Ports & Terminals Insight Supplement

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Ports & Terminals Insight Supplement

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Monthly Analysis of the Ports & Terminals Market

Executive summary

Global Container Port Throughput Index improved 1.9% MoM in September 2023

Performance deteriorated slightly with an increase in other duration; overall volumes are expected to have plunged 8.4% in October 2023 as indicated by Drewry's Nowcasting Model.

	Throughput	Port calls	Waiting	Terminal time
Global	3.7% YoY	-1.9% YoY	1.9% MoM Negative	1.0% MoM Negative
Greater China	6.3% YoY	-6.6% YoY	-4.3% MoM Positive	-2.7% MoM Positive
Asia (excl. China)	7.4% YoY	-2.1% YoY	1.2% MoM Negative	0.4% MoM Neutral
North America	-1.5% YoY	2.1% YoY	9.8% MoM Negative	-0.7% MoM Neutral
Europe	-0.7% YoY	-0.9% YoY	-13.3% MoM Positive	1.7% MoM Negative
Middle East & South Asia	5.5% YoY	-2.0% YoY	22.2% MoM Negative	1.6% MoM Negative
Latin America	0.1% YoY	2.9% YoY	8.7% MoM Negative	1.9% MoM Negative
Oceania	-8.1% YoY	-5.7% YoY	8.4% MoM Negative	7.7% MoM Negative
Africa	-8.0% YoY	5.6% YoY	9.4% MoM Negative	-3.7% MoM Positive

Note: YoY throughput performance to 30 September 2023, YoY Port calls, Waiting and Terminal time to 31 October 2023

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Spotlight analysis

Recent Los Angeles & Long Beach volume recovery is likely to be temporary

Latest GDP growth figures not reflected in US Manufacturing PMI which suggests continued weak demand in the container market.

The primary US container ports of Los Angeles and Long Beach have had a difficult few years.

In 2021, a post-Covid surge in volumes led to large-scale congestion, with average pre-berthing delays of up to 12 days in the last months of that year. These delays were gradually improved in 2022, finally coming under control in the middle of the year as volumes came down from their highs.

Volumes continued to soften

throughout 2H22 and into 2023, with weak demand amid a protracted destocking process leading to a slump in throughput – both ports reported 20% lower throughput YoY for the first nine months of this year.

US GDP data shows that the overall economy has fared better than other advanced economies, certainly better than the other G7 nations, with positive growth in 2H22 and continuing throughout 2023.

However, the US Manufacturing PMI data (collated by the Institute of Supply Management) paints a different picture. The PMI is a useful leading indicator of economic activity - when the index is below 50 it suggests a contraction in the sector.

With the US Manufacturing PMI staying stubbornly below 50 since November 2022, this suggests volumes at the primary ports will remain subdued for some months yet.

Comparison of LA/LB throughput with US manufacturing PMI
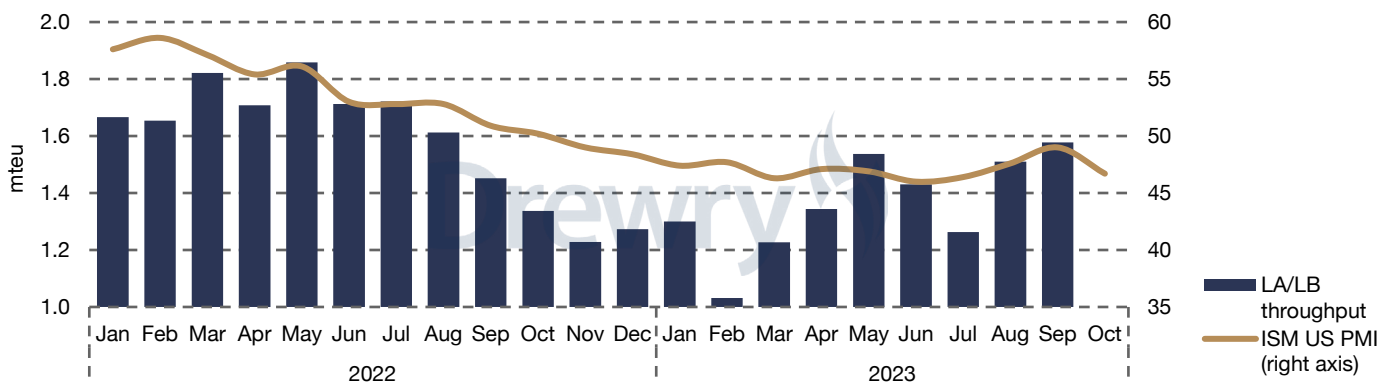
Source: Drewry Maritime Research, Institute for Supply Management

Port volumes at Los Angeles / Long Beach by month
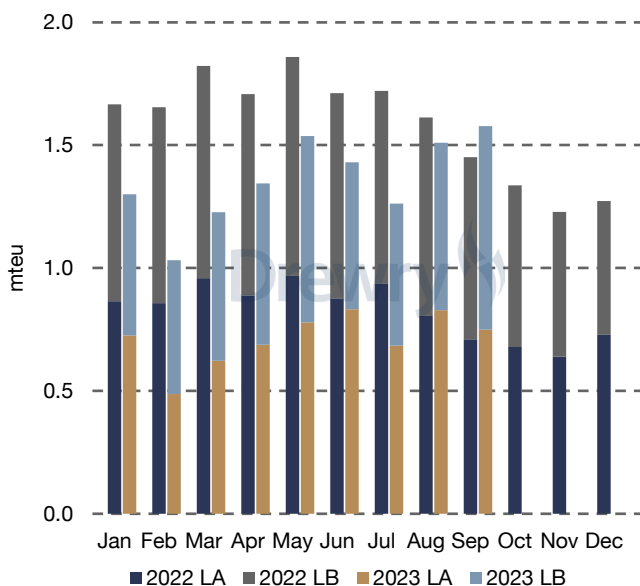
Source: Drewry Maritime Research

US GDP growth

Source: Drewry Maritime Research, Bureau of Economics, US Department of Commerce

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Global ports monitor

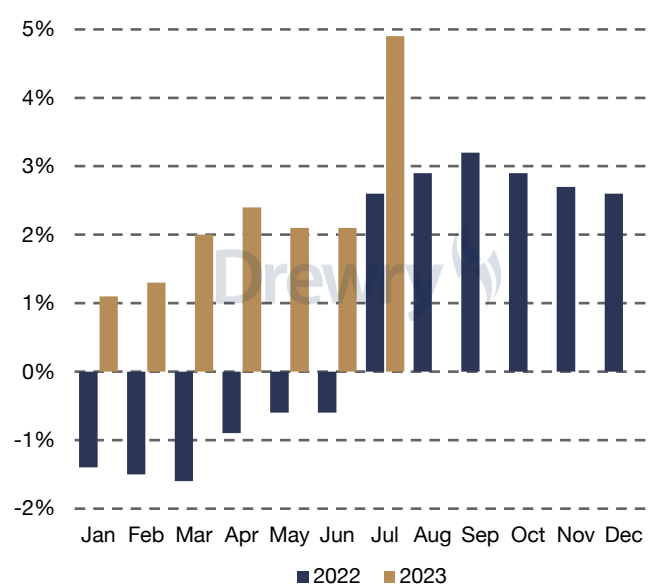|	Throughput 3.7% YoY		Port calls -1.9% YoY		Waiting 1.9% MoM Negative		Terminal Time 1.0% MoM Negative

Global Container Port Throughput Index improved 1.9% MoM in September 2023

Performance deteriorated slightly with an increase in other duration; overall volumes are estimated to have plunged 8.4% in October 2023 as indicated by Drewry's Nowcasting Model.

Throughput and port calls

The MoM rise in volumes in September 2023 across the majority of regions – but especially North America, Greater China and Asia, (excl. China) – resulted in a 1.9% MoM increase in the Global Container Port Throughput Index to 112.0 points, 3.7% above September 2022.

The rolling 12-month average growth rate for global port handling also improved slightly, to -0.8% compared to -1.2% in August 2023.

The number of vessel calls declined quite significantly in October 2023, resulting in a 7.2% MoM drop in the Global

Container Port Call Index to 100.7 points. This is 1.9% below last year's number. The capacity of vessel calls also contracted 7.1% MoM; however, this still stands above last year's levels, with continued production and deployment of very large capacity vessels leading to an increase of 5.8% YoY.

Drewry's Global Port Throughput Index is expected to have plunged 8.4% MoM in October 2023, down 3.4% YoY, and taking the rolling 12-month average growth rate lower to -1.1%, as indicated by Drewry's Nowcasting Model. All regions are anticipated to have declined in October, with Greater

China, Asia (excl. China) and North America the prime culprits.

Performance

In October 2023, the Drewry Global Container Port Performance Index worsened to 103.3 points, up 2.1% MoM, but still 8.3% below last year. The average total duration per vessel call increased to 1.25 days, primarily driven by a 4.7% MoM increase in other duration.

The MoM performance deteriorated markedly for the Middle East and South Asia with pre-berth waiting delays increasing 22%. Europe saw an improvement of 13% in pre-berth waiting time.

Global container port throughput and calls

Drewry Global Container Port Throughput Index
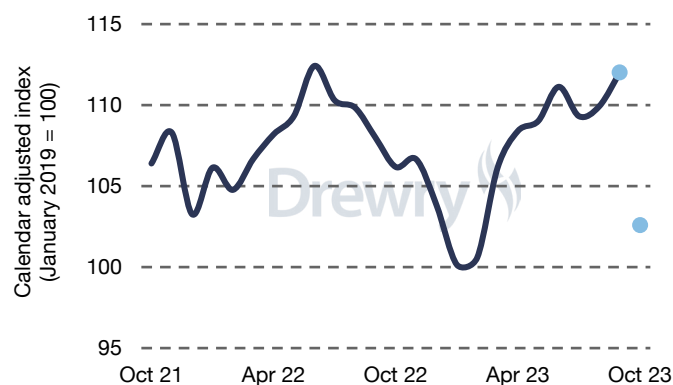
Comparisons	MoM	YoY
Sep 2023	1.9%	3.7%
Oct 2023 - nowcast	-8.4%	-3.4%

Global port handling rolling 12-month average growth rate
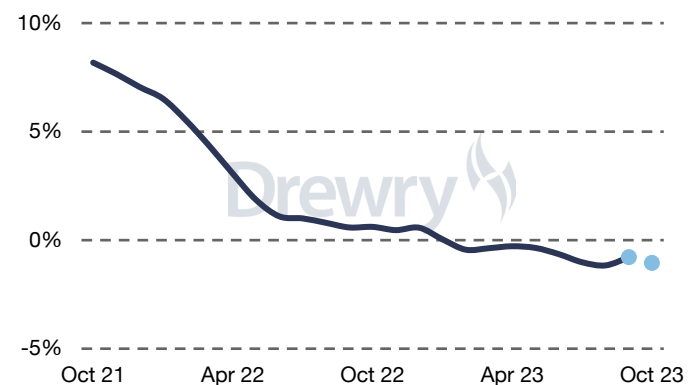
LTM growth rate	Global
Sep 2022	0.6%
Sep 2023	-0.8%
Oct 2022	0.6%
Oct 2023 - nowcast	-1.1%

The Drewry Global Container Port Throughput Index is a calendar adjusted volume growth/decline index based on monthly throughput data for a sample of over 340 ports worldwide, representing over 80% of global volumes. Performance for the most recent month is predicted using Drewry's Nowcast model which utilises AIS-based derived data on the capacity and duration of vessel calls to predict port activity levels.
Source: Drewry Maritime Research

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Global ports monitor

Global port throughput index - growth by region, September 2023 vs August 2023

Calendar adjusted index (January 2019 = 100)

Aug-23: 109.9, Middle East & South Asia: -0.2, Africa: 0.0, Latin America: 0.1, Oceania: 0.1, Europe: 0.2, Asia (excl. China): 0.6, Greater China: 0.6, North America: 0.7, Sep-23: 112.0

■ Increase ■ Decrease ■ Total

Source: Drewry Maritime Research
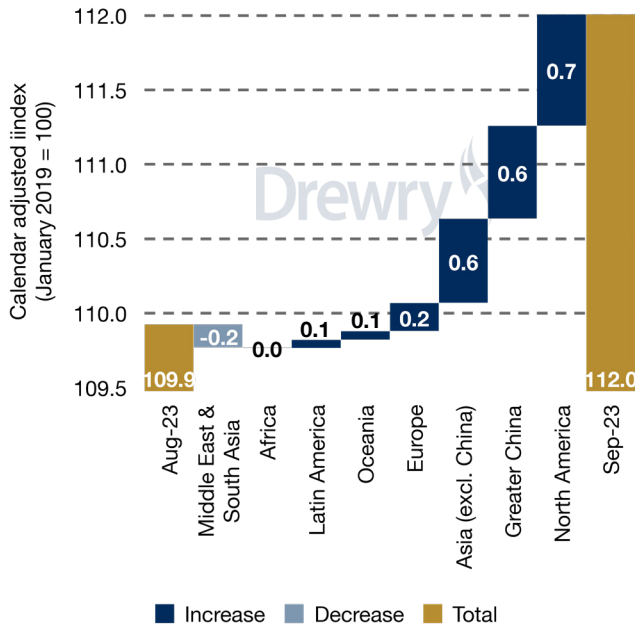
Regional summary - growth decline in throughput, Oct 2023 vs Sep 2023
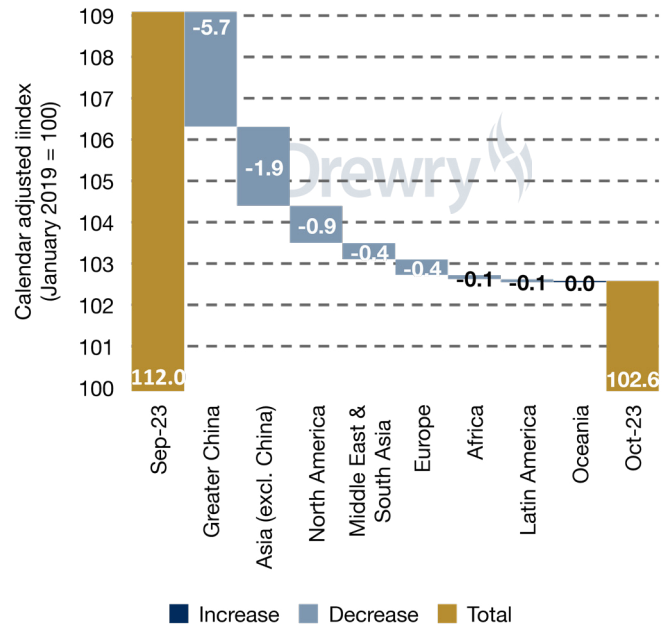
Calendar adjusted index (January 2019 = 100)

