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Linton Nightingale
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Recouping the losses

The latest count of annual teu figures across the world's elite container facilities reveals an industry back on track – but behind the scenes, congestion lingers

Following a torrid 12 months for container ports globally as the coronavirus pandemic sent shockwaves through the sector, 2021 saw the industry getting back on its feet.

Recouping volume losses from 2020 — in what was only the second time in history that throughput numbers have retracted, with the other occasion being the fallout of the global financial crisis — was number one priority.

As the world learned to live with the pandemic and economies started to open up once more, at least some normality returned to port operations and business picked up.

The One Hundred Ports that made the cut this time around achieved total volume growth of more than 7% and combined container liftings of 676.1m teu — a figure that more than made up for the 2020 downturn.

Growth was fragmented, though, and port performances split. North America — and, more specifically, the US — helped lead the revival.

Yet 2021 was another year marred by congestion and disruption. Supply chains continued to feel the strain. This took the gloss off an otherwise productive 12-month period for the world's container ports.

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Alphabetical listing of this year's entries



Congestion chaos: Volumes were on the up, but it was anything but plain sailing for the global container port sector.

Danny Lloyd / Alamy Stock Photo

Congestion chaos overshadows volume recovery

Box liftings accelerated at ports globally in 2021, yet the rebound from the Covid-induced slump came at a price. Ports and terminals felt the strain of sustained and unprecedented demand for containerised goods, while the logistical logjam that ensued put a dampener on an otherwise fruitful 12-month period

THE global container port sector was firmly in recovery mode in 2021, clawing back business lost during the height of the coronavirus pandemic as countries and their communities reopened, prompting a surge in demand for containerised goods.

Yet this surge in traffic came at a price.

Supply chain disruption was a dominant feature, as the cargo industry failed to make any real headway on the cargo backlogs that had escalated from the previous year.

With demand peaks still unpredictable, carriers fought an increasingly uphill battle to align equipment accordingly in what became largely a thankless task.

The logistical logjam was also not helped by

impromptu port closures due to sudden jumps in Covid infections — most notably in China, where draconian measures meant entire regions could be brought to a standstill, even amid the smallest outbreak. And, indeed, this proved the case.

Labour shortages at the quayside also slowed things down, as again outbreaks meant dockworkers were often taken ill or similarly isolating, depending on respective government guidelines.

Adding insult to injury was the rather ill-timed grounding of an ultra large containership in the middle of the Suez Canal.

Vessels traversing the east-west trades were held at either side of the waterway, while others opted for the long rote round the Cape of Good Hope to carry out their journey.



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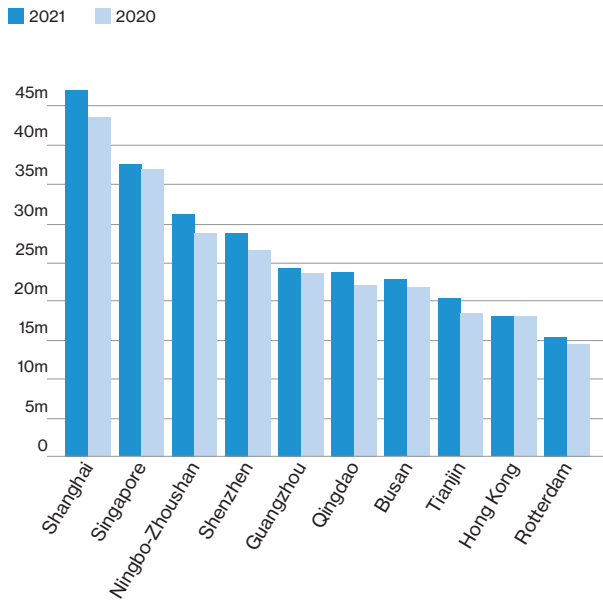
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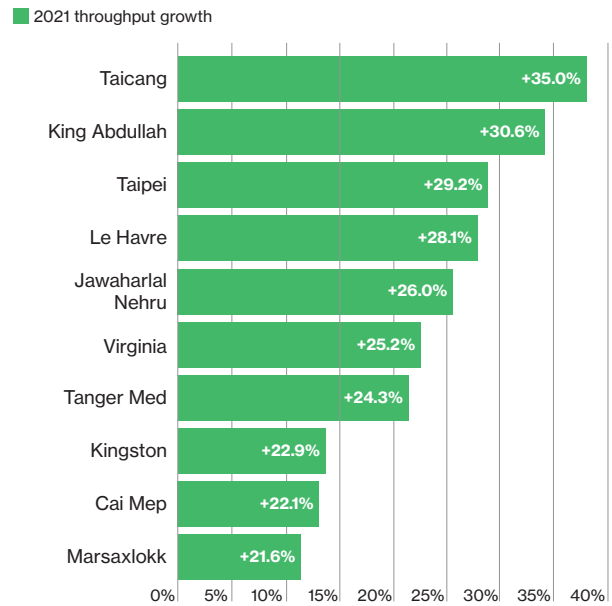
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Top 10 ports (2021 vs 2020 teu figures)



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

Largest throughput increases



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

An industry already on the back foot then found itself in as deep mud as the now infamous *Ever Given*.

North America — and, more specifically, the US west coast — bore the brunt of the congestion chaos. The region’s port majors were simply unable to cope with sustained strong demand in the face of labour shortages and growing inland haulage issues.

At its height, more than 100 vessels were anchored in the San Pedro Bay area, awaiting clearance to dock at terminals in Los Angeles and Long Beach.

However, as tailbacks in North America grew, the knock-on impact was felt globally.

Containers stuck in the US could not be returned to Asia, thus affecting exports to other regions.

As such, while 2021 will go down in the record books as a period of recovery for the global container port sector, in which the top 100 ports combined to post volume growth of 7.2% against 2020, trade during the year — much like the stricken *Ever Given* — was far from plain sailing.

Top 10

Shanghai laid claim to being the world’s largest container port in 2021, extending its reign at the top into a 12th successive year.

The Chinese colossus notched up throughput totals across the 12-month period just a nudge past 47m teu, up 8.1% on its 2020 total.

To put this into context, volume growth alone at Shanghai during 2021 was more than the total throughput that ports such as Southampton, Gdansk or even Oakland totted up throughout the year.

There is every chance that Shanghai could well become the first box port to hit the 50m teu mark in the coming years.

However, hitting such heights in 2022 seems implausible at this stage, considering the stop-start nature of operations so far, with Covid-related closures estimated to have cost the port as much as 1m teu in business between April and May alone.

Shanghai did, however, extend the gap to second-placed Singapore — a gap that stood at just shy of 10m teu in 2021.

Volume growth at PSA International’s flagship facility was rather muted, though box numbers still returned to pre-pandemic levels.

Nevertheless, the big news out of Singapore was the opening of the initial phase of the much-anticipated Tuas Port expansion, set to increase capacity at the world’s largest transshipment hub to as much as 65m teu, come 2040.

Propping up the top three once more was China’s Ningbo-Zhoushan, where volumes swelled more than 8%, having added no fewer than 27 new services over the course of 2021 to make it a trio of ports globally to top the 30m teu mark.

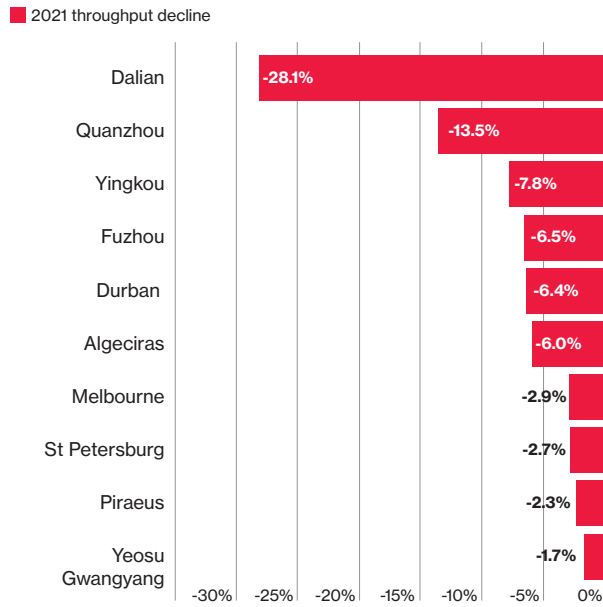
Making up the top five were Chinese compatriots Shenzhen and Guangzhou — holding onto their fourth and fifth places, respectively — with the former achieving the highest percentage jump in box business in 2021, up 8.4%.

This came despite the month-long closure of one of its key facilities, the Yantian International Container Terminal, in May of 2021.

In fact, it was also a case of ‘as you were’ for the remainder of the top 10 on 2021’s teu count.

Both Busan (7th) and Rotterdam (10th) returned to the growth trail, but Hong Kong (9th) — which had topped the One Hundred Ports rankings back in 2004 — saw volumes drop back for a fourth successive

Largest throughput declines



year, making it the only top 10 port not to achieve throughput gains in 2021.

Ahead of Hong Kong, in 8th position, Tianjin was the only top 10 port and Chinese major to witness double-digit percentage growth in 2021 — breaking the 20m teu threshold in the process — after adding a slew of new services calling markets centred largely around emerging economies.

China

Volume growth at Chinese ports carried on where it left off in the second half of the previous year in 2021, as the manufacturing powerhouse accelerated production to meet increasing demand globally for its exports.

Although China’s strict Covid stance brought significant disruption to ports and similarly to factory production, the country’s major gateways combined to achieve throughput growth of around 6% year on year.

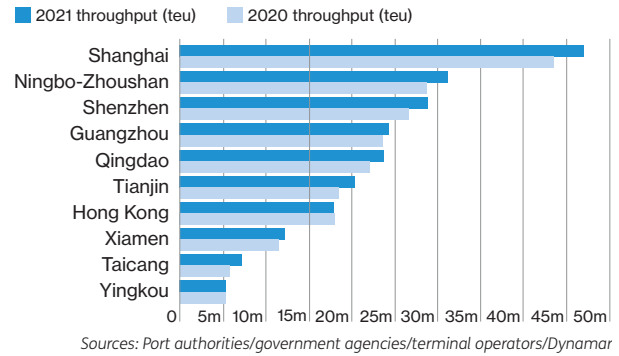
And although North America usurped China in terms of percentage growth, in terms of numbers, the country once again came out on top, weighing in with gains of around 15m teu over 2020’s tally.

China’s ports take up one-quarter of the top 100 ranking positions, and just under 40% of total teu trade — or 264.5m teu — handled by the world’s elite container facilities.

With the top 10 unchanged, it also meant that China still lays claim to having seven ports to its name among the 10 largest globally. As many as 16 Chinese ports held ranking spots in the top 50.

In short, China’s dominant role in global containerised trade continues unwavering. And, while there is evidence of further growth at ports

China’s top 10 ports in 2021



in Southeast Asia, as more companies set up manufacturing bases in the region, talk of a shift of production away from China is wide of the mark.

Volume growth at China’s three largest ports, Shanghai, Ningbo-Zhoushan and Shenzhen, all topped 8%, leading the industry’s recovery in 2021, while as many as seven of the country’s ports achieved double-digit percentage growth year on year.

This included Taicang, where volumes swelled by as much as 35% to more than 7m teu, taking the crown as the fastest-growing port among the top 100 on 2021’s teu count.

Taicang — which acts as the main feeder hub to sister port Shanghai — saw significant capacity upgrades pay dividends, drawing in several new services, mostly from Southeast Asia.

However, one Chinese port witnessed the largest drop in traffic in percentage terms.

Dalian topped the table of misery for a second successive year, with volumes falling back by a further 28.1% in 2021, as the port bore the brunt of trade frictions and Covid outbreaks in the Bohai Rim region.

Asia, excluding China

Asian ports outside of China bounced back strongly in 2021, achieving combined volume growth slightly below 7%. This helped to reverse the previous year’s Covid-induced shortfall and ensured volume growth across both years — or a compound annual growth rate — of nearly 4%.

Growth, though, was fragmented across the region and Covid once again had a part to play.

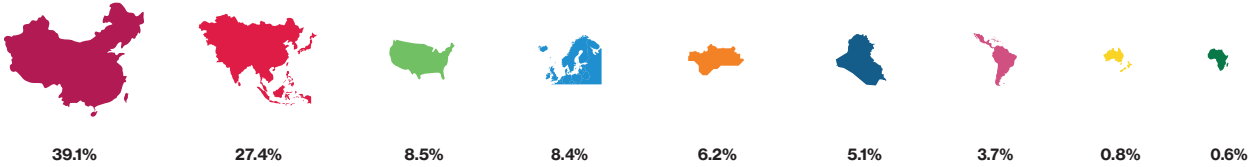
The three largest ports on the continent

Back on track

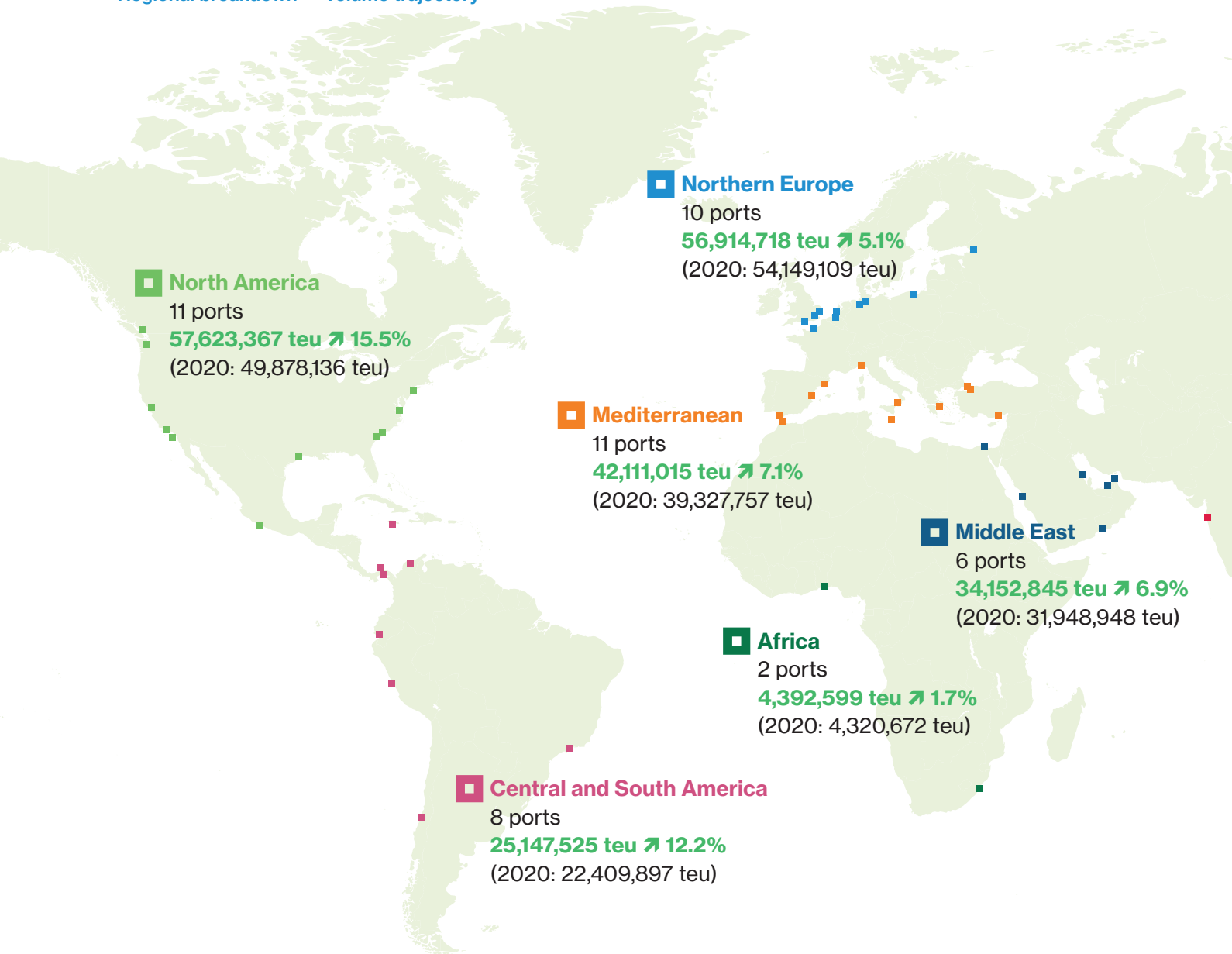
Breaking down the key statistics and figures from the rankings data as volumes rebound from the Covid-induced downturn

Regional share of top 100 volumes (teu)

■ China
 ■ Asia (excluding China)
 ■ North America
 ■ Northern Europe
 ■ Mediterranean
 ■ Middle East
■ Central and South America
 ■ Oceania
 ■ Africa



Regional breakdown – volume trajectory





676.1m teu

Volumes handled by the top 100 ranked ports in 2021



7.2%

Increase in volumes year-on-year



3 new entries

into the top 100



35%

Volume growth in Taicang, China, was the highest of all ports



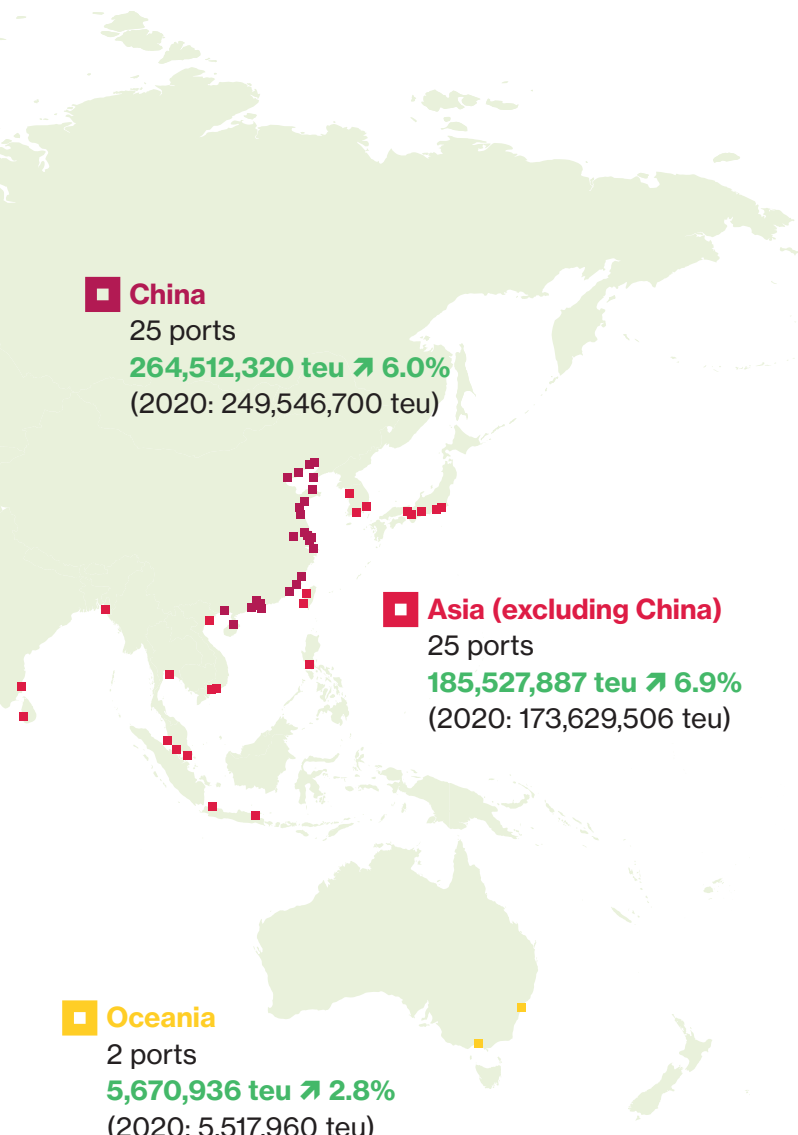
-28.1%

Dalian's drop in throughput was the sharpest decline for a second successive year



25

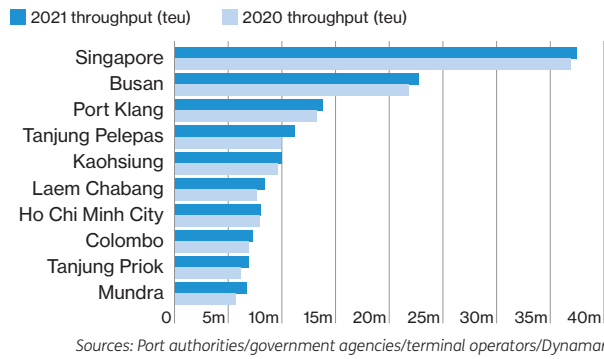
Chinese port entries



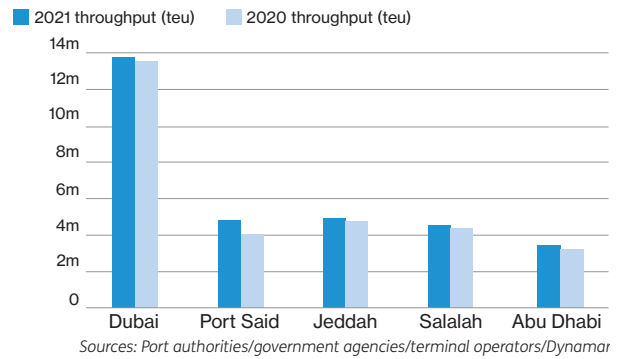
Teu by country



Asia's top 10 ports in 2021 (excluding China)



Middle East top five ports in 2021



— Singapore, Busan and Port Klang — all reported somewhat muted growth for 2021. This was in stark comparison to the majority of the Chinese juggernauts.

For Busan, although volume growth at 4% was the highest of the three, China's latest cabotage relaxation scheme continued to pose a challenge for the South Korean port, along with the underlying structural issues plaguing its legacy terminals.

Elsewhere, one of the biggest winners in the region was Vietnam's Cai Mep, where the opening of the new Gemalink terminal — in which CMA CGM has a 25% stake — spurred a 22% volume hike, as the country's booming manufacturing sector continued to drive exports.

The region's highest volume growth, though, came from Taiwan — or, more specifically, Taipei — reaping the rewards of congestion at the country's largest port Kaohsiung, resulting in numerous deviations to its terminals.

Big throughput gains were also reported in Malaysia's Tanjung Pelepas, Indonesia's Tanjung Priok and India's Jawaharlal Nehru.

The latter's compatriot port Mundra followed up 2020's volume increases — just shy of 20% — with a further 17.7% jump in box traffic, usurping Jawaharlal Nehru as the country's largest container facility.

Middle East

The big story at ports in the Middle East was a return to the growth trail for the region's largest port Dubai — or, as it is more commonly known, Jebel Ali — albeit of only around 2%.

This followed three consecutive years of volume declines and was a much-welcome development for

owner and operator DP World, having stemmed the tide.

Although Dubai's dominant position is not under threat — not at this stage, anyway — concerns will remain, as rivals in the region continue to see volumes climb at a faster rate.

Not least among these is neighbouring Abu Dhabi — buoyed by terminal tenants Cosco and Mediterranean Shipping Co, and soon to be joined by CMA CGM — which again saw throughput growth outstrip its domestic rival in 2021.

Saudi transshipment hub King Abdullah is another rapidly advancing port in the region. Acting as MSC's base in the Red Sea, it reported phenomenal growth in 2021 of more than 30% to numbers approaching 3m teu. This meant it was second only to Taicang as the world's fastest-growing port of the year.

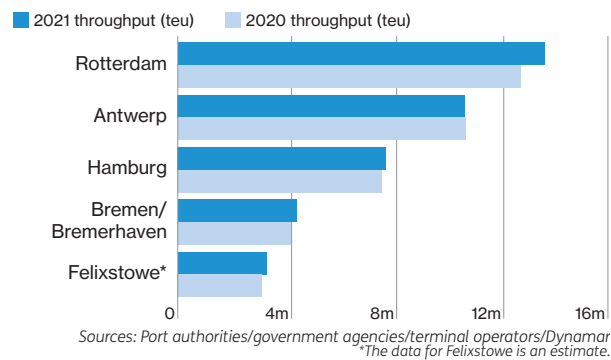
The other 'big mover' was Egypt's Port Said, amid yet another stellar performance for the Suez transshipment hub, despite the disruption caused by the grounding of the containership *Ever Given* in March 2021.

Volumes leapt up close to 19% to elevate Port Said in the rankings, while significant upgrades to infrastructure in the hinterland — particularly improved links to the capital Cairo — and at the quayside will likely see its throughput total climb further still in 2022.

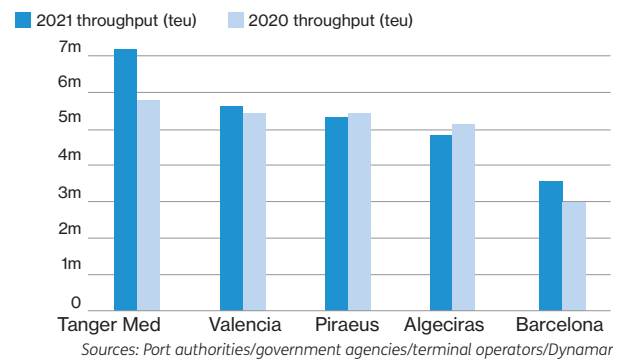
Northern Europe

Having witnessed the largest drop in percentage terms the previous year, Northern Europe's premier ports bounced back notably in 2021 to return to throughput levels slightly above those recorded pre-pandemic.

Northern Europe top five ports in 2021



Mediterranean top five ports in 2021



Combined growth of around 5.1% of the 10 ports featured in Lloyd's List's One Hundred listing ensured 2020's cargo losses were recovered, as the region's economies got back on their feet and consumer spending lifted volumes.

However, demand for containerised goods from Asia post-pandemic did cause operational headaches, with congestion an ongoing theme, as vessels diverted to avoid the worst-affected areas and carriers rationalised and reduced port rotations to suit. Naturally, some ports fared better than others.

Indeed, Antwerp failed to make any headway in 2021. Volumes stayed flat as congestion got the better of the Belgian port.

The Dutch port of Rotterdam was the major winner among the big three ports in the Helgoland Bay region, reporting the highest volume growth at 6.6%, increasing its market share in the process, while also staving off the competition to hold onto its global top 10 status.

Hamburg, meanwhile, clung onto its place in the top 20, reporting only moderate growth across the 12-month period.

Felixstowe and Bremerhaven managed to post gains above 5%, yet the biggest mover was France's Le Havre, where a near-30% volume hike came off the back of an additional 90 vessel calls due to congestion elsewhere in the northern range.

Mediterranean

Further south, ports dotted along the Mediterranean coastline reported mixed fortunes in 2021, amid familiar stories of boom or bust globally.

Congestion again took its toll — and with it, blank

sailings and service alterations undertaken by carriers. Nevertheless, transshipment in the region skyrocketed, ensuring regional volumes accounted for in the One Hundred Ports for 2021 grew by more than 7%.

The biggest benefactor was Moroccan mega hub Tanger Med, which, after taking the crown as the Mediterranean's busiest box hub in 2020, cemented its position in 2021 as liftings accelerated by nearly one-quarter year on year.

The ramp-up of extra capacity helped attract an array of new services from carrier clients, driving volumes up to more than 7m teu to propel Tanger Med into the global top 25. The fact Tanger Med only opened for business 15 years ago means this is quite a phenomenal achievement.

While Maltese transshipment hub Marsaxlokk did not quite match the heights of Tanger Med, growth of more than 20% was again nothing to be sniffed at, as it welcomed a string of new regular services to its docks, including that of major stakeholder CMA CGM.

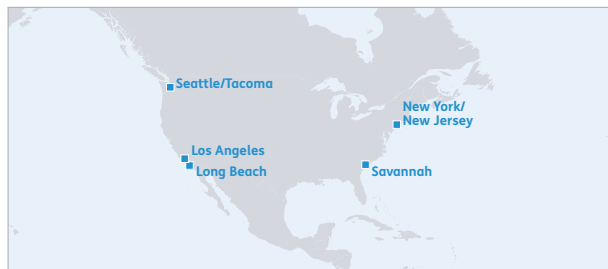
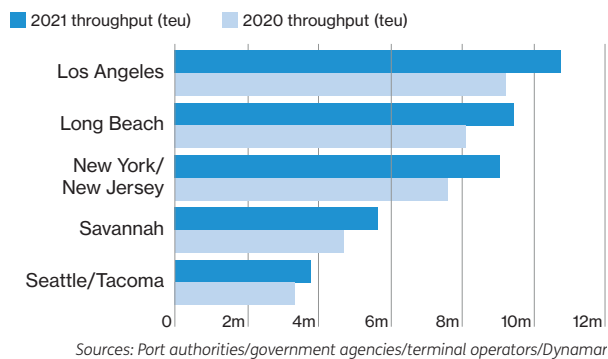
On the flipside, it was a disappointing year for Piraeus, reporting its second successive year of volume declines, down 2.3% to 5.3m teu, to fall further behind Tanger Med.

However, Cosco is still adamant that it is aiming to elevate volumes at the eastern gateway to the European Union to nearly double its current throughput tally to as much as 10m teu in the coming years.

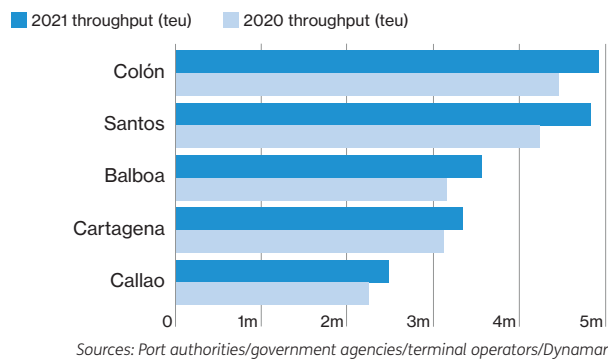
North America

All but one of North America's ports reported a jump in liftings for 2021, in what was a bumper year for the region.

North America top five ports in 2021



Central & South America top five ports in 2021



The flood of containers heading eastbound on the transpacific trade ensured North America was the fastest-growing region too, in percentage terms, notching up combined volume growth of an impressive 15.5% — a figure that more than compensated for the slight drop recorded the previous year.

Yet as throughput figures rocketed to record levels, so too did congestion — particularly on the US west coast, a situation only compounded by labour shortages and inland haulage issues. Ports and terminals were tested to the limit, but so too was the patience of shippers.

Nevertheless, it was a record year for the majority of North America’s gateways.

Breaking the norm was Oakland, as the only port to witness a fall in its 2021 tally on the prior year, though it still reported the highest number of imported containers in its history.

The struggle to return empties and shift exports from its clogged quays led to significant disruption at Oakland, and inevitable service cancellations.

Elsewhere, though, was a box bounty. In the US, every other port reported double-digit percentage gains.

Los Angeles held onto its crown as the largest North American port, surpassing the 10m teu mark for the first time in its history. Volumes here jumped nearly 16% — a feat repeated in neighbouring Long Beach.

New York/New Jersey, Savannah and Seattle/Tacoma (under the guise of the Northwest Seaport Alliance) reported throughput hikes of 18.5%, 19.9% and 12.5%, respectively.

Virginia, though, took the claim of the region’s

fastest-growing port, as liftings increased by more than one-quarter on 2020’s count.

Central and South America

The Central and South American region was second only to North America in terms of overall growth in 2021, chalking up a combined tally 12.2% higher than 2020.

Every single port in the region finished 2021 with numbers higher than the previous year, including San Antonio in Chile and Kingston, Jamaica, both making a return to the Lloyd’s List rankings after a year’s hiatus.

Kingston witnessed growth of almost 23%, having tied down several new regular services to its docks. The capacity to accommodate ultra large containerhips at the port is proving popular with carriers, given the transshipment opportunities on offer.

San Antonino just sneaked back into the top 100 after the DP World-operated port achieved a hefty jump of more than 17% in teu year on year, as volumes rebounded strongly post-pandemic.

Similarly, the transshipment hubs either side of the Panama Canal enjoyed a fruitful 2021, with box business rejuvenated as economies came out of lockdown.

Colón and Balboa both saw volumes increase by more than 10%, where business was also buoyed by the strength of demand for containerised goods in the US.

Carriers looked to the two ports to help alleviate pressure at US ports and act as essential holding pens for cargo during the height of congestion further north.



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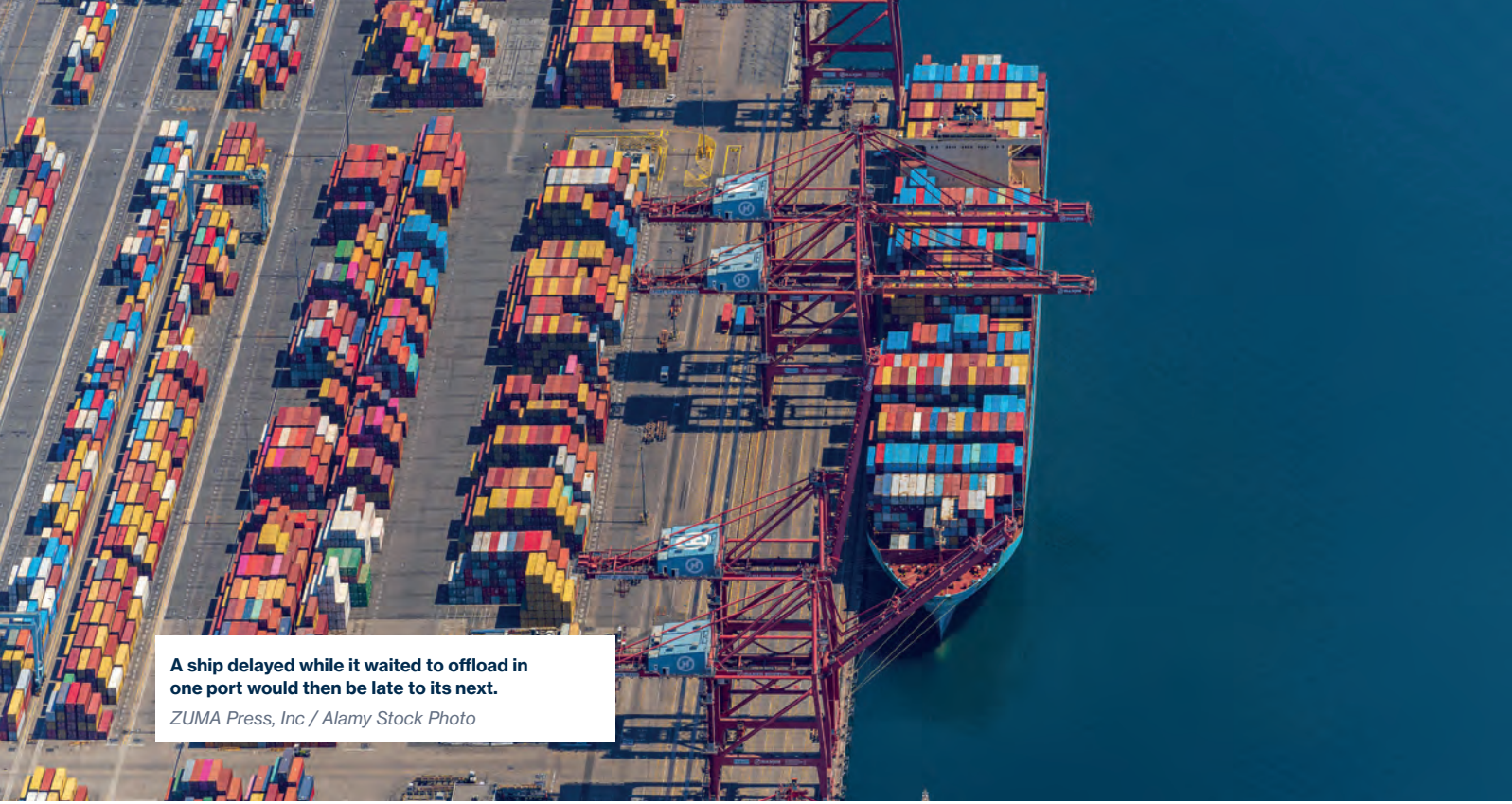
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A ship delayed while it waited to offload in one port would then be late to its next.

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Carriers thriving amid supply chain disruptions

Few parts of the supply chain enjoyed the disruption of 2021 — but for container lines, capacity shortages led to a lucrative year

CONTAINER lines continue to ride high off the chaotic circumstances that have surrounded the box shipping sector for the past two years.

After a record-breaking year for the sector in 2021, box carriers are continuing to profit at unprecedented levels on the back of strong demand and high freight rates.

Alongside a pandemic-driven boost in demand as consumer buying patterns changed, which increased demand for containerised freight, carriers also faced a lack of capacity. With demand far outstripping supply, rates were only going to go in one direction.

Moreover, shippers, who had experienced capacity shortages that left them unable to book cargoes, were keen to secure slots by signing up to long-term contracts at whatever price was charged. This has ensured the returns for carriers will not be short-lived.

The capacity crisis was driven not by a shortage of ships or containers, but by a slowing of the conveyor belt of boxes that usually flows around the world without hindrance.

When this flow became disrupted — as it significantly was in 2021 — more containers and slots were required to carry the same amount of cargo.

The major hurdle container lines faced was simply getting ships into ports and having their cargoes

removed. Port congestion became the defining factor of 2021.

At its peak, congestion led to more than 100 ships left waiting off San Pedro Bay for berths at Long Beach and Los Angeles — some for several weeks.

It was these ships, and others like them around the world, that were going nowhere and moving nothing.

This led to a knock-on effect of carrier schedules not being worth the paper on which they were written. A ship delayed while it waited to offload in one port would then be late to its next. This, in turn, made life tricky for terminals.

Ships would either not arrive, or arrive all at once. When they did, huge volumes of cargo were suddenly offloaded onto terminal yards.

This increased the yard density, which meant a juggling act was required to then evacuate containers out of the yard and into the hinterland supply chain.

The blame game started in earnest, with carriers blaming ports for being congested and ports blaming carriers for irregular schedules. Both were correct, but neither was really at fault.

The real issues lay beyond anyone's control. High consumer demand had coincided with a period of labour shortages caused by the pandemic. There were also



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structural issues in supply chains, particularly in the US, that meant they simply could not cope with volumes growing by more than 10% a year.

Shortages of warehousing, trucking and rail capacity all pushed cargo blockages back to the ports — who, like the carriers, were doing all they could to keep boxes moving.

Since congestion peaked on the US west coast in January 2022, there have been some signs of easing. At the time of writing in late July, San Pedro Bay had fewer than 30 ships queuing to get into Long Beach and Los Angeles, although extended rail dwell times persist.

However, on the US east coast, the situation has worsened. Fears of industrial action, and hopes of faster delivery, saw a move from west to east coast terminals, which has simply relocated the problem.

In Europe, high density, combined with increasing industrial disquiet among hard-pressed workers, has led to growing congestion in 2022, despite demand easing back significantly.

And China still remains a cause of concern, as the ripples of various pandemic measures move across global supply chains.

Container carriers now faces additional challenges.

Perhaps one of the biggest threats has been the impact of the war in Ukraine.

While having little direct influence on container shipping, given the low volumes shipped to and from both Russia and Ukraine, the effect of the war on the global economy could prove to be the biggest threat to box shipping over the second half of the year.

Sanctions on Russia have sent energy prices soaring, with the twin impact of raising operating costs for lines through higher bunker prices, and driving inflation in the world's economies.

The excess demand seen during the first two years

The surge in profits over the past two years has sent carriers and owners racing to the yards to buy new tonnage, much of which will be coming on stream just as the potential slowdown in demand occurs

of the pandemic is now set to taper off, with both the International Monetary Fund and the World Bank revising down the lower ranges of their estimated global gross domestic product growth forecasts.

If inflation, as expected, does put pressure on consumers, then demand for containerised freight will slow further as well.

The surge in profits over the past two years has sent carriers and owners racing to the yards to buy new tonnage, much of which will be coming on stream just as this potential slowdown in demand occurs.

There is 7m teu of capacity on order — or 30% of the existing fleet capacity — and, while forecasts for demand growth over the next couple of years are in the sub-3% range, in 2023, the fleet will grow by 7%.

If this coincides with an easing of congestion, which is still taking up around 10% of capacity, then the spectre of overcapacity emerges again — at least in the short term.

Box carriers will no doubt continue to do well for the foreseeable future, but the picture is changing.

Nevertheless, much of that will depend on the ongoing role congestion at ports continues to play in the supply chain.



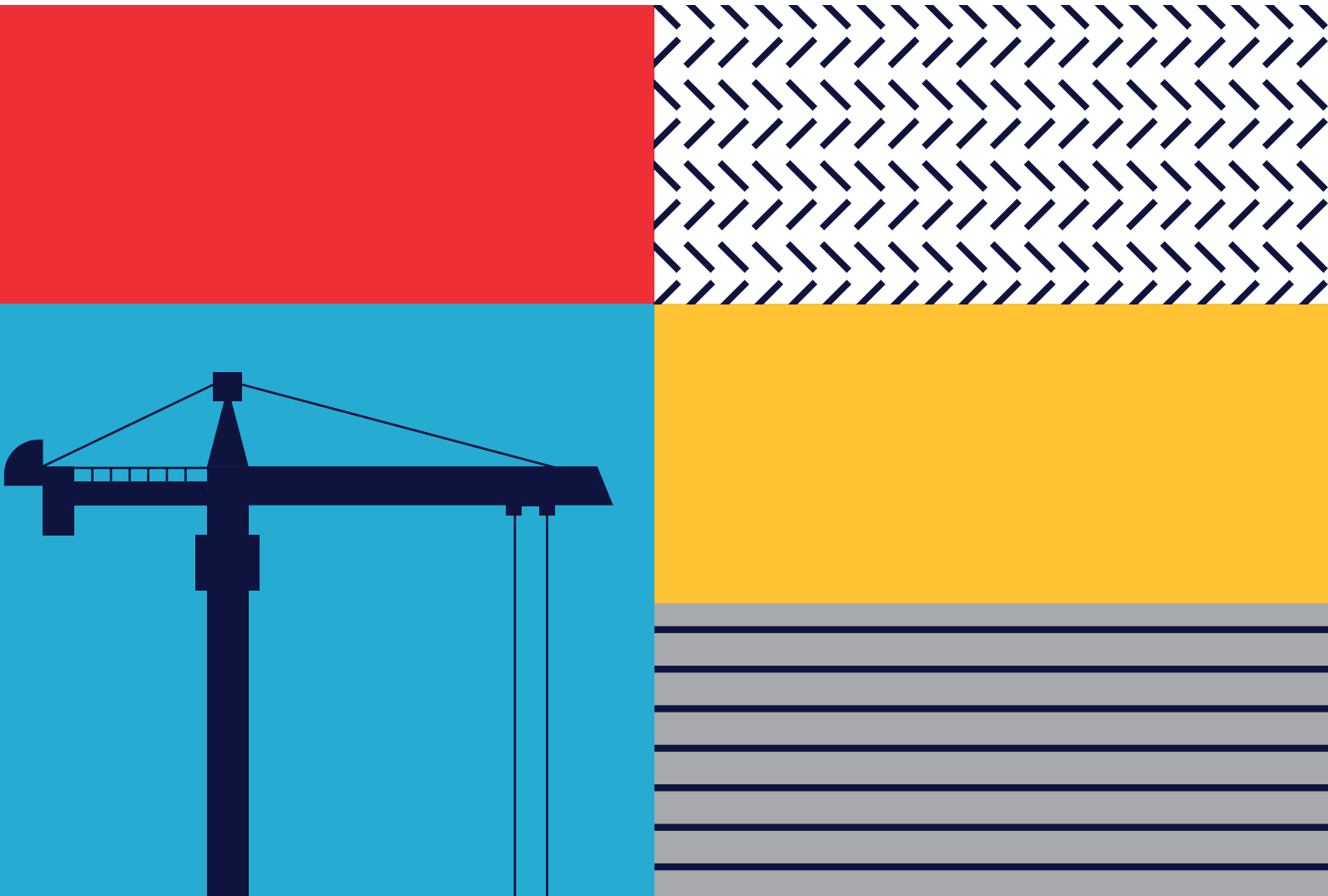
The war in Ukraine could prove to be the biggest threat to box shipping in the second half of 2022.

