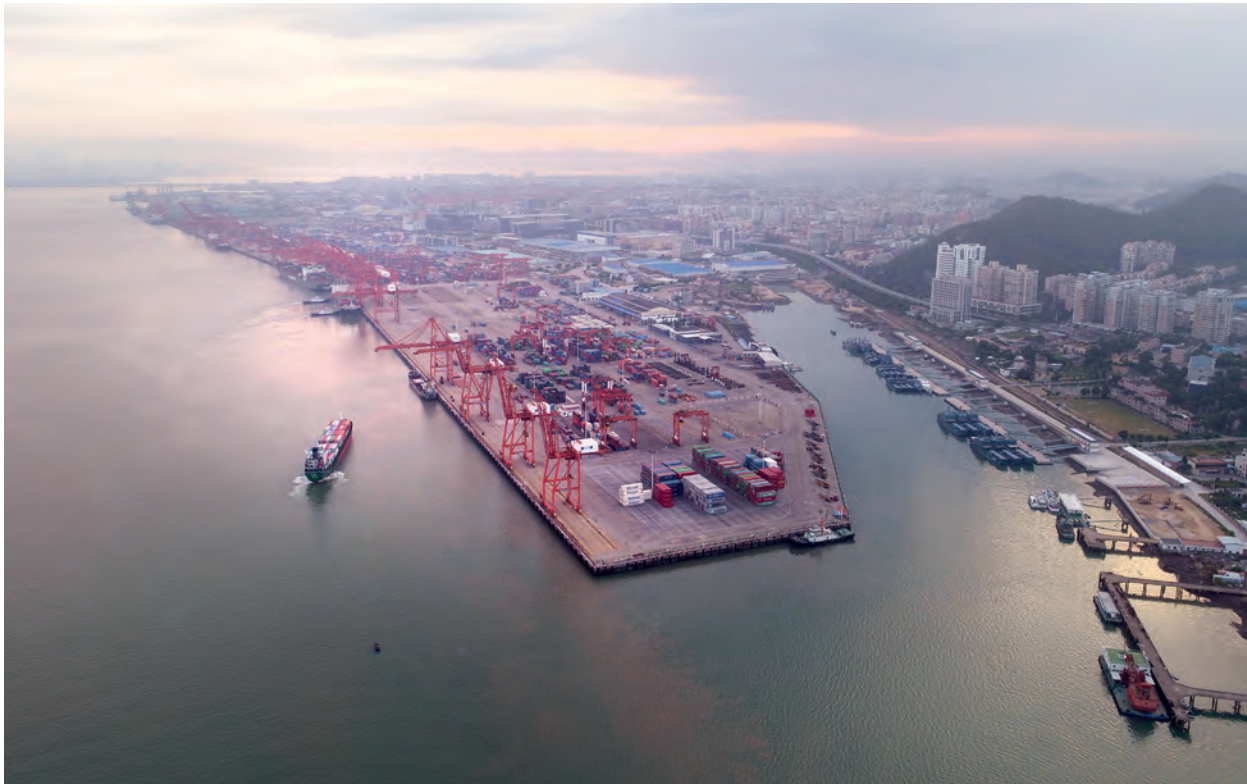
Practical measures quickly implemented by the port help it deal relatively well with the coronavirus outbreak

FUJIAN'S ports, of which Xiamen is the most prominent, finally joined the China port consolidation trend in 2020, being the last major cluster to announce the formation of a provincial-level group in August.

While this will undoubtedly have an impact on the future of Xiamen, as well as Fuzhou and Quanzhou — the two other major ports in the region — the year's respective performances have given

an indication as to how this might pan out.

Xiamen port dealt relatively well with the coronavirus outbreak, quickly implementing practical measures such as port fee



Xiamen: now has 70 routes through the Silk Road Shipping platform.

Xinhua/Alamy Stock Photo

reductions, diversifying services and improving efficiency to post a 2.6% rise in throughput, keeping its position as the leading port in the southeast region and within the 10m teu to 20m teu annual throughput category.

The port has been actively building networks through the Silk Road Shipping platform and now has 70 routes. Of these, 55 call Xiamen and eight new routes were introduced in 2020.

These routes basically leverage on China's catch-all Belt and Road Initiative, aiming to boost trade and logistics between the Asian giant and countries mainly in Southeast and south Asia, especially with smaller Asean region ports.

For example, RCL opened a route from Xiamen to Songkhla in southeast Thailand, becoming its 32nd Southeast Asian route. Also taking in Sihanoukville in Cambodia, the weekly service makes Xiamen its only mainland China call.

Meanwhile, the investment of Fujian Transportation Maritime Silk Road Investment and Management

Co in a 20% stake in China Merchants Port's Hambantota port project may boost Xiamen's connections into the south Asia part of the Belt and Road.

New domestic routes are also being developed as the port keeps stride with national imperatives, although the group's Quanzhou port seems to be the designated internal trade hub.

In 2020, a Southeast Logistics Channel was opened up between the Yangtze River Delta and the Pearl River Delta. Domestic line Zhonggu Shipping started services to Chaozhou port, connecting Xiamen to the regional container centre in the east of neighbouring Guangdong province.

Investments are also being made in green technologies, with the port putting into operation a first batch of 40 electric container tractors in 2020.

It is set to put 40 more similar vehicles into use in 2021, with a plan to fully electrify all tractor equipment in the port during the 14th Five-Year Plan period.

Meanwhile, the port's channel expansion project was completed, enabling two-way transits of large containerships.

Xiamen looks set to continue its important role as a southeast China port but recent trends suggest the pattern of low volume growth will continue unless new markets on its Silk Road Shipping platform bear more fruit.

Port authority: Xiamen Port Authority, 127 Dongdu Road, Xiamen, Fujian Province, China

Website: www.jtyst.fujian.gov.cn

Email: xmgkgjlbgs@126.com

Terminals (Operators):

Xiamen Haitian Container Terminal (Xiamen Container Terminal Group)

Xiamen Hairun Container Terminal (Xiamen Container Terminal Group)

Xiamen International Container Terminals (Xiamen Container Terminal Group and Hutchison Ports)

Xiamen Songyu Container Terminal (Xiamen Container Terminal Group and APM Terminals)

Xiamen Haicang Xinhaida Container Terminal (Xiamen Container Terminal Group and Xiamen Haicang Investment Group)

Xiamen Haitong Container Terminal (Xiamen Port Holding Group owned, Xiamen Container Terminal Group operated)

Xiamen Haitong Container Terminal (Xiamen Port Holding Group owned, Xiamen Container Terminal Group operated)

Xiamen Ocean Gate Container Terminal (Cosco Pacific and Xiamen Haicang Investment Group)

15 / Tanjung Pelepas (Malaysia)

73

Throughput 2020: **9,800,000 teu**, **7.7%** (2019: 9,100,000 teu)

Volume at the port is bolstered by exceptional demand arising from pandemic disruptions and supply chain dislocation

TANJUNG Pelepas had a record-breaking year in 2020, growing by a further 7.7% to 9.8m teu.

Growth was driven by exceptional demand arising from pandemic disruptions and supply chain dislocation.

This resulted in extra transshipment call volumes at the port arising from increased demand in Asia and Europe, as well as requests from customers to enlarge their throughput.

Local cargo volumes also improved as manufacturers ramped up production and export activities to clear coronavirus backlogs.

“PTP’s readiness and proactive drive to handle these demands have definitely cushioned the downside scenario and the impact of sluggish global trade seen earlier as a result of the Covid-19 outbreak and the measures taken by countries to halt the pandemic,” chief executive Marco Neelsen said.

“Despite some challenges during the second quarter of the 2020 financial year, the second half of the year was very positive for PTP, with an upsurge of volume due to the opening of countries’ borders and the reviving of the global trade economy for China, transpacific and Europe regions.”

The port, strategically located at the southern end of Malaysia and just across the strait from Singapore’s new megaport at Tuas, has also kept up its investments in new equipment and infrastructure.

It has invested more than RM700m (\$173m) to improve its container-handling capacity, capability and reliability.

This involved eight additional super-post-panamax quay cranes, 10 electrified rubber-tyred gantries and dredging the navigation channel to ensure the new generation of ultra large containerships can safely navigate to the port.

PTP also signed an agreement with Zhenhua Heavy Industries Company to procure seven new ship-to-shore quay cranes and 11 electrified RTGs.

The new cranes, which form part of the equipment modernisation strategy, will replace ageing assets that have been in service since 2002. They are scheduled to be delivered in the third quarter of next year.

Development work for the next phase of the port’s free zone expansion is also progressing.

The extension of Pelepas Free Zone, a continuation from the current model that is currently being developed for regional distribution centres with the necessary infrastructure, is set for leasing from 2022 onwards.

Port authority: Johor Port Authority, Jalan Mawar Merah 2, Pusat Perdagangan Pasir Gudang 2, 81700 Pasir Gudang, Johor.

Website: www.ptp.com.my

Email: ccm@ptp.com.my

Terminal (Operator): Pelabuhan Tanjung Pelepas (MMC Corporation)



Tanjung Pelepas: kept up its investments in new equipment and infrastructure.

Port of Tanjung Pelepas

16 / Kaohsiung (Taiwan)

1

Throughput 2020: **9,621,662 teu**, **7.7%** (2019: 10,428,634 teu)

Amid the slower container traffic in a pandemic-afflicted year, Taiwan's top container port goes ahead to expand its cargo-handling capacity

KAOHSIUNG is one transshipment port that is hurting from the trade flow disruption spilling over from the coronavirus pandemic.

The port, accounting for 70% of Taiwan's container throughput, handled 9.6m teu of cargo in 2020, down 7.7% on year.

Carriers have set out capacity cuts from January to May 2021, including blanked sailings due to lower demand caused by the Covid-19 pandemic, Taiwan International Port Corporation said.

Fewer vessels called upon Kaohsiung during the five months of the year, denting its freight volume, its port operator said.

The first-half slowdown, however, did not hold back Taiwan's home-grown shipping line, Evergreen, from pursuing a fleet renewal exercise to boost transpacific services offered out of Kaohsiung.

Evergreen took delivery of 16 containerships last year, including the 12,000 teu *Ever Forever* and *Ever Far*, which were deployed on Far East-US services.

Port operator TIPC has also embarked on the construction of a seventh terminal at Kaohsiung.



Kaohsiung: TIPC has embarked on the construction of a seventh terminal.

Taiwan International Ports Corporation

Slated to enter service in 2023 to 2024, the new terminal will be capable of handling 5m teu of cargo annually and dock four 24,000 teu containerships at one go.

It will also boast the latest automation backed by 5G technology.

Evergreen has penned a lease for five berths at the seventh terminal with TIPC.

Work also commenced on a new container transfer scheduling system aimed at alleviating cargo

traffic congestion and shortening container delivery times.

Port authority: Taiwan Internationals Ports Corporation; No 10 Penglai Road, Gushan District, Kaohsiung City 804, Taiwan

Website: www.twport.com.tw/en

Email: public@twport.com.tw

Terminals (Operators):

Terminal 1: Berths 42-43 (Lien Hai Container Terminal Company)

Terminal 2: Berths 63-64 (Wan Hai Lines); Berths 65-66 (OOCL)

Terminal 3: Berths 68-69 (APL); Berths 70 (Hong Ming Terminal & Stevedoring Corp, subsidiary of Yang Ming Marine)

Terminal 4: Berths 115-117 (Evergreen Line); Berths 118-119 (Hyundai Merchant Marine); Berths 120-121 (Taiwan International Ports Corporation)

17 / Los Angeles (United States)

1

Throughput 2020: **9,213,400 teu**, **1.3%** (2019: 9,337,632 teu)

Topsy-turvy and resilient are the best phrases to use in connection with the port during 2020

TOPSY-TURVY is the perhaps best phrase to use in connection with the Port of Los Angeles during 2020. That, and highly resilient.

The two phrases apply to the same phenomenon that struck the world in 2020: the Covid-19 outbreak.

The port saw its containerised throughput decline sharply in March, with just 449,568 teu passing through the docks — a

decline of 31.9% over March 2019, and its lowest monthly figure for the year.

Indeed, the port saw year-over-year declines for the first seven months of 2020, compared with 2019.

In March, port executive director Gene Seroka recognised the downward trend, attributing it to low levels of factory production in China.

However, he also recognised that throughput would soon rise again, saying: “We’re actively working with our supply chain partners to be prepared for a cargo surge once production levels ramp up.”

Things did begin to turn around in August, when the port saw its first month of improvement over 2019, as 961,833 teu crossed the docks, representing an increase of 11.7%.

The rising throughput continued for the remainder of 2020, reaching its highest point in October with 980,729 teu — a 27.3% increase over 2019.

A main consequence of the rise in volumes was increasing numbers of containerships being sent to



Los Angeles: saw a slight downtick in throughput for 2020.

Port of Los Angeles

anchor, as berths at the port filled to capacity as a result of the import surge.

The backlog of ships continued through the end of 2020 and on into 2021, with a high of 40 vessels at anchor in February 2021.

Construction is ongoing at the Everport Container Terminal to deepen berths and improve terminal facilities, which will allow the terminal operator to accommodate the larger next-generation vessels.

This \$65m project will improve Berths 226-229, increasing berth

depth from 45 ft to 53 ft, and improve Berths 230-232 to a 47 ft berth depth.

Port authority: Port of Los Angeles, 425 S. Palos Verdes Street, San Pedro, CA, USA 90731

Website: portoflosangeles.org

Email: community@portla.org

Terminals (Operators):

Berths 100-102: West Basin Container Terminal (China Shipping)

Berths 121-131: West Basin Container Terminal (Yang Ming)

Berths 136-147: (TraPac)

Berths 212-225: (Yusen Terminals)

Berths 226-236: (Everport Terminal Services)

Berths 302-305: (Fenix Marine Services)

Berths 401-406: (APM Terminals Pacific Container Terminal)

18 / Hamburg (Germany)



Throughput 2020: **8,540,000 teu**, **↓ 7.9%** (2019: 9,274,215 teu)

German gateway expects a rapid rebound as China trade recovers

HAMBURG — one of Europe’s largest container ports, and home to Hapag-Lloyd and Maersk affiliate Hamburg Süd — took a fairly hefty hit on throughput in 2020, largely on account of the coronavirus pandemic. Total volume handled dropped nearly 8% to 8.5m teu.

That should not come as any surprise, given the port’s longstanding role in the Europe-Asia trade, particularly when it comes to China.

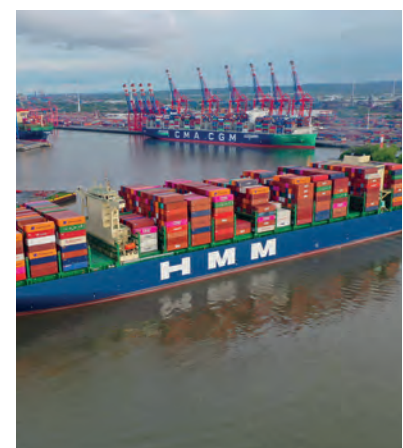
“The shutdown of many producer companies in China at the beginning of last year led to reduced demand, and the subsequent blank sailings

led to reduced throughput as well,” a spokesperson commented.

With the return of suspended liner services — and even possible gains — the port is hoping to claw back lost ground and, as of June 2021, was predicting volumes of 8.7m teu for the current year.

Recent developments include the completion of dredging works for fairway adjustment on the Elbe, thus ensuring that Hamburg can take calls from even the world’s very largest boxships.

As one local politician put it at a ceremony to mark the event: “A great day for the Port of Hamburg,



Hamburg: longstanding role in the Europe-Asia trade.

Port of Hamburg



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GLOBAL PORT EQUIPMENT  BETTER TOGETHER

finally able to fully exploit its market potential again. And a good day for the German economy, now assured of sustained high-performance access to world markets.”

In June 2021, Cosco Shipping Ports disclosed that it was in talks to acquire a minority stake in Container Terminal Tollerort, a wholly owned subsidiary of Hamburger Hafen und Logistik AG.

“HHLA expects the participation to strengthen the relationship

with its Chinese partner as well as to provide sustainable planning security for Container Terminal Tollerort in order to safeguard volume and employment in the port of Hamburg,” the German port operator said.

The Hamburg terminal is equipped with four container berths and 14 gantry cranes. It has a maximum draught of 15.1 m and is capable of handling ultra large containerships exceeding 20,000 teu.

Port authority: Hamburg Port Authority, Neuer Wandrahm 4, D-20457 Hamburg, Germany

Website: www.hamburg-port-authority.de

Email: info@hpa.hamburg.de

Terminals (Operators):

Containers:

Container Terminal Altenwerder (HHLA)

Container Terminal Burchardkai (HHLA)

Container Terminal Tollerort (HHLA)

Eurogate Container Terminal (Eurogate)

Multi-purpose:

Dradenau Vorhafen (Rhenus Midgard)

Oswaldkai Terminal (Unikai)

Rosshafen Terminal (Vollers)

Süd-West Terminal (C. Steinweg)

Wallmann Terminal (Wallmann)

19 / Long Beach (United States)

2

Throughput 2020: **8,113,300 teu**, **6.3%** (2019: 7,632,032 teu)

Port goes ‘from doom and gloom to fast and furious on the turn of a dime’

IN 2020, the Port of Long Beach went “from doom and gloom to fast and furious on the turn of a dime”, according to deputy executive director and chief operating officer Noel Hacegaba.

He said steep declines in the first half of the year were quickly followed by a cargo surge that “catapulted us to our best year on record: 8.1m teu”.

The port formed a business recovery taskforce to help manage the impacts of the pandemic.

This multi-disciplinary team focused on keeping port workers safe by supplying personal protective equipment; by establishing a Covid-19 test site that has administered more than 23,000 tests through 2021; and by prioritising the vaccination of waterfront workers.

The taskforce also kept the port open by advocating all levels of government to categorise port operations as an essential function; by sharing critical information with port customers and supply chain partners through the newly established weekly advance volume estimate report; by prioritising and expediting containers carrying PPE and



Long Beach: the new ‘bridge to everywhere’ carries 15% of the nation’s cargo.

Port of Long Beach

other Covid-19-related supplies; and helping port customers and industry partners navigate the pandemic.

The port also activated 40 acres of vacant land for short-term overflow resource operations at Pier S, enabling shippers and terminals to handle the record cargo surge by temporarily storing and staging their inbound and outbound containers at STOR.

Also, to speed throughput and reduce road traffic, the port partnered with its container terminal operators to establish a goal of at least 50% dual transactions for trucks. Heading into 2021, some port terminals

are already posting 70% dual transactions.

Not least, the Port of Long Beach replaced the old Gerald Desmond Bridge with the new — yet to be named — “bridge to everywhere”, which carries 15% of the nation’s cargo that reaches every region in the US.

Port authority: Port of Long Beach, 415 W. Ocean Blvd, Long Beach, CA 90802

Website: www.polb.com

Email: info@polb.com

Terminals (Operators):

Pier A: (SSA Terminals)

Pier C: (SSA Terminals)

Pier E: (Long Beach Container Terminal, Inc)

Pier G: (International Transportation Service)

Pier J: (Pacific Container Terminal)

Pier T: (Total Terminals International)

20 / Ho Chi Minh City (Vietnam)

7 5

Throughput 2020: **7,854,091 teu**, **7 4.3%** (2019: 7,531,054 teu)

Vietnamese port's growing importance continues to be on display

VIETNAM'S biggest port powered through coronavirus and saw an increase in throughput in 2020.

Despite the pandemic devastating international trade and disrupting global commerce, Vietnam's gross domestic product grew by 2.9% in 2020, the highest growth rate in Asia.

Its exports soared by 6.5% in terms of value in 2020, underpinned by sale of mobile parts, other electronics, and textiles. Meanwhile, its imports also grew by 3.6%.

In this persistent expansion, Ho Chi Minh City and its many terminals have been a key feature, especially in connecting Vietnam with neighbouring nations.

Ocean Network Express launched the first service from Shanghai to Ho Chi Minh, as part of a new connection between Japan and Vietnam, while RCL inaugurated a new feedership service linking Ho Chi Minh with the transshipment hub of Port Klang.

Unsurprisingly, Cat Lai, the feeder terminal run by Vietnam's largest port operator Saigon Newport Corporation, remained the dominant terminal, with a



Ho Chi Minh City: key in connecting Vietnam with neighbouring nations.

Saigon Newport Corporation

5.59m teu throughput, adding more than 300,000 teu from 2019.

With dozens of weekly routes to several Asian countries, the terminal has developed into a major regional hub.

Vietnam and Ho Chi Minh's growing importance has continued to be on display in 2021.

Maersk has opened two new distribution centres 25 km from Ho Chi Minh City in a sign of the carrier's assessment of the future prospects of the area as a trading base.

Port authority: Vietnam Seaports Association, 3 Nguyen Tat Thanh St, HCMC, Vietnam

Website: www.vpa.org.vn

Email: info@vpa.org.vn

Terminals (Operators):

Ben Nghe (BNP)

Binh Duong (Gemadept)

Dong Nai (Dong Nai Port Joint Stock Company)

Tan Cang Cat Lai (Saigon Newport Corporation)

Lotus (Lotus Joint-Venture Company)

Phuoc Long (Phuoc Long Port Company Limited)

Vietnam International Container Terminals,

VICT (First Logistics Development)

Saigon Premier Container

Terminals, SPCT (DP World)

Sai Gon Tang Cang Hiep Phuoc

(Saigon Newport Corporation)

SP ITC (ITC)

21 / New York/New Jersey (United States)

7 2

Throughput 2020: **7,585,819 teu**, **7 1.5%** (2019: 7,471,131 teu)

Port is able to 'handle the forecast import boom with relatively few delays'

THE Port of New York & New Jersey saw steep drop-offs in throughput during the first half of 2020, followed by an almost equally steep uptick in volume in the second half.

That was very much in line with other ports around the country, but NY&NJ had a different approach to the eventual surge.

"I think for NY&NJ, after the tremendous drop in volumes

April-July 2020, we have been able to handle the forecast import boom with relatively few delays to vessels, with very few needing to anchor for any amount of time," said John

Nardi, president of the New York Shipping Association.

“This, I believe, is due to the communication forums established in the port — such as the Council on Port Performance, where we constantly review challenges faced by all stakeholders and collectively solve them when we are able,” Mr Nardi said.

The CPP, which has been in place since 2014, brings together a cross-section of stakeholders with expertise in all areas of ocean transportation and logistics, including trucking and rail — volunteers who collaborate on achieving productive and efficient cargo movement for port customers.

May and June saw the sharpest throughput falls at -16.5%

and -16.3%, respectively, year over year.

The turnaround came in August, with 688,365 teu — a modest 1.3% increase over 2019.

That was followed by four months of rising figures, the highest coming in November, at 738,885 teu — an increase of 23.2% over 2019.

As the import boom across the US shows no signs of easing, marine terminals at the port plan to increase container-handling capacity and improve fluidity with new ship-to-shore cranes and yard equipment.

Not least, they want faster gates for trucks and improved dwell times by having shippers retrieve containers quickly.



New York & New Jersey: communication forums established in the port.

Port of New York & New Jersey

Port authority: Port Authority of NY & NJ, Four World Trade Center, 150 Greenwich Street, New York

Website: www.panynj.gov

Email: ponynjguide@panynj.gov

Terminals (Operators):

APMT (APM Terminals)

Maier Terminal (Maier Terminals LLC)

GCT New York (Global Container Terminals)

GCT Bayonne (Global Container Terminals)

Port Newark (Ports America)

Red Hook Container Terminal (Red Hook Container Terminal LLC)

22 / Laem Chabang (Thailand)

▼ 2

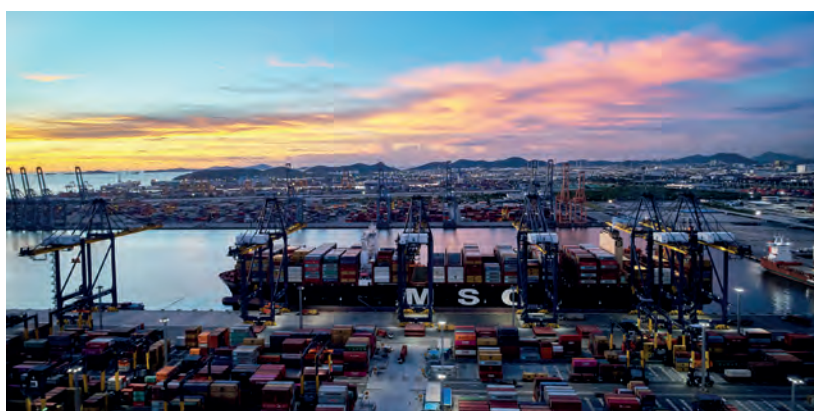
Throughput 2020: **7,546,500 teu**, ▼ **6.9%** (2019: 8,106,928 teu)

Thai port is still developing its sites to handle more cargoes and is investing in a range of projects

THAILAND'S economy contracted at its fastest pace since the Asian financial crisis more than two decades ago, with imports and exports falling by 12.4% and 6%, respectively, compared to the previous year.

The economy's downturn was reflected at the port of Laem Chabang, which saw box throughput dwindle by 6.9% year on year in 2020 to total 7.5m teu.

Volume growth is expected this year as the Thai National



Laem Chabang: key point of entry for Thailand's container traffic.

MSC

Shippers' Council remains upbeat about 6%-7% trade growth, helped by the global economic recovery, economic growth in major trading partners and healthy exports of industrial products.

These include automobiles, electrical appliances, equipment and parts, and oil-related products such as plastic pellets and chemicals.

Located at Chonburi province in the upper Gulf of Thailand, 130 km southeast of Bangkok, Laem Chabang port is the key point of entry for Thailand's container traffic.

Laem Chabang is still developing its sites to handle more cargoes and investing in a range of projects to remain competitive.

The third-phase development of the port, a key project in Thailand's Eastern Economic Corridor, is being built under public-private partnership deals.

The port is also going big on data in line with top global ports like Singapore.

Laem Chabang is expected to be equipped with operations management via digital solutions and a robot management system that will enable all-weather shipping.

The Thai government also has plans to build dry ports in border areas to load and store containers from neighbouring countries and China.

Port authority: Port Authority of Thailand, 444 Tarua Road, Klongtoey, Bangkok 10110 Thailand

Website: www.laemchabangport.com

Email: pr@laemchabangport.com / central@port.co.th / info@port.co.th

Terminals (Operators):

LCB Container Terminal 1 (APM Terminals)

LCMT Company (APM Terminals)

TIPS (TIPS Co)

Terminals B5 & C3 (Laem Chabang International Terminal Co)

Hutchison Laem Chabang Terminal/ Terminal A3 (Hutchison)

Eastern Sea Laem Chabang Terminal (ESCO)

Evergreen Container Terminal (Thailand)

23 / Tanjung Priok (Indonesia)



Throughput 2020: **6,870,400 teu**, **▲ 9.6%** (2019: 7,600,000 teu)

Indonesian port is undergoing major expansion to receive the new-generation containerships

THE port of Tanjung Priok, also known as the port of Jakarta, posted a 6.9m teu throughput in 2020, mainly due to the global economic uncertainties caused by the coronavirus pandemic.

Container throughput totals dropped by 9.6% from 7.6m teu a year before.

Non-container traffic also fell by 16.5% year on year to 50.1m tonnes, while the flow of ship visits decreased

by 14.7% compared to 2019, from 209.1m gt to 178.4m gt.

One of the busiest ports and the principal gateway to the Indonesian archipelago, Tanjung Priok handles around 50% of the country's transshipment traffic.

The port is currently undergoing major expansion to facilitate the entry of new-generation containerships with capacities above 10,000 teu.

The Kalibaru project, which began in 2013, is likely to be completed by 2022.

The expansion plan includes seven new terminals capable of handling 18m teu, of which only one terminal — New Priok Container Terminal One (NPCT1), with a capacity of 3m teu — has been inaugurated.

Indonesian state-owned port operator Pelindo II (IPC), which is responsible for the lion's share



Tanjung Priok: principal gateway to the Indonesian archipelago.

Pelindo II

of traffic in Tanjung Priok, is constructing the next phase of the Kalibaru project.

This includes the construction of New Priok Container Terminal Two (NPCT2) and New Priok Container Terminal Three (NPCT3), as well as areas for Product Terminal 1 (PT1) and Product Terminal 2 (PT2).