Sep-23: 112.0, Greater China: -5.7, Asia (excl. China): -1.9, North America: -0.9, Middle East & South Asia: -0.4, Europe: -0.4, Africa: -0.1, Latin America: -0.1, Oceania: 0.0, Oct-23: 102.6

■ Increase ■ Decrease ■ Total

Source: Drewry Maritime Research

Regional summary - growth decline in throughput, September 2023 vs September 2022
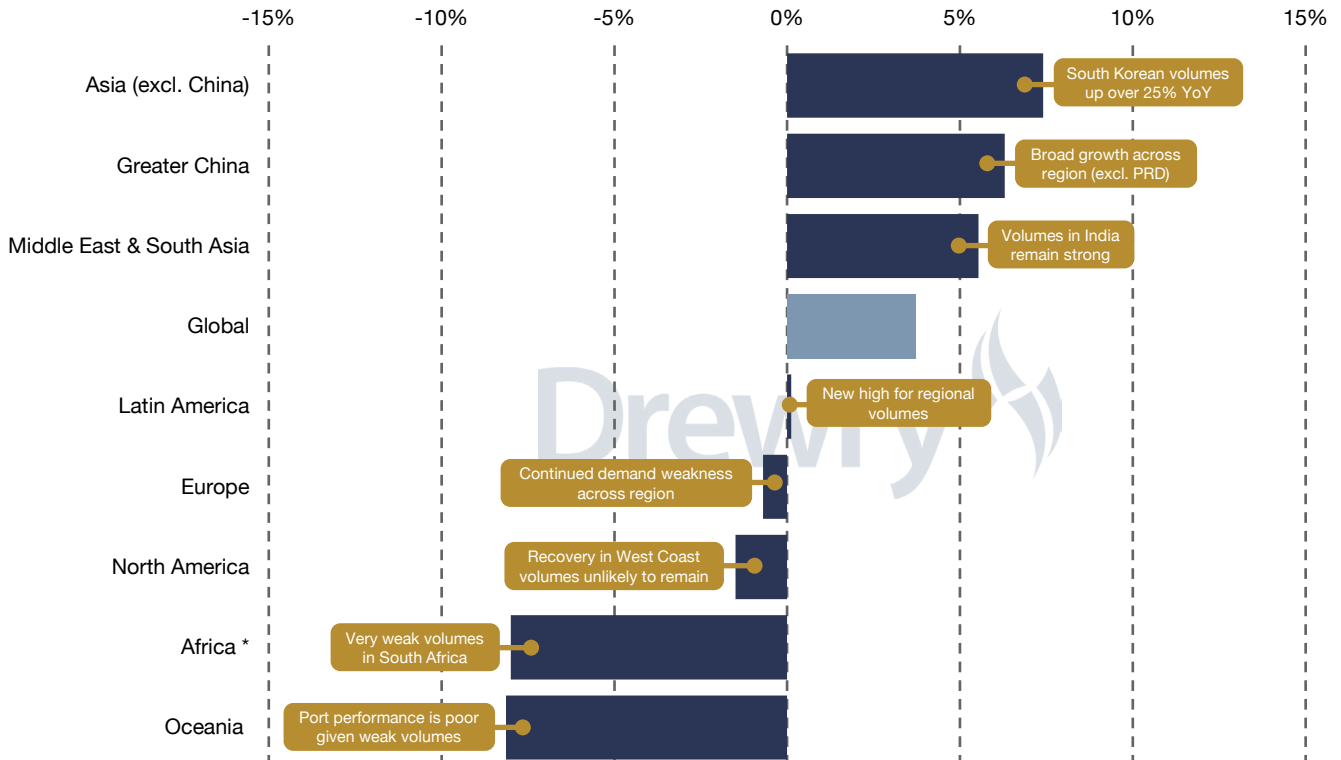
- Asia (excl. China): South Korean volumes up over 25% YoY
- Greater China: Broad growth across region (excl. PRD)
- Middle East & South Asia: Volumes in India remain strong
- Global
- Latin America: New high for regional volumes
- Europe: Continued demand weakness across region
- North America: Recovery in West Coast volumes unlikely to remain
- Africa *: Very weak volumes in South Africa
- Oceania: Port performance is poor given weak volumes

* The index figures for Africa are based on a relatively small sample and therefore should be viewed with caution.

Source: Drewry Maritime Research

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Global ports monitor

Development of average vessel size by region, 2020-2023

|	Oct-20	Oct-21	Oct 2021 vs Oct 2020	Oct-22	Oct 2022 vs Oct 2021	Oct-23	Oct 2023 vs Oct 2022	Oct 2023 vs Oct 2020
Global	4,381	4,169	-4.83%	4,186	0.42%	4,516	7.86%	3.08%
Greater China	4,978	4,695	-5.69%	4,870	3.75%	5,273	8.27%	5.93%
Asia (excl. China)	3,159	3,051	-3.40%	2,945	-3.49%	3,078	4.54%	-2.54%
North America	6,374	6,135	-3.74%	6,106	-0.47%	6,747	10.49%	5.85%
Europe	4,346	4,189	-3.61%	4,399	5.02%	4,802	9.15%	10.49%
Middle East & South Asia	5,660	4,711	-16.76%	4,880	3.59%	5,477	12.24%	-3.22%
Latin America	4,932	4,996	1.30%	4,759	-4.74%	5,038	5.86%	2.15%
Oceania	4,730	4,200	-11.22%	4,268	1.63%	4,177	-2.14%	-11.70%
Africa	3,981	3,788	-4.85%	3,778	-0.25%	4,138	9.54%	3.96%

Note: based on total monthly container vessel calls recorded at a sample of more than 190 worldwide ports, ports included in each region are detailed in the Appendix

Source: Drewry Maritime Research

Drewry Global Container Port Call Index
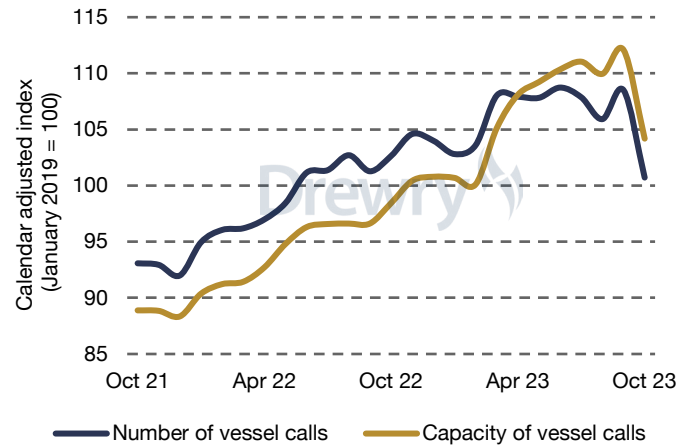
Oct 2023 Comparisons	MoM	YoY
Vessel calls	-7.2%	-1.9%
Vessel capacity	-7.1%	5.8%

Regional summary - growth/decline in number and capacity of vessel calls, October 2023 vs. October 2022
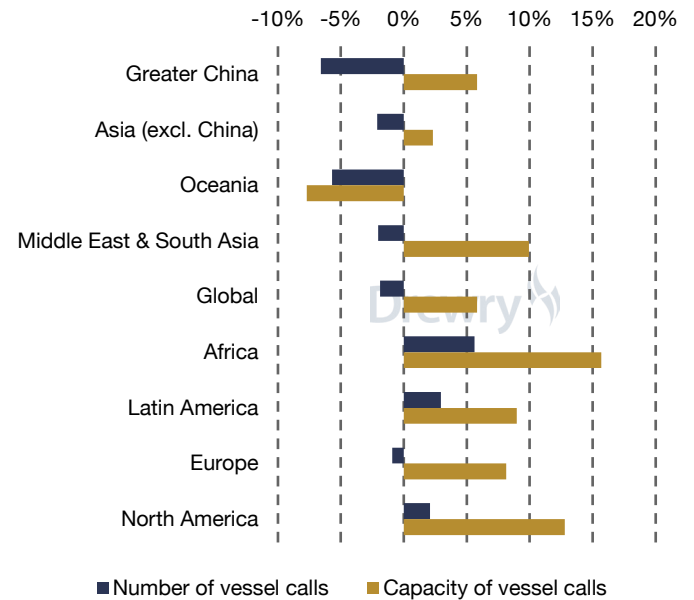
Note: The Drewry Global Port Call Index measures the growth/decline in total container vessel calls across a sample of over 190 ports worldwide which together handle over 85% of global container volumes. November 2021 data for Greater China region is estimated because new Chinese data regulation resulted in temporary reduction in recording of vessel AIS transmissions.
Source: Drewry Maritime Research

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Global ports monitor

Drewry Global Container Port Performance Index

Index (January 2019 = 100)

— Average total duration per vessel call
— Average total call duration per 1,000 teu vessel capacity

Oct 2023 Comparisons	MoM	YoY
Call duration	2.1%	-8.3%
Call duration per 1,000 teu	2.0%	-15.0%

Global average container port call duration

Days

— Average pre-berth waiting
— Average terminal duration
— Average other duration
— Average total port call duration

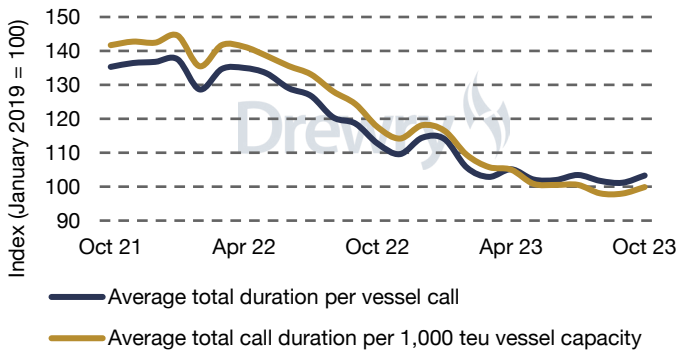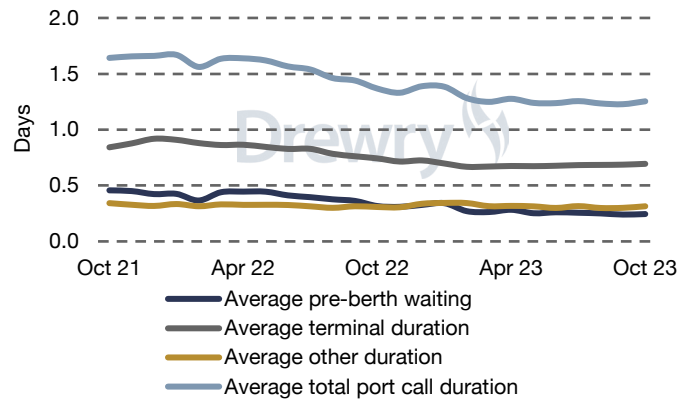| Oct 2023 Comparisons	MoM	YoY
Pre-berth waiting	1.9%	-22.6%
Terminal	1.0%	-6.6%
Other	4.7%	2.1%
Total	2.1%	-8.3%

Note: Average port call duration is based on AIS tracking of all container vessel calls at a sample of more than 190 ports worldwide which together handle over 85% of global container volumes. November 2021 data for Greater China region is estimated because new Chinese data regulation resulted in temporary reduction in recording of vessel AIS transmissions.
Source: Drewry Maritime Research

Port congestion by region, October 2023

Europe -13%

North America 10%

Greater China -4%

Africa 9%

M.East & S.Asia 22%

Latin America 9%

Asia ex. China 1%

Oceania 8%

Global 2%

🟩 Regional average pre-berth waiting comparable / below 2019 average level
🟨 Regional average pre-berth waiting marginally higher than 2019 average level
🟥 Regional average pre-berth waiting above 2019 average level

↘ MoM reduction in average pre-berth waiting
↔ Average pre-berth waiting stable MoM
↗ MoM increase in average pre-berth waiting

Source: Drewry Maritime Research

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Container market monitor

	Cancelled sailings	E/W Vessel Utilisation	Freight Rates	Throughput Forecast 2023
	-39.4% YoY	14.4% YoY	-46.0% YoY	0.0% YoY
				Upgrade

Container shipping trade outlook upgraded on modest rise in sentiment

Despite modest improvements to the outlook, container shipping remains challenged by overcapacity which will depress container freight rates.

Drewry has made some minor changes to its cargo demand forecast for 2024, with global port throughput now expected to increase by 2.2%, representing an improvement of 0.2 percentage points from the earlier projections.

Port statistics and trade volumes are finally showing some growth compared to the same period last year, but against a low baseline.

Nonetheless, things are moving in the right direction and the latest results are slightly ahead of where we thought they would be.

Container freight rates staged a modest recovery in November, with Drewry's composite World Container Index posting a gain of 7% QoQ. October's reading was the lowest since November 2019.