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Puertos del Estado





US congestion has switched from the west coast to the east in recent months.

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An end to congestion?

A slowdown in the global economy could provide breathing space for container shipping to finally free up clogged supply chains, while bringing much-needed relief to the long-suffering port sector

REWIND 12 months and industry consensus was that congestion clogging container shipping supply chains and ports globally should start to ease by early 2022.

Fast-forward to now, and it is a case of ‘as you were’ — with the ‘consensus’ now being that it will not be until early next year at the very soonest that box shipping finally gets a handle on the situation.

In defence of the industry, the situation has been far from normal. The fallout of Covid has led to unprecedented demand peaks — and likewise demand slumps — while impromptu lockdowns the world over, as well as labour shortages at the quayside and equipment shortfalls, have all contributed to the supply chain carnage.

Russia’s invasion of Ukraine earlier in 2022 was yet another of the growing list of ‘black swans’ that have beset container shipping over the past 18 months.

However, the saving grace — if you could call it that — this time round is the ongoing economic slowdown, which could prove to be the crucial link in events to provide the much-needed respite to alleviate supply chains.

The OECD, the International Monetary Fund, Oxford Economics and the likes have all been hurriedly

downgrading economic forecasts in 2022 as increasingly gloomy developments give rise to further risks.

Higher-than-expected inflation worldwide — most notably in the US and major European economies — has triggered tighter financial conditions, noted the IMF in its end-July forecast.

Further, a worse-than-anticipated slowdown in China, reflecting Covid outbreaks and lockdowns, plus additional negative spillovers from the war in Ukraine have all jolted a world economy already reeling from the pandemic.

Understandably, such developments have altered projections for global container throughput in the short to medium term.

London-based consultancy Drewry has significantly lowered its forecast for volume growth in 2022 since the start of the year.

Current projections are for container liftings at ports globally to climb by 2.3% in 2022, against the 6.8% growth recorded in 2021. Muted volume growth is expected to continue through to 2026, in the 2%-3% range.

However, further downward revisions are expected,



according to senior analyst Eleanor Hadland. “Although we’ve had recovery from Covid, we’re now starting to see macroeconomic and geopolitical headwinds step up,” she says.

“The impact of inflation has been driven higher and harder by the Russia/Ukraine crisis. Obviously, we’ve also seen inflated energy costs and we’re already starting to see food costs going up.”

The likelihood is that this will take a large chunk out of consumer demand for discretionary spending. And with the service industry also now back in full swing, this too will likely put a further pause on the spending on goods, Ms Hadland explains.

In the first half of 2022, the double whammy of the Russian invasion of Ukraine and continued disruption at Chinese ports due to coronavirus-prevention measures has already had a negative bearing on volumes globally.

Although throughput numbers picked up in May and June, several of China’s major ports reported a drop in liftings for the first six months of 2022, including Shanghai, Guangzhou and Hong Kong.

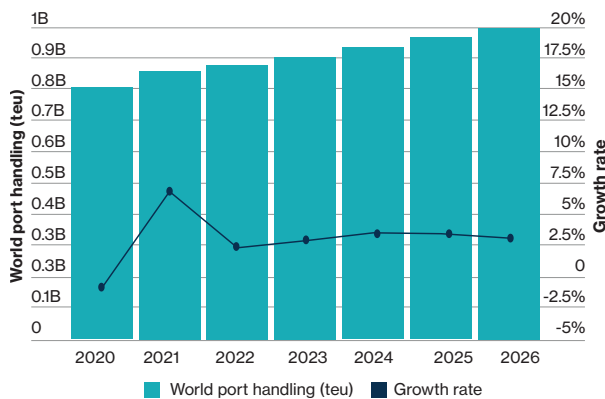
There were gains at other ports — most notably in Ningbo and Shenzhen — but these came largely from cargo being diverted due to lockdown restrictions in other parts of the country.

In Europe, the war in Ukraine has understandably had a significant impact on port traffic in the Baltic and Black Sea regions, while volumes across the rest of the continent have also suffered.

Meanwhile, in North America, ports on the US west coast reported little if any growth for the first half of 2022. Instead, growth was reserved for the ‘less-congested’ ports on the US east and Gulf coasts, as carriers looked to move import cargoes through its gateways to avoid backlogs on the west coast. This was, of course, before they too succumbed to inevitable congestion of their own.

Elsewhere, much of the Middle East, Africa and the Far East outside China has also witnessed sluggish or a lack of growth through the first half of 2022.

Forecast development of world container port throughput



Source: Drewry Maritime Research

Top 10 ports: 2022 half-year volumes

| Ranking | Port | Country | Region | 1H 2022 (teu) | 1H 2021 (teu) | % increase/decrease |
|--------------|-----------------|-----------------|-----------------|--------------------|--------------------|---------------------|
| 1 | Shanghai | China | Asia | 22,540,000 | 22,889,100 | ▼ 1.5% |
| 2 | Singapore | Singapore | Asia | 18,407,000 | 18,730,000 | ▼ 1.7% |
| 3 | Ningbo-Zhoushan | China | Asia | 17,470,000 | 16,070,000 | ▲ 8.7% |
| 4 | Shenzhen | China | Asia | 14,400,000 | 13,760,000 | ▲ 4.7% |
| 5 | Qingdao | China | Asia | 12,470,000 | 11,600,000 | ▲ 7.5% |
| 6 | Guangzhou | China | Asia | 11,740,000 | 11,770,000 | ▼ 0.3% |
| 7 | Busan* | South Korea | Asia | 11,172,000 | 10,740,000 | ▲ 4.0% |
| 8 | Tianjin | China | Asia | 10,520,000 | 10,300,000 | ▲ 2.1% |
| 9 | Hong Kong | China | Asia | 8,399,000 | 8,708,000 | ▼ 3.5% |
| 10 | Rotterdam | The Netherlands | Northern Europe | 7,278,000 | 7,212,000 | ▲ 0.9% |
| Total | | | | 134,396,000 | 131,779,100 | ▲ 2% |

Source: Dynamar *Estimated based on Q1 2022 figures

Indeed, pockets of strong growth in Southeast Asia, particularly India, have done little to mask the trend of an overall slowdown of growth in port activity globally.

Vespucci Maritime chief executive Lars Jensen also highlights the notable absence of a ‘peak season’ — which, he says, should already be in full swing, given heavily congested supply chains.

While he says you cannot rule out consumers suddenly buying again in the lead-up to China’s Golden Week in early October, the ‘peak’ has come and gone.

“If you look at freight rates, for example, they ‘peaked’ in peak season last year and have been in decline ever since. We had a spike this year around Chinese New Year — as you always do — but over the past few months, we’ve been deviating more and more towards a seasonal downturn,” says Mr Jensen.

“Sometime in 2023, we will be back to normal; it’ll be a bumpy ride, but that’s where we are right now.”

Given the current level of muted volume growth, the concern for the container shipping industry is that if it cannot remedy the congestion issue even in this environment, it could still be some time before it is resolved.

Mr Jensen says the only comparable situation we have is that of congestion on the US west coast in 2015. This took around eight months until the industry got back on its feet.

“The problem with using this as a parallel is we should, to some degree, have seen [congestion] fixed already. It’s not getting worse, certainly not. But it’s not really getting better either. In the US, it’s just

sort of muddling along — and in Europe, it’s also not improving,” he explains.

The irony too, he says, was that all eyes in the first half of 2022 were fixed on the US west coast, to see how contract negotiations between port operators and the International Longshore and Warehouse Union would pan out.

The fear was that a breakdown in talks and subsequent strikes or port lockouts would add further fuel to the congestion fire. Fortunately, dialogue has seemingly been very constructive.

Meanwhile, port strikes are becoming an all-too-common scene at ports across Europe.

“This is certainly not helping matters. If you look at the main driver behind the strikes, for port workers, truck drivers and rail operators, it is the same: inflation. They all want a greater salary,” says Mr Jensen.

With inflation still rising, the threat of further strikes cannot be discounted. Yet rising inflation could also prompt civil unrest, such as that already witnessed in Sri Lanka. Although perhaps not always as extreme as this, the risk cannot be ignored.

And with the situation in Ukraine still of grave concern, along with China and the US stoking tension in Taiwan — even before considering the fact we are still in the middle of a pandemic — there are plenty of variables at play that could quickly unravel to bring further trepidation to the global supply chain.

While hopes are pinned on fixing congestion come 2023, it can certainly not be ruled out that by this time next year, the industry will still be looking to the following year for the backlogs to be clear.

Inflationary pressures could squeeze operator margins

Container port operators have thus far managed to keep cost controls in check in the face of unprecedented congestion, but the pace of inflation could soon put profit margins under pressure.

Drewry’s Eleanor Hadland says that in 2021, global port operators were able to increase margins, as they were able to offset the costs of congestion by additional revenues stemming from disruption, such as storage charges and dwell fees.

“While operators have done a lot of work on cost control during Covid — using digitalisation, too, to improve and enhance operational issues — they’ve also been able to charge back the carriers for some of the disruption,” she says.

However, as congestion eases, that revenue will not necessarily be as “sticky”.

“Because it’s a discretionary spend on storage, if dwell time comes down from 10 days to five days, you’re losing that,” she explains.

Yet with inflation moving so quickly, the energy price and labour costs will soon add further pressure to margins.

While most will have inflation built into annual Terminal Service Agreements with carriers, Ms Hadland says once storage revenues fall away, “the industry will be left with pressure on its two major cost items — and only limited pricing power on the basis of an annual contract”.

In response, she expects some of the leading operators to look further down either the sustainability or digitalisation routes — measures that are generally ebitda-positive, with relatively short payback.

Port strikes witnessed globally are, though, already a sign of the labour cost pressures in the market — and, with energy prices only expected to rise in the coming months, the squeeze on port operator margins could become increasingly tight.

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Ships docked at New York / New Jersey in 1973, when the US port was the world's largest.

Hum Images / Alamy Stock Photo

The numbers tell the story

The development of container port throughput figures from the early-1970s through to today chart the rise and success of containerisation. From the early transatlantic traders to East Asia's manufacturing boom, and from the industry's 'golden age' to China's rise to prominence, it is a story 60-plus years in the making

Lloyd's List's record of global container throughput totals stretches as far back as 1973. Comparing the ports that held the top-ranking positions nearly half a century ago with those of today, the regional variation is immediately apparent. Yet perhaps even more striking is the astronomical rise in port volumes.

Charting the fate and fortunes of the world's elite container facilities over the decades is reflected in the changing face of containerisation.

Although the idea of putting goods into a container is centuries old, it was not until the late-1950s that the concept of 'containerisation' with which we have become accustomed was born.

When Malcom McLean converted the first commercially successful containership, *Ideal-X*, in 1956, it was the inception of an industry that opened new markets and gradually connected just about every corner of the world to the global economy.

Containerisation has undertaken a significant role in the rise of globalisation, evolving into a seamless, interconnected, intermodal freight system that dramatically reduced the cost of shipping goods internationally, spurring the post-Second World War boom in international trade and allowing the age of consumerism to prosper.

The container ports dotted along the coastlines of major cities and population arteries globally, provide the vital link between land and sea. Like the thousands of ships they serve, the ports too have grown in size and magnitude

as ocean volumes and the container industry's reach has steadily risen over the past 60-plus years.

Although Lloyd's List's figures do not recount containerisation in its entirety, it was not until the late-1970s that ports' handling figures were consistently measured.

In the early years, numerous ports would report all containers; others included just loaded volumes; while some would use different methods of counting odd-sized containers, or those not of the standard 20 ft or 40 ft variety, which would often skew reported totals.

Further, these initial figures pick up the story when the industry had already started to make headway and intercontinental box trade was in its fledgling years.

Volume development thereafter depicts the rise of manufacturing powerhouses, the industrialisation of nations, economic progress, and the geopolitics and government policies that have shaped the dynamics of containerised trade.

Setting the standard

After container shipping's trailblazer *Ideal-X*, ships carrying containers soon started to operate up and down the US Atlantic and Gulf coasts.

Renowned historian, economist and author Marc Levinson recalls to Lloyd's List how similar experiments took place a few years later on the US west coast, from California to Hawaii, but also from the US east coast to Puerto Rico. Crucially, he explains, these were routes to

destinations that did not compete with the railroads. However, it was not until the 1960s that containerisation expanded beyond the US and its territories intercontinentally.

Critical to this development was the standardisation of the container, at first in the US, but then with Western Europe and Japan, and eventually through the International Organization for Standardization, where an agreement was reached on the 20 ft and 40 ft standard sizes, or today's ISO containers, explains Mr Levinson.

"This agreement made it possible to be confident that one could ship a container anywhere in the world. Any containership would be able to handle it; and a crane in any port, or rail yard. That really set the stage for the expansion of container shipping internationally."

Standardisation was also important as it freed up capital. Whereas previously private capital was extremely reluctant to invest in an industry without such metrics, the money soon flooded into the industry and container shipping quickly accelerated.

This helped drive transatlantic trade in the 1960s — so much so that breakbulk shipping across the Atlantic effectively evaporated in the space of just a few years.

Container ports began springing up across Northern Europe to serve this burgeoning trade, including in Rotterdam, London and Bremerhaven, while container shipping's port pioneers on the US Atlantic and Gulf coasts grew in stature.

By the time Lloyd's List started to record container volumes on an annual basis in the early-1970s, volumes were still largely concentrated on ports on either side of the Atlantic.

In 1973, the world's largest port at the time, New York/New Jersey, handled just over 1.6m teu — double that of its closets rival Rotterdam. New York/New Jersey was one of seven US ports — eight, if including Puerto Rico's San Juan — making up the top 20 largest ports.

A further seven spots were taken by Northern European ports, but — and in stark contrast to today — only four from Asia.

Interestingly, Melbourne was also among the world's top 10 container facilities, as one of the early adopters of containerisation, having begun regular European services in the late-1960s.

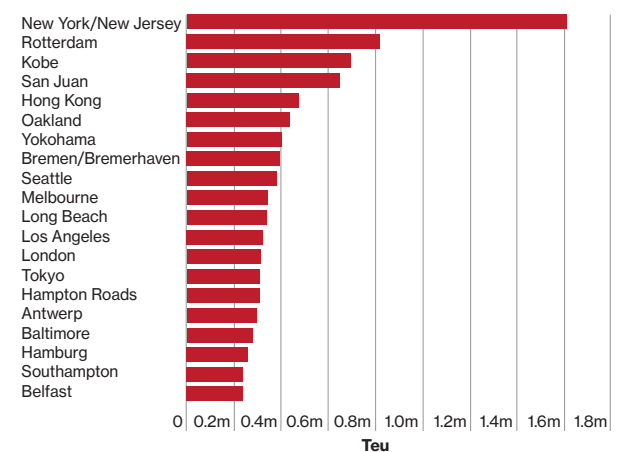
Eastern promise

Asia came late to the initial box party. The political situation in China meant it was effectively isolated, so commerce between other nations was minimal, says Mr Levinson.

South Korea, although industrialising — exporting apparel and similarly low-value goods to ramp up its manufacturing sector — was still very much a labour-intensive economy, he adds.

"Meanwhile, the US was engaged in war in Vietnam, Cambodia and Laos in the early-1970s, so there was effectively no foreign trade from those countries. Many countries such as India had pursued autarkic economic

Top 20 ports - 1973



Source: Lloyd's List, Containerisation International, CI Yearbooks

strategies, so there was not a great deal of foreign trade there. Essentially, the North Atlantic is where it was at."

Containerisation in Asia did not really kick off until, once again, Malcom McLean drew attention to what intermodal freight could achieve with the first container shipping across the Pacific.

Mr McLean, who ran Sea-Land Services at the time, was awarded a contract by the US Department of Defense to run containerships from California to a port that he built in Cameron Bay, as a way of straightening out the highly publicised logistical problems of the US military in Vietnam, says Mr Levinson. It was an overwhelming success.

"His contract was for carrying goods from the US to Vietnam. There was no backhaul. So he hit upon the idea of stopping in Japan for backhaul — and that was more or less the beginning of the large import surge from East Asia to the US."

Over time, trade across the transpacific and with Western Europe from East Asia began to displace North Atlantic container trade.

In the early-1980s, although major ports in the US and Northern Europe were still clocking up some of the largest annual throughput figures — with Rotterdam as the world's largest port, having usurped New York-New Jersey — East Asian ports began to grow rapidly.

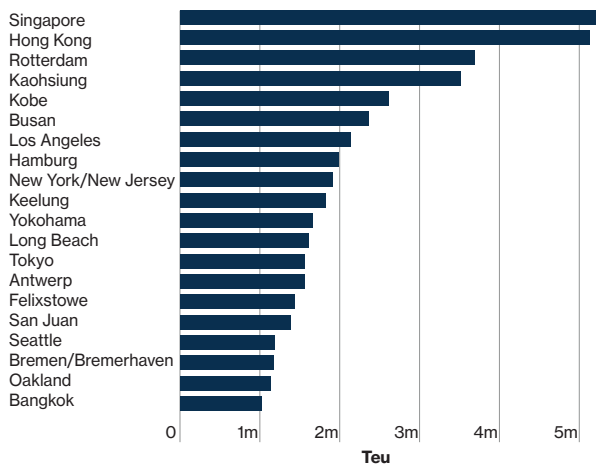
The manufacturing boom in East Asia saw ports such as Japan's Kobe and Yokohama, Kaohsiung in Taiwan, as well as Busan, South Korea, come to the fore.

Singapore was also on the rise. Mr Levinson explains how the country was vastly impacted by Britain's decision in the early-1970s to withdraw troops from its military bases in Southeast Asia.

Singapore built vessels and maintained a good part of the British fleet, so the country was devastated when Britain closed the docks — and the political leadership had to figure out something else to do to maintain its economy pretty quickly.

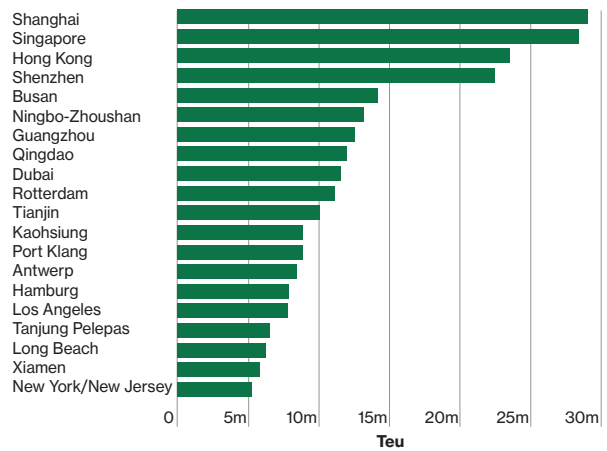
"So transshipment and servicing for vessels passing through [the port] were natural things for Singapore to focus on," says Mr Levinson.

Top 20 ports - 1990



Source: Lloyd's List, Containerisation International, CI Yearbooks

Top 20 ports - 2010



Source: Lloyd's List, Containerisation International, CI Yearbooks

Transshipment was not common in the breakbulk era, but this became feasible through the rise of container shipping. Singapore saw an opportunity to become a transshipment hub for regional trade that could bring huge benefits to its economy — a model that has since been replicated and proven successful the world over.

Singapore's success in the transshipment market saw its port grow to be the largest globally for periods in the 1990s and at the start of the 21st century. Indeed, Singapore has remained among the top two busiest box ports from 1988 through to this day.

The rise of Singapore coincided with that of Hong Kong, which also enjoyed several stints at the top of the throughput tree during this period.

Before China began to open its economy a little in the 1990s, Chinese exports were carried to Hong Kong, which essentially became its trade gateway to the world.

Although there was a lot of manufacturing in China, Hong Kong was one of the original outsourcing locations for both Japanese and US industry, adds Mr Levinson.

Golden age

The 1990s signalled the start of container shipping's 'golden age', as global trade took off. More and more goods were traded economically, and manufacturing across developing nations in East Asia grew exponentially.

Cheap labour was, of course, crucial, but containerisation made shipping goods manufactured in East Asia economically viable.

Western consumers could not get enough of the easily affordable TVs and other household appliances, clothes, footwear and furniture shipped from the other side of the world. Container port volumes went through the roof.

In 1990, figures published in the Containerisation International Yearbook show annual global container throughput at below 100m teu; by the start of the 21st century, it had more than doubled to a figure approaching 250m teu.

The success of containerisation in the 1990s did not escape the attention of China, where much discussion had

taken place as to how it could capitalise on this expanding industry.

Although Shanghai became a top 10 port towards the end of the decade, the absence of Chinese representation at the upper echelons of the throughput tables before then is striking. In the late 1990s, China invested heavily in port infrastructure. Huge container terminals were developed up and down its coastlines in support of thriving export trade, buoyed by its burgeoning manufacturing sector and cheap labour market. China became the factory of the world.

Fast-forward to 2010, and Shanghai had replaced Singapore as the world's largest container port — where it remains to this day — and no fewer than six Chinese ports were among the biggest in annual throughput terms.

China's rise to prominence at the start of the century came as container trade continued to accelerate. Global supply chains had evolved to become more intricate and inclusive, supporting the rapid growth of e-commerce.

Indeed, for most of the so-called 'noughties', box throughput totals continued to outpace GDP growth, as in previous decades. By the end of that decade, however, container throughput levels had surged to more than 500m teu per annum.

The only blip came in 2009, when the global financial crisis led to the industry registering its first annual fall in throughput since inception — a feat only repeated once since then, during 2020's Covid-induced downturn.

Yet the crisis also marked a period of more moderate growth — more in line with global economic growth — in a trend that has largely continued through to today.

In terms of container trade dynamics, the big story from a port sector perspective over the past 20 years, though, is the sustained dominance of China, developing in tandem with its meteoric economic rise.

Today, China's ports make up seven of the top 10 largest ports, one-quarter of the top 100, while volumes handled at Chinese container facilities represent more than 40% of total trade handled by the 100 ports in the latest rankings.

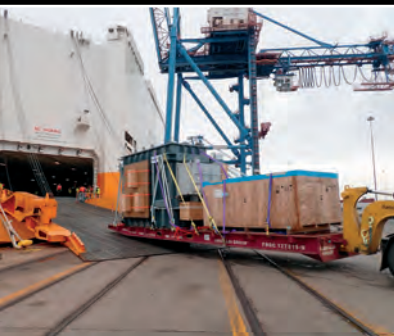
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The Top 100 ports by throughput in 2021

| Ranking | Port | Country | Region | 2021 annual throughput (teu) | 2020 annual throughput (teu) | Annual % change |
|---------|-------------------------------|----------------------|-------------------------|------------------------------|------------------------------|-----------------|
| 1 | Shanghai | China | Asia | 47,030,300 | 43,503,400 | ↗ 8.1% |
| 2 | Singapore | Singapore | Asia | 37,470,000 | 36,870,900 | ↗ 1.6% |
| 3 | Ningbo-Zhoushan | China | Asia | 31,070,000 | 28,720,000 | ↗ 8.2% |
| 4 | Shenzhen | China | Asia | 28,767,600 | 26,550,000 | ↗ 8.4% |
| 5 | Guangzhou | China | Asia | 24,180,000 | 23,505,300 | ↗ 2.9% |
| 6 | Qingdao | China | Asia | 23,710,000 | 22,010,000 | ↗ 7.7% |
| 7 | Busan | South Korea | Asia | 22,706,130 | 21,824,000 | ↗ 4.0% |
| 8 | Tianjin | China | Asia | 20,269,400 | 18,353,100 | ↗ 10.4% |
| 9 | Hong Kong | China | Asia | 17,798,000 | 17,953,000 | ↘ 0.9% |
| 10 | Rotterdam | The Netherlands | Northern Europe | 15,300,000 | 14,349,446 | ↗ 6.6% |
| 11 | Dubai | United Arab Emirates | Middle East | 13,742,000 | 13,488,000 | ↗ 1.9% |
| 12 | Port Klang | Malaysia | Asia | 13,724,460 | 13,244,423 | ↗ 3.6% |
| 13 | ↗ 1 Xiamen | China | Asia | 12,045,700 | 11,410,000 | ↗ 5.6% |
| 14 | ↘ 1 Antwerp | Belgium | Northern Europe | 12,020,000 | 12,031,469 | ↘ 0.1% |
| 15 | — Tanjung Pelepas | Malaysia | Asia | 11,200,000 | 9,800,000 | ↗ 14.3% |
| 16 | ↗ 1 Los Angeles | United States | North America | 10,677,610 | 9,213,400 | ↗ 15.9% |
| 17 | ↘ 1 Kaohsiung | Taiwan | Asia | 9,864,448 | 9,621,662 | ↗ 2.5% |
| 18 | ↗ 1 Long Beach | United States | North America | 9,384,368 | 8,113,300 | ↗ 15.7% |
| 19 | ↗ 2 New York / New Jersey | United States | North America | 8,985,929 | 7,585,819 | ↗ 18.5% |
| 20 | ↘ 2 Hamburg | Germany | Northern Europe | 8,715,000 | 8,540,000 | ↗ 2.0% |
| 21 | ↗ 1 Laem Chabang* | Thailand | Asia | 8,335,384 | 7,597,900 | ↗ 9.7% |
| 22 | ↘ 2 Ho Chi Minh City | Vietnam | Asia | 7,956,133 | 7,854,091 | ↗ 1.3% |
| 23 | ↗ 1 Colombo | Sri Lanka | Asia | 7,250,000 | 6,854,762 | ↗ 5.8% |
| 24 | ↗ 1 Tanger Med | Morocco | Mediterranean | 7,173,870 | 5,771,200 | ↗ 24.3% |
| 25 | ↗ 5 Taicang | China | Asia | 7,037,900 | 5,212,000 | ↗ 35.0% |
| 26 | ↘ 3 Tanjung Priok* | Indonesia | Asia | 6,849,227 | 6,134,006 | ↗ 11.7% |
| 27 | ↘ 1 Mundra | India | Asia | 6,660,000 | 5,656,594 | ↗ 17.7% |
| 28 | ↗ 3 Hai Phong | Vietnam | Asia | 5,695,839 | 5,142,300 | ↗ 10.8% |
| 29 | ↗ 10 Jawaharlal Nehru | India | Asia | 5,630,000 | 4,470,000 | ↗ 26.0% |
| 30 | ↗ 8 Savannah | United States | North America | 5,613,163 | 4,682,249 | ↗ 19.9% |
| 31 | ↘ 2 Valencia | Spain | Mediterranean | 5,604,478 | 5,428,307 | ↗ 3.2% |
| 32 | ↗ 10 Cai Mep | Vietnam | Asia | 5,385,289 | 4,411,799 | ↗ 22.1% |
| 33 | ↘ 5 Piraeus | Greece | Mediterranean | 5,311,810 | 5,437,477 | ↘ 2.3% |
| 34 | ↘ 7 Yingkou | China | Asia | 5,207,000 | 5,650,000 | ↘ 7.8% |
| 35 | ↘ 1 Rizhao | China | Asia | 5,174,220 | 4,860,000 | ↗ 6.5% |
| 36 | ↘ 1 Lianyungang | China | Asia | 5,090,000 | 4,800,000 | ↗ 6.0% |
| 37 | ↘ 1 Bremen / Bremerhaven | Germany | Northern Europe | 5,018,900 | 4,767,000 | ↗ 5.3% |
| 38 | ↗ 3 Manila | Philippines | Asia | 4,976,014 | 4,442,921 | ↗ 12.0% |
| 39 | ↗ 1 Colón | Panama | Central & South America | 4,915,975 | 4,454,902 | ↗ 10.3% |
| 40 | ↘ 3 Jeddah | Saudi Arabia | Middle East | 4,882,342 | 4,737,313 | ↗ 3.1% |
| 41 | ↗ 4 Santos | Brazil | Central & South America | 4,831,972 | 4,232,046 | ↗ 14.2% |
| 42 | ↘ 9 Algeciras | Spain | Mediterranean | 4,799,497 | 5,107,873 | ↘ 6.0% |
| 43 | ↗ 3 Port Said | Egypt | Middle East | 4,764,583 | 4,009,672 | ↗ 18.8% |
| 44 | ↗ 3 Qinzhou | China | Asia | 4,630,000 | 3,950,000 | ↗ 17.2% |
| 45 | ↘ 2 Salalah | Oman | Middle East | 4,510,000 | 4,340,000 | ↗ 3.9% |
| 46 | ↘ 1 Tokyo | Japan | Asia | 4,325,956 | 4,259,755 | ↗ 1.6% |
| 47 | ↗ 1 Tanjung Perak (Surabaya)* | Indonesia | Asia | 3,901,215 | 3,602,233 | ↗ 8.3% |
| 48 | ↗ 5 Seattle / Tacoma | United States | North America | 3,736,206 | 3,320,379 | ↗ 12.5% |
| 49 | ↗ 2 Felixstowe** | United Kingdom | Northern Europe | 3,700,000 | 3,500,000 | ↗ 5.7% |
| 50 | — Vancouver | Canada | North America | 3,678,952 | 3,467,521 | ↗ 6.1% |

*2020 volumes include revised figures in government and port authority statistics **estimated figure

| Ranking | Port | Country | Region | 2021 annual throughput (teu) | 2020 annual throughput (teu) | Annual % change | |
|---------|------|-----------------|----------------------|------------------------------|------------------------------|-----------------|--------|
| 51 | ↓19 | Dalian | China | Asia | 3,672,000 | 5,110,000 | ↓28.1% |
| 52 | ↔2 | Yantai | China | Asia | 3,651,000 | 3,300,200 | ↔10.6% |
| 53 | ↔5 | Balboa* | Panama | Central & South America | 3,561,432 | 3,161,658 | ↔12.6% |
| 54 | ↔10 | Barcelona | Spain | Mediterranean | 3,531,762 | 2,958,040 | ↔19.4% |
| 55 | ↔13 | Virginia | United States | North America | 3,522,834 | 2,813,415 | ↔25.2% |
| 56 | ↔6 | Houston | United States | North America | 3,453,220 | 3,001,164 | ↔15.1% |
| 57 | ↔1 | Abu Dhabi | United Arab Emirates | Middle East | 3,440,000 | 3,220,000 | ↔6.8% |
| 58 | ↓6 | Dongguan | China | Asia | 3,400,000 | 3,420,000 | ↓0.6% |
| 59 | ↔6 | Manzanillo | Mexico | North America | 3,371,400 | 2,909,632 | ↔15.9% |
| 60 | ↓5 | Incheon | South Korea | Asia | 3,353,781 | 3,272,213 | ↔2.5% |
| 61 | ↓2 | Cartagena | Colombia | Central & South America | 3,343,810 | 3,127,579 | ↔6.9% |
| 62 | ↓13 | Fuzhou | China | Asia | 3,292,300 | 3,520,000 | ↓6.5% |
| 63 | ↔3 | Tangshan | China | Asia | 3,293,000 | 3,120,000 | ↔5.5% |
| 64 | ↔3 | Chittagong | Bangladesh | Asia | 3,214,548 | 2,839,977 | ↔13.2% |
| 65 | ↔8 | Gioia Tauro* | Italy | Mediterranean | 3,146,553 | 3,193,360 | ↓1.5% |
| 66 | ↔3 | London | United Kingdom | Northern Europe | 3,111,000 | 2,772,000 | ↔12.2% |
| 67 | ↔6 | Nanjing | China | Asia | 3,109,800 | 3,020,000 | ↔3.0% |
| 68 | ↔9 | Le Havre* | France | Northern Europe | 3,018,550 | 2,356,308 | ↔28.1% |
| 69 | ↔7 | Marsaxlokk | Malta | Mediterranean | 2,967,765 | 2,441,589 | ↔21.6% |
| 70 | ↓4 | Ambarli | Turkey | Mediterranean | 2,942,550 | 2,887,800 | ↔1.9% |
| 71 | ↔8 | Melbourne | Australia | Oceania | 2,909,288 | 2,995,248 | ↓2.9% |
| 72 | ↔2 | Yokohama | Japan | Asia | 2,861,197 | 2,661,622 | ↔7.5% |
| 73 | ↔2 | Kobe | Japan | Asia | 2,823,774 | 2,647,066 | ↔6.7% |
| 74 | ↔10 | King Abdullah | Saudi Arabia | Middle East | 2,813,920 | 2,153,963 | ↔30.6% |
| 75 | ↔3 | Sydney* | Australia | Oceania | 2,761,648 | 2,522,714 | ↔9.5% |
| 76 | ↔4 | Charleston | United States | North America | 2,751,442 | 2,309,995 | ↔19.1% |
| 77 | ↔3 | Nagoya | Japan | Asia | 2,725,597 | 2,471,146 | ↔10.3% |
| 78 | ↔5 | Genoa* | Italy | Mediterranean | 2,557,847 | 2,352,769 | ↔8.7% |
| 79 | ↔3 | Callao | Peru | Central & South America | 2,486,425 | 2,250,827 | ↔10.5% |
| 80 | ↔5 | Oakland | United States | North America | 2,448,243 | 2,461,262 | ↓0.5% |
| 81 | ↔9 | Durban | South Africa | Africa | 2,430,295 | 2,595,402 | ↓6.4% |
| 82 | ↔3 | Osaka | Japan | Asia | 2,425,638 | 2,352,250 | ↔3.1% |
| 83 | ↔6 | Jiaxing | China | Asia | 2,221,900 | 1,955,700 | ↔13.6% |
| 84 | ↔3 | Guayaquil | Ecuador | Central & South America | 2,163,151 | 1,980,600 | ↔9.2% |
| 85 | ↔2 | Yeosu Gwangyang | South Korea | Asia | 2,122,903 | 2,158,755 | ↓1.7% |
| 86 | ↔5 | Gdansk | Poland | Northern Europe | 2,117,829 | 1,924,000 | ↔10.1% |
| 87 | ↔3 | Mersin | Turkey | Mediterranean | 2,106,937 | 1,948,700 | ↔8.1% |
| 88 | NEW | Taipei | Taiwan | Asia | 2,091,132 | 1,618,131 | ↔29.2% |
| 89 | ↓4 | St Petersburg | Russia | Northern Europe | 2,042,358 | 2,099,649 | ↓2.7% |
| 90 | ↔4 | Zhuhai | China | Asia | 2,040,000 | 1,840,000 | ↔10.9% |
| 91 | ↔1 | Nantong | China | Asia | 2,027,000 | 1,911,000 | ↔6.1% |
| 92 | ↓4 | Haikou | China | Asia | 2,010,900 | 1,970,000 | ↔2.1% |
| 93 | NEW | Kingston | Jamaica | Central & South America | 2,004,302 | 1,631,011 | ↔22.9% |
| 94 | ↔1 | Taichung | Taiwan | Asia | 1,979,222 | 1,821,000 | ↔8.7% |
| 95 | ↔2 | Kocaeli | Turkey | Mediterranean | 1,967,946 | 1,800,642 | ↔9.3% |
| 96 | ↔2 | Lomé | Togo | Africa | 1,962,304 | 1,725,270 | ↔13.7% |
| 97 | ↓16 | Quanzhou | China | Asia | 1,954,300 | 2,260,000 | ↓13.5% |
| 98 | ↔2 | Southampton | United Kingdom | Northern Europe | 1,871,081 | 1,809,237 | ↔3.4% |
| 99 | NEW | San Antonio | Chile | Central & South America | 1,840,458 | 1,571,274 | ↔17.1% |
| 100 | — | Jinzhou | China | Asia | 1,830,000 | 1,643,000 | ↔11.4% |

*2020 volumes include revised figures in government and port authority statistics **estimated figure

— NO CHANGE

Throughput 2021: **47,030,300 teu**, **↗ 8.1%** (2020: 43,503,400 teu)

01 Shanghai (China)

Despite a successful 2021, lockdown-led disruptions cause a loss of handling volume in early 2022

THE 8% throughput growth to 47m teu for the world's busiest container port in 2021 was laudable. However, lockdown-led snarl-ups in 2022 have stolen the spotlight.

The draconian coronavirus-control rules implemented since mid-March 2022 resulted in a ripple effect, from clogged trucking services and occupied yard space to prolonged berth waiting time and skips of calls by carriers.

The disruptions caused Shanghai 1m teu in lost handling volume between April and May.

Bearing the brunt was its Waigaoqiao Port Area, which mainly accommodates smaller vessels on shorter voyage.

Terminals there experienced an infection outbreak among port workers in early April,

forcing hundreds of them into isolation.

Handling efficiency at those affected facilities was said to have dropped to 25%-50% of normal levels, while vessel waiting time has increased to three to four days.

No wonder Shanghai Mingdong Container Terminals, the main operator in Waigaoqiao, saw volume slump by more than two-thirds in April and May compared to the same period in 2021.

However, volume has been picking up after a city-wide lockdown was lifted at the beginning of June.

The overall daily port throughput in Shanghai reached 131,000 teu for the last 10 days of the month, which almost returned to the pre-lockdown levels, according

to data from China Ports and Harbours Association.

However, an anticipated strong rebound spurred by pent-up orders did not really emerge, although a decent recovery was seen in July, when container handlings at the port topped 4.3m teu, up 16% year on year, or 13% from the previous month.

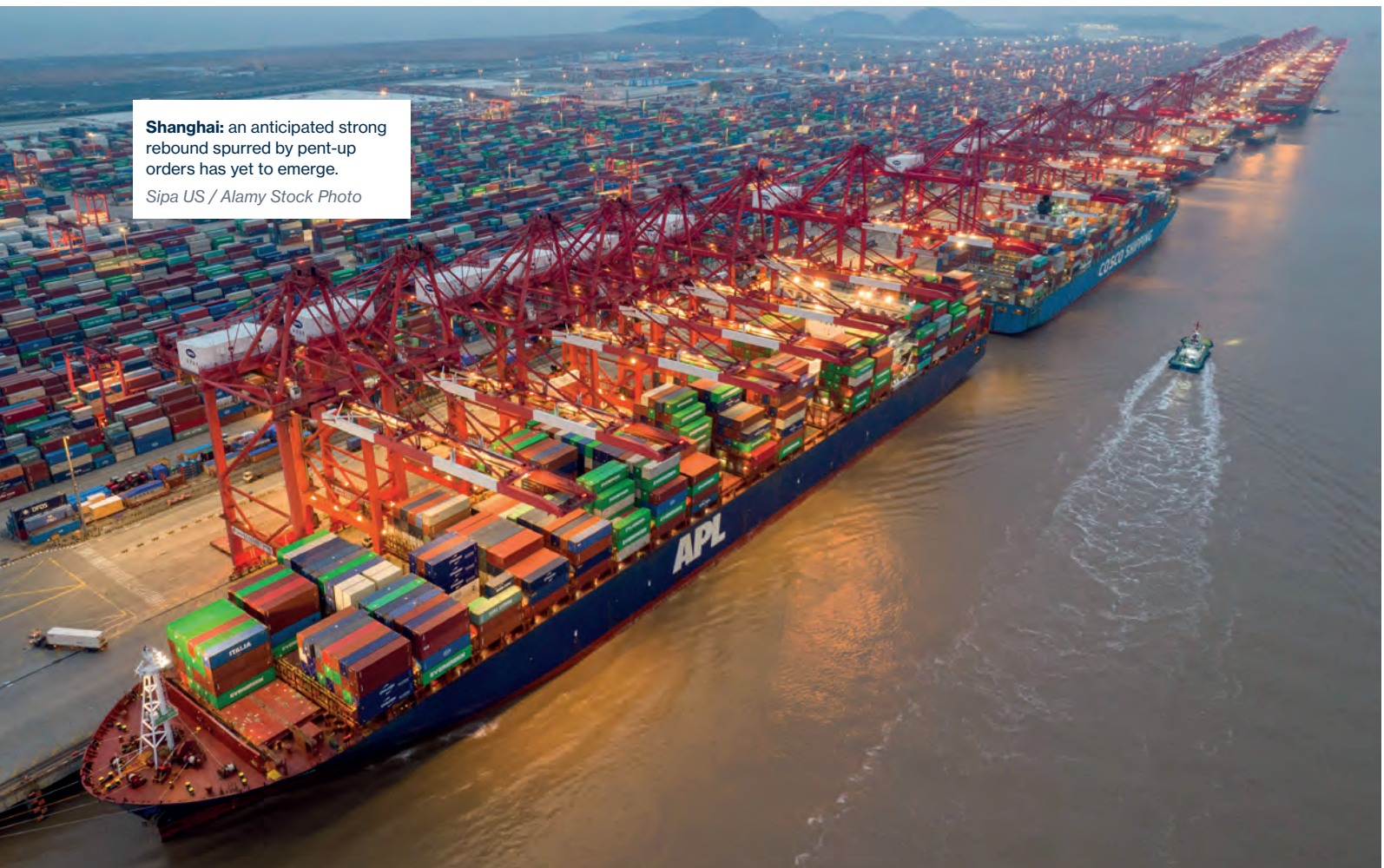
Lingering restrictions on road transport and a shift of cargo flows to other ports was said to offer part of the explanation.

Throughput at the nearby Ningbo port, for example, increased nearly 12% in April-May compared to the year-ago period.