The additional development phase also includes a reclamation area and a breakwater covering a total of 178

hectares for NPCT2, NPCT3, PT1, PT2, as well as supporting areas.

Land access to Pelindo II's ports is largely through roads with limited rail connections.

As such, to ease port congestion, it is constructing an inland waterway and developing a 34 km three-lane toll road with partners to connect Tanjung Priok with its hinterland.

IPC is also developing a digital platform, i-Hub, for online booking of

all services, ranging from registration to requesting services at the port, payment and tracking of cargo at the port.

Port authority: Jl. Pasoso No.1, Tanjung Priok, Jakarta Utara, 14310

Website: www.indonesiaport.co.id

Email: info@indonesiaport.co.id

Terminals (Operators):

Jakarta International Container Terminal (Pelindo II)

New Priok Container Terminal One (NPCT1)

Koja Container Terminal (Hutchison Ports)

24 / Colombo (Sri Lanka)

NO CHANGE

Throughput 2020: **6,854,762 teu**, **↓ 5.2%** (2019: 7,228,337 teu)

Although volumes declined in 2020 owing to the pandemic, the port is continuing with its expansion plans

DESPITE maintaining operations through the pandemic, container throughput at Colombo dropped 5.2% last year versus 2019.

The biggest decline came from South Asia Gateway Terminal, which was impacted by pandemic measures such as import restrictions in the country, according to media reports.

The East Container Terminal, which started operations late last year, was said to have handled 40,000 teu, according to the reports, while a slight increase in volumes was seen at the Colombo International Container Terminal, a venture between China Merchants Holdings and the Sri Lanka Ports Authority.

All terminals, which were following strict health guidelines, had extended the demurrage-free period during the first wave of the pandemic at a vast cost.

The port, which lost about 15% in revenue, was now looking to regain lost business.

The Navis system used at Jaya Container Terminal and ECT has been upgraded to N4 to further enable efficient yard and ship planning and gate control, the port authority said.



Colombo: East Container Terminal, which started operations late last year, was said to have handled 40,000 teu.

Sri Lanka Ports Authority

It also said the Container Freight Station would be upgraded to provide warehousing facilities by January 2022.

Meanwhile the fifth phase of construction at the Jaya terminal started in December 2020 and was scheduled to be completed by July 2022.

Consultancy for the Jaya expansion project will be provided by the SLPA, while construction is being carried out by China Harbour Engineering.

Other expansion plans identified include a new West Container Terminal, with a deep draught of 20 m-22 m, aimed at increasing

handling capacity by 2.5m teu to 3m teu. Developments at ECT will also boost capacity by 2.5m teu.

Completion of the WCT works is pegged for 2024, with some operations beginning in 2023, while completion of the ECT works, which have been planned in various stages, is targeted by 2025.

There are plans to equip the new terminals with modern ultra large cranes and other state-of-the-art facilities and infrastructure, SLPA said, with improvements in technology.

A so-called Port Community System will be instrumental in

integrating all stakeholders and creating a one-stop mechanism for ease of business.

Meanwhile, Mediterranean Shipping Co announced the enhancement of its Indus service, with a new port call at Colombo to help customers in the US to import from India's east coast, according

to the SLPA website, citing a company notice.

"As a major international transshipment hub, the addition of Colombo will reinforce our offering for cargo shippers in southeast India, Sri Lanka and Bangladesh, and facilitate new business in these markets," according to the notice.

Port authority: Sri Lanka Ports Authority, 19 Chaithya Road, Colombo 01, Sri Lanka

Website: www.slpa.lk

Email: info@slpa.lk

Terminals (Operators):

Jaya Container Terminal (SLPA)

Unity Container Terminal (SLPA)

East Container Terminal (SLPA)

South Asia Gateway Terminal (SAGT)

Colombo International Container Terminal (China Merchants Holdings/SLPA)

25 / Tanger Med (Morocco)

↑ 10

Throughput 2020: **5,771,200 teu**, ↑ **20.2%** (2019: 4,801,713 teu)

From small beginnings, the port rapidly moves ahead to become the largest container facility in the Mediterranean

IN LESS than two decades, Tanger Med has gone from being an empty, isolated beach to become the largest port in the Mediterranean.

Having started to make serious inroads into the transshipment market from its initial launch in 2007, the port has since expanded significantly to encompass four container terminals, as well as dry and liquid bulk terminals, and a major ro-ro and ferry terminal for traffic across the Strait of Gibraltar.

Container activity at Tanger Med Port Complex topped 5.7m teu in 2020, up by one-fifth on the preceding year, even though it was not able to repeat the additional 1m teu it added in 2019.

Yet this was still enough to push it up 10 places in the rankings and to overtake Greece's Piraeus in the Mediterranean top slot, as well as leapfrogging Algeciras and Valencia in Spain.

Tanger Med suffered a 32% fall in total maritime traffic, largely caused by the pandemic-driven slump in passenger vessels calling.

However, the port received 4,306 non-passenger or ro-ro vessel calls in 2020, a growth of 10% over 2019. The size of vessels also increased, with 916 ships of more than 290 m loa berthing, an increase of 14%.



Tanger Med: TC3 terminal will have the capacity to add another 1.5m teu to the port's throughput.

Liebherr Group

"This performance demonstrates the sustained commitment and collaboration of all Tanger Med's partners, in particular concessionaires and shipowners, as well as the administrations and the authorities, who, despite an exceptional health context, remained fully mobilised to ensure the continuity of national and international supply chains under the best conditions," the port authority said.

Tanger Med's growth spurt is not over yet, however. On the first day of 2021, the new Tanger Alliance terminal, TC3, received its first vessel call.

TC3, located in the Tanger Med II development, has a quay length

of 800 m, depth alongside of 18 m and eight 25-row gantry cranes.

Once fully commissioned, the terminal — operated by a consortium of Contship Italia, Eurogate International, Hapag-Lloyd and local terminal operator Marsa Maroc — will have the capacity to add another 1.5m teu to Tanger Med's throughput.

Port authority: Tanger Med Port Authority, Zone Franche Ksar el-Majaz, Oued R'mel, BP 80 Tangiers, Morocco

Website: www.tangermed.ma

Email: m.fares@tangermed.ma

Terminals (Operators):

APM Terminals Tangier (APM Terminals)

Eurogate Tanger (Eurogate)

TC3 (Tanger Alliance)

26 / Mundra (India)

11

Throughput 2020: **5,656,594 teu**, **19.5%** (2019: 4,732,699 teu)

Indian port hits a new productivity milestone, overtaking its rival JNPT to become the nation's largest container terminal

MUNDRA port, located on the north shores of the Gulf of Kutch on the west coast of India, hit a new productivity milestone, ramping up competition and overtaking its rival Jawaharlal Nehru Port Trust to become the country's largest container port.

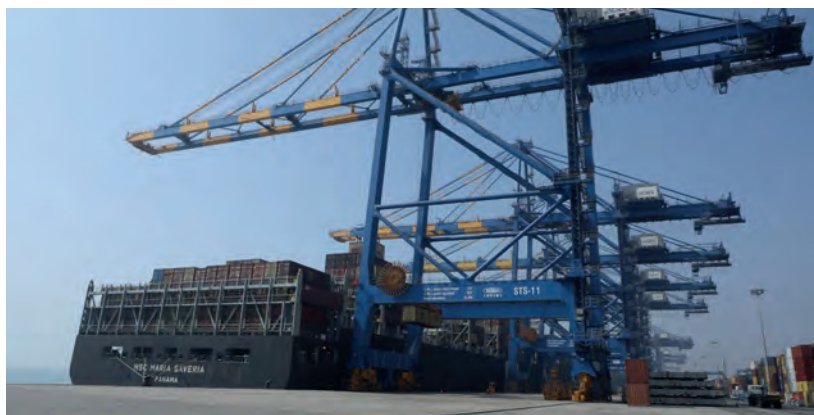
The coronavirus outbreak halted major operations across the Indian port industry amid lockdowns and shortage of manpower in 2020, prompting some to declare force majeure.

Yet this was a record-breaking year for Mundra, as container throughput jumped by 19.5% to hit more than 5.6m teu — placing it almost 1m teu ahead of JNPT, which has long been established as the premier container hub in the country.

The deepwater, all-weather port attributed its strong performance to the measures taken by the port authorities amid Covid-19.

These included service efficiency, strong hinterland links and partnerships with top global shipping lines through joint ventures, as well as the acquisition of container-handling ports like Ennore and Krishnapatnam.

Mundra greatly benefitted from the amendments in the General Purpose Wagon Investment



Mundra: attributed its strong performance to the measures taken by the port authorities amid Covid-19.

Adani Ports and SEZ

Scheme of Indian Railways, which has opened new doors of opportunity by enabling private players to transport restricted commodities through the port.

Mundra is the flagship port of Adani Ports and Special Economic Zone, India's biggest private port operator, controlled by top Indian businessman Guatam Adani and his son Karan Adani.

The port's location is ideal for growth as a major hub for cargo, connecting key maritime routes, which makes it a preferred gateway for cargo bound westwards.

Mundra has been designed to handle all types of cargo, including

containers, dry bulk, break bulk, liquid cargo and automobiles.

The port reported a healthy rise of 4% year on year in overall traffic, handling more than 140m tonnes of cargo in the 2020-2021 financial year.

Port authority: Adani Ports and SEZ Ltd. Navinal Island, Mundra, Kachchh, Gujarat, 370421, India

Website: www.adaniports.com

Email: housam.haddad@adani.com

Terminals (Operators):

Adani Container Terminal (Adani Ports)

Adani CMA Mundra Terminal (Adani Ports and CMA CGM)

Adani International Container Terminal (Adani Ports and MSC)

Adani Mundra Container Terminal (AMCT)

27 / Yingkou (China)

NO CHANGE

Throughput 2020: **5,650,000 teu**, **3.1%** (2019: 5,480,000 teu)

Consolidation comes up trumps for the northern China port as it overtakes its fellow regional hub of Dalian

THE prediction that Yingkou port's fortunes would improve after being taken into the China

Merchants Port-controlled Liaoning Port Group proved to be outstandingly accurate.

The port not only recovered from a slump the year before but also outperformed and overtook its

fellow northern regional hub Dalian in the Lloyd's List Top 100 rankings for 2020.

A 3.1% rise in throughput to more than 5.6m teu was enough to keep Yingkou at 27th position, while Dalian's plunge in volumes kicked it out of the top 20, right down to 32nd place.

The group's policy of shifting domestic traffic to Yingkou and China's national dual-circulation policy of encouraging internal consumption have combined to brighten the port's prospects, while management has astutely taken advantage of the trend shifts to boost business.

Yingkou is also making use of its ability to take in fifth-generation container vessels to keep building its international route connections, although this role seems to have been designated to Dalian.

Where the port has really made inroads, however, has been in the domestic sector, where it has taken advantage of its own domestic trade routes and fed on China Merchants Port's network, especially to the southern and southeastern coast ports, with the latter's north-south interaction policy.

As at the end of the first quarter of 2021, Yingkou port is



Yingkou: made major inroads in the domestic sector.

Reuters/Alamy Stock Photo

accounting for about 70% of the domestic trade market share in northeast China.

At least seven domestic routes have been added during the year by most of the major local lines.

These includes routes into key hub regional hubs, as well as into the Yangtze River Delta network, such as Shanghai, Taicang, Humen, Rizhao, as well as Xiamen, Shantou and Quanzhou.

In addition, latching onto another broader national initiative to containerise more cargo types, Yingkou port has tied up with China Grain Logistics, part of one of the biggest domestic lines, to streamline the grain supply chain.

Meanwhile, the transport of steel and other commodities is also being shifted to containers as China tries to improve its logistics channels to boost efficiency and lower cost.

With little likelihood of international trade increasing in the niche northeastern market for which Dalian serves as a hub, it seems Yingkou has come up trumps from the consolidation exercise.

Port authority: Yingkou Port Authority, Penavico Bldg, 1 New Port Rd, Bayuquan Dist Yingkou, Liaoning, Prov 115007, China

Website: www.liaoningport.com

Email: lichengliang@126.com

Terminal (Operator): Yingkou Container Terminal (Liaoning Port Group)

28 / Piraeus (Greece)

▲ 2

Throughput 2020: **5,437,477 teu**, ▲ **3.7%** (2019: 5,648,056 teu)

Greek port sees its first throughput decline since 2015 amid the coronavirus pandemic

AFTER four years of unbridled growth, the port of Piraeus suffered a decline in throughput due to the coronavirus pandemic.

Overall throughput dropped by 3.7% last year, largely on account of the decline in Pier 2 and Pier 3.

These terminals, which are run by Cosco Shipping Ports-owned Piraeus Container Terminal, saw throughput fall by 5.1% to less than 4.9m teu.

Cosco Shipping Ports has attributed that fall to the pandemic.

However, Pier 1, the smaller terminal operated by the Piraeus Port Authority, saw a 10.5% increase in throughput, due to a boost in transshipment business that came mainly thanks to a relevant agreement with PCT.

Despite the drop in 2020, Piraeus remains the largest European

port in the Mediterranean and will continue to be a strategic interlocutor between Europe, Asia and Africa.

Cosco Shipping Line recently added Piraeus to its service connecting US and Asian ports, with two weekly stops from ships capable of carrying 10,000 boxes each. The Greek port is the only European one in that service.

In 2021, the PPA also made investments in five new stacking cranes, other equipment and operation modernisation efforts, including cranes that can service vessels of up to 20,000 teu.

It said these moves will boost Pier I's capacity by 30% to 1.3m teu per year.

Longer term, with the current investment plan to expand the port's capacity to handle 10m teu, Piraeus looks set to remain a key fixture in the region.

Port authority: Piraeus Port Authority SA, 10, Akti Miaouli str., 18538 Piraeus, Greece

Website: www.olp.gr

Email: commercial@olp.gr

Terminals (Operators):

Pier II & III: Piraeus Container Terminal (PCT)

Pier I: Piraeus Port Authority (PPA)



Piraeus: remains the largest European port in the Mediterranean.

Piraeus Port Authority

29 / Valencia (Spain)



Throughput 2020: **5,428,307 teu**, **▼ 0.2%** (2019: 5,439,827 teu)

Spain's top container port shows resilience in maintaining volumes through the worst of the pandemic

VALENCIA managed to limit its loss of box business to just 11,520 teu in 2020 compared to 2019 — a remarkable feat, given the disruption across the industry.

Yet it was not enough to retake the Mediterranean crown from Piraeus, which just managed to cling onto to its status as southern Europe's biggest container hub for a

second consecutive year, despite a dip in throughput.

Nevertheless, double-digit growth in box throughput at Valencia since August 2020, when the worst of the pandemic restrictions lifted, have seen Valencia's recovery accelerate to the point that it was handling one out of every three boxes in Spain last year.

The port's growth plans also remain undiminished in the wake of Covid-19.

The €1.4bn (\$1.66bn) development of the new northern container terminal by MSC subsidiary Terminal Investment Ltd will ultimately give Valencia a capacity of 12.5m teu when it completes in 2024.



Valencia: handled one out of every three boxes in Spain last year.

Port Authority of Valencia



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Under the current investment plan published by its rival Piraeus, the Greek port's container terminal will only offer 10m teu.

The Port Authority of Valencia's spending plans to 2024 total €822m — €552m of which is linked to new projects, while €227m is pinned to developments already under way but not yet complete.

The programme includes an overhaul of its rail network and

energy efficiency upgrades, featuring new alternative energy generation systems, such as wind power and solar.

According to the Port Liner Shipping Connectivity Index, which measures connectivity between leading ports as assessed by the United Nations Conference on Trade and Development (UNCTAD), Valencia remains Spain's best-connected port and is now Europe's

fourth-most connected, having overtaken Bremen, Le Havre and Piraeus during 2020.

Port authority: Autoridad Portuaria de Valencia, Avda, Muelle del Turia s/n 46024, Valencia, Spain

Website: www.valenciaport.com

Email: comercial@valenciaport.com

Terminals (Operators):

CSP Iberian Valencia Terminal (Cosco Shipping Ports)

MSC Terminal Valencia (Terminal Investments Ltd)

TCV Multipurpose Terminal (APM Terminals)

30 / Taicang (China)

NO CHANGE

Throughput 2020: **5,212,000 teu**, **↑ 1.2%** (2019: 5,152,000 teu)

The key transshipment hub on the Yangtze River appears undaunted by the pandemic and geopolitical uncertainties

TAICANG container throughput contracted more than 10% year on year for first six months of 2020 — so the full-year 1.2% growth indicates there was a quick recovery in the second half.

The performance of the transshipment hub on the Yangtze River, a key artery for China's economy, has also reflected the country's strong rebound in domestic trade and exports after the initial hit from the coronavirus outbreak.

Shanghai, home to the world's busiest container port, sees Taicang in the nearby Jiangsu province as a major feeder port.

Taicang Zhenghe International Container Terminals, a joint venture between Shanghai International Port Group and Taicang Port Group, handles about one-quarter of the port's box volume.

The terminal expects to bring the phase four expansion project into operation in July. This will add five new berths, with 2m teu annual handling capacity, to the existing facility.

Taicang will also put into use a new railway linking its container terminals to the train stations in



Taicang: Jiangsu province port is seen as a major feeder port by Shanghai.

Taicang Port Group

other main cities in the province, as well as Shanghai, to reduce port congestion and increase its intermodal transport capacity.

Other efforts to gain more cargo and enhance its hub role include expanding the port's industry park and logistics facilities.

Sportswear giant Skechers, for example, has established a \$360m distribution centre inside the port area.

The company also plans to locate its Asia Pacific headquarters in Taicang to better serve its clients in China and Southeast Asia, according to local media reports.

Both the pandemic and geopolitical uncertainties appear unable to shake Taicang's confidence.

Local government envisages 10m teu in box throughput by 2025 and 15m teu by 2035.

For the first four months of 2021, Taicang handled more than 2m teu, up 44.5% from the year-ago period.

Port authority: Jiangsu Taicang Port Administration Committee, 8 Beihuan Rd, Taicang Port Development Area, Jiangsu Province, China

Website: www.tcport.gov.cn

Email: gwjt@tcportgroup.com

Terminals (Operators):

Taicang International Container Terminals (Ningbo-Zhoushan Port Group, Cosco Shipping Ports and Suzhou Port Group)

Suzhou International Container Terminals (Ningbo-Zhoushan Port Group and Taicang Port Group)

Taicang Zhenghe International Container Terminals (Shanghai International Port Group and Taicang Port Group)

Taicang Port Zhenghe Xinggang Container Terminals (Taicang Port Group)

31 / Hai Phong (Vietnam)

↗ NO CHANGE

Throughput 2020: **5,142,300 teu**, ↗ **0.2%** (2019: 5,133,150 teu)

Northern Vietnamese port maintains a strong position and is set for expanding deepsea services

IN A very challenging year, the port of Hai Phong held firm and is poised for further growth.

The port may have handled just over 9,000 teu more compared to 2019, but its links between inland northern Vietnam, its distribution centres and international trade, as well as future investment plans, indicate that it will expand in size and significance in the years to come.

With a deepsea terminal handling ultra large vessels and many smaller terminals contributing to traffic and feedership movement, Haiphong, which has benefitted from exporting business relocations from China, is attracting further attention from the big players.

The Haiphong International Container Terminal, the Saigon Newport Corporation-controlled deepsea terminal that began

operating in mid-2018, grew further as the facilitator for exports and imports for the region.

Among its operational highlights was adding another transpacific service to the US west coast in 2020. The port handles vessels from all the major carriers.

In May 2021, Haiphong Port Joint Stock Company began work on two new terminals at Lach Huyen, with the expectation that it will be completed sometime in 2024.

The Vietnamese government also expanded approval for the construction of another two new container terminals at Lach Huyen by the end of this decade.



Hai Phong: benefitted from exporting business relocations from China.

Port of Hai Phong Joint Stock Company

Port authority: Vietnam Seaports Association, 3 Nguyen Tat Thanh St, HCMC, Vietnam

Website: www.vpa.org.vn

Email: info@vpa.org.vn

Terminals (Operators):

Hai Phong: Chua Ve & Tan VU (VinaLines)
Haiphong International Container Terminal/
Lach Huyen (Saigon Newport Corp)
Dinh Vu (Dinh Vu Port Joint Stock Co)
Nam Hai Dinh Vu (Gemadept)
Nam Dinh Vu (Gemadept)
PTSC Dinh Vu (Viconship)
Green Port (Viconship)

32 / Dalian (China)

↘ 13

Throughput 2020: **5,110,000 teu**, ↘ **41.7%** (2019: 8,760,000 teu)

Northern Chinese port sees the most drastic annual drop in throughput in the top 100, plus the largest annual decline on record in China

THE port of Dalian has the dubious honour of recording 2020's most drastic annual drop in throughput among Lloyd's List's Top 100 Container Ports, as well as the largest annual decline on record in China.

The downtrend of the past few years accelerated from a 10% decline in volumes in 2019 to a

full-blown rout in 2020, which saw the north China hub posting a 41.7% drop in throughput.

As a consequence, it fell from being one of the top 20 ports to 32nd position, sliding past a fellow port in the recently consolidated Liaoning Port Group, Yingkou, in the process.

Already hit by weak trade conditions from the year before, Covid-19-induced disruptions and shifts in trade patterns and cargo types, as well as the group's strategy of transferring volumes to Yingkou, combined to swipe more than 3m teu off Dalian's tally.

Dalian has been trying hard to boost business, building up its cold chain facilities in an effort to become a fruits and frozen goods hub for the north China region.

It has also continued efforts to boost intermodal connections to rail and increase its international and domestic services.

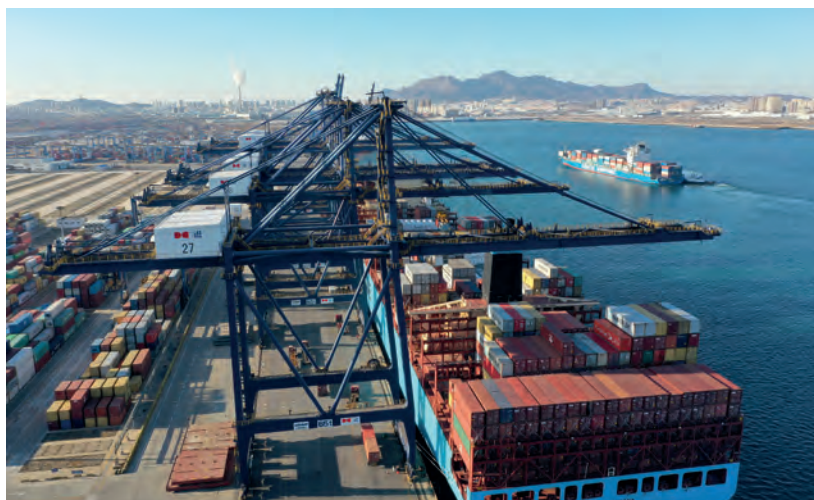
In June 2020, it opened a bonded warehouse for meat products, trying to promote itself as a frozen meat distribution centre for north China.

However, this backfired when a Covid-19 outbreak towards the end of the year — ostensibly from Russian frozen fish products — caused authorities to close the port to Russian vessels and affected volumes.

In terms of new routes, the port added eight international services, mainly to northeast and Southeast Asian ports. This includes a new MSC dedicated Far East service covering Russian Far East ports as well as South Korea.

Other carriers are also trying out routes to connect Dalian to new Southeast Asian markets such as central Vietnam — an increasingly popular investment destination for Chinese companies.

This adds to established routes by seasoned intra-Asia players such



Dalian: has suffered while fellow port Yingkou seems to have benefitted.

PSA

as CMA CGM and SITC to Southeast Asian hubs such as Singapore and Malaysia.

Ultimately, however, Dalian's fortunes will depend on the plans that its parent group's controlling shareholder, China Merchants Group, has for it.

Recent moves seem to suggest that Yingkou has been designated as the region's main domestic container terminal, while Dalian maintains its position as the northern hub for international container trade.

As a result of China's latest dual-circulation policy placing

equal emphasis on the domestic economy, Yingkou seems to have benefitted while Dalian has suffered the worst effects of weak global trade conditions in 2020.

What the future holds for it will be as much a function of domestic policy as global economic conditions.

Port authority: Dalian Port Bureau, No.2 Gangwan Plaza, Zhongshan District, Dalian, Liaoning Sheng Province, PRC

Website: www.liaoningport.com/html/en/index.html

Email: songhui@7856.com.cn

Terminal (Operators):

Dalian Container Terminal (Dalian Port Group, PSA, Cosco Shipping, NYK)

33 / Algeciras (Spain)

1

Throughput 2020: **5,107,873 teu**, **▲ 0.3%** (2019: 5,125,385 teu)

Sale of terminal stake should see a boost in volumes that were already beginning to bounce back at the end of 2020

AFTER a strong start to 2020, which saw volumes rise by more than 10% year on year in both January and February, the onset of the pandemic began to be felt in Algeciras in March, when growth slipped to less than 2%.

By May, this turned into a 13.5% decline in throughput on the year before, as the full

impact of lockdowns in Europe were felt.

A return to positive numbers in the fourth quarter meant the port complex ended the year with just a slight dip of 0.3% on the full-year 2019 figures, handling 5.1m teu.

Despite its prime location in the Strait of Gibraltar, Algeciras has not managed to see off

competition from Valencia as a gateway for Spanish imports, nor from Tanger Med, just 20 miles away to the south, for transshipment volumes.

The port's two terminals can both handle the largest boxships. The 23,100 teu *CMA CGM Jacques Saadé* made its maiden call to the Total Terminals International

Algeciras terminal, while the 23,756 teu *MSC Gülsün* called at APMT Algeciras on its first stopover in Europe.

Expansion work was begun last year at Juan Carlos Quay, where APMT Algeciras is located, extending the draught to the 18.5 m required to accommodate fully laden ultra large containerships.

TTIA is set to receive another boost this year, following the acquisition of a 50% minus one share stake in the terminal by CMA CGM's terminal unit.

The terminal was bought by HMM following the collapse of original owner Hanjin Shipping, but HMM had been looking for an investor to inject liquidity in a facility that has



Algeciras: faces competition from Valencia as a gateway for Spanish imports.

philipus/Alamy Stock Photo

been slowly haemorrhaging money since its takeover.

It is hoped that the promise of additional volumes will help TTIA expand to its 1.7m teu a year capacity, which would also help boost the total throughput of the port.

Port authority: Autoridad Portuaria de la Bahía de Algeciras, Paseo de la Conferencia s/n, Apartado 7, E-11207, Algeciras, Spain

Website: www.portofalgeciras.com

Email: comercial@apba.es

Terminals (Operators):

APM Terminals Algeciras (APMT)

Total Terminal International

Algeciras (HMM/CMA CGM)

34 / Rizhao (China)

▲ 6

Throughput 2020: **4,860,000 teu**, ▲ 8% (2019: 4,500,000 teu)

The increasingly important port on the Shandong coast edges closer to 5m teu per year

MUCH like the other ports in the Shandong Port Group, Rizhao has done well during a tough Covid-19-ravaged year.

It further improved its throughput by a healthy 8% to edge the increasingly important port on

the Shandong coast closer to the 5m teu-per-year range of ports.

In the process, Rizhao leapfrogged six places in the rankings, to 34th position.

With an eye firmly on its target of reaching 5.5m teu in throughput

by 2025, the port has started to develop itself as a logistics centre, while also building on its strengths within the domestic and international route networks.

In August, the port and Linyi City, a major logistics centre just inland of Rizhao, agreed to co-operate on port and industrial city integration.

The city's Linyi Lingang Economic Development Zone is a key part of China's New Eurasian Continental Bridge project, which provides rail connections to Europe.

Prior to this, in May, construction began on the Lingang-Shugang Railway, which will provide a direct rail link from Linyi to Rizhao Port and pave the way for the industrial park's businesses to make use of the port for their exports.

Rizhao port, meanwhile, continues to expand its domestic and international services, adding almost 20 routes in 2020. These include four international feeder



Rizhao: started to develop itself as a logistics centre.

View Stock/Alamy Stock Photo

routes into Qingdao, four direct services to Southeast Asia by compatriot lines Cosco Shipping and SITC and 10 domestic trade routes.