Carriers are finally attempting to stop the rot with more service suspensions, including THE Alliance withdrawing services from the Asia-North Europe and Asia-ECNA trades.
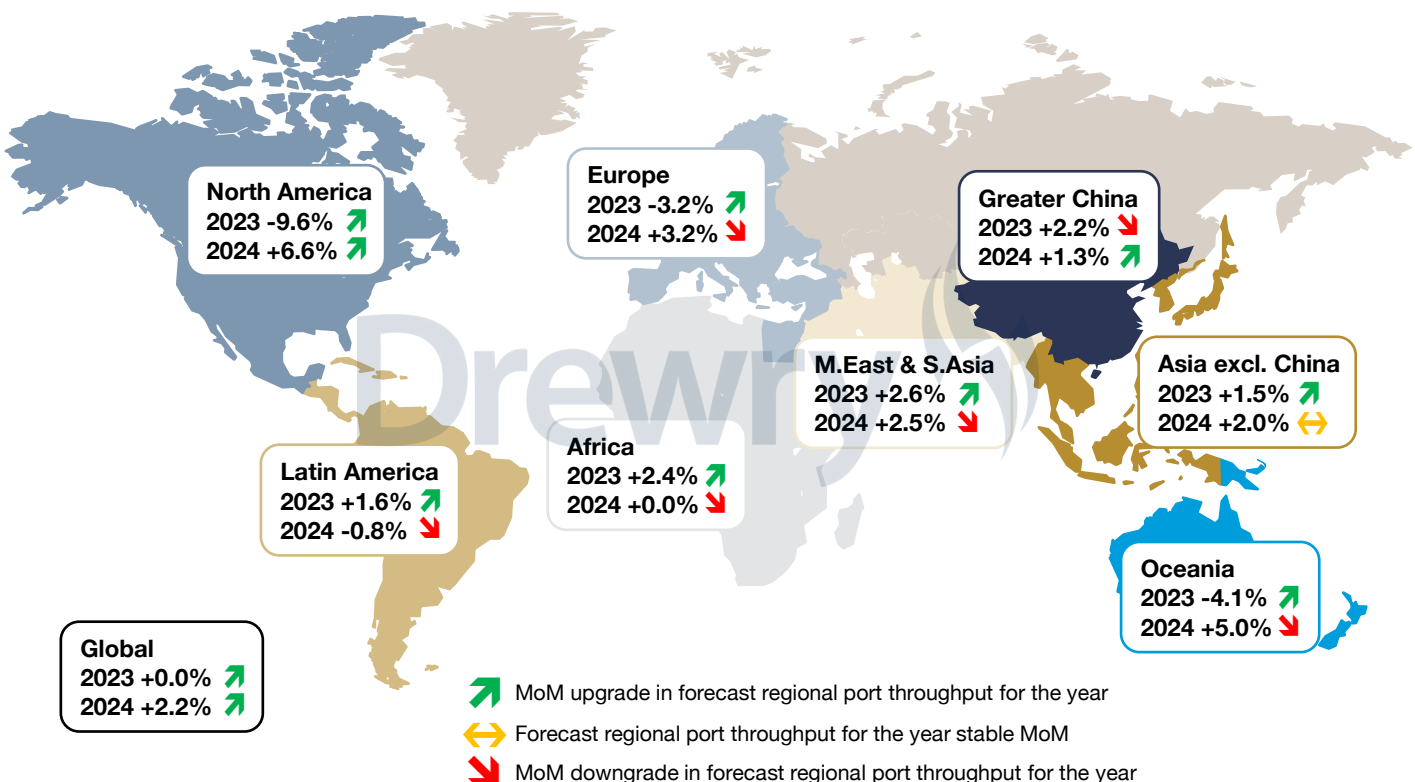
Container shipping's status quo is also threated by regulatory changes with the European Commission recently

announcing the decision not to renew the Consortia Block Exemption Regulation (Regulation 906/2009).

Very few consortia were actually covered by CBER so the impact will be minimal, apart from some legal uncertainty for carriers in the short term, in Drewry's view.

However, next year is shaping up to be incredibly challenging for carriers, given the extent of overcapacity. How they respond to cut costs will have implications for all stakeholders, port authorities and terminal operators in particular.

Drewry's port throughput forecasts, % change with MoM upgrades/downgrades

North America
2023 -9.6%
2024 +6.6%

Europe
2023 -3.2%
2024 +3.2%

Greater China
2023 +2.2%
2024 +1.3%

M.East & S.Asia
2023 +2.6%
2024 +2.5%

Asia excl. China
2023 +1.5%
2024 +2.0%

Latin America
2023 +1.6%
2024 -0.8%

Africa
2023 +2.4%
2024 +0.0%

Oceania
2023 -4.1%
2024 +5.0%

Global
2023 +0.0%
2024 +2.2%

MoM upgrade in forecast regional port throughput for the year

Forecast regional port throughput for the year stable MoM

MoM downgrade in forecast regional port throughput for the year

Source: Drewry Maritime Research

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Container market monitor

World Container Index (monthly average)
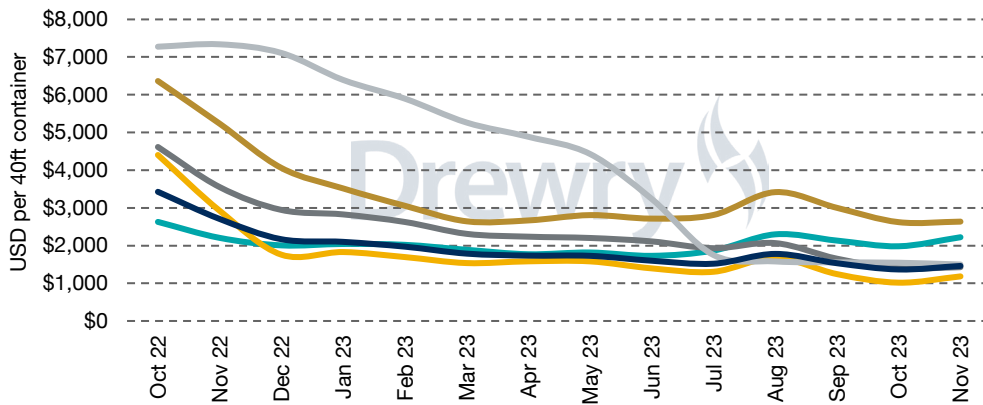
WCI comparisons	MoM	YoY
Nov-23	7%	-46%
Oct-23	-11%	-60%

- Shanghai-Los Angeles
- Shanghai-New York
- Shanghai-Rotterdam
- Shanghai-Genoa
- Rotterdam-New York
- WCI Composite

Note: Latest month is only partial

Source: Drewry Maritime Research

Monthly Cancelled Sailings Evolution, East-West major trades
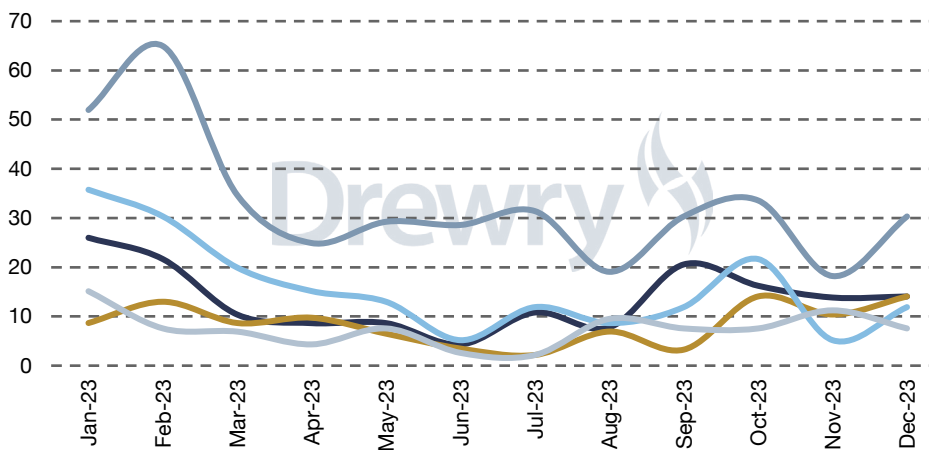
Cancelled sailings comparisons	MoM	YoY
Asia-N Europe	2%	-35%
Asia-WCNA	67%	-45%

- ASIA-N EUROPE
- ASIA-MED
- ASIA-WCNA
- ASIA-ECNA
- N Europe-N America

Source: Drewry Maritime Research

Headhaul utilisation on East-West trades
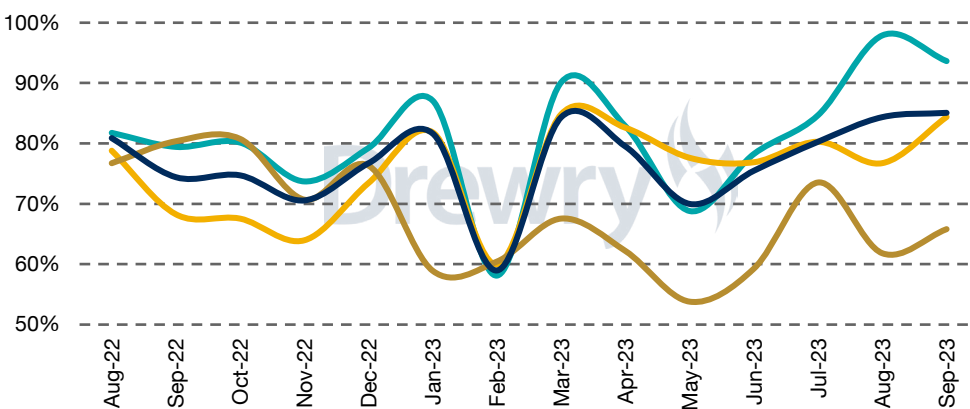
East-West Index comparisons	MoM	YoY
Sep-23	0.8%	14.4%
Aug-23	5.1%	4.3%

- EB Transpacific
- WB Asia-N Europe
- WB Transatlantic
- East-West Index

Note: East-West Index includes EB Transpacific, WB Asia-North Europe, WB Asia-Med, and WB Transatlantic

Source: Drewry Maritime Research

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Container market monitor

Selected upcoming service changes

Primary Trade route	Carrier(s)/alliance	Service name	No. ships	Avg cap (teu)	Frequency (days)	Details	Effective	Estimated MoM impact on effective trade capacity
Asia-North Europe	THE Alliance	FE5	12	13,915	7	Serivce Suspended until further notice	Nov-23	-4.53%
Asia-ECNA	THE Alliance	EC4	13	13,870	7	Serivce Suspended until further notice	Nov-23	-0.065
Asia-WCSA	ZIM	ZIM Albatross 'ZAT' Service	9	4,250	7	New Service to be launched by ZIM	Dec-23	TBN
Asia-East Africa	ESL / RCL / Interasia	FAX / REA / IEA	8	2800	7	New joint service by 6 carriers	Dec-23	TBN
North America-ECSA	ZIM	ZIM Gulf Toucan 'ZGT' Service	TBN	TBN	TBN	New Service to be launched by ZIM	Jan-24	TBN

Note: TBN - To be notified

Source: Drewry Maritime Research

Greater China ports monitor

Throughput	Port calls	Waiting	Terminal Time
6.3% YoY	-6.6% YoY	-4.3% MoM	-2.7% MoM
		Positive	Positive

Chinese port volumes remain near recent highs in September 2023

Chinese port volumes have been on an uptrend in 2023, but are expected to have slumped by 13.8% MoM in October 2023 as indicated by Drewry's Nowcasting Model.

Throughput and port calls

In September 2023, the Greater China Container Port Throughput Index rose 1.5% MoM to 116.7 points, marking a 6.3% YoY increase.

The 12-month average growth rate in Greater China also improved to 3.9% in September 2023, far surpassing the -0.8% global average growth rate.

Hong Kong was the only major port to post a decline in September, down 14% YoY.

Other regions saw some good growth, with Dalian up 36% YoY, Ningbo up 22% YoY and Qinzhou up 17% YoY.

Qingdao had another robust month in

September, dropping just 0.6% from last month's high, but 12.1% ahead of September 2022.

The Greater China Container Port Call Index fell sharply by 13.3% MoM/6.6% YoY in October 2023 to 90.7 points. Similarly, vessel capacity was down 14.4% MoM.

Drewry's Nowcast estimate indicates a steep decrease in volumes for October 2023, with the Container Port Throughput Index predicted to have fallen 13.8% MoM to 101.1 points, marking a 5.8% YoY decrease. This will have shifted the rolling 12-month average port throughput rate downwards to 3.1%.

Performance

The Drewry Greater China Container Port Performance Index was very stable again in October 2023, experiencing a slight 0.6% MoM increase in total port call duration. A 4.3% decrease in the average pre-berth waiting time was offset by a 7.9% increase in other duration.

Ningbo continues to suffer from the longest pre-berth waiting time across our sample of ports in the region, although October did see a 20% reduction to 0.4 day. Shanghai also improved slightly, with a 7% MoM decrease to 0.3 day.