Moreover, slowing cargo demand from the inflation-stricken large consumer nations, especially in the US and Europe, is also thought to be a contributory factor.

Shanghai: an anticipated strong rebound spurred by pent-up orders has yet to emerge.

Sipa US / Alamy Stock Photo





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“A lack of surge cargo [in Shanghai] can also add additional credibility to the notion that the market is not as strong as expected,” said container shipping consultancy Sea-Intelligence.

That said, the Yangtze River Delta Region, where the shipping hub is located, remains the most developed economic powerhouse in China, while the port still boasts facilities and a workforce deemed to be one of the best and most efficient across the globe.

In 2021, Phase Four of Yangshan Deepwater Port, touted as the world’s largest fully-automated container terminal, recorded a 35.7% year-on-year growth in handlings to 5.7m teu — just a little shy of its designed capacity of 6.3m teu.

Before the lockdown, initiatives by Shanghai International Port Group to set up an empty container-dispatching centre in Yangshan were gathering pace, with investment agreements signed with several major carriers.

And a Yuan20bn (\$3bn) new terminal specialising in feeder and shortsea services — an extension to the existing Yangshan facilities — is expected to start construction within 2022 and further enhance the port’s transport systems upon completion.

The port had proved its resilience in the past, particularly during the earlier days of the pandemic. Volume dropped nearly 7% in the first six months of 2020, yet it was soon reversed by a strong rebound in the second half.

At the time, new cases of the virus were surging overseas, while China managed to bring it under control quickly and restore production with its zero-Covid policy. Export growth soared as orders returned from foreign factories hobbled by closures and logistics chaos.

Now the same Chinese policy seems to have become less efficient to curb the spread of the highly transmissible Omicron variant. Reinstatement of normal

activities takes longer and risks of a relapse are increasing.

That compares with most countries in the rest of the world that have chosen to co-exist with coronavirus and are seeing reduced disruptions to lives and businesses.

If China sticks to its strict Covid restrictions, it will likely make the virus remain as a major threat to operations at Shanghai, as well as many other ports in the country.

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)

— NO CHANGE

Throughput 2021: **37,470,000 teu**, **▲1.6%** (2020: 36,870,900 teu)

02 Singapore (Singapore)

Island nation's port remains open and connected to the world, despite the ongoing Covid pandemic

SINGAPORE remains the world’s busiest container transshipment port, handling a record high of 37.5m teu of container throughput in 2021, up 1.6% year on year.

In total, Singapore handled 599m tonnes of cargo in 2021, with vessel arrivals reaching a total of 2.8bn gt.

The port’s biggest operator, PSA Singapore, recorded a throughput of 37.2m teu during 2021 — also a record high, and an increase of 1.6% from 2020.

“The world in 2021 continued on its roller-coaster ride, with

widespread supply chain disruptions and congestion, coupled with sustained recovery in global trade and demand,” said PSA Group chief executive Tan Chong Meng.

“Despite the multiple hurdles posed by the global pandemic, PSA contributed to keeping supply chains safe and open for our customers, partners and stakeholders worldwide.

“Looking ahead in 2022, supply chain issues are expected to remain, but there are also opportunities in the crisis — our continued

relevance will depend on our ability to seize them.

“PSA will continue to seek win-win partnerships and innovate beyond port operations to provide more efficient and resilient cargo solutions that benefit the greater supply chain ecosystem and catalyse the shift towards sustainable trade,” Mr Tan added.

In December 2021, the first two berths at PSA Tuas Port Phase One started operating.

Tuas Port, an ambitious mega port project located at Singapore’s western seaboard,



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Singapore: the port hit a record high in its throughput figures in 2021, amid challenging global economic conditions.

PSA Singapore

is being developed in four phases. When fully completed in the 2040s, it will be able to handle up to 65m teu annually.

Two key facilities at Tuas Port have also been completed: the Tuas Terminal Gateway and Tuas Nexus.

The TTG is an intelligent flow-through gate that leverages technology to enhance port user experience and reduce vehicular idling time, enabling a seamless drive-through experience.

Gate operations are monitored through a central and integrated control centre housed within the TTG.

Tuas Nexus includes the administration building and maintenance base. The administration building is PSA Singapore's first super low-energy building, designed to be smart and green. It is expected to use 58% less energy annually compared to other similar-sized buildings.

Deliveries and commissioning of equipment for Tuas Port, such as the double-trolley quay cranes, automated rail-mounted gantries and the automated guided vehicles, continue to take place.

In 2021, PSA Singapore pushed through various

initiatives in the digitalisation sector. In a concerted effort to drive supply chain digitalisation, PSA Singapore and the Container Depot and Logistics Association (Singapore) launched 'SmartBooking' — an integrated, one-stop booking platform for container depots, terminals, hauliers and logistics facilities across Singapore — in January 2021.

Through the single end-to-end platform, powered by artificial intelligence, SmartBooking users gain higher visibility of the entire logistics flow, obtaining easy access to information such as vessel schedules, container movement events and planned activities.

It also introduced iBOX (intelligent Box Operation eXchange), a next-generation depot management solution that digitally connects the port with container depots across Singapore.

iBOX is further integrated with SmartBooking for seamless data exchange, enabling better truck visibility for enhanced efficiency between logistics facilities and container depots, two major nodes in container transportation.

In response to the current

disruptions in global supply chains, PSA Singapore has been deploying additional resources and ramping up its capabilities to support the increased activity at the port.

Above and beyond port activities, the PSA Cargo Solutions Southeast Asia team has launched a series of value-added services to support cargo owners, which includes priority discharge, top stowage, express delivery, flexi-alerts and fast connection management system for containers moving via Singapore.

Finally, in support of industry-wide efforts to decarbonise, PSA and container shipping company Ocean Network Express signed a memorandum of understanding in July 2021 to reduce greenhouse gas emissions, working towards a more responsible and greener maritime and shipping industry of the future, and pointing the way towards embracing sustainable practices across their businesses.

The collaboration includes areas relating to container flow enhancement and terminal services for ONE's operations, which will lead to a reduction of CO2 emissions.

In November 2021, PSA and ONE launched a barge service from PSA Singapore to PSA Jurong Island Terminal.

Transportation of container-on-barge, or barge shipping, is a more environmentally friendly mode of cargo transportation compared to truck operations.

This joint endeavour could reduce up to 30% of greenhouse gases per one teu or container.

This barge service will be used to transport empty containers to PSA Jurong Island Terminal for ONE's identified customers located on Jurong Island.

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

Website: www.mpa.gov.sg/home

Email: qsm@mpa.gov.sg

Terminals (Operators):

Tanjong Pagar Terminal (PSA Singapore)

Keppel Terminal (PSA Singapore)

Brani Terminal (PSA Singapore)

Pasir Panjang Terminal (PSA Singapore)

Jurong (Jurong Port)

— NO CHANGE

Throughput 2021: **31,070,000 teu**, **↑ 8.2%** (2020: 28,720,000 teu)

03 Ningbo-Zhoushan (China)

Growth in box volume brings the port into the elite club of just a few competent players with an annual throughput of more than 30m teu

HIT hard by the coronavirus pandemic, Ningbo-Zhoushan port has shown strong resilience and proved it can stand the test.

The growth in box volume brings the port into the elite club of only a few competent players that have an annual throughput of more than 30m teu.

Some 27 new routes were developed in 2021 by the shipping lines operating from Ningbo-Zhoushan.

Volume handled by the port's rail-sea transport jumped 19.8% to 12m teu over the same period.

This was partly driven by

Ningbo's efforts to develop a special rail line connecting it with Yiwu, which is well known for its commodity trade and the co-operation with local customs to streamline clearance procedures.

The service has covered 16 provinces and 61 cities in the nation as of 2021.

The port's investment in infrastructure started to pay off, despite the stringent virus-control measures in place.

The smart port project in Meishan Port Area — jointly developed by Ningbo-Zhoushan Port, China Mobile, Zhenhua

Heavy Industries Co and Huawei — has been available since December 2021, with the opening of four new berths and operations starting to be taken over by remote-controlled cranes and tractors.

In another major port area, the construction of Chuanshan — the Yuan43bn (\$5bn) number one container terminal — was completed in April 2021, pushing the number of box berths to 11, with a combined handling capacity of 10m teu.

Under closer inspection, while the full-year result is impressive, the port actually experienced two



Ningbo-Zhoushan: investment in infrastructure has started to pay off, despite the stringent virus control measures.

extremely different conditions in the first and the second half of 2021, respectively.

Situated at China's eastern economic powerhouse in the Yangtze River Delta region, the port has pressed home its geographical and economic advantages. Box volume surged by 21.3% to 16m teu in the first six months of 2021.

State-owned China Merchants Port Group's acquisition of the port's 3.6bn shares in July 2021 further fuelled outside expectations.

However, the robust progress was held back by a typhoon and the abrupt outbreak of coronavirus, starting from the second half of the year.

All the efforts made by the port and gains from CM Port's acquisition were not enough to offset the losses spurred by these factors, as the full-year growth rate slowed to 8.2%.

In July 2021, operations were

phased out at an earlier stage at the major terminals in Ningbo, closer to the landfall point, resulting in disruptions to vessel schedules.

Operations were halted again in August 2021 for two weeks after a dockworker tested positive for coronavirus, adding strain to an already stretched logistics chain.

Container shipping carriers rerouted ships and bypassed the blocked terminal in Ningbo to avoid further schedule delays.

Meanwhile, congestion at Ningbo port escalated, due to the closure of the terminal.

The disruption to the supply chain still lingered after it reopened in late August 2021.

While the port tried to recover from the suspension in the remainder of 2021, the resurgence of Covid outbreaks continued to dampen its hopes again in January 2022.

Challenges included cargo

traffic that was clogged by the lockdown and a shortage of container truck drivers in the city.

The activities of more than 20,000 drivers serving the port were restricted during the new wave of Covid outbreaks in 2022.

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

— NO CHANGE

Throughput 2021: **28,767,600 teu**, **↗ 8.4%** (2020: 26,550,000 teu)

04 Shenzhen (China)

Covid-led uncertainties seem not to have altered the port's expansionary path, as envisaged by local authorities

THE growth outlook of the world's fourth-largest container port has been determined by the whims of coronavirus in recent years.

A throughput plunge after the initial shockwave of the pandemic was followed by a V-shaped recovery in the second half of 2020, with China quickly putting domestic infections under control and seeing a resulting rebound in exports.

The recovery was then interrupted by the month-long shutdown of Hutchison's Yantian International Container Terminal, a major handling facility sitting at Shenzhen's eastern side.

At the time, the resulting congestion and delays — triggered by several infected dockworkers in May 2021 — rippled through the global supply chains, which were already stretched by the pandemic-led congestion and bottlenecks overseas.

Yet the port, which dominates the South China market, again proved its resilience and recorded an annual throughput increase of 8.4% for the whole of 2021 — the highest growth seen since 2010.

Prospects for 2022 remain unclear.

A severe outbreak of Covid triggered by the highly

transmissible Omicron variant in the city in the first quarter of the year took a heavy toll on landside logistics and terminal operations.

Shenzhen was under a city-wide lockdown for weeks, as Maersk warned that the efficiency of trucking services between the Chinese tech hub and nearby cities could be reduced by 30% because of stricter road control and frequent nucleic acid tests for drivers.

Throughput at the port in the first three months of 2022 dropped by more than 10% compared to the same period of last year.

The steep falls were seen in both key components of the port — Hutchison's YICT and the west Shenzhen sector, dominated by China Merchants Port (CMPort) — with both operators reporting similar trends.

Data from China's ministry of transport shows the 10% contraction turned into a 4.6% growth for the first half of 2022, indicating the volume picked up quickly in the following months.

The future trends can be subject to various factors, including demand changes from the large consumer countries.

However, the Covid situation in China will continue to play a key role as Beijing insists on its zero-Covid policy.

Yet the uncertainties do not seem to have altered the port's expansionary path, as envisaged by local authorities.

In a government scheme released in May 2022, the Shenzhen Transport Bureau set a target for the city's port to reach 33m teu in throughput by 2025.

Port expansion projects are

also in the pipeline. On the eastern side the city, construction of a new terminal near YICT was kicked off in December 2021. The Yuan14.5bn (\$2.2bn) project, which includes three automated ultra large containership berths and other related facilities, is expected to add 3m teu of annual capacity once completed.

Local government said it will be developed into "the best smart and green terminal in the world", with the application of a string of cutting-edge technologies, including 5G, China's BeiDou Navigation Satellite System, blockchain and artificial intelligence.

There are also plans to link the terminal with a railway in the longer term.

Meanwhile, CMPort is preparing to build the Dachan Bay Phase Two, a smart box terminal with similar features and capacity, having acquired 522,000 sq m of land and 1,700 m of quay-line on the other side of Shenzhen in late 2021.

The company told investors

at a meeting in June 2022 that it will draw on the experience from its smart port project in Mawan and "forge the facilities into the most advanced automated container terminal in the industry".

The Mawan terminal, which began operations in June 2021, has seen its handling levels top 1m teu and profits reach Yuan100m (\$15m) over the past year, according to CMPort.

It is equipped with two ULCS berths, which were retrofitted from spaces originally used to handle dry bulkers.

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

Website: jtys.sz.gov.cn

Email: jtzx12328@sztb.gov.cn

Terminals (Operators):

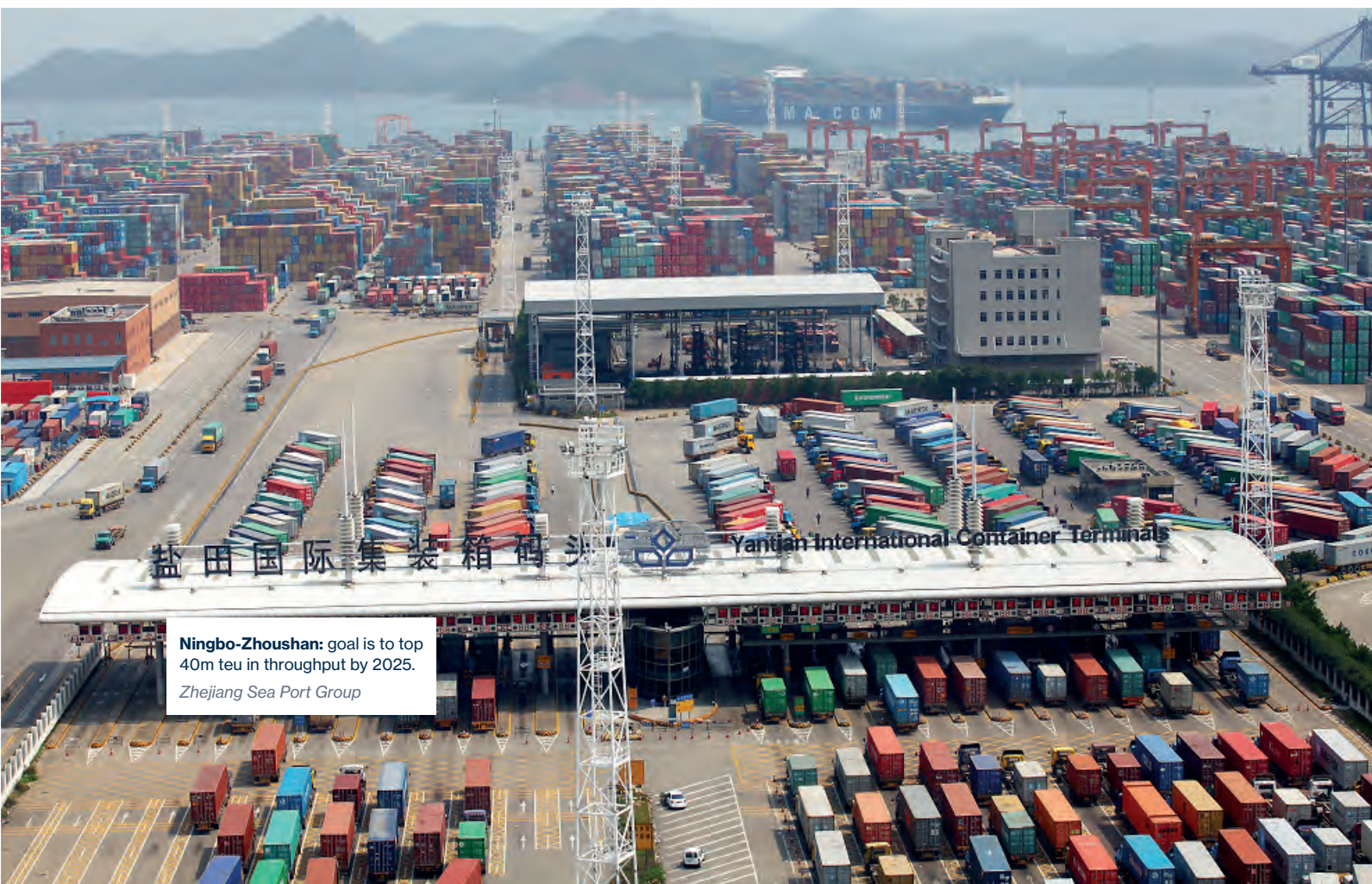
NingShekou Container Terminals (China Merchants Port Group)

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)



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



— NO CHANGE

Throughput 2021: **24,180,000 teu**, **↗ 2.9%** (2020: 23,505,300 teu)

05 Guangzhou (China)

New projects are set to further boost the port's capacity, but short-term prospects are challenged by a slow economy and Covid restrictions

IN Guangzhou, a sprawling trading hub northwest of Hong Kong on the Pearl River, efforts are still under way to bring one of the world's largest container ports closer to the sea.

Most of the box-handling capacity over the past 18 years has been moved from the old downtown port area of Huangpu to the newer site at Nansha, which is about 70 km away in the south and looks out over the estuary.

Last year, the combined throughput at the three in-service Nansha terminals reached 17.6m teu, making up more than 70% of the port's total, according to Guangzhou Port Group, the main operator.

The \$1bn Phase Four, including an automated terminal consisting of 12 barge berths and four boxship berths, saw the building of its main structure completed in April.

When the operation starts, it will increase Nansha's total

capacity by 4.9m teu to 24m teu. The new facility, located on the southern tip of Longxue Island, will also be home to what is dubbed as China's largest refrigerator — a large cold chain project as part of the Nansha International Logistics Centre.

The aim is also to develop the burgeoning port area into the largest distribution hub for frozen food and imported fruits in South China, said the local government in a statement in June.

Construction of a fifth terminal, to be equipped with three ultra large containership berths and 1,380 m of quay-line, is also in the pipeline.

The project has been included into Beijing's latest social and economic development blueprint, the 14th Five-Year Plan, between 2021-2025.

However, the slowing economy in China and overseas could pose challenges to the prospects of these expensive new facilities — at least in the short term.

In August 2021, local government set a target for the city's port to reach 25.5m teu in throughput in 2023, as part of the scheme to build Guangzhou into an international shipping hub.

The goal looks challenging now. For the first five months of 2022, the volume in Guangzhou dropped 1.4% year on year to 955,000 teu, according to the latest available data from the transport ministry.

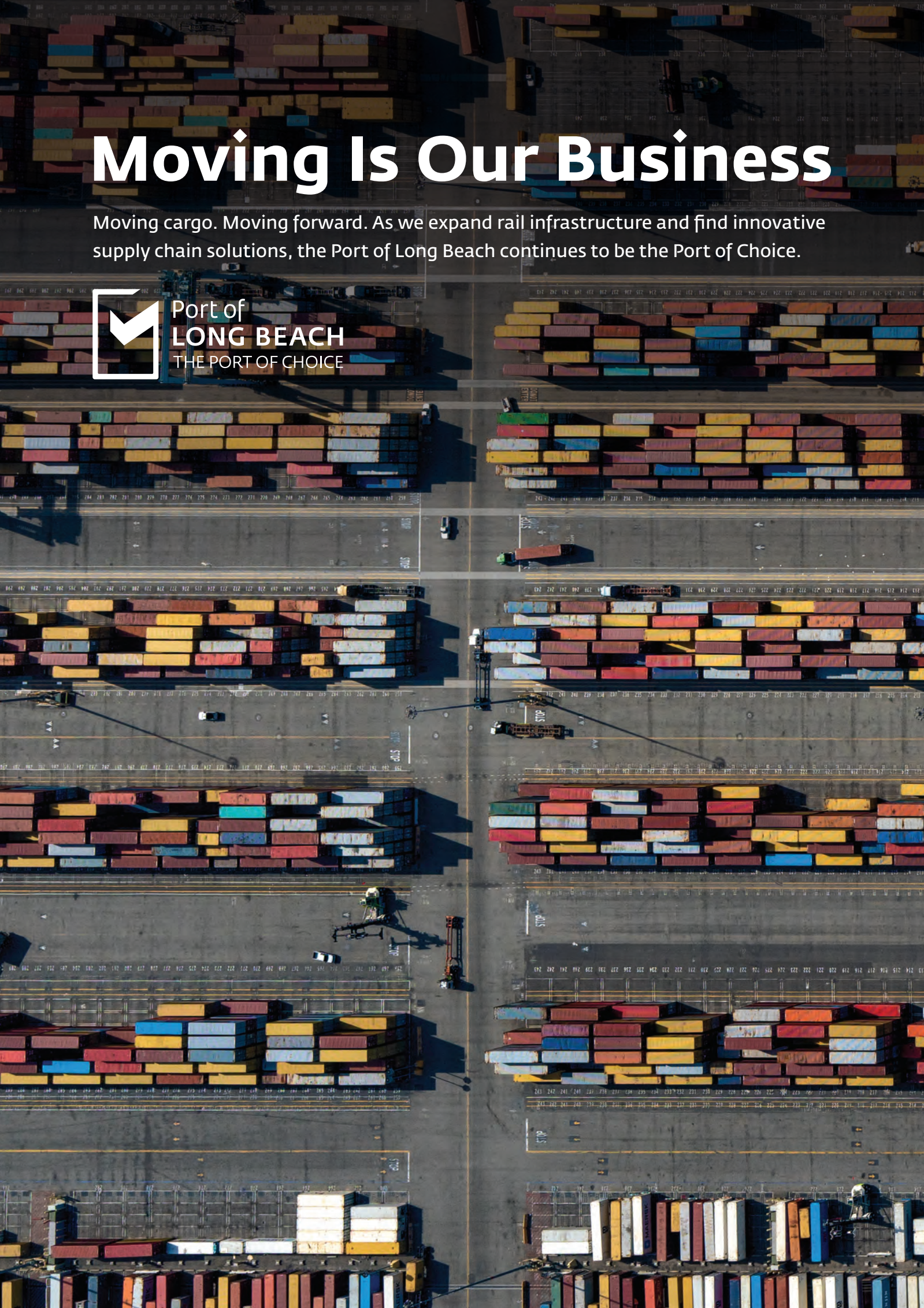
The Covid infection represents an obvious downside risk.

There have been no reports yet about terminal closures in Guangzhou due to infected port workers — incidents that have been experienced by other large Chinese port cities, such as Shenzhen and Ningbo.

However, the virus-control measures, including strict quarantine requirements and frequent nucleic acid tests, have weighed on factory production and logistics services, eventually impacting cargo volumes.

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A resurgence of local infections in April 2022 led to mass testing in the city and reduced social activities.

Local authorities also tightened the control over truck drivers coming from other provinces, some of whom had tested positive.

Drivers were asked to report their personal information and itinerary 24 hours before they entered the city's border.

Those from what is deemed as the high-risk Covid regions were also subject to the so-called closed-loop management system, under which they were not allowed to travel elsewhere

other than specific destinations (usually ports, factories and warehouses) during the entire journey.

Some efforts have been taken to alleviate the impact of the Covid restrictions on trucking services. To speed up the gate-ins and gate-outs of container truck drivers, Nansha, for example, launched a digital system that can simultaneously identify the faces of drivers, check their body temperature, health code and NAT results, according to local media reports.

The throughput situation seems to have stabilised more recently. GPG said its handling

volume grew 4% and 6%, respectively, in June and July.

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):

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 Oceangate Container Terminal (Guangzhou Port Group, Cosco Pacific and APM Terminals)

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

— NO CHANGE

Throughput 2021: **23,710,000 teu**, **↑ 7.7%** (2020: 22,010,000 teu)

06 Qingdao (China)

Growth at northern China's busiest port comes amid the country's rebound from low levels of activity

THE port of Qingdao seems to have adapted itself well to the challenges presented by coronavirus in terms of throughput growth.

Box volume increased by 7.7% year on year to 23.7m teu during 2021.

The growth at northern China's busiest port comes as the country rebounded from low levels of activity.

The total value of imports and exports of cargo for 2021 increased by 21.4% compared to the same period in the previous year.

The port appeared to be better equipped to deal with coronavirus fallout in 2021, drawing on the experience of dealing with the disease in 2020.

Port workers were under a so-called closed-loop management system, which required drivers to disclose their full itinerary and delivery destination.

Under consideration of the pandemic's impact, all the reductions in relevant port fees were carried over from 2020 to 2021, which contributed to the growth of box volume, the port said in an annual report.

In dealing with the shortage of available slots, the port actively co-ordinated with line operators to provide extra sailings from Qingdao.

It added 24 new routes in 2021, among which 19 were foreign trade routes connecting it with Southeast Asia, South America, the Middle East and Europe.

The three new shipping services include a Southeast Asian service provided by Evergreen Marine, opening up a fast shipping logistics channel between the Qingdao and Malaysia.

Wan Hai also launched a service from Qingdao to South America, which is the first Central and South America service by the line

operator from Qingdao port. It also established an 'end-to-end' integrated logistics service system in the hinterland market along the Yellow River.

Meanwhile, container volume from sea-rail intermodal services linking Qingdao with inland cities has maintained first place among all Chinese coastal ports for seven consecutive years.

Further, previous investment in infrastructure and the construction of a smart port started to pay off in 2021, helping to pull Qingdao through the challenges.

For instance, it adopted high-tech robots to disinfect the port, preventing the spread of coronavirus within the area.

The first phase of its 'skyrail' project was initiated in 2021. The advanced facility, which can move boxes above ground onto autonomous trucks, frees up a lot of space in the busy port.



Qingdao: established an 'end-to-end' integrated logistics service system in the hinterland market along the Yellow River.

At its full extent, the skyrail project will stretch 9.5 km across the port and handle around 1.5m boxes per year.

While it appears everything was in order, the Container Port Performance Index — which measures port efficiency and was developed by the World Bank — indicates potential risks at the port.

According to the index, Qingdao, which ranked third among global

ports in 2020, dropped to 42nd position in 2021.

There was also a rejig at the board of directors of Qingdao Port International Co. Su Jianguang succeeded Jia Funing as the new chairman at the port. The 53-year-old received a part-time masters degree in engineering from Ocean University of China.

Li Wucheng, 57, was appointed as vice-chairman in the board reshuffle.

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)

— NO CHANGE

Throughput 2021: **22,706,130 teu**, **↑ 4%** (2020: 21,824,000 teu)

07 Busan (South Korea)

China's latest cabotage relaxation scheme poses a challenge to the South Korean port

AS the Chinese juggernaut rises again, Busan port is in trouble.

While the major Northeast Asian transshipment hub port's 4% throughput rise to 22.7m teu might, at first glance, look average, when it is compared with its closest competitors in the leading group of the Top 100 list, its 2021 performance appears decidedly lacklustre.

Combine this with new market dynamics — such as a trial relaxation of China's

cabotage rules on some northern routes, endemic congestion on the transpacific trades and the current structure of stronger liner alliances — and Busan's position starts to look a little more shaky.

The next highest ranked port Qingdao not only overtook Busan the previous year, but has built on this lead, extending well into the high 23m teu range in 2021, with an 8% rise in throughput.

Meanwhile, the next port down in the rankings, Tianjin, is hard on Busan's heels, with a 10% rise in 2021, bringing it into the 20m teu league.

With similar percentage increases, it is well within range of overtaking Busan very soon.

Both of these ports are part of China's latest relaxed cabotage scheme.

Busan port's figures show its top volumes are with Qingdao, followed by Shanghai and

Tianjin. These grew by 9%, 8% and 0.8%, respectively, from 2020 to 2021.

Conversely, container trade with key northern China port Dalian — the third of the ports in the relaxed cabotage scheme with Shanghai — and the main US transpacific trade ports of Los Angeles and Long Beach all declined by 2.4%, 0.9% and 13.2%, respectively.

According to the Yellow Sea Liner Shipping Council, South Korea-China container trade rose 4.5% to 3.4m teu in 2021.

Overall figures show volumes to China rose 2.8%, driven by mainline services, which rose 3.3% as feeder volumes shrank 2.6%.

In the opposite direction, Chinese exports to South Korea rose 5.5%, with mainline volumes dominating with a 9.2% share at the expense of feeder services, which plunged by one-third.

This trend has continued into the beginning of 2022. First-quarter volumes not only fell by almost 2% as the traditional holiday period and Shanghai's

lockdown slowed traffic, but also reinforced the trend of the decline in feeder services outpacing that of mainline services, with a 12.4% decline in the former compared to 1% for the latter.

With Busan making up more than three-quarters of all volumes and 96% of transshipment volumes in South Korea, it can be assumed that these figures are highly reflective of its performance as well.

Apart from market developments, Busan continues to be disadvantaged by underlying structural issues, which are now being exacerbated by the changes happening around it.

According to a Korean Institute of Navigation and Port Research study, Busan's legacy North Port terminals — which are mainly used to handle transshipment boxes from China and Japan — are hampering the port's growth as a transshipment hub.

This is due to the need for inter-terminal transfers to the

mainline services, which mainly call at the more recently built New Port terminals.

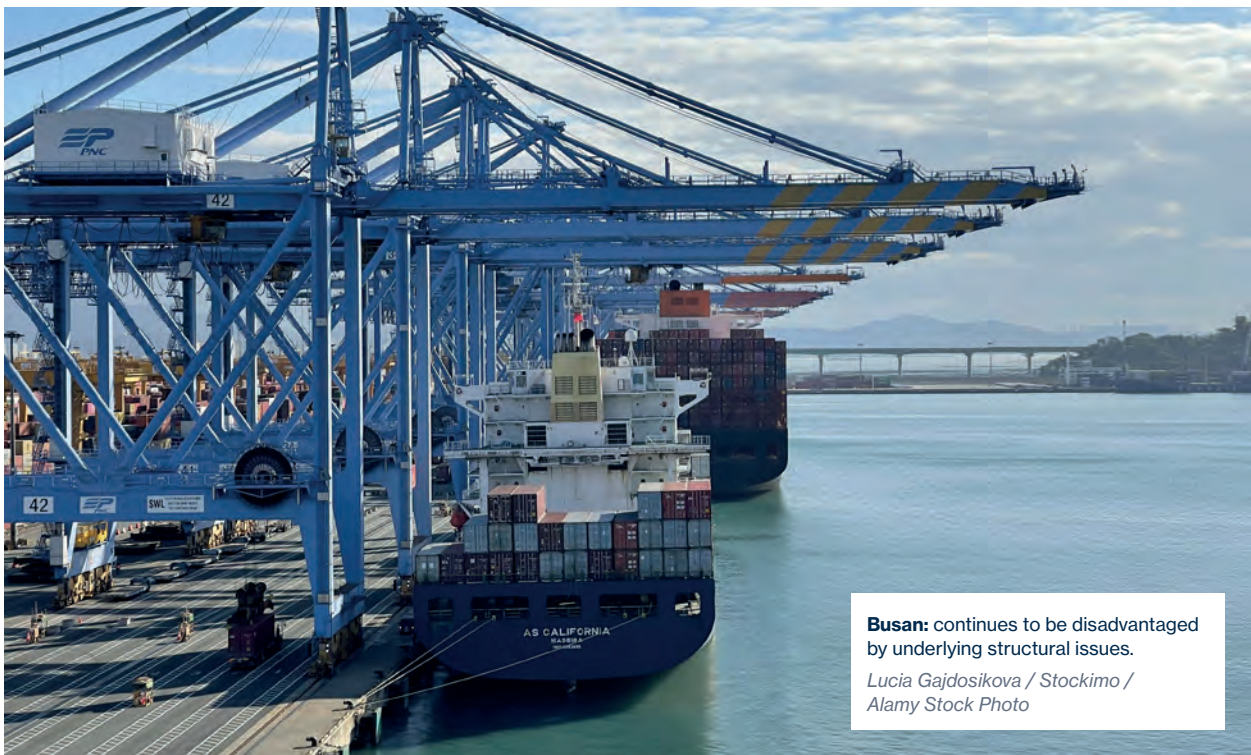
About 35% of Busan's transshipment volumes need inter-terminal transfers, adding to inconvenience and cost, according to the study.

The proportion of transshipment traffic is shifting in favour of the New Port, with the latter's share rising to 78.6% in 2021 from 77.8% in 2020 and showing a steady rise from 73.6% as recently as 2017.

However, this still disadvantages it against other regional transshipment rivals such as Hong Kong, which recently consolidated all but one of its terminal operators under an alliance.

The lack of global carriers participating as terminal operators is another glaring drawback, as the latest terminal tender went to yet another South Korean party.

As the liner alliances emerge stronger than ever post-Covid, the threat of them moving transshipment volumes to



Busan: continues to be disadvantaged by underlying structural issues.

Lucia Gajdosikova / Stockimo / Alamy Stock Photo

their dedicated terminals in Shanghai, Ningbo and the Bohai Rim ports of Qingdao, Tianjin and Dalian is rising.

However, Busan still holds the location trump card for now, with more than 65% of transshipment traffic between the US, China and Japan still going through its facilities.

Yet it recognises the challenges ahead, with prolonged port congestion and supply chain disruption issues in the US and Europe due to the pandemic, and an accompanying high congestion level in Busan port.

In addition, there is an increase in higher-speed, higher-volume shipments, with the increase in e-commerce-related volumes also arising post-Covid. Busan port saw a 30% rise in express shipping volume during the period.

Nonetheless, the port is trying to do what it can, with the aim of achieving a 3.5% rise in throughput to 23.5m teu for 2022.

Busan Port Authority has allocated a budget of Won3.1trn (\$2.4m) for infrastructure construction and Won1.1bn for redevelopment of the North Port.

During 2021, a deal was signed to create an express shipping area with accelerated customs clearance for e-commerce items, with the aim of becoming the e-commerce logistics hub of Northeast Asia.

A consortium led by Dongwon brought the port's phase 2-5 expansion into operation sooner than expected in early 2022, bringing in three berths and 2.2m teu in additional capacity to help handle extra loaders added to meet South Korean export demand.

Dongwon Pusan Container Terminal will ultimately operate a six-berth terminal, integrating phases 2-5 and 2-6 and a feeder terminal as Pier 6, under a 30-year concession.

South Korea's first terminal with remote-controlled quay cranes can handle megaboxships and is expected to take calls from vessels on the Far East-Persian Gulf and transpacific trade lanes.

Carriers on the South Korea-Japan feeder route, such as Japanese container line ONE and domestic operator Ehime Ocean Line and South Korean feeder Dongjin Shipping, will also start using Pier 6 as

Dongwon brings customers over from its previous operations.

ONE alone brought in more than 3m teu in gateway and transshipment volumes to Busan port in 2021.

Busan port's position in the port rankings continues to be under threat from its Chinese competitors as it has been for several years now.

However, with its geographical advantage and strong transshipment network, the Northeast Asian hub's position as the second-biggest transshipment port will likely remain steadfast for some time to come.

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

Website: www.busanpa.com

Email: juchoi@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)

New Pier 6 (Dongwon Pusan Container Terminal)

— NO CHANGE

Throughput 2021: **20,269,400 teu**, **↑ 10.4%** (2020: 18,353,100 teu)

08 Tianjin (China)

Efforts continue at the northern Chinese gateway port to increase connectivity and improve efficiency

CONTAINER shipping throughput at Tianjin broke the 20m teu threshold in 2021.

The double-digit growth achieved by the major gateway port near Beijing in northern China was impressive and the best score among the major ports in the country.

Efforts to increase connectivity and improve efficiency continued.

Tianjin added 10 services with a focus on routes to the emerging economies.

Handling volume to and from Africa and Southeast Asia grew 10% and 7% year on year,

respectively, in 2021, according to Tianjin Port Group, the main operator.

Meanwhile, on domestic trade, the enhanced daily feeder services in the Bohai Rim — using Tianjin as the largest transshipment hub in the region — have developed into an



CHANGEMAKER IN PORT AND SHIPPING



SAIF Powertec Limited (SPL) currently manages 60% of the container throughput of Chattogram Port which was ranked 67th amongst all the Container Ports globally by the Lloyd's List -2021.

SAIF Powertec and SAIF United Shipping recently signed a strategic partnership contract with Abu Dhabi Port Group (Safeen Feeders) for a period of 15 years in order to boost trade and facilitate the efficient movement of dry-bulk cargo between the U.A.E and Bangladesh as well as across the region.

SAIF Powertec is also working for setup of a nation-wide logistic network to boost-up the supply chain management across the nation.

Tarafder Md. Ruhul Amin
Managing Director,
SAIF Powertec Limited

While the whole world had struggled to overcome the pandemic, we worked restlessly to ensure uninterrupted port operation which eventually contributed to the economic growth of the country. Our vision is to become one of the top-most logistic companies in the port and shipping arena.



Tarafder Md. Ruhul Saif
Director
SAIF Powertec Limited



Chattogram Port



Dhaka Rail ICD



Pangaon ICT



SAIF MARITIME LLC
A Global Network With World Class Shipping Lines & Mainline Operator



BANGLADESH :

Dhaka Office:
Khawaja Tower
95, Bir Uttam AK Khandakar Road
Mohakhali C/A, Dhaka 1212, Bangladesh.

Chattogram Office:
Makkah Madinah Trade Centre
(17th Floor) 78, Agrabad C/A
Chattogram, Bangladesh.

Khulna Office:
Jetty 3 and 4 nos
Mongla Port, Mongla
Bagarhat-9351, Bangladesh.

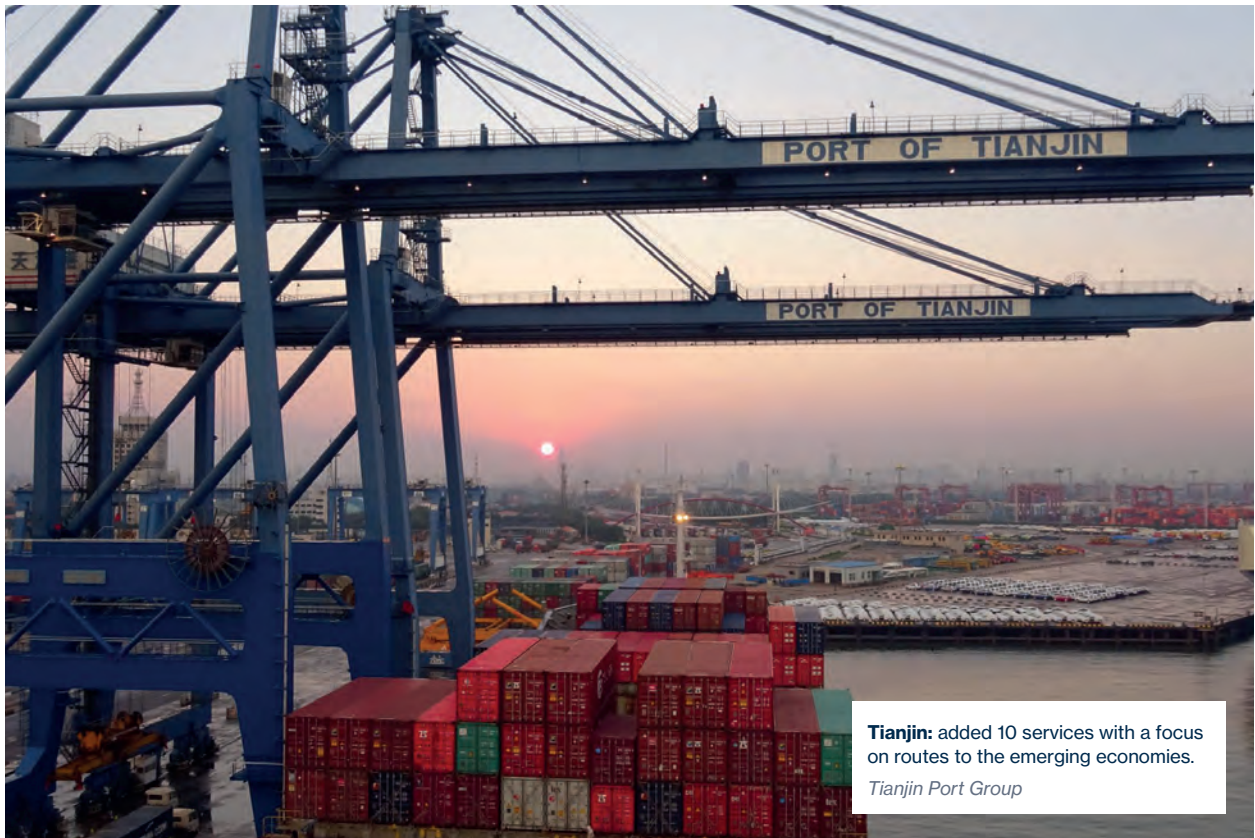
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Singapore 128424



Tianjin: added 10 services with a focus on routes to the emerging economies.

Tianjin Port Group

important growth engine, seeing volume jump more than 30% to 1.3m teu.

The sprawling networks also gave rise to the so-called “liang gang yi hang” business model, which enables an exclusive service between Tianjin and another major Chinese port.

Under the model, 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.

In July 2021, Tianjin and Guangzhou launched an enhanced version of the service named 'Ocean Express — Fast', which could further accelerate the shipping process for shippers.

A single-trip time between the port has been reduced by 50% to four days, while logistics efficiency has increased by 30%, according to TPG.

Additional growth momentum seems also to have been derived from a developed railway system connecting the port to the

European continent via Mongolia and Russia. Tianjin’s sea-rail transport volume topped 1m teu in 2021, up 25% from 2020.

On the technology front, an automated zero-carbon terminal, powered by wind energy and photoelectricity, was put on stream in October 2021.

The facility, operated by Tianjin Port Second Container Terminal Co, is equipped with three ultra large containership berths and an annual design capacity of 2.5m teu.

Construction was also completed in July 2021 on the project to convert four berths at Tianjin Port Container Terminal into a fully automated facility, backed by cutting-edge technologies such as artificial intelligence and 5G connections.

One of the berths already in service is capable of fully unmanned operations, which can reduce energy consumption by 20% per container, increase handling efficiency by 20% and cut operational costs

by 10% when compared to a conventional box berth, according to the terminal operator.