Rizhao's domestic network has risen to 160 services per month and now includes burgeoning growth centres in the south, such as Xiamen and Qinzhou.

Domestic carriers such as Zhonggu, Antong and Tradewind FAX, as well as Cosco Shipping, have upgraded some of these to daily services.

The group also continues to invest in future infrastructure, including big distribution and bonded logistics centre projects and a multimodal integrated logistics park in collaboration with major domestic line Zhonggu Shipping.

Meanwhile, the port's investments in automation continue apace, with the second phase of its automated container yard project becoming fully operational and achieving an efficiency rate four times that of traditional gantry cranes.

The next phase will see the installation of remote-controlled quay cranes and unmanned trucks. The third phase will also see increasing use of 5G technology as the port moves towards fully automated terminal solutions.

Rizhao port reacted quickly and decisively during the Covid-19 crisis by being among the first to cut fees to help its customers while also actively taking in reefers and empties that were squeezed out of other ports.

It also worked with Cosco Shipping to launch a special booking service to assist exporters and stabilise the supply chain.

As Chinese industries and supply chains evolve, there will be winners and losers among the ports that service them.

Shandong Port Group seems to be among the better managed of China's newly consolidated ports and Rizhao and its fellow container terminals within the group are benefitting from that.

Port authority: Rizhao Port and Shipping Administrative Bureau, No. 369, Jining Road, Rizhao City, Shandong

Website: www.rzport.com

Email: rzpcl@rzport.com

Terminals (Operators):

Berths 1, 2, 3 and 4 (Rizhao Container Terminal Development Co)

35 / Lianyungang (China)



Throughput 2020: **4,800,000 teu**, **↑ 0.4%** (2019: 4,780,000 teu)

The largest seaport in China's Jiangsu province is facing fierce competition

LIANYUNGANG has suffered a stagnation in box throughput for three consecutive years.

Last year's growth was only 0.4%. In addition to the coronavirus fallout, the largest seaport in China's Jiangsu province is also facing fierce competition from other nearby ports.

Its largest rival Rizhao, for example, recorded an 8% increase in volume to 4.9m teu in 2020.

As transshipment port for the Yangtze Delta Region, most cargo handled by Lianyungang is from domestic trade and hence has limited its ability to develop deepsea routes.

However, the railway connectivity developed in the region has enabled it to quickly expand its intermodal services, viewed by the local government as a key part of its strategy that will help the port hit its 10m teu throughput target.



Lianyungang: most cargo handled is from domestic trade and limits its ability to develop deepsea routes.

Cynthia Lee/Alamy Stock Photo

In 2020, Lianyungang's sea-rail shipping volume topped 628,000 teu, up 63% year on year.

Through such services via Lianyungang, products can be hauled from Xi'an in west China to Guangzhou in the southern part of the country, or from Southeast Asia to countries in Central Asia, such as Uzbekistan.

Nevertheless, the volume growth slowed to 7.2% in the first quarter of this year due to congestion with China-Europe

rail freight and competition from neighbouring ports.

Exploring new product markets has therefore become increasingly important.

In May, the vessel *Fan Zhou 6* unloaded a shipment of ISO tanks containing liquefied natural gas, supplied by Tiger Gas, at Lianyungang's New Oriental Container Terminal.

It was the first such type of containership that Lianyungang had handled, but

the port expects more to come in future.

For the first five months of 2021, Lianyungang's box throughput climbed 4.5% to 2.1m teu.

Port authority: Lianyungang Port Authority, Shipping Centre, 209 Haitang Nouth Rd, Lianyu District, China

Website: www.lygport.com.cn

Terminals (Operators):

New Oriental Container Terminal Co Ltd (Cosco Shipping Ports/Jiangsu Lianyungang Port)
LYG-PSA Container Terminal (LPCT)
(PSA/Jiangsu Lianyungang Port)

36 / Bremen/Bremerhaven (Germany)

2

Throughput 2020: **4,767,000 teu**, **1.9%** (2019: 4,856,900 teu)

Politicians are still discussing how to bounce back after the loss of key customer Hapag-Lloyd

BREMENPORTS — or at least the container side of things at what is a full-spectrum port cluster, handling many types of cargo — is still suffering the consequences of Hapag-Lloyd's 2019 decision to switch US services to nearby Hamburg.

That move cost Bremen and Bremerhaven nearly 600,000 boxes in the year in question, and it lost a further 90,000 in 2020.

However, the fightback will be hard, given the cut-throat competition found elsewhere in the north continent range — even from post-Brexit UK ports on the other side of the North Sea.

The Covid-19 pandemic did not help, either. "The lockdown of entire national economies disrupted global supply chains, and even though world trade began to recover as from the summer of 2020, it was still not possible to offset the cargo losses sustained during the first six months," regional government-owned Bremenports said on its website.

Nevertheless, the twin ports retain strong support from



Bremen/Bremerhaven: twin ports retain strong support from the Bremen authorities.

Eurogate

the Bremen authorities, who have invested heavily in both automation and infrastructure, particularly rail, in recent years.

Earlier in 2021, the state parliament launched a dialogue on their future, including moves to bolster competitiveness. Input is being taken from local port businesses and trade associations, but no political

decisions are expected before summer 2022.

Port authority: Bremenports GmbH & Co. KG, Am Strom 2, 27568 Bremerhaven, Germany

Email: office@bremenports.de

Website: www.bremenports.de

Terminals (Operators):

Eurogate Container Terminal (Eurogate)
North Sea Terminal Bremerhaven
(APM Terminals and Eurogate)
MSC Gate (Terminal Investment Ltd and Eurogate)

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37 / Jeddah (Saudi Arabia)

▲ 4

Throughput 2020: **4,737,313 teu**, ▲ 6.8% (2019: 4,433,991 teu)

Saudi hub stays true to form, posting another strong annual volume performance, while much-needed expansion is on the horizon

JEDDAH, Saudi Arabia's largest container facility, reported consecutive years of growth in the high single digits in 2020, as volumes climbed to 4.7m teu.

Growth of 6.8% was also the highest among the other Saudi ports in the rankings — namely Dammam and King Abdullah — which both posted respectable gains over the 12-month period.

Jeddah's volumes were boosted by a string of new services, which helped offset Covid-19-induced trade headwinds.

This included the latest venture by the Saudi Ports Authority, or Mawani, which last year launched a direct connection between Jebel Ali in Dubai and Egypt's Sokhna Port, via Jeddah.

Successive years of volume growth is a major plus for the port, but the fact that Jeddah has finally looked to address its longstanding issue of undercapacity will be the most welcome move.

Last year, Red Sea Gateway Terminal took full control of Jeddah's former North Container Terminal, previously owned by Gulf Stevedoring and Contracting Co, merging it with its existing facility.



Jeddah: volumes were boosted by a string of new services.

RSGT

RSGT has pledged to invest \$1.7bn into its newly expanded terminal through to 2050, as part of a 30-year concession with Mawani. As a result, capacity at RSGT will be enhanced to as much as 9m teu come the middle of the century.

This came after DP World agreed a similar 30-year extension for its lease at the Jeddah South Container Terminal in 2019, with the promise of \$500m investment to increase capacity from its current 2.4m teu to 3.6m teu.

Further good news for the port came in July this year after confirmation that Cosco Shipping Ports, the port arm of state conglomerate China Cosco Shipping Corp, had completed a \$140m deal to secure a 20% share in RSGT.

Naturally, one would expect Cosco to drive further traffic through its affiliated Red Sea terminal, but it will also assist with the upgrade and increase of berth capacity while modernising the terminal yard and other supporting facilities.

CS Ports said the new infrastructure and facilities will “firmly establish RSGT as the largest logistics gateway, and the busiest container terminal in Saudi Arabia and on the Red Sea”.

Port authority: Jeddah Islamic Port, PO Box 9285, Jeddah 21188, Saudi Arabia

Website: www.ports.gov.sa/English/SAPorts/Jeddah

Email: pr-jip@ports.gov.sa

Terminals (Operators):

Red Sea Gateway Terminal (RSGT)

Jeddah South Container Terminal (DP World)

38 / Savannah (United States)

↔ NO CHANGE

Throughput 2020: **4,682,249 teu**, ▲ 1.8% (2019: 4,599,177 teu)

US east coast port experiences a momentous decline during the first half, but sees volumes rise in the second half

IN September 2020, the Port of Savannah welcomed the 2020-built, 15,128 teu *CMA CGM Brazil*, then the largest ship to call the US east coast. Georgia Ports

Authority executive director Griff Lynch heralded the arrival.

“Frankly, we weren’t expecting to experience record volumes during this pandemic,” Mr Lynch said.

He attributed the arrival of the megaship to work undertaken by the port: “It is clear our efforts to expand capacity and reach are taking hold.”

Savannah experienced a momentous decline in throughput during the first half of 2020, only to see volumes rise in the second half.

Things began to improve in August and the next four months all saw rising throughput.

“The longer-term trend of Savannah’s increasing market share is the result of the port’s fundamental strengths: a central location, more space and transformative infrastructure investment, both on- and off-terminal, to accommodate growth,” Mr Lynch said.

Among other developments, the US Army Corps of Engineers is expected to deliver a deeper Savannah harbour by the end of 2021, allowing vessels up to 16,000 teu to transit the Savannah River, with greater scheduling flexibility and heavier loads.

Savannah will also commission the second set of nine new working



Savannah: the US Army Corps of Engineers is expected to deliver a deeper harbour by end-2021.

Port of Savannah

tracks for its Mason Mega Rail project in 2021, growing its total to 18 and doubling GPA’s rail lift capacity to 2m teu a year.

The GPA board has approved \$305m for two new infrastructure projects that will add 1.4m teu of annual capacity at Garden City Terminal.

Not least, the port will add a transloading facility on a 90-acre parcel just upriver from the terminal.

A cross-docking warehouse will be completed by the summer of 2022, served by a yard with nine rubber-tyred gantry cranes and an annual capacity of 400,000 teu.

Port authority: Georgia Ports Authority, 2 Main St, Garden City, GA 31408

Website: www.gaports.com

Email: csv@gaports.com

Terminals (Operators):

Garden City Terminal (Georgia Ports Authority)
Ocean Terminal (Georgia Ports Authority)

39 / Jawaharlal Nehru (India)

6

Throughput 2020: **4,470,000 teu**, **↓12.4%** (2019: 5,100,891 teu)

Heightened pandemic-related restrictions have a negative impact on trade, with volume growth dropping off sharply from the previous year

THE pandemic struck a big blow at Jawaharlal Nehru port, which handled fewer containers and a lower volume of containerised cargoes in tonnage terms as its imports and exports shrank.

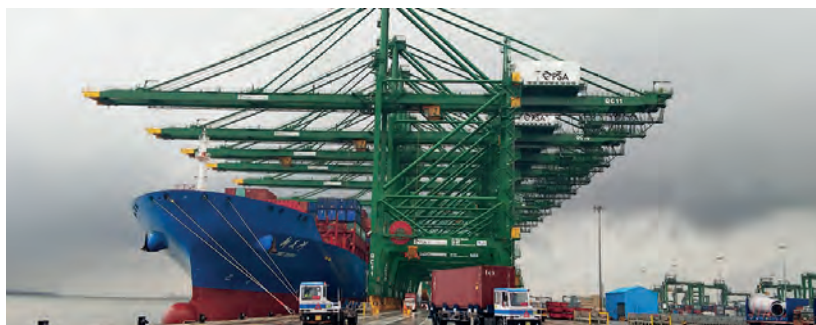
This situation arose following the heightened restrictions imposed to contain the coronavirus outbreak in India, which significantly affected the functioning of commerce and

industries during the second and third quarter of the year.

JNPT’s full-year container throughput for 2020 was down by 12.4% to less than 4.5m teu as port traffic registered a decline of 21.7% during the period from April to September last year.

Many efforts — including the launching of the new Centralised Parking Plaza and JNPT-Special Economic Zone (SEZ) and the further development of intermodal transport — could be attributed to the somewhat satisfactory performance of the port amid the virus situation.

Last year, the port trust developed the multi-product



Jawaharlal Nehru: port trust has developed the multi-product SEZ, the first of its kind.

PSA Mumbai

SEZ — the first of its kind — in its owned freehold land of 277 hectares at Navi Mumbai, with the objective of boosting exports by enabling port-led industrialisation under the Sagarmala initiative of the Ministry of Shipping.

“Over the past couple of months, we have been continuously working towards the successful operationality of the SEZ,” the port authority told Lloyds List.

Also, in continuation of the JNPT SEZ, Hindustan Infralog Private Limited — a joint venture between DP World and NIIF — has announced an investment of \$137m to develop the Nhava Sheva Business Park, a free trade warehousing zone situated at JNPT.

The project will be completed by the end of 2021 and will provide a seamless experience for both domestic and international traders, the port authority claimed.

“To address the growing demand of the exim trade, JNPT is constantly upgrading its capabilities to offer cost-effective integrated logistics solutions, through infrastructure expansion plans and implementation of several ‘ease of doing business’ initiatives,” it added.

Other initiatives include developing dry ports in the hinterland of Maharashtra at Jalna, Wardha and Nasik, based on a hub-and-spoke model for cargo clearance

and aggregation, extending hinterland connectivity.

The state-owned port also completed building a dedicated berth for coastal shipping last year, which will decongest rail and road networks, as well as ensuring a cost-competitive and effective multi-modal transportation solution.

Port authority: Jawaharlal Nehru Port Trust, Sheva, Navi Mumbai, Maharashtra 400702, India

Website: www.jnport.gov.in

Email: manair@jnport.gov.in

Terminals (Operators):

Jawaharlal Nehru Port Container Terminal (JNPCT)

Nhava Sheva International Container Terminal (NSICT/DP World)

Gateway Terminals India (GTIPL Terminals)

Bharat Mumbai Container Terminals (PSA)

Nhava Sheva International Gateway Terminal (NSIGT)

40 / Colón (Panama)

▲ 2

Throughput 2020: **4,454,902 teu**, ▲ 1.7% (2019: 4,379,477 teu)

Panamanian port retains its position as top dog in Central and South America, but there are mixed fortunes for its trio of terminals

PANAMA'S Colón held onto its crown as the largest container port in the Central and South America region off the back of 1.7% jump in throughput for 2020.

Colón is located on the Atlantic side of the Panama Canal, making it ideal for transshipment cargoes — whether heading to the US east coast from China, to and from Europe or South American trades.

The Colón Free Trade Zone is also growing rapidly, with an increasing Chinese influence, as the nation's go-to hub for the Central American market.

The Colón port complex has three main terminals: Manzanillo International Terminal — not to be confused with the Mexican port of the same name — Cristobal and Colón Container Terminal.

MIT, the largest of the port's terminals, reported record throughput numbers for 2020, up 4.7% year on year, in what was a

fruitful 12 months for transshipment trade, according to the port's operator, Seattle-based SSA Marine.

Meanwhile, Cristobal, operated by Hutchison Port subsidiary Panama Ports Co, saw volumes grow 2.4%.

Indeed, only the Colón Container Terminal, part of Taiwanese carrier Evergreen's port portfolio, witnessed a drop in traffic in 2020.

CCT is heavily reliant on localised trade rather than the major east-west transits making use of the Panama Canal.

The initial spread of coronavirus throughout South and Central America brought major disruption to trade in the region, also forcing the closure of the Colón Free Trade Zone for a significant period in the first half of 2020.

However, traffic at CCT has rebounded in early 2021, up nearly 20% through the first five months, according to Panama Maritime Authority statistics.



Colón: location on the Atlantic side of the Panama Canal makes it ideal for transshipment cargoes.

MIT

Port authority: Panama Maritime Authority

Website: www.amp.gob.pa

Email: ampadmon@amp.gob.pa

Terminals (Operators):

Manzanillo International Terminal (SSA Marine)

Colón Container Terminal (Evergreen)

Cristobal (Panama Ports Co)

41 / Manila (Philippines)

12

Throughput 2020: **4,442,921 teu**, **16.4%** (2019: 5,315,558 teu)

Port's largest terminal manages a berth expansion project, despite a hefty fall in throughput on account of Covid-19

MANILA is home base to International Container Terminal Shipping Inc, the largest multinational company in the Philippines, which operates ports and terminals in Asia, Europe, the Americas, the Middle East and Africa.

The port and its component parts took something of a hit from the pandemic, with overall throughput down by more than 16%.

At ICTSI's Manila International Container Terminal facility, the number of containers handled fell from 2,463,289 teu in 2019 to 2,088,820 teu in 2020.

Nevertheless, MICT did pull off a berth expansion project, adding another 150 m to berth seven, according to local media reports.

That created a 600 m contiguous berth, to accommodate boxships of more than 8,000 teu. It has also



Manila: MICT added another 150 metres to berth seven.

ICTSI

added 5.5 hectares to its container yard.

MICT's stated intent, as of the start of this year, was to acquire another eight rubber-tyred gantries to the 32 hybrid RTGs it has bought since 2018, and to replace an obsolete quay crane with three new quay cranes capable of servicing

vessels of more than 12,500 teu.

Berths one to five and their back-up areas will be refurbished, with the installation of an additional 450 reefer plugs for 40 ft containers.

Manila is also home to Manila North Harbour terminal, operated by its namesake, Manila North Harbour Port, in which ICTSI grew its longstanding stake to a 50% share in 2019.

Another Manila terminal, at its south harbour, is operated by Asian Terminals.

Port authority: Philippine Ports Authority, Bonifacio Drive, South Harbour Port Area, Manila, 1018 Philippines

Website: www.ppa.gov.ph

Email: rtsan@ppa.com.ph

Terminals (Operators):

Manila International Container Terminal (ICTSI)
Manila South Harbour (Asian Terminals, Inc)
Manila North Harbour (Manila North Harbour Port, Inc)

42 / Cai Mep (Vietnam)

6

Throughput 2020: **4,411,799 teu**, **17.9%** (2019: 3,742,384 teu)

Vietnamese port stays resilient amid the pandemic and is set for more growth ahead

IT MAY have been a very difficult year for the global economy, but in 2020, the port of Cai Mep recorded a huge performance.

Like its compatriots, Cai Mep has weathered the coronavirus pandemic to keep growing, increasing its mark in the region as the country establishes itself as an important trading hub.

In Vietnam's staggering growth, the port of Cai Mep has both benefitted and enabled that ascension.



Cai Mep: developed into one of the most important container ports in the world.

APM Terminals/Flickr

A central location, key containership companies as terminal stakeholders and increasing boxship alliance calls have meant the port has developed into one of the most important in the world.

The Tan Cang – Cai Mep International Terminal (TCIT), the port's largest, expanded further in 2020 and broke the 2m teu barrier, reportedly growing by more than six times since its first year of operations in 2011.

APM Terminals' Cai Mep International also added on throughput, surpassing the 1m teu mark. Among the terminal's highlights was hosting

the 214,121 dwt *Margrethe Maersk*, the largest ever commercial vessel handled in a Vietnamese port.

SSIT also surpassed a record-breaking 500,000 teu in 2020, more than doubling its throughput from 2019, with increasing US export demand as well as the need for more empty containers pushing the terminal to new highs.

The port is expected to grow further as lines add it to their calling. This year, a new service, launched by Cosco and OOCL, called at CMIT, marking a new connection for Cai Mep with Asian and US east coast ports.

The Vietnamese government has also said that further developing Cai Mep will be a key part of its policy as it seeks to upgrade its ports infrastructure over the next decade.

Port authority: Vietnam Seaports Association, 3 Nguyen Tat Thanh St, HCMC, Vietnam

Website: www.vpa.org.vn

Email: info@vpa.org.vn

Terminals (Operators):

Tan Cang – Cai Mep Container Terminal JSC, TCCT (Saigon Newport)

Tan Cang – Cai Mep International Terminal Co, TCIT (Saigon Newport)

Tan Cang – Cai Mep Thi Vai Terminal, TCTT (Saigon Newport)

Cai Mep International Terminal (APM Terminals)

SP-SSA International Terminal, SSIT (SSA Marine)

43 / Salalah (Oman)

1

Throughput 2020: **4,340,000 teu**, **5.6%** (2019: 4,109,000 teu)

The Sultanate's largest port sees further gains as it puts the damage inflicted by cyclone Mekunu increasingly behind it

THE Port of Salalah, with its seven boxship berths, has been operational since 1999 and serves as the regional hub for the 2M alliance of Maersk and MSC.

Operating company Salalah Port Services Company — in which APM Terminals has a stake — is locally listed and can count on strong support from the Omani government, thanks to its centrality in the country's efforts at economic diversification.

Salalah was badly battered by cyclone Mekunu in 2018 but clocked up stellar growth in excess of 20% the following year, which more than made up for lost ground.

In 2020, it shrugged off the impact of coronavirus by achieving a record throughput volume of 4,340,000 teu, a gain of 5.6%.

However, the pandemic has taken its toll and has meant longer turnaround times for both ships and containers, SPSC admitted in its

first-quarter 2021 statement to the Muscat stock exchange, according to local media reports.

First-quarter 2021 liftings, at just under 1.1m teu, dropped 6% on the almost 1.7m teu seen in the first quarter last time round, but that was mainly a function of exceptional volumes in the opening three months of 2020, SPSC argued.

Salalah has also been recognised by the World Bank as the world's sixth-most efficient container port, according to the 2020 Container Port Performance Index.

It is also active in bulk goods and is the world's largest export facility for gypsum, exporting 9m tonnes of the mineral each year, thanks to vast domestic production. It also exports limestone.



Salalah: achieved a record throughput volume of 4,340,000 teu.

APMT

Port authority: Salalah Port Authority and offices Salalah Port Services Co. (SAOG), PO Box 369 Postal Code 211, Oman

Website: www.salalahport.com

Email: info@portofsalalah.com

Terminal (Operator):

APM Terminals Salalah (APMT)

44 / Tokyo (Japan)

5

Throughput 2020: **4,261,793 teu**, **5.5%** (2019: 4,510,000 teu)

The headline figure for the Japanese port's container throughput hides what was an extremely volatile year

JAPAN, the world's third-largest economy, was hit hard by the coronavirus pandemic in the first half of 2020.

Between April and June, the economy suffered its worst quarterly contraction for 75 years. This was followed by a steady rebound as consumer confidence became stronger.

The headline figure for Tokyo port's container throughput, a 5.5% slip to 4,261,000 teu, therefore hides what was an extremely volatile year.

The port lies at the heart of Japan's largest centre of population. Domestic consumption drives box throughput, so imports significantly outweigh exports.

Consumer spending ramped up towards the end of the year, so Tokyo's imports ended at 2,259,000 teu.

Export boxes ended the year at 874,500 teu, with 1,128,000 empties handled across the port's container berths.

Although all three categories ended the year lower, the 5% loss was mostly the impact of coronavirus on Tokyo's export throughput.

The main container terminals at Tokyo port are Aomi, with five

berths; Shinagawa, with three; Oi, with seven; and Kamigumi, with one.

A new container facility, Y3 Terminal, is planned to start in the near future at Outer Central Breakwater.

The new terminal is much needed. Tokyo's facilities have been under pressure as containership capacity has grown rapidly.

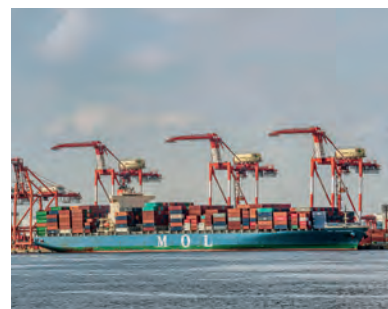
Most berth lengths can only accommodate vessels of about 8,000 teu. Larger vessels require two berths.

This has led to congestion, delays, changes to ship rotation, and storage yards struggling to handle inbound and outbound containers.

The importance of new terminal investment at Tokyo port is shown in Japan's exports to the US, a major trading partner.

For full-year 2020, Tokyo handled 209,000 teu of export boxes destined for the US, a fall of 8% on 2019. This was almost double that of the second-largest Japanese port, Nagoya — and almost three times that of third-placed Kobe.

Until Y3 Terminal is open for business, Japanese containers will continue to be transhipped in ports outside the country.



Tokyo: situated at the heart of the world's third-largest economy.

travelbild-asia/Alamy Stock Photo

Port authority: Bureau of Port and Harbor, Tokyo Metropolitan Government, 8-1 Nishishinjuku 2-chome Shinjuku-ku Tokyo 163-8001, Japan

Website: www.kouwan.metro.tokyo.jp

Email: kouwan_kouhou@section.metro.tokyo.jp / yamamotok@tpc.co.jp

Terminals (Operators):

Aomi berths one and two (Isewan Terminal Service, Sankyu, Sumitomo Warehouse, Daiichi Transportation & Terminal and Nippon Express)

Aomi berth three (Mitsui-Soko, Nippon Express and Kamigumi)

Aomi berth four (Suzue)

Oi berth 01 (Tokyo Kokusai Koun; lessee K Line)

Oi berth 02 (Daito; lessee K Line)

Oi berth 03 (UTO; lessee MOL)

Oi berth 04 (International Container Terminal Co; lessee MOL)

Oi berth 05 (Azuma Shipping; lessee Wan Hai Lines)

Oi berth 06 (Nippon Container Terminals; lessee NYK)

Oi berth 07 (Uni-x; lessee NYK)

Shinagawa Container Terminal (Daiichi Transportation & Terminal, The Sumitomo Warehouse, Azuma Shipping, Nippon Express, Sankyu)

Y1 Terminal (Kamigumi Company)

45 / Santos (Brazil)

2

Throughput 2020: **4,232,046 teu**, **1.6%** (2019: 4,165,248 teu)

Brazil's biggest port proves resilient while planning container terminal investments

BRAZIL'S port of Santos proved resilient through the pandemic, managing to increase throughput by 1.6% to 4.2m teu.

Santos's result continues its run of record annual figures. It has grown rapidly in past years but slowed to 1% growth in 2019.

Fernando Biral became chief executive of the Santos Port Authority in April, pledging to win the trust of investors

and the community after a turnaround plan.

On the infrastructure side, plans are under way for a new terminal in the Saboó region, on the port's right bank, expected to come in at R2.2bn (\$432m). The auction to build the project will happen in early 2022.

Santos Brasil, which operates Tecon, the biggest container terminal, hopes to expand its berth by 220 m to a total 1,510 m: 1,200 m at Tecon and 310 m at the TEV vehicle terminal.

Brasil Terminal Portuário (BTP) — the second-largest container terminal — finished migrating to its new Opus Terminal operation system. The \$3m project took 18 months to implement and is meant to optimise and modernise the terminal operations while preparing it for future growth.

Tecon's expansion plan foresees investments of as much as R1.5bn (\$295m) to improve productivity, energy efficiency and speed, with the aim of increasing its capacity



Santos: has grown rapidly in past years and continued its run of record annual figures in 2020.
Santos Port Authority

from 2m teu a year to 2.4m teu a year.

BTP recently requested an early lease renewal, committing to invest about R1.3bn for the next 20 years of extension.

In September, the Port of Santos implemented stricter inspection and access rules on older ships as part of a new berthing and mooring policy.

It stopped accepting vessels built before 1990 unless they had documents proving they had been retrofitted.

Vessels built before 2002 were subject to port state checks and the need for P&I and wreck removal cover.

Port authority: Santos Port Authority (SPA), Avenida Conselheiro Rodrigues Alves, Macuco, Santos, Sao Paulo 11015-900, Brazil

Website: www.portodesantos.com.br

Email: spa@brssz.com

Terminals (Operators):

Tecon Santos (Santos Brasil)

Tecondi (Ecoporto)

Embraport (DP World)

Brasil Terminal Portuário (Terminal Investment Ltd and APM Terminals)

46 / Port Said (Egypt)

NO CHANGE

Throughput 2020: **4,009,672 teu**, **9.6%** (2019: 3,658,159 teu)

Egyptian port posts further throughput gains in 2020, but sees contrasting fortunes for its two terminals on opposite banks of the Suez Canal

PORT Said sits at the northern entrance of the Suez Canal, the scene of headline news globally this year when the grounding of the containership *Ever Given* clogged the crucial trade artery.

Before the drama unfolded, Port Said followed up the previous year's stellar performance with another strong throughput result in 2020, climbing nearly 10% to eclipse the 4m teu mark.

Despite the milestone, it was not enough to lift the Egyptian port in the Lloyd's List rankings, remaining in 46th position.