Greater China container port throughput and calls

Drewry Greater China Container Port Throughput Index
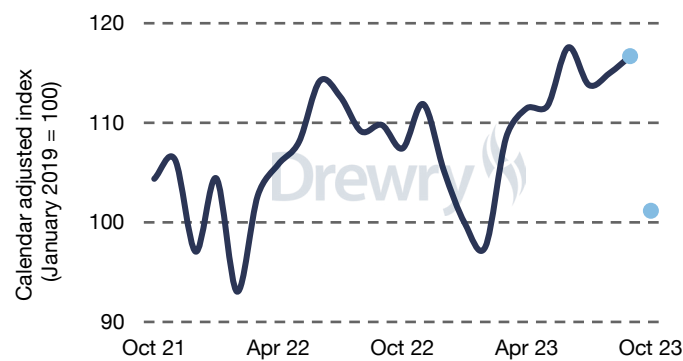
Comparisons	MoM	YoY
Sep 2023	1.5%	6.3%
Oct 2023 - nowcast	-13.3%	-5.8%

Greater China rolling 12-month average growth rate
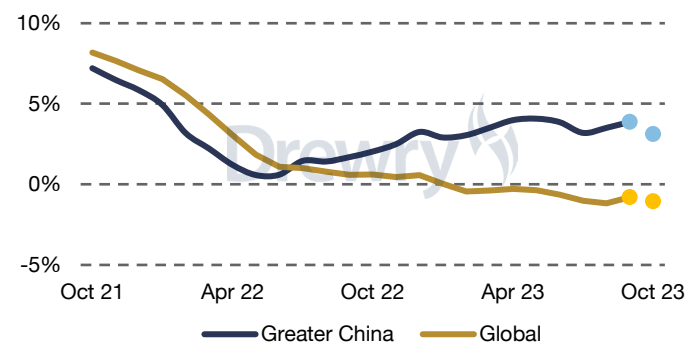
LTM growth rate	Greater China	Global
Sep 2022	1.7%	0.6%
Sep 2023	3.9%	-0.8%
Oct 2022	2.0%	0.6%
Oct 2023 - nowcast	3.1%	-1.1%

Note: Performance for the most recent month is predicted using Drewry's Nowcast model which utilises AIS-based derived data on the capacity and duration of vessel calls to predict port activity levels.
Source: Drewry Maritime Research

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Greater China ports monitor

Greater China - growth / decline in port throughput
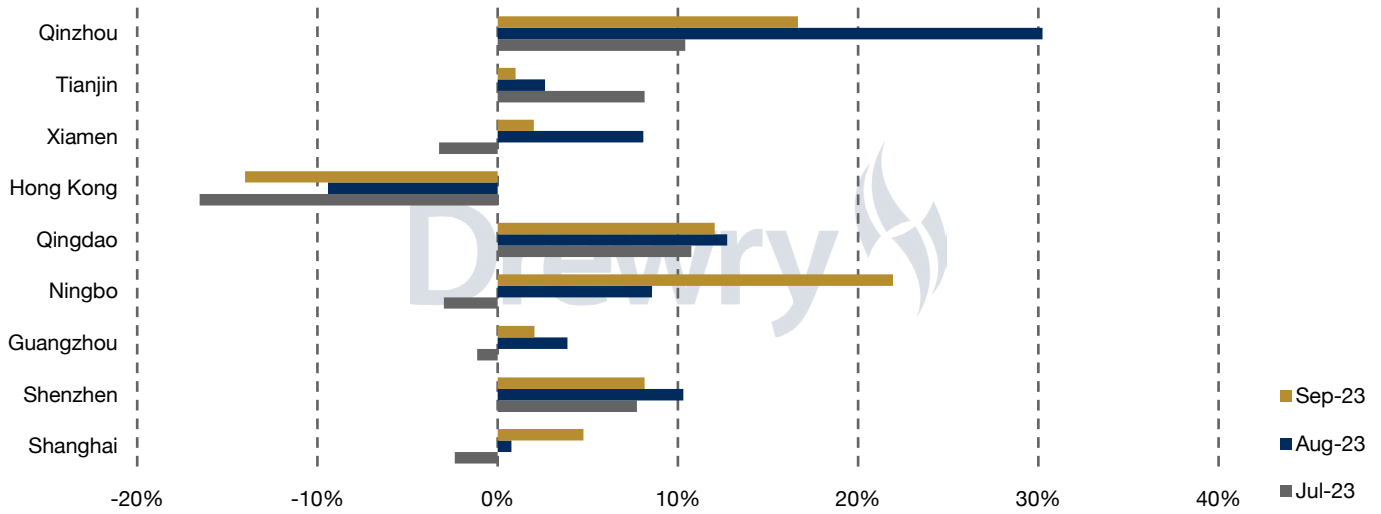
Legend:
- Sep-23
- Aug-23
- Jul-23

Source: Drewry Maritime Research

Drewry Greater China Container Port Call Index

Y-axis: Calendar adjusted index (January 2019 = 100)

Legend:
- Number of vessel calls
- Capacity of vessel calls

Oct 2023 Comparisons	MoM	YoY
Vessel calls	-13.3%	-6.6%
Vessel capacity	-14.4%	1.1%
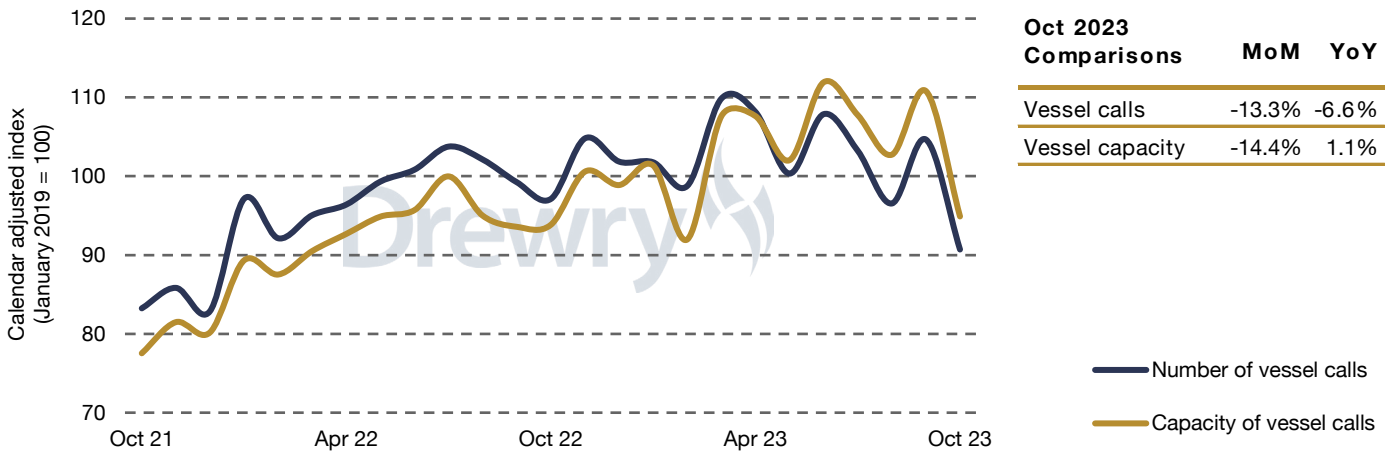
Note: November 2021 data for Greater China region is estimated because new Chinese data regulation resulted in temporary reduction in recording of vessel AIS transmissions.

Source: Drewry Maritime Research

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Greater China ports monitor

Greater China container port performance

Drewry Greater China Container Port Performance Index

Oct 2023 Comparisons	MoM	YoY
Call duration	0.6%	-13.5%
Call duration per 1,000 teu	1.8%	-20.1%

— Average total duration per vessel call

— Average total duration per 1,000 teu vessel capacity

Note: November 2021 data for Greater China region is estimated because new Chinese data regulation resulted in temporary reduction in recording of vessel AIS transmissions.

Source: Drewry Maritime Research

Greater China average container port call duration

Oct 2023 comparisons	MoM	YoY
Pre-berth waiting	-4.3%	-25.9%
Terminal	-2.7%	-15.8%
Other	7.9%	-0.8%
Total	0.6%	-13.5%

— Average pre-berth waiting
— Average terminal duration
— Average other duration
— Average total port call duration

Note: November 2021 data for Greater China region is estimated because new Chinese data regulation resulted in temporary reduction in recording of vessel AIS transmissions.

Source: Drewry Maritime Research

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Greater China ports monitor

Greater China, pre-berth waiting time, October 2023

Greater China
Average pre-berth waiting: 0.2 days
% variation vs 2019 average: +17%

China

Yingkou ↗ **0.0 day**

Tianjin ↗ **0.3 day**

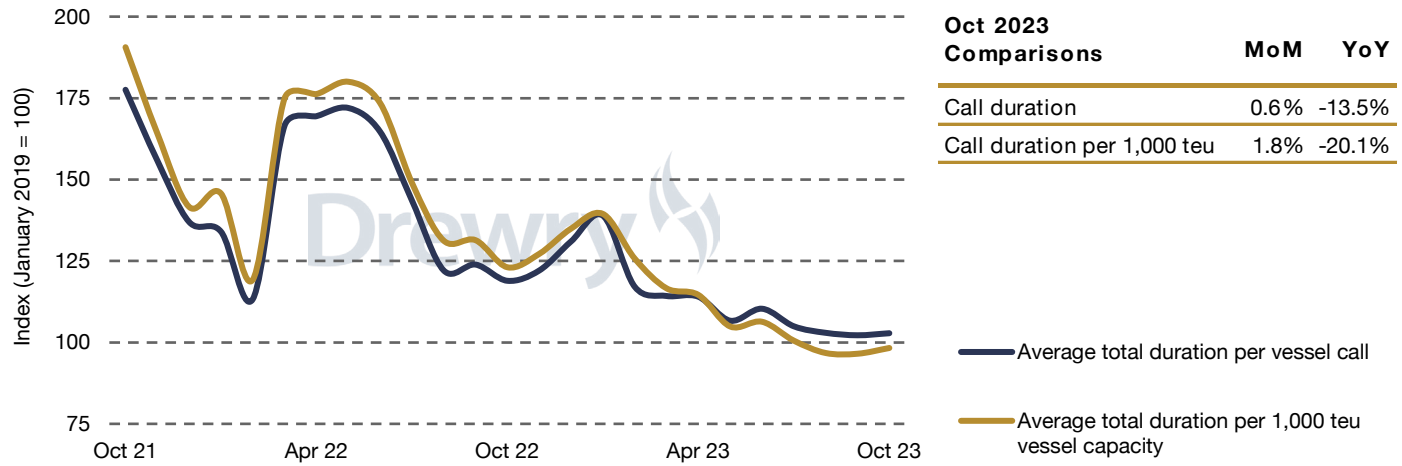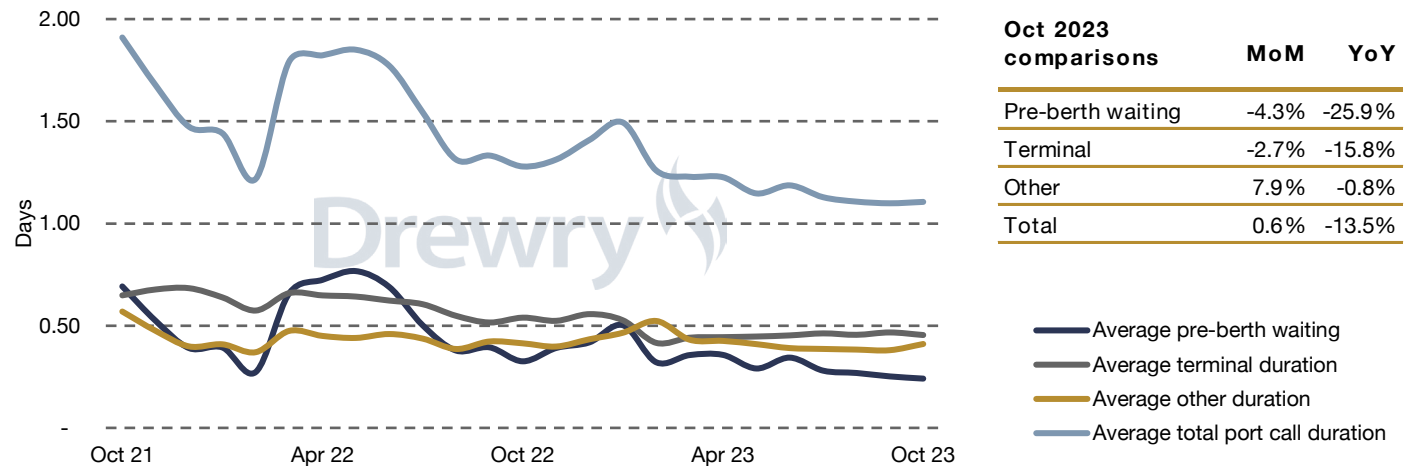**Dalian** ↗ **0.2 day**

Rizhao ↗ **0.3 day**

Qingdao ↗ **0.3 day**

Lianyungang ↗ **0.3 day**

Shanghai ↔ **0.3 day**

Hong Kong ↗ **0.1 day**

Guangzhou ↘ **0.1 day**

Shenzhen ↘ **0.1 day**

Ningbo ↗ **0.4 day**

Qinzhou ↗ **0.2 day**

Xiamen ↘ **0.1 day**

● >10% lower than regional average pre-berth waiting
● Within +/- 10% than regional average pre-berth waiting
● >10% higher than regional average pre-berth waiting

↘ MoM reduction in average pre-berth waiting
↔ Average pre-berth waiting stable MoM
↗ MoM increase in average pre-berth waiting

Source: Drewry Maritime Research

Greater China, mainline vessel performance for selected ports, October 2023
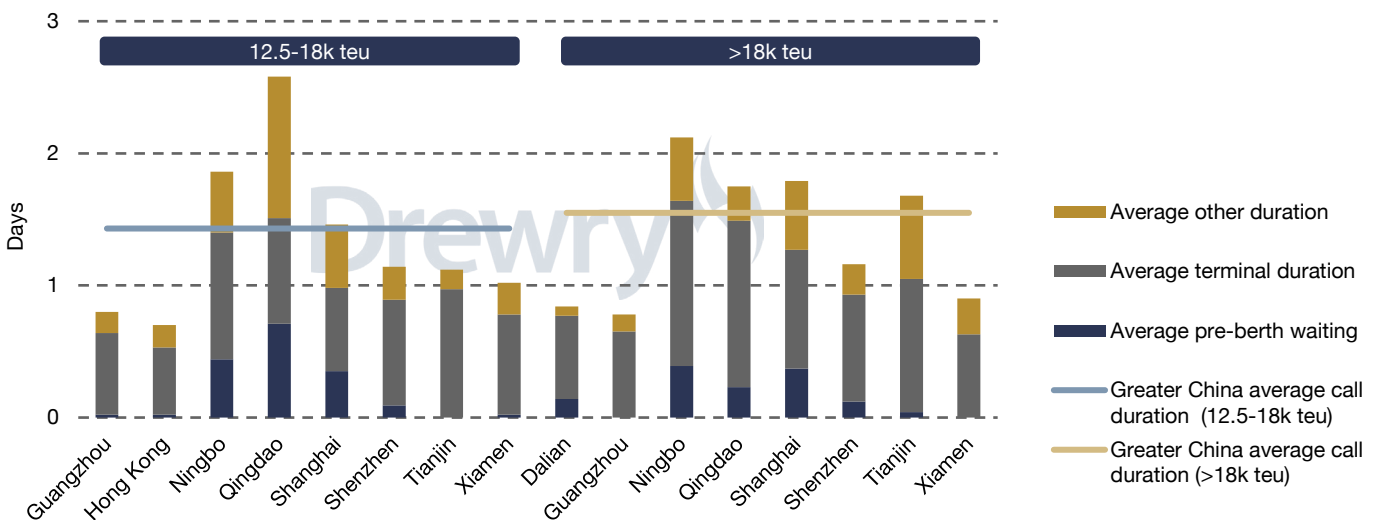
12.5-18k teu | >18k teu

Days

Ports: Guangzhou, Hong Kong, Ningbo, Qingdao, Shanghai, Shenzhen, Tianjin, Xiamen, Dalian, Guangzhou, Ningbo, Qingdao, Shanghai, Shenzhen, Tianjin, Xiamen

Legend:
■ Average other duration
■ Average terminal duration
■ Average pre-berth waiting
— Greater China average call duration (12.5-18k teu)
— Greater China average call duration (>18k teu)

Notes:
(1) 'Other' includes navigation within the port and to/from anchorage zone and intermediate waiting incurred after initial terminal call.
(2) Regional average figures include larger number of ports than those detailed in the charts.