Despite the progress, the port is not immune to Covid-led disruptions.

Amid a resurgence of infections in China since 2021, which also hit Tianjin, throughput growth at the port was reduced to just 2.2% for the first six months of 2022, according to the latest available statistics from the transport ministry.

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):

Tianjin Port Second Container Terminal Co (Tianjin Port Group)

Tianjin Port Container Terminal (Cosco Shipping, Tianjin Port Group and China Merchants)

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

Tianjin Port Euroasia International Container Terminal (Tianjin Port Group, APM Terminals Tianjin)

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

— NO CHANGE

Throughput 2021: **17,798,000 teu**, **▼ 0.9%** (2020: 17,953,000 teu)

09 Hong Kong (China)

Island nation port's position as the most efficient transshipment facility in South China and gateway to the mainland continues to come under pressure

HONG Kong port continued its gradual slide out of the big league, with another decline in throughput for 2021 to 17.8m teu, edging it closer to being bumped out of the top 10.

Not only is it the only regional port that has not recovered to pre-Covid throughput levels, but competitors such as Tianjin have been racing away to entrench themselves firmly in the 20m teu category.

Other nearby mainland ports such as Xiamen, recently consolidated under the Fujian Port Group and with ambitions to reach 20m teu by 2035, are also in line to displace Hong Kong.

Meanwhile, top European hub Rotterdam is on its heels and recovering sharply from pandemic-related declines. So the inevitable seems ever closer.

Although volumes at the main container terminal complex at Kwai Tsing rose slightly by 0.9% to 14.6m teu, this was offset by the almost 10% decline in volumes from midstream operations, which are typically used by smaller regional lines.

Hong Kong's position as the most efficient transshipment port in South China and gateway to the mainland continues to come under pressure.

In some instances, it has even had an adverse effect on performance, as the flipside to a high dependence on the world's second-largest economy has been exacerbated by central government policies.

Every disruption to Chinese manufacturing exports has shown up as a corresponding blip in the port's throughput figures.

For example, power cuts and Covid outbreak issues in September and October 2021 are believed to be the reason for Hong Kong's nearly 7% decline in October.

A hit of more than 10% to throughput in December 2021 coincided with Covid outbreaks in Zhejiang and Xian and marked the first of China's more recent spate of city-wide lockdowns that have continued into 2022.

Nevertheless, building on the momentum of the Hong Kong Seaport Alliance, formed in 2019 to consolidate Hong Kong's main terminal operators, the port remains a key transshipment hub, while also evolving to leverage on its strengths.

HKSPA is currently running 169 intra-Asia services and a comprehensive network that consists of around 230 weekly liner calls.

It claims to be the largest intra-Asia hub in the Guangdong-Hong Kong-Macao Greater Bay Area, as the central government's grand development plan for South China is dubbed.

The port seems to be pivoting to more niche segments, such as becoming a cold chain specialist. With more than 7,800 reefer points, HKSPA says its terminals have twice the capacity of other South China terminals.

With 60% of Hong Kong's fruit imports re-exported to the mainland, HKSPA claims its efficiency and free port status are big advantages in the cold chain market. Volumes during

the 2020/21 Chilean cherry season, for example, grew by 54%.

The port also continues to make the necessary infrastructure improvements to keep up with the competition in an increasingly digitised world.

All import and export procedures are expected to be fully digitalised before the end of 2022, while more automation has been introduced, with Cosco-HIT terminals putting 17 remote-controlled cranes into operation.

Upgrades such as the remote reefer monitoring system are expected to help capture growing business opportunities in the cold chain logistics market.

In 2021, the port's common barge platform was upgraded to improve the turnaround time of the barges, which form a key part of Hong Kong's transshipment network to the mainland.

Policy changes, such as raising the air draught limit at a major bridge on the route to western Shenzhen ports and reciprocal pilotage between Hong Kong and Yantian in western Shenzhen, have further increased network efficiency within the GBA.

However, along with the recent relaxation of cabotage rules at certain North China ports and the possibility of extension to ports further south, it is unclear whether these changes will help boost Hong Kong's transshipment volumes or further detract from them.

HAMBANTOTA INTERNATIONAL PORT



Ten Nautical Miles From The Global Trade Route



Port Services

Container terminals
Ro-Ro terminals
Oil terminals
Bulk terminals
Cruise terminals
Ship repairs/Layups
Crew changes

Port Related Industry

Supporting services
Port-Park-City model
Community development

Integrated Logistics

Bonded warehouse
Value added services
Duty free facility
Logistics finance
Wholesale centre
Product exhibition

Energy Hub

IMO2020 compliant
Marine bunker
LPG / LNG
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Hong Kong: edging closer to being bumped out of the top 10 ports.

Amid dramatic changes in the market and the macro environment, it seems Hong Kong has little choice but to accept its assigned role within the GBA to its detriment or otherwise.

HKSPA says it is given to understand that the mainland authorities' cabotage tweaks are meant to help draw more transshipment cargo from other Asian ports to Shanghai and not to divert cargo away from Hong Kong.

Yet with other ports in the zone, such as Guangzhou and Shenzhen, not only already

having significantly higher volumes but also growing at a much more rapid pace, it may be a moot point in the end.

At the HKSPA's launch, it set out to reclaim the 2m teu Hong Kong port had lost over several years. More than a year of full operations later, not only has throughput eroded further, but this target has also quietly dropped from the narrative.

With all the developments happening around it, Hong Kong's recent stagnation may well signal a major shift for the port, as well as the city, as it redefines itself, and

international rankings may be less relevant than they once were.

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)

— NO CHANGE

Throughput 2021: **15,300,000 teu**, **↑ 6.6%** (2020: 14,349,446 teu)

10 Rotterdam (Netherlands)

Congestion leads to fewer vessel calls, but the port unloads more containers per call, putting increasing pressure on terminal efficiency

CONTAINER throughput at the port of Rotterdam increased by 6.6% during 2021 compared to 2020, with volumes reaching 15.3m teu.

Boosted by the surge in

imports from Asia, due to the pandemic lockdown leading to spending on goods rather than services, Rotterdam's container throughput in 2021 was its highest ever.

This surge in volumes put a strain on many major box ports worldwide and Rotterdam was no exception.

In particular, liner operators on the Asia/Europe trades were

forced to reduce the number of port calls, or change service rotations, due to significant port congestion.

For Rotterdam, this resulted in a reduction in port calls of large containerships operating to and from Asia by 10% — yet average container discharge and load per vessel call increased by 20%.

This included containers destined for other ports such as Felixstowe and Hamburg, for which calls had been regularly skipped due to worsening port congestion there.

As a consequence, this increased pressure on landside operations at Rotterdam, with containers awaiting loading to other European ports being left for several days — or, in some cases, weeks.

At the same time, the logistics sector was plagued by employee absenteeism due to infection and quarantine measures.

Against this backdrop, the port of Rotterdam's record container throughput was a major achievement and allowed it to strengthen its market share relative to other major container ports in Northern Europe.

Major infrastructure projects completed at Rotterdam during 2021 included Maasvlakte Distribution Park West, which is being marketed as a premium logistics location for property developers, investors, shippers and logistics service providers.

The Port of Rotterdam Authority also co-ordinated and implemented the Theemswegtracé viaduct project, in conjunction with ProRail and the Ministry of Infrastructure and Water Management.

The Theemswegtracé improves the accessibility of the port, reduces CO2 emissions and takes pressure off the road network.

Meanwhile, Hutchison Ports and APM Terminals finally closed the deal (originally mooted in 2019) that saw the APMT Rotterdam terminal



Rotterdam: recently completed the Maasvlakte Distribution Park West.

change hands as part of Hutchison's plans to expand its operations at Rotterdam.

Hutchison, which already owned the Euromax terminal in Rotterdam, stated it would maintain the facility as an independent unit and has secured volume commitments from Maersk itself.

APMT Rotterdam was the older of two terminals at the Dutch port operated by APM Terminals, which opened its newer Maasvlakte II facility in 2015 as one of the world's most highly automated terminals.

New projects currently under way at Rotterdam include the Container Exchange Route, which will enable transportation of containers within Maasvlakte without taking up any barge, rail or truck-handling capacity at the terminals.

A new dedicated 17 km road network will connect all terminals, container depots, distribution centres and customs facilities on the Maasvlakte.

New quay walls currently under construction at Amaliahaven will add 1,825 m of deepsea quay and 160 m of inland waterway quay, while 360 m of earth-retaining structure will be built on both sides of the port.

The Rotterdam Food Hub is now taking shape along the

Calandkanaal at the entrance to the Maasvlakte.

This 60-hectare industrial site is being built to provide companies in the agrofood sector with improved facilities and will form the heart of Rotterdam's plans to further expand its position as western Europe's largest transit port for agricultural, horticultural and fishery products.

Finally, the Maasvlakte-Zuid Railway Yard, which has a planned completion date of 2030, will cater for growing container volumes at Rotterdam and will involve the phased construction of two six-track bundles that connect to the APMT outer contour, as well as Europoort and Botlek.

To accommodate this growth, the port authority is working closely with ProRail on improvements to the rail track and the ongoing development of the port railway line.

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)

— NO CHANGE

Throughput 2021: **13,742,000 teu**, **↑ 1.9%** (2020: 13,488,000 teu)

11 Dubai (United Arab Emirates)

The Middle East's leading box gateway hub is back in growth mode after three years of decline, but rivals are nipping at the heels of DP World's flagship operation

AFTER three consecutive years of volume declines, compounded last year by Covid-induced disruption, operations at DP World's flagship Jebel Ali are finally back in growth mode — and the port is investing heavily to ensure it stays that way.

Throughput may only be up 1.9% — a figure that pales in comparison to the jumps seen elsewhere among the top-tiered ports on our annual listing — but Dubai is nonetheless a regional leader. Container volumes across the Middle East only grew by 1.5%.

DP World argues that the softer volumes are due to the loss of low-margin throughput as supply chains struggle to keep pace and they remain focused on more profitable origin and destination cargo.

While the turnaround from previous years' losses into throughput growth is encouraging, the reality is that others are growing faster

— meaning Dubai is falling further behind the top 10.

Rotterdam has extended its lead on 2020 and Malaysian hub Port Klang is within striking distance of overtaking in 2022's rankings if Dubai fails to increase the pace — in volume terms, at least.

DP World is investing heavily to ensure that does not happen. Having sold a 22% stake worth \$2.5bn to long-term collaborators CDPQ, the Canadian pension fund, DP World is touting growth prospects based on fast-growing markets and trade routes in Africa and South Asia.

The fact that DP World has also said a further \$3bn in stake sales could be earmarked for long-term foreign investors suggests the company has significant plans ahead.

Dubai took DP World private in early 2020 to help the company better manage its borrowings.

Two key projects are

already under way at Jebel Ali. Container Terminal 4 — which ultimately promises to boost Jebel Ali's capacity to 22.4m teu — has been under construction in various phases for several years, albeit with no clear timeline on the final completion date.

A more immediate development is the digitisation projects and its so-called 'Boxbay' storage concept.

The joint venture between DP World and German industrial engineering specialist SMS Group stores containers in slots in a steel rack up to 11 high, delivering three times the capacity of a conventional yard and cutting its footprint by 70%.

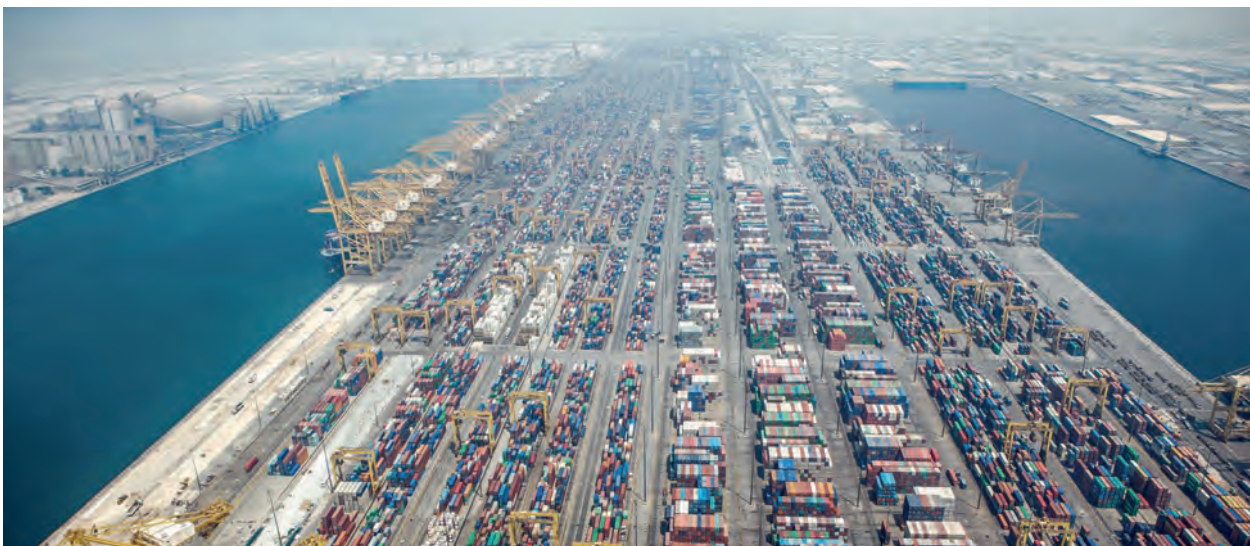
Port authority: DP World, PO Box 17000, Dubai UAE

Website: www.dpworld.com

Email: info@dpworld.com

Terminals (Operators):

Container Terminal 1 (T1) (DP World)
Container Terminal 2 (T2) (DP World)
Container Terminal 3 (T3) (DP World)



Dubai: DP World is investing heavily to ensure it is not overtaken in the rankings.

DP World

— NO CHANGE

Throughput 2021: **13,724,460 teu**, **↑ 3.6%** (2020: 13,244,423 teu)

12 Port Klang (Malaysia)

Having overcome the precarious congestion issues that plagued it in 2020, the Malaysian port books positive growth in throughput handling

PORT Klang in Malaysia handled 13.7m teu in 2021, up 3.6% year on year, on higher transshipment volumes.

Westports, controlled by Westports Holdings, accounted for 10.4m teu, down 1% year on year.

However, Northport, controlled by MMC Holdings, handled the remaining 3.3m teu, up 20.7% from 2020.

The significant growth was due to the commencement of 15 new services. Northport also received 150 ad-hoc calls due to congestion at neighbouring ports.

In 2021, both Westports and Northport were on an expansion drive.

Westports completed the development of its new Liquid Bulk Terminal 5. The terminal has a draught of 14 m and is designed to handle very large gas carriers and Q-Max ships, the largest liquefied natural gas carriers in the world.

Storage facilities at the

new terminal comprise two refrigerated tanks and four pressurised bullets to provide an additional storage capacity of 134,400 cu m.

Westports also expanded its container ground slots storage by 12% to 52,455 slots, and boosted its reefer capacity by 58% to 4,132 reefers.

In addition, it added 12 rubber-tyred gantry cranes and 54 terminal trucks.

Over at Northport, it commenced its NDSB2 operations, which comprises three units of new warehouses built to cater for new logistics businesses and a regional distribution centre.

The 349,771 sq ft of warehouses are equipped with modern features, including LED lighting and solar panel power.

Northport's current infrastructure investments and developments include a purchase of 23 RTG cranes to replace old and ageing equipment to further boost

terminal efficiency and productivity.

The full delivery of the new RTGs is targeted by July 2023.

It is looking to expand its yard capacity with the construction of a new block of its container yard (J Block), which is expected to provide an additional capacity of 531,732 teu and due to be completed by May 2023.

Northport is also looking to purchase 11 units of electrified rubber-tyred gantry cranes to be used in the new J Block, to be fully delivered by December 2023.

Northport's port reception facilities, the facility for vessel waste, which has been operating since 2021, is the first on-site facility of its kind among Malaysian ports.

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

Website: www.pka.gov.my

Email: cckoh@pka.gov.my

Terminals (Operators):

Westports (Westports Holdings)

Northport (MMC Holdings)



Port Klang: Malaysia's busiest port, and the second-largest in Southeast Asia.

Westports Holdings

13 Xiamen (China)

Port's position as the leading container facility in the Chinese province of Fujian is affirmed

THE port of Xiamen maintained a sustained level of growth in 2021 amid another coronavirus year.

As a major gateway port in China's Fujian province, its annual growth in container throughput stood at 5.6% in 2021.

Though the city experienced several rounds of Covid infections in July and September 2021, Xiamen's previous experience in coping with the coronavirus fallout enabled it to respond swiftly and minimise the impact of the disease.

In addition, growth was partly led by Fujian province's blueprint to consolidate the local port sector.

The government said this would help ports to differentiate their responsibilities and work together for the overall benefit of the regional economy.

Xiamen's position as the leading container port in the province has been affirmed.

The implication of the initiative was that other ports in the cluster — especially Fuzhou and Quanzhou, which have been keen to expand their international liner shipping routes — have had to reduce such ambitions and support Xiamen's international container shipping business.

On the other hand, Silk Road Shipping — an alliance initiated in late 2018 by Fujian province, with members comprising ports, carriers and logistics service providers in countries along the Belt and Road initiative — continued to be one of the growth engines for Xiamen in 2021.

In the first five months



Xiamen: growth was partly led by Fujian province's blueprint to consolidate the local port sector.

of 2021, Silk Road Shipping voyages from Xiamen port handled more than 1m teu, up 24.3% year on year.

The support from liner operators also pulled the port through the coronavirus fallout.

Maersk, for example, moved more than 20,000 empty containers from all over the world to Xiamen, relieving the pandemic-induced box shortage at the port.

Maersk's throughput at Xiamen exceeded 1.5m teu in 2021.

SITC International also signed a three-year collaboration agreement with Xiamen Port Holding Group, pledging to use Xiamen as a regional hub port in Fujian province, taking

advantage of the port's position along China's Belt and Road initiative.

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)



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14 Antwerp (Belgium)

Belgian port's merger with Zeebrugge aims to see a return to growth

ANTWERP, Europe's second-largest container port, failed to make any headway in 2021 in terms of volume — and was even knocked down a place in the rankings after being overtaken by faster-growing Xiamen in China.

Volumes were essentially flat over the previous year as congested supply chains led to terminals being forced to work above their capacity, slowing down their ability to serve ships and move containers.

“Despite the strong performance, 2021 was not an easy year for our port,” said Antwerp chief executive Jacques Vandermeiren.

“Thanks to the resilience and world-renowned qualities of our port community, we have returned to the 2019 pre-Covid level after barely a year.

“However, there continue to be important areas of concern, including short-term labour availability in this challenging

situation and the achievement of much-needed additional container capacity,” he added.

This will be the final year that Antwerp is listed on its own, however. In 2021, it announced it was to merge with neighbouring Zeebrugge to form a unitary port authority covering both cities.

The pair have discussed merging their ports — which are about 100 km apart — since 2018, and the merger was formally completed earlier in 2022.

Volumes from Zeebrugge will add another 2.2m teu to the combined Port of Antwerp Bruges, as it is now known.

Mr Vandermeiren said the merger of the two ports was “visionary”.

“Together, we are stronger to face the challenges of the future.”

Those challenges include the pandemic and its aftermath, China's zero-Covid policy and

lockdowns, and the Russia/Ukraine crisis.

“For terminal operators, peaks in import cargo are very difficult to manage, especially when combined with dwell times for export cargoes rising,” he said.

“The whole supply chain becomes very inefficient. Goods start moving to other ports, so you get a diversion on flows of goods.

“On top of that, you have imbalances in the labour organisation and in the hinterland and intermodal splits.”

The solution was to increase the capacity of ports, especially in Antwerp, Mr Vandermeiren added.

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)



Antwerp: congested supply chains led to terminals being forced to work above their capacity.

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— NO CHANGE

Throughput 2021: **11,200,000 teu**, **↑ 14.3%** (2020: 9,800,000 teu)

15 Tanjung Pelepas (Malaysia)

Malaysian port benefits from ships re-routing due to congestion issues at other ports

PORT Tanjung Pelepas (PTP) recorded an impressive 14.3% jump in its throughput handling to 11m teu in 2021, from 9.8m teu accomplished in 2020.

The increase in total throughput was mainly due to the global market rebound and spin-off impact post-Covid-19, according to PTP chief executive Marco Neelsen.

"PTP has also benefited from many containerships activating their contingency plan via PTP for recovery on cargo overflow scenarios due to congestion issues faced in many ports," Mr Neelsen said.

Through the Ipsum Magna (Latin for 'great optimisation') programme unveiled in 2019, numerous capacity improvement projects have been executed as part of the overall plan to increase the port's productivity and capacity based on the existing footprint, Mr Neelsen said.

The key projects expected to be completed in 2022 include the delivery of seven ship-to-shore quay cranes that will replace the existing ones at PTP's Phase 1 berths.

Together with this, 11 fully electric rubber-tyred gantry cranes will also be delivered to replace existing older units.

Construction of an additional 9.5 ha of container yard is currently ongoing at the Phase 2 area, and this will be fully utilised for storage by the third quarter of 2022.

As part of the plan to increase the quay footprint, PTP will be embarking on an infrastructure expansion by constructing a 455 m additional berth north of the existing Berth 1.



Tanjung Pelepas: enjoyed a double-digit jump in its throughput handling last year.

Port of Tanjung Pelepas

The development will include construction of 14 ha of container yard that will be located behind the new expansion.

In April 2022, PTP signed a contract to procure an additional three STS cranes as part of the overall replacement programme.

These new units are expected to be fully operational by the end of 2023, which will further contribute to the capacity of the port.

With some of its equipment having already been in operation for more than 15 years, PTP is also actively carrying out inspections on these units as part of the plan to tailor its maintenance regime to ensure minimal disruption to operations.

Development of the PTP Free Zone area is also ongoing.

Phase 2C — which is an extension of Phase 2 of Pelepas Free Zone, with 32.8 ha of land — is currently being developed with the basic infrastructure for leasing in the second quarter of 2023.

Prospective investors can lease land parcels for 30 years at competitive rates to build warehouses for short- and long-term rentals or factories for light and environmentally friendly manufacturing activities.

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

Website: www.ptp.com.my

Email: admin@lpj.gov.my

Terminals (Operators): Pelabuhan Tanjung Pelepas (MMC Corporation)



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16 Los Angeles (United States)

Largest port in the US breaks the 10m teu barrier for the first time

AFTER a pandemic-driven decline in volumes during 2020, Los Angeles bounced back in 2021 to finally break through the 10m teu per year barrier — a first for the US's largest port.

Like its slightly smaller San Pedro Bay neighbour Long Beach, Los Angeles fell victim to the rapid resumption of containerised freight imports into the US during 2021 and struggled to keep up with demand.

The absence of any meaningful post-Chinese New Year slowdown in 2021 meant that Los Angeles remained in a permanent peak season throughout most of the year.

Yet as more cargo came in, the hinterland supply chains needed to move it off dock seized up, as shortages of rail, truck and warehouse capacity ground down the usually smooth flowing progress of containers.

The unrelenting boom in trade led to the tailbacks of ships waiting to berth getting ever longer, to the point that a number of lines started diverting from the port to head elsewhere.

Getting cargo out of the port became a key concern for Los Angeles executive director Gene Seroka — particularly as nearly one-third of reservations to collect cargo were going unused at times.

"The less manoeuvrability they have on the tarmac when the next ship comes in, that's the fewer containers they can take off that ship — and the ship behind it backs up as well," Mr Seroka said

Having some control over the terminal became critical as congestion built, so it was little



Los Angeles: getting cargo out of the port became a key concern.

Port of Los Angeles

wonder that CMA CGM bought back — at great expense — the Fenix Maritime Services terminal it had sold in 2017 to EQT Infrastructure and P5 Infrastructure.

"In order to manage efficiently our port operations on the west coast of the United States, we have decided to acquire Fenix Marine Services," said CMA CGM chief executive Rodolphe Saadé.

"It is a key industrial facility, which will significantly strengthen our position and support our rapid growth in this market."

Los Angeles' threatened but unimplemented container dwell fee has helped move containers through the port and eased the burden — but with another peak season approaching, there is a further threat that could lead to even greater congestion.

The labour contract agreement between the International Longshore and Warehouse Union and the Pacific Maritime Association

expired on July 1, 2022. Talks began on a new contract in May, but both sides warned that a new agreement would not be in place by the time the current one expired.

Although both have insisted that this is not a cause for concern, fears of labour disruption — such as happened in 2014–2015 — have been partially behind the movement of much cargo to the US east coast.

Should this happen again in 2022, delays and congestion could once again shoot up at Los Angeles.

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

Website: www.portoflosangeles.org

Email: community@portla.org

Terminals (Operators):

Berths 100-102: (West Basin Container Terminal)

Berths 121-131: (West Basin Container Terminal)

Berths 136-147: (TraPac)

Berths 212-225: (Yusen Terminals)

Berths 226-236: (Everport Terminal Services)

Berths 302-305: (CMA CGM)

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

1

Throughput 2021: **9,864,448 teu**, **↑ 2.5%** (2020: 9,621,662 teu)

17 Kaohsiung (Taiwan)

Taiwan's busiest port attributes rise in throughput to the recovery of global business activities

KAOHSIUNG port reported a 2.5% increase in its container throughput to almost 9.9m teu in 2021.

The rise in volume was attributable to the recovery of the global economy, a spokesperson for the Taiwan International Ports Corporation said.

The accelerated Covid vaccination programme led to the easing of market restrictions, and more stable global business activities.

In addition, there was a higher consumption demand for digital technology applications, as the stay-at-home economy and virtual businesses grew in volume, the spokesperson said.

On its part, TIPC has promoted a self-managed container terminal support system to increase operational capacity and improve working efficiency.

As operations stabilised, TIPC has pushed forward with the construction of the seventh container terminal at the port.

The project will comprise five deepwater wharves and 149 ha of yard area, which



Kaohsiung: located in the south of Taiwan, the port handles 70% of the country's container volume.

Taiwan International Ports Corporation

can accommodate the world's largest container vessels of up to 24,000 teu.

The new terminal has the potential to be a fully automated operation, with cargo-handling capacity of 4.5m teu per year, and plans to boost the capacity further to 6.5m teu per year in the long term.

The completion of the new terminal will boost the international competitiveness of Kaohsiung port and strengthen its position as a maritime hub, TIPC said.

Construction of the new terminal will cost TW\$16.3bn

(\$545.8m) and is expected to be completed by December 2024.

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

Website: kh.twport.com.tw/en

Email: message@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); Berth 120 (Yang Ming); Berth 121 (NYK Line)

Terminal 5: Berths 76-78 (Hyundai Merchant Marine); Berths 79-81 (Evergreen Line)

Terminal 6: Berths 108-111 (Kao Ming Container Terminal Corp)

1

Throughput 2021: **9,384,368 teu**, **↑ 15.7%** (2020: 8,113,300 teu)

18 Long Beach (United States)

Record throughput is seen as the US west coast port prepares for another busy peak season

LONG Beach, the second-largest port in the US following neighbouring Los Angeles, was seldom far from the news

in 2021, often for the wrong reasons.

As US consumer demand soared, the two San Pedro

Bay ports — which together account for 40% of the US's total container imports — faced a surge of imports.

Long Beach, which had already seen volumes rise by more than 6% during the first year of the pandemic, saw another 15% increase in 2021.

In total, volumes through Long Beach increased by 1.8m teu over two years — or a massive 23%.

Few other ports had that level of increase while retaining the same capacity.

The outcome was the much-reported build-up of containers and backlog of ships in San Pedro Bay — which, by the beginning of 2022, saw a record 109 ships waiting to berth at the two ports.

“No major international gateway has been immune to the impacts of global disruption, least of all the nation’s largest container complex,” said Long Beach executive director Mario Cordero.

“The US economy grew 5.7% in 2021. While orders surged, worker shortages disrupted supply chains. Confronting historical back-ups, we still managed to move more containers than ever. We broke monthly records for 11 straight months.”

For Long Beach, 2021 was a story of managing that volume and attempting to get containers off the terminals and into the supply chain.

That was achieved by using



Long Beach: saw a much-reported build-up of containers and backlog of ships in San Pedro Bay.

Darryl Brooks / Alamy Stock Photo

both the carrot and the stick. On the one hand, there was encouragement of the move by Total Terminals International to launch a pilot programme of 24-hour cargo pick-up.

Other steps included a partnership with the Utah Inland Port Authority to move goods more quickly off the port’s property via rail.

The 'stick' came in the form of a threatened dwell fee that would have seen carriers — and their customers — charged an increasing fee for every container that stayed in port above nine days in the case of boxes moved by truck, or six days for rail moves.

After that time, carriers would be charged \$100 per container, rising at \$100 increments per container per day until the container left the terminal.

That amount could have soon added up and it proved to

be such a successful incentive that its introduction has never been implemented — although it remains on the books as a threat should conditions worsen.

Its positive effect has been to reduced container dwell times significantly — and, with it, the backlog of vessels, which has dwindled in number.

As the port heads into its next peak season, it remains to be seen whether congestion will increase again, or if Long Beach has finally got over the hump.

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)

➤ 2

Throughput 2021: **8,985,929 teu**, **➤ 18.5%** (2020: 7,585,819 teu)

19 New York / New Jersey

(United States)

Congestion at the port worsens as lines diverting to the east coast add to the logistics pressures

THE largest east coast port in the US has been buckling under the pressure of its

record-breaking volumes as ships circumvent the logistics logjams on the west coast and

sail direct to the port of New York & New Jersey.

Throughput at the US’s



New York & New Jersey: as the busiest time of the year looms, congestion is rising.

Port Authority of New York & New Jersey, and CMA CGM

third-busiest port has consistently increased over the pandemic, with volumes up nearly 13% year-to-date so far in 2022.

This suggests the consumer boom that has driven teu imports is moderating. In 2021, the port's centenary, throughput was up 18.5% from pre-pandemic levels, at nearly 9m teu.

As the peak season began over 2022's second half, as

many as 20 containerships were seen at anchorage outside the port's terminals, some waiting more than 14 days to berth.

Port management had previously lauded their ability to avoid bottlenecks seen on the west coast over the past two years — but as the busiest time of the year looms, congestion is rising.

Ships as large as 16,000 teu have now been calling NY & NJ, reflecting projects

to deepen harbour channels and accommodate ultra large classes.

Loaded exports are down 3.5% year to date — not as steep as the 40% decline seen in west coast ports, where container lines have attracted strong criticism from regulators for prioritising empty containers.

In June 2022, the US Army Corps of Engineers signed off on a plan for further harbour deepening, which would increase the manoeuvrability of larger vessels using the port's five container terminals. This had led to inefficiencies as some ships had to be light-loaded.

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

Website: Pwww.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)

2

Throughput 2021: **8,715,000 teu**, **↑ 2%** (2020: 8,540,000 teu)

20 Hamburg (Germany)

Port authority completes work on the fairway adjustment, designed to improve planning capacity at the port's terminals

HAMBURG — a key port at the European end of the Europe/Asia trade, and home to both Hapag-Lloyd and Maersk affiliate Hamburg Süd — clawed back some of the throughput in 2021 that it lost during the coronavirus pandemic, with a modest gain of almost 200,000 teu.

Much of that was down to good development in container traffic with its major trading partner, China, which accounted for 2.6m teu of the boxes it

handled — or somewhere in the order of three out of 10. In addition to seafreight, Hamburg also saw positive development on its Silk Road rail connections, with more than 20 destinations in China. In total, some 160,000 teu was carried by rail between Hamburg port and China.

There was also a notable 4.5% increase in container traffic with the US.

The successful widening and deepening of the Elbe fairway is seen as an essential measure

for maintaining the Port of Hamburg's competitiveness.

2021 also saw work commence on the first phase of the planned fairway adjustment — now complete — which is designed to improve planning capacity at container terminals and other port terminals.

In combination with the investments made by port authority HHLA for mega gantry cranes and automated storage technology, the adjustment now implemented enables the



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port and terminal operators to swiftly and reliably clear the largest containerships.

Vessels longer than 360 m can now be given longer ex-berth sailing windows.

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)



Hamburg: saw good development in container traffic with China.

HMM / Michael Lindner

71

Throughput 2021: **8,335,384 teu**, **↑ 9.7%** (2020: 7,546,500 teu)

21 Laem Chabang (Thailand)

Thailand's busiest port ramps up the third phase of its expansion plan, aiming to boost handling capacity to 18m teu per year

LAEM Chabang port recorded an impressive 9.7% increase in container throughput in 2021, as the world economy picked up pace and recovered from the supply chain disruptions caused by the Covid pandemic.

In 2022, the Port Authority of Thailand is ramping up phase 3 of its expansion plan to meet increasing need for international shipping and become a regional gateway and trading centre.

Under this phase, Laem Chabang port will construct two container terminals, terminal E and F, with a capacity of 7m teu, to boost the port's handling capabilities to 18m teu annually.

In addition, it will also construct one multi-purpose terminal, one coastal terminal and one service terminal.

The PAT is also ramping up its Single Rail Transfer Operation system, to transport cargo in and

out of the port via railway.

SRTO completed phase 1 in 2016 and was equipped with the basic and necessary infrastructure, with the capacity to handle 1m teu per year.

SRTO phase 2 will be completed in 2023 and is currently acquiring six heavy-lift cranes, including two rail-mounted gantry cranes and four rubber-tyred gantry cranes.

The PAT is also in the process of hiring sub-contractors to manage rail track operations with a five-year contract.

Rail transport will help save

energy, reduce pollution and help save transportation costs, the PAT said.

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

Website: www.laemchabangport.com

Email: contact@laemchabangport.com

Terminals (Operators):

LCB Container Terminal 1 (APM Terminals)

LCMT Company (APM Terminals)

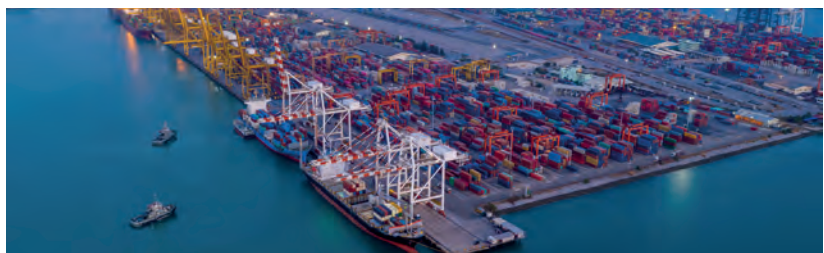
TIPS (TIPS Co)

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)



Laem Chabang: aiming to become a regional gateway and trading centre.

2

Throughput 2021: 7,956,133 teu, ↑ 1.3% (2020: 7,854,091 teu)

22 Ho Chi Minh City (Vietnam)

Vietnam's biggest port holds firm in the face of sluggish national growth

GROWTH may have slowed, the pandemic may have continued to spread, but Vietnam's biggest port saw through 2021 to keep on expanding.

Vietnam's economy experienced a 2.5% growth rate in 2021 — a level the government has recognised as its lowest in decades.

Yet despite the sluggish growth in 2021, the country's trade rose significantly: exports increased by 19% in terms of value compared to 2020; while imports increased by 26.5%, with the US, China and the European Union being the key trading partners.

Most of Ho Chi Minh's burgeoning throughput has been handled by the Tan Cang Cat Lai feeder terminal, Vietnam's largest single terminal, operated by Saigon Newport Corporation, which serves as a connector for other Asian countries.

In other notable milestones for the port, China United Lines launched a new weekly service in 2022 to Tan Cang-Hiep Phuoc terminal in a further boost to the port's Chinese links.

Vietnam is poised to grow



Ho Chi Minh City: most of its throughput is handled by the Tan Cang Cat Lai feeder terminal. Saigon Newport Corporation

as a strategic supply chain interlocutor and a centre in its own right.

Ho Chi Minh's future as an international and regional trade hub could expand further yet, and the region itself could see important changes.

MSC is reportedly leading a recent application to build a \$6bn port in the Can Gio region, on the southern flank of Ho Chi Minh City, in a decades-long project that would establish the country's biggest terminal and a new international mainstay.

The permission and application of the project would

have significant effects for Ho Chi Minh and trade in the region more broadly.

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 (Gemadep)

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)

1

Throughput 2021: 7,250,000 teu, ↑ 5.8% (2020: 6,854,762 teu)

23 Colombo (Sri Lanka)

Sri Lankan port is riding high, with record throughput and efficient regional leadership, but progress could be scuppered by a domestic economic crisis

THE Port of Colombo recorded an all-time-high throughput of more than 7.2m teu in 2021, following last year's Covid-induced

contraction. Whether it will be able to continue that trajectory amid a domestic economic collapse remains to be seen.

A combination of external shocks — notably a collapse of tourism during the pandemic and spiking commodity prices

following Russia's invasion of Ukraine — have depleted Sri Lanka's foreign-currency reserves and raised consumer-price inflation to almost 30% year on year, sparking domestic political turmoil and severe fuel shortages across the country.

The port has continued trading in spite of the conflict happening around it and, for the first four months of the year, it had managed to put in a respectable 4% year-on-year growth rate.

The Colombo port's terminal operators, along with shipping lines' agents, have all reassured global customers that it is business as usual in the South Asian hub, despite the ongoing economic and political crisis and social unrest.

The Sri Lankan government also tried to mitigate the damage by granting a 40-year tax break, in the hope it would attract foreign investors.

However, with some traffic already heading towards South Indian ports amid fuel shortages and disruption, next year's position for Colombo in this ranking could be lower, depending on the length of the crisis.



Colombo: continued trading in spite of the conflict happening around it.

ZUMA Press, Inc / Alamy Stock Photo

Nevertheless, at the time of this annual report going to press, the port was ploughing on regardless, touting its position as “the most efficient port in South Asia and the Indian Sub-Continent”, according to a recent World Bank report.

The port authority is also pushing on with its development projects, kicking off phase two of the Eastern Counter Terminal Expansion in January 2022, which will allow it to handle the largest container vessels and double existing capacity.

The \$1bn project will expand the terminal to 1.3km and equip it with 12 giant ZPMC cranes.

The latest phase of the project was due to be completed by July 2022.

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)

1

Throughput 2021: **7,173,870 teu**, **↑ 24.3%** (2020: 5,771,200 teu)

24 Tanger Med (Morocco)

New terminals at the Moroccan port help push throughput up by almost 25%

TANGER Med has cemented its position as the leading transshipment hub in the Mediterranean Basin after volumes rose by almost one-quarter during 2021.

Total container volumes of 7.2m teu were up 24.3% on 2020, which had already recorded a 20% rise.

The boost in traffic was largely due to the successful

commissioning of the TC4 terminal in 2019 and TC3 at the Tanger Med 2 development at the beginning of 2021.

“This result confirms the leadership of Tanger Med in the Mediterranean and Africa, and consolidates the position of this major hub for global maritime alliances, led respectively by Maersk Line, CMA CGM and Hapag-Lloyd,”

Tanger Med said in a statement. The Moroccan port now dominates volumes in the Mediterranean, outshining near neighbours Algeiras and Valencia in the western Med, and Piraeus in the east.

What makes this more remarkable is that Tanger Med was only launched 15 years ago, and has gone from nothing to a top 25 global port in that time.

The total tonnage of goods handled by the port broke the 100m tonnes mark and now represents more than half of the tonnage handled by all ports in Morocco.

In 2021, Tanger Med pushed forward with its digitalisation efforts, allowing all container and truck import and export formalities to be conducted digitally through a port community system.

“The total digitisation of the import and export port passage makes it possible to fluidify the operations, to guarantee a high level of security for goods flows, and to meet the customers’ expectations for the strengthening of the digitisation, transparency and predictability in service of the logistics competitiveness,” Tanger Med said.

Total digitisation of the port

passage became mandatory starting from February 2022.

With the Tanger Med II development now fully operational, the port has a total annual capacity of 9m teu.

While its explosive growth phase is probably now over, if it continues to grow to its full capacity, it could easily become

one of the top 20 container ports in the world.

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

Website: www.tangermed.ma

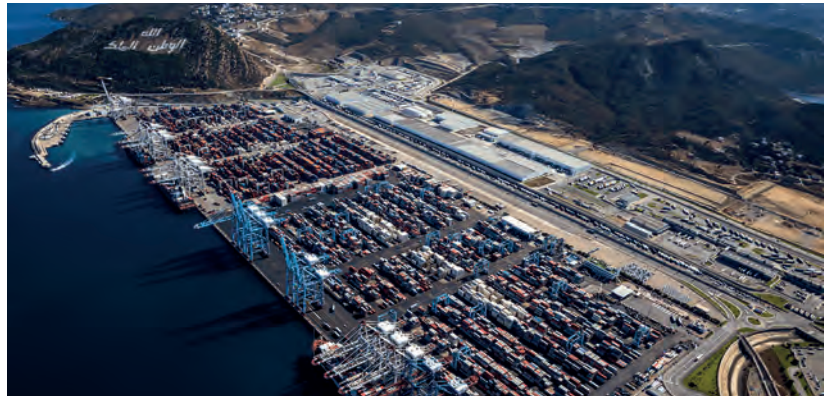
Email: m.fares@tangermed.ma

Terminals (Operators):

APM Terminals Tangier (APM Terminals)

Eurogate Tanger (Eurogate)

TC3 (Tanger Alliance)



Tanger Med: the leading transshipment hub in the Mediterranean Basin.

Tanger Med Port Authority

7 5

Throughput 2021: **7,037,900 teu**, **35%** (2020: 5,212,000 teu)

25 Taicang (China)

A combination of the fruition of well-laid plans and the shifts brought about by Covid lead to a spike in volume

TAICANG port stands out as the fastest-growing port in China, as well as in the Top 100 list, with throughput up 35% to just over 7m teu.

A combination of the fruition of well-laid plans and the volume shifts brought about by Covid helped to solidly entrench the Yangtze River Delta port as the main feeder hub port for Shanghai.

During 2021, the Yuan1.1bn (\$162.2m) fourth phase terminal expansion brought automated operations to the port, while the addition of five new berths will increase capacity by 2m teu.

Overall, Yuan3.2bn was pumped into the port during

2021, including the launch of the Taicang Port Shugang Railway Special Line, one of 12 key rail-port intermodal projects on the Yangtze River trunk line.

Efforts have also been made to boost services and connectivity to realise the port's ambitions of being not just a river-sea transit hub port, but also entering the regional feeder and deepwater markets, with the aim of achieving its 14th Five-Year Plan goal of hitting 10m teu in throughput.

Services have been introduced to boost domestic port connectivity in line with China's dual-circulation policy, while a combination of new dedicated

feeders and improved port procedures has helped boost its links with Shanghai.