Last year was a tale of contrasting fortunes for Port Said's two terminals.

While the smaller Port Said Container Terminal, operated by Port Said Container & Cargo Handling on the port's west side, endured a difficult 12-month period, volumes at the APM Terminals-operated Suez Canal Container Terminal continued to go from strength to strength.

According to Egypt's Ministry of Transport, SCCT saw volumes increase by just shy of 17% to more than 3.5m teu in 2020 on the previous year.

SCCT operates predominantly as a transshipment hub for the eastern Mediterranean, serving as a vital stopover for east-west cargoes transiting the famous waterway that bears its name.

While transshipment business has remained brisk, with several key mainline services added in recent years, SCCT has also enhanced its profile as a gateway terminal.

Although its location on the eastern bank of the Suez is sparse in population, a series of new tunnels under the canal has created a key link to Egypt's industrial heartland and its capital, Cairo.



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This development has put SCCT in direct competition with local rival PSCCHC for a share in this lucrative market.

With volumes at PSCCHC sliding by nearly one-quarter last year and considerable gains to gateway traffic reported by SSCT, evidence suggests it is a competition the latter is currently winning.

Port authority: Port Said Port Authority, intersection of Mostafa Kamel and Azmy Streets, Railway Square, Port Said, Egypt

Website: www.mts.gov.eg

Email: contact@mts.gov.eg

Terminals (Operators):

Port Said Container Terminal (Port Said Container & Cargo Handling)

Suez Canal Container Terminal (APM Terminals)



Port Said: sits at the northern entrance of the Suez Canal.

SCCT

47 / Qinzhou (China)

NEW

Throughput 2020: **3,950,000 teu**, **▲1.3%** (2019: 4,000,000 teu)

Port in the Beibu Gulf shoots to prominence among China's southwest cluster

BENEFITTING from a favourable combination of factors, Qinzhou port in the Beibu Gulf has shot to prominence among China's ports in the southwest cluster.

It posted a 31% increase in throughput to almost 4m teu in 2020, building on the previous year's performance, where it more than doubled volumes to break through the 3m teu mark.

Big investments from major port players and the inauguration of China's International Land-Sea Trade Corridor (ILSTC), of which Qinzhou is the main terminal, helped to open up new markets.

The Qinzhou Railway Container Central Station in Qinzhou port — soon to be fully integrated with berths 7 to 10 — is one of only 12 dedicated rail container stations in the country.

The ILSTC, which is primarily aimed at boosting connectivity for China's landlocked western provinces to Southeast Asia, was made a national priority project in 2019 and Qinzhou was



Qinzhou: big investments from major port players helped to open up new markets.

Cynthia Lee/Alamy Stock Photo

earmarked as the gateway port for the route.

Its status has been further upgraded to being an international hub port for the Belt and Road Initiative in 2021.

The port has received a boost with the entry of Cosco Shipping Ports, which took a 26% stake in Guangxi Beibu Gulf Terminal in October 2020.

This added the clout of the massive group to the already strong partnership of the previous joint venture between Beibu Gulf Port Group and Singapore-based PSA.

Apart from pumping in Yuan487m (\$72m) of cash, it will also inject its 40% stake in Guangxi Qinzhou Terminal, which manages berths 1 and 2, creating more synergies to the entity that operates berths 3 to 6.

Guangxi Beibu Gulf Terminal is now developing berths 7 to 10, which will be a fully automated container terminal specifically designed to cater for rail-sea intermodal operations.

Deepening of the east channel to 16.3 m will open the port to mega boxships by June 2021, while investments in landside infrastructure also continue apace.

The Yuan7.1bn berth expansion project will add an additional 2.6m teu in annual capacity when it is completed in 2023. The rail-sea focus is prudent, with intermodal volumes doubling in 2020 to almost 300,000 teu.

Equipment is also being upgraded, with six automated rail-mounted gantry cranes due to come online by June 2021.

These will work together with 30 intelligent guided transport vehicles for yard movements.

This sets the port well on the path to a container throughput target of 6m teu in 2021.

The port weathered the coronavirus outbreak well, cutting fees and extending support to customers while also opening new routes to its key Asean market to take advantage of market gaps that opened up during the crisis.

New services included compatriot intra-Asia stalwart SITC's additional forays into Vietnam and Cambodia, as well as South Korea and Japan.

It also added capacity and service variety to Laem Chabang,

such as special reefer services to overcome overland route disruptions due to Covid-19.

Giant new partner Cosco Shipping has chipped in with a new US service.

Meanwhile, domestic carriers are also adding services to boost north-south linkages and connections to the inland river networks in eastern China.

These include Cosco Shipping's direct connection to the Yangtze River Delta hub of Taicang, and Shanghai China Grain Steam's service to the northern hub of Tianjin.

The port currently has 52 container routes, comprising 24 domestic trade and 28 foreign trade, including 19 Asean routes.

This burgeoning port in the relatively isolated southwest of China is seeing its star rising due to a combination of official policy and timely investments.

With strong ambitions, it is one to look out for as trade patterns shift and production centres move away from the traditional bases in the southern and eastern coastal belts.

Port authority: Beibu Gulf Port Qinzhou Terminal Co., Ltd. Building B, Beibu Gulf International Gateway Port Shipping Service Center, Qinzhou Free Trade Port Zone, Guangxi
Website: www.qzwgw.com
Email: bbwggzmt@163.com
Terminal (Operator): Beibu Gulf Port Qinzhou Terminal

48 / Tanjung Perak (Indonesia)

3

Throughput 2020: **3,600,000 teu***, **7.7%** (2019: 3,900,000 teu)

With the ever-increasing sizes of ships deployed by shipping lines, the port's infrastructure becomes a key challenge

THE port of Surabaya, popularly known as the port of Tanjung Perak, is the second major facility of Indonesia and the country's hub of eastern domestic trade.

Tanjung Perak handled fewer containers in 2020 than the previous year, with throughput falling 7.7% to 3.6m teu as the economy contracted.

Pelindo III, the state-controlled enterprise that runs the port's terminals, has been continuing alone since DP World left TPS in 2017.

The port has a draught of 12 m and can handle containerships of up to 4,000 teu. With the ever-increasing sizes of ships deployed by shipping lines, Tanjung Perak's infrastructure has become a key challenge.

DP World is continuing its involvement in the Indonesian market, tying up with local conglomerate Maspion Group on a \$1.2bn project in eastern Java.



Tanjung Perak: Indonesia's hub of eastern domestic trade.

Alexey Kornilyev/Alamy Stock Photo

The deal will see the partners co-operating to build a modern, environmentally friendly container terminal with electric-powered equipment and industrial logistics park.

The new container terminal is designed to handle 3m teu per year, making it one of the largest in the vicinity. It is expected to have more capability to absorb cargo and to get higher market shares.

TPS, located on the northern shore of eastern Java, which is now being operated by Pelindo III, has a capacity of 2.5m teu.

Although it is ideally located to act as an international and domestic transshipment point for all of north and east Indonesia, it has a limitation of land area for development.

The existence of a new terminal in Surabaya greater port area would increase trade capacity as cargo owners will have more space when sending their goods for both international and domestic trade.

**estimated figures*

Port authority: Port of Tanjung Perak Port Authority Office. Jl Perak Timur No. 396, Pabean Cantikan, Surabaya City, East Java – 60165.
Website: pelindo.co.id
Email: info@pelindo.co.id
Terminals (Operators):
 Terminal Petikemas Surabaya (Pelindo III)
 Mirah Terminal (Pelindo III)
 Nilam Terminal (Pelindo III)
 Jamrud Terminal (Pelindo III)
 Berlian Terminal (Pelindo III)
 Kalimas Terminal (Pelindo III)
 Terminal Teluk Lamong (Pelindo III)

49 / Fuzhou (China)

2

Throughput 2020: **3,520,000 teu**, **↓ 0.6%** (2019: 3,540,000 teu)

Port is destined to take a supporting role to Xiamen as part of the Chinese province's port consolidation moves

DESPITE a slight drop in throughput in 2020, Fuzhou port still managed to rise two places in the rankings, mainly because other ports similar to it — such as Dongguan in neighbouring Guangdong province — performed even worse.

The jury is out, however, on the effect of latest developments on its future fortunes. As part of Fujian province's port consolidation under the Fujian Port Group, it is destined to take a supporting role to the cluster's top port of Xiamen.

While the gap between them is vast and it makes sense for Xiamen to take the leading role, Fuzhou has also been developing some interesting niche routes.

Fuzhou only has 11 of the 70 so-called Silk Road Shipping routes, but interestingly Cosco Shipping has been actively increasing mainline services calling at Fuzhou, including a new transpacific service.

The government is also continuing a subsidy programme aimed at boosting traffic, as well as shifting more bulk cargoes to containerised transportation.

Meanwhile, it is also continuing efforts to expand cross-strait volumes. Two dedicated services



Fuzhou: been developing some interesting niche routes.

PSA

for e-commerce-related shipping linking Fuzhou to major Taiwanese ports have been initiated by Fujian Rongdatong Supply Chain Management, Alibaba logistics arm Cainiao and Fuzhou Mawei Steamship.

However, as seen in its lacklustre performance, Fuzhou has not had the late surge in volumes seen at other major Chinese export ports.

Its strategy of building up niche international routes, as well as the cross-strait trade, seems to have been a victim of global economic and geopolitical conditions as the coronavirus pandemic and trade tensions took their toll.

The port is keeping up investments despite an uncertain future, with the provincial government pledging to speed up the construction of berths 6-9 in the main Jiangyin container terminal.

Fuzhou is also improving rail links and boosting intermodal connections, starting direct rail services to inland destinations in June.

Nevertheless, with fellow provincial port Quanzhou being designated as the main domestic traffic port and Xiamen dominating international volumes, the still unspecified role that the new consolidated port group has planned for Fuzhou will ultimately determine its path going forward.

Port authority: Fujian Port and Channel Administrative Bureau, No 283 Yanqiao Middle Road, Fuzhou, Fuzhou, China

Website: www.jtyst.fujian.gov.cn

Email: ghjbgs@fjzt.gov.cn

Terminals (Operators):

Fuzhou Qingzhou Container Terminal (Fuzhou Port Group and PSA)

Fuzhou International Container Terminal (Fuzhou Port Group and PSA)

Fujian Jiangyin International Container Terminal (Fuzhou Port Group and PSA)

50 / Vancouver (Canada)

2

Throughput 2020: **3,467,521 teu**, **↑ 2%** (2019: 3,398,860 teu)

Despite tumultuous world events, throughput remains steady for a second consecutive year

CANADA largest container port on North America's west coast was spared the intense peak-season congestion and delays that blighted transpacific services serving busier

US ports further south at Los Angeles and Long Beach in 2020's final half.

Throughput remained steady for a second consecutive year despite the tumultuous events that

impacted global supply chains. This suggests that threatened diversions to the Canadian port to alleviate congestion elsewhere failed to materialise.

However, the port expects international container trade will rise in coming years and is planning accordingly.

A reconfiguration and expansion of the existing Centerm container terminal — one of four — that will increase handling capacity by two-thirds to 1.5m teu, up from 900,000 teu, is due for completion in 2022, according to the port authority.

As of June 2021, it had yet to secure regulatory approvals and permits to build a fifth terminal, the 2.4m teu Roberts Bank terminal 2. The six-year project aims to be ready by the late-2020s.

However, Global Container Terminals Canada, which operates the Vanterm and Deltaport terminals, completed the second

stage of its intermodal rail yard development at the end of 2020 and added two 14,000 teu-capable ship-to-shore cranes.

DP World, which operates the Centerm terminal, also acquired the Surrey, Fraser River multipurpose marine terminal that handles containers, as well as bulk and breakbulk products, in February 2020.

Port authority: Vancouver Fraser Port Authority, 100 The Pointe, 999 Canada Place, Vancouver, BC, Canada V6C 3T4

Email: Commercial_Enquiries@portvancouver.com

Website: www.portvancouver.com

Terminals (Operators):

Centerm (DP World Vancouver)

Deltaport (GCT Canada)

Fraser Surrey Docks (DP World)

Vanterm (GCT Canada)



Vancouver: expects international container trade will rise in coming years and is planning accordingly.

Port of Vancouver

51 / **Felixstowe** (United Kingdom)

1

Throughput 2020: **3,435,000 teu***, **▲ 9.6%** (2019: 3,800,000 teu*)

After a year blighted by congestion, the UK east coast port needs to work to repair its reputation

FIGURES for Felixstowe are hard to come by, as the port's operator Hutchison does not break out individual numbers for its operations.

Some estimates, however, can be made from publicly available data.

Hutchison does produce national throughput figures for the UK and, as the vast bulk of its UK container operations are through Felixstowe, 2020 volumes will be within a rounding error of 3.4m teu.

UK government figures from 2019 gave Felixstowe a 36% share of the UK's 10.5m teu throughput, which would have put the previous year's volumes at 3.8m.

So, on that very rough calculation, Felixstowe would have seen a decline in volumes of just over 9.6% in 2020.

Statistics from the Department for Transport also show that the tonnage handled by Felixstowe fell



Felixstowe: UK's largest container port suffered a significant downturn during the pandemic.

Port of Felixstowe

by 9% in 2020, from 25.3m tonnes to 23m tonnes.

Whatever the exact figure turns out to be, the fact is that the UK's largest container port suffered a significant downturn during the pandemic.

In the early stages of the outbreak, Felixstowe was among the worst hit by carriers blanking sailings, with nearly one-third

of vessel arrivals being blanked from regular services in the second quarter.

As volumes bounced back in the third quarter, however, Felixstowe was the first to feel the pain of congestion in the UK.

By the middle of September, the British International Freight Association was complaining that operational performance

had become challenging and was escalating to a level that was damaging the businesses of its members.

The port announced that it was no longer accepting empties and carriers calling at Felixstowe began to add congestion surcharges.

The UK government was called on to help resolve the problem, but the closest Felixstowe came to that was the appointment of former transport secretary Chris Grayling as a part-time adviser. A few weeks later, former boss Chris Lewis was persuaded out of retirement

as the complaints continued, and appointed chief executive of Hutchison Ports UK. He reports to Clemence Cheng, who retains his role as managing director of Hutchison Ports Europe. Hutchison strenuously denied that head office had intervened as the delays and disruption worsened.

By year-end, the problems were starting to ease, but only after spreading to other UK hubs like London Gateway and Southampton.

The challenge this year will be for Felixstowe to recover the services it has lost. According to Drewry,

Felixstowe lost five services, 35% of its total, during the first quarter of 2021.

Those will be volumes that Felixstowe will want to — and needs to — see return.

**estimated figures*

Port authority: Port of Felixstowe, Tomline House, The Dock, Felixstowe IP11 3SY, UK

Website: www.portoffelixstowe.co.uk

Email: enquiries@fdrc.co.uk

Terminals (Operators):

Trinity Terminal (Hutchison Ports UK)
South Terminal (HPUK)

52 / Dongguan (China)

3

Throughput 2020: **3,420,000 teu**, **7.1%** (2019: 3,680,000 teu)

Port in Guangdong province takes a big hit from the pandemic and fails to turn the corner in the second half

DONGGUAN, a large port located in China's Guangdong province, took a big hit from the coronavirus pandemic in 2020.

And, unlike many other Chinese ports, it failed to turn the corner in the second half of the year when the country's economy and trade began to rebound.

Some of the reason for this could derive from Antong Shipping, which used to be a main container shipping carrier serving China's domestic trade.

The financially troubled company, a major client of Dongguan, was under restructuring last year and hence suspended a large portion of its operations.

Now Antong's business has been reduced to only a few barge services to Guangzhou, according to the official website of Dongguan Port Group, the main operator.

Efforts are being made to increase efficiency and gain more cargo.

In May, DPG began to remove the fence between the port's domestic



Dongguan: efforts being made to increase efficiency and gain more cargo.

UPI/Alamy Stock Photo

trade and foreign trade sections, which is expected to increase the utilisation rate of berths and storage yards by 20% and 25%, respectively.

Meanwhile, it is trying to strengthen its relationship with other domestic feeder carriers, such as Zhonggu Shipping.

The latter took over a 49% stake originally owned by PSA in Dongguan International Container Terminal in October 2020 and has been backing the facility with more services, including a coastal lane launched in December, linking Yingkou Port in northern China.

Dongguan's handling volume increased 10.3% year on year to 1.3m teu in January-May. It has set an ambitious goal to reach 6m teu, 8m teu and 10m teu in 2025, 2030 and 2035, respectively.

Port authority: 23F, Dongguan Port Enterprise Headquarters Building, Port Avenue, Shatian Town, Dongguan City, Guangdong Province, China

Website: <http://en.dgportgroup.com>

Email: dgwjt@dgportgroup.com

Terminals (Operators):

Dongguan International Container Terminal (DPG-Zhonghu)
Dongguan Sinotrans Shilong Terminal (Sinotrans)

53 / Seattle/Tacoma (United States)

6

Throughput 2020: **3,320,379 teu**, **12%** (2019: 3,775,303 teu)

NWSA's new intermodal service represents a welcome relief for agricultural shippers looking to export products overseas

AS ports across the US saw volumes decline due to the pandemic, the Northwest Seaport Alliance, which manages the container terminals in Seattle and Tacoma, implemented safety protocols that enabled port operations to continue, with throughput volumes rebounding above 2019 levels in the fourth quarter

For NWSA, the downturn in throughput actually lasted until November, when container volumes hit 301,932 teu, increasing by 11.3% year over year. The uptick continued in December, when NWSA's volumes rose by 6.1% to 301,814 teu from 284,452 teu the year earlier.

At the time, NWSA said import demand remained strong and forecast it to remain steady through the first quarter of 2021 — a point underlined by CMA CGM's new Golden Gate Bridge service, with a Shanghai-Yantian-Oakland-Seattle-Kaohsiung-Shanghai rotation beginning in February 2021.

A genuinely key development took place in October, when NWSA announced a new intermodal service to and from North Dakota,

representing a welcome relief for agricultural shippers looking to export products overseas.

The service runs once a fortnight from a new BNSF intermodal rail facility in Minot, North Dakota, linking agricultural shippers to ocean carriers, including Mediterranean Shipping Co and CMA CGM.

NWSA's decision will sit well with agricultural exporters who have been especially vocal during the pandemic about the imbalance of imports over exports, accusing carriers of rushing containers back to Asia empty instead of full of agricultural produce.

At the same time, NWSA's link to America's agricultural centres will position the ports to serve an Asian export market that is destined to increase in size, sophistication and wealth in the foreseeable future.

Peter Steinbrueck, Port of Seattle commission president and NWSA co-chair, summed up the meaning of the new rail service as providing lower costs for the ports' export customers in the Great Plains and, more importantly, also supporting "new, additional cargo, which will help grow our market share".



Tacoma: NWSA opened new trade routes in 2020.

NWSA

Port authority: The Northwest Seaport Alliance, PO Box 2985, Tacoma, WA 98401-2985

Website: www.nwseaportalliance.com

Email: info@nwseaportalliance.com

Terminals (Operators):

Terminal 18 (SSA Terminals)
Terminal 30 (SSA Terminals)
Terminal 5 (SSA Terminals)
Husky Terminal (Husky Terminal & Stevedoring)
Pierce County Terminal (Everport Terminal Services)
Terminal 7 (NWSA)
TOTE Maritime Alaska Terminal (TOTE Maritime Alaska)
Washington United Terminals (Washington United Terminals)
West Sicum Terminal (SSA Terminals)

54 / Yantai (China)

2

Throughput 2020: **3,300,200 teu**, **6.4%** (2019: 3,102,400 teu)

A consolidation scheme, prompted by the provincial government, has strengthened the port's position as a key feeder facility for Qingdao

AFFECTED by the coronavirus pandemic, Yantai only saw container throughput edge up 2.1% for the first half of 2020. Hence the 6.4% full-year growth reflected the quick

rebound of China's economy and exports.

To garner more cargo, Yantai has enhanced its coastal trade networks within the Bohai Rim, where it is located, adding services

linking Weifang, Tianjin and other ports in Heibei province.

Other efforts include building inland intermodal terminals to speed up logistics in the hinterland, and better connection

to the nearby Qingdao port, a major trading hub, to increase export shipments.

This is what the Shandong provincial government has expected to see as a result of its port consolidation scheme.

Yantai is now part of the Shandong Port Group, which also includes Qingdao, Rizhao, Weifang and several smaller ports. This has strengthened Yantai's position as a key feeder port for Qingdao.

Under such mode, Yantai no longer loses its export cargo to Qingdao as this used to be hauled via road transport directly to the latter hub.

These containers now get cleared at customs in Yantai and, from there, are shipped to Qingdao, waiting to be loaded onto larger ships heading to the west.

Yantai handled 1.5m containers in January-May, up 11.5% from the year-ago period.

Port authority: Yantai Port & Navigation Administration, Level 9, No. 2, Huanshan Road, Yantai City, China

Website: www.yantaiport.com.cn/gywm.jhtml

Email: ytport@yantaiport.com.cn

Terminals (Operators):

Yantai Port Container Terminals (Yantai Port Group)

Yantai International Container Terminals (ICTSI HongKong, Yantai Port Holdings and DP World)



Yantai: enhanced its coastal trade networks within the Bohai Rim.

Yantai Port

55 / Incheon (South Korea)

2

Throughput 2020: **3,272,213 teu**, **5.8%** (2019: 3,091,955 teu)

The government's impressive handling of the pandemic keeps businesses trading, boosting both imports and exports

INCHEON, the port serving South Korea's capital city of Seoul, reported an all-time-high throughput for 2020, at almost 3.3m teu.

This reflects the country's impressive response to the coronavirus pandemic.

The government used the experience of Middle East respiratory syndrome (MERS) to flatten the epidemic curve quickly without closing businesses, issuing stay-at-home orders, or implementing many of the stricter measures adopted by other high-income countries until late 2020.

As a result, Incheon port handled more than 1.6m teu in import containers (up by 3.7%) and almost 1.6m teu in exports (up by 5.6%).

Transhipments and offshore shipments hit 69,436 teu and 8,930 teu, respectively, according to Incheon Port Authority.

China once again dominated the port's trade.



Incheon: China receives two-thirds of the port's export containers.

Asia/Alamy Stock Photo

Imports from Chinese ports increased by 4.4% to a total of 933,000 teu, representing almost 60% of all imports.

Meanwhile, Incheon's exports to China grew by 4% to just over 1m teu — being 65% of all exports.

The port also imported from Vietnam, Thailand, Indonesia and Malaysia — all at higher levels than 2019.

Export containers were sent from Incheon to Vietnam, Taiwan and Hong Kong.

China and Vietnam, which accounted for a combined 78% of container traffic volume at Incheon port, recovered relatively early from the Covid-19 pandemic.

The container traffic volume to and from these two countries began to pick up from April 2020, showing a double-digit increase rate beginning in July.

Incheon's South Port has a pier with three container berths for 4,000 teu ships; New Port offers a container pier with six berths available for ships up to 12,000 teu.

Towards the end of the year, Incheon Port Authority announced a multi-project plan to build a smart port, which was in line with the country's post-Covid-19 New Deal programme.

The port plans to adopt a completely automated system for its new phase 1-2 container terminal, scheduled to open in 2025.

This will use remote-controlled automated guided vehicles powered by electricity to speed up workflow, cut pollution and reduce risk to staff.

The port authority also plans to nurture new logistics companies while strengthening the port's competitiveness by creating a shareable platform so the system can be provided at an affordable price to small and medium-sized businesses from 2023.

Port authority: Incheon Port Authority, (22332) New JungSeok Building, 366, Seoheae-daero, Jung-gu, Incheon Metropolitan City, South Korea

Website: www.icpa.or.kr/eng

Email: mykim08@icpa.or.kr

Terminals (Operators):

ICT (ICT/PSA)

E1 Container Terminal (E1CT)

Sun Kwang Incheon Container Terminal (SNCT)

Hanjin Container Terminal (HJIT)

56 / Abu Dhabi (United Arab Emirates)

15

Throughput 2020: 3,220,000 teu, **15.8%** (2019: 2,780,000 teu)

UAE port goes from strength to strength with the backing of Cosco and MSC, becoming one of the few to achieve double-digit volume growth

THE UAE port of Abu Dhabi continues its ascent up the Lloyd's List Top 100 rankings off the back of another year of impressive volume growth.

Container throughput figures increased by nearly 16% to 3.2m teu, making Abu Dhabi one of only a handful of ports to achieve double-digit volume growth in a 12-month period where numbers globally were weighed down by the impact of the coronavirus pandemic.

With volumes eclipsing the 3m teu mark, Abu Dhabi has nearly doubled its total teu traffic in the space of two years.

Abu Dhabi's success has been marked by the arrival of container shipping giants Cosco and Mediterranean Shipping Co, who have been tied to the port by respective concessionaries.

Cosco, through its port arm Cosco Shipping Ports, moved into the port's new second terminal, CSP Abu Dhabi Terminal, in late 2018.

Meanwhile, MSC agreed a long-term tender with Abu Dhabi Ports to operate and expand the existing Khalifa Port Container Terminal later that year. This expansion was completed in 2020, increasing capacity to 5m teu in the process.

The result has been a significant uptick in traffic, with both MSC and



Abu Dhabi: has nearly doubled its total teu traffic in the space of two years.

ADPC

Cosco increasingly looking to make use of their vented interest by driving volumes through the port.

Last year, this included Khalifa Port Container Terminal welcoming a new mainline service under 2M, MSC's vessel-sharing agreement with Maersk Line.

Cosco's facility also added a new weekly loop, serving ports across Europe and the Indian subcontinent.

Abu Dhabi Ports' marine arm, Safeen, also launched a new feeder service at the port, linking the UAE with the wider Gulf region, as well as the Indian subcontinent.

Volumes are only expected to increase in the coming years as the terminal's tenants draw in more services.

Further business is also expected to be generated by

the expanding Khalifa Industrial Zone Abu Dhabi, a vast free zone supporting port and logistics operations.

Inland links, too, will be greatly enhanced by the Etihad Rail development, which is on track for completion by 2023.

A spokesperson for Abu Dhabi Ports told Lloyd's List that ongoing developments have positioned it on the path to its long-term goal of elevating capacity to as much as 9m teu come 2024.

Port authority: Abu Dhabi Ports, Headquarters, Gate 1, next to Zayed Port, Al Mina Street. P.O. Box - 54477, Abu Dhabi

Website: www.adports.ae

Email: media@adports.ae

Terminals (Operators):

Khalifa Port Container Terminal (Terminal Investment Ltd)

Cosco Shipping Ports Abu Dhabi Terminal (CS Ports)



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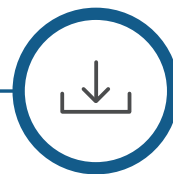
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57 / Gioia Tauro (Italy)

21

Throughput 2020: **3,193,000 teu**, **26.6%** (2019: 2,523,000 teu)

Carrier ownership drives a large lift in volumes at the Mediterranean hub

EVEN in a normal year, growing container throughput by one-quarter would be a significant achievement for any port.

Doing it in the middle of a pandemic, when global container trade fell by 2%, and in the European country that was hit first and hardest by the initial wave of Covid-19 infections, was truly remarkable.

Nevertheless, Gioia Tauro managed to add 670,000 teu to its volumes last year as Italy's largest transshipment hub surged ahead, up 21 places in the rankings.

The improvement in volumes was largely down to the acquisition in 2019 of Medcenter Container Terminal by Terminal Investments Ltd, Mediterranean Shipping Co's terminal-operating division.

TIL completed a deal with Contship Italia to take full control of MCT. Contship Italia owned 50% of CSM Italia Gate, the company that controls the MCT concession.

The deal gave TIL subsidiary Itaterminaux 100% control of CSM Italia Gate, meaning it indirectly owns all the shares of MCT.



Gioia Tauro: managed to add 670,000 teu to its volumes last year.

Reuters/Alamy Stock Photo

With a container line now owning the port's sole container terminal, MSC has channelled more of its cargoes through Gioia Tauro, which is now the sixth-largest port in a crowded Mediterranean market.

Despite requiring a diversion from the more direct route through the Mediterranean, Gioia Tauro's carrier ownership model saw it grow, while neighbouring rivals such as Malta's Marsaxlokk recorded a 10% decline in volumes last year.