Source: Drewry Maritime Research

Drewry

Asia (excluding China) ports monitor

Throughput	Port calls	Waiting	Terminal Time
7.4% YoY	-2.1% YoY	1.2% MoM	0.4% MoM
		Negative	**Neutral**
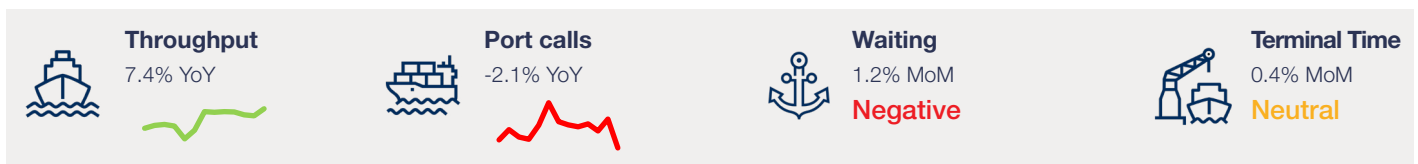
Asia (excl. China) region saw new port throughput highs in September, up 2.6% MoM

The region's port volumes have grown strongly since March 2023, but we expect volumes to have fallen 8.6% MoM in October 2023 as indicated in Drewry's Nowcasting Model.

Throughput and port calls

The Asia (excluding China) Container Port Throughput Index hit new highs in September 2023, up 2.6% to 109.5, 7.4% ahead of last year.

The rolling 12-month average growth rate in September 2023 was -0.5%, slightly above the global average growth rate of -0.8%.

In September 2023, volumes at the South Korean ports surged. Busan was up over 25% YoY, with Incheon up 22.5% and Gwangyang up 27%!

Singapore and Port Klang also saw throughput increase over 2022, up 4.7%

and 7.4%, respectively.

The number of vessel calls fell sharply in October 2023, with a 7.2% MoM decrease in the Container Port Call Index to 99.4.

Drewry's Nowcast Model indicates that volumes will have decreased significantly in October 2023, falling 8.6% MoM. This change is projected to have decreased the 12-month rolling average growth rate to -0.6%.
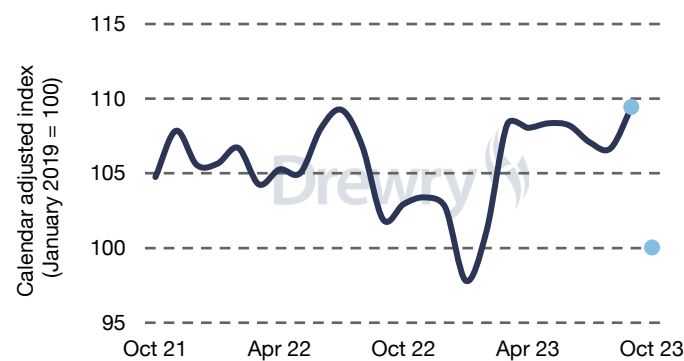
Performance

The average port call duration across the region increased 3.5% MoM in October, leaving the Drewry

Asia (excl. China) Container Port Performance Index at 94.4, 16.1% below October 2022. The increase can be attributed to the 11.8% growth in other duration – rising from 0.2 day to 0.3 day in October.

Manila continues to improve its situation with a reduction in pre-berth waiting time, which is now at 0.6 day compared to 1.1 days in August. Bangkok saw a slight increase from 0.4 day to 0.5 day. Notably, no other port in our regional sample is currently experiencing pre-berthing waiting time of more than 0.4 day.

Drewry Asia (excl. China) container port throughput and calls

Drewry Asia (excl. China) Container Port Throughput Index

Comparisons	MoM	YoY
Sep 23	2.6%	7.4%
Oct 2023 - nowcast	-8.6%	-2.8%

Asia (excl. China) rolling 12-month average growth rate

— Asia (excl. China) — Global
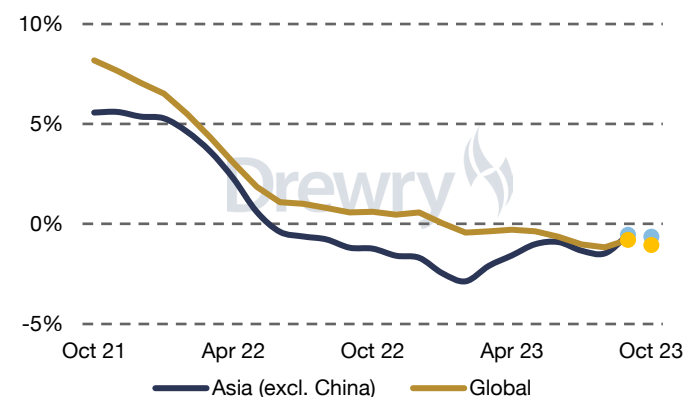
LTM growth rate	Asia (excl. China)	Global
Sep 2022	-1.2%	0.6%
Sep 2023	-0.5%	-0.8%
Oct 2022	-1.2%	0.6%
Oct 2023 - nowcast	-0.6%	-1.1%

Note: Performance for the most recent month is predicted using Drewry's Nowcast model which utilises AIS-based derived data on the capacity and duration of vessel calls to predict port activity levels.
Source: Drewry Maritime Research

Drewry

Asia (excluding China) ports monitor

Asia (excl. China) - growth / decline in port throughput
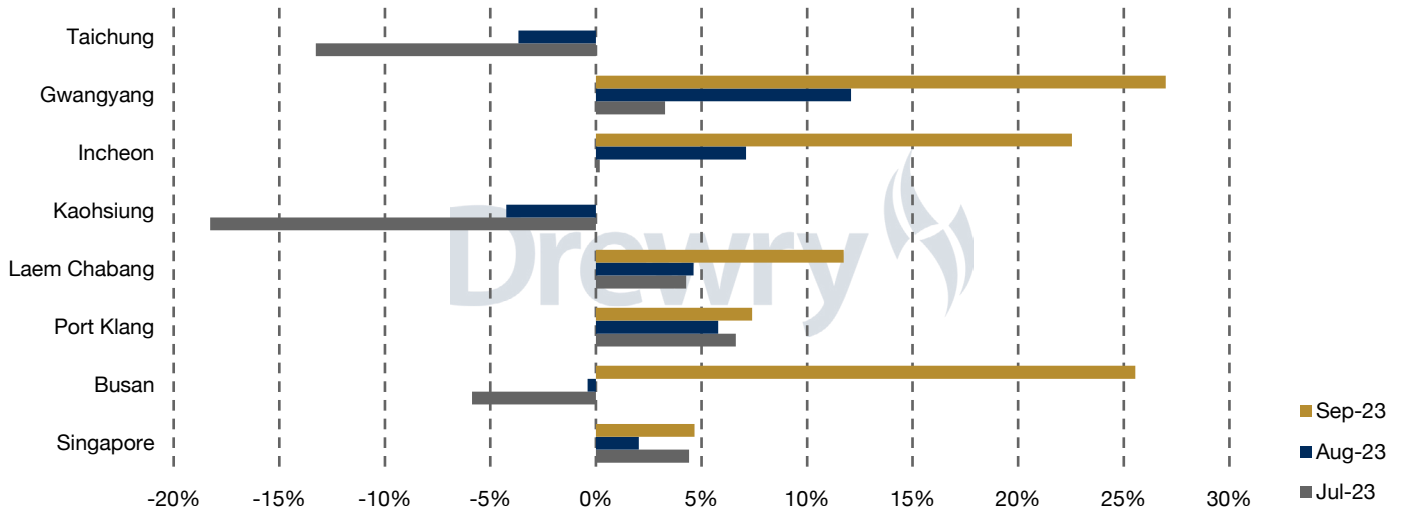
Source: Drewry Maritime Research

Drewry Asia (excl. China) Container Port Call Index

Oct 2023 Comparisons	MoM	YoY
Vessel calls	-7.2%	-2.1%
Vessel capacity	-10.6%	2.3%

Source: Drewry Maritime Research

Drewry 🔥

Asia (excluding China) ports monitor

Drewry Asia (excl. China) container port performance

Drewry Asia (excl. China) Container Port Performance Index

Oct 2023 comparisons	MoM	YoY
Call duration	3.5%	-16.1%
Call duration per 1,000 teu	7.4%	-19.7%

— Average total duration per vessel call

— Average total duration per 1,000 teu vessel capacity
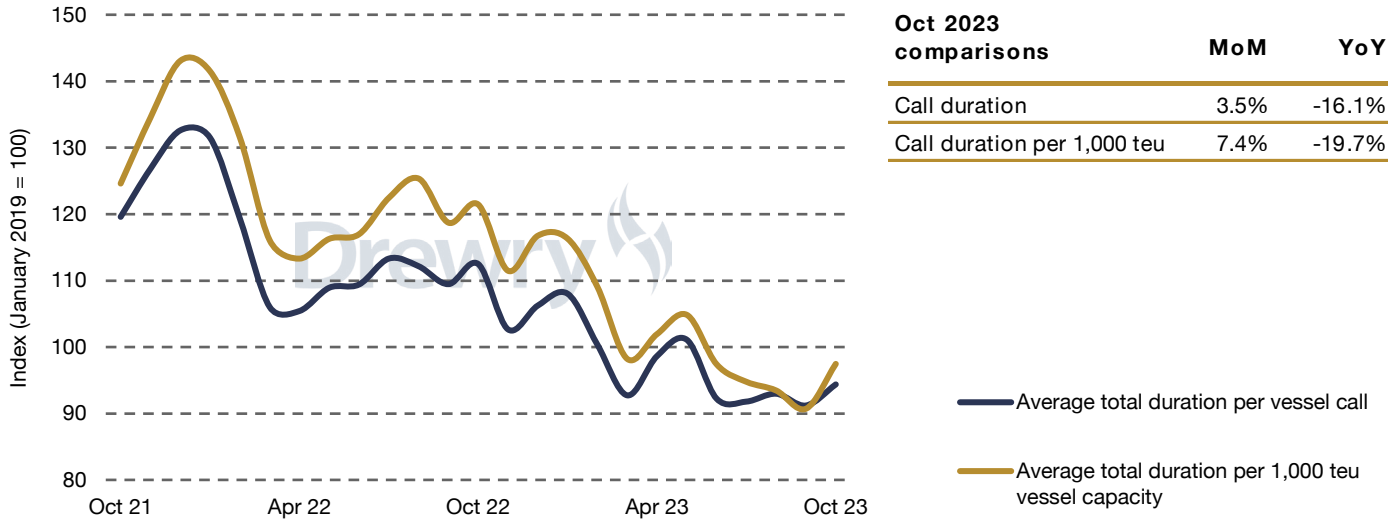
Source: Drewry Maritime Research

Asia (excl. China) average container port call duration

Oct 2023 comparisons	MoM	YoY
Pre-berth waiting	1.2%	-44.2%
Terminal	0.4%	-10.5%
Other	11.8%	-1.8%
Total	3.5%	-16.1%

— Average pre-berth waiting
— Average terminal duration
— Average other duration
— Average total port call duration

Source: Drewry Maritime Research

Drewry

Asia (excluding China) ports monitor

North Asia, pre-berth waiting time, October 2023

Vladivostok ↔ 0.4 day	**Vostochny** ↗ 0.2 day
Incheon ↗ 0.1 day	**Busan** ↗ 0.1 day
Gwangyang ↗ 0.0 day	**Tokyo** ↗ 0.0 day
Kobe ↘ 0.0 day	**Yokohama** ↔ 0.0 day
Osaka ↗ 0.0 day	**Nagoya** ↘ 0.0 day
Taichung ↔ 0.0 day	**Taipei** ↔ 0.0 day
Kaohsiung ↔ 0.2 day	

Asia (excl China)
Average pre-berth waiting: 0.1 days
% variation vs 2019 average: +19%

- 🟢 >10% lower than regional average pre-berth waiting
- 🟡 Within +/- 10% than regional average pre-berth waiting
- 🔴 >10% higher than regional average pre-berth waiting

- ↘ MoM reduction in average pre-berth waiting
- ↔ Average pre-berth waiting stable MoM
- ↗ MoM increase in average pre-berth waiting

Source: Drewry Maritime Research

North Asia, mainline vessel performance for selected ports, October 2023

Legend:
- Average other duration
- Average terminal duration
- Average pre-berth waiting
- Asia (excl. China) average call duration(10-12.5k teu)
- Asia (excl. China) average call duration (12.5-18k teu)
- Regional average (>18k teu)

Notes:
(1) 'Other' includes navigation within the port and to/from anchorage zone and intermediate waiting incurred after initial terminal call.
(2) Regional average figures include larger number of ports than those detailed in the charts.