A slew of new policies from customs and port authorities in Shanghai and surrounding ports has allowed imports to be transhipped directly onto inland feeders and eventually cleared at the destination port.

Meanwhile, niche regional routes, such as to the Asean region, were also introduced.

These include new services to Ho Chi Minh City, which increase Taicang Port's Southeast Asian routes to four, covering key ports such as Haiphong and Ho Chi Minh City in Vietnam and Bangkok and Laem Chabang in Thailand.

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Taicang: fastest-growing port in China, as well as in the Top 100 list.

Sipa US / Alamy Stock Photo

New domestic feeder routes include connections to important emerging ports in China's southwest, such as Haikou and Qinzhou.

Meanwhile, the Suzhou-Taizhou Express was introduced to connect manufacturing powerhouse Suzhou's main industrial parks to Taicang, while the Taicang Express feeder into Shanghai port has had its capacity increased to meet demand.

All the Yangtze River feeder lines call Taicang, including inland river barge branch lines in Chongqing and Anji. This has

seen river-sea transshipment volume rise by one-third to reach 3.7m teu in 2021.

Taicang port currently has 217 container liner routes, forming a route network of 23 inland river feeders, 71 Yangtze River consolidation routes, 51 coastal domestic trade routes, 31 direct regional routes, and 41 international deepwater routes.

Meeting the challenges and benefiting from China's ongoing Covid issues has also been a big factor in Taicang's success.

Amid the massive Shanghai lockdown earlier in 2022, a 200,000 teu annual capacity

empty container storage depot was launched in May by Shanghai Port and Taicang Port.

Other innovative measures included a 1,000 truck capacity Freight Relay Station in the port's Haitong Logistics Park, which has effectively enabled truckers to be kept within a closed loop to keep working and facilitate deliveries to the port.

Building on its role as a river-sea transshipment hub serving the north wing of Shanghai International Shipping Center, Taicang port has made continuous efforts to develop infrastructure and boost services.

This should hold it in good stead to meet its ambitious goals as China's economy recovers.

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)

3

Throughput 2021: **6,849,227 teu**, **↑ 11.7%** (2020: 6,134,006 teu)

26 Tanjung Priok (Indonesia)

Indonesian port works on several projects to reduce congestion on road access to its terminals

TANJUNG Priok port recorded an 11.7% increase in its throughput in 2021.

The impressive growth is attributed to the recovery of the global economy, marked with an increase in cargo for industrial and food products, according to a port spokesperson.

The current throughput has

recovered to the pre-pandemic levels of 2018 or 2019.

Under the management of Indonesia's state-owned Pelindo, the port is pushing for expansion of its container facilities at Kalibaru Terminal.

The New Priok Container Terminal 2 is out to tender. It will supplement the New Priok Container Terminal 1, which

has been in operation since September 2016.

Access to Tanjung Priok is mainly via roads, with almost non-existent rail access.

The port is currently building a 34 km Cibitung-Cilicing toll road. When completed, it is expected to facilitate land transport between the expansive industrial areas in



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CHITTAGONG PORT AUTHORITY

REDEFINING PORT SERVICES

New infrastructure development and improved service standards are redefining Chittagong Port as one of the South Asia's emerging and most important ports.

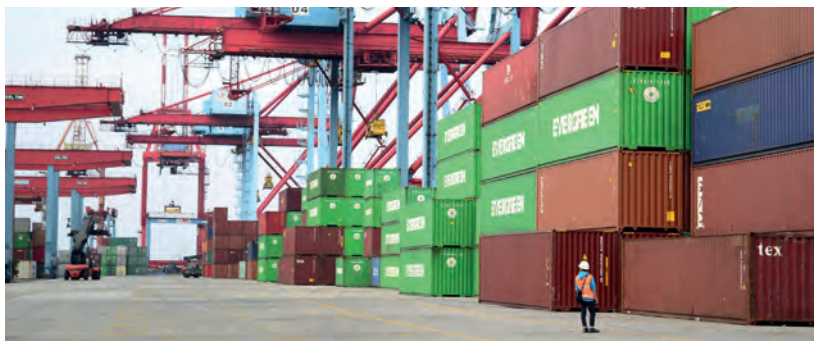
East Jakarta to the Tanjung Priok port.

The toll road will have four sections, one of which has been operating and is used by up to 20,000 vehicles per day, according to data supplied by Pelindo.

All four sections are expected to have finished construction and be fully functional by the end of 2022.

Finally, the port is also developing the New Priok Eastern Access project, a road access to connect the Tanjung Priok port and the Kalibaru terminals to the new Cibitung-Cilicing toll road.

The project aims to reduce congestion on the existing



Tanjung Priok: throughput has recovered to pre-pandemic levels.

Aflo Co Ltd / Alamy Stock Photo

roads leading to the port. It is also meant to connect the Jakarta hinterland to Tanjung Priok.

Pelindo is currently applying for development licences for the project.

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

Website: www.pelindo.co.id

Email: info@pelindo.co.id

Terminals (Operators):

Jakarta International Container Terminal (Pelindo II)

New Priok Container Terminal One (NPCT1)

Koja Container Terminal (Hutchison Ports)

1

Throughput 2021: **6,660,000 teu**, **↑ 17.7%** (2020: 5,656,594 teu)

27 Mundra (India)

Massive rise to record levels at India's largest container port are attributed to efficiencies

MUNDRA recorded impressive growth in 2021, mainly due to a post-pandemic recovery and efficiency gains. With record volumes handled, it retained its position as the largest container port in India.

The terminals are located in the deepwater, all-weather, berthing-on-arrival port in the Gulf of Kutch, on the country's west coast, in the state of Gujarat.

Adani, the port's operator, has ambitions to make it the largest integrated transport utility by 2030.

Adani is engaged in the road-to-rail conversion of containerised cargo from Morbi to Mundra.

It boasts the state-of-the-art container rake-handling facility to manage double-stack trains and has rail-mounted quay

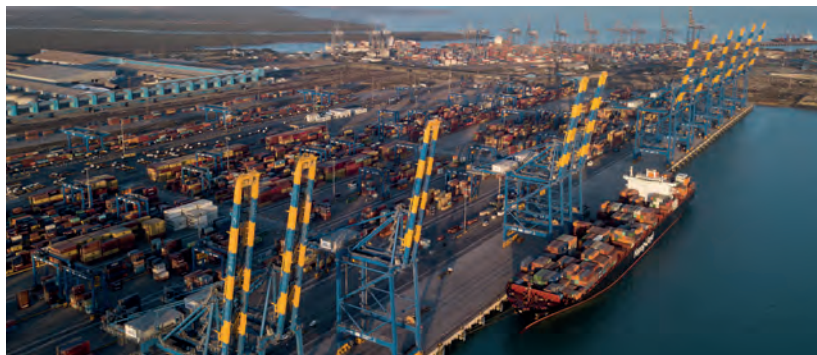
cranes, high-capacity grab ship unloaders and a fully integrated, high-speed conveyor system.

Rail-based container handling increased from 32% to 38%, while double-stack train handling improved from 39% to 48%, reducing delivered logistics costs and emissions, Adani said.

Mundra is a major economic gateway that caters to the northern hinterland of India. It has 26 berths in total and two single point moorings, with annual capacity to handle 264m tonnes of cargo, and dedicated terminals for different commodity types, such as dry bulk and liquids.

Its four container terminals, which can accommodate post-panamax vessels, have a capacity to handle more than 8m teu.

Five additional services have



Mundra: ambitions to be the largest integrated transport utility by 2030.

Adani Ports



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been introduced during the past year.

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

According to Fitch Ratings, about 40% of the total container

throughput is transshipment cargo. That is expected to rise to almost 50% in the current financial year. Utilisation has been at about 85%.

Late in 2021, a cocaine bust made headlines, when about 3,000 kg of the drug was seized by the Directorate of Revenue Intelligence at the port.

Port authority: Adani Ports and SEZ Ltd. Navinal Island, Mundra, Kachchh, Gujarat, 370421, India
Website: www.adaniports.com

Email: Customercare.CT@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)

3

Throughput 2021: 5,695,839 teu, 10.8% (2020: 5,142,300 teu)

28 Hai Phong (Vietnam)

Another year of robust growth reflects the underlying trend of the past decade for the North Vietnamese port

NORTHERN Vietnam's leading seaport cluster recorded another year of growth as terminal operators eye expansions to existing infrastructure.

Hai Phong's double-digit growth rate in 2021 meant the port has also doubled its annual traffic since 2012, according to data presented by Saigon Newport Corporation, the company that runs the port's deepsea and second-largest terminal, the Haiphong International Container Terminal.

Traffic at the port — which services all the major containership lines and consists primarily of river terminals — was boosted by increases in exports to Asia and the US, the port's largest markets, as well as import growth from Asia.

Tan Vu remained the largest port, with more than 1m teu handled in 2021, while Gemadept's Nam Hai Dinh Vu and the Dinh Vu Port Joint Stock Company's Dinh Vu terminal all handled well over 500,000 teu each.

HICT became the port of call for new services, including Maersk's service from Vietnam



Hai Phong: doubled its annual traffic since 2012.

Xinhua / Alamy Stock Photo

to the US west coast; Wan Hai Lines' service from Vietnam to the US west coast and from Vietnam to west India; and Zim's Vietnam-Australia service.

HICT will expand further, with plans to build two new terminals that will be operational by 2024, with a capacity to service 8,000 teu vessels. Another two terminals are also targeted to be built at the port by 2025.

Additionally, at the end of 2021, Gemadept launched the construction of the second phase of the Nam Dinh Vu terminal that will give it the

capacity to handle another 500,000 teu per year.

The project will culminate in the availability of six to seven berths of around 1,500 km, according to the company. It is expected to be completed in early 2023.

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)

10

Throughput 2021: 5,630,000 teu, ↑ 26% (2020: 4,470,000 teu)

29 Jawaharlal Nehru (India)

India's second-largest port reverses 2020 losses to post record volumes

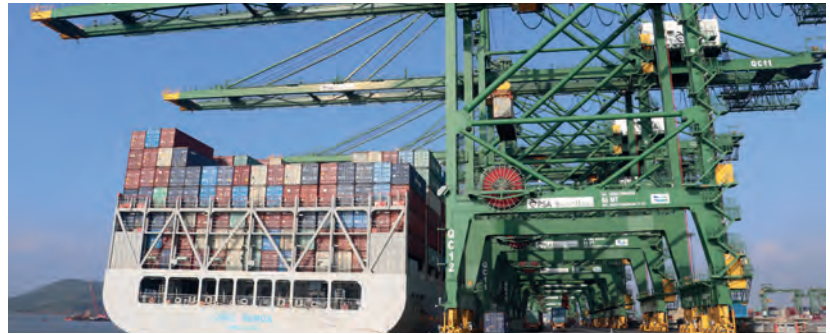
JAWAHARLAL Nehru port in Mumbai recorded a significant rise in volumes handled by the five terminals in 2021, recovering from losses in 2020.

Chairman Sanjay Sethi said he was pleased the port handled a record cargo level of more than 5.6m teu. He also highlighted how it handled the highest exim container traffic of any port in India.

The number of container vessels calling Jawaharlal Nehru rose to 2,103 in the 2021-2022 financial year, from 1,811 in the previous 12 months.

Of the total traffic, 33% was handled by APM's Gateway terminals India; 22% by PSA's Bharat Mumbai terminals; 21% by Nhava Sheva Gateway terminals; 17% by DP World's Nhava Sheva International Container Terminals; and 7% by Jawaharlal Nehru port container terminals.

Besides record volumes handled, another significant development was the launch of the dwarf container train service from the port, which



Jawaharlal Nehru: started trial operations on its newly dedicated berth for coastal shipping. PSA

marks a pivotal step towards streamlining the rail movement of exim cargoes via double-stacked containers.

This provides a competitive advantage by lowering hinterland logistical costs, while simultaneously enhancing rail-cargo traffic.

The port authority also started trial operations on its newly dedicated berth for coastal shipping under the Sagarmala programme, to provide an impetus for coastal cargo movements.

This berth will provide better infrastructure for coastal shipping and decongest rail and road networks, ensuring cost-competitive and effective multi-modal transportation solutions.

Further upgrades could be on the cards, potentially taking overall container capacity to 10m teu from the current design capacity of all terminals of around 7m teu.

Earlier in 2022, JNPCT, the oldest of the terminals, was hit by a cyber-attack, which forced it to halt some ship arrivals while diverting others.

Port authority: Jawaharlal Nehru Port Trust, Sheva, Navi Mumbai, Maharashtra 400702, India

Website: www.jnport.gov.in

Email: cma@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)

8

Throughput 2021: 5,613,163 teu, ↑ 19.9% (2020: 4,682,249 teu)

30 Savannah (United States)

Shifting container volumes lead to gains, but also congestion at the US east coast port

HIGH consumer spending increased imports to the port of Savannah, which reported positive container growth every

month in 2021 when compared to the previous year. In May 2021, the 2012-built, 16,000 teu CMA CGM Marco Polo docked to

load and unload an estimated 6,000 teu of cargo. It was the largest containership to call the US east coast at the time.



Savannah: projects are under way to improve capacity after a jump in inbound containers led to congestion.

Georgia Ports Authority

The port of Savannah has undertaken several projects to increase capacity to accommodate the surge in trade.

To help serve larger vessels, the Georgia Ports Authority is straightening the bend at a berth of Garden City Terminal. The renovations will add an estimated 1.4m teu per year of berth capacity by 2023.

The construction project will include the installation of 130 ft gauge ship-to-shore crane rails capable of

accommodating the largest cranes on the east coast. Not least, the expansion at container berth 1 in Garden City Terminal will provide an additional big ship berth by June 2023.

Garden City Terminal West Phase II adds 90 acres of container storage, a truck gate and electric rubber-tyred gantry cranes to serve a new site adjacent to the existing Garden City Terminal.

The project will increase the port of Savannah's annual

capacity by 1m teu, with the first phase coming on line in 2023.

The \$34m Peak Capacity Project is under way, with the first phase completing in April 2022, added 900,000 teu of annual container yard capacity to Garden City Terminal, while a further 300,000 teu was expected by July.

Expansion projects are a necessary undertaking for Savannah, which has experienced severe congestion over the past year.

High demand and inland distribution led to a backlog of ships, with Savannah being the most congested port on the east coast in September 2021.

At the time, Hapag-Lloyd warned that ships at Savannah were delayed by up to seven or eight days.

Port authority: Georgia Ports Authority, P.O. Box 2406, Savannah, GA 31402

Website: www.gaports.com

Email: csv@gaports.com

Terminals (Operators):

Garden City Terminal (Georgia Ports Authority)
Ocean Terminal (Georgia Ports Authority)

2

Throughput 2021: **5,604,478 teu**, **3.2%** (2020: 5,428,307 teu)

31 Valencia (Spain)

Expansion is needed as the second-largest Mediterranean port nears capacity

VALENCIA saw a large surge in cargo during the first half of 2021, with volumes rising by close to 12% during the first six months.

This tailed off again in the second half, but the port's terminals still recorded a respectable 3.2% increase in throughput to reach more than 5.6m teu during the full year.

This was enough to nudge Valencia, already Spain's largest container port, into fourth place in the European rankings and



Valencia: success has come at a price.

APM Terminals

take the number two slot from Piraeus in the Mediterranean

Basin, coming second only to rapidly growing Tanger Med.



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Situated on Spain's southeastern coastline, Valencia has found a niche for itself not only as Spain's major import location, but increasingly as a transshipment hub for vessels en route to Northern Europe.

Yet success has come at a price.

Port Authority of Valencia president Aurelio Martínez said the slowdown in the second half of 2021 indicated that Valencia was reaching the point of saturation.

"We are close to our maximum capacity of 7.5m teu and, when there is a lot of operational cargo,

these limitations are already noticeable," he said. "That is why the new northern container terminal is essential if we want to continue to be a port of reference in world traffic."

The plan for a new container terminal passed another hurdle after receiving a favourable report from Puertos del Estado, the government-owned company responsible for the management of Spain's state-owned ports.

The new terminal will involve an investment of close to €1.4bn (\$1.5bn), with around one-third coming from public financing and the remainder from private investment.

It will have a capacity of 5m teu per year.

In 2019, Mediterranean Shipping Co, which already has a terminal at the port, submitted a bid for the new terminal through its Terminal Investment Ltd subsidiary.

The new facility is expected to enter service after 2024.

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)

➔ 10

Throughput 2021: 5,385,289 teu, ➔ 22.1% (2020: 4,411,799 teu)

32 Cai Mep (Vietnam)

A new international terminal is expected to catapult the South Vietnamese port to a further strategic position

A STAGGERING 22% increase in annual throughput is potentially a sign of things to come for Vietnam's Cai Mep port, which saw a new terminal open in 2021.

Cai Mep's largest terminal, the Saigon Newport-operated Tan Cang-Cai Mep International Terminal (TCIT), handled more than 2m teu for the second consecutive year.

It remained the second-biggest terminal in the country, with new calls, particularly from Wan Hai Lines vessels, operating in the wider region.

The APM Terminals-operated Cai Mep International Terminal (CMIT) also recruited new services to its roster, having added a Cosco and OOCL service as well as a 2M Alliance and ZIM service in 2021, both of which link Vietnam with the US.

It also served the largest



Cai Mep: CMIT added services by Cosco, OOCL, 2M Alliance and ZIM in 2021.

Cai Mep International Terminal (CMIT)

containership to ever call at a Vietnamese port, the 20,119 teu *Cosco Shipping Aquarius*.

The single biggest driver for Cai Mep's considerable throughput increase in 2021 was the launch of the new Gemalink deepsea terminal, a 75%:25% venture between Gemadept and CMA CGM, respectively, that handled almost 800,000 teu in its first year of operation.

Still in its first phase, the terminal has a capacity of 1.5m

teu, which will grow to 2.4m teu when the second and final phase is completed by the end of 2023.

Operations in 2021 were backed by an 800 m berth, with six ship-to-shore cranes and 18 rubber-tyred gantry cranes by the end of the year.

It has added six more RTG cranes and two more STS cranes in 2022.

Gemadept said it hopes the terminal can handle 1.4m teu in 2022.

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)

Gemalink (Gemadept)

5

Throughput 2021: **5,311,810 teu**, **↓ 2.3%** (2020: 5,437,477 teu)

33 Piraeus (Greece)

Volume decreases at the port's biggest terminals drive down total traffic for a second year in a row

GREECE'S largest port experienced a second consecutive year of throughput decline as the Covid pandemic, port congestion and blank sailings persisted.

The overall 2.3% decrease in box traffic was driven by a 4.1% drop in throughput at Cosco Shipping Ports' Pier II and Pier III, which stood at just under 4.7m teu at the end of 2021.

The two terminals have a total combined handling capacity of more than 7.2m teu.

This drop offset the 13.9% teu increase in the smaller Pier I, run by Piraeus Port Authority, which handled 615,510 teu.

Similarly to 2020's increase, the terminal's growth in 2021 was driven by a rise in transshipment volumes.

The PPA also added five stacking cranes in 2021, plus a new super-post-panamax crane that will allow it to handle 20,000 teu vessels.

While 2021 marked the



Piraeus: Cosco Shipping Ports has been clear in its ambition to hit 10m teu.

Lucia Gajdosikova / Stockimo / Alamy Stock Photo

second year of throughput reduction for Piraeus, Cosco Shipping Ports has been clear in its ambition to hit 10m teu for the eastern gateway to the European Union, which remains among the five biggest ports in Europe.

In the autumn of 2021, Cosco Shipping Ports officially acquired another 16% of the port from the Greek government for €88m (\$89.3m) to raise its total ownership

stake to 67% since the highly publicised privatisation of 2016.

It also secured a concession from the government for a five-year extension to fulfill its €294m investment commitment into the port.

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)

7

Throughput 2021: **5,207,000 teu**, **↓ 7.8%** (2020: 5,650,000 teu)

34 Yingkou (China)

Powerful network of China Merchants is still unable to protect the port from the coronavirus fallout

IT seems that the benefits of being brought under China Merchants Group could not offset the impact of coronavirus on Yingkou port in 2021.

Throughput plunged by 7.8% year on year to 5.2m teu after it

had just recovered from another slump in 2020. Yingkou Port Liability Co, part of Yingkou Port Group, was officially consolidated by its neighbouring rival, Dalian Port Co, which was renamed as Liaoning Port Co.

Yingkou Port Group, the main operator of the largest port in China's Liaoning province, was then controlled by China Merchants Group, after an agreement signed between the state conglomerate and

the provincial authority to consolidate the local port industry.

However, the powerful network of China Merchants was still unable to pull Yingkou through the coronavirus fallout.

In May 2021, Yingkou immediately strengthened its grip over coronavirus-control measures after positive cases were confirmed in the Bayuquan port area.

The efficiency of trucking services was greatly hampered as neighbouring cities raised vigilance against Yingkou.

Lloyd's List Intelligence data showed vessel waiting times were at a record high in October 2021 and congestion has been particularly acute in northern China, thanks to pandemic-related quarantine and immigration restrictions.

The weak trade conditions from the year before were also compounding the loss of 443,000 teu off Dalian's tally.

Though pandemic fallout took a significant chunk of the port's attention, Yingkou still



Yingkou: struggled to seek development opportunities.

Cosco Shipping Ports

struggled to seek development opportunities.

Together with Dalian port and Dandong port, Yingkou signed strategic co-operation agreements with Shandong Port Group in order to optimise container routes, develop feeder route services and share resources.

However, the recurring Covid outbreaks shattered its attempts again in 2022.

Even stricter lockdowns, which lasted for two months, were implemented in March 2022, which made local

authorities further tighten the restrictions on movements. The capacity of trucking services in the city was hampered as the majority of truck drivers were in quarantine.

The box volume for the first five months of 2022 has dropped by a further 23.9%.

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

Terminals (Operators): Yingkou Container Terminal (Liaoning Port Group)

1

Throughput 2021: **5,174,220 teu**, **↑ 6.5%** (2020: 4,860,000 teu)

35 Rizhao (China)

Shandong province port continues to expand its domestic and international services, adding 13 new routes

AS an important port on the coast of the industrialised Shandong province, Rizhao port maintained its growth momentum during 2021.

It further increased its container throughput by 6.5%, making it one of the major ports with an annual throughput of more than 5m teu.

In the process, Rizhao unveiled its so-called "side-loading and parallel layout fully

automated container terminal", which was a general cargo terminal in the past.

The terminal uses a process of shore layout side-loading and unloading technology, plus driverless truck horizontal transportation, which could reduce the comprehensive terminal costs by 70%.

It could also reduce the total energy consumption of a single container by 50% during loading and unloading.

Rizhao continues to expand its domestic and international services, adding 13 new routes in 2021.

In March 2021, it extended its reach to UK and Belgium.

In September 2021, Rizhao developed the container route between its two major port areas, Shijiu and Lanshan.

It also strengthened its co-operation with Ningbo port. The 'Rizhao-Qingdao-Ningbo' container shipping route has

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Rizhao: fully automated container terminal could reduce the comprehensive terminal costs by 70%.

been available since June 2021. Separately, Rizhao’s Lanshan port area co-operated with Maersk to provide direct shipping services to timber and logging companies, avoiding the trouble of transshipment to other ports.

Rizhao also continues to invest in its future infrastructure, promoting the

smart port construction.

In late December 2021, Rizhao introduced a fully automated containerised system at its terminals, improving operational efficiency by 30% and saving as much as 50% of labour costs.

One of the largest facilities for coke fuel exports in China, the port was once restricted in

its ability to containerise the fuel, due to the dust pollution and safety issues.

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)

1

Throughput 2021: **5,090,000 teu**, **6%** (2020: 4,800,000 teu)

36 Lianyungang (China)

The largest seaport in China’s Jiangsu province has been actively exploring new shipping routes

AFTER three years of stagnation, Lianyungang finally achieved a substantial increase in container throughput in 2021, despite the coronavirus fallout.

Lianyungang has seen success with a 6% year-on-year increase in container throughput in 2021, while total throughput has passed the 5m teu benchmark.

The largest seaport in China’s Jiangsu province, which once suffered from its limited ability to develop deepsea routes, Lianyungang has been actively exploring new shipping routes in the past year.

It added nine new container

routes and upgraded its long-haul services. Lianyungang

extended its reach from the west coast of the US to the



Lianyungang: once suffered from its limited ability to develop deepsea routes.

east coast. Now products can be shipped between all three regions.

The transshipment port for the Yangtze Delta Region, Lianyungang has moved further to expand its sea-rail services as part of the efforts to boost its cargo volume.

Lianyungang port built six new sea-rail channels in 2021.

However, the robust growth of shipping volume, which was expected to carry over into 2022, was greatly hampered by the resurgence

of Covid infections in the city. It immediately put stringent Covid-control measures in place, including partial lockdowns, after around 300 positive cases were confirmed in March 2022.

For the first four months of 2022, Lianyungang's box throughput only edged up 0.9% year on year to 1.65m teu, according to the local statistics bureau.

At the same time, Shanghai International Port Group announced it was to take a 23.1% stake in Lianyungang

Port Group to become its second-largest shareholder, according to a stock exchange filing.

The proceeds would be used to build an automobile logistics centre and developing a green port in Lianyungang.

Port authority: Lianyungang Port Authority, Shipping Centre, 209 Haitang North 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)



Throughput 2021: **5,018,900 teu**, **↑ 5.3%** (2020: 4,767,000 teu)

37 Bremen / Bremerhaven

(Germany)

Volumes at the twin German ports are back over the 5m teu mark, but still well short of 2010's level, prior to Hapag-Lloyd's switch to Hamburg

BREMENPORTS saw a worthwhile throughput gain of 5.3% in 2021, taking the overall figure back above the 5m teu mark.

However, that is still rather short of the 5.5m teu-6.1m teu range typical of the 2010s, before Hapag-Lloyd's 2019 decision to switch US services to nearby Hamburg, in a move that cost the ports nearly 600,000 boxes a year.

It also remains to be seen whether that performance will be maintained in 2022, which has been marked by industrial action by the labour force, with accompanying reports of congestion.

The ports are owned by Bremen, and the city-state's senator for ports, Dr Claudia Schilling, expressed satisfaction with 2021's efforts.

"The ports of Bremen remained fully functioning during the second year of the pandemic, and despite the



Bremen / Bremerhaven: 2022 has been marked by industrial action and reports of congestion.

Oliver Förstner / Alamy Stock Photo

resulting difficult health and hygiene regulations," she said.

"The port employees, the ships' crews and the port and logistics industry succeeded in upholding supplies to the German and European economies, even during these difficult times.

"And despite coronavirus, we can actually report an

improvement in throughput figures for the ports of Bremen."

Port authority: Bremenports GmbH & Co. KG, Am Strom 2, 27568 Bremerhaven, Germany

Website: www.bremenports.de

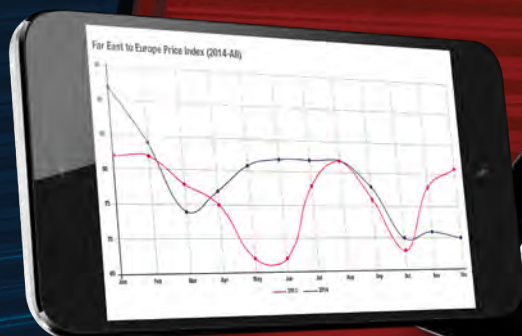
Email: office@bremenports.de

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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South East Asia to West Med & North Africa - Tier 4 - 2014 December (All)
All Dry Reefer

| Region | Aggr | Current Month | France MED | Germany West | Spain MED | Tonnes | Other West Med & North Africa | Total |
|-------------------------------|------|---------------|------------|--------------|-----------|--------|-------------------------------|-------|
| South East Asia | 775 | 0 | 0 | 0 | 0 | 0 | 0 | 775 |
| Korea | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Japan | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Philippines | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Singapore | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Thailand | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Malaysia | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| South East Asia Total | 775 | 0 | 0 | 0 | 0 | 0 | 0 | 775 |
| 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 |
| Tonnes | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Other West Med & North Africa | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Total | 775 | 0 | 0 | 0 | 0 | 0 | 0 | 775 |

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7 3

Throughput 2021: **4,976,014 teu**, **7 12%** (2020: 4,442,921 teu)

38 Manila (Philippines)

Volumes mostly recover from Covid, while ICTSI builds a new berth and installs 5G tech at its international terminal

MANILA, the home of multinational International Container Terminal Shipping Inc, saw volumes recover as it touted upgrades in 2021.

Throughput rose 12%, making up for much of the 16.4% fall the year before, when Covid hit.

ICTSI runs the flagship Manila International Container Terminal, the largest in the country, and continues to expand capacity there.

It is developing a new berth to handle increasing demand and serve containerships up to 18,000 teu. It will add 400 m of quay and up to 12 ha of yard area in phases.

Water will be dredged to a 13.5 m depth, with potential for another 15 m. The full build will give MICT a total berth length of 2,300 m and expand berthing capacities and total capacities by 21% and 25%, respectively.

“Berth 8 will be a game-changer for the city. It will take Manila’s port capabilities to a whole new level,” said ICTSI executive vice-president Christian Gonzalez.

ICTSI expanded Berth 7 by another 150 m in 2021, creating



Manila: berth 8 will be a game-changer for the city.

ICTSI

a 600 m contiguous berth. A sixth quay crane is due for delivery in July 2023, alongside two other quay cranes for Berth 4.

It is modernising the first five berths, including additional reefer racks to house about 300 teu of reefer cargo.

MICT took delivery of eight new Mitsui hybrid rubber-tyred gantry cranes in March 2022, bringing its fleet to 52 units, including 40 hybrids powered by a battery and smaller diesel engine.

In 2021, ICTSI partnered with PDLT, the Philippines’ biggest telecoms company, to roll out 5G. It has invested \$20m in IT for the terminal in the past 10 years.

The technology is being used to weigh containers automatically,

using spreader load cells in RTGs. This helps shorten the truck drivers’ stay at the port, since they no longer need to queue to use terminal weigh bridges.

Other 5G plans include truck driver messaging, remote safety monitoring and remote crane monitoring, using Internet of Things devices and sensors.

ICTSI says use of its online payment system jumped from 30% to 100% during the pandemic, and adds that other remote technologies helped keep it running during lockdowns.

Manila is also home to Manila North Harbour terminal, operated by its namesake, Manila North Harbour Port, in which ICTSI has a 50% stake.

Another terminal at Manila’s south harbour is operated by Asian Terminals.

Port authority: Philippine Ports Authority, Bonifacio Drive, South Harbour Port Area, Manila, 1018 Philippines

Website: www.ppa.com.ph

Email: helpdesk@ppa.com.ph

Terminals (Operators):

Manila International Container Terminal (ICTSI)
Manila South Harbour (Asian Terminals, Inc)
Manila North Harbour (Manila North Harbour Port, Inc)

7 1

Throughput 2021: **4,915,975 teu**, **7 10.3%** (2020: 4,454,902 teu)

39 Colón (Panama)

Central and South America’s biggest port keeps that title, with strong transshipment activity

PANAMA’S Colón saw throughput rise 10.3% in 2021 to defend its position as the biggest container port in Central and South America, ahead of Santos, Brazil.

Colón continued to see growth in transshipment cargoes, helped by its position on the Atlantic side of the Panama Canal.

The port includes the

Manzanillo International Terminal, Cristobal, and Evergreen’s Colon Container Terminal.

Throughput at MIT was up 5.6% to 2.8m teu as the Panamanian

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Lloyd's List Intelligence 

local market saw a significant recovery in 2021, with 15% more containers moved.

Transhipments at the terminal increased by 3%, where main trade flows remained from South America-US west coast to US east coast and Europe.

MIT's share of transhipment moves was 89%, the company said.

MIT bought two nPx cranes, estimated to be in operation by the fourth quarter of 2022, as well as eight top picks to replace its old fleet.

The terminal also worked on preventive maintenance of all its quay dock pylons.

It finished a two-year crane-raising project in June 2022, achieving minimum height clearance of 47 m on Berth 5 and 51 m on Berth 8.



Colón: Manzanillo International Terminal is the biggest facility at the port.

MIT

At CCT, new service calls from Mediterranean Shipping Co saw throughput soar by 47.5% to 1.05m teu, while Hutchison's Cristobal terminal posted a 2.6% fall to 1.04m.

In May 2022, Notarc Management Group and Mediterranean Shipping Co agreed to reactivate construction of a container terminal on Margarita Island in the province of Colón.

Investment at the time was 16.6% complete, with

construction expected to resume during the fourth quarter of 2022.

The port would then have capacity for 5m teu and generate about 1,000 direct jobs, according to the Panama Maritime Authority.

Port authority: Panama Maritime Authority

Website: www.amp.gob.pa

Email: info@amp.gob.pa

Terminals (Operators):

Manzanillo International Terminal (SSA Marine)

Colón Container Terminal (Evergreen)

Cristobal (Hutchison/Panama Ports Co)

3

Throughput 2021: **4,882,342 teu**, **3.1%** (2020: 4,737,313 teu)

40 Jeddah (Saudi Arabia)

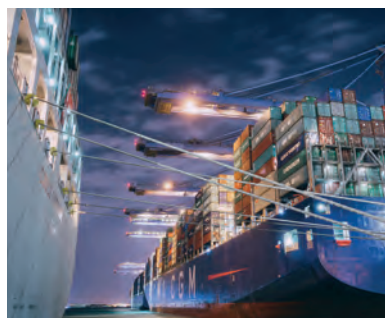
Throughput nudges up at Saudi hub, as Red Sea Gateway Terminal thrives on chaos

THROUGHPUT at Saudi Arabia's biggest container facility in 2021 climbed by just over 3%.

The almost 4.9m teu result, however, sees Jeddah Islamic Port fall three places in the Lloyd's List Top 100 Ports rankings, but still above Egypt's Port Said to hold onto its crown as the second-biggest Middle Eastern port behind Dubai.

There has been plenty of activity at Jeddah's Red Sea Gateway Terminal, which wants to expand to 5.2m teu by 2023 and 9m teu by 2030, at a cost of \$1.7bn.

In 2021, Lloyd's List called RSGT one of the few terminals in the world not suffering from the congestion and slowdowns that have bedevilled ports during the past year.



Jeddah: Red Sea Gateway Terminal wants to expand to 5.2m teu by 2023.

RSGT

It put its success down to being "somewhere between lucky and prepared", having expanded capacity before the crisis hit. A slowdown in Saudi import/export volumes also helped.

Transhipments made up 60% of volumes, and RSGT has

done well from supply chain chaos, which creates more transhipments between mother vessels going to Europe.

In 2021, the consortium that owns RSGT divested two 20% stakes to China's Cosco Shipping Ports and Saudi Arabia's Public Investment Fund, for a total of \$280m.

Meanwhile, the Saudi Ports Authority (Mawani) and DP World have started work expanding the latter's South Container Terminal at Jeddah, to double its capacity to 4m teu.

Upgrades will include deepening the draught to 18 m to service containerships of up to 26,000 teu, and lengthening the quay from 1,500 m to 2,150 m. And in June 2022, DP World

signed a 30-year agreement to build a Riyal500m (\$133.3m) logistics park at Jeddah.

The deal will set up a facility spanning more than 415,000 sq m, with an inland container depot capacity of about 250,000 teu and 100,000

sq m of warehouse space. It is expected to boost Jeddah's re-export activities, cutting time and costs for importers and exporters.

DP World is adding 15 ship-to-shore gantry cranes and 60 electric rubber-

tyred gantry cranes in 2022.

Port authority: Jeddah Islamic Port, PO Box 9285, Jeddah 21188, Saudi Arabia
Website: www.mawani.gov.sa
Email: mawanicare@mawani.gov.sa
Terminals (Operators):
 Red Sea Gateway Terminal (RSGT)
 Jeddah South Container Terminal (DP World)

↗ 4

Throughput 2021: **4,831,972 teu**, ↗ **14.2%** (2020: 4,232,046 teu)

41 Santos (Brazil)

The second-largest container port in Latin America achieves a record throughput level

BRAZIL'S largest container port at Santos registered significant growth in its box throughput during 2021 and handled a record 4.8m teu, in comparison to 2020's 4.2m teu.

This represented an increase of 14.2%, provided by a total of 1,863 containership calls — which was a 3.6% reduction on the 1,933 boxship calls registered during 2020.

The largest vessels to call at Santos was Hamburg Süd's 10,600 teu capacity *San Artemissio*.

The jump in throughput last year saw Santos climb four places to move just outside the top 40-ranked global container ports.

The largest terminal at the port, Tecon Santos, increased

its throughput to 1.14m teu, an increase of 22.7% versus 2020.

Santos has three other container terminals, comprising the APM Terminals-operated Brasil Terminal Porturtario (BTP), the DP World-operated Embraport and the Tecondi Terminal, operated by Ecoporto Santos.

Major container operators to use Santos include Maersk Line and Hamburg Süd's, Hapag-Lloyd, Log-In Logistica, Pacific International Lines, Evergreen and MSC. The Port Authority of Santos is expected to be privatised in late 2022 and in future will be operated under a 35-year concession model as part of the Brazilian government's plans to privatise its ports.

Ahead of privatisation, Brazil's

Ministry of Infrastructure has approved a major expansion of the port boundaries, which is expected to double the land area of the Port of Santos.

The existing land area is already almost fully occupied and operating at its capacity limits.

In 2021, the Port Authority of Santos saw its net income increase by more than 62%, to \$67m, in comparison to 2020.

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 Porturtario (Terminal Investment Ltd and APM Terminals)

↘ 9

Throughput 2021: **4,799,497 teu**, ↘ **6%** (2020: 5,107,873 teu)

42 Algeciras (Spain)

Volumes at the Spanish port fall as congestion and rivals take their toll

VOLUMES at Algeciras took a knock in 2021 as the impact of congestion and supply chain disruptions saw its throughput slip back 6% to 4.8m teu.

The port's two container

terminals had held up during the first year of the pandemic, losing only a fraction of their volumes, but by 2021, congestion and stiff competition from its nearest rival took its toll.

While Tanger Med — just across the Strait of Gibraltar — saw volumes shoot up, Algeciras fell as transshipment volumes, which drive its throughput, sank back.

Transshipment volumes dropped

by 8.6% to 3.5m teu as new facilities at Tanger Med took up volumes.

Yet even import containers fell as its slightly larger rival, Valencia, took more of Spain's import cargo.

The port's terminals can both handle the largest boxships and in 2021, they received a maiden call by the 24,000 teu *HMM Algeciras*, named after the port city.

HMM has a base at Algeciras through its Total Terminals International Algeciras terminal, which it acquired following the collapse of its original owner, Hanjin Shipping.

HMM achieved its goal of injecting more liquidity into the facility in 2021, when it sold a stake of 50% minus one share to french carrier CMA CGM's



Algeciras: transhipment volumes, which drive its throughput, sank back..

APM Terminals

terminal-operating division.

Expansion work continued in 2021 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. The Maersk-owned facility — which has had its concession at the port extended until 2032 — received 12 new gantry cranes in 2021.

It put these into commission early in 2022 to replace older equipment, as part of an ongoing plan to improve the facility.

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: scomercial@apba.es

Terminals (Operators):

APM Terminals Algeciras (APMT)

Total Terminals International Algeciras (HMM/CMA CGM)

➔ 3

Throughput 2021: **4,764,583 teu**, **➔ 18.8%** (2020: 4,009,672 teu)

43 Port Said (Egypt)

In spite of the pandemic and the grounding of Ever Given, the Egyptian port sees a leap in throughput; improved access to Cairo is likely to see it grow further

YET another stellar performance came from Port Said, which posted an increase of almost 19% in throughput for 2021 over 2020.

The improvement led to a rise up the Lloyd's List rankings from 46th position to 43rd.

The port lies at the northern end of the Suez Canal and is developing as a transhipment port for the eastern Mediterranean.

It has two terminals: Suez Canal Container Terminal — a joint venture, with APM Terminals as the majority shareholder alongside Cosco, Suez Canal Authority and the National Bank of Egypt — and Port Said Container Terminal, operated by Port Said Container & Cargo Handling.

SCCT's vision is to be the largest hub in the Mediterranean and the leading gateway to Egypt, one of

Africa's most resilient economies. A series of investments initiated in 2020 with the support of the government of Egypt and the Suez Canal Economic Zone, aimed at equipment and capacity upgrades, enabled Port Said to maintain throughput growth in spite of the pandemic challenges.

These included the upgrading of SCCT's ship-to-shore cranes, with 12 of these able to handle ultra large container vessels, and an increase in gate-handling capacity to more than 50,000 teu/month.

Other investments at SCCT included the purchase of new yard equipment, with 16 new rubber-tired gantry cranes joining the fleet, paving the way for more quay and gate volumes in the future.

As part of a national

infrastructure plan, a series of tunnels under the Suez Canal was completed in 2019 to provide east-west links, and access to the large Cairo metropolitan area, home to more than two-thirds of Egypt's gross national product.

Port Said's annual growth was interrupted, but not damaged, by the grounding of the containership *Ever Given* in March 2021; even Suez Canal revenues posted improved figures for half-year 2021 compared with a year earlier.

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)

44 Qinzhou (China)

A double-digit growth rate is maintained for the fifth consecutive year, with the port having more than doubled throughput a year earlier

QINZHOU port continued its meteoric growth rate in 2021, with a 17.2% rise in throughput catapulting it well into the 4m teu band, after finishing the previous year just on the cusp of it.

The port has maintained a double-digit growth rate for five consecutive years, having more than doubled throughput just the previous year to rocket itself into the 3m teu league.

After the consolidation of the port's operators into a group by Beibu Gulf Port Group, with PSA International and Cosco Shipping Ports, business has especially been on a tear and Qinzhou has now become an important port in its own right, with a clear strategy for future growth.

At the heart of this is Qinzhou's designated role as the main port of the International Land-Sea Trade Corridor (ILSTC), China's new western land-sea channel.

This has been combined with an acute realisation of the importance of intermodal connections and the potential of the Regional Comprehensive Economic Partnership (RCEP) trade deal, which just came into force in 2022.

It links the 10 Asean nations and five key trade partners, including China. Qinzhou now has 28 routes to RCEP ports.

In just 15 years, the number of sea-rail intermodal trains on the western land-sea channel alone increased more than 30-fold, from 178 to more than 6,000 in 2021, making it the fastest-growing international train route in China.

This trend is set to continue, with China National Railway



Qinzhou: designated role as the main port of the International Land-Sea Trade Corridor.

Xinhua / Alamy Stock Photo

reporting a 38% increase in throughput on this route from January to May 2022, to 310,000 teu.