Gioia Tauro still has a little way to go before reclaiming its previous record of more than 3.4m teu, back when Maersk was its primary customer, but under MSC and TIL's ownership, that time is probably not far off.

Port authority: Contrada Lamia, 89013, Gioia Tauro, Italy

Website: www.portodigioiatauro.it

Email: info@portodigioiatauro.it

Terminal (Operator):

Medcenter Container Terminal (Terminal Investment Italy, 100% owned by MSC)

58 / Balboa (Panama)

8

Throughput 2020: **3,161,900 teu**, **9.2%** (2019: 2,894,654 teu)

Despite Covid-19, the port reverses slowing growth as the PSA Panama terminal welcomes services from The Alliance

PANAMA'S port of Balboa grew 9.2% in throughput in 2020, as high demand for goods in Latin America helped it weather an early pandemic hit.

On the Pacific side of the Panama Canal, volumes at the Hutchison-operated Panama Ports Co grew 1.7% to 1.96m teu, while

the newer PSA Panama International Container Terminal, which started operations in 2018, surged ahead by 23.6% to 1.2m teu.

Hutchison PPC said Latin America still presented high demand for goods, which had meant positive volumes despite the Covid-19 pandemic.

Things started looking up in September 2020, with the arrival of two new services — the WSA from Asia and the MCX from central America — boosting transshipment volumes.

Throughput at PPC has declined in recent years as the PSA terminal has taken a higher share of its

cargo; last year, throughput at PPC fell 6.3%, while PSA's rose 9%.

PSA Panama passed its one million teu mark in 2020, according to Lloyd's List's sister publication, Seatrade Maritime.

PSA attributed its success to its strategic location and ability to store containers until their receivers were ready for them, as post-lockdown volumes surged across the world, causing widespread congestion.

The Alliance also started calling at PSA in May 2020 in a boost for the port, while a good fruit season and vaccine rollout were cause for optimism in 2021, according to Seatrade.

On the infrastructure front, Balboa has renovated a warehouse inside the terminal to perform cross-docking activities.

PSA Panama and PPC agreed in February 2021 to work together with the Panama Canal to help Latin America's vaccine rollout. They were to co-operate on a logistics hub on the Pacific side of the canal.

Port authority: Panama Ports Company, Avenida Arnulfo Arias Madrid, Edificio 1501, Apartado 0843-00574, Panama

Website: www.ppc.com.pa

Email: customerservices@ppc.com.pa

Terminals (Operators):

Balboa (Hutchison Ports PPC)

PSA Panama International Terminal (PSA)



Balboa: surged ahead as its new PSA terminal grew by 23.6%.

Hutchison PPC

59 / Cartagena (Colombia)

1

Throughput 2020: **3,127,579 teu**, **4.4%** (2019: 2,995,031 teu)

Transshipment hub continues its upward climb as exports of reefer cargoes rise 56%, with potential for further growth

COLOMBIA'S biggest port's growth slowed in 2020 but strong reefer cargo exports helped Cartagena top 3m teu in 2020.

Throughput rose 4.4% to 3.1m teu 2020, helped by a 56.1% increase in avocados, meat products, blueberries and citrus, with the port noting these had potential for further growth.

That compared with its 8.9% jump the year before Covid-19, when changes to traffic and services in the region created new transshipment volumes and diverted other services to Cartagena.

The port has reached 4,000 reefer plugs and has increased container yard space. It has also installed 6,000 solar panels to meet 10% of its electricity needs renewably.

The port counts Hapag-Lloyd, CMA CGM and Ocean Network Express among its customers. It recently hosted ONE's 14,027 teu mega boxship *One Hawk*, one of



Cartagena: optimising cargo inspection areas and building a data centre for digitalisation.

Hector Rico/Port of Cartagena Group

the biggest vessels to arrive in Colombian waters.

Port of Cartagena Group said it budgeted investments of Peso125bn (\$34.2m) in 2021.

This would go towards improving services for domestic cargo, including optimising cargo inspection areas, expanding storage yards, boosting capacity to handle reefer containers, warehouse expansion, and digitalisation.

Cartagena is also building a data centre to improve and modernise its data handling.

Port authority: Sociedad Portuaria Regional de Cartagena SA, Manga Terminal Maritimo

Website: www.puertocartagena.com

Email: comunicaciones@sprc.com.co

Terminals (Operators):

Sociedad Portuaria Regional de Cartagena (SPRC)

Terminal de Contenedores de Cartagena (Contecar)

60 / Tangshan (China)

74

Throughput 2020: **3,120,000 teu**, **74** 6% (2019: 2,944,000 teu)

Volumes spring back to life and help entrench the port firmly in the more-than-3m teu category

AFTER a blip in 2019, Tangshan port's container volumes sprang back to life with a 6% rise to entrench it firmly in the more-than-3m teu category and push it four places higher in the rankings for 2020.

The port claimed to have been operating normally despite Covid-19 lockdowns, helped possibly by its automated container terminal facilities.

Tangshan port has also been working to better integrate its two container terminals of Jingtang and Caofeidian, the former being the predominant one for the box trade and still currently accounting for more than 70% of container throughput.

The Hebei provincial authorities have committed to including Tangshan as an internal trade link port in the Bohai Bay region as part of a route on the eastern coast to the northwest of Tangshan that includes Beijing and the international hub port of Tianjin.

Meanwhile, the port continues to develop its liner networks, with a keen eye on China's latest dual-circulation strategy.

In 2020, six international routes were opened, increasing coverage

to all major ports in South Korea and Japan and 35 domestic trade routes were initiated.

This coverage connects Tangshan to Shanghai for the first time, as well as to other major hubs such as Guangzhou, plus others in the northeast region, such as Shandong, as well as the southwest.

Intermodal connections are also being improved, with another six inland container depots being added.

At Jingtang, the port group is investing in a channel-deepening project to provide for ultra large containerships.

Meanwhile, in October, the port added another two container berths that helped to further boost capacity and hold it in good stead for the future.

Tangshan is still very much dependent on the traditional steel trade and its related products that the Chinese government is encouraging producers to ship in containers and, for now, it seems destined to be just a supporting port to Tianjin.

However, as inland connections start to take on greater significance,



Tangshan: keeping a keen eye on China's latest dual-circulation strategy.

Xinhua/Alamy Stock Photo

with recent shifts in strategy and continuing changes in trade patterns, it may well reach its next target of getting into the 5m teu-per-year club sooner rather than later.

Port authority: Tangshan Administration Bureau for Port and Shipping, No. 14, Meiyi Road, Lubei District, Tangshan City, Hebei Province, China

Website: www.jtport.com.cn

Email: zgtsgjw@jtport.com

Terminals (Operators):

Jintang International Container Terminal (Tangshan Port Group & Tianjin Port Group)
Caofeidian Container Terminal (Port of Caofeidian Group)

61 / Nanjing (China)

77

Throughput 2020: **3,020,000 teu**, **77** 8.8% (2019: 3,310,000 teu)

China's port consolidation policy hits throughput at the key Yangtze River hub

IN a tough year, where trade volumes plunged in general, the effects of China's port consolidation policy and less business going around finally took its toll on the key Yangtze River hub of Nanjing.

Low growth in container throughput in the year before turned into an outright 8.8% decline in 2020.

The Jiangsu Port Group, of which Nanjing is part,

also includes Taicang and Lianyungang, to which some volumes are being channelled for the sake of efficiency — but at the expense of the strategic river port serving the middle

reaches of the Yangtze River transport system.

Throughput fell to 3.02m teu in 2020 from 3.31m teu in 2019, even though Nanjing remains an important part of the Yangtze River Delta port network.

The group has made various moves at its ports during the year. A major initiative was establishing a dedicated shipping division in July to further integrate its shipping assets.

This was followed in October with the founding of the Jiangsu Port Group Container Company to promote the development of the container sector and promote its strategy of integrating port and shipping assets.

Further boosting intermodal connections, Nanjing port's Longtan container terminal opened a domestic service to Yingkou in October, building on existing railway services into Longtan, which are also being enhanced.

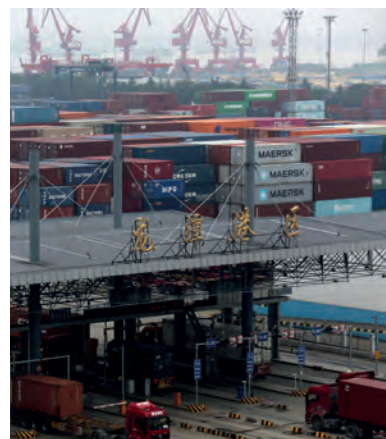
However, while the group has spent most of 2020 integrating its port and shipping assets and building its route networks, the designation of both Taicang and Nanjing as hubs is an ominous indication of Nanjing's possible future status.

Supporting regional integration in the Yangtze River Delta, the group initiated 11 new routes in the region. However, quite a few of these use Taicang as their base.

In addition, Suzhou, another one of the group's ports, has been allocated as the centre of an additional port cluster.

The latest figures show both Lianyungang and Taicang doing relatively better than Nanjing, with the former showing a slight increase and the latter holding level.

Amid constant change in the port market, how the group chooses to allocate its resources and redesigns its networks will play a large part in the future of Nanjing.



Nanjing: remains an important part of the Yangtze River Delta port network.

Sipa US/Alamy Stock Photo

Port authority: Jiangsu SASAC, Su-grain International Building 338 Zhongshan Rd, Nanjing, Jiangsu Province, China

Website: www.jsgzw.jiangsu.gov.cn/col/col11804/index.html

Email: njpkh@sina.com

Terminals (Operators):

Nanjing Port Longtan Container Co (Nanjing Port Group, Shanghai International Port Group, Cosco Shipping Ports and Sinotrans Logistics)
Nanjing Port Jiangbei Container Terminal Co (Nanjing Port Group)

62 / Houston (United States)

▲ NO CHANGE

Throughput 2020: **3,001,164 teu**, ▲ 0.4% (2019: 2,990,175 teu)

The largest port on the US Gulf surpasses the 3m teu mark for the first time in 2020

ALTHOUGH the port of Houston is better known for its energy commodities exports, it is the sixth-largest container port in the US and surpassed the 3m teu mark for the first time in 2020.

The two public container terminals have already recorded an 8% year-on-year increase in volumes for the January to May period in 2021, according to the port.

That included a 30% gain this May on the same levels last year, although figures are compared to a period when pandemic interruptions and cancelled sailings were at their height, so arrivals were at their lowest.

Volumes are anticipated to rise further for 2021, after some

transpacific container services shifted to direct services to the US Gulf.

This followed congestion at busy US west coast ports over the peak season in late 2020, which interrupted supply chains and provoked criticism of logistics management.

The Asia-US Gulf services via the Panama Canal include Houston, along with other ports of Mobile and New Orleans, with the first vessels arriving in June 2021. This connects the region directly to Taiwan, China, Hong Kong and South Korea.

The Barbour Cut Container Terminal and the Bayport Container Terminal are owned



Houston: volumes are anticipated to rise further for 2021.

Port of Houston

and operated by the Port of Houston, the largest port on the US Gulf, handling nearly 70% of container cargo transiting the region.

In June 2021, the port received \$80m in federal funding towards a \$198m restoration and upgrade

of the 46-year-old Barbour Cut Terminal.

The Houston Ship Channel expansion to deepen and widen the waterway, which hosts more than 200 terminals, is under way as part of a \$1.4bn capital expenditure project to 2025.

Port authority: Port of Houston Authority, 111 East Loop North Houston, Texas 77029, US

Website: www.porthouston.com

Email: questions@poha.com

Terminals (Operators):

Barbours Cut Container

Terminal (Ports America)

Bayport Container Terminal (Ports America)

63 / Melbourne (Australia)

NO CHANGE

Throughput 2020: **2,995,248 teu**, **0.9%** (2019: 2,967,315 teu)

Port results reflect lengthy and restrictive quarantine periods, the toughest and longest of any place in Australia

LAST year's 0.9% rise in port throughput was skewed by the pandemic as restrictions on travel and tourism diverted consumer spending and imports rose, especially from China.

Melbourne was twice subject to lengthy and restrictive quarantine periods that were the toughest and longest of any place in Australia.

More than one-third of Australia's container trade passes through the inner-city port, which was not only subject to severe service interruptions and delays but also took in shipments diverted from the New South Wales Botany port.

Like other ports across Australia's eastern seaboard, Melbourne also had to deal with a backlog of empty containers and repositioning challenges.

Australian consumer spending has proved resilient, with 2021 loaded box imports already showing monthly year-on-year increases on 2019 levels in the port of Melbourne.

Not all disruption was related to the pandemic. The Maritime Union of Australia has yet to resolve industrial and pay demands with many terminals, including Manila-based ICTSI, which owns and has operated the fully automated Victoria International Container terminal at Melbourne's Webb Dock since 2017.



Melbourne: more than one-third of Australia's container trade passes through the inner-city port.

Ric Wallis/Port of Melbourne

The terminal, which can take neo-panamax containerships and is one of three in Melbourne, has cumulatively lost A\$300m (\$226.7m) over this time and "almost broke even" in 2020, its chief executive told Australian media in March.

Disputes here, with other terminals and at other ports resulted in delays and tailbacks in vessel arrivals, with some lines cancelling.

Australia's borders have been closed since early 2020, limiting international flights. This diverted some exports to containerised trades, leading to higher volumes, especially at the year's end.

Early in 2020, the port of Melbourne outlined expansion plans, including the VICT terminal,

while trials took place at other terminals for longer and wider containerships following a dredging programme.

The port released its 2050 Port Development Strategy in October 2020 and two key contracts for the A\$125m Port Rail Transformation Project for new rail infrastructure were awarded last year. Construction is slated for 2021's second half.

Port authority: Port of Melbourne Pty Ltd, GPO Box 2149 Melbourne VIC 3001 Australia

Website: www.portofmelbourne.com

Email: information@portofmelbourne.com

Terminals (Operators):

Swanson Dock East (Patrick Terminals)

Swanson Dock West (DP World Australia)

Webb Dock East international container

terminal (Victorian International

Container Terminal Ltd)

64 / Barcelona (Spain)

11

Throughput 2020: **2,958,040 teu**, **11%** (2019: 3,324,650 teu)

Spanish port is eyeing digital efficiencies in the wake of its Covid-19-induced downturn

THE pandemic-induced downturn peaked in May 2020 for Barcelona, when monthly throughput figures recorded a 34% contraction in containerised traffic compared to 2019 — already a dire year in comparison to recent growth trends.

Yet by November 2020, the rebound had kicked in and the upswing in box traffic has continued to grow into 2021.

While overall throughput volumes ended up 11% down on 2019, a strong end to the year and the positive behaviour of exports — which closed 2020 at the same levels as the previous year — helped stave off what could have been a significantly worse decline.

Despite the impact of Covid-19, the port authority reports “acceptable” cashflow, essential for the self-financing port’s debt servicing and investment plans.

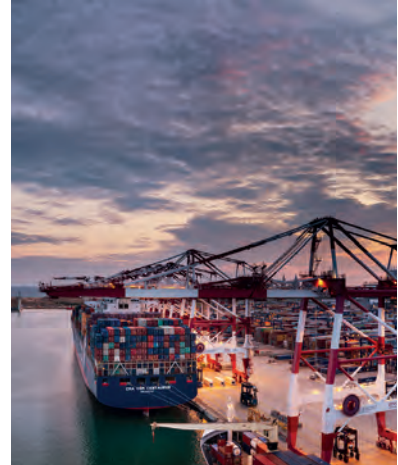
A new rail access project received approval, allowing Barcelona to directly invest in the Spanish rail

network’s next generation of 750 m-long trains connecting Spain’s car manufacturing hubs.

The port’s strategic plan to 2025, meanwhile, is focused on increasing the value of foreign trade — targeting €70bn (\$85bn) by 2025, up from €65bn currently — while reducing emissions via digital efficiency programmes and 50% electrification of its box and ro-ro wharves.

Barcelona’s smart logistics ambitions are also undiminished. The Port of Barcelona’s port community system, Portic, is the first in Spain being integrated with TradeLens, the digital logistics platform based on blockchain technology jointly developed by AP Moller-Maersk and IBM.

This integration involves the exchange of real-time information to provide more details of the loading and unloading operations that occur at the Barcelona port facilities.



Barcelona: positive behaviour of exports helped stave off a significantly worse decline.

Port of Houston

Port authority: Barcelona Port Authority, World Trade Center, Barcelona wharf 08039, Barcelona, Spain

Website: www.portdebarcelona.cat

Email: sac@portdebarcelona.cat

Terminals (Operators):

Barcelona Europe South Terminal (Hutchison Port Holdings)
APM Terminals Barcelona (APMT)

65 / Manzanillo (Mexico)

6

Throughput 2020: **2,909,632 teu**, **5.2%** (2019: 3,069,183 teu)

Mexican port recovers from impact of pandemic in 2020 to rebound in early 2021

MEXICO’S biggest container port kept its fall in volumes to 5.2% during the pandemic year, coming in at 2.9m teu.

Monthly throughput fell from 264,138 teu in January to its nadir of 201,362 teu in March.

It then recovered in May (262,168 teu), dipped again in June (208,604 teu) and peaked at 273,979 teu in October, holding steady to the end of the year.



Manzanillo: container traffic was more resilient than other cargo types in 2020.

Manzanillo Port Authority

Transshipment cargoes made up 943,770 teu for the year, or 32% of throughput, with imports making up 34% at 984,794 teu, and export cargoes 34% at 980,890 teu.

Manzanillo has two specialised container terminals, operated by Contecon and SSA Mexico.

Throughput at the SSA terminal fell 7.5% to below 1.5m teu, while the Contecon terminal fell 1.5% to 971,936 teu for the year.

The port's non-container trades were less resilient: general cargo

tonnage fell 16.4% in 2020 compared with the previous year and automobile cargoes were hammered, falling 61.8% from 21,099 cars to 8,058.

Bulk agricultural and mineral cargoes rose 3.1% and 8.1% for the year, respectively. Overall cargoship and tanker traffic fell 8.4% for the year.

By May 2021, the picture for container traffic at the port of Manzanillo was already tracking 14.7% above the year-earlier period.

Contecon's TEC-II terminal handled its one millionth teu in November 2020. The terminal was set to complete its expansion from 47 hectares to 54 hectares in 2021.

Port authority: Integral Port Administration of Manzanillo: Av. Teniente Azueta No.9, Colonia Burócrata, Manzanillo, Colima, Mexico 28250.

Website: www.puertomanzanillo.com.mx

Email: atencionclientes@puertomanzanillo.com.mx

Terminals (Operators):

Contecon Manzanillo SA (International Container Terminal Services Inc)

Terminal Especializada de Contenedores (SSA Mexico)

66 / Ambarli (Turkey)

11

Throughput 2020: **2,887,800 teu**, **7%** (2019: 3,104,882 teu)

Turkey's biggest port is hit by the pandemic, making it the second consecutive year it experiences lower throughput levels

TURKEY'S biggest port extended a decline in container traffic in 2020, as the coronavirus pandemic dragged business down for Ambarli.

Turkey's economy itself bounced back in the second half of last year, with gross domestic product growing by 1.8%.

However, although imports increased by 4.3%, exports fell by 6.3%, as demand from main markets such as the European Union fell amid economic contractions brought on by the pandemic.

The impact was felt by Ambarli and its box terminals, where annual throughput fell to below 3m teu for the first time since 2017.

Kumport, the terminal run by China Merchants Ports Holding and Cosco Shipping Ports, saw throughput drop by 5% to just over 1.2m teu.

The smaller Mardas terminal also suffered a decline of 18% in 2020, with throughput dropping down to 119,374 teu.

The terminal attributed the decrease to the pandemic and its negative influence on trade movement.



Ambarli: annual throughput fell to below 3m teu for the first time since 2017.

Kumport

Despite the challenging year, Mardas completed construction of a viaduct in 2021 that links the main terminal with the off-dock area. It is also currently extending its berth to 200 m.

The terminal believes it will see throughput increase in 2021, thanks to these investments.

While 2020 proved a challenging year, Ambarli has been a Mediterranean mainstay since Lloyd's List began compiling

its Top 100 Ports and the expectation is that it will continue to be so.

Port authority: Atlas (Ambarli Liman Tesisleri AS), Ambarli Liman Tesisleri, Angurya Cifligi Mevkii, 34904 Yakuplu Buyuk Cekmececi, Istanbul, Turkey

Website: www.altasliman.com

Email: altas@altasliman.com

Terminals (Operators):

West, Main and Limas (Marport Terminals)

Kumport (China Merchants Holdings

(International) and Cosco Pacific)

Mardas (Mardasport)

67 / Chittagong (Bangladesh)

9

Throughput 2020: **2,839,977 teu**, **8%** (2019: 3,088,187 teu)

Bangladesh's principal port reports a significant dip in traffic as the coronavirus outbreak hits its substantial trade of ready-made garments

BANGLADESHI box hub Chittagong saw volumes drop back substantially in 2020, as one of numerous ports where business was hit hard at the hands of the coronavirus pandemic.

A throughput tally of 2.8m teu represented an 8% drop on 2019 figures to firmly put the brakes on a period of sustained growth for Chittagong.

As a result, the port slipped back nine places in a congested middle order to 67th in Lloyd's List's rankings.

Chittagong's rise as a significant destination for containerised trade has come parallel to the growth of the country's ready-made garment industry.

The capital Dhaka, north of Chittagong, is home to vast manufacturing bases for high-street names from across the west, serving the increasing demand for fast fashion.

Factory production slowed dramatically when localised lockdowns to contain the spread of coronavirus came into force in the first half of 2020.

This had a significant impact on the port's full-year tally, which was also hit by the closure of shops overseas selling the country's clothing apparel, in respect of their own lockdown procedures.

However, much of this shortfall in trade was subsequently offset by a surge in online purchases.

Chittagong's exports have picked up in 2021, in line with the wider recovery of global trade.

During the first six months of this year, exports were up



Chittagong: addition of new capacity cannot come soon enough.

Muhammad Mostafigur Rahman/Alamy Stock Photo

just shy of 8% on the second half of 2019, according to the Chittagong Port Authority.

Yet as trade returns to 'normal', it is Chittagong's age-old issues of a lack of capacity and creaking infrastructure that continues not only to halt the port's progress, but Bangladesh's booming garment trade too.

The Patenga Container Terminal, Chittagong's third box facility, is scheduled to open for business in 2022.

It was agreed in principle earlier this year that PCT will be operated under a public-private partnership — a factor that will not have escaped the long queue of international port operators chomping at the bit to get a foothold in Bangladesh.

The first phase of PCT will see an additional 400,000 teu added to Chittagong's capacity, although this still falls way short of requirements.

Despite handling close to 3m teu in 2020, Chittagong is fundamentally designed for volumes closer to 2m teu.

PCT will be joined by a host of other new port developments in the near future, including the much-anticipated Bay Terminal complex.

According to local reports, PSA and DP World have already made their interest clear in Bay Terminal.

However, as it stands, it is not expected to welcome the arrival of its first vessel until 2026 at the earliest.

For Chittagong, the addition of new capacity cannot come soon enough.

Port authority: Chittagong Port Authority, Bandar Bhaban, Chittagong-4100, Bangladesh

Website: www.cpa.gov.bd

Email: secretary@cpa.gov.bd

Terminals (Operators):

Chittagong Container Terminal (Chittagong Port Authority)

New Mooring Container Terminal (Chittagong Port Authority)

68 / **Virginia** (United States)

▲ 3

Throughput 2020: **2,813,415 teu**, ▲ 4.2% (2019: 2,937,962 teu)

Volumes are not initially what the port had hoped for, but record-setting levels are seen in the later months of the year

THE effects of the coronavirus pandemic on world trade had a significant impact on the port of Virginia's 2020 cargo volumes as the facility saw a dip of 4.2% in its overall levels for the year.

"Our volumes for 2020 are not what we had hoped for initially, but we finished the year without any interruptions in our operations and saw record-setting volumes in October, November and December," said John Reinhart, chief executive and executive director of the Virginia Port Authority.

The turn in Virginia's fortunes came in July, with a 5% increase in throughput over June, rising to 221,028 teu from 210,669 teu.

In September, the port saw its first actual improvement over 2019 figures as throughput reached 256,439 teu over the previous year's 241,416 teu.

"Volumes slowed as the blank sailings mounted. We saw what was happening, we met the issue

head-on and began to make the necessary adjustments in the operation," Mr Reinhart said.

The adjustments included modifications to the port's operating hours; prioritisation of Covid-19-related cargo; creation of temperature-screening stations at terminals; and efforts to sanitise common spaces and equipment multiple times each day.

"The hard work was worth it," Mr Reinhart said. "We did not lose a single day of productivity as the result of Covid and, during the last quarter of the year, processed record amounts of cargo without issue. This is a real testament to this team."

One of the biggest changes came in 2020 when the VPA board of commissioners introduced Stephen A. Edwards as the port's next leader, starting in 2021, following Mr Reinhart's retirement after seven years at the helm.

Mr Edwards previously served as president and chief executive of



Virginia: port did not lose a single day of productivity to the coronavirus pandemic.

Port of Virginia

TraPac, LLC, operator of container terminals in Los Angeles, Oakland and Florida, and as chief executive of Global Container Terminals in Canada.

Port authority: Virginia Port Authority, 600 World Trade Centre, Norfolk VA 23510, US

Website: www.portofvirginia.com

Email: POVCustomerService@vit.org

Terminals (Operators):

Virginia International Gateway

(Virginia International Terminals)

Norfolk International Terminal

(Virginia International Terminals)

69 / **London** (United Kingdom)

▲ 1

Throughput 2020: **2,772,000 teu**, ▼ 0.6% (2019: 2,790,000 teu)

Container terminals expect to benefit from the Thames Freeport economic zone that is being set up

THE Port of London is dominated by two major container-handling facilities, one located at long-established Tilbury, and the other operated by relative newcomer London Gateway.

After a difficult start as DP World's London Gateway lured customers away from Forth Ports' London Container Terminal at

Tilbury, the pair now have a better working relationship.

That is evidenced by their joint participation in the Thames Freeport initiative, along with the Ford Motor Co, Port of London Authority and other local businesses, that could be open by early 2022.

Thames Freeport is one of eight special economic zones announced

by the UK government in March 2021, which will benefit from reduced red tape.

Like many ports, London had a bumpy ride in 2020, with container volumes initially hit by lockdowns across the world as the pandemic spread, followed by the huge increase in consumer demand that sent throughput numbers spiralling.



London: firmly established as a top container port, thanks to several River Thames terminals including Tilbury (above) and London Gateway.
Forth Ports

Total traffic handled by container terminals along the Thames within the PLA's jurisdiction — including facilities operated by Cobelfret, plus Ford Dagenham Terminal, as well as the big two — was down very slightly in 2020, at just under 2.8m teu.

However, London Gateway reported year-on-year growth of 8% to almost 1.6m teu.

Tilbury handled 740,000 teu of lo-lo and ro-ro container traffic in 2020, down from 2019 levels,

However, in the early months of 2021, volumes were 20% ahead year on year, and also up on 2019, reflecting both organic growth and new services.

Tilbury has been more caught up in the Brexit fallout than many UK ports, with trade between Britain and European Union countries accounting for up to 70% of its traffic.

The diversified port saw a surge in inbound cargo ahead of the UK's formal departure from the EU, as importers stockpiled.

Coming at a time when the UK was being hit hard by Covid-19 and the emergence of the so-called Kent variant, the final quarter of 2020 was particularly challenging, with absentee levels rising as infections spread.

The impact of Brexit has continued well into 2021, with the dwell time of containers on

the terminal remaining much higher than usual, partly reflecting customs clearance issues but mostly because inland distribution centres and warehouses remained overstretched.

Tilbury, which handles ships of up to 10,000 teu, has benefitted from a greater volume of transshipment cargo from Rotterdam as the bigger UK container ports struggled with congestion. More shipments were diverted from the congested Dover-Calais and Eurotunnel crossings.

Although many lower-value commodities, such as lumber and plywood, switched back to breakbulk as container freight rates soared, Tilbury did not lose cargo but instead was able to handle the business at one of its other berths.

Indeed, the multimodal port has seen a boom in building materials as construction work continued through the pandemic, much of which has been decontainerised — at least for now.

For Forth Ports' London property, a highlight of 2020 was a 25-year partnership signed between Tilbury and the construction business Tarmac to develop the UK's largest building materials aggregates terminal at its new £250m (\$347.6m) Tilbury2 development.