Source: Drewry Maritime Research

Drewry

Asia (excluding China) ports monitor

South East Asia, pre-berth waiting time, October 2023

- 🟢 >10% lower than regional average pre-berth waiting
- 🟡 Within +/- 10% than regional average pre-berth waiting
- 🔴 >10% higher than regional average pre-berth waiting

- ⬇ MoM reduction in average pre-berth waiting
- ↔ Average pre-berth waiting stable MoM
- ↗ MoM increase in average pre-berth waiting

Map labels:
- Yangon 0.1 day
- Bangkok 0.5 day
- Haiphong 0.2 day
- Manila 0.6 day
- Laem Chabang 0.1 day
- Ho Chi Minh City 0.1 day
- Sihanoukville 0.3 day
- Singapore 0.0 day
- Port Klang 0.1 day
- Tanjung Priok 0.4 day
- Tanjung Pelepas 0.2 day
- Surabaya 0.4 day

Asia (excl China)
Average pre-berth waiting: 0.1 days
% variation vs 2019 average: +19%

Source: Drewry Maritime Research

Southeast Asia, mainline vessel performance for selected ports, October 2023

Legend:
- Average other duration
- Average terminal duration
- Average pre-berth waiting
- Asia (excl. China) average call duration (12.5-18k teu)
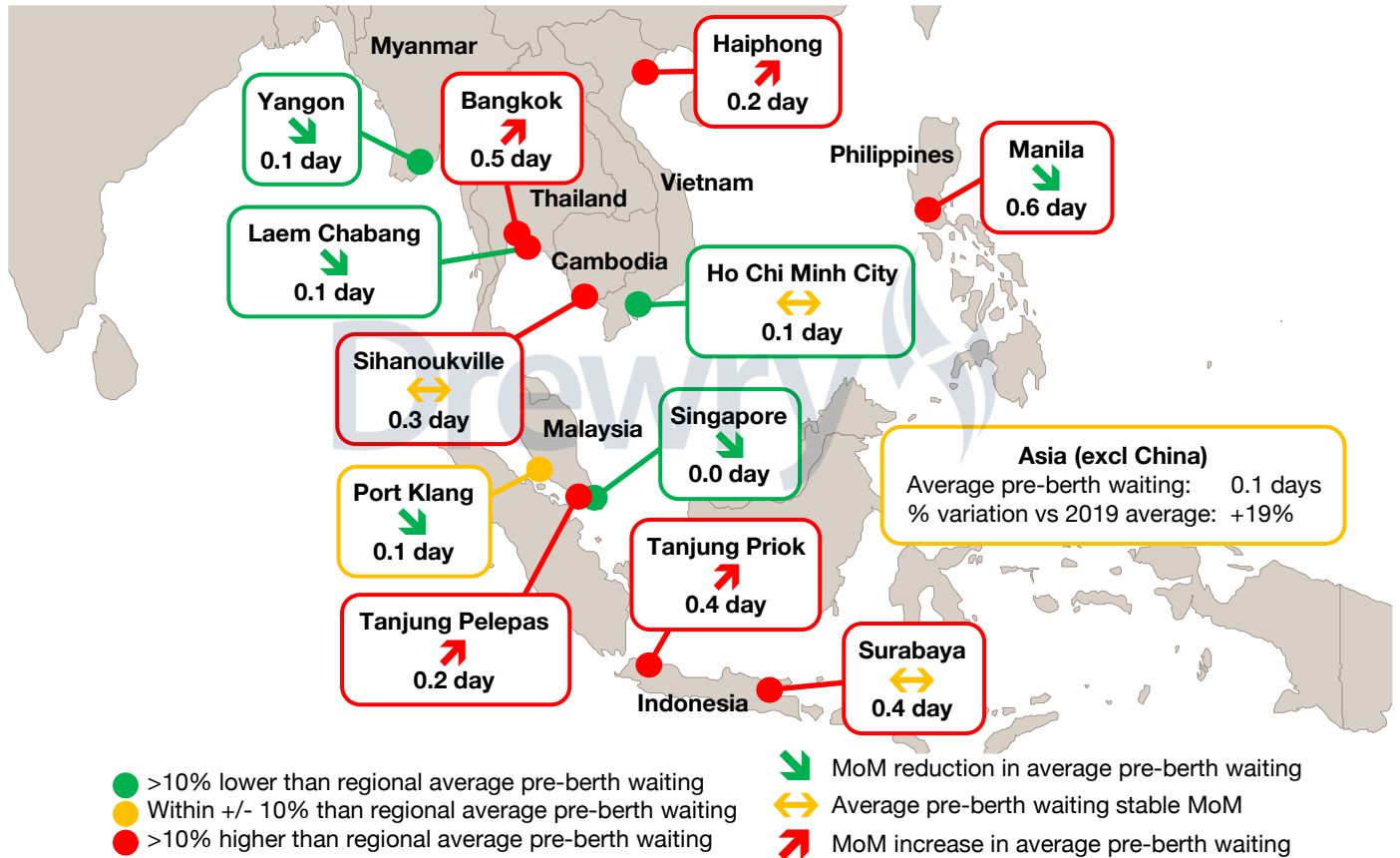- Asia (excl. China) average call duration (>18k teu)

Notes:
(1) 'Other' includes navigation within the port and to/from anchorage zone and intermediate waiting incurred after initial terminal call.
(2) Regional average figures include larger number of ports than those detailed in the charts.
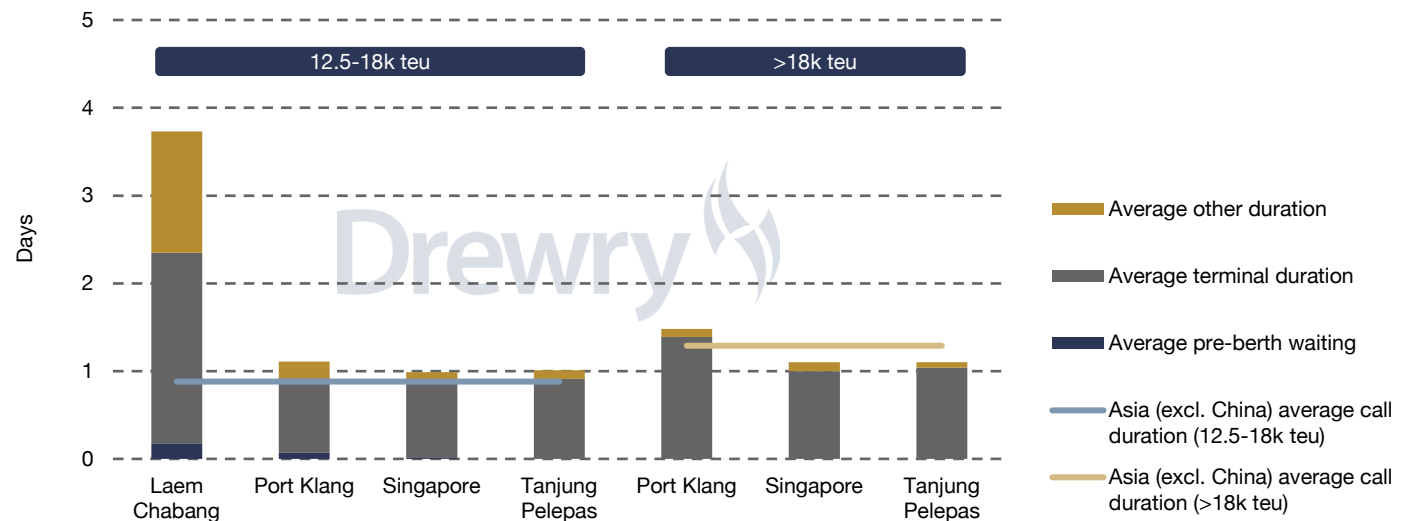
Source: Drewry Maritime Research

North America ports monitor

Throughput	Port calls	Waiting	Terminal Time
-1.5% YoY	2.1% YoY	9.8% MoM	-0.7% MoM
		Negative	Neutral

The North American Throughput Index jumped 7.4% MoM in September

Strong MoM growth in September throughout the West Coast ports without any dip in performance, while in October Drewry's Nowcasting Model predicts volumes would have likely fallen sharply.

Throughput and port calls

The North American Container Port Throughput Index jumped 7.4% MoM, reaching 109.1 in September 2023, but remained 1.5% lower than in September 2022.

The rolling 12-month average growth rate continued to fall further into negative territory in September 2023, now at -12.5%, significantly below the global average of -0.8%.

The MoM increase was driven by a surge in throughput on the Western seaboard, including Long Beach (up 21.6%), Seattle (up 35.8%) and Vancouver (up 12.7%).

On the East Coast, port volumes remained subdued. The ports of Montreal, New York, Norfolk and Charleston each registered small declines in throughput in September 2023.

The North American Vessel Call Index plunged 7.0% MoM in October 2023, reaching 97.8 points, only 2.1% higher than it was in October 2022.

Drewry's Nowcasting Model indicates that the Port Throughput Index is expected to have given up all its gains in October 2023, falling by 8.3% to 100.1 points. The rolling 12-month average growth is expected to have suffered accordingly, and is now at -13.2%.

Performance

In October 2023, the North America Container Port Performance Index reduced slightly, falling 1.5% MoM to 96.0 points. There was a 9.8% rise in pre-berth waiting time, but it remains 58% below last year's number.

On the East Coast, the situation at Savannah has worsened, with waiting time increasing 15% to 2.7 days, due to vessel bunching caused by the ongoing berth construction projects. On the other hand, Houston reduced waiting time by 43% to 0.4 day and Baltimore by 31% to 0.5 day.

The West Coast ports have largely been able to accommodate the surge in volumes, with pre-berth waiting time at Long Beach and Vancouver reducing slightly compared to the previous month.

North America container port throughput and calls

Drewry North America Container Port Throughput Index
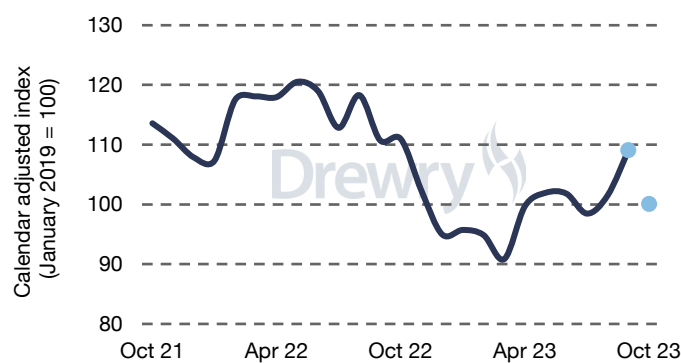
Comparisons	MoM	YoY
Sep 2023	7.4%	-1.5%
Oct 2023 - nowcast	-8.3%	-9.8%

North America rolling 12-month average growth rate
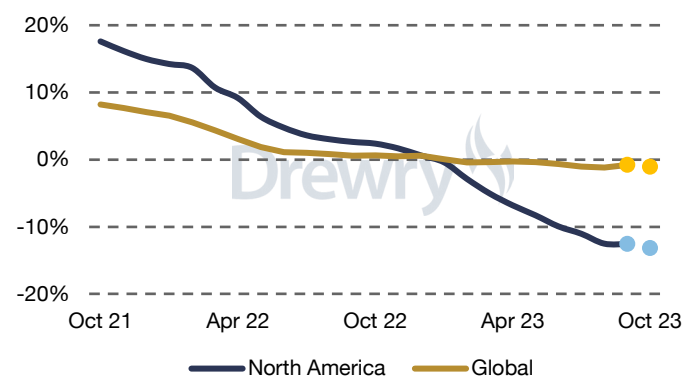
LTM growth rate	North America	Global
Sep 2022	2.6%	0.6%
Sep 2023	-12.5%	-0.8%
Oct 2022	2.4%	0.6%
Oct 2023 - nowcast	-13.2%	-1.1%

Note: Performance for the most recent month is predicted using Drewry's Nowcast model which utilises AIS-based derived data on the capacity and duration of vessel calls to predict port activity levels.
Source: Drewry Maritime Research