The port has been pushing hard to keep its capabilities in line with this growth.

The project to upgrade and automate berths 7-10 and fully integrate them with the railway network has been completed, while water depth in the main approach channel has been increased to be able to take in megaboxships, with capacity boosted to more than 1m teu.

Efficiency has been increased progressively as well and, during 2021, a record daily throughput of 17,000 teu was set.

New routes continue to be opened up, including new connections to the interior, linking the United Arab Emirates to Lanzhou and Southeast Asia to Xian, among others.

Qinzhou now has 45 sea-rail intermodal lines reaching key inland markets, while the

network also connects to the main China-Europe line.

In 2021, the port added 12 new routes to its current network of 64 routes, including 37 foreign trade routes. These provide full coverage of Northeast Asia, Asean and major China coastal ports.

The phenomenal growth of Qinzhou over the past couple of years has been as much due to national policy as conducive conditions.

Fresh from breaking new records, the port is now already aiming for the stars, with a target to more than double throughput to 10m teu and intermodal trains to 12,000 by 2025.

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.qzgw.com

Email: bbwgqzmt@163.com

Terminals (Operators):
Beibu Gulf Port Qinzhou Terminal

2

Throughput 2021: **4,510,000 teu**, **↑ 3.9%** (2020: 4,340,000 teu)

45 Salalah (Oman)

Record-breaking year is seen at the port regarded as vital for Oman's economic diversification efforts

SALALAH — which serves as the regional hub for the 2M alliance of Maersk and MSC — had a record-breaking 2021, with container throughput increasing by just under 4% to hit 4.5m teu for the first time.

More than 90% of that figure is accounted for by transshipment.

The feeling is that with volumes rising so strongly, the port is pretty much operating at full pelt, and expansion will be needed.

Equipment purchases have been mooted, with ship-to-shore

cranes number one item on the shopping list, and a possible berth expansion is in the offing in the medium to long term.

Ultimately, capacity could rise to around 6m teu.

Salalah port services chair Braik Musallam Al Amri said: "Container demand growth is losing some momentum amid mounting headwinds, but carriers will continue to rake in high profits.

"Management feels that the bulk of risk from the highly unpredictable container market will reside with shippers in

2022, which is shaping up to be another year of severe disruption, undersupply and extreme cost."

Regarded as vital to Oman's economic diversification efforts, known as Oman 2040 Vision, the port also benefits from strong support from the country's government.

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

Terminals (Operators): APM Terminal Salalah (APMT)

1

Throughput 2021: **4,325,956 teu**, **↑ 1.6%** (2020: 4,259,755 teu)

46 Tokyo (Japan)

At the Japanese city's port, pandemic emergency measures restrict growth, while investment remains low

TOKYO reported a slight increase in throughput for 2021, with preliminary figures reaching 4.32m teu.

The 2020 actual total, of 4.26m, slipped by 2,000 teu from the year's preliminary figure — and the final tally for 2021 is expected to be in line with this.

Export containers fell a little short of the previous year but import containers rose to 103.6% of the 2020 figure, giving an overall rate of 101.6%.

Regarding infrastructural investments, there has been no change since 2020, with work on the Y3 Terminal planned to start in the near future at Outer Central Breakwater.

Tokyo welcomed one new liner service during the year: PS5 (Hapag-Lloyd/Yang Ming/ONE/HMM) and saw the closure of one service: HBB/ACC2/CPS, an alliance of CMA CGM, Cosco and Evergreen.

Tokyo Port lies at the heart of Japan's largest conurbation. The metropolitan area now stands at 37.34 million people — experiencing a small but steady decline since the peak size of 37.46 million in 2018.

By comparison, the second-largest city, Osaka, numbers 19 million, followed by Nagoya with nine million.

The country's economic growth in 2021 was sluggish, with real GDP rising by 1.7%

amid a year of volatility.

The pandemic lay behind economic contractions in the first and third quarters of the year, although there was a strong rebound in the fourth quarter.

As the Covid state of emergency ended in September 2021, pent-up consumer demand took over. Household spending grew by 2.7% in the final quarter of the year.

Spending on durable goods, semi-durable goods and services were notably strong. Exports also supported growth, rising by 1.6% as the year drew to a close, although imports fell slightly in real terms.

The impact of the pandemic on investment — in the port, the city, and the country more

generally — remained weak. Despite growing modestly during the fourth quarter of

2021, business investment remained more than 10% below pre-pandemic levels.



Tokyo: revival for the port started in the fourth quarter of 2021.

dpa picture alliance / 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 (UTOC; 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)

1

Throughput 2021: **3,901,215 teu**, **↑ 8.3%** (2020: 3,602,233 teu)

47 Tanjung Perak (Surabaya) (Indonesia)

Increasing trade and shipment help boost throughput as the economy recovers from the pandemic

TANJUNG Perak port handled 3.9m teu of containers in 2021, up 8.3% year on year, on increasing trade and shipment as the economy recovered from the pandemic.

The port, located in Surabaya in East Java, is the second-busiest port in Indonesia and the hub for domestic trade in the eastern part of the country.

In 2021, the port came under the purview of the centralised Pelindo in Jakarta, following the consolidation of the different regional Pelindo subsidiary companies. Previously it had been under the authority of Pelindo III.

A significant project completed in 2021 was the construction of a

bridge flyover to Teluk Lamong Terminal. The 2.4 km bridge aims to reduce congestion on the existing road access to the terminal.

Other port enhancements were also under way. In September 2021, the port awarded a contract to another state-owned enterprise, Pembangunan Perumahan, for the development of the wharf structure at the Berlian Terminal.

The work was 86% complete by December 31, 2021.

The port is also adopting digitalisation with the launch of its two web-based applications.

The first one, SIRITA, provides

information on the port facilities, including tariffs and planned projects to be undertaken on site.

The second application is an electronic system to inform the public on any progress or delays on the infrastructure development at the port.

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

Website: www.pelindo.co.id

Email: info@pelindo.co.id

Terminals (Operators):

Terminal Petikemas Surabaya (Pelindo)

Mirah Terminal (Pelindo)

Nilam Terminal (Pelindo)

Jamrud Terminal (Pelindo)

Berlian Terminal (Pelindo)

Kalimas Terminal (Pelindo)

Teluk Lamong Terminal (Pelindo)

7 5

Throughput 2021: **3,736,206 teu**, **7 12.5%** (2020: 3,320,379 teu)

48 Seattle / Tacoma (United States)

Liners adding services to the NWSA ports to avoid congestion off California give a boost to throughput levels

THE Northwest Seaport Alliance, which manages container terminals in Seattle and Tacoma, has gained from California's port congestion, with throughput rising by 12.5% in 2021 compared to 2020.

As the southern west coast became overwhelmed by the US buying spree that brought a wave of containers to the country, the NWSA positioned itself as a solution to relieving the congestion at these gateways.

Throughput volumes trended upwards for most of 2021, with a particularly strong March and April, with 330,175 teu and 301,074 teu handled, respectively, in those months.

By this time, four new service callings had been added to the NWSA ports.

MSC *Nerissa* suspended its call to Los Angeles to add Tacoma's Husky Terminal to its rotation. The service has a Yantian-Shanghai-Tacoma-Yantian rotation.

"The Tacoma Harbour has welcomed many extra-loader MSC vessels over the past few



Seattle / Tacoma: diverted cargoes from logjammed ports on the west coast have driven up the NWSA's imports.

Northwest Seaport Alliance

months, providing relief from congestion at other ports and further showing that our gateway has the capacity to meet growing demand now and in the future," said NWSA's co-chair and port of Tacoma commission president Dick Marzano.

Wan Hai Lines, Zim and CMA CGM all launched new services that utilise the NWSA ports as a faster alternative to other, more

backlogged, west coast ports. The Husky Terminal has been upgraded in recent years, with the port of Tacoma spending \$250m to strengthen and realign the berth and add eight super-post-panamax cranes.

Another project is under way to expand international cargo in the Seattle harbour. Construction of Terminal 5 began in July 2019.

Phase one was completed as of January 2022, with new berth and terminal capacity and expanded capabilities to handle very large boxships.

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 Sitcum Terminal (SSA Terminals)

7 2

Throughput 2021: **3,700,000 teu**, **7 5.7%** (2020: 3,500,000 teu)

49 Felixstowe (United Kingdom)

Britain's largest container port is focusing on dredging projects and investment in new equipment after a difficult couple of years

FELIXSTOWE was operating within normal parameters again by mid-2022 after a challenging couple of years for the UK's largest container port as it grappled with unprecedented congestion caused by disrupted

sailing schedules and a surge in imports during the pandemic.

This was compounded by a shortage of dockworkers and truck drivers.

Both carriers and shippers vented their anger as vessels

waited at anchor or were diverted to other ports, while the container parks were so full that they became effectively gridlocked, adding to the delays.

Whereas 70% is regarded as the maximum density for



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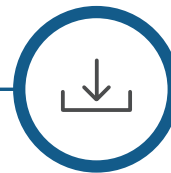
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an efficiently run storage yard, Felixstowe's yards were 90% full at times.

Initially, massive stocks of personal protective equipment and other medical supplies were overwhelming the port, along with cargo generated by the unexpected boom in consumer spending.

Then came the road freight crisis and lack of warehousing space that backed up containers right along the the supply chain.

Even though some ships were skipping Felixstowe at the height of the crisis, the port still saw volume growth in 2021 after an estimated decline in 2020 of almost 10% as trade collapsed worldwide in the early days of the Covid outbreak.

Throughput recovered nearly 6% to 3.7m teu, helped by the fact that although there may have been fewer ship calls, larger vessels were handled.

For example, the 2M alliance of Maersk and Mediterranean Shipping Co combined one of their loops but deployed bigger tonnage.

And in May 2022, Felixstowe achieved what it believes was a European record by handling 27,961 teu in a single call on the 23,600 teu *MSC Amelia*.

The increase in container traffic lifted Felixstowe two places in the 2021 rankings to number 49.

At the same time, yard density was down to a very manageable 50% or so.

The focus now is on infrastructure investments, with the channel being dredged to a depth of 16 m from 14.5 m, and some berths deepened from 16 m to 18 m. This will give the largest ships a longer tidal window.

Felixstowe is also a partner in the Freeport East consortium, one of eight new tax-free sites in

England, with work on the first phase starting in mid-2022.

Part of Hong Kong's huge Hutchison Ports group, Felixstowe is also investing in electric-powered tractors and remote-controlled/automated yard cranes, as well as participating in 5G technology trials.

Chris Lewis, who came out of retirement to become chief executive of Hutchison Ports UK in late 2020 as the disruption worsened, stepped down at the end of 2021.

Clemence Cheng, managing director of Hutchison Ports Europe, took on the role that Mr Lewis had held.

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)
Berths 8&9 (Hutchison Ports UK)

— NO CHANGE

Throughput 2021: **3,678,952 teu**, **↑ 6.1%** (2020: 3,467,521 teu)

50 Vancouver (Canada)

Continued growth in throughput increases calls for the Roberts Bank Terminal 2 project to be brought onstream before the end of the decade

VANCOUVER Fraser Port Authority recorded its fifth year of container throughput growth in 2021.

Canada's west coast has seen growth average 5% a year for the past decade.

In 2021, expansion was again in line with the upper range of forecasts. Import quantities increased 4% to 1.9m teu, while export quantities increased 9% to 1.8m teu.

The continued increase came in spite of the pandemic and global supply chain challenges, as well as extreme weather events in British Columbia.

Even so, Robin Silvester, port authority president and chief



Vancouver: Canada's west coast terminals are expected to run out of capacity within five years. *Global Container Terminals*

executive, warned of dark clouds on the horizon in the shape of a container capacity shortage and a land shortage.

He said if throughput continues to grow, west coast container terminals are expected to run out of capacity "by the mid to

late-2020s". To meet increased demand for containers, the port authority has been leading the Roberts Bank Terminal 2 Project, a proposed container terminal in Delta, BC.

The project would be funded by the port authority and private investment and increase container capacity on the west coast by 30%.

The three-berth marine container terminal would provide 2.4m teu of additional container capacity annually.

The project has been undergoing a federal environmental

assessment since 2013. In early 2022, the Impact Assessment Agency of Canada concluded a public comment period on the project.

Roberts Bank Terminal 2 requires federal approval and other permits before it can proceed.

A further challenge was an increase in exports of empty containers to Asia, which restricted the number of containers available to Canadian exporters.

Mr Silvester called for industrial land across the port region to be made available to help alleviate

congestion pressures on the supply chain created by demand surges and unexpected disruptions, while creating more flexibility and options for shippers to reach critical export markets.

Port authority: Vancouver Fraser Port Authority, 100 The Pointe, 999 Canada Place, Vancouver, BC, Canada V6C 3T4

Website: www.portvancouver.com

Email: Commercial_Enquiries@portvancouver.com

Terminals (Operators):

Centerm (DP World Vancouver)

Deltaport (GCT Canada)

Fraser Surrey Docks (DP World)

Vanterm (GCT Canada)

19

Throughput 2021: **3,672,000 teu**, **28.1%** (2020: 5,110,000 teu)

51 Dalian (China)

Bohai Rim port tops the list of China's fastest-declining container facilities for the second year

DALIAN port is hitting all the wrong records, topping the list of China's fastest-declining container facilities for the second straight year.

However, in 2021, it was not due to loss of traffic to fellow provincial port Yingkou — which also saw a nearly double-digit decline in throughput — but because of overall conditions.

The port's hinterland has been significantly impacted by trade frictions and Covid outbreaks.

The Bohai Rim region is dominated by domestic trade routes, which account for 56% of volumes, while connections to regional ports in Japan and South Korea make up the bulk of international trade.

Dalian's Northeast Sea-Land New Corridor concept — which boasts service coverage for Southeast Asia, Japan and South Korea, as well as the domestic southeast coastal areas — is China's designated northern transportation corridor, connecting East Asia to Central

Asia and all points west. In theory, it appears impressive.

In 2021, Dalian port's parent company, Liaoning Port Co, added five new foreign trade container routes and three new domestic container routes.

Hoping to take advantage of new trade conditions, the port's network now covers all the core ports of Regional Comprehensive Economic Partnership countries, including one to Australia — a curious choice, considering the current state of bilateral ties.

With the best of intentions, the port launched a multimodal transport project with open-top rail containers and new routes such as Dalian-Moscow, Dalian-Duisburg and Dalian-Novosibirsk, all sadly overtaken by events as Russia's invasion of Ukraine put a dampener on trade to that region.

The recently launched Dalian-Japan rail-sea service run by SITC saw a grand total of just 20 containers making the onward journey to Shimizu from their origin in Warsaw.

Already the group is talking of "improving" the quality of China-Europe trains by "adjusting the market price", usually code for the time-tested practice of using government subsidies to gain market share.

Western sanctions have also caused shippers to balk at using services that transit Russian territory, as many of the rail connections from Dalian do.

There are indications, however, that Sino-Russian trade has increased after the sanctions, boosted by Dalian port providing yuan settlement services for freight and other conveniences to aid Chinese companies and other parties that are less concerned about trading with Russia.

It is unclear if these will offset the volumes Dalian had hoped to gain from developing the northeastern land-sea passage.

Meanwhile, new domestic routes to Lianyungang and, most recently, to Ningbo will boost connectivity to Jiangsu province

and international services, respectively.

The inclusion of Dalian as one of three northern ports that can accept international relay shipments from Shanghai under a trial to relax cabotage rules may also help.

In addition, the group's finances have been boosted.

In November 2021, a new share issuance raised Yuan 2.1bn (\$31.7m) and introduced strategic investors such as Ansteel Group and China Communications Construction.

Dalian has the unfortunate fate of being in the right place at the wrong time. Only the future will tell if the wheel of

geopolitical fortune will finally spin in its favour.

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

Terminals (Operators): Dalian Container Terminal (Dalian Port Group, PSA, Cosco Shipping, NYK)

➔ 2

Throughput 2021: **3,651,000 teu**, ➔ **10.6%** (2020: 3,300,200 teu)

52 Yantai (China)

Strong growth momentum extends into 2022, despite Covid-led disruptions

THE 10% throughput growth made Yantai, located in northeast China, one of the country's fastest-growing ports in 2021.

The momentum has extended into 2022, with handlings up 12.4% for the first six months, according to the latest available data from the transport ministry.

The strong results come amid continued efforts by the port to expand networks and streamline operations, according to Yantai Port Group, the main operator.

Yantai has continued to strengthen its links with South Korea, the largest market for its exports/imports, helped by the geographic proximity. Volume on

those routes increased by about one-quarter in 2021.

On domestic trade, new services were launched to connect to nearby seaports such as Dalian, or inland cities such as Chongqing, to gain access to more cargo.

Meanwhile, the conversion of bulk cargo — especially woodchips and copper concentrates — into container shipments has provided an extra thrust. Liftings of these increased more than threefold for the first quarter of 2022.

Another highlighted aspect is the operational integration of international and domestic services at the port. The move

has substantially increased berth capacity and utilisation, enabling the docking of more vessels.

Since March 2022, the rising Covid infections in China have brought disruptions to cargo logistics, YPG said. However, thanks to a developed railway system in the region, the sea-rail intermodal transport has helped the port reduce its impact.

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)

➔ 5

Throughput 2021: **3,561,432 teu**, ➔ **12.6%** (2020: 3,161,658 teu)

53 Balboa (Panama)

Throughput increases via the Panamanian port's two container terminals

PANAMA'S Pacific port of Balboa moved up five places in the Lloyd's List Top 100 Ports from 58th position in 2020 to 53rd in 2021.

It saw throughput in 2021

increase by 12.6%, which was an improvement on the not-insignificant 9.2% growth seen in the previous year.

Of Balboa's two container terminals, the

Hutchison-operated Panama Ports Co (PPC) terminal saw the greatest growth at 19.4%, having handled 2.3m teu in 2021.

This compared to 1.7%

growth in 2020, when it saw a throughput of just under 2m teu.

In June 2021, the Panama Maritime Authority authorised the renewal of a 25-year concession to PPC.

Meanwhile, Balboa's other container terminal, PSA-International Panama, grew by 1.9% to 1.23m teu in 2021

in comparison to 23.6% growth in the previous year when it handled 1.2m teu.

A total of 1,017 containership calls were handled at Balboa during 2021, compared to 2020's 1,088. The largest vessel to call in 2021 was the MSC-operated, 15,000 teu capacity, new-panamax boxship

MSC *Virgo*, which called at the PSA terminal.

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)

➤ 10

Throughput 2021: **3,531,762 teu**, ➤ **19.4%** (2020: 2,958,040 teu)

54 Barcelona (Spain)

Having bounced back after pandemic losses, the focus has now switched to innovation investment, aligning the port to decarbonisation and digitalisation goals

THE recovery plan launched by the port of Barcelona in the wake of the Covid pandemic has clearly worked.

Having slumped 11% in teu throughput terms through 2020, the port powered back with an almost 20% increase in container traffic during 2021.

The \$12m in financial breaks doled out to support operators through the disruption more than paid off.

Containerised imports and exports rose 10% and 5%, respectively, while goods in transit were up 14% — and, for the first five months of 2022, the trajectory looks similarly promising.

Transshipment increases have been a strong growth driver and the port has been keen to stress its productivity credentials, which come with a strong package of services, stowage and intermodal links that have seen containerised rail traffic grow more than 18% year on year.

The strategic plan has now switched towards innovation in a bid to consolidate the improvements and ensure the efficiency of the port continues to pull in a more diverse customer base.

Barcelona's status as a European tech hub has helped foster a digitalisation base for businesses and partners inside the port.

The fourth strategic plan launched in May 2022 came with a heavy focus on developing Barcelona's 'smart port' status, "driving innovation and digitisation of the logistics ecosystem".

Some of this comes with tangible investment. The port authority is investing €110m (\$123m) into its 'Nexigen' project to decarbonise port activity and improve air quality.

This project will see \$100m plugged into onshore power supply systems that will connect all berthed ships to an electricity grid powered by 100% renewable

energy by 2030. It comes on top of more traditional investment already under way. At the end of 2021, the port management board approved a \$68m investment for increased capacity at the Hutchison Ports BEST terminal.

Hutchison said it would invest \$35.1m to increase its capacity by 26%, or 700,000 teu, while also ploughing just over \$30m into machinery, including 14 new automated cranes.

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)



Barcelona: has status as a European tech hub.

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55 Virginia (United States)

Increased demand combined with an efficiency focus leads to record volumes at the port

IT was a record-setting year for the port of Virginia, which handled more than 3.5m teu in 2021.

The 25% uptick in volumes was down to new services, reworked vessel rotations and new cargo transiting the port.

December was the most productive month in the port's history, with more than 325,000 teu being processed. This is 65,000 teu greater than the previous year.

Virginia became an attractive stop for liners, given its efficiency compared to other ports, according to the port authority.

The port largely avoided the congestion impacting both US west and east coast ports in 2021.

"We are kind of an exception, a little bit of a nice exception here," Stephen Edwards, chief executive of the Virginia Port Authority told Lloyd's List in September.

"We are operating very well and getting the same volume surges that everybody else is. But we're absorbing them and



Virginia: processed more than 325,000 teu in December 2021.

Port of Virginia

we are still in great operational shape."

At the time, he said the business model was key to Virginia's success. The port owns the terminals and acts as the operator, therefore overseeing all aspects of the business.

Still, the Virginia Port Authority is exploring ways to further increase efficiency.

A \$1.4bn investment package was announced in April 2022 to make several improvements over the coming years.

Included is the expansion of the Central Rail Yard at Norfolk International Terminals. When completed — estimated to be in 2023 — the port will have an annual rail lift capacity of more than one million units.

Construction will also take place to expand and modernise the North Berth at NIT, in line with what has been done at the South Berth of NIT and Virginia International Gateway.

The deepening and widening of the harbour and commercial channels will be addressed to allow for the safe accommodation of ultra large container vessels.

Port authority: Virginia Port Authority, 600 World Trade Centre, Norfolk VA 23510

Website: www.portofvirginia.com

Email: POVCustomerService@vit.org

Terminals (Operators):

Virginia International Gateway (Virginia International Terminals)
Norfolk International Terminal (Virginia International Terminals)

56 Houston (United States)

US east coast port sees unprecedented import volumes from increased consumer spending over the pandemic

LIKE others on the US east coast, the two container terminals at the port of Houston have continued setting records over the past two years on the back of the extra traffic spurred by the

pandemic-led boom in consumer spending.

The port is the biggest destination for containers in the US Gulf and as well as a 15.1% rise in throughput in 2021, it also

reported 20% year-on-year gains during 2022's first quarter.

The port reported that loaded outbound export containers were up 4% year to date, while May 2022 set a fresh throughput

record. Exports of empty boxes were 80% higher over the comparable January-through-April period, another trend that has emerged from the disruption and bottlenecks from global supply chain interruptions.

Container lines have shunned loaded exports over returning empty boxes back to Asia to recalibrate imbalances of the past 18 months.

Like many on the east coast, Houston is not only digesting unprecedented import volumes from increased consumer spending over the pandemic, but more calls from container lines that prefer to sail direct to the

east coast to avoid congestion at the ports of Los Angeles and Long Beach.

The Barbours Cut Container Terminal is operated by the port of Houston and is at the mouth of Galveston Bay. The authority said a modernisation programme to increase capacity to 2m teu from 1.2m teu was under way, without providing a figure for when work will be completed.

The second terminal, Bayport Container Terminal, will be capable of handling 15,000 teu-sized containerships once three cranes become fully operational after being delivered in February.

The port, also a crucial artery for shipping crude and refined products exports, is gearing up for a billion-dollar deepening and widening of the Houston Ship Channel, the 52 mile-long channel from Galveston Bay to Houston.

Contracts for nearly \$500m of the work were awarded over late 2021 and early 2022.

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)

1

Throughput 2021: **3,440,000 teu**, **7.8%** (2020: 3,220,000 teu)

57 Abu Dhabi (United Arab Emirates)

The addition of CMA CGM as its latest carrier tenant points to a bright future for the UAE's rapidly expanding box hub

ABU Dhabi slips one place in this year's rankings, despite a more than respectable near-7% hike in throughput figures.

Volumes of more than 3.4m teu came off the back of box gains at both of its terminal facilities, ensuring the growth trend at the rapidly expanding UAE hub continued.

The Middle Eastern port has more than doubled its annual container trade in the space of three years, having essentially locked in two of the largest ocean carriers, Mediterranean Shipping Co and Cosco Shipping, through their respective terminal arms as long-term customers.

Cosco Shipping Ports moved into the port's second terminal, CSP Abu Dhabi Terminal, in 2018.

Earlier that year, MSC, through Terminal Investment Ltd, agreed a long-term tender with local operator Abu Dhabi Ports to operate and expand the existing



Abu Dhabi: more than doubled its annual container trade in the space of three years.

Abu Dhabi Ports

Khalifa Port Container Terminal. The presence of MSC and Cosco has helped draw a number of mainline services, with the pairing increasingly looking to make use of their invested interests by driving volumes through the port.

Yet the two carriers will soon be joined by a third, in the form of CMA CGM. In the process, Abu Dhabi will lay claim to having three of the top four container lines as tenants.

In September 2021, the

Marseilles-based shipping group, through its subsidiary CMA Terminals, agreed a joint venture with AD Ports on a new 1.8m teu capacity semi-automated terminal at the port.

Under a 35-year concession, CMA Terminals and AD Ports will invest \$154m into the facility. Construction works are already under way, with the first phase of operations slated to start in 2024, incorporating an initial 800 m quay. Even before news of

CMA CGM's entry into the port, AD Ports expected capacity to swell to as much as 9m teu by 2024, as MSC and Cosco continued to ramp up business.

With CMA CGM joining the party, Abu Dhabi looks set to ascend the rankings to become a

top 50 regular. However, if volumes climb as anticipated, it may soon have its eyes on fellow UAE port Dubai and its once-deemed-insurmountable crown as the Middle East's premier container destination.

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)

6

Throughput 2021: **3,400,000 teu**, **↓ 0.6%** (2020: 3,420,000 teu)

58 Dongguan (China)

Pearl River Delta port fails to emerge from the impact of the pandemic

DONGGUAN was still reeling from the nightmare of Covid during 2021, with throughput hovering well below pre-pandemic levels.

Box volume decreased by 0.6% to 3.4m teu, compared to 2020 and 2019 when they were 3.42m teu and 3.68m teu, respectively.

The Pearl River Delta port, flanked by Guangzhou to the north and Shenzhen to the south, fell victim to severe Covid infections again, as did its neighboring ports.

The manufacturing hub of Dongguan, in China's most populous province Guangdong, launched mass coronavirus testing in June and some communities entered into lockdown, after the city detected the infections.

While Dongguan's cargo flow

was disrupted by the lockdowns within the city, the one-month suspension of its neighbour port Yantian also added to Dongguan's pressure as line operators avoided the region and the efficiency of logistics services decreased.

Some entrances to highways to other cities in the region were blocked during the period.

In response to the pandemic-induced supply chain disruption, Dongguan Port Group actively sought a breakthrough after restrictions were removed.

It lobbied for additional direct calls at the port from carriers, while other major ports in the region were still struggling with coronavirus outbreaks.

The port said in a statement that major carriers, including CMA CGM, Maersk, Cosco and

MSC, had responded positively to its appeal.

Dongguan introduced storage and barge services for export-laden boxes, to relieve the pressure off factories.

It also co-operated with local customs to replan the port sections and expand the area where domestic containers and international containers could both be handled.

Dongguan said the move helped to improve port efficiency by 20%.

Port authority: 23F, Dongguan Port Enterprise Headquarters Building, Port Avenue, Shatian Town, Dongguan City, Guangdong Province, China

Website: en.dgportgroup.com

Email: dggwjt@dgportgroup.com

Terminals (Operators):

Dongguan International Container Terminal (DPG-Zhonghu)
Dongguan Sinotrans Shilong Terminal (Sinotrans)

6

Throughput 2021: **3,371,400 teu**, **↑ 15.9%** (2020: 2,909,632 teu)

59 Manzanillo (Mexico)

Mexico's largest port registers significant growth as box volumes recover

MEXICO'S largest container port at Manzanillo, on the Pacific coast, registered its highest ever box throughput in 2021,

after it handled almost 3.4m teu. Manzanillo increased its throughput by some 15.9% in 2021 in comparison to 2020,

when it handled 2.9m teu. The year 2020, in common with many other ports, actually saw volumes drop by around 5.2% due

to the impact of the coronavirus pandemic.

The port's two container terminals, operated by International Container Terminal Services Inc's Contecon and SSA Mexico, handled more than 1.2m teu of import boxes between them.

Transshipment containers accounted for more than 0.9m teu. In terms of exports, it handled almost 1.2m teu, with 64% of these being empty containers.

Boxship movements made up the lion's share of vessel traffic at the port of Manzanillo in 2021, when a total of 1,872 ships were handled.

Containerships provided 66.9% of all vessel movements.

This was followed by general cargoships, making up 13.6%, and bulk carriers, which provided

11.5% of vessel movements. In turn, this was followed by tankers, cruiseships and gas carriers, at 7.7%, 0.2% and 0.1%, respectively.

New container liner services commencing in 2021 at Manzanillo included a dedicated feeder link introduced by X-Press Container Lines to connect the SSA Terminal with Acajutla, San Salvador and San Lorenzo, Honduras.

The bi-weekly service commenced in September, utilising a single 1,300 teu capacity ship.

Significant forthcoming developments at Manzanillo include the expansion of the Contecon-operated terminal.

A \$230m investment will expand the terminal's facilities and improve existing

infrastructure to cater for long-term container volume growth.

The construction process, which will expand the terminal's capacity by 300,000 teu to around 1.7m teu, was expected to commence in the second half of 2022.

The expansion project includes new quay cranes, rubber-tyred gantries and port tractors and accompanies a publicly funded project for the expansion and the adaptation of land access to the terminal, which was announced for the port in November 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: antencionclientes@puertomanzanillo.com.mx

Terminals (Operators):
Contecon Manzanillo SA (International Container Terminal Services Inc)
Terminal Especializada de Contenedores (SSA Mexico)

5

Throughput 2021: **3,353,781 teu**, **2.5%** (2020: 3,272,213 teu)

60 Incheon (South Korea)

Port authority offers incentives to shipping companies to launch new services as preparations for expansion continue, despite the pandemic

INCHEON port continued its steady growth in 2021, posting more than 3.3m teu handled for the year, a rise of more than 80,000 teu.

The split was even, at 1.7m teu for imports (up by an impressive 4%) and 1.6m teu for exports (up by 2%).

Transshipment volumes hit 54,000 for the year, with 8,000 teu involving coastal passages.

Not surprisingly, given Incheon's location — facing west to China — PRC cargo dominates the port's figures.

Some 974,000 of the 1.7m teu imported by Incheon originated in Chinese ports, while 1m teu of the 1.6m export containers were destined for China, representing 58% of import containers and



Incheon: further growth in throughput has encouraged a push for 3.5m teu.

ZUMA Press, Inc / Alamy Stock Photo

64% of export containers. Vietnam, Taiwan, Thailand and Indonesia also sent containers to Incheon, with boxes leaving Incheon for Vietnam, Taiwan, Hong Kong and Malaysia.

The pace of growth slowed in the second half of 2021 amid heightened uncertainties, notably mutations of the Covid virus. However, expansion was maintained.

As an inducement, the port authority offered incentives to shipping lines calling at Incheon to take containers to Southeast Asia to balance exports with imports.

Meanwhile, efforts were stepped up to ease supply chain congestion.

During the year, six new routes were added, increasing the number of regular container services to 66 — the highest number of services at the port — connecting Incheon with ports in the Asia Pacific region, the



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Americas, Africa and Russia.

The port authority's executive vice-president Kim Jong-gil said preparation work continued for Incheon New port phase 1-2, in spite of the global supply chain crisis and Covid-related difficulties.

The selection of operators in the commercial and cold chain

special zones was still to be firmed up, and more routes were at the planning stage, he said.

Incheon's priorities for 2022 include the opening of five new routes, including to the Americas and India, and a focus on frozen and refrigerated cargo. Mr Kim aims to hit 3.5m teu in 2022.

Port authority: Incheon Port Authority, (22332) New JungSeok Building, 366, Seohae-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 Incheon Container Terminal (HJIT)

2

Throughput 2021: **3,343,810 teu**, **7 6.9%** (2020: 3,127,579 teu)

61 Cartagena (Colombia)

Despite serving fewer containership calls, the Pacific port still increases its box throughput

CARTAGENA, located on South America's Pacific coast, is Colombia's largest port. It is the fourth-largest container port, in terms of container throughput, in Latin America after Santos, Colón and Balboa.

Via its two container terminals, operated by Sociedad Portuaria Regional de Cartagena (SPRC) and Terminal de Contenedoras de Cartagena (Contecar), it increased its container throughput by 6.9%, from 3.1m teu in 2020, to more than 3.3m teu in 2021.

Cartagena serviced almost 2,000 containership calls in 2021, slightly down from 2020, when 2,127 boxships called at the port.

Major liner operators CMA CGM, Maersk Line, Hapag-Lloyd, Ocean Network Express, Mediterranean

Shipping Co and Yang Ming were the main users of the port in 2021, with the largest boxship to call at Cartagena in 2021 being Yang Ming's 14,200 teu capacity *YM Warranty*.

Both of Cartagena's container terminals are located in a deepwater bay, with a depth of 21 m. It has a limited tidal variation, which permits calls by the latest generation of new-panamax containerships, which are making up an increasing proportion of total vessel calls.

As well as being a significant transshipment hub, several multinational companies distribute their products to more than 15 countries in the region, from the only international

distribution centre that operates within a port in Latin America, the Contecar facility.

Planned developments at Cartagena include the expansion of storage facilities at SPRC in a \$6.6m investment.

This includes the demolition of two warehouses, the refurbishment of 20 sheds and the relocation of five existing terminal buildings in to a single one. The work is expected to be completed in 2022.

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 Contenedoras de Cartagena (Contecar)

13

Throughput 2021: **3,292,300 teu**, **6.5%** (2020: 3,520,000 teu)

62 Fuzhou (China)

Volume contraction accelerates amid a Covid outbreak and seepage of business to nearby ports

FUZHOU port's slow slide into the background as the ignored middle child of the southeast

Chinese coast container port market continued in 2021, with a 6.5% decline accelerating the

downtrend that was already in evidence the year before.

While the port's fortunes had

not been helped by a Covid outbreak in Fujian province and other parts of the south in the latter part of 2021 — which inevitably put a dampener on overall volumes as lockdowns kicked in — the writing was already on the wall, with the parent group positioning the main Fujian province port of Xiamen as an international maritime centre.

Interestingly, international box traffic actually rose slightly in 2021, led by a 2% increase in imports, while container trade with Taiwan rose 3.5% on a 7% spike in imports especially.

This suggests the drop in overall volumes are due to losses in domestic traffic, presumably due to seepage to Quanzhou, Fujian's designated domestic trade port.

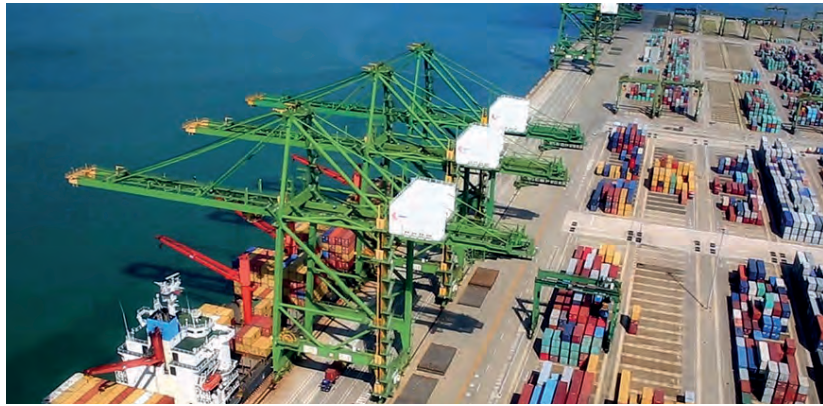
Notwithstanding, the authorities do seem to be putting some resources into the port, with the Fuzhou Municipal Government and Fujian Port Group signing an agreement to develop it as a Silk Road Seaport City.

This, however, seems to be more of a propping-up exercise for the recently consolidated port group than anything else, with the municipal government pushing municipal state-owned enterprises to take shares in the provincial port group and support the expansion of its construction and operation business.

This has been combined with the usual menu of tried and tested tactics to boost volumes.

Subsidies continue to be given for both international and domestic traffic, as well as specifically for cross-Straits volumes, in efforts to help Fuzhou plug away at its deemed role as a Taiwan trade/niche international container port.

This seems somewhat counterproductive, given that subsidies are also being offered at Xiamen, the southeast coast's dominant container port.



Fuzhou: leverages on its close location to northern Taiwan.

Rong Qiao Group

A two-year subsidy until end-2024 will see support being given to boost international boxes in particular, with amounts based on volume growth targets.

Subsidies for the construction of inland container depots and more railway interconnectivity plans — currently de rigueur among Chinese ports — are other inspired projects from management.

Initiatives such as the Silk Road Maritime Digital Information Platform, where PSA is a key stakeholder since joining in 2021, will help bring Fuzhou into the wider network of China's flagship Belt and Road Initiative.

This will integrate existing ports, logistics and supply chain information resources in Fujian and expand smart digital collaborations in China and globally.

Meanwhile, there seems to be a hint of the new direction for the port, with Fuzhou being designated as the location of the Fuzhou New Area, one of 14 national level new areas — China's term for the development of new cities that have a specific area of focus.

With a target for the port to hit 4.2m teu by 2023 and leveraging on its close location to northern Taiwan, the special district has been designated as a zone for Taiwanese investment and co-operation, especially in the digital economy.

There are currently about 60 Taiwan-funded enterprises and nearly 90 Hong Kong and Macao-funded enterprises there.

New e-commerce-specific services have been initiated and China's big players in the space have a presence in Fuzhou. This could dovetail well with possible specific so-called fast container services, if they come to fruition.

The focus of development and expansion efforts is on building up the Jiangyin port area, where berths 15-17 are being completed, as the main integrated container hub managed by the sole operator Fuzhou Port Group and PSA, while developing Luoyuan Bay up the coast as a logistics-handling facility.

It seems Fuzhou port's struggle to discover its role will continue until the authorities produce a better-defined vision for it.

As a middle child in an authoritarian family, it is unlikely that the port's management will find the confidence to seek its own fortunes.

Port authority: Fujian Port and Channel Administrative Bureau, No 283 Yanqiao Middle Road, Fuzhou, Fuzhou, China

Website: www.jtyst.fujian.gov.cn

Email: ghjbgs@fjyt.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)

3

Throughput 2021: 3,293,000 teu, ↑ 5.5% (2020: 3,120,000 teu)

63 Tangshan (China)

The port has a clear focus on its place in the Beijing-Tianjin-Hebei region, while taking advantage of China's dual-circulation policy

TANGSHAN port continues making steady gains in throughput, with the 5.5% increase to almost 3.3m teu in 2021 entrenching it further within the 3m teu bracket.

Through the year, the port has made efforts to develop new markets, such as to Japan, South America and Africa, while also increasing service frequency on key routes to South Korea and Vietnam, and moving forward with its strategy of building up its feeder hub position in the Bohai Rim.

The consolidation of most of the port's assets into the Tangshan Port Group International Container Development Company in August 2021 has helped to streamline processes at the container terminals of Jingtang and Caofeidian, while also giving impetus to the container shipping operations of the port that was, until recently, mainly a bulk trade facility.

This has opened feeder links between the two terminals,

while also boosting the existing Jingtang-Qinzhou route with the addition of a call at Caofeidian.

The port has a clear focus on its place in the Beijing-Tianjin-Hebei region, while taking advantage of China's dual-circulation policy.

In 2021, multiple co-operation agreements were signed with parties ranging from inland Shanxi province's transportation authorities to port authorities of the Yangtze River Delta and Greater Bay Area hubs of Shanghai and Guangzhou, respectively.

The weekly Tangshan-Shanghai-Guangzhou dual-circulation route will be the backbone of the GBA's north-south logistics channel, while the Jingtang-Caofeidian-Qinzhou route has capitalised on the rise of the southwestern hub as China's new gateway to Southeast Asia.

Meanwhile, a new route to South Korea's Pyeongtaek Port is expected to open up new opportunities for exports into

the Regional Comprehensive Economic Partnership market. This is Tangshan port's seventh direct service to Northeast Asian ports.

Landside investment includes the development of the Tang-Cao Railway East Extension project, which will link the two container terminals to the railway network.

Along with this, a major logistics facility, the Tangshan Port International Smart Logistics Park project, is also being developed.

Tangshan port is lucky to have emerged relatively unscathed from Covid-related issues in 2021, with generally smooth operations and development plans on track as it consolidates its container port operations.

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)

3

Throughput 2021: 3,214,548 teu, ↑ 13.2% (2020: 2,839,977 teu)

64 Chittagong (Bangladesh)

Bangladeshi box hub bounces back to post stellar throughput numbers, despite the port's much-maligned capacity constraints

CHITTAGONG reversed the previous year's Covid-induced losses — and then some — in 2021, elevating throughput totals by more than 13% to 3.2m teu.

However, the feat — a new annual handling record for the Bangladeshi box hub — is all the more impressive with Chittagong's ongoing capacity constraints.

Designed to handle around 2m teu, Chittagong's quays are being stretched to the limit.

The port plays a vital role in Bangladeshi's burgeoning ready-made garment trade, as the key

export hub to serve increasing demand from markets overseas.

Chittagong's expansion has been long in the works, but finally Bangladesh's premier port will soon be offered some respite.

At the time of writing, the long-awaited Patenga Container Terminal, Chittagong's third box facility, was due to start operations any day, barring any last-minute snags.

Although PCT will relieve at least some pressure, and allow vessels of up to 4,500 teu to call Chittagong compared to today's 2,000 teu maximum, this will only provide around 500,000 teu of additional capacity. In other words, it is still short of requirements.

Further, the Chittagong Port Authority has yet to assign a private operator to run the facility, despite significant interest from a number of major global players.

The plan is for the CPA to take charge of initial operations before a preferred suitor comes on board.

Upon PCT's inception, the CPA's focus will then turn to the port's other major development that is hoped will be a game-changer for not only Chittagong but Bangladesh's box-handling trade.

The Bay Terminal project will consist of three terminals — two container and one multi-purpose — to more than double Chittagong's 'designed' capacity.

Singaporean port operator PSA International announced in 2021 it is conducting a feasibility study into one of the container terminals, while local reports suggest DP World has been sounded out as a potential tenant for the second facility.