Further down the Thames at London Gateway, DP World is still planning for a fourth berth as it moves ahead with its long-term goal of up to six berths.

Port-centric logistics remains the order of the day, with demand so buoyant that DP World announced in March 2021 that it would fast-track completion of a speculative 146,000 sq ft green warehouse facility to meet the rapidly growing need for space at London Gateway's logistics park.

Recent new customers include banana supplier Compagnie Fruitière UK, which is leasing a 69,718 sq ft ripening facility.

Another new tenant is DHL, which plans to move into a bespoke 482,000 sq ft warehouse in early 2023.

London Gateway, which can handle the world's largest boxships, continues to expand port capacity, with an additional 40 workers taken on in mid-2020, and more space made available in its storage yard for another 8,000 empty containers.

Port authority: Port of London Authority, London River House, Royal Pier Road, Gravesend, Kent DA12 2BG, UK

Website: www.pla.co.uk

Email: info@pla.co.uk

Terminals (Operators):

London Gateway (DP World)

London Container Terminal, Tilbury (Forth Ports)

Ford Dagenham Terminal (Ford Motors)

C.RO Ports Purfleet (Cobelfret)

C.RO Ports Dartford (Cobelfret)

70 / Yokohama (Japan)

9

Throughput 2020: **2,661,622 teu**, **11%** (2019: 2,990,000 teu)

Port's exports are hit by a drastic slowdown in demand for Japanese-branded automobiles

YOKOHAMA, the home city of Nissan, saw its container throughput plummet 11% last year on slower automobile exports.

The port handled more than 2.6m teu of containers in 2020, down from just under 3m teu a year earlier.

Its exports shrank 10.5% to below 1.3m teu as shipments of autoparts and components contracted 26.1% and those for completed automobiles fell 10%.

China, as the largest market for Nissan cars, imposed economic lockdowns that compromised its automobile demand from January through to April 2020.

Nissan was subsequently held back by a global shortage of automotive chips and could not capitalise on a rebound in Chinese demand from last May.

Yokohama exported almost 3.3m tonnes of cargo to China, down 1.4%.

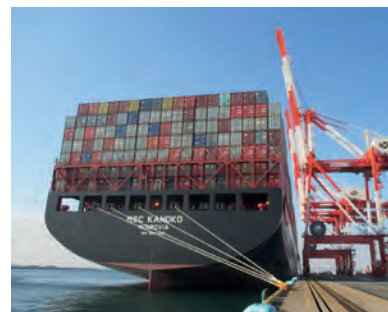
Its exports to Thailand, another major market and production base for Nissan, also fell 18.5% to below 1.2m tonnes.

Nissan has warned the chip shortage would force it to produce 250,000 fewer vehicles from the current fiscal year through to March 2022.

Yokohama's imports plunged 10.8% during the first pandemic-hit year as inbound containerised cargoes from Japan's major trade partners, China, the US, Thailand and Australia, fell between 7% and 13.9%.

Maersk chose to void sailings of the transpacific TP1 service connecting the North American west coast to Yokohama and other ports in the Far East during the first half of last year.

The shipping group, which operates a deepwater terminal at the port city, attributed the decision to lockdowns at Chinese



Yokohama: home city of Nissan saw its container throughput plummet.

APMT

ports during January to April and lower shipping demand linked to the coronavirus-led economic disruption.

Port authority: Yokohama Kawasaki International Port Corporation (YKIP)

Website: www.ykip-eng.com

Email: sakura.kuma@ykip.co.jp

Terminals (Operators):

MC1 and MC2 (APM Terminals)

D4 (APL)

D5 (MOL and local operators)

71 / Kobe (Japan)

4

Throughput 2020: **2,647,066 teu**, **7.8%** (2019: 2,871,642 teu)

Japanese port battles intra-Asia trade disruption to post a decline in box volumes

KOBE'S box volumes slipped 7.8% to 2.6m teu, hammered by vast trade disruption from the coronavirus pandemic in 2020.

The port handled a significantly lower volume of automobile parts and industrial machinery, one official told Lloyd's List.

Japan's auto sales also fell when demand from China and the US faltered.

China headed into economic lockdown from January to April, which saw hundreds of



Kobe: container trade was dented by slower exports to the US.

Bogomyako/Alamy Stock Photo

thousands of businesses and factories shuttered during the first quarter.

Kobe bore the brunt because it has a large exposure to intra-Asia trades.

Shipping line SITC operates 13 express and direct services connecting Kobe to 11 mainland Chinese ports.

Kobe's international container trade was also dented by slower exports to the US, which carried through to early 2021.

The Japanese port city ranked as the third-largest exporter to the US, behind Tokyo and Nagoya last year, according to

American research firm, Decartes Datamyne.

Its containerised exports to the US, which shrank 4.4% on year in 2020, plunged by 45.3% in February 2021 but have since staged a dramatic rebound, with a 69.3% increase in April.

Kobe features alongside Tokyo and Nagoya on ONE's FP1 transpacific service linking the Japanese cities with Los Angeles and Oakland in the US.

Notwithstanding the pandemic-linked damages, the port remains committed to adapting its infrastructure to changing market requirements,

such as berthing of the now upsized mega container vessels, an official said.

Port authority: Port and Urban Projects Bureau, City of Kobe, 6-5-1 Kano-cho, Chuo-ku, Kobe, 650-8570, Japan

Website: www.city.kobe.lg.jp

Email: kobeport@office.city.kobe.lg.jp

Terminals (Operators):

Port Island Terminals:

PC13 (Kamigumi/Sumitomo

Warehouse/Nickel & Lyons)

PC14 (Nissin)

PC15, PC16 and PC17 (Shosen Koun/

Sankyu/Sumitomo Warehouse)

PC18 (Kamigumi)

Rokko Island Terminals:

RC2 (Mitsui-Soko)

RC4 and RC5 (Nitto Total Logistics/

Mitsubishi Logistics/Shosen Koun)

RC6 and RC7 (Nippon Container

Terminals/Mitsubishi Logistics/Uni-X)

72 / Durban (South Africa)

NO CHANGE

Throughput 2020: **2,595,402 teu**, **▼ 6.3%** (2019: 2,769,869 teu)

South African port sees further declines in throughput, though it re-ignites a desire to expand capacity under a 10-year plan

CONTAINER throughput at Durban port continued to decline in 2020, with a total of 2.6m teu handled.

Almost 2m teu were full containers, while the rest were categorised as empties, according to official port authority figures. The total shipped was slightly higher than the imports.

Durban accounted for 64% of all South African container port volumes, which amounted to 4.1m teu, statistics show.

The drop in total throughput comes as the Durban port has been dogged by congestion and inefficiencies, although some improvements have been made in terms of turnaround times.

Through the injection of new equipment, including 23 straddle carriers, the terminal has managed to increase its working gangs at Pier 2 to 13 from 11, which eases the flow of both vessels and trucks.

According to media reports, South Africa has reignited a \$7bn

plan to expand and modernise the port as it fell to third place in Africa, after Tangiers in Morocco and Port Said in Egypt.

The country's president, Cyril Ramaphosa, is seeking private sector participation in the project, which is expected to last a decade.

Transnet, the country's custodian of ports, rail and pipelines, will sign a concession later in 2021 with a private company to build and operate a new terminal in the Point Precinct, which will improve the efficiency of container handling, he noted.

The Durban port modernisation scheme will also include the deepening of the Maydon Wharf channel to allow larger, more modern vessels to enter the port, along with the infill of Pier 1 and Pier 2 to create additional capacity for containers.

Once completed, container handling capacity will increase from 2.9m teu to more than 11m teu. At least, that's the plan.



Durban: improvements have been made in terms of turnaround times.

Transnet

Port authority: Transnet, P.O. Box 32696, Braamfontein, 2017, South Africa

Website: www.transnetnationalportsauthority.net

Email: tptcallcentre@transnet.net

Terminals (Operators):

Pier 1 (Transnet Port Terminals)

Pier 2 (Transnet Port Terminals)

73 / Genoa (Italy)

71

Throughput 2020: **2,498,850 teu**, **▲ 6.4%** (2019: 2,669,917 teu)

Italian port is gunning for the northern European market, boosted by a new terminal, restored bridge and forthcoming rail link to Rotterdam

IF THERE'S one thing of which nobody can accuse Genoa, it's lack of ambition.

Despite being physically located in Italy, the ports complex — which includes Genoa itself, Savona and Vado Ligure — believes it can compete with the mighty north continent range.

This will be made possible by a rail link between Genoa and Rotterdam, planned from 2024, which the port authority's leadership believes will enhance competitiveness in northern Europe, and take 15%-20% of the northern Europe domestic market.

Boosting those efforts will be the newly built and Mediterranean Shipping Co-owned Calata Bettolo Container Terminal, which handled its first ship at the end of May 2020.

However, it will not be fully operational until publicly funded work on a breakwater is completed, which seems sets to take a year or two yet.

Also of crucial importance is the Viadotto Genova-San Giorgio, a motorway viaduct opened last August to replace the Ponte Morandi, which collapsed so spectacularly in 2018.

The Genoa port complex has traditionally positioned itself as

primarily a gateway facility for industrialised northern Italy, rather than a transshipment point; it handles almost one-third of the Italian container market.

Port authority: Western Ligurian Sea Port Authority, branded as the Ports of Genoa: Palazzo San Giorgio, Via della Mercanzia, 2, 16124 Genoa, Italy

Website: www.portsofgenoa.com

Email: info@portsofgenoa.com

Terminals (Operators):

Vado Gateway (APM Terminals)

PSA Genova Pra (PSA)

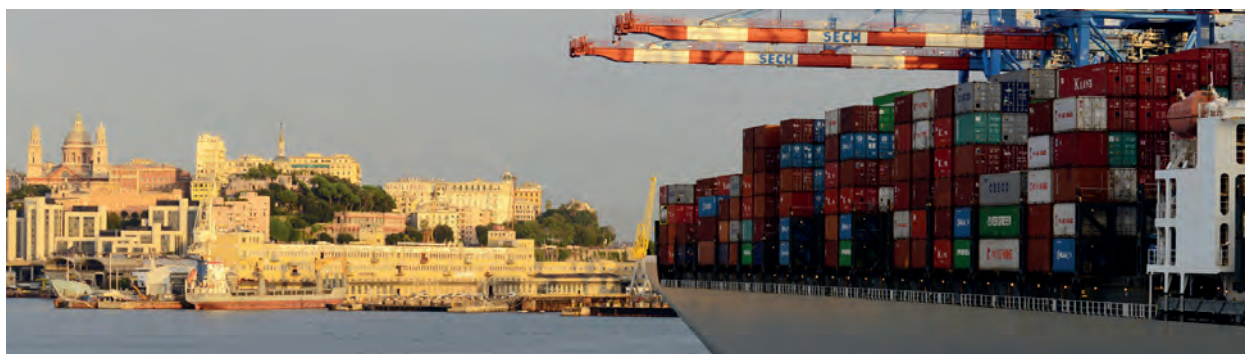
Terminal Contenitori Porto di Genova, also known as South European Container Hub (Gruppo Investimenti Portuali)

Calata Bettolo Container Terminal (Bettolo consortium, including MSC)

Messina Terminal (Messina Line)

TSG Terminal San Giorgio (Gavio Group)

GPT Genoa Port Terminal (Spinelli Group)



Genoa: positioned itself as primarily a gateway facility for industrialised northern Italy.

PSA SECH

74 / Nagoya (Japan)

6

Throughput 2020: **2,471,146 teu**, **▲ 13.1%** (2019: 2,844,004 teu)

Slower sales in the US and China — the two largest markets for Japanese-built automobiles — exert a toll on box trade

NAGOYA'S container trade took a beating from the coronavirus-triggered slowdown hitting Japan's top trading partners, tumbling 13.1% to below 2.5m teu

last year. Its outbound and inbound containerised cargoes to and from China and the US shrank in 2020.

Exports to China and the US tumbled 11% and 10.1%,

respectively, to 4.6m tonnes and 2.9m tonnes. Imports from China and the US likewise fell 9.1% and 6.5% to 9.5m tonnes and 1.2m tonnes, respectively.



Nagoya: box volume staged a recovery during the first six months of 2021.

Nagoya United Container Terminal

The US and China are the largest markets for Japan's auto makers, which also account for the bulk of Nagoya's exports.

However, the coronavirus pandemic has damaged automobile demand in China and the US, even though a rebound was in sight during the second half of last year.

Nagoya's exports of completed automobiles fell 25.3% to below 1.5m tonnes in 2020. It exported almost 7.9m tonnes of automobile parts, down 21.4% on year.

Yet Japan's top automakers, Toyota Motor and Mazda, posted their first monthly increases in auto sales to China as early as April, signalling the start of a turnaround.

Japan's auto shipments to the US rebounded later in the second half of the year.

Nagoya's box volume staged a recovery during the first six months of 2021, posting growth for three straight months from February to April.

The recovery in its container trade, however, is clouded by one overhang holding back Japan's auto manufacturing industry.

Struck by a global auto chip shortage, top Japanese brands — Toyota and Nissan included — were forced to cut back on production, despite a demand uptick in China and the US.

Port authority: Port of Nagoya, 1-11 Minato-machi, Minato-ku, Nagoya, 455-0033, Japan

Website: www.port-of-nagoya.jp

Email: info@port-of-nagoya.jp

Terminals (Operators):

Tobishima Pier South (Nagoya United Container Terminal*)
Tobishima Pier North (Nagoya United Container Terminal*)
NCB Terminal (MOL, K Line, NYK and Nagoya United Container Terminal*)
Nabeta Pier (Nagoya United Container Terminal*)
Tobishima Pier South Side (TCB**)

**Nagoya United Container Terminal is a joint venture formed by Asahi Unyu Kaisha, Fujitrans, Isewan Terminal Service, Kamigumi, Meiko Trans, Mitsubishi Logistics, Mitsui-Soko, Nippon Express and Tokai Kyowa*

***TCB is a joint venture comprising Asahi Unyu Kaisha, Fujitrans, Isewan Terminal Service, Kamigumi, K Line, Meiko Trans, MOL, NYK, Tobishima Logistics Service and Tokai Kyowa*

75 / Oakland (United States)

▲ 4

Throughput 2020: **2,461,262 teu**, ▼ **1.6%** (2019: 2,500,461 teu)

New maritime director is appointed as the pandemic has an impact on throughput

PERHAPS the most important development for the Port of Oakland in 2020 was the appointment of Bryan Brandes as maritime director, coming on board as the pandemic was impacting throughput at ports across the nation and around the world.

"Bryan is coming in at a crucial time for us and we're eager to put his skill and industry experience

to work," said Port of Oakland executive director Danny Wan.

"He knows the players, knows the business and knows what it takes for us to succeed."

Between January and June 2020, Oakland's cargo volumes lagged behind those of the same period in 2019.

However, July brought a slight uptick, as volume rose to

219,080 teu from 218,191 teu the year earlier.

Volumes continued to climb in August, September and October, but hit a bump in November as the growing backlog of ships to the south in Los Angeles and Long Beach slowed their sailings north to Oakland.

In particular, higher numbers of ships at the two southern California

ports and the resulting vessel delays for ships heading north contributed to fewer containers than expected coming through Oakland in November.

Mr Brandes said the solution for Oakland was to become a first

port of call, bypassing southern California's delays altogether — a solution that soon materialised as CMA CGM launched a premium service to Oakland from Yantian.

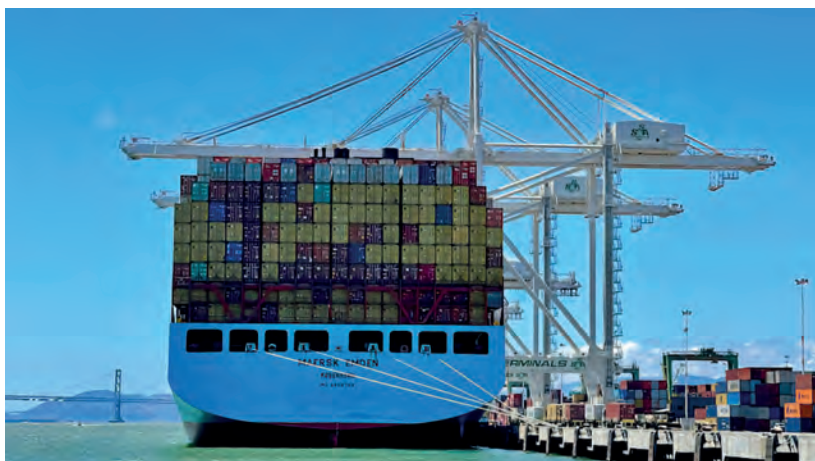
CMA CGM said its Seapriority Express (SEA-X) service would

provide priority vessel space and equipment release in Yantian, starting February 12, 2021.

The port rotation on the SEA-X service is Yantian, Oakland, Seattle, Shanghai and Yantian.

Meanwhile, in anticipation of even larger ships and more cargo, the port of Oakland received three new ZPMC cranes in 2020.

It began installing them for service by Stevedoring Services of America at its Oakland International Container Terminal, to begin in 2021.



Oakland: ordered three new ship-to-shore cranes in 2020.

Port of Oakland

Port authority: Port of Oakland, 530 Water Street, Oakland, CA 94607

Website: www.portofoakland.com/port

Email: marineinfo@portofoakland.com

Terminals (Operators):

TraPac Terminal (TraPac)

Ben E. Nutter Terminal (Everport Terminal Services)

Oakland International Container Terminal (Stevedore Services of America)

Matson Terminal (Stevedore Services of America)

76 / **Marsaxlokk** (Malta)

▼ 3

Throughput 2020: **2,441,589 teu**, ▼ **10.3%** (2019: 2,722,889 teu)

Despite a fall in throughput, the port maintains investments in efficiency measures and digitalisation, attracting new container line services

MALTA Freeport continued to operate at well below capacity in 2020 as annual container volumes again declined, albeit at a slower pace than in 2019.

The transshipment hub, which is jointly-owned by some of the biggest names in shipping, suffered from the effects of the pandemic which hit the container shipping industry in the first half of the year, plus fierce competition in the Mediterranean.

Throughput dropped by nearly 300,000 teu to 2.4m teu compared with 2019, and remains well below the 3.3m teu achieved in 2018.

That compares with capacity to handle up to 3.8m teu annually, and plans to expand to 4m teu.

The 2020 drop in traffic was reflected in considerably fewer



Marsaxlokk: experienced a total of 50 blank sailings since the Covid-19 outbreak in 2020.

Malta Freeport

ship calls, as up to 50 sailings were blanked in the early months of last year when lines cancelled services in the Asia-Europe trades because of the slump in cargo demand. That situation was dramatically reversed in the latter half of 2020 which continued into 2021.

Regardless of market conditions, Malta Freeport has the support of one particularly powerful customer, CMA CGM, which is also a major shareholder in the Marsaxlokk facility.

The terminal is jointly-owned by Robert Yildirim's Yilport and Terminal Link, the port operating joint venture in which CMA CGM

has a 51% stake and China Merchants owns 49%. Mr Yildirim has a 24% shareholding in French line CMA CGM.

But other users include Mediterranean Shipping Co, while Japanese-owned line Ocean Network Express inaugurated calls in March 2021.

One of the highlights of 2020 was the arrival of the 23,100 teu CMA CGM Jacques Saadé, the world's largest containership fuelled by liquefied natural gas, on its maiden voyage from Asia to Europe.

The site was established in 1998 to develop the port

of Marsaxlokk, and then privatised in 2004 when CMA CGM was granted the operating concession. Since then, over €300m has been invested in Malta Freeport Terminals' facilities which include 2.4 km of deepwater quays and equipment able to handle 24,000 teu ships.

Port authority: Malta Freeport Terminals, Freeport Centre, Port of Marsaxlokk, Kalafrana BBG3011, Malta

Website: www.maltafreeport.com.mt

Email: marketing@maltafreeport.com.mt

Terminals (Operator):

Marsaxlokk container terminals (Malta Freeport Terminals)

77 / Le Havre (France)

8

Throughput 2020: **2,417,000 teu**, **↓ 14.4%** (2019: 2,822,910 teu)

New boss at the number one French box port wants to expand its container import market share

FRANCE'S largest container port Le Havre admits to having had a tough time in 2020, with a 14.4% drop in box throughput.

This is in large part down to the pressure of coronavirus, even though it remained operational throughout the lockdown.

The decline compounds a 4.5% drop recorded in 2019, largely as a result of industrial action by port workers protesting against pension reform.

Loyal customers were given a one-off commercial rebate on port fees in January and February 2020, to compensate for the inconvenience.

However, the good news is that growth resumed in the third quarter and, by the fourth quarter, box throughput had returned to levels seen in 2018, itself a benchmark year.

Le Havre has long been linked to Rouen and the river port of Paris under a port authority known as Haropa and, on June 1, 2021, the three ports became a single entity from a legal point of view.



Le Havre: growth resumed in the third quarter of 2020.

Haropa

Haropa's president Stéphane Raison did the rounds of major French newspapers prior to the merger.

He expressed himself strongly dissatisfied that half of containerised imports to France are currently handled by non-French ports, which indicates a desire to take on the north continent range and perhaps even Genoa.

A seven-year investment programme to the overall value of €1.45bn (\$1.73bn) commenced last year, and Haropa will also get

government support to the tune of €71m to help make it more environmentally friendly.

Port authority: Haropa, Terre plein de la barre, BP 1413 – 76067, Le Havre

Website: www.haropaports.com

Email: marie.heron@haropaports.com

Terminals (Operators):

Port 2000:

Terminal de France, GMP (Générale de Manutention Portuaire)

Terminal de la Porte Océane (Perrigault)

Terminaux de Normandie (Perrigault & MSC)

Terminaux Nord container terminals:

Terminal de l'Atlantique (Compagnie Nouvelle de Manutention Portuaire)

North Terminal (GMP)

78 / Sydney (Australia)

2

Throughput 2020: **2,395,773 teu**, **0.2%** (2019: 2,401,434 teu)

Bitter labour disputes cause severe disruptions at the Australian port and weigh on throughput volumes

AUSTRALIA'S waterfront has long been a political battleground — and so it proved in 2020 for Sydney's Port of Botany, where bitter labour disputes impacted throughput volumes.

Industrial action against the country's largest terminal operators, taken by the Maritime Union of Australia, caused severe interruptions at Sydney's ports last year.

It also exhumed memories from 1998, when terminal operator Patrick Corporation illegally attempted to break union control on the wharves.

Intermittent strikes exacerbated congestion and delays arising from the already costly and substantial logistics challenges presented by the global pandemic.

Cancelled sailings from China earlier in the year led to capacity constraints, heightened by an imbalance in container trades.

Backlogs developed as empty boxes piled up, and exporters struggled for slots amid a severe land-storage shortfall.

During 2020, ships diverted to the southern port of Melbourne to discharge cargoes, with boxes transhipped to Sydney to ease congestion, which remained problematic into the second half of 2021.

Despite this, the global retail restocking splurge saw volumes rebound at the Port of Botany during the first four months of 2021.

Although throughput dropped in 2020 for a second consecutive year, combined figures for the January-through-April period in 2021 are higher than comparable months of data going back to 2016, according to New South Wales transport department figures.

Latest numbers show teu gains of 18.3% compared to the first

four months of 2020 and 12.9% for 2019.

This suggests the suspension of industrial action at Sydney's container terminals, which weighed on throughput growth in late 2020, alongside stronger consumer spending, helped place port volumes on a more stable footing.

In June 2021, industrial action had recommenced at the Patrick Terminal, spilling over to Melbourne and another fully automated, ICTSI-operated terminal in the Victorian state.

Port authority: NSW Ports, Level 4, 20 Windmill Street, Walsh Bay, NSW 2000, Australia

Website: www.nswports.com.au

Email: enquiries@nswports.com.au

Terminals (Operators):

Sydney Autostrad (Patrick Stevedores)

Brotherson Dock, north side (Patrick Stevedores)

Brotherson Dock, south side (DP World Australia)

Hayes Dock (SICTL, Hutchison Ports Australia)



Sydney: ships were diverted and boxes transhipped from Melbourne to ease congestion.

DP World Australia

79 / Osaka (Japan)

71

Throughput 2020: **2,352,250 teu**, ▼ **4.2%** (2019: 2,456,028 teu)

Japanese port seeks to fend off consecutive waves of coronavirus that threaten trade recovery

OSAKA'S box volume contracted 4.2% on year to less than 2.4m teu as the still ongoing battle to contain the coronavirus pandemic took a toll on its trade with the US and China.

Slower exports of semi-conductors and electric appliances, respectively to China and the US, may have contributed to the decline in container trade in 2020, one port official suggested.

Imports of clothing and accessories, which are often shipped from China to Japan, have likewise contracted, the official added.

Osaka's international container trade tumbled 35% on month in February, overlapping with an extended festive season closure of factories in China, which were imposed by authorities to contain the spread of coronavirus.

Chinese manufacturers have since bounced back to life, supporting the resumption of more than a dozen daily services connecting ports in the world's second-largest economy with Osaka.

Yet Osaka has seen another surge in coronavirus infections, which cloud the recovery of its trade and economy.



Osaka: battle to contain the pandemic took a toll on trade with the US and China.

Osaka Ports & Harbors Bureau

Its governor caved into pressure from the resurging infections to request in June 2021 an extension on the state of emergency once again imposed on the beleaguered port city.

Preliminary data released by Osaka's port authority showed international container trade throughput fell 7% on year in April on an 11% contraction in exports and a 5% decline in imports.

For the first four months of 2021, the port handled 679,813 teu of throughput for international trade, up 5% from last year.

Port authority: Port and Harbor Bureau, City of Osaka, ATC 10F, 2-1-10, Nanko-Kita, Suminoe-ku, Osaka 559-0034

Website: www.city.osaka.lg.jp/contents/wdu020/port

Email: na0004@city.osaka.lg.jp

Terminals (Operators):

Sakishima C-1 (Tatsumi Shokai, Yusen Koun)
Sakishima C-2 (Shosen Koun, Tatsumi Shokai)
Sakishima C-3 (Tatsumi Shokai, Mitsui Warehouse Terminal Service)
Sakishima C-4 (Tatsumi Shokai, Sankyu)
Sakishima C-8 (Nitto Total Logistics, Kamigumi)
Sakishima C-9 (Mitsubishi Logistics, Kamigumi, Sankyu, Mitsui Warehouse Terminal Service)
Yumeshima C-10 (Dream Island Container Terminal)
Yumeshima C-11 (Tatsumi Shokai, Shosen Koun)
Yumeshima C-12 (Dream Island Container Terminal)

80 / Charleston (United States)

71

Throughput 2020: **2,309,995 teu**, ▼ **5.2%** (2019: 2,436,185 teu)

The South Carolina maritime community works tirelessly to remain fully operational as the pandemic has an impact on volumes

THE South Carolina maritime community worked tirelessly to remain fully operational

and keep freight moving at the port of Charleston in 2020, as the global pandemic

disrupted supply chains and impacted volumes in the spring and summer.

The second half of 2020 saw an unprecedented cargo boom, as Charleston saw month after month of record volumes and surging retail imports, including its strongest December on record.

Despite the pandemic, SC Ports continued to grow its cargo base in 2020, including attracting the world's largest retailer, Walmart, to build a near-port distribution centre aimed at moving goods through the port.

Walmart broke ground on its 3m sq ft distribution centre in December 2020.

Advanced manufacturing — especially vehicles, tyres and auto parts — remained a core business segment.

SC Ports continually moved more retail and home goods imports, while exporting more transload commodities, such as refrigerated grocery goods and agriculture products.

It remained focused on enhancing port infrastructure to offer more capacity to customers at a time when it is sorely needed, amid unprecedented cargo increases.

In 2020, SC Ports continued to build the Hugh K. Leatherman



Charleston: second half of 2020 saw an unprecedented cargo boom.

English Purcell/SCPA

Terminal, which adds another berth and 700,000 teu of capacity to the east coast port market.

The state-of-the-art terminal has modern cranes, efficient operations and a 1,400 ft berth capable of handling 20,000 teu ships.

Coming online in March 2021, Leatherman is the first greenfield container terminal to open in the US since 2009.