Drewry

North America ports monitor

North America - growth / decline in port throughput
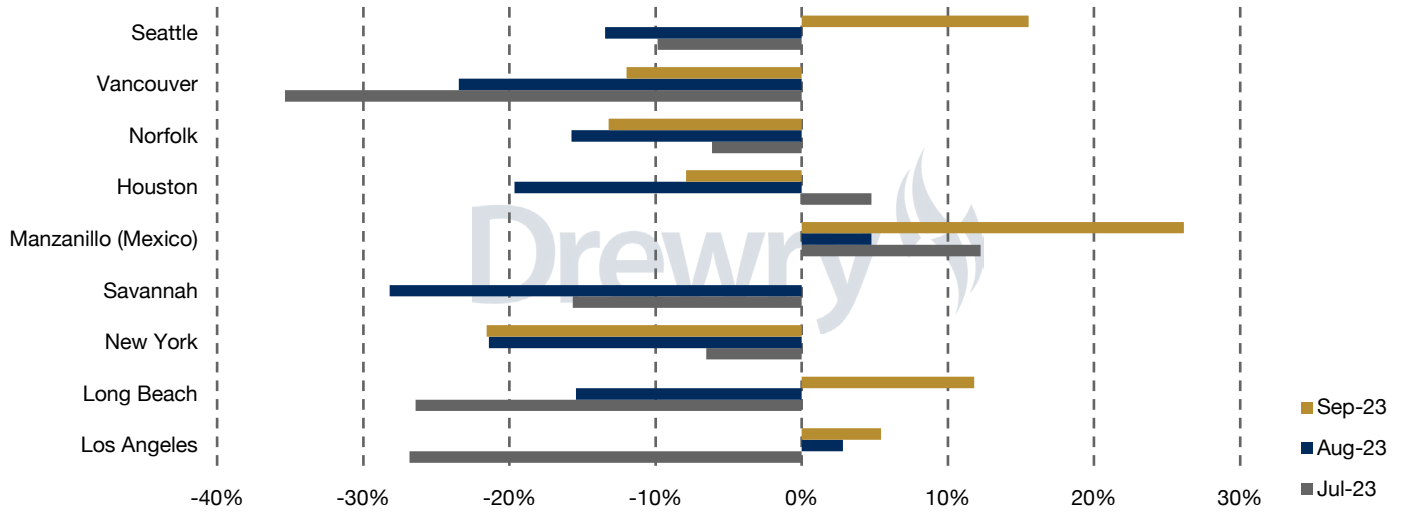
Legend:
- Sep-23
- Aug-23
- Jul-23

Source: Drewry Maritime Research

Drewry North America Container Port Call Index
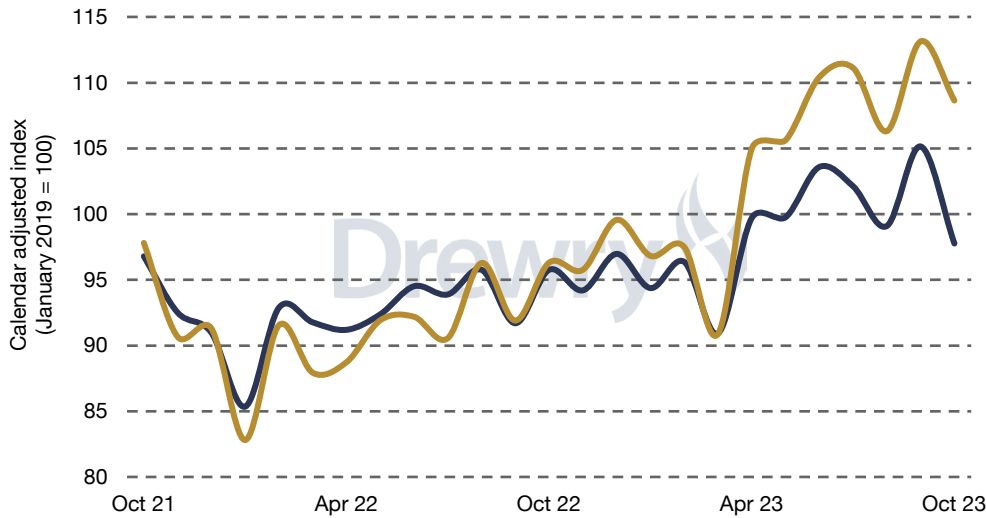
Oct 2023 comparisons	MoM	YoY
Vessel calls	-7.0%	2.1%
Vessel capacity	-4.0%	12.8%

Legend:
- Number of vessel calls
- Capacity of vessel calls

Source: Drewry Maritime Research

Drewry

North America ports monitor

Drewry North America container port performance

Drewry North America Container Port Performance Index
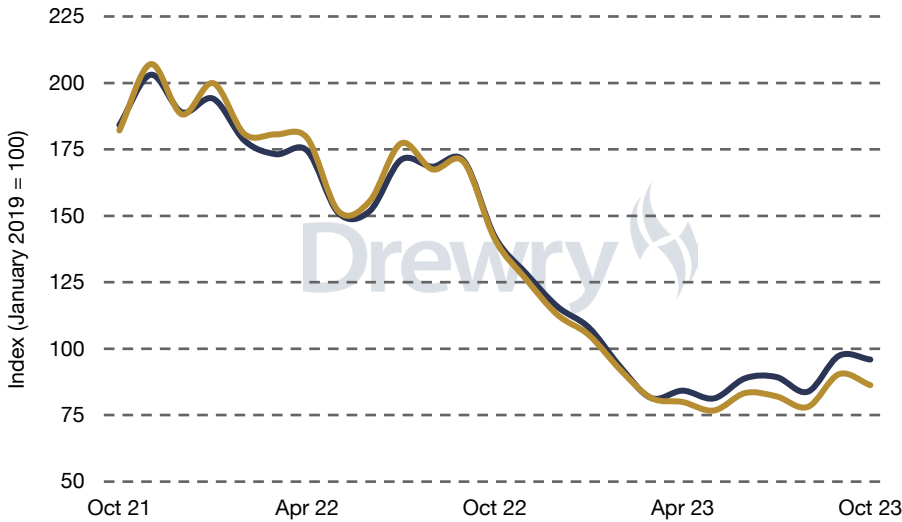
Oct 2023 comparisons	MoM	YoY
Call duration	-1.5%	-32.5%
Call duration per 1,000 teu	-4.6%	-38.9%

— Average total duration per vessel call

— Average total duration per 1,000 teu vessel capacity

Source: Drewry Maritime Research

North America average container port call duration
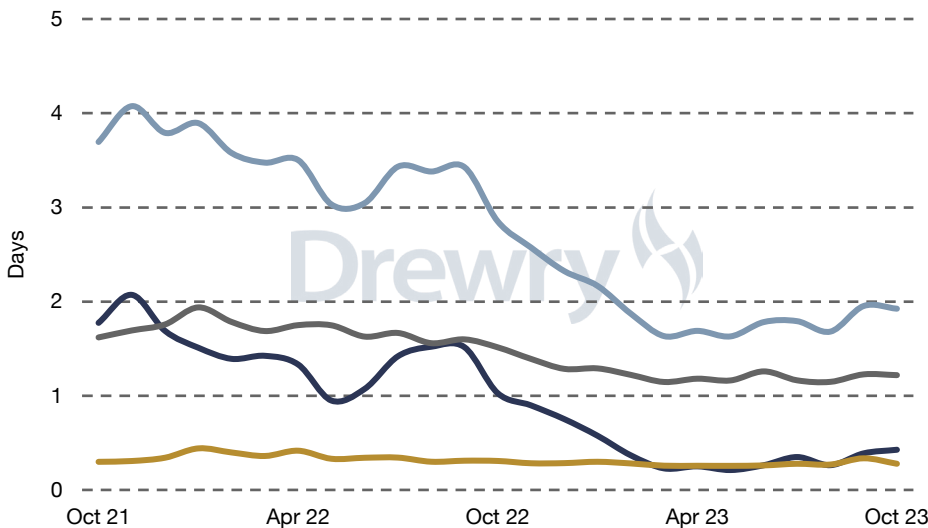
Oct 2023 comparisons	MoM	YoY
Pre-berth waiting	9.8%	-58.4%
Terminal	-0.7%	-19.5%
Other	-17.3%	-9.7%
Total	-1.5%	-32.5%

— Average pre-berth waiting
— Average terminal duration
— Average other duration
— Average total port call duration

Source: Drewry Maritime Research

Drewry

North America ports monitor

West Coast North America, pre-berth waiting time, October 2023

Prince Rupert ↔ 0.0 day

Vancouver ↓ 0.4 day

Canada

Tacoma ↓ 0.0 day

Seattle ↗ 0.2 day

North America
Average pre-berth waiting: 0.4 days
% variation vs 2019 average: +136%

USA

Oakland ↔ 0.2 day

Long Beach ↓ 0.1 day

Los Angeles ↗ 0.2 day

Mexico

Manzanillo ↔ 0.1 day

Lazaro Cardenas ↔ 0.2 day

🟢 >10% lower than regional average pre-berth waiting
🟡 Within +/- 10% than regional average pre-berth waiting
🔴 >10% higher than regional average pre-berth waiting

↓ MoM reduction in average pre-berth waiting
↔ Average pre-berth waiting stable MoM
↗ MoM increase in average pre-berth waiting

Source: Drewry Maritime Research

West Coast North America, mainline vessel performance for selected ports, October 2023
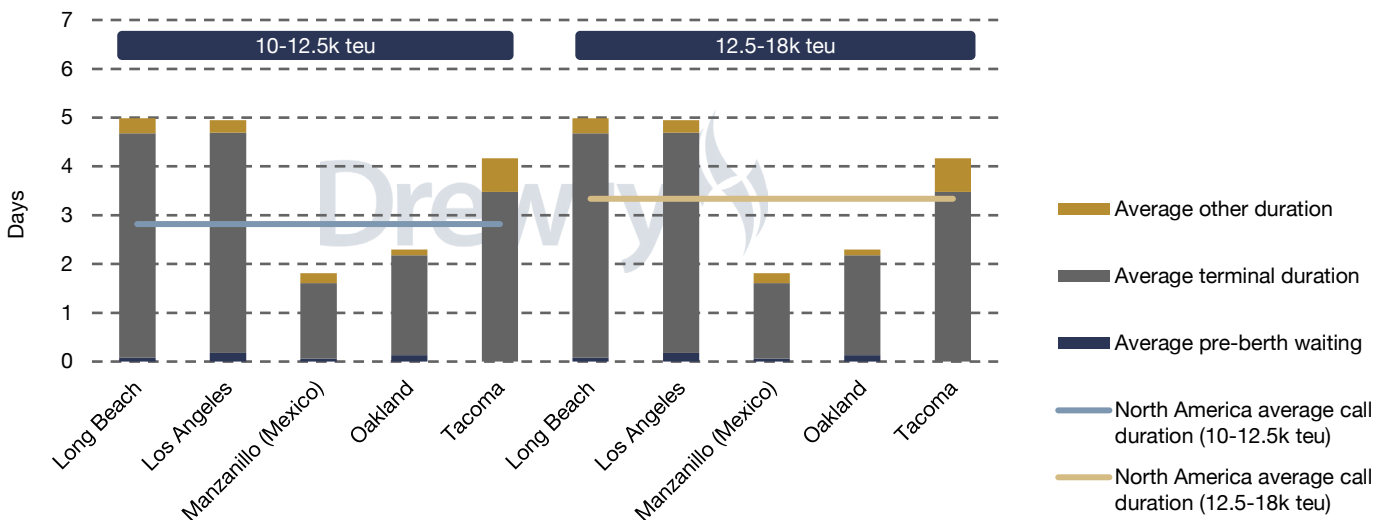
- Average other duration
- Average terminal duration
- Average pre-berth waiting
- North America average call duration (10-12.5k teu)
- North America average call duration (12.5-18k teu)

Notes:
(1) 'Other' includes navigation within the port and to/from anchorage zone and intermediate waiting incurred after initial terminal call.
(2) Regional average figures include larger number of ports than those detailed in the charts.

Source: Drewry Maritime Research

North America ports monitor

East and Gulf Coast North America, pre-berth waiting time, October 2023

Canada

Montreal
0.0 day

New York
0.2 day

North America
Average pre-berth waiting: 0.4 days
% variation vs 2019 average: +136%

Baltimore
0.5 day

Philadelphia
0.0 day

USA

Hampton Roads
0.4 day

Charleston
0.2 day

Mobile
0.1 day

Savannah
2.7 days

Mexico

Houston
0.4 day

Jacksonville
0.2 day

Port Everglades
0.1 day

Miami
0.0 day

Vera Cruz
0.1 day

Altamira
0.4 day

● >10% lower than regional average pre-berth waiting
● Within +/- 10% than regional average pre-berth waiting
● >10% higher than regional average pre-berth waiting

↘ MoM reduction in average pre-berth waiting
↔ Average pre-berth waiting stable MoM
↗ MoM increase in average pre-berth waiting

Source: Drewry Maritime Research

East and Gulf Coast North America, mainline vessel performance for selected ports, October 2023
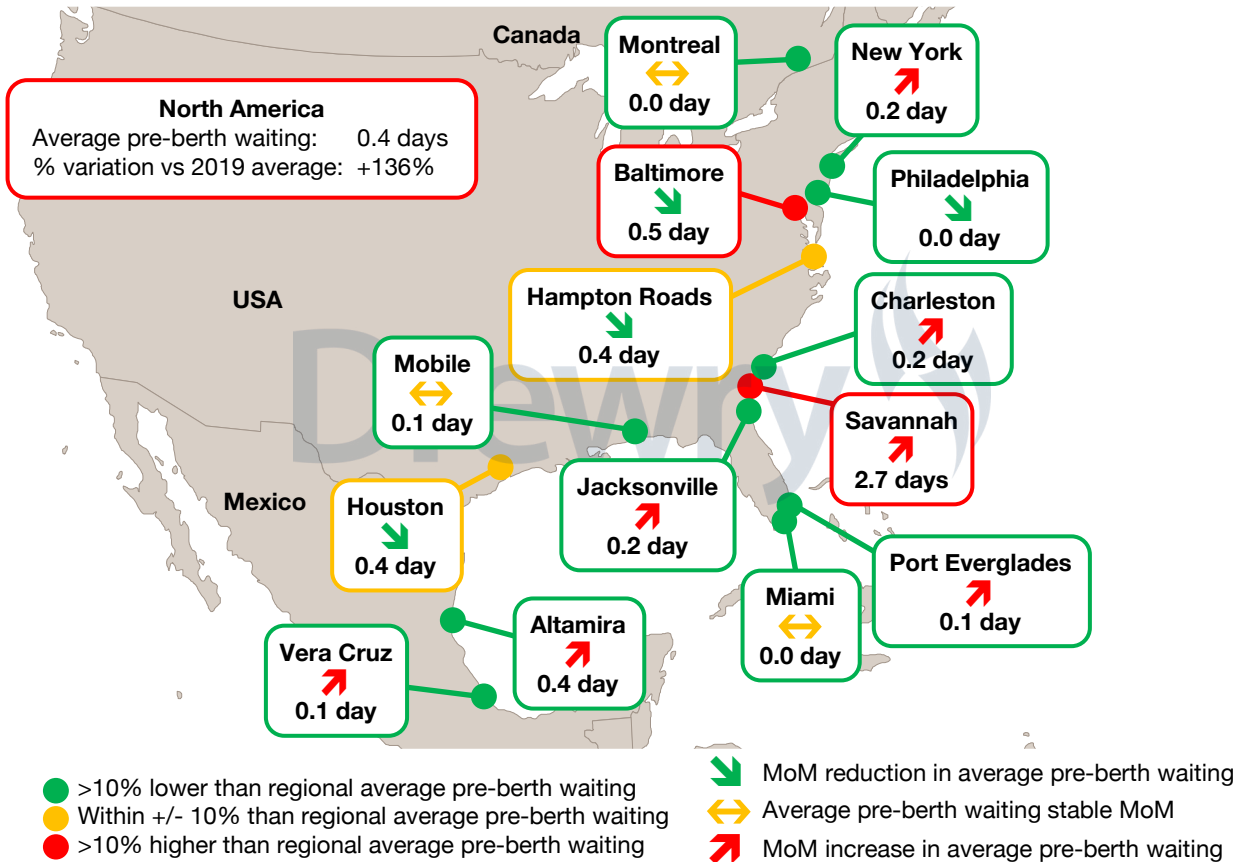