With construction works yet to get off the ground, Bay Terminal's inauguration is still a way off. Yet once it is up and running, Chittagong could finally achieve its much-cited potential.

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)

8

Throughput 2021: **3,146,553 teu**, **↓ 1.5%** (2020: 3,193,360 teu)

65 Gioia Tauro (Italy)

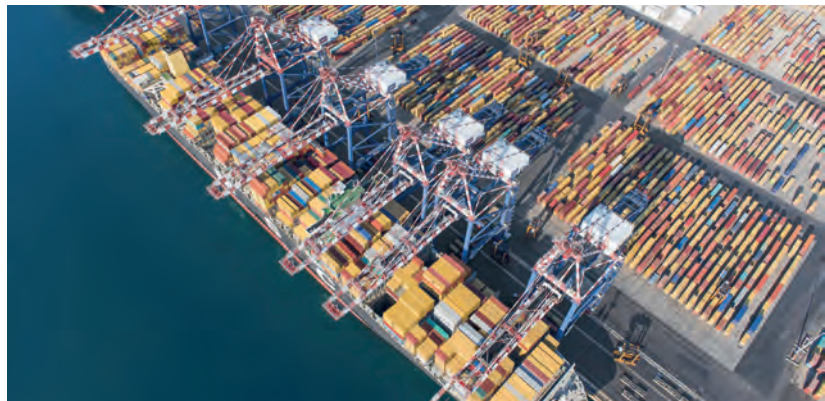
Growth ambitions are checked by a slight downturn in throughput

GIOIA Tauro remains Italy's leading transshipment port. It sees itself as vying for a larger slice of the crowded Mediterranean transshipment market, rather than as an Italian gateway port.

However, its ambitions received a check in 2021, with a slight downturn in throughput, which will doubtless come as a disappointment after growth of 27% in 2020, following the acquisition of its Medcenter Container Terminal by MSC interests the year before.

That said, consolidation at a 3m teu-plus level of throughput is an achievement in itself, marking a return to volumes last seen more than a decade ago, prior to the departure of Maersk as a key customer. Throughput peaked at just under 3.5m teu in 2008.

Unfortunately, Gioia Tauro has been on the receiving end



Gioia Tauro: can handle as many as four ultra large containerships at one time.

MSC

of bad publicity in the Italian and international press of late, after an official report found that an organised crime gang was using it as a hub for smuggling operations.

Nevertheless, it remains a splendid natural harbour, with water depths of up to 18 m, and

can handle as many as four ultra large containerships at one time.

Port authority: Contrada Lamia, 89013, Gioia Tauro, Italy

Website: www.portodigioiatauro.it

Email: info@portodigioiatauro.it

Terminals (Operators):

Medcenter Container Terminal (Terminal Investment Italy, 100% owned by MSC)

7 3

Throughput 2021: 3,111,000 teu, ↑ 12.2% (2020: 2,772,000 teu)

66 London (United Kingdom)

After several flat years, volumes handled by terminals along the River Thames increase; a fourth berth at London Gateway will help meet future demand

THE Port of London recorded a hefty increase in container traffic during 2021, thanks largely to DP World's London Gateway, where throughput rose 15%.

Furthermore, growth prospects look positive, with work starting on London Gateway's fourth terminal in mid-2022, while the planned Thames Freeport is expected to generate additional cargo for the terminals located along the River Thames.

These include Tilbury's London Container Terminal, and Ford Motors' Dagenham plant, as well as London Gateway.

The latter remains a key partner in the freeport consortium, despite some local protests following the outcry in early 2022 over the way DP World's P&O Ferries subsidiary dismissed nearly 800 seafarers.

The Port of London Authority is also a Thames Freeport partner.

London Gateway, which handled a record 1.8m teu in 2021, now accounts for nearly 60% of the 3.1m teu total handled by terminals within the geographic scope of the PLA, which is responsible for 95 miles of the River Thames.

The other major player is

Forth Ports' London Container Terminal, located in the Port of Tilbury alongside the ro-ro facility Tilbury2 and other cargo berths. Ford also handles containers at its dedicated terminal.

The strong performance in 2021 lifted London up three places in the 2021 global rankings to number 66 in the world.

Congestion plagued many ports during 2021, not least those in southeast England, including terminals on the Thames.

Nevertheless, London Gateway did not suffer the severe berth congestion and delays that hit some competitors, helped by the large amount of land adjacent to the port in its logistics park.

Indeed, some of London Gateway's growth was attributed to freight temporarily diverted from other nearby ports, though it also gained six new services during the year.

The £300m (\$375m) fourth berth, which will increase capacity by one-third, will give London Gateway the ability to handle more of the world's biggest vessels than any other port in Britain, according to DP World.

Completion is scheduled for 2023, coinciding with the

delivery of a new generation of 24,000 teu vessels deployed in the Asia-Europe trades, which currently represent about 20% of throughput.

Services from Latin America and the Mediterranean also account for around 20% of volumes, with the Middle East, Africa, North America and Australasia making up the balance.

London Gateway's huge logistics park continues to attract business, with three new tenants signing up in the first few months of 2022. These include Transmec UK, a transport and logistics company that is building a 150,000 sq ft distribution hub.

In summer 2022, London Gateway took delivery of the first ever all-electric terminal tractor at a British port, with plans to make the facility's entire 11-strong fleet all-electric in the near future.

Port authority: Port of London Authority, London River House, Royal Pier Road, Gravesend, Kent DA12 2BG, UK

Website: www.pla.co.uk

Email: corporate.affairs@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)

7 6

Throughput 2021: 3,109,800 teu, ↑ 3% (2020: 3,020,000 teu)

67 Nanjing (China)

Covid flare-ups in China put the port's future in the balance

BEING a key part of the Yangtze River Delta inland trade network, Nanjing Port's performance is

inevitably affected by the Covid situation in China.

While the hub serving the

middle reaches of the river still managed to eke out a 3% rise in throughput to 3.1m teu in

2021, the zero-Covid policy's unpredictable effects puts its future very much in the balance.

The latest series of Covid flare-ups in China in late 2021 and the earlier part of 2022 shows how quickly and seriously it can have an impact on Nanjing, with international volumes in January alone reportedly plunging by nearly three-quarters.

This was caused by an outbreak among Yangtze River pilots in December 2021, which caused a massive snarl-up at the already congested ports in the area.

In August 2021, a prior outbreak of the virus saw warnings being made about more shocks to the global supply chain.

The port has maintained efforts to keep its route network up to date, opening, expanding or optimising 11 routes in 2021.

These include feeder routes such as the new Taicang Zhenghe International-Southeast Asia route and the addition of Hakata to the Nanjing-Kansai route.

Nanjing port's South and North China services have had capacity added with larger vessels, while an inland waterway connection to Shandong has been added.

Nanjing port currently has 177 container routes per week.

Other intermodal connections will also be boosted with the completion of a dedicated freight rail line linking Nanjing Port Longtan Port Area to Shanghai Port.

The Nanjing Yangtze River Shipping and Logistics Center will enhance the port as a hub city and enable a seamless port-to-rail connection.

The port's Nanjing Shipping Trading Center has also launched the Nanjing Jianghai Shipping Logistics Container Volume Index (NJCQI), the first river-ocean shipping logistics container cargo volume index for Yangtze River ports.

This purports to measure domestic and foreign volumes at Nanjing port and give a better idea of industry trends such as market size and structure.

However, the process of port reorganisation within the Jiangsu Port Group, which began in earnest in 2020, resulted in dramatic shifts during 2021.

Other river ports, such as Taicang and Nantong, shot past Nanjing in percentage growth

terms and with their overall volumes in some cases, meaning the prospects of the latter recovering the huge volumes lost in 2020 look increasingly slim.

All this may be part of a broader rethink of the supply chain and logistics networks of the world's largest manufacturing complex.

Foreign investors' disappointment at official policy may add to a nascent outflow of production capacity. A large proportion of Nanjing's container exports are comprised of consumer appliances.

The container sector in China generally recovered well from Covid in 2021. However, some ports such as Nanjing, while continuing to improve services, may ultimately be hamstrung by the changes made evident by the pandemic.

Port authority: Jiangsu SASAC, Su-grain International Building 338 Zhongshan Rd, Nanjing, Jiangsu Province, China

Website: www.jtport.com.cn

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)

79

Throughput 2021: **3,018,550 teu**, **7 28.1%** (2020: 2,356,308 teu)

68 Le Havre (France)

France's largest container port picks up 90 additional calls turned away from Rotterdam and Antwerp

FRANCE'S largest container port Le Havre bounced back from the pandemic by growing its container throughput fractionally over 28% in 2021, putting it at an all-time high figure of more than 3m teu.

Transshipment traffic "expanded spectacularly", in the port's own words, increasing by 79%.

In particular, Le Havre

seems to have done well from the congestion experienced elsewhere in the north continent range, picking up 90 additional calls originally scheduled for Rotterdam or Antwerp.

However, there were criticisms from some operators. CMA CGM at one stage suspended calls by its Eurosal service connecting Northern

Europe with the west coast of South America and the Caribbean.

The French boxship major cited both congestion and a lack of productivity as the reasons for its decision.

On a brighter note, Hapag-Lloyd and Turkey's Arkas recently added Le Havre to their Northern Europe/West Africa service rotation.



Le Havre: bounced back from the pandemic.

Haropa

Operator Haropa Port is currently finalising the \$162m

Port 2000 expansion project, to allow two new berths to be

operated. Covering an area of 42 ha and 700 m of quay, it will offer reception capacity for an additional 1m teu once completed, hopefully later in 2022.

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:

Terminal de l'Atlantique (Compagnie

Nouvelle de Manutention Portuaire)

North Terminal (GMP)

7

Throughput 2021: **2,967,765 teu**, **21.6%** (2020: 2,441,589 teu)

69 Marsaxlokk (Malta)

An important gateway between international markets and Europe, the port sees volumes rise on the back of new regular services by major lines

MALTA Freeport clawed back container volumes, which rose by almost one-quarter in 2021 to the highest level since 2018, as new regular services with mega boxships helped throughput.

CMA CGM, a major stakeholder in the port, started weekly calls on its FAL1 France-Asia service, using the largest liquefied natural gas-powered ships.

Mediterranean Shipping Co also chose Freeport for a number of regular mainline services, namely the Canada Express Service 1, the California Express, and the Indus Express Service, which links northwest India, Pakistan and the Middle East with Europe.

The port is an essential hub, linking 110 ports around the world — half of which are in the Mediterranean — and other lines also frequent the port, such as Ocean Alliance partners

including Hapag-Lloyd, Cosco and Evergreen.

There were 1,690 ship calls in total during 2021.

Since the port was privatised in 2004, it has spent more than €320m (\$325m) in upgrading all areas of operation, from developing berths to adding equipment.

Last year, two megamax quay cranes, acquired from Liebherr, were installed and are now fully operational, allowing the handling of 23,000 teu ships.

Freeport also invested in six additional reefer structures, taking capacity to 2,180 units from 1,840 previously, while a new wash bay and six new refuelling facilities are being developed.

The terminal operating system, meanwhile, was upgraded to version 3.8.18 bringing Freeport in line with current TOS technologies.

Future growth plans include

squaring off the north quay at terminal two, increasing the size to 688 m, and adding two more megamax cranes, which can reach 25 containers across, giving a seven-crane formation.

The west quay will also be increased to 313 m.

Freeport also plans to invest in ancillary equipment to increase efficiency of yard operations, with the addition of empty handlers, forklifts and tractors.

Meanwhile, the government of Malta is investing in a shore-to-ship project designed to reduce emissions at the port. The system should be operational in 2024.

Port authority: Malta Freeport Terminals, Freeport Centre, Port of Marsaxlokk, Kalafrana BBG3011, Malta

Website: www.maltafreeport.com.mt

Email: marketing@maltafreeport.com.mt

Terminals (Operators):

Terminal One (Malta Freeport)

Terminal Two (Malta Freeport)

4

Throughput 2021: **2,942,550 teu**, **↑ 1.9%** (2020: 2,887,800 teu)

70 Ambarli (Turkey)

Port increases its throughput after two years of reductions on the back of an improved Turkish economy

TURKEY'S biggest port bounced back in 2021 as the country recorded a strong performance relative to 2020.

After two years of throughput reductions, the port of Ambarli recovered in 2021, with total volumes rising by a modest 1.9% to edge closer to 3m teu again.

Turkey's economy grew by 11% in 2021, in a resilient response to the damage incurred by the pandemic in 2020.

Exports also rose by a towering 32.9%, in terms of value, with the European Union, the US and the UK remaining Turkey's most important markets.

Meanwhile, imports further

grew by 23.6% compared to 2020.

Ambarli's location in the Sea of Marmara and close proximity to Istanbul makes it a strategic link between the Mediterranean and the Black Sea.

The China Merchants-Cosco Pacific venture Kumport recorded a 2.5% throughput increase to hit more than 1.2m teu in 2021, having shrunk in 2020.

The smaller Mardas terminal also handled more cargo, having fallen to its lowest level since 2003, in 2020.

Despite the port's overall increase in traffic, Marport, Ambarli's biggest operator, saw a 3.5% decrease at its terminal, which handled 1.5m

teu, the lowest throughput level since 2009.

Also in 2021, Turkey's competition authority halted an attempted takeover of Marport by Terminal Investment Limited.

TIL owns Marport in conjunction with partner Arkas Group, and was seeking to buy out its partner's share to gain total control of the company.

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 (Mardaşport)

8

Throughput 2021: **2,909,288 teu**, **↓ 2.9%** (2020: 2,995,248 teu)

71 Melbourne (Australia)

Strikes and congestion weigh on throughput at the southeast Australian port

THROUGHPUT dropped for a second consecutive year at Melbourne, Australia's largest container port, as congestion, inefficiencies and strike action by dockworkers weighed on both imports and exports.

In contrast to Sydney, which saw a 9.5% rise over 2020, Melbourne's throughput declined 2.9% in 2021.

Australian borders remained closed to international travellers in 2021 and global, pandemic-related supply

chain disruptions interrupted sailing schedules along the eastern coast, rippling out to land-based delays and cancellations.

Although borders reopened to international travel in early 2022, Melbourne's container trade has not yet shown signs of growth.

May 2022 volumes were down 6% compared with the same period in 2021, while year-to-date imports are 2.5% lower.

Melbourne's three container

terminals resolved industrial action with the Maritime Union of Australia that extended over two years, while national debate over Chinese investment in infrastructure renewed scrutiny over the port's sale seven years ago.

A consortium that included a Chinese sovereign wealth fund bought the port of Melbourne where the three container terminals operate, via a 50-year lease.

Protracted industrial action

concluded in February 2022, when the union reached a deal with Patrick Terminals, which operates Swanson Dock East. Patrick Terminals was the last container operator at the port of Melbourne to reach agreement with stevedores.

Meanwhile, a project to expand Webb Dock East so that two ships can berth at the same time at the Victorian International Container Terminal Ltd is scheduled for completion in 18 months.

Port authority: Port of Melbourne Pty Ltd, GPO Box 2149 Melbourne VIC 3001 Australia
Website: www.portofmelbourne.com
Email: www.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)

2

Throughput 2021: **2,861,197 teu**, **7.5%** (2020: 2,661,622 teu)

72 **Yokohama** (Japan)

Efforts are made to increase routes, with a new focus on South American services

A 7.5% rise in throughput to almost 2.9m teu in 2021 helped Yokohama port to recover from some of the volumes lost due to Covid issues.

Yet the main eastern Japanese port is still somewhat short of the nearly 3m teu level it had previously achieved.

Yokohama port attributed the rise to an increase in its traditional auto parts exports, after the industry recovered from the impact of Covid.

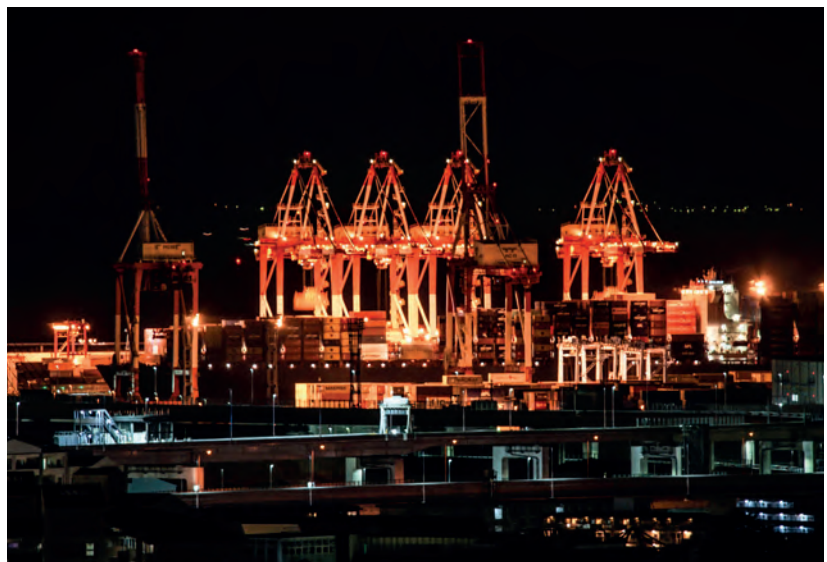
However, indications from the early part of 2022 suggest that despite its best efforts to boost its capabilities and build on its international container hub strategy, changes in shipping dynamics wrought by Covid may have turned the tide for good.

With nervous supply chains looking for alternatives to China, more production is moving to Southeast Asian centres.

This, in turn, might lead to a shift in liner strategy. For example, inventories from Vietnam, Thailand, Malaysia and China could be consolidated in Singapore or Malaysia instead.

Meanwhile, to its north, the possibility that Yokohama may pick up some regional transshipment business from competitors may be dashed by pure economics.

With a rapidly increasing



Yokohama: attempting to keep up with the changes.

Zoonar GmbH / Alamy Stock Photo

number of megaboxships coming on stream recently, the trend is towards the consolidation of boxes at mainland China ports before making the transpacific hop.

Nonetheless, the port is attempting to keep up with the changes.

Yokohama's berths MC1-MC4 at Minami-Honmoku Pier entered operation as a megaboxship-capable, integrated terminal run by APM Terminals during the year, helping to boost its capabilities.

In line with this, the global operator signed a 10-year deal

and the upgraded facility will grant flexibility to handle calls from all the major liner alliance members.

Yokohama port is now developing Shin-Honmoku Pier to enable it to accommodate larger container vessels and the accompanying higher volume.

After redevelopment to raise quay depth to 16 m and berth length to 400 m, the D4 and D5 terminals will be able to run integrated operations to handle 14,000 teu vessels smoothly.

Efforts have also been made to increase routes, with a new focus on South American

services. This came to fruition later in 2021, with the first call of a 14,000 teu ship on CMA CGM's ACSA1 Latin American service.

The port has a target of raising throughput to 3.4m teu by 2025, while boosting mainline routes to 20 and the number of routes serviced by megaboxships to six.

In 2021, Maersk started a new weekly service connecting Seattle, North America and Asia.

Investments have also been made in the terminals, with Taiwanese line Wan Hai signing a 10-year contract to lease the Honmoku D4 Terminal from 2026, taking over from CMA CGM.

Yet ultimately, changes in the production base of Yokohama's key Kanto region hinterland, as well as in international trade flows, will determine how the port falls into the new scheme of things.

Port authority: Port & Harbour Bureau, City of Yokohama, 6-50-10 Hon-cho, Naka-ku, Yokohama, 231-0005 Japan

Website: www.city.yokohama.lg.jp/lang/overseas/port/

Email: kw-portpromotion@city.yokohama.jp

Terminals (Operators):

Honmoku Pier:

Terminals BC, D1 (Yokohama Port Mega Terminal)

Terminal D4 (CMA CGM)

Terminal D5 (Under construction, to be announced)

Minami Honmoku Pier:

Terminal MC1 (APM Terminals/Nissin)

Terminal MC2 (APM Terminals/K Line/MOL)

Terminal MC3, 4 (APM Terminals)

Daikoku Pier

Terminal T9 (Mitsui-Soko)

2

Throughput 2021: **2,823,774 teu**, **↑ 6.7%** (2020: 2,647,066 teu)

73 Kobe (Japan)

Throughput picks up, thanks to the resumption of economic activities

KOBE port has been able to regain almost all the volumes it lost during the pandemic, with a 6.7% rise to more than 2.8m teu essentially bringing the western Japanese hub back to its 2019 numbers.

With the relatively focused role that it plays in the mainly intra-Asia trades into China, the port can rely on a certain base of traffic but will always be dependent on the vagaries of the Asian giant's trade and economic policies.

The port said throughput in 2021 picked up due to the resumption of economic activities, which saw a recovery in volumes of metal machinery and industrial products, such as industrial machinery and automobile parts.

Interestingly, for Kobe's trade with the Asia region and China in particular, the growth rate for imports outpaced exports, even though the absolute numbers still favoured exports.

In the case of China especially, the gap is closing quickly, with a 3.4% rise in exports to 416,614 teu compared to an 8.2% increase

in imports to 382,864 teu. This is reflective of broader trends, with Ministry of Finance figures showing Japan's containerised exports to China fell 5% in 2021, while imports rose 9%.

Port management also pointed to recent challenges in the international shipping market, such as port congestion and capacity shortages, and the resultant effects on global inflation as adding to the uncertainty facing Kobe port.

It also alluded to but did not elaborate on the effect of dropped calls on the overall numbers, as carriers struggled to restore schedules.

In response to supply chain disruptions caused by upset shipping schedules and space shortages, Kobe port sought to boost its deepsea network from western Japan by promoting itself as a feeder hub for the region.

The port was able to gain some market share from other ports on the Sea of Japan side with the opening of a new regular fixed schedule domestic feeder route connecting Tsuruga Port, Maizuru Port and Sakaiminato.

The port's inland container depot and schemes to better manage container allocation also helped alleviate the situation.

Kobe port remains undoubtedly the export hub of the huge manufacturing base in western Japan's Kansai region.

However, its reliance on traditional industries such as machinery and industrial manufacturing and auto parts and the vibrance of the China market may need to be re-evaluated, as recent trends point to an increasingly uncertain future.

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)

↑ 10

Throughput 2021: 2,813,920 teu, ↑ 30.6% (2020: 2,153,963 teu)

74 King Abdullah (Saudi Arabia)

Red Sea transshipment hub goes from strength to strength, with new intercontinental services helping annual traffic climb more than 30%

KING Abdullah Port has surged 10 places up the rankings on the 2021 box liftings count off the back of a record-breaking 12 months for the Saudi transshipment hub.

Volumes of 2.8m teu represented a more than 30% jump on the previous year — growth in percentage terms second only to China's Taicang in the One Hundred Ports rankings.

KAP, located nearly 100 km north of Jeddah, now sits among the top 75 container hubs globally — a feat all the more impressive considering box operations at the facility only commenced in 2013.

The port's success has drawn on its proximity to key domestic markets, including the sprawling Jeddah but also Al Madinah and Yanbu, while its strategic Red Sea location offers carrier customers traversing the east-west trades ample transshipment opportunities throughout the Gulf and the wider region.

KAP weathered the Covid storm better than most in 2020, thanks largely to the addition of two intercontinental services operated by Maersk and 2M alliance partner Mediterranean



King Abdullah: port's stellar performance propelled it up 10 places in the rankings.

KAP

Shipping Co, whose group affiliate, Terminal Investment Ltd, manages terminal operations on behalf of Saudi group, Ports Development Co.

In 2021, the full-year accumulation of business stemming from the 2M services was the key driver behind KAP's record handling figures.

Early indications suggest additional throughput gains for KAP in 2022, which will be further buoyed by the recent news of an extra port calling by Maersk's ME4 Westbound service connecting the Middle East with European markets.

KAP currently operates with a capacity of around 4.5m teu, but

there is plenty of room to grow. The port's masterplan shows capabilities of expanding this to as much as 25m teu, with KAP central to Saudi Arabia's ambition of becoming a global hub for maritime trade and logistics in efforts to diversify an oil-dependent economy.

KAP will be one to watch in the years ahead.

Port authority: Ports Development Company, 46 Entaj Building # 1, Industrial Valley, King Abdullah Economic City 23989, Jeddah 21582, Kingdom of Saudi Arabia

Website: www.kingabdullahport.com.sa

Email: info@portsdevco.com

Terminals (Operators):

National Container Terminal – South Terminal Berths 1-6 (Terminal Investment Ltd and Ports Development Co)

↑ 3

Throughput 2021: 2,761,648 teu, ↑ 9.5% (2020: 2,522,712 teu)

75 Sydney (Australia)

While protests by workers and climate activists continue to make headlines, the port's record throughput remains resilient

SYDNEY'S Port Botany posted a 9.5% rise in throughput in 2021, despite disruption from

industrial action and climate protests. The 2.7m teu handled was a record for the port, which

rose three places on this list. By comparison, Melbourne — Australia's biggest container

port — moved eight rungs down the rankings ladder, as throughput there fell to 2.9m teu.

“As a small and geographically remote market, we have felt the effects of global issues such as global container shortages, shipping disruptions and increased ocean freight rates,” wrote NSW Ports chief executive Marika Calfas, in December 2021.

“This has been compounded by local disruptions such as industrial action.”

Australia has not fared as badly as other countries from the supply chain chaos of 2021, but shipping rates were still up some 400% from before Covid.

However, Sydney, which saw bitter labour disputes in 2020, has had more disruptions because of climate protests.

In March 2022, protestors blocked road and rail lines servicing Port Botany on five occasions. One protestor, 26-year-old Maxim Curmi, climbed a 60 m crane on March 25 as part of efforts by Blockade Australia. He tied himself to the main arm of the top of the crane, temporarily shutting down a terminal and preventing a ship from loading. Mr Curmi was later sentenced to four months in prison, local media reported. The protests prompted tighter security measures and harsher penalties.

Meanwhile, in June 2022, NSW Ports, the private company that operates Botany and nearby Port Kembla, said almost 1,500 global seafarers had been vaccinated against Covid at Port Botany.

NSW Ports introduced an Empty Container Incentive Scheme in 2021 to reduce congestion from empties in Sydney, and said this helped load-to-discharge ratios.

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 (DP World Australia)

Hayes Dock (SICTL, Hutchison Ports Australia)

↗ 4

Throughput 2021: **2,751,442 teu**, ↗ **19.1%** (2020: 2,309,995 teu)

76 Charleston (United States)

The opening of a new container terminal adds 700,000 teu of capacity

THE opening of the first phase of the Hugh K Leatherman Container Terminal was a major achievement for the port of Charleston in 2021.

Another 700,000 teu of throughput capacity was added, as well as an additional berth.

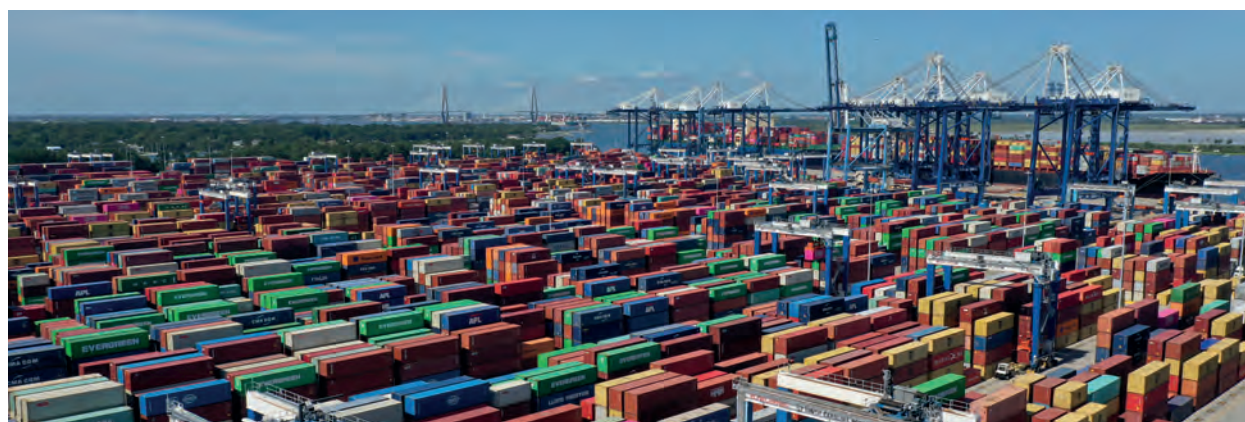
“We have invested in the

right infrastructure at the right time to handle growing cargo volumes and bigger ships, ensuring SC Ports remains a top 10 US container port,” said the South Carolina Ports Authority chief executive Jim Newsome.

The extra capacity is much needed, given the surge in imports to the US.

Hapag-Lloyd’s US-flag, 2002-built, 3,237 teu *Yorktown Express* — now the *Mirador Express* after an ownership change — marked the first ship call to the new facility.

At completion, the \$2bn Leatherman Terminal will have three berths and 286 acres, adding 2.4m teu of annual



Charleston: extra capacity is much needed, given the surge in imports to the US.

Walter Lagarenne / SCPA

throughput capacity, doubling the port's current level.

The Leatherman Terminal is part of a broader infrastructure investment plan, which also involves enhancing the existing Wando Welch Terminal.

In November 2021, the Wando Welch Terminal completed its fleet of 15 new ship-to-shore cranes.

The investments and new developments enable

Charleston to handle four 14,000 teu ships at the same time.

The port is reaping the reward of expanding during a difficult supply chain environment.

Throughput figures for the fourth quarter of 2021 were 16% higher than the previous year.

November 2021 was the busiest month of the year,

with 250,711 teu handled. The South Carolina Port Authority also hired more than 100 people to better support operations.

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)



Throughput 2021: **2,725,597 teu**, **↑ 10.3%** (2020: 2,471,146 teu)

77 Nagoya (Japan)

Japanese port continues to improve its facilities to keep up with current trends

NAGOYA port's 2021 performance was very similar to Japan's other main gateway port, Yokohama.

While throughput rose 10.3% to more than 2.7m teu, this was still below pre-Covid figures, suggesting the pandemic's effects are continuing to weigh on the economy.

Meanwhile, a similar pattern of imports outpacing exports was also evident. Overall, imports rose 11.2% to almost 1.4m teu, while exports rose 9.4% to more than 1.3m teu.

With China popping up in both ports' statistics as the main trading partner, both the composition and trend of container flows give an indication of what lies in store for their future.

Like Yokohama, Nagoya port serves a key industrial hinterland: the Chubu region — Japan's main production base for automobiles, machine tools, aerospace, steel and electrical machinery — and, critically, Aichi prefecture, the home of automaker Toyota.

Auto parts still comprised the bulk of Nagoya's exports

and rose 16.7%, followed by industrial machinery, which rose 17%.

Imports comprised mainly garments and footwear, auto parts and electrical machinery, the latter two jumping by 17% and 16%, respectively.

The port said exports rose due to an increase in auto parts and completed automobiles. Nagoya's exports to the US rose by almost one-fifth, mainly due to a bump in new car purchases.

However, a production cut at Toyota in the second half of 2021, due to a shortage of semiconductors and other parts from its Southeast Asian suppliers as a result of a Covid resurgence, put paid to its recovery plans and partly explains Nagoya's volumes falling short of its earlier levels.

Nagoya port continues to make improvements to keep up with current trends. Nabeta Pier Container Terminal's berth T3 has been fully automated and the remaining berths T1 and T2 are due to be automated by April 2024.

Tobishima Wharf is being

reconfigured to handle more ultra large container vessels. Berth R1 is having its water depth increased to 15 m and being made earthquake-resistant. It will be operational this year, while berth R2 will follow shortly after.

Trade with China and auto exports to the US hold the key to Nagoya's prospects. However, with a wide range of Covid policies and persistent supply chain problems continuing to impact on trade flows, the future remains uncertain.

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

↘ 5

Throughput 2021: **2,557,847 teu**, ↗ 8.7% (2020: 2,352,769 teu)

78 Genoa (Italy)

Italian port sees rise in container throughput despite Covid

THE coronavirus pandemic never happened in Genoa — at least as far as container throughput goes.

Volumes in 2021 hit more than 2.5m teu, up by 8.7% on 2020 to reach roughly pre-pandemic levels.

Of course, volumes rebounded in the absence of lockdowns and restrictions at the hands of the virus, but another key factor at work here was the opening of the Aponte-owned Bettolo-Genoa Mediterranean Gateway Terminal at the end of 2020, adding an a further 150,000 teu of capacity to the port.

There is room for expansion, too. Mediterranean Shipping Co, through its terminal arm Terminal Investment Ltd, is expected to push further

volumes through its affiliated terminal — and with it a slew of new services — as it looks to boost its regional presence in tandem with regional hub Gioia Tauro.

The Genoa port complex has traditionally positioned itself as primarily a gateway facility for industrialised northern Italy, rather than a transshipment point, and handles almost one-third of the Italian container market.

Yet despite being physically located in Italy, the port complex regards itself as being in competition with the north continent range, which dominates the European container trades.

Next year should see the opening of a rail link between Genoa and Rotterdam, which

the port authority's leadership believes will allow it to take 15%-20% of the Northern Europe domestic market.

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.

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):

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)

↗ 3

Throughput 2021: **2,486,425 teu**, ↗ 10.5% (2020: 2,250,827 teu)

79 Callao (Peru)

Peruvian port almost hits throughput of 2.5m teu, with DP World's terminal reaching 1.5m teu as expansion work begins, due for completion in 2024

THE port of Callao saw a significant increase in handling over 2020, achieving almost 2.5m teu in 2021, pushing it up three places in the rankings to 79th place.

Of this total, DP World handled a record 1.5m teu — the first time this milestone has been hit. The terminal operator now handles 62% of all containers at Callao.

In August 2021, DP World Callao started work on the

expansion of its Muelle Sur terminal, dubbed the 'Muelle Bicentenario Project'. The \$350m expansion will be ready in 2024.

The investment will cover 400 m of quay — from 650 m to 1,050 m — with an additional 40% yard capacity, totalling 40 ha when completed.

There will be three new quay cranes, four standard rubber-tired gantry cranes, 12 new

electric RTGs, and 20 new electric terminal tractor units.

DP World Callao claims this will be the first terminal in the world with this electric fleet.

There were no changes to liner routes in 2021.

APM Terminals covers the rest of the container throughput at its multipurpose Muelle Norte terminal.

Besides containers, the north terminal also handles fertilisers, grains, chemicals,



Callao: DP World is aiming to increase capacity at its Muelle Sur terminal to 2m teu.

rjankovsky / Alamy Stock Photo

coal, vegetables and fish oil. Callao is Peru's largest port, and lies close to the capital city, Lima. The port handles 70% of all general cargo movements through Peruvian ports.

As has been widely reported, Peru was badly hit by the Covid pandemic, suffering the highest death rate per capita in the world.

The pandemic depressed

trade through Callao in 2020, but the bounce-back in 2021 was strong, with Peru's real GDP growing by 13.3% for the year. This brought GDP back to pre-pandemic levels by the end of 2021.

The recovery was led by domestic demand, supported by the expansion of both public and private expenditure.

Prospects for the future look good, with the governor

of Peru's Central Reserve Bank forecasting that Peru's economic growth will outpace the rest of the Latin America region.

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)

5

Throughput 2021: **2,448,243 teu**, **↓ 0.5%** (2020: 2,461,262 teu)

80 Oakland (United States)

Supply chain disruptions continue to weigh on the port's throughput levels

THE knock-on effects of congestion kept Oakland's throughput growth rates in the red for the third year in a row.

The port started 2021 strongly, with March throughput volumes 27% higher than in 2020.

This momentum carried to June, but a slowdown in July broke the growth streak and saw the port underperforming compared to the previous year.

In that month, throughput volumes of 211,396 teu were recorded, down from 219,080 teu in 2020.

While August proved to be a bumper month, the numbers never recovered.

Oakland recorded throughput figures of 169,660 teu in December, down from 208,339 teu the previous year.

Still, in 2021, the port of Oakland recorded more than 1m teu of loaded imports,

the most handled in the port's 94-year history. Export volumes declined 8% year over year, due to such disruptions as late-arriving ships, cancelled voyages and weeks-long delays at some ports, which hampered freight movement.

Declining vessel traffic has also been an issue for the port. At the end of 2021, port officials said some liners were bypassing Oakland to avoid the severe delays seen

in southern California ports. Upgrades are under way to help improve the port's operations.

"Our emphasis now is on overcoming supply chain challenges that have hurt our export customers," said Port of Oakland's maritime director Bryan Brandes when announcing 2021's results.

In anticipation of larger ships and more cargo, Oakland has added eight ship-to-shore cranes and is looking to upgrade fenders and bollards.

The TraPac marine terminal has completed a \$67m expansion.

This has nearly doubled its fleet of ship-to-shore cranes and includes a new dock

for very large containerships.

Port authority: Port of Oakland, 530 Water Street, Oakland, CA 94607

Website: www.portofoakland.com

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)



Throughput 2021: **2,430,295 teu**, **↓ 6.4%** (2020: 2,595,402 teu)

81 Durban (South Africa)

Throughput declines amid civil unrest and a cyber attack knock operations at southern Africa's busiest port

THROUGHPUT at southern Africa's premier container port fell almost 7% in 2021 amid a cyber attack and civil unrest in and around Durban.

Pier 1 handled 689,246 teu, while pier 2 handled 1.7m teu, according to official figures by Transnet, the port authority.

Rioting and looting in July 2021, brought about by the jailing of former president Jacob Zuma, caused disruption at the port, with major shipping lines warning customers to expect delays as some depots and terminals were manned by skeleton staff.

During the same period, a cyber attack disrupted operations, forcing Transnet to shut down its automated Navis operating system, switching to a manual mode instead, which was said to be slow, leading to congestion.

Although some functionality was restored a few days later, force majeure remained in place until full recovery of the system.

In 2022, floods have caused widespread disruption at the facilities.

The port authority has once



Durban: port authority has again announced expansion plans.

Leon Swart / Alamy Stock Photo

again announced expansion plans — not just in Durban, and not just for containers. It also envisages boosting capacity at the Port Elizabeth terminals.

Transnet said the new Durban logistics hub, which is likely to take several years to complete, could potentially increase container capacity to 11.4m teu.

The "robust expansion programme" will be realised through the construction of new container terminals in the Point and Maydon Wharf port precincts, which will see a capacity rise of 1.8m teu and 1.6m teu, respectively.

Part of the works — which have been considered for several years already — will involve the

Salisbury Infill at Pier 1, which will expand terminal capacity to 3.6m teu, but requires a naval base to be moved to Richard's Bay.

Meanwhile, the berth-deepening project at Pier 2 is expected to enhance terminal capacity to 4.4m teu.

In the current financial year, R176m (\$10m) has been allocated to Durban for an expansion of the tug jetty.

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)

3

Throughput 2021: **2,425,638 teu**, **↑ 3.1%** (2020: 2,352,250 teu)

82 Osaka (Japan)

Japanese port is facing headwinds as greater uncertainties creep into the market

CONTAINER throughput at Osaka edged up 3% in 2021, after the initial shockwave of the coronavirus pandemic sent the key port in western Japan into contraction the previous year.

Yet the disruptions have lingered, despite a mild volume recovery.

In 2021, the Osaka Port and Harbor Bureau extended the payment of some port charges, such as port entry fees, in order to reduce the financial burden of Covid-hit companies.

Its statistics show that handling levels dropped 3% for the first five months of 2022.

The declines in April and May were steeper — 10% and 8%, respectively — led by a sharp fall in import containers.

That overlapped with the resurgence of domestic infections and the resulting

draconian lockdown measures in China, Japan's largest trading partner and Osaka's main source of overseas cargo.

The port is facing an "uncertain" macro picture amid the impact of high inflation on the global economy, said operator Kobe-Osaka International Port Corp in its business report published in late June 2022.

Measures are being taken to recover volume and increase the port's competitiveness. These include strengthening service networks and improving facilities.

For example, the port authority said it is working with the operator to broaden Osaka's access to the Southeast Asian markets, where cargo volume is growing rapidly. The port has also introduced a new port information system,

Container Fast Pass, designed to streamline cargo information flow and trim truck turnaround times.

The system, via smartphones with GPS, is distributed to truck drivers to allow them to share cargo status, gate congestion and location, among other important data.

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)

6

Throughput 2021: **2,221,900 teu**, **↑ 13.6%** (2020: 1,955,700 teu)

83 Jiaxing (China)

Improvements in sea-river transport service drives box volume growth

THE port of Jiaxing eventually hit its 2m teu throughput target in 2021. It saw an impressive performance, with a 13.6% increase in throughput, climbing six places up the rankings.

The port said it overcame the difficulties triggered by coronavirus by exploring the market in northern Zhejiang and tried very hard to solve the problem of container shortages

by co-ordinating resources from different parties.

As a feeder port situated between Shanghai and Ningbo — the world's largest and third-busiest ports, respectively — Jiaxing has benefited from the gains made by its two strong neighbours through collaborative projects.

In addition, Jiaxing continued to devote its energy to developing its prevailing

sea-river transport service — a key project promoted by the port to connect the wider hinterland alongside the Yangtze River and draw traffic from road transport — which handled 463,500 teu in 2021, up 27.8% from 2020.

It tried to expand the network of this service by adding new routes linking Jiaxing and Anhui province.

In September 2021, the local



Jiaying: prevailing sea-river transport service handled 463,500 teu, up 27.8% from 2020.

government set the target for sea-river transport volume at 1.6m teu by 2025 — a 300% growth trajectory compared with 2020.

Meanwhile, Jiaying port has also been actively

developing its international business, creating a new route connecting China and Russia.

However, the port fell victim to the coronavirus outbreak again in March 2022 and the efficiency of road transport

was greatly reduced by severe coronavirus-control measures for a while.

The port leveraged its advantage in the sea-river transport service to survive the crisis as road transport was disrupted by virus-control measures.

Meanwhile, it took over part of the cargo volume from Shanghai and Ningbo, both of which suffered from even more prolonged lockdowns.

The box throughput for the first five months of 2022 increased by about 24.9% year on year to almost 1.1m teu, forecasting another promising year.

Port authority: Jiaying Port and Shipping Administration Service Centre, No. 208, Wangjiayan Road, Zhapu Town, Pinghu City, Jiaying 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)

3

Throughput 2021: **2,163,151 teu**, **9.2%** (2020: 1,980,600 teu)

84 Guayaquil (Ecuador)

Ecuadorian hub eclipses 2m teu mark for 2021 despite increased competition from domestic rival

GUAYAQUIL, Ecuador's premier box hub, saw volumes climb nearly 10% in 2020, eclipsing the 2m teu mark in the process.