SC Ports also continued to add capacity and big-ship capabilities at Wando Welch Terminal, as well as expand capacity at rail-served Inland Port Greer.

The Charleston harbour-deepening project remains on track to achieve a depth of 52 ft in the harbour in 2022, making it the deepest harbour on the US east coast.

The project is fully funded with state and federal funding.

Port authority: SC Ports Authority, 200 Ports Authority Drive, Mount Pleasant, SC 29464

Website: www.scspsa.com

Email: scspainfo@scpsa.com

Terminals (Operators):

Wando Welch Terminal (SCPA)

North Charleston Terminal (SCPA)

Hugh K. Leatherman Terminal (SCPA)

81 / Quanzhou (China)

6

Throughput 2020: **2,260,000 teu**, ▼ **12.4%** (2019: 2,580,000 teu)

The Fujian province port is hit by a slowdown in domestic trade and deteriorating cross-straits conditions

THE shift in strategy that benefitted Quanzhou port in 2019 has proved to be a double-edged sword in 2020.

The combined effect of a slowdown in domestic trade due to the coronavirus outbreak and deteriorating cross-straits conditions led to a 12.4% drop in throughput.

Quanzhou also saw a drop in placings as other ports that gained from the recovery spike in the latter half of the year overtook it.



Quanzhou: overtaken by other ports that gained from the recovery spike in the latter half of the year.

Xinhua/Alamy Stock Photo

Now part of the Fujian Port Group that consolidates the major ports in Fujian province, Quanzhou continues to plug away at the domestic and intra-Asia trade, dutifully fulfilling its assigned role as the domestic container hub.

During the course of the year, China's Ministry of Transport announced that Quanzhou has started offering subsidies for container lines doing direct services to Taiwan.

This is apparently with an eye on taking advantage of what is believed to be a growing niche trade, current geopolitical tensions notwithstanding.

Looking to Kaohsiung's wide international network, it was envisaged that Quanzhou could establish a less-than-container-load (LCL) logistics platform that would boost volumes by 100,000 teu a year. This plan seems to have met with little success, judging by the year's performance.

There are also ambitions to "improve the level of open co-operation" with Southeast Asia, south Asia, west Asia and North Africa, in line with official Belt and Road messaging.

However, little in the way of specifics has been disclosed, while other ports have also been asked to support the national initiative.

Nevertheless, the port keeps trying. Domestic carrier Tradewind Shipping added a new Shandong route, while Trans-Asian Shipping increased capacity and added a service to Ningbo-Zhoushan.

Meanwhile, infrastructure work continues on the second phase of the Weitou Bay Shijing Channel Project, which will open up the Shijing New Port Area to larger container vessels and provide more direct access to cross-straits routes.

The newer terminal on the Shijing River, southwest of the more established Cosco-operated terminal in Shihu, already has two

new berths completed, which have 600,000 teu in capacity.

Shihu, meanwhile, now has five berths, including one post-panamax berth, and has another two berths under construction.

Upon completion of the expansion project in 2022, total quay length will be extended to 2,200 m.

Quanzhou's place within the new port group's plans is clear — but how this will affect its future performance will be a function of both the wider economic environment and national policies in China, which may result in greater domestic economic activity.

Port authority: Quanzhou Port Administrative Bureau, 10 - 11/F, Waidai Building, Tian An Nan Road, Fengze District, Quanzhou, Fujian Province, China

Website: www.fjgh.gov.cn

Email: qzgjkc@163.com

Terminals (Operators):

Quanzhou Pacific Container Terminal (Cosco Shipping Ports and Quanzhou Harbour Group)
Hou Zhu Terminal (Quanzhou Harbour Group)
Quanzhou Shenhu Terminal (Quanzhou Harbour Group)

82 / Callao (Peru)

1

Throughput 2020: **2,250,827 teu**, **▲ 2.7%** (2019: 2,313,907 teu)

Peru's largest container port is hit by Covid-19 but rebounds fast, with higher fruit export throughput and strong imports

CALLAO port throughput in 2020 was slightly affected by the coronavirus pandemic, mainly during the second quarter of the year, when Peru faced a very strict Covid-19 lockdown.

The greatest impact was on industrial exports. However, recovery was very fast, in spite of political tensions in late 2020.

Callao closed the year at less than 2.3m teu, a drop of 2.7% compared with the previous year.

The recovery trend continued in the early months of 2021, with first-quarter throughput presenting a 10% growth compared to the same period in 2020.

This was boosted by fruit exports (grapes, avocados, citrus and blueberries, among others) and strong inbound volumes, driven by strong consumption levels, despite Covid-19 continuing to severely impact Peru's population.

The main container terminal operator, DP World Callao, which handled more than 60% of the port's containerised throughput, is moving ahead quickly with expansion works in order to build a third berth and increase capacity by about 50%.

The expansion will add 400 m of quayside, reaching a total of 1,050 m, as well as a further 12 hectares of yard, three additional



Callao: DP World handles 60% of the port's containers and is looking to increase capacity by 50%.

DP World

quay cranes and another 16 rubber-tired gantries.

The \$350m-plus investment is expected to go live at the beginning of 2024.

Callao's second container operator, APM Terminals, operates the North Multipurpose Terminal, which

opened for business in 2011. Besides containers, this terminal handles breakbulk, ro-ro and bulk cargoes.

APMT is also expected to trigger expansion works soon. In the meantime, it is focused on increasing bulk vessel-handling capacity more than containers.

Port authority: Autoridad Portuaria Nacional (APN), Av. Santa Rosa N° 135, La Perla, Callao, Peru
Website: www.apn.gob.pe/site
Email: atencionalusuario@apn.gob.pe
Terminals (Operators):
 DP World Callao (DP World)
 Muelle Norte (APM Terminals Callao)

83 / Yeosu Gwangyang (South Korea)



Throughput 2020: **2,158,755 teu**, **▼ 9.2%** (2019: 2,378,337 teu)

Covid-19 and consolidation continue to chip away at volumes at the jointly administered port

COVID-19 and carrier consolidation took their toll on Yeosu Gwangyang, with box throughput falling 9.2% in 2020.

Volumes at the jointly administered twin ports of Yeosu and Gwangyang dropped from February as the first lockdowns hit, leading to throughput of 2.16m teu for the year.

Consolidation of liners' shipping lanes sent transshipment volume at Gwangyang port falling 36.1% from the previous year, according to Hutchison, its operator.

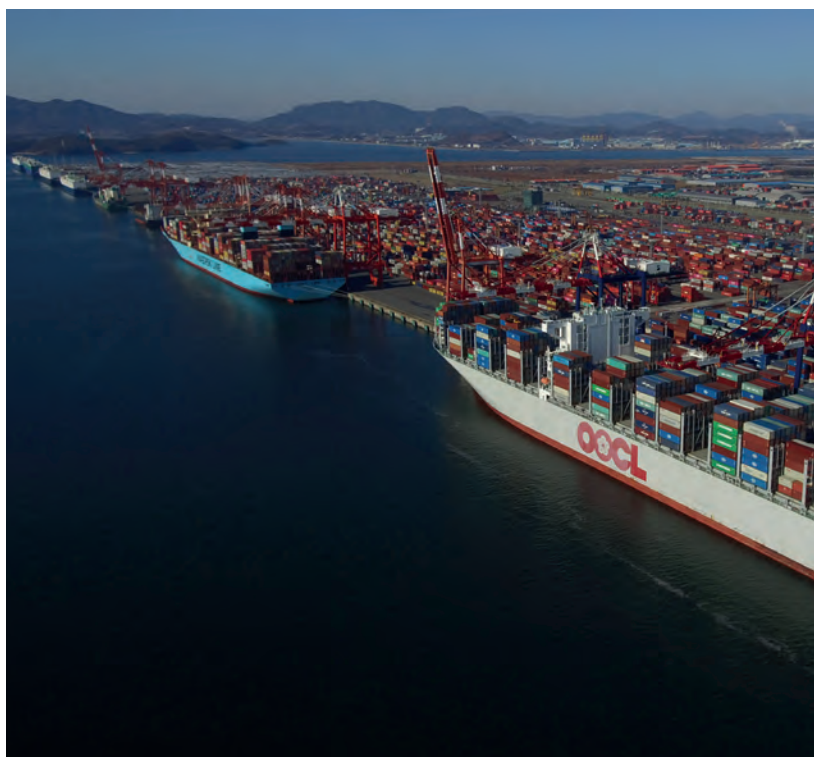
South Korean liner HMM took its Korea-Middle East service — and the 100,000 teu annual volume carried on it — elsewhere when it joined The Alliance in April 2020.

SM Line terminated its American CPX service at Gwangyang port from April 2020, since its Gwangyang Container Terminal was consolidated by GWCT.

The Yeosu Gwangyang Port Authority is setting up an incentive system in a bid to attract the transshipment volumes and boost container trades by expanding its hinterland logistics services.

Volumes for 2021 are likely to be similar to those of last year, with throughput unlikely to increase much, even if the pandemic were to end this year.

In August, South Korea tightened its sulphur cap, with Yeosu and Gwangyang among six ports



Yeosu Gwangyang: lost transshipment volumes as container lines switched lanes.

Hutchison Ports Gwangyang

designated as special emissions control areas.

Ships calling at the ports and their neighbouring waters were required to switch to 0.1% sulphur fuel, but the regulation still provided leeway for scrubber use.

Yeosu Gwangyang often serves as an alternative port for ships avoiding bad weather in China. It also serves as a gateway for

South Korea's petrochemical and steelmaking industries.

Port authority: Yeosu Gwangyang Port Authority, World Marine Center, 465 Hangman-daero, Gwangyang-si, Jeollanam-do, 57771, South Korea.
Website: www.ygpa.or.kr/en
Email: ygpa@ygpa.or.kr
Terminals (Operators):
 Hutchison Ports Gwangyang (Hutchison Ports)
 Gwangyang Port West Container Terminals (Sinokor)

84 / King Abdullah (Saudi Arabia)

▲ 3

Throughput 2020: **2,153,963 teu**, ▲ 6.6% (2019: 2,020,683 teu)

The capture of new alliance services linked to long-term tenant MSC helps Saudi Arabia's transshipment hub return to growth

KING Abdullah port returned to the growth trail in 2020 to reverse cargo losses the previous year, despite coronavirus-induced headwinds.

The Saudi transshipment hub, approximately 90 km north of Jeddah, handled nearly 2.2m teu across the 12-month period, a rise of 6.6% year on year.

KAP only opened its docks just over a decade ago but has already usurped compatriot Dammam to become Saudi Arabia's second-largest container complex, also establishing itself as a firm resident in Lloyd's List's top 100.

Its Red Sea location offers significant transshipment opportunities for east-west transits to the Gulf region and beyond, plus gateway cargoes through to several of Saudi Arabia's largest cities, including Jeddah and Yanbu.

Last year's throughput gains were largely attributable to the addition of two new services linked to KAP operator Terminal Investment Ltd, the port arm of Geneva-based container shipping giant Mediterranean Shipping Co.

Both services operate under the 2M alliance, the vessel-sharing



King Abdullah: port has usurped Dammam to become Saudi Arabia's second-largest container complex.

KAP

agreement between MSC and Maersk Line.

The first, Maersk TP17/MSC Americas, connects east Asia with the US east coast via the Red Sea; while the second, Maersk AE15/MSC Tiger, links the Far East with eastern Mediterranean markets, making a midway call at KAP.

Business generated by MSC has been integral to KAP's success; however, the port is also frequented by nearly all the major deepsea carriers.

The port currently boasts a capacity of around 4.5m teu, but Ports Development Co, the owner and developer of KAP, has plans

to turn KAP into the largest port in the Middle East, with capabilities of handling an eye-watering 25m teu annually.

These lofty ambitions fall under the umbrella of Saudi Arabia's 'Vision 2030', a programme initiated to diversify the country's oil-dependent economy.

Enhancing Saudi's ports and logistics industry forms an integral part of this strategy through to the end of the decade.

PDC hopes it can attract further carriers to take up residency at the port, emulating the success of MSC.

Additional berths have already been built to accommodate prospective clients.

Yet if KAP is to deliver on its promise of becoming a Middle Eastern mega port, it will have to win big in a fiercely competitive market — and then some.

Port authority: Ports Development Company, 46 Entaj Building # 1, Industrial Valley, King Abdullah Economic City 23989, Jeddah 21582, Kingdom of Saudi Arabia

Website: www.kingabduallahport.com.sa

Email: info@portsdevco.com

Terminals (Operators):

National Container Terminal — South Terminal Berths 1-6 (Terminal Investment Ltd and Ports Development Co)

85 / St Petersburg (Russia)

▼ 1

Throughput 2020: **2,099,649 teu**, ▼ 5.5% (2019: 2,221,724 teu)

Russia's largest container port shows resilience during a difficult year

THE Russian Baltic Sea port suffered a dip in throughput caused by the coronavirus pandemic.

However, it was a year of mixed fortunes for the port's container terminal-operating companies.

While terminals controlled by Global Ports increased throughput overall by more than 6% to about 1.5m teu, Container Terminal St Petersburg, controlled by UCL Holding, lost the gains

it made in 2019 and slipped to 659,235 teu from 758,610 teu.

GP was set up in 2008 by Russian transport group N-Trans (TIHL) and Netherlands-headquartered APM

Terminals, each with a stake of 30.75%.

TIHL sold its stake in 2018 to Delo Group, a Russian logistics and freight-forwarding business.

GP wholly owns First Container Terminal, which is Russia's largest terminal in both capacity (1.25m teu) and volume. In 2020, FCT handled more than 1m teu.

GP also wholly owns PLP (Petrolesport), with a capacity of 1m teu, and holds a 75% stake in 400,000 teu-capacity Moby Dik terminal. Finland-based Container Finance Group holds the remaining 25%.

In 2020, GP reported a 17% growth in full export containers, with a 4% growth in full import containers.

FCT is linked to Rotterdam, Hamburg, Bremerhaven and Antwerp through a feeder network, and there are weekly calls by ships operated by Maersk, MSC, CMA CGM, Hapag-Lloyd and others.



St Petersburg: terminals controlled by Global Ports increased throughput overall.

Eshma/Alamy Stock Photo

Moby Dik terminal has an option to expand its 400,000 teu capacity to 500,000 teu when need arises.

In April 2020, GP chairman Morten Engelstoft stepped down to concentrate on his role as chief executive of APM Terminals.

He was replaced by Søren Sjostrand Jakobsen, whose 40-year career has been with AP Moller-Maersk, 14 years of which have been with APM Terminals.

Two months later, GP chief executive Vladimir Bychkov

stepped down and was replaced by Albert Likholet, formerly managing director of Petrolesport and FCT.

Port authority: Port Authority of St Petersburg, 10 Gapsalskaya St, 198035 St Petersburg, Russia

Website: www.pasp.ru

Email: public@mail.pasp.ru

Terminals (Operators):

First Container Terminal (Global Ports)

Petrolesport (Global Ports)

Ust-Luga Container Terminal (Global Ports 80%)

Moby Dik (Global Ports 75%)

Container Terminal Saint-Petersburg (UCL Holding)

86 / Karachi (Pakistan)



Throughput 2020: **2,079,000 teu**, **0.9%** (2019: 2,097,855 teu)

Despite the pandemic, the port's container terminals maintain throughput at similar levels to 2019

CONTAINER terminals at Karachi port handled slightly lower volumes during the pandemic year than in 2019.

In January to March 2020, the port managed 562,000 teu, with 189 ship movements, according to statistics issued by the port authority.

That dropped to 441,000 teu in the April to June period, based on 159 containership calls.

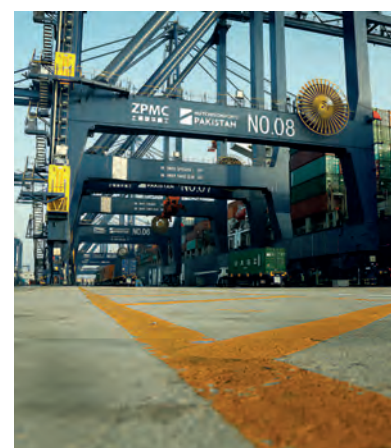
May registered the fewest ship calls, at 37.

Activity bounced back in the third quarter, when the port handled some 485,000 teu,

with 206 ship calls. September saw the greatest number of ship movements in the first nine months, at 72.

The final months of 2020 were even busier, with 591,000 teu handled, taking the total to almost 2.1m teu for the full year. That is about 1% lower than in the previous year.

Preventative measures were taken to combat coronavirus, such as disinfecting public areas. Companies were also allowed to store boxes for free during a 15-day period starting in April, due to a national lockdown.



Karachi: final months of 2020 saw a total of 591,000 teu handled by the port's terminals.

Hutchison Ports

In May, the port handled its largest vessel, the 13,100 teu *Hong Kong Express*, which has an overall length of 366.5 m. A month earlier, it welcomed the Hapag-Lloyd-operated 12,500 teu *Southampton Express*.

Pakistan's economy continued to recover from the pandemic and, in the first three months of 2021, box volumes in the country grew 11% versus the same period in 2020, according to Pakistan International Container Terminal.

The company — which is pursuing an early extension to its 21-year concession, issued in 2002 — handled 128,688 teu in the first quarter of 2021, up from 102,180 teu in the corresponding period in 2020, it said in its annual report.

Hutchison Ports has meanwhile embarked on the second phase of a deepwater terminal construction project, with an investment of \$240m. Upon completion — which was

originally aimed at the end of 2020 — handling capacity will be doubled to about 3.2m teu.

Port authority: Karachi Port Trust, Eduljee Dishaw Road, Karachi-74000, Pakistan

Website: www.kpt.gov.pk

Email: info@kpt.gov.pk

Terminals (Operators):

Karachi International Container Terminal (Hutchison Ports)

Pakistan International Container Terminal (ICTSI)

Qasim International Container Terminal (DP World)

Pakistan Deepwater Container Terminal (Hutchison)

87 / Guayaquil (Ecuador)

11

Throughput 2020: **1,980,600 teu**, **1.9%** (2019: 1,943,197* teu)

Ecuadorian port climbs the rankings off the back of healthy throughput gains, while laying out plans for a new special economic zone

ECUADOR'S premier box hub Guayaquil posted a moderate growth figure for 2020, following stable performances from its four terminals with container-handling capabilities.

Contecon Guayaquil, a subsidiary of Philippine port operator International Container Terminal Services Inc, and Seattle-based SAAM Marine's Terminal Portuaria Guayaquil handle the lion's share of box trade in Guayaquil.

However, it was the former that came out on top in 2020.

TPG saw volumes drop back from 856,800 teu to 781,200 teu year on year, while ICTSI reported a jump from around 824,000 teu in 2019 to 840,000 teu last year.

The port's two smaller terminals, Fertisa and Bananapuerto — the Ecuadorian hub utilised by US fruit giant Dole — reported similar throughput numbers in 2020 to the previous year.

But the major news out of Guayaquil over the past 18 months is expansion.

Firstly, ICTSI, which extended its concession at the port for a further 20 years in 2019 through



Guayaquil: major news over the past 18 months is expansion.

ICTSI

to 2047, revealed it is investing \$18m to boost the handling of ultra large containerships at its Contecon facility. This includes both berth deepening and quay crane upgrades.

Meanwhile, SAAM Marine also inaugurated its own dock expansion in October last year, as a part of a major modernisation programme to facilitate the berthing of larger containerships.

Yet more significant is news that Guayaquil is planning the creation of a special economic zone, which will be situated adjacent to the existing port.

Offering businesses substantial tax cuts and incentives to take up residency — which was presented formally in April via the Declaration

of Special Economic Development Zone, or ZEDE, by the Ecuadorian government and port stakeholders — the project aims to strengthen the competitiveness of the country's export trade.

**Guayaquil's 2019 throughput figure has been updated to include volumes recorded by Fertisa Terminal and Bananapuerto. Volumes for 2020 are estimated.*

Port authority: Autoridad Portuaria de Guayaquil, Av de La Marina via Puerto Marítimo Guayaquil, Ecuador

Website: www.apg.gob.ec

Email: info@apg.gob.ec

Terminals (Operators):

Contecon Guayaquil (ICTSI)

Terminal Portuaria Guayaquil (SAAM Marine)

Fertisa Terminal (Fertisa Terminal Portuario)

Bananapuerto (Naportec/Dole)

88 / Haikou (China)

NO CHANGE

Throughput 2020: 1,970,000 teu, **0%** (2019: 1,970,000 teu)

Throughput stagnates as the southwestern China port blames coronavirus and frequently severe weather

THE gains made by Haikou port after being invested in by Cosco Shipping in 2019 and incorporated into the Chinese shipping giant's network petered out in 2020.

Priorities seem to have changed within the group in terms of the hub port for the southwestern region of the country.

Throughput stagnated from the previous year's level as Haikou port blamed the coronavirus epidemic, a decline in cargo volume, and the frequent occurrence of severe weather for the challenges facing it.

However, Cosco Shipping has also given mixed signals about its role vis-à-vis Qinzhou port — just across the bay from Haikou and on the mainland, with intermodal rail-sea connections — which has recently been given added impetus from investment by its ports arm.

Meanwhile, even within Hainan province, the group's priorities seem to be unclear.

Yangpu port, to the west of the current main port of Haikou, seems to be getting the bulk of its attention, with new investments and designation as the ILSTC's international hub.

There have been efforts to increase local network connectivity between the terminals and also provide new services to take advantage of the free trade rights granted to Hainan province as a whole.

This includes new routes to and from Asean ports and on to northern China ports, such as Jinzhou and Tianjin, as well as other budding domestic hubs such as Nansha and Qinzhou. However, these seem to be more to the benefit of the newer terminal.

Overall, Cosco Shipping and other domestic shipping companies opened up five domestic and



Haikou: priorities for the hub port seem to have changed within the Cosco group.

Imaginechina Limited/Alamy Stock Photo

foreign trade transportation routes at the Yangpu International Container Terminal, which enables same-ship transshipment of foreign boxes to other Chinese ports.

In addition, eight new international routes were opened up, including one mainline service. Two intra-island barge services linking various container terminals were also introduced.

While the service to Vietnam is being run by China United Shipping, other more groundbreaking routes — such as the Yangpu-South Pacific-Australia route, billed as the first intercontinental route opened by the Hainan Free Trade Port — are being driven by Cosco Shipping.

The giant line also launched a new Yangpu-Hong Kong-Papua New Guinea-New Zealand-North Australia route, ostensibly to meet the needs of customers and support China's dual-circulation policy while creating a new southbound international waterway.

Ongoing trade tensions with countries in the region might have put a damper on these ambitions.

New investments in equipment are also being allocated to the up-and-coming provincial port.

Yangpu International Container Terminal has become the first

container terminal with automated yard operations in the so far relatively undeveloped Hainan province, increasing its handling capacity from 650,000 teu to 1.6m teu.

Being designated a free trade port and coming under the wing of a state-owned giant has benefits and suggests a degree of favour.

However, ultimately success must depend on the viability of the port itself, as artificial supports can only achieve so much while their continued provision is also uncertain.

Cosco Shipping's grand plans for its network of China ports are a blackbox for now as the entire sector just about completes its consolidation process.

For ports like Haikou, with its older infrastructure and location-related constraints on expansion, the indirect signals coming from its new management may prove to be the writing on the wall.

Port authority: Hainan Port and Shipping Holding, Hong Kong Airlines Building, No 157, Binhai Avenue, Haikou City, Hainan Province

Website: www.hnhs.coscoshipping.com

Email: service@hngh.com.cn

Terminals (Operators):

Xiu Ying (Hainan Port and Shipping Holding)

Macun (Hainan Port and Shipping Holding)

Xinhai (Hainan Port and Shipping Holding)

89 / Jiaxing (China)

2

Throughput 2020: **1,955,700 teu**, **4.8%** (2019: 1,865,300 teu)

The feeder port is on track to hit 2m teu throughput in 2021, having missed the target in 2020 due to coronavirus

THE port of Jiaxing failed to achieve its target to reach 2m teu in container throughput for 2020.

However, its 4.8% annual growth is still laudable, given a 12% volume decline seen during the first half of last year.

As a feeder port situated in between Shanghai and Ningbo — the world's largest and third-busiest ports, respectively — its performance has reflected China's quick emergence from the fallout of the coronavirus outbreak in the country.

Demand for Chinese containerised products has since increased sharply, fuelled by lockdown-led changes of shopping habits and governments' stimulus packages in large consumer countries.

Last year also saw Jiaxing's sea-river transport service — a key project promoted by the port to connect wider hinterland alongside the Yangtze River and draw traffic



Jiaxing: revving up efforts to develop the 'bulk-to-container' business.

Jiaxing Port Co

from road transport — handle 363,000 teu, up 62.6% from 2019.

Local government has set the target at 1m teu by 2024.

Accordingly, Jiaxing has been revving up efforts to develop the so-called "bulk-to-container" business, referring to containerisation of bulk cargo.

Conversion of the existing bulk facilities to enable box-handling capability is being undertaken in its two main port areas, Zhapu and Dushan, where seven multi-purpose berths and two general-cargo berths are expected to be brought on stream between later this year and 2022.

So far, Jiaxing appears on track to hit 2m throughput for 2021, having handled 860,000 teu in January-May, up 37.5% year on year.

Port authority: Jiaxing Port and Shipping Administration Service Centre, No. 208, Wangjiayan Road, Zhapu Town, Pinghu City, Jiaxing City, China

Website: www.jxbhxq.gov.cn

Email: 3152009021@qq.com

Terminals (Operators):

Zhapu International Container Terminal (Zhejiang Seaport Investment & Operation Group)
SIPG Pinghu Dushan Port Co (Shanghai International Port Group, Zhejiang Seaport Investment & Operation Group, Dushan Port Investment Ltd)

90 / Mersin (Turkey)

2

Throughput 2020: **1,948,700 teu**, **5.1%** (2019: 1,854,312 teu)

Turkish port begins its expansion that will add another 1m teu in capacity

THE port of Mersin grew for a fourth consecutive year, seeing through the pandemic as it steps into a new phase.

The southeastern Turkish port, which is run by Mersin International Port — a consortium consisting of PSA, IFM and Afkem — saw its throughput rise by more than 5% in 2020.

Mersin's proximity to and connectivity with destinations in Turkey and Middle East

neighbours have made it a key trading hub for Turkey and the surrounding region.

With the momentum of the past few years on its back, Mersin is poised for greater heights in the short and mid term.

Earlier this year, MIP also officially launched the \$375m East Med Hub (EMH) II expansion project, which will increase the port's capacity from the current 2.6m teu to 3.6m teu, through a



Mersin: key trading hub for Turkey and the surrounding region.

Philipp Bereznoy/Alamy Stock Photo

new berth and enlargement of its yard.

It is expected to be completed by the end of 2022 and will allow Mersin to serve two 400 m boxships concurrently. MIP will also add four new

quay cranes and 24 additional yard cranes. Early data from MIP for 2021 shows significant growth achieved year on year in the first six months, suggesting that Mersin may be on its way to further growth.

Port authority: Mersin International Port Management, Yenimahalle 101, Cadde 5307, Sokak No: 5 33100, Mersin, Turkey

Website: www.mersinport.com.tr

Email: info@mersinport.com.tr

Terminals (Operators):
Berths 1-9 (PSA International and Akfen Holding)

91 / Gdansk (Poland)

5

Throughput 2020: **1,924,000 teu**, **7.2%** (2019: 2,073,215 teu)

Polish port's volumes dip in 2020 but the future is bright, with plans afoot to rival the long-established port majors in Europe's northern range

POLAND'S premier port Gdansk dropped back five places in the 2020 rankings, as one of the many ports that saw volumes dented by the pandemic.

Having eclipsed the 2m teu mark for the first time in its history in 2019, Gdansk's volume gains were effectively wiped out last year, following a 7.2% fall in traffic to 1.9m teu — only slightly higher than its 2018 total.

However, 2020's misfortunes will only be seen as a minor blip for the Baltic box hub. So far this year, volumes are tracking above its 2019 record — but more significant are the big plans on the table for Gdansk's future.

DCT Gdansk, or Deepwater Container Terminal Gdansk, home to the port's container operations, has seen rapid volume growth since its inception in 2007.

In April this year, DCT Gdansk celebrated handling the

15-millionth 20 ft container across its docks. The Polish port is now a regular fixture on service rotations for continental trade in and out of Europe, serving as a transshipment hub to locations throughout the Baltic and as a key gateway to eastern and central Europe.