Notes:
(1) 'Other' includes navigation within the port and to/from anchorage zone and intermediate waiting incurred after initial terminal call.
(2) Regional average figures include larger number of ports than those detailed in the charts.
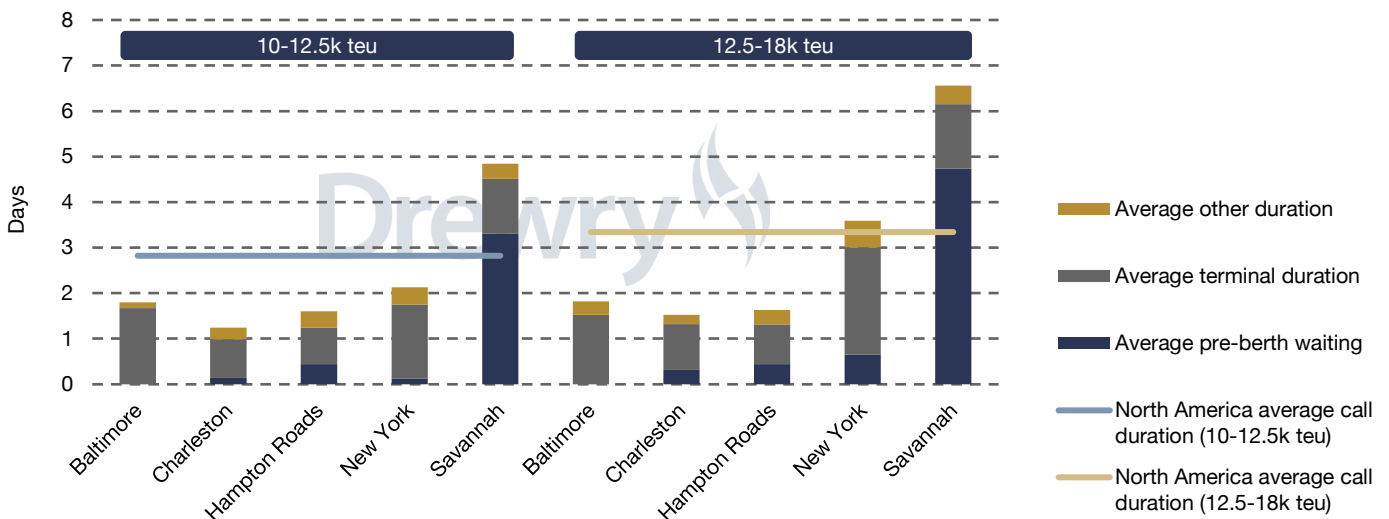
Source: Drewry Maritime Research

Drewry

Europe ports monitor

	Throughput		Port calls		Waiting		Terminal Time
	-0.7% YoY		-0.9% YoY		-13.3% MoM		1.7% MoM
					Positive		Negative

Overall performance improved, but pre-berthing delays have surged in Baltic ports in October

The Port Throughput Index for the region increased slightly in September; Drewry's Nowcasting Model indicates a decrease is likely to have happened in October.

Throughput and port calls

In September 2023, the European Container Port Throughput Index rose 1.2% MoM to 100.9 points, marking a 0.7% decrease from the previous year.

The rolling 12-month average growth rate lifted slightly to -5.7% in September 2023, up from -6.2% in August but significantly below the global average of -0.8%.

Northwest Europe continues its lacklustre performance, with volumes across the region falling MoM in September 2023. This stretches from Gdansk (down 18.3% MoM and 10.1% YoY), through Rotterdam (down 5.4% YoY) and Antwerp-Bruges (down 13.6%

YoY) to Valencia (down 5.3% YoY) and Marseille-Fos (down 18.4% YoY).

The Drewry Europe Container Port Call Index dipped 4.2% in October 2023, to 102.7 points.

Drewry's Nowcast Model predicts a decline in the Container Port Throughput Index to 98.5 points for October 2023, reflecting a 2.3% MoM decrease. The rolling 12-month growth rate is expected to have continued its recovery to -5.3%, which remains significantly lower than the global average of -1.1%.
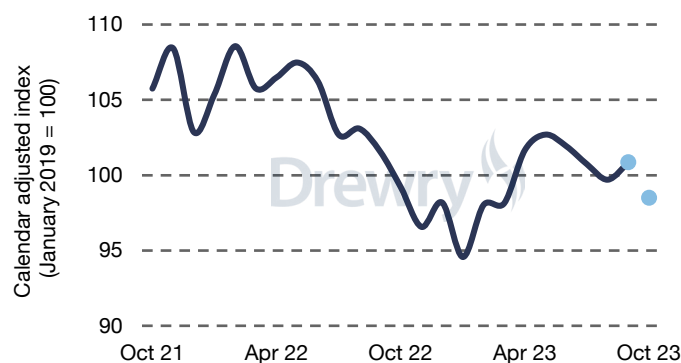
Performance

The Drewry Europe Container Port Performance Index improved further

in October 2023, reaching a new low of 94.7 points. Average pre-berth waiting time improved by 13.3% MoM, resulting in the overall decrease in total port call duration by 0.3% MoM to 1.3 days.

Most ports experienced moderate improvements in pre-berth waiting time in October, with some notable exceptions. Waiting time at Russia's Baltic Sea port in Kaliningrad surged 4,355% to 1.3 days (from 0 day in September). At Riga, Latvia it increased by 202% (to 0.2 day), at Gydnia, Poland, by 117% (to 0.2 day) and at Gdansk, Poland, by 22% (to 1.8 days).

Europe container port throughput and calls

Drewry Europe Container Port Throughput Index

Comparisons	MoM	YoY
Sep 2023	1.2%	-0.7%
Oct 2023 - nowcast	-2.3%	-0.7%

Europe rolling 12-month average growth rate
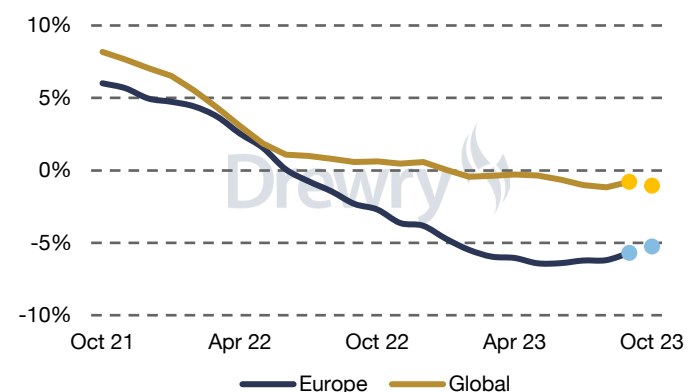
LTM growth rate	Europe	Global
Sep 2022	-2.3%	0.6%
Sep 2023	-5.7%	-0.8%
Oct 2022	-2.7%	0.6%
Oct 2023 - nowcast	-5.3%	-1.1%

Note: Performance for the most recent month is predicted using Drewry's Nowcast model which utilises AIS-based derived data on the capacity and duration of vessel calls to predict port activity levels.
Source: Drewry Maritime Research

Drewry

Europe ports monitor

Europe - growth / decline in port throughput

Legend:
- Sep-23
- Aug-23
- Jul-23
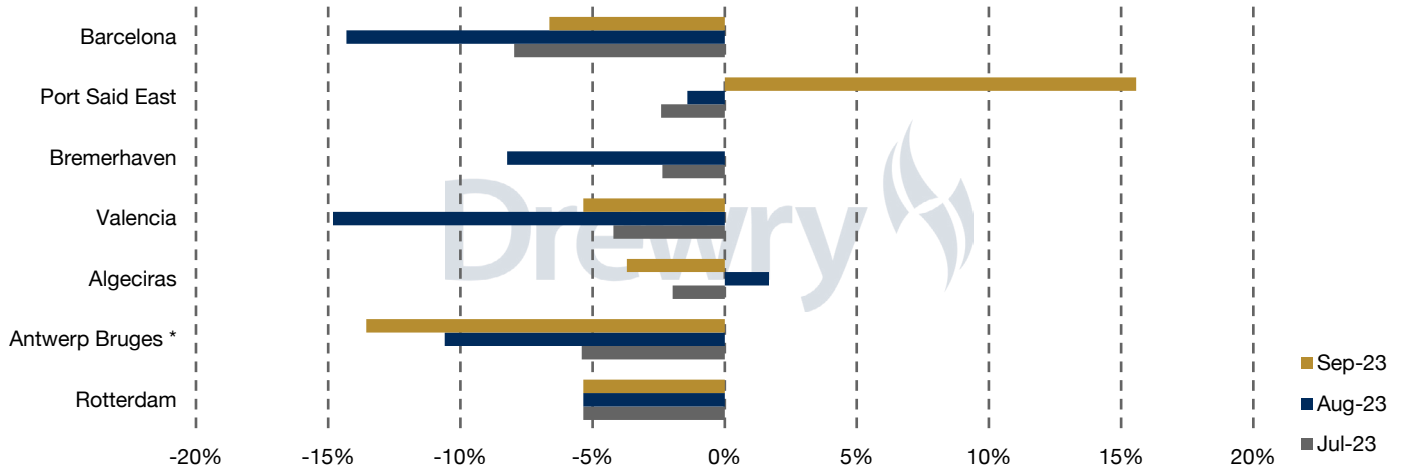
* The Belgian ports of Antwerp and Zeebrugge merged in April 2022 to form the Port of Antwerp-Bruges.

Source: Drewry Maritime Research

Drewry Europe Container Port Call Index

Oct 2023 comparisons	MoM	YoY
Vessel calls	-4.2%	-0.9%
Vessel capacity	-1.2%	8.1%

Legend:
- Number of vessel calls
- Capacity of vessel calls
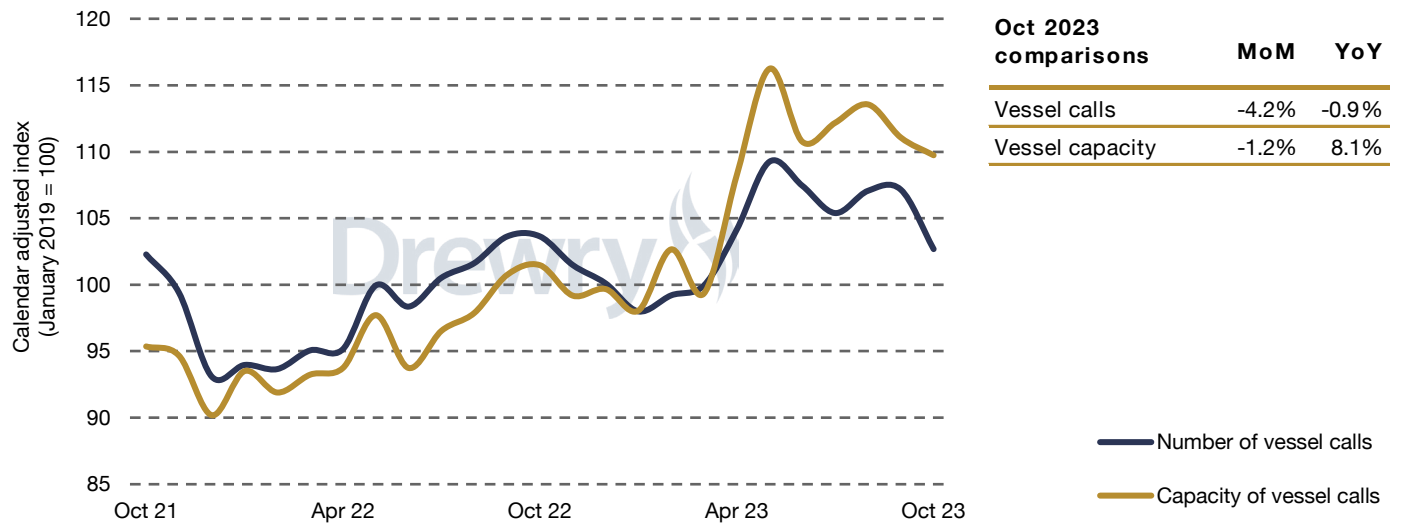
Source: Drewry Maritime Research

Drewry

Europe ports monitor

Drewry Europe container port performance

Drewry