Throughput levels increased at both of its major terminals — Contecon Guayaquil, a subsidiary of Philippine port operator International Container Terminal Services Inc; and Seattle-based SAAM Marine's Terminal Portuaria Guayaquil — as business rebounded from the height

of the pandemic. The result is all the more impressive amid increased competition for Pacific Coast containerised trade in the region, particularly from domestic rival Posorja, home to DP World's new state-of-the-art box facility that sits around 100 km south of Guayaquil, on the north bank of the Guayas River delta.

TPG reported historic highs in liftings, with 542,000

containers — both 20 ft and 40 ft units — mobilised at its terminal in 2021.

The SAAM Marine facility responded to increasing demand for its services with the arrival of three new quay cranes in the first half of 2022, including one of the super-post-panamax form, while an additional four rubber-tyred gantry units will follow in December 2022.

ICTSI is also continuing

with the upgrade of Contecon Guayaquil — representing its largest concession in Central and South America — as it looks to enhance its capabilities in serving so-called ultra large boxships.

However, 2021 was also

significant for the terminal as it marked the handling of the world's first 'carbon-neutral-certified container shipment' from exporter to the port and distributor, involving a cargo of Ecuadorian bananas from local supplier TropicalFruit.

Port authority: Autoridad Portuaria de Guayaquil, Av de La Marina via Puerto Maritimo 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)

↘ 2

Throughput 2021: **2,122,903 teu**, ↘ **1.7%** (2020: 2,158,755 teu)

85 Yeosu Gwangyang (South Korea)

Fall in volumes slows at the jointly administered port as it unveils ambitious ESG targets

YEOSU Gwangyang slowed its fall in throughput in 2021 and released an ambitious set of environmental, social and governance targets.

Volumes at the jointly administered port fell 1.7% to just over 2.1m, having fallen 9.2% in 2020 and 1.3% the year before.

The Yeosu Gwangyang Port Authority announced an ESG strategy in 2021, which set goals on energy efficiency, social contributions, safety, anti-corruption and creating jobs for the underprivileged.

It produced 49% of its own energy in 2021 and hopes to become self-sufficient by 2030, according to the strategy. It marked no deaths for eight years in port construction and for three years in operations.

YGPA said it was looking at mobile wave power generation using batteries for electric vehicles, and sought a 40% increase in power generation efficiency.

The port is drawing up 'smart port plans' and taking inspiration from Rotterdam and Hamburg in how to automate or digitise different processes.

"We will quickly recover the damage caused by the pandemic with the local community and respond to the future port industry, and we will take the lead in the great paradigm shift in shipping and port logistics," YGPA said in its report.

The port said it recorded no Covid cases for two consecutive years and no port companies closed or entered bankruptcy.

Hutchison Ports Gwangyang has four berths (two 50,000 dwt and two 20,000 dwt), with a total length of 1,150 m and depth of 16 m.

From 2022, Korean ports expanded its Emissions Control Area rules, which make ships use 0.1% sulphur fuel.

Vessels anchored or berthed at the ports already had to follow the condition. However, scrubbers are allowed and there are no restrictions on discharge of washwater.

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)

↗ 5

Throughput 2021: **2,117,829 teu**, ↗ **10.1%** (2020: 1,924,000 teu)

86 Gdansk (Poland)

Polish port leapfrogs St Petersburg to lay claim as the Baltic's busiest box hub after reversing 2020's volume losses

POLAND'S premier port Gdansk nudged up five places in Lloyd's List's latest 100

rankings, clawing back volumes lost during the height of the pandemic to post record

handling figures for 2021. A jump of just over 10% to slightly over 2.1m teu helped

Gdansk climb to 86th position this time round, leapfrogging St Petersburg in the process to lay claim as the largest Baltic Sea box hub.

Container activities in Gdansk are centred at DCT Gdansk, or Deepwater Container Terminal Gdansk. The clue is in the name.

The facility allows for the furthest easterly port call in Northern Europe accessible to the world's largest container vessels, granting carriers plying the major east-west trades unrivalled proximity to key Baltic and eastern European markets.

Both the Ocean Alliance and 2M make weekly calls at DCT Gdansk — celebrating its 15th anniversary in 2022 — on their respective Asia-Europe offerings, while a host of feeder

operators work out of the port connecting local markets.

The latest addition is local operator Fields Line, linking the Baltic hub with western Latvia via a bi-weekly service.

The strength of its customer offering spawned a second terminal in 2016 — and, three years later, the interest of global port operating stalwart PSA International, adding the Polish facility to its terminal portfolio as part of a \$1.3bn takeover.

PSA is overseeing the development of DCT Gdansk's third terminal — which, if all goes to plan, will welcome its first commercial shipment in 2024.

Baltic Hub 3, as it is aptly named, will increase DCT Gdansk's capacity by a further 1.5m teu to 4.5m teu upon

completion, boasting a 700 m quay across a 36 ha site. The terminal will require an investment of approximately €500m (\$506m).

Gdansk's rapid expansion will only continue if PSA proves good on its pledge to elevate Gdansk as a major player in Northern Europe, one that can rival the long-established giant, be it Hamburg, Rotterdam or Antwerp.

Upon taking over box operations in Gdansk, PSA revealed it is looking to swell capacity to as much as 7m teu in the future.

Port authority: Port of Gdansk Authority SA, 18 Zamknieta Str, 80-955 Gdansk, Poland
Website: www.portgdansk.pl/en
Email: info@portgdansk.pl
Terminals (Operators): Deepwater Container Terminal Gdansk (PSA International)

3

Throughput 2021: 2,106,937 teu, 8.1% (2020: 1,948,700 teu)

87 Mersin (Turkey)

Turkish port begins an expansion project that will see it add 1m teu of handling capacity

TURKEY'S main Mediterranean gateway has continued with its uninhibited growth and is only poised for more as a landmark expansion edges closer to realisation.

Mersin, fully controlled by PSA through its subsidiary Mersin International Port, has slowly grown over the past decade to become a strategic hub in the eastern Mediterranean, with aspirations to play an even bigger role in the region.

In terms of port traffic, MIP acknowledged a drop-off in imports and a relative stagnation of exports but attributed the throughput increase to strong transshipment traffic and increased empty container



Mersin: helped by strong transshipment traffic and increased empty container positioning of shipping lines.

MIP

positioning of shipping lines. In 2021, MIP officially began work

on the highly publicised \$375m East Med Hub II expansion

project that will see the port's handling capacity expand from 2.6m teu to 3.6m teu.

It will allow the port to service two large containerships at the same time. The expansion is expected to be completed by the end of 2022.

In 2022, Mersin also became part of new services,

including one from Turkey to the US east coast launched by Hapag-Lloyd.

MIP also launched the 'Gates Project' in 2022, which will improve the connectivity of the port to the surrounding highway to prevent congestion and assist with handling operations.

The project includes several

features such as new bridges, new access roads and gates and automation systems.

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)

NEW

Throughput 2021: **2,091,132 teu**, **↑ 29.2%** (2020: 1,618,131 teu)

88 Taipei (Taiwan)

Congestion headwinds grow at the northern Taiwanese port

BENEFITING from the cargo volume shifted from Kaohsiung due to congestion, Taipei finished 2021 with an impressive 29.2% growth in container throughput.

However, in 2022, the port itself has fallen victim to the same headache.

In a customer advisory published on July 7, the Taipei Port Container Terminal said the average waiting time for ships has increased to two or three days, with vessels flocking to the port with disrupted schedules.

"As a result, our port is also facing congestion and delays

in container pick-ups and deliveries, which has seriously affected its operation," it said.

The terminal operator also told shipping companies it will reduce the lead time for container gate-in: three days for laden containers ahead of customs clearance; and three days for transshipment boxes before the vessel arrival date.

Taipei's handlings dropped 10.6% year on year to 754,326 teu for the first five months of 2022, according to government statistics.

The port positions itself as the cargo gateway in northern

Taiwan, as well as a green energy and logistics hub.

For that purpose, it plans to increase 1,038 ha of land by 2041 via reclamation to build expansion projects, including terminal, warehouse and wind-power facilities.

The creation of 471 ha of land, or 45% of the total, has been completed so far.

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):

Berths N3-N6 (Taipei Port Container Terminal)

↓ 4

Throughput 2021: **2,042,358 teu**, **↓ 2.7%** (2020: 2,099,649 teu)

89 St Petersburg (Russia)

Russia's largest container port sees a decline in box throughput, though a rise in total tonnage, thanks to bulk carriers and tankers

BETWEEN January and December 2021, the port of St Petersburg saw a throughput of just over 2m teu via its five container terminals, which represented a decline of 2.7%

compared to the box volumes handled in 2020.

Nevertheless, Russia's largest container port saw an increase in total tonnage throughput of 4% compared to the previous

year. This was chiefly driven by the bulk carrier and tanker sectors.

During 2021, the port completed several upgrades to its infrastructure in a

bid to modernise its port operations. The improvements included repairing railway and crane tracks, reconstructing pavements at its storage facilities and roads, and organising the construction of two new cargo yards.

The port also implemented a new unified information and logistics system for production control, with the aim of improving its organisation of handling operations, management of cargo flows and planning activities.

In addition, it rolled out a new container weight-measuring tool, which was integrated into the port's railway infrastructure to

improve the flow of trade and provide greater insight into port operations.

During 2021, a combined total of 918 containership calls were made at St Petersburg by major liner operators CMA CGM, Hapag-Lloyd, Maersk, MSC and Cosco/OOCL.

In addition, third-party feeder operators Samskip, Unifeeder and X-Press Feeders also provided regular services to St Petersburg in 2021. This compares to 1,048 boxship calls in 2020.

The ongoing Ukraine crisis has seen containership calls plummet at St Petersburg as sanctions on Russia, introduced in March, began to bite.

By June 2022, containership calls at St Petersburg had dropped to only 15% of the volumes handled before the Ukraine crisis.

Boxship calls since March 2022 have chiefly been for humanitarian cargoes or the restitution of empty containers.

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)

Petrolsport (Global Ports)

Ust-Luga Container Terminal (Global Ports 80%)

Moby Dik (Global Ports 75%)

Container Terminal Saint-Petersburg (UCL Holding)

7 4

Throughput 2021: **2,040,000 teu**, **7 10.9%** (2020: 1,840,000 teu)

90 Zhuhai (China)

Southern Chinese port regains some lost ground but prospects turn murky again in 2022

AS one of the key feeder ports on the Pearl River in southern China, in 2021, Zhuhai took back some ground lost in 2020.

The 10.9% increase in container throughput indicated that some of its efforts to reverse the volume losses had paid off.

The port saw rail-sea intermodal service volume up 39% year on year to more than 50,000 teu in 2021.

As part of the initiatives to better connect ports in the Greater Bay Area and reduce transit time, export cargo arriving in Zhuhai's Hong Wan terminal can now be cleared at local customs, shipped on a barge to Shenzhen's Shekou terminal and put directly on a larger boxship for overseas destinations.

However, prospects have turned murky again in 2022,

with handling volume down more than 50% for the first six months, according to data from the transport ministry.

This is perhaps not much of a surprise, given that all

the major ports it feeds — Shenzhen, Hong Kong and Guangzhou — were hit by contraction during the same period, after the domestic Covid flare-ups rattled the



Zhuhai: Covid flare-ups have again rattled the Pearl River Delta region.

Zhuhai Port Group

Pearl River Delta region, one of the China's largest economic and trade powerhouses.

The bleak outlook is also bringing about challenges to the port's new facilities.

The Phase Two project at Zhuhai International Container Terminals (Golan), a new container terminal with an

annual design capacity of 3m teu, was handed over in late 2021 to the operator, Zhuhai Port Group.

The company said it will step up efforts to introduce strategic partners for some of the Golan box terminals. That may offer risk-neutral investors an opportunity to buy low.

Port authority: Zhuhai Transport Bureau, No 62, Meihuaxi Rd, Xiangzhou District, Zhuhai City, PRC

Website: zhjt.zuhai.gov.cn

Email: zhjtjz@zuhai.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)

↗ 1

Throughput 2021: **2,027,000 teu**, ↗ 6.1% (2020: 1,911,000 teu)

91 Nantong (China)

After several years of growth, the port is hit by sporadic Covid outbreaks in the region

THROUGHPUT increases in Nantong slowed in 2021, following several years of burgeoning growth.

In 2022, a contraction even appears to be in prospect after coronavirus outbreaks occurred again in many places in China.

Among them, Shanghai and the nearby Jiangsu province were hit by a resurgence of local infections in April-May 2022, leading to clogged road transport and disrupted factory production.

As an important feeder port on the Yangtze River serving Shanghai, Nantong was certainly not immune to the fallout.

Its largest terminal, Nantong Tonghai Port Co, contributed about 70% of the total teu

handling last year. For the first six months of 2022, volumes at the facility dropped 8.3% from the year-ago period, according to Cosco Shipping, which controls the terminal.

In a press release in April, NTPC said amid escalating virus-control measures in the city, trucking services were congested, along with cargo turnover at checkpoints around the port area, causing reduced cargo transport efficiency.

Prospects in the second half of 2022 remain uncertain as sporadic Covid outbreaks continue in the region.

Meanwhile, expansion projects are being rolled out to pursue long-term growth at the port.

Nantong has been building a new port on the coastal side in order to gain direct access to seaborne traffic.

In December 2021, a new automated terminal at the so-called Tongzhou Bay port came into operation, with two megaship container berths and a pair of general cargo berths.

Throughput at Nantong envisaged by the local government will reach 13m teu in 2035.

Port authority: Nantong Port Authority, No.2 Chongwen Road, Nantong City, Jiangsu Province, China

Website: gwj.nantong.gov.cn

Email: ntgkjbs@163.com

Terminals (Operators):

Nantong Tonghai Terminal (Cosco Shipping Ports, Port of Nantong Co)

↘ 4

Throughput 2021: **2,010,900 teu**, ↗ 2.1% (2020: 1,970,000 teu)

92 Haikou (China)

Port seems to have lost its strategic position in the blueprints of Hainan province and Cosco Shipping

HAIKOU port has been working against multiple headwinds

since its neighbour Yangpu captured everyone's attention.

While box throughput has edged past the 2m benchmark,

it only went up 2.1% in 2021, following two years of stagnation.

The port appears to have lost its strategic position in the blueprints of Hainan province and Cosco Shipping, which invested in Haikou port in 2019.

Its biggest headache is the fierce competition from Yangpu, which is to the west of Haikou and is the core pillar of strategy in Hainan province.

Haikou also pales in comparison to its thriving neighbour in terms of box volume growth.

Priorities and resources have been given to Yangpu, which was positioned by Hainan province as “an international container hub port” facing the Indian Ocean

and Pacific Ocean markets. Meanwhile, Haikou was ordered to focus on cruise operations, passengerships, oil shipping, bulk shipments and containers, according to a government statement.

In September 2021, Cosco’s new South Asia route called at Yangpu rather than Haikou for transshipment.

The shipping giant also teamed up with Shandong Port Group and Beibu Gulf port to invest in Yangpu, aiming to make the port a “regional container shipping hub”.

Cargo was largely diverted from Haikou port to Yangpu’s Xiaochantan container terminal due to the Hainan province strategy.

Nevertheless, Haikou was still trying to bounce back.

It introduced new ways to simplify the process for owners to pick up their cargo. It streamlined the clearance procedures and allowed drivers to take trucks into the terminal and pick up the containers directly from the seashore.

It also launched an online booking system of its port services to avoid congestion.

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)

NEW

Throughput 2021: **2,004,302 teu**, **↗ 22.9%** (2020: 1,631,011 teu)

93 Kingston (Jamaica)

Jamaican transshipment hub returns to the rankings after a one-year hiatus as post-panamax credentials continue to draw services

KINGSTON marks its return to Lloyd’s List’s One Hundred Ports ladder — having narrowly missed the cut last time round — following a stellar year of growth for the Caribbean container hub.

Volumes for 2021 came in at a touch over 2m teu, representing a jump of close to 23% year on year, to ensure the Jamaican port’s absence from our listing proved short-lived.

Kingston comprises two terminals, including Kingston Wharves and the Kingston Freeport Terminal.

The latter handles the lion’s share of container traffic and is owned and operated by Terminal Link, a joint venture between CMA CGM and China Merchant Holdings.

CMA CGM took control of the facility in 2015 under a 30-year concession agreed alongside the Jamaican government, before it became part of the Terminal Link portfolio in 2020, as part of the deal that saw the French group dispose of stakes in eight terminal assets to its Chinese partner.

Despite the deal, Kingston remains CMA CGM’s hub port for the Central American and Caribbean, utilising the transshipment opportunities in the region provided by the expanded Panama Canal.

Upgrades to the terminal have ensured post-panamax ships of 10,000-plus teu routinely call Kingston, while a slew of new services have arrived since CMA CGM’s arrival.

Indeed, the addition of a

further regular call in 2021 was the key factor behind Kingston’s significant uptick in box business beyond the volume rebound attributable to the pandemic, according to the Kingston Port Authority.

Yet as KPTL goes from strength to strength, so too does the smaller KWL, which also achieved a volume hike in 2021, buoyed by an uptick in domestic trade.

KWL also marked 2021 with the \$30m upgrade of the port’s Berth 7.

Port authority: The Port Authority of Jamaica, 15 -17 Duke Street, Kingston, Jamaica

Website: www.portjam.com

Email: paj@portjam.com

Terminals (Operators):

Kingston Freeport Terminal (Terminal Link: CMA CGM and China Merchant Holdings)

Kingston Wharves Terminal

(Kingston Wharves Ltd)

7 1

Throughput 2021: 1,979,222 teu, ↑ 8.7% (2020: 1,821,000 teu)

94 Taichung (Taiwan)

Growth momentum stalls amid a flare-up of domestic Covid infections

IN 2021, congestion at Kaohsiung port in southern Taiwan led to it losing some cargo volume to Taipei on the north coast of the self-governing island.

The shift also benefited Taichung, which sits in the middle. Container throughput at the port increased by 8.7% year on year.

In December 2021, Wan Hai Lines, one of the box terminal operators, also installed a new quay crane at the number 34 berth to improve the handling efficiency and reduce vessel waiting time.

However, the growth momentum stalled in 2022, with box-handling levels down by 4.6% for the first five months amid the flare-up of domestic Covid infections.

The decline also overlaps with the lockdown measures implemented on mainland China, Taiwan's largest trading partner, and the resulting logistics disruptions and economic slowdown, which may also have impacted Taichung's services.

Meanwhile, Taichung is launching an online booking platform, BoniGO, for

container pick-ups and deliveries to smooth out the operations and save time for truck drivers.

The system will enable the sharing of information between carriers, storage yards, shippers and drivers.

Port authority: Port of Taichung, Taiwan International Ports Corporation: No. 2 Sec 10, Taiwan Boulevard, Wu-Chi District, Taichung, Taiwan

Website: tc.twport.com.tw/en

Email: shyongss@twport.com.tw

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)

7 2

Throughput 2021: 1,967,946 teu, ↑ 9.3% (2020: 1,800,642 teu)

95 Kocaeli (Turkey)

Turkish port continues its steady growth in volumes with its third Top 100 ranking

KOCAELI, also known as Izmit, makes its third appearance in these One Hundred Ports rankings in 2021.

The Turkish port, about 60 km east of Istanbul, saw throughput rise from 1.8m teu in 2020 to 1.9m teu, a 9.3% increase.

Its six terminals, dotted along the Izmit Bay coastline, handle domestic and deepsea trade.

Turkey's global port operator Yilport runs the flagship Yilport Gebze Container Terminal, while Evyap Group's Evyaport Container Terminal and DP World Yarimca round out the top three.

They host major carrier



Kocaeli: terminals host major carrier alliances serving the eastern Mediterranean.

Mehmet Kalkan / Alamy Stock Photo

alliances serving the eastern Mediterranean: 2M, The Alliance and Ocean Alliance.

They have continued to prosper in 2022, with 997,697 teu handled in the Kocaeli Port Authority area between January and May, up 13.8%.

General cargo handling rose to 35.2m tonnes in the same

period, 3.4% higher than the period before.

In April 2022, Hapag-Lloyd said it would launch a new service linking the Turkish ports of Izmit, Aliaga and Mersin with the US east coast ports of New York, Norfolk and Savannah, plus a stop at the Mediterranean hub of Tangier.

In June 2022, Turkey's transport and infrastructure minister, Adil Karaismailoğlu, said the government would ensure the Izmit ports were expanded and developed as trade grew, especially to handle bigger ships.

DP World Yarımca, which has annual capacity of more than 1.1m teu and can berth four vessels at a time, said it

helped deliver supplies when fires struck southwest Turkey in August 2021.

It also started a new Tanger-Caspian route, connecting Turkey with Central Asia.

In 2021, Yilport added 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 Yarımca-Körfez KOCAEL

Website: kocaeliliman.uab.gov.tr

Email: kocaeli.liman@uab.gov.tr

Terminals (Operators):

Yilport Gebze Container Terminal (Yilport)

Evyaport Container Terminal (EVYAP)

DP World Yarımca (DP World)

Belde Port Terminal (MED Lojistik)

Safi Derince International Port (Safi Holding)

Limaş Terminal (Hayat Holding)

2

Throughput 2021: **1,962,304 teu**, **13.7%** (2020: 1,725,270 teu)

96 Lomé (Togo)

Togolese box hub maintains top 100 standing with another year of double-digit volume growth

TOGO'S port of Lomé cemented its place in the One Hundred Ports list following a stellar 2021 performance.

The West African port, the region's sole representation, made its rankings debut last year and jumps two places, having boosted box liftings by double-digit percentiles for a second consecutive year.

Although the Gulf of Guinea port failed to attain the 2m teu barrier in 2021, volumes chalked up of 1.9m teu represented a 13.7% uptick over 2020.

Central to Lomé's rise to prominence was 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, since 2014.

Although volumes were slow to get off the ground, LCT is making up for lost time, with business accelerating in recent years, thanks largely to the contribution of its core client MSC.

The Geneva-based line has made LCT its preferred destination in West Africa, connecting Togo's coastline with landlocked



Lomé: MSC's move to make the port its preferred destination in West Africa has elevated its regional status.

LCT

Mali, Niger, and Burkina Faso, while offering transshipment opportunities to the wider region.

MSC, through its terminal affiliate TIL, is continuing to invest in the facility as it ramps up operations at the terminal.

Plans through to the end of the decade are to pledge as much as €500m (\$530m), which will nearly double its current capacity to around 4m teu.

So far in 2022, LCT has made significant strides in upgrading its fleet of handling equipment, acquiring two mobile cranes and 10 container trucks to boost capacity.

Lomé's other terminal is the aptly named Togo Terminal, operated by regional port specialist Bolloré Ports, which

MSC acquired as part of a \$6.3bn deal to acquire all Bolloré Group's shipping, logistics and terminal operations in Africa earlier in 2022.

MSC group president Diego Aponte has been quick to allay concerns locally that the deal would effectively monopolise port operations in Lomé.

He told reporters that the two terminals will remain "operationally independent" and that the two entities will "not face but complement each other".

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)

16

Throughput 2021: **1,954,300 teu**, **↓ 13.5%** (2020: 2,260,000 teu)

97 Quanzhou (China)

Facing fierce competition from Xiamen and Fuzhou, the port is given little breathing room to develop

QUANZHOU port's container throughput has fallen for two years in a row.

The box volume dropped dramatically by 13.5% year on year in Quanzhou port, while the much bigger neighbours Xiamen and Fuzhou — both several tens of places ahead of it in the rankings — have seen robust growth.

Facing fierce competition from Xiamen and Fuzhou, Quanzhou was given little breathing room to develop.

In early 2021, Fujian province said in a statement that it had officially assigned the role for Quanzhou port as “a container port focusing on domestic trade”, while Xiamen was positioned as its principal container shipping hub.

Separately, Quanzhou has traversed other potholes along the way.

Low salaries of truck drivers and rising oil prices led to a strike covering almost

all truck drivers in the city in June 2021.

Quanzhou, which is mainly involved in domestic feeder services and depends heavily on the national economic environment, was also impacted by Covid-control measures. In August and September 2021, the city reported a new outbreak of coronavirus. As a result, the port conducted several rounds of swab test screening for its port workers and strictly restricted their movements.

However, the ancient Chinese port city of Quanzhou — once the starting point for a trading route known as the Maritime Silk Road — has never given up the hope of thriving again.

Quanzhou provided financial support for local shipping companies to overcome the pandemic-induced difficulties and gain more fresh capacity.

The local transport bureau said it had planned to spend

Yuan1.48bn (\$22.1m) on the construction of new berths and waterways in 2021.

Quanzhou also reopened the container shipping business at its subsidiary port, Xiaocuo, which had been temporarily shut down in 2018 due to business restructuring.

With the Regional Comprehensive Economic Partnership officially taking effect in early 2022 and reduced trade tariffs, Quanzhou aims to seize the opportunity to facilitate commercial engagement with member countries, according to a statement by Quanzhou port.

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)

2

Throughput 2021: **1,871,081 teu**, **↑ 3.4%** (2020: 1,809,237 teu)

98 Southampton (United Kingdom)

The UK's third-largest container port halts several years of modest decline

SOUTHAMPTON reversed several years of decline in container volumes during 2021 as parent company DP World continued to invest in both the south of England facility and its London Gateway site on the River Thames.

One of the UK's premier

container terminals is now heading back to the 2m teu it was handling annually a few years ago, supported by a £40m (\$50m) investment programme and the benefit of joint management with London Gateway that enables the pair to offer customers choice.

Combined, DP World's UK container ports handled a record volume in 2021, with London Gateway's throughput now almost matching Southampton's.

Crucially, despite a difficult year for container ports across the world amid unprecedented

levels of congestion that severely disrupted sailing schedules, neither Southampton nor London Gateway ever suffered from the crippling logjams that hit some other facilities, according to DP World.

Both were able to operate within normal parameters and function effectively, even though they were exceptionally busy.

Upgrades included the delivery of 11 straddle carriers that are described as the most sustainable yet manufactured, with fuel consumption around 20% less than for the diesel-electric-powered machines they have replaced.

In June 2022, DP World said its Southampton terminal had become the first port in Britain to eliminate fossil diesel from its operations entirely and transition to

hydrotreated vegetable oil. Berths have been dredged and widened to accommodate the world's biggest ships, while other investments include a new £3m park for empty containers that opened in September 2021. The ultimate aim is to take Southampton up to the next level as a smart logistics hub and provide customers with speed, security, reliability and flexibility, according to Ernst Schulze, DP World's UK chief executive.

Amid the furore surrounding the dismissal of some 800 UK seafarers by DP World subsidiary P&O Ferries, DP World Southampton stepped down from the board of Solent Freeport, a consortium bidding to establish a freeport in the Southampton area.

Nevertheless, the container terminal still expects to benefit from the extra traffic that

should be attracted to the port of Southampton by the freeport.

Although volumes are now considerably higher than a decade ago, Southampton has slipped down the league table as other ports grew more rapidly. In 2021, it was ranked 98th in the world. That compares with 78th position exactly 10 years earlier.

The Dubai ports group gained full control of DP World Southampton in 2015, when its joint venture with Southampton port owner ABP ended.

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

Terminals (Operators):
DP World Southampton (DP World)

NEW

Throughput 2021: **1,840,458 teu**, **↑ 17.1%** (2020: 1,571,274 teu)

99 San Antonio (Chile)

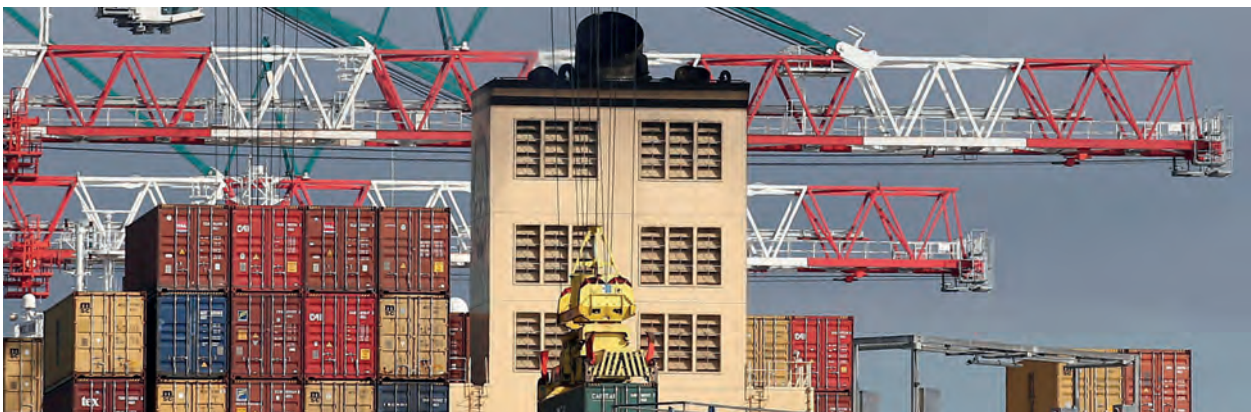
Chilean port increases throughput and is pushing towards 2m teu

THE steady advance of container throughput at San Antonio, Chile's largest multipurpose port, over the past decade has seen

the DP World facility break into the Top 100 Ports this year.

San Antonio is situated in the Valparaíso region, the country's

second-most populated administrative division, and little more than an hour's drive from the Santiago Metropolitan



San Antonio: situated close to Chile's industrial and agricultural heartland, the port has made good use of an ambitious investment plan.

Reuters / Alamy Stock Photo

region, the country's capital and largest industrial base.

Development of the Costanera berthing facility started in 2011. The ambitious investment plan included the construction of a 700 m-long quayside, among other investments.

At the time, it was the largest development of its kind ever carried out in Chile.

In its first year of operation, San Antonio handled just over 1m teu, and progress has been continuous, with the exception of the 2014 financial crash and the 2020 Covid pandemic.

By 2018, the 1.5m teu

throughput milestone was reached, rising to more than 1.8m teu in 2021.

San Antonio now has three concession terminals: DP World San Antonio, San Antonio International Terminal and Panul Bulk Terminal.

The port's contribution to the Valparaiso region's container throughput has helped to push the total volume of cargo through the region's ports to 34.4m tonnes, of which 76% is now in containers.

DP World San Antonio's main liner operators include Hapag-Lloyd, MSC and CMA CGM.

In its annual statement, DP World observed that 2021 was a year of regional recovery after a year in 2020 hit by the effects of the pandemic, mainly led by imports.

Regional volume growth reached 13.4% in total and 14% in teu, with DP World San Antonio raising volume by 15% and teu by 21%.

Port authority: Puerto Central, Alan Macowan 240, San Antonio, Chile
Website: www.dpworldsanantonio.cl
Email: contacto.sanantonio@dpworld.com
Terminals (Operators):
 DP World San Antonio (DP World)

— NO CHANGE

Throughput 2021: **1,830,000 teu**, **↑ 11.4%** (2020: 1,643,000 teu)

100 Jinzhou (China)

Northern Chinese feeder port enjoys a quick rebound before contraction resumes in 2022 as the country is swept by a flare-up of coronavirus infections

AFTER experiencing a double-digit decline in 2020, container throughput at the port of Jinzhou was quickly perked up in 2021 by strong demand for exports and domestic trade.

In August 2021, Jinzhou even launched its first direct overseas service since 1990, which is when the rebuilt feeder port in northern China, close to Dalian, began operating in its modern history.

Using a 2,400 teu vessel, *Hui Fa*, the containers were hauled directly to Russia's Vostochny port in the Far East, then transhipped via rail to various ports in Europe, including Malaszewiczevia in Poland, Duisburg and Hamburg in Germany, Rotterdam in the Netherlands and Antwerp in Belgium.

However, Lloyd's List Intelligence data shows the vessel never returned to Jinzhou and has since been travelling between Vostochny, South

Korea's Busan and other Chinese ports.

Jinzhou Port Co, the main operator at the port, said on its official website that cargo can reach foreign destinations via transshipment through Dalian and Tianjin.

Most of its services still target domestic markets, with a focus on the southern parts of the country, especially Shanghai, Fujian and Guangdong.

As a large commodity trading hub, some of its dry bulker cargo, such as coal and grains, is also shipped via containers on coastal routes.

With the country being swept by a flare-up of coronavirus infections in 2022, Jinzhou suffered, too.

Box throughput for the first five months dropped 9% year on year, according to the latest available data from China's transport ministry.

Handling levels at 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 — were still growing at more than 20% in the first quarter.

However, the subsequent 38.6% and 18.9% contractions in April and May, respectively, completely reversed the trend.

Volumes in June are expected to recover after Beijing stepped up efforts to alleviate the lockdown impact and stimulate the economy.

Yet prospects remain uncertain as the Covid fallout and slowdown in the country appear far from being over.

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 2021

| | Port | 2021 annual throughput (teu) | % +/- | | Port | 2021 annual throughput (teu) | % +/- |
|-----|------------------------|------------------------------|---------|----|--------------------------|------------------------------|---------|
| 57 | Abu Dhabi | 3,440,000 | ↗ 6.8% | 59 | Manzanillo | 3,371,400 | ↗ 15.9% |
| 42 | Algeciras | 4,799,497 | ↘ 6.0% | 69 | Marsaxlokk | 2,967,765 | ↗ 21.6% |
| 70 | Ambarli | 2,942,550 | ↗ 1.9% | 71 | Melbourne | 2,909,288 | ↘ 2.9% |
| 14 | Antwerp | 12,020,000 | ↘ 0.1% | 87 | Mersin | 2,106,937 | ↗ 8.1% |
| 53 | Balboa | 3,561,432 | ↗ 12.6% | 27 | Mundra | 6,660,000 | ↗ 17.7% |
| 54 | Barcelona | 3,531,762 | ↗ 19.4% | 77 | Nagoya | 2,725,597 | ↗ 10.3% |
| 37 | Bremen/ Bremerhaven | 5,018,900 | ↗ 5.3% | 67 | Nanjing | 3,109,800 | ↗ 3.0% |
| 7 | Busan | 22,706,130 | ↗ 4.0% | 91 | Nantong | 2,027,000 | ↗ 6.1% |
| 32 | Cai Mep | 5,385,289 | ↗ 22.1% | 19 | New York / New Jersey | 8,985,929 | ↗ 18.5% |
| 79 | Callao | 2,486,425 | ↗ 10.5% | 3 | Ningbo-Zhoushan | 31,070,000 | ↗ 8.2% |
| 61 | Cartagena | 3,343,810 | ↗ 6.9% | 80 | Oakland | 2,448,243 | ↘ 0.5% |
| 76 | Charleston | 2,751,442 | ↗ 19.1% | 82 | Osaka | 2,425,638 | ↗ 3.1% |
| 64 | Chittagong | 3,214,548 | ↗ 13.2% | 33 | Piraeus | 5,311,810 | ↘ 2.3% |
| 23 | Colombo | 7,250,000 | ↗ 5.8% | 12 | Port Klang | 13,724,460 | ↗ 3.6% |
| 39 | Colón | 4,915,975 | ↗ 10.3% | 43 | Port Said | 4,764,583 | ↗ 18.8% |
| 51 | Dalian | 3,672,000 | ↘ 28.1% | 6 | Qingdao | 23,710,000 | ↗ 7.7% |
| 58 | Dongguan | 3,400,000 | ↘ 0.6% | 44 | Qinzhou | 4,630,000 | ↗ 17.2% |
| 11 | Dubai | 13,742,000 | ↗ 1.9% | 97 | Quanzhou | 1,954,300 | ↘ 13.5% |
| 81 | Durban | 2,430,295 | ↘ 6.4% | 35 | Rizhao | 5,174,220 | ↗ 6.5% |
| 49 | Felixstowe* | 3,700,000 | ↗ 5.7% | 10 | Rotterdam | 15,300,000 | ↗ 6.6% |
| 62 | Fuzhou | 3,292,300 | ↘ 6.5% | 45 | Salalah | 4,510,000 | ↗ 3.9% |
| 86 | Gdansk | 2,117,829 | ↗ 10.1% | 99 | San Antonio | 1,840,458 | ↗ 17.1% |
| 78 | Genoa | 2,557,847 | ↗ 8.7% | 41 | Santos | 4,831,972 | ↗ 14.2% |
| 65 | Gioia Tauro | 3,146,553 | ↘ 1.5% | 30 | Savannah | 5,613,163 | ↗ 19.9% |
| 5 | Guangzhou | 24,180,000 | ↗ 2.9% | 48 | Seattle / Tacoma | 3,736,206 | ↗ 12.5% |
| 84 | Guayaquil | 2,163,151 | ↗ 9.2% | 1 | Shanghai | 47,030,300 | ↗ 8.1% |
| 28 | Hai Phong | 5,695,839 | ↗ 10.8% | 4 | Shenzhen | 28,767,600 | ↗ 8.4% |
| 92 | Haikou | 2,010,900 | ↗ 2.1% | 2 | Singapore | 37,470,000 | ↗ 1.6% |
| 20 | Hamburg | 8,715,000 | ↗ 2.0% | 98 | Southampton | 1,871,081 | ↗ 3.4% |
| 22 | Ho Chi Minh City | 7,956,133 | ↗ 1.3% | 89 | St Petersburg | 2,042,358 | ↘ 2.7% |
| 9 | Hong Kong | 17,798,000 | ↘ 0.9% | 75 | Sydney | 2,761,648 | ↗ 9.5% |
| 56 | Houston | 3,453,220 | ↗ 15.1% | 25 | Taicang | 7,037,900 | ↗ 35.0% |
| 60 | Incheon | 3,353,781 | ↗ 2.5% | 94 | Taichung | 1,979,222 | ↗ 8.7% |
| 29 | Jawaharlal Nehru | 5,630,000 | ↗ 26.0% | 88 | Taipei | 2,091,132 | ↗ 29.2% |
| 40 | Jeddah | 4,882,342 | ↗ 3.1% | 24 | Tanger Med | 7,173,870 | ↗ 24.3% |
| 83 | Jiaxing | 2,221,900 | ↗ 13.6% | 63 | Tangshan | 3,293,000 | ↗ 5.5% |
| 100 | Jinzhou | 1,830,000 | ↗ 11.4% | 15 | Tanjung Pelepas | 11,200,000 | ↗ 14.3% |
| 17 | Kaohsiung | 9,864,448 | ↗ 2.5% | 47 | Tanjung Perak | 3,901,215 | ↗ 8.3% |
| 74 | King Abdullah | 2,813,920 | ↗ 30.6% | 26 | Tanjung Priok | 6,849,227 | ↗ 11.7% |
| 93 | Kingston | 2,004,302 | ↗ 22.9% | 8 | Tianjin | 20,269,400 | ↗ 10.4% |
| 73 | Kobe | 2,823,774 | ↗ 6.7% | 46 | Tokyo | 4,325,956 | ↗ 1.6% |
| 95 | Kocaeli | 1,967,946 | ↗ 9.3% | 31 | Valencia | 5,604,478 | ↗ 3.2% |
| 21 | Laem Chabang | 8,335,384 | ↗ 9.7% | 50 | Vancouver | 3,678,952 | ↗ 6.1% |
| 68 | Le Havre | 3,018,550 | ↗ 28.1% | 55 | Virginia | 3,522,834 | ↗ 25.2% |
| 36 | Lianyungang | 5,090,000 | ↗ 6.0% | 13 | Xiamen | 12,045,700 | ↗ 5.6% |
| 96 | Lomé | 1,962,304 | ↗ 13.7% | 52 | Yantai | 3,651,000 | ↗ 10.6% |
| 66 | London | 3,111,000 | ↗ 12.2% | 85 | Yeosu Gwangyang | 2,122,903 | ↘ 1.7% |
| 18 | Long Beach | 9,384,368 | ↗ 15.7% | 34 | Yingkou | 5,207,000 | ↘ 7.8% |
| 16 | Los Angeles | 10,677,610 | ↗ 15.9% | 72 | Yokohama | 2,861,197 | ↗ 7.5% |
| 38 | Manila | 4,976,014 | ↗ 12.0% | 90 | Zhuhai | 2,040,000 | ↗ 10.9% |

*estimated figure

Lloyd's List

ONE HUNDRED PORTS 2022

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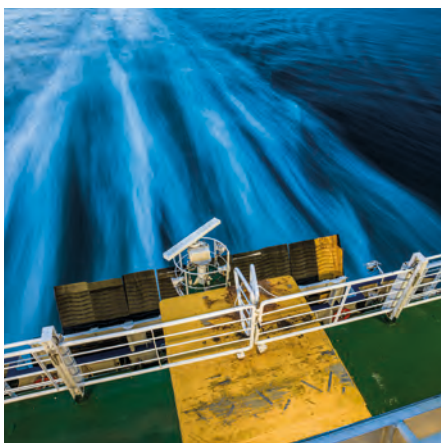
P&O Ferries is transforming the process of importing and exporting goods from the UK for the better – even after Brexit. Here's how



Shipping sea freight is becoming easier as end-to-end logistics evolve, with streamlined solutions boosting visibility, easing border crossings and keeping costs low for consumers.

However, with new regulations coming into force as Britain leaves the EU, there is concern that this progress will be reversed. Combined with ongoing instability in the wake of the pandemic, it seems costly delays at UK ports could become commonplace.

Unless, of course, you can find solutions that not only foresee future shipping disruptions – but fix them.



One-click trucking

Sea freight experts P&O Ferries are keeping goods flowing around the UK and Europe, pre- and post-Brexit, with three new solutions. The first is their [Digital Travel Wallet \(DTW\)](#) - a free app that simplifies the check-in process for drivers at ports.

Using basic questions, DTW identifies the documents required for any shipment based on the route and type of cargo. Users then verify and upload documents, generating one barcode that drivers can use to scan and go at the port - reducing check-in times by 50%.

One-stop customs shop

Creating a synchronised experience throughout a cargo's journey, P&O Ferries have also created Customs Clearance Service (CCS).

Designed with UK customs in mind, this secure smart app provides a centralised place for users to pre-pay duty and confirm import and export clearance before reaching a port. This prevents unnecessary searches so goods can pass through customs without stopping.

Importantly, CCS also offers agility, automatically updating in line with future regulations so users are never caught short.

One team, greater service

Streamlining the terminal process is pointless if there is no ferry ability for processed goods. Luckily, P&O Ferries have thought of that too.

Partnering with DFDS, these leading ferry operators are making their Dover-Calais ships available to one another under The Space Charter Agreement (SCA). This will diversify the options available on the UK-EU trade route, boosting supply chain resilience and regularity of services.

The SCA will also reduce waiting times at ports, offering departures every 36 minutes and cutting gate-to-gate journey times by an estimated 30 minutes.

Visit www.pofreight.com today to find out more.