In 2019, DCT Gdansk became part of Singaporean port giant PSA International's group portfolio, with the promise of elevating the port to a level that would rival the long-established port majors in Europe's northern range.

Since its takeover, PSA has showed little let-up in the ongoing development of the container facility, moving swiftly towards the completion of DCT Gdansk's T2B programme to enhance the port's capabilities in four key areas: berth, yard, gate and rail.

Earlier this year, DCT Gdansk also embarked on the initial stages of its next expansion phase, launching a



Gdansk: big plans on the table for its future.
PSA International

tender for the construction of a new terminal, under a project dubbed 'Baltic Hub 3'.

Although terminal specifications and a timeframe for Baltic Hub 3 have still to be revealed, it is clear that PSA is looking to maintain and build on the rapid rise of Gdansk witnessed in recent years.

Port authority: Port of Gdansk Authority SA, 18 Zamknieta Str, 80-955 Gdansk, Poland

Website: www.portgdansk.pl/en

Email: info@portgdansk.pl

Terminal (Operator):
Deepwater Container Terminal Gdansk (PSA International)

92 / Nantong (China)

NEW

Throughput 2020: **1,911,000 teu**, **23.9%** (2019: 1,542,000 teu)

Chinese port benefits from the government's efforts in consolidating the local port sector, with support from Cosco

NANTONG, about 100 km northwest of Shanghai, has witnessed a rapid growth in container throughput

at its port over the past two years. Volume surged to more than 1.9m teu in 2020 from less

than 1m teu in 2018. This came against the backdrop of the port consolidation in Jiangsu province,

where Nantong is based. Under Beijing's mandate, the provincial government was aiming to remove excessive competition in the local port sector and make trade flows more efficient.

As part of the efforts, seven other ports — Nanjing, Lianyungang, Suzhou, Zhenjiang, Changzhou, Taizhou and Yangzhou — were included, alongside Nantong, into the Jiangsu Port Group, established in 2017.

The group later signed a memorandum of understanding with the Shanghai Port International Group and China Cosco Shipping Corp to enhance co-operation, including services in relation to river-sea shipping.

Situated near the mouth of the Yangtze River and being close to

Shanghai, home to the world's busiest container hub, Nantong has clearly benefitted from the consolidation plans.

In July 2018, Cosco acquired a 51% stake in Nantong Tonghai Terminal and has since gradually shifted its focus onto the facility from other box terminals at nearby river ports.

Policymakers in Jiangsu now want to develop the Tongzhou Bay port area on the coastal side into a new outlet for export containers through the Yangtze River.

For the first half of 2021, Nantong handled 1m teu, up 15.3% year on year. While most of the traffic was still derived from feeder and domestic shipping, direct international services contributed the strongest growth momentum, up more than 65%.



Nantong: witnessed a rapid growth in throughput over the past two years.

Richard Jackson/Alamy Stock Photo

Port authority: Nantong Port Authority, No.2 Chongwen Road, Nantong City, Jiangsu Province, China

Website: gwj.nantong.gov.cn

Email: ntgkjbg@163.com

Terminal (Operators):

Nantong Tonghai Terminal (Cosco Shipping Ports, Port of Nantong Co)

93 / Dammam (Saudi Arabia)

NO CHANGE

Throughput 2020: **1,863,249 teu**, **2.2%** (2019: 1,822,642 teu)

A modest volume increase sees the Saudi port sit tight in the top 100 rankings, yet major expansion plans promise movement up the ladder

DAMMAM achieved modest growth in 2020, after a volume increase approaching 20% had propelled the Saudi port back into the rankings the previous year.

Volumes of nearly 1.9m teu in 2020 represented a 2.2% increase over its 2019 total.

For the port of Dammam — also known as King Abdulaziz port after the former king and founder of Saudi Arabia — 2020 marked a significant period in its history, and one that has cemented its future as a key box destination in the Persian Gulf.

In April last year, Singaporean giant PSA International signed off on a deal to build and operate both Dammam's First and Second Container Terminals.

Previously, PSA, through its unit Saudi Global Ports, was responsible for the port's second terminal.



Dammam: PSA has pledged to pump more than SR7bn (\$1.9bn) into the port.

PSA

However, in a landmark agreement, PSA pledged to pump more than SR7bn (\$1.9bn) into Dammam, representing the largest seaport investment by a single operator under a public private partnership with the Saudi Ports Authority, or Mawani, to become the port's sole operator.

Previous tenant Hutchison has since vacated the terminal, having been at the port for more than two decades, although the group

has recently invested in another Saudi port on the Red Sea.

Meanwhile, PSA, through SGP, has major plans for Dammam.

Although the port primarily serves as a gateway to eastern and central provinces, including the capital Riyadh, SGP is also looking to utilise its prospects as a transshipment port to the wider Gulf region.

Under its 30-year concession at the port, SGP will use the funding pledge to transform King Abdulaziz port into a "leading mega container hub", which will see capacity increased to as much as 7.5m teu.

Port authority: King Abdulaziz Port, PO Box 28062, Dammam 31118 Saudi Arabia

Website: www.ports.gov.sa/English/SAports/Dammam

Email: info@ports.gov.sa

Terminals (Operators):

First Container Terminal (Saudi Global Ports)

Second Container Terminal (Saudi Global Ports)

94 / Zhuhai (China)

17

Throughput 2020: **1,840,000 teu**, **28%** (2019: 2,556,000 teu)

Major carriers ceasing or suspending services have a worrying impact on the port's container traffic

THE 28% decline has pushed the box throughput at the southern Chinese hub, a key feeder port to nearby Shenzhen and Hong Kong, to its lowest level since 2017.

A report of the local transport bureau has revealed the reasons behind the dramatic fall.

"The main problem of container [business] first lies in the fact that about 80% of Zhuhai's throughput is generated by big carriers, including Cosco Shipping, Shanghai PanAsia and Zhonggu Logistics, which has a big say in the market.

"Second, ports are in perfect-competition market. With limited hinterland resources, Zhuhai is highly reliant on those large carriers."

The report said PanAsia, Cosco's Chinese coastal shipping unit, halted the Gaolan-Taicang route

at the port last year, leading to a volume loss of 440,000 teu compared to 2019.

Meanwhile, another 250,000 teu was knocked off by the service suspension of its rival carrier Antong Shipping due to the coronavirus crisis and financial restructuring.

Handling volume recovered by 10% in January-April from the year-ago period, but still fell far short of the previous peaks.

That has raised concerns over the prospects of the Phase Two project at the Gaolan port area, completed in November. The project, worth Yuan4bn (\$577.6m), boasts an annual handling capacity of 1.8m teu.

Perhaps the port consolidation efforts by the Chinese government can find a solution to the problems troubling Zhuhai.



Zhuhai: in 2020, the key feeder port saw its lowest throughput figures since 2017.

Zhuhai Port Group

Port authority: Zhuhai Transport Bureau, No 62, Meihuaxi Rd, Xiangzhou District, Zhuhai City, PRC

Website: <http://zhjt.zhuhai.gov.cn>

Email: zhjtjz@zhuhai.gov.cn

Terminals (Operators):

Zhuhai International Container Terminals (Golan) (Zhuhai Port Holdings Group)
Zhuhai International Container Terminals (Hong Wan) (Zhuhai Port Holdings Group)
Zhuhai Port Gaolan Stevedoring Co (Zhuhai Port Holdings Group)
Zhuhai Port Hongwan Stevedoring Co (Zhuhai Port Holdings Group)

95 / Taichung (Taiwan)

1

Throughput 2020: **1,821,000 teu**, **1.5%** (2019: 1,793,966 teu)

Among a handful of Taiwanese major facilities to post volume growth in 2020, the port sets a new throughput record

TAICHUNG port saw a further slowdown in growth to 1.5% in 2020 but still achieved a slight rise in throughput to just over 1.8m teu in a coronavirus-impacted year.

This was enough to set a new record and put it among just a handful of Taiwanese major ports that posted any volume growth.

The port continues to promote itself as a hub for cross-strait trade as well as intra-Asia transshipment volumes, changing geopolitics and trade dynamics notwithstanding.

Major terminal operators Evergreen and Wan Hai both increased volumes at their respective terminals, while China Container Transport saw a decline.

The better-than-expected performance last year can be partly attributed to Taiwan being relatively less affected by the Covid-19 pandemic, with average growth of 1.5% in the first five months of 2020.

The unusual circumstances also led to surprising consecutive month export order increases in

March and April at the height of the pandemic, as a rise in Taiwanese hi-tech device exports helped offset the impact on traditional industrial firms.

In May 2021, Wan Hai launched a new service, with 3,055 teu vessels from Taichung on unspecified Asian routes.

Meanwhile, the port continues to forge ahead with its green plans, continuing to work on its port excellence programme and green port development project.

The project is billed to improve environmental quality at the port, significantly reduce pollution, and enhance the reuse and recycling of a broad spectrum of resources that will set Taichung firmly on course to its target of becoming a sustainable green port.

Taichung port is taking a two-pronged approach to development. While continuing to build up its facilities to support the burgeoning offshore wind sector, the port is also developing a free trade zone.

Logistics company Whale Shipping & Enterprise was the latest to win a bid to develop a warehouse and logistics centre in the zone.

Meanwhile, big names in the renewables space such as Ørsted



Taichung: continues to forge ahead with its green plans.

Port of Taichung Free Trade Zone

are also taking up long-term leases for dedicated berths and facilities to bring offshore windfarms online.

New landside infrastructure has been completed as the port's new

Offshore Wind-Farm Industry Park sees new companies setting up and starting full production operations.

While it is unclear what impact this will have on container volumes as more work gets undertaken onsite, it seems Taichung port's base load of container business remains intact, judging by the way it has maintained its position through the worst of the coronavirus impacts.

Port authority: Port of Taichung, Taiwan International Ports Corporation; No. 2 Sec 10, Taiwan Boulevard, Wu-Chi District, Taichung, Taiwan.

Email: shyongss@twport.com.tw

Website: <https://tc.twport.com.tw/en>

Terminals (Operators):

Terminal 1: Berths 10-11 (China Container Terminal Corporation)

Terminal 2: Berths 32-33 (Evergreen International Storage & Transport Corp.)
Berths 34-35 (Wan Hai Lines)

96 / Southampton (United Kingdom)



Throughput 2020: **1,809,237 teu**, **6%** (2019: 1,924,847 teu)

Port returns to a growth trajectory, with a major infrastructure upgrade programme now under way

A MAJOR investment programme is now under way at Southampton as one of the UK's premier container terminals responds to the surge in cargo volumes seen since mid-2020 and prepares for further growth.

That positive outlook is likely to be underpinned in the years ahead by the freeport status awarded by the UK government in early 2021 to the Solent Freeport consortium, which includes DP World Southampton.

Although total throughput declined in 2020 compared with 2019, that drop largely reflected a contraction in the early part of the year, when the pandemic hit major economies.

As consumer spending patterns started to change in the summer, the container trades experienced an extraordinary recovery that saw a corresponding rebound in



Southampton: DP World has earmarked £40m-worth of investments for the UK south coast facility.

DP World

boxes handled by leading container ports such as Southampton, where Asia-Europe services account for about 70% of volumes.

DP World, which operates both Southampton's container facilities and London Gateway on the River

Thames, close to London, is now spending £40m (\$55.4m) on new infrastructure for the south coast terminal, where annual capacity is around 2.4m teu.

That includes dredging and widening of berths to enable

Southampton to continue handling the world's largest containerships, plus £10m to be spent on a new class of hybrid straddle carriers, the redevelopment of the storage yard for empty containers, and a £1.5m extension of a quay crane rail.

This work, along with the cargo bulge and impact on global shipping services caused by the Suez Canal blockage in March 2021, disrupted berth window availability after an excellent performance in 2020, according

to some lines. However, the delays are expected to be fairly short-lived.

The Dubai ports group — which says Southampton is the most productive container facility in Britain, with the fastest truck turnaround times — acquired full control of DP World Southampton in 2015, when its joint venture with Southampton port owner ABP ended.

It has subsequently combined some activities with those of London Gateway to gain efficiencies and believes the ability

to offer customers a choice of UK ports is paying dividends.

A highlight of 2020 was the arrival of the 23,100 teu *CMA CGM Jacques Saadé*, the world's largest boxship to be fuelled by liquefied natural gas.

Port authority: ABP Southampton, Ocean Gate, Atlantic Way, Southampton, Hampshire SO14 3QN
Website: www.southamptonvts.co.uk / www.dpworldsouthampton.com
Email: southamptoncommercial@abports.co.uk / info@dpworldsouthampton.com
Terminal (Operator): DP World Southampton (DP World)

97 / Izmit (Turkey)

1

Throughput 2020: **1,800,642 teu**, **5%** (2019: 1,715,193 teu)

Turkish port cements its top 100 status as volumes continue to grow at terminals lining the Izmit Bay coastline

THE Turkish port of Izmit enjoys a second year in the Lloyd's List rankings, having made its debut in 2019, following another 12 months of throughput growth.

Volumes at terminals dotted along the coastline of Izmit Bay, around 60 km east of Istanbul, nudged up to slightly above 1.8m teu off the back of a 5% jump in box numbers year on year.

Izmit is home to six terminals with container-handling capabilities, dealing with both domestic and deepsea trade.

The latter is moved through the port's three largest facilities: Yilport Gebze Container Terminal — the flagship facility of Turkey's global port operator Yilport; Evyap Group's Evyapport Container Terminal; and DP World Yarimca.

The trio of terminals have become a firm fixture on mainline port rotations serving the east Mediterranean and, between them, welcome calls from all three of the major carrier alliances: 2M, The Alliance and Ocean Alliance.

The addition of several new services at the port helped mitigate



Izmit: terminals welcome calls from all three of the major carrier alliances.

Yilport

the impact of Covid-19 disruption, while figures in the first half of 2021 offer further encouragement for the port, up by more than 12% on last year's total.

Although there was little to report in terms of ongoing development at both ECT and DP World Yarimca, which is continuing to ramp up business since its 2016 opening, Yilport has been busy with a few upgrades to its self-coined "home terminal", GCT.

In addition to adding four all-electric rubber-tyred gantry cranes

to GCT's new container stacking yard, the port is also in the process of installing a new rail terminal to enhance its multimodal offering.

Port authority: TC UAB Kocaeli Port Authority, Atalar Mah.Sahil Yolu Cad. No:26 Yarimca-Körfez KOCAELI
Website: kocaeliliman.uab.gov.tr
Email: kocaeli.liman@uab.gov.tr
Terminals (Operators): Yilport Gebze Container Terminal (Yilport) Evyapport Container Terminal (EVYAP) DP World Yarimca (DP World) Belde Port Terminal (MED Lojistik) Safi Derince International Port (Safi Holding) Limaş Terminal (Hayat Holding)

98 / Lomé (Togo)

NEW

Throughput 2020: **1,725,270 teu**, **▲ 15%** (2019: 1,500,611 teu)

West African port makes its debut in the top 100 rankings, having cemented its position as the region's premier transshipment hub

THE Togolese port of Lomé, located on the Gulf of Guinea, enters the top 100 for the first time, following a stellar volume performance in 2020.

Throughput numbers jumped 15% on the previous year to more than 1.7m teu to cement Lomé's position as the principal port in West Africa.

Lomé has taken the crown of the region's largest port from former top 100 regular Lagos in Nigeria, making its last bow in 2016. Lagos has lost a considerable share of box traffic in recent years due to chronic congestion and poor service reliability.

Meanwhile, Lomé has gone from strength to strength off the back of the opening of the Lomé Container Terminal, a 50/50 joint venture between Terminal Investment Ltd, the port arm of Mediterranean Shipping Co, and China Merchants Port Holdings.



Lomé: taken the crown of the region's largest port from Lagos in Nigeria.

Joerg Boethling/Alamy Stock Photo

LCT, which opened in 2014, is one of the few natural deepwater ports in West and Central Africa, serving both as a major transshipment hub for the regions and as a gateway to landlocked Mali, Niger and Burkino Faso, as well as northern Nigeria.

While growth at other terminals in the region has stagnated, LCT has benefitted significantly from volumes generated by its affiliated carrier MSC and its capability of handling vessels of

up to 14,000 teu, a feat so far unmatched in West Africa.

In 2020, LCT saw liftings across the quay climb by more than 20% to just shy of 1.4m teu. The remainder of Lomé's traffic was handled by Lomé's Togo Terminal, part of global operator and regional specialist Bolloré Ports' portfolio of facilities located predominately on the African continent.

LCT — and, with it, Lomé — is looking to build on its recent rise through further expansion. MSC plans to invest a reported €500m (\$588m) over the next decade in the facility to increase its capacity to as much as 4m teu.

Port authority: Port Autonome de Lomé, PO Box 1225, Lomé, Togo

Website: www.togoport.tg

Email: togoport@togoport.tg

Terminals (Operators):

Lomé Container Terminal (Terminal Investment Ltd/China Merchants Port Holdings)
Togo Terminal (Bolloré Ports)

99 / Alexandria (Egypt)

NEW

Throughput 2020: **1,677,017 teu**, **▲ 6.9%** (2019: 1,800,391 teu)

Egyptian port, responsible for approximately 60% of the country's foreign trade, is set to welcome CMA CGM as a new tenant in 2022

ALEXANDRIA*, located at the top of the Nile Delta, has a history that stems back as far as 2000 BC. To this day, it remains one of the most important ports in the eastern Mediterranean.

The ancient port saw volumes fall back nearly 7% in 2020 to 1.7m teu, with cargo flows heavily impacted by both localised and regional coronavirus restrictions.

According to the Alexandria Port Authority, Alexandria handles approximately 60% of the country's foreign trade, benefitting from a strong link to the Egyptian hinterland.

Only minimal transshipment traffic is moved through the port.

Container operations at the Egyptian port are split between two complexes: Alexandria in the east and El Dekheila to the west.

Each complex consists of two terminals, with the port operators Alexandria International Container Terminals, a subsidiary of Hutchison Ports, and Alexandria Container and Cargo Handling, responsible for one apiece at each site.

The two sites are similar in size and also handled similar box numbers in 2020.

However, while the eastern side of the port, Alexandria,

more or less matched its 2019 throughput total, El Dekheila reported a slump of nearly 13%, according to government figures.

AICT and ACCH will soon be joined by another port operator, with news earlier this year that CMA CGM will be responsible for the management of Alexandria's new multipurpose facility, or

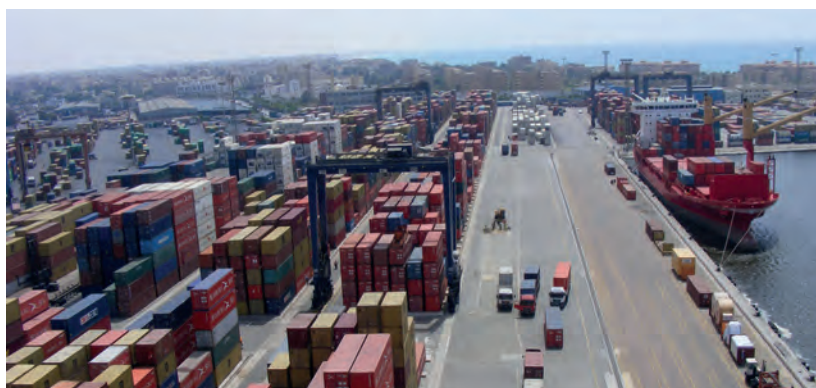
Pier 55, entering a long-term partnership with the Egyptian government.

The new terminal is slated to open in 2022, covering an area of 560,000 sq m and boasting a quay length of more than 2 km. The development will include capacity to handle around 1.5m teu per annum.

Meanwhile, Hutchison Ports has also signed an agreement with the Egyptian Navy to develop and operate a new 2m teu capacity container terminal 20 km east of Alexandria in the small coastal town of Abu Qir.

The first phase of the \$730m terminal is scheduled to open in 2022.

**Alexandria's 2019 & 2020 teu figures have been adjusted to include volumes at El Dekheila*



Alexandria: ancient port is one of the most important in the eastern Mediterranean.

Hutchison Ports

Port authority: Alexandria Port Authority, 106 El-Horyiea Avenue, Alexandria, Egypt

Website: www.apa.gov.eg

Email: info@apa.gov.eg

Terminals (Operators)

Alexandria:

Alexandria Terminal (Alexandria Container and Cargo Handling Co)

Alexandria Terminal (Alexandria International Container Terminals)

El-Dekheila:

El Dekheila Terminal (Alexandria International Container Terminals)

El Dekheila Terminal (Alexandria Container and Cargo Handling Co)

100 / Jinzhou (China)

10

Throughput 2020: **1,643,000 teu**, **↓ 12.6%** (2019: 1,879,000 teu)

Port sees double-digit decline in throughput due to coronavirus and the resulting economic recessions

JINZHOU fared poorly in 2020, seeing a double-digit decline in its container shipping throughput.

One of the port's main box facilities, Jinzhou New Age Container Terminal — a joint venture between Cosco Shipping, Jinzhou Port Co and Dalian Port Group — reported 722,981 teu, down 6.1%.

The port's hinterland, the northeastern part of China, Mongolia and part of Russia, was hit by the coronavirus pandemic and the resulting economic recessions.

As part of the consolidation plan in Liaoning Province, Jinzhou and several other major ports, including Dalian and Yingkou, have been put under the management of China Merchants Port to create synergies.

The port giant is now pushing ahead with the integration between



Jinzhou: operators are keen to increase routes leading to ports in the south.

Cosco Shipping Ports

Jinzhou and Huludao in order to improve their efficiency and competitiveness.

Domestic trade remains the main cargo source at Jinzhou, where port operators are keen to increase routes leading to ports in the south, such as Taicang and Yangpu. Further developing rail-sea

transport is also an important approach towards a recovery.

On this aspect, Jinzhou strengthened its networks in Inner Mongolia by adding three services linking Yuanbaoshan, Daban and Yamenying last year.

In May of 2021, the port also launched a new rail freight service to Moscow to expand the so-called New Northeast Land-Sea Corridor, a trade lane that China aims to develop with Russia and Mongolia to boost the regional economy.

Port authority: Jinzhou Port Bureau

Website: www.jinzhouport.com

Email: jzp@jinzhouport.com

Terminals (Operators):

Jinzhou Container Terminal (Jinzhou Port Co)

Jinzhou New Age Container Terminal

(Cosco Shipping Ports, Jinzhou Port Co, Dalian Port Group)

A-Z The top 100 ports in 2020

	Port	2020 annual throughput (teu)	% +/-
56	Abu Dhabi	3,220,000	↑ 15.8%
99	Alexandria	1,677,017	↓ 6.9%
33	Algeciras	5,107,873	↓ 0.3%
66	Ambarli	2,887,800	↓ 7.0%
13	Antwerp	12,031,469	↑ 1.4%
58	Balboa	3,161,900	↑ 9.2%
64	Barcelona	2,958,040	↓ 11.0%
36	Bremen/ Bremerhaven	4,767,000	↓ 1.9%
7	Busan	21,824,000	↓ 0.8%
42	Cai Mep	4,411,799	↑ 17.9%
82	Callao	2,250,827	↓ 2.7%
59	Cartagena	3,127,579	↑ 4.4%
80	Charleston	2,309,995	↓ 5.2%
67	Chittagong	2,839,977	↓ 8.0%
24	Colombo	6,854,762	↓ 5.2%
40	Colón	4,454,902	↑ 1.7%
32	Dalian	5,110,000	↓ 41.7%
93	Dammam	1,863,249	↑ 2.2%
52	Dongguan	3,420,000	↓ 7.1%
11	Dubai	13,488,000	↓ 4.4%
72	Durban	2,595,402	↓ 6.3%
51	Felixstowe	3,435,000*	↓ 9.6%
49	Fuzhou	3,520,000	↓ 0.6%
91	Gdansk	1,924,000	↓ 7.2%
73	Genoa	2,498,850	↓ 6.4%
57	Gioia Tauro	3,193,000	↑ 26.6%
5	Guangzhou	23,505,300	↑ 1.2%
87	Guayaquil	1,980,600	↑ 1.9%
31	Hai Phong	5,142,300	↑ 0.2%
88	Haikou	1,970,000	↑ 0.0%
18	Hamburg	8,540,000	↓ 7.9%
20	Ho Chi Minh City	7,854,091	↑ 4.3%
9	Hong Kong	17,953,000	↓ 2.2%
62	Houston	3,001,164	↑ 0.4%
55	Incheon	3,272,213	↑ 5.8%
97	Izmit	1,800,642	↑ 5.0%
39	Jawaharlal Nehru	4,470,000	↓ 12.4%
37	Jeddah	4,737,313	↑ 6.8%
89	Jiaxing	1,955,700	↑ 4.8%
100	Jinzhou	1,643,000	↓ 12.6%
16	Kaohsiung	9,621,662	↓ 7.7%
86	Karachi	2,079,000	↓ 0.9%
84	King Abdullah	2,153,963	↑ 6.6%
71	Kobe	2,647,066	↓ 7.8%
22	Laem Chabang	7,546,500	↓ 6.9%
77	Le Havre	2,417,000	↓ 14.4%
35	Lianyungang	4,800,000	↑ 0.4%
98	Lomé	1,725,270	↑ 15.0%
69	London	2,772,000	↓ 0.6%
19	Long Beach	8,113,300	↑ 6.3%

*estimated figure

	Port	2020 annual throughput (teu)	% +/-
17	Los Angeles	9,213,400	↓ 1.3%
41	Manila	4,442,921	↓ 16.4%
65	Manzanillo	2,909,632	↓ 5.2%
76	Marsaxlokk	2,441,589	↓ 10.3%
63	Melbourne	2,995,248	↑ 0.9%
90	Mersin	1,948,700	↑ 5.1%
26	Mundra	5,656,594	↑ 19.5%
74	Nagoya	2,471,146	↓ 13.1%
61	Nanjing	3,020,000	↓ 8.8%
92	Nantong	1,911,000	↑ 23.9%
21	New York/ New Jersey	7,585,819	↑ 1.5%
3	Ningbo-Zhoushan	28,720,000	↑ 4.3%
75	Oakland	2,461,262	↓ 1.6%
79	Osaka	2,352,250	↓ 4.2%
28	Piraeus	5,437,477	↓ 3.7%
12	Port Klang	13,244,423	↓ 2.5%
46	Port Said	4,009,672	↑ 9.6%
6	Qingdao	22,010,000	↑ 4.8%
47	Qinzhou	3,950,000	↓ 1.3%
81	Quanzhou	2,260,000	↓ 12.4%
34	Rizhao	4,860,000	↑ 8.0%
10	Rotterdam	14,349,446	↓ 3.1%
43	Salalah	4,340,000	↑ 5.6%
45	Santos	4,232,046	↑ 1.6%
38	Savannah	4,682,249	↑ 1.8%
53	Seattle/Tacoma	3,320,379	↓ 12.0%
1	Shanghai	43,503,400	↑ 0.5%
4	Shenzhen	26,550,000	↑ 3.0%
2	Singapore	36,870,900	↓ 0.9%
96	Southampton	1,809,237	↓ 6.0%
85	St Petersburg	2,099,649	↓ 5.5%
78	Sydney	2,395,773	↓ 0.2%
30	Taichang	5,212,000	↑ 1.2%
95	Taichung	1,821,000	↑ 1.5%
25	Tanger Med	5,771,200	↑ 20.2%
60	Tangshan	3,120,000	↑ 6.0%
15	Tanjung Pelepas	9,800,000	↑ 7.7%
48	Tanjung Perak	3,600,000*	↓ 7.7%
23	Tanjung Priok	6,870,400	↓ 9.6%
8	Tianjin	18,353,100	↑ 6.3%
44	Tokyo	4,261,793	↓ 5.5%
29	Valencia	5,428,307	↓ 0.2%
50	Vancouver	3,467,521	↑ 2.0%
68	Virginia	2,813,415	↓ 4.2%
14	Xiamen	11,410,000	↑ 2.6%
54	Yantai	3,300,200	↑ 6.4%
83	Yeosu Gwangyang	2,158,755	↓ 9.2%
27	Yingkou	5,650,000	↑ 3.1%
70	Yokohama	2,661,622	↓ 11.0%
94	Zhuhai	1,840,000	↓ 28.0%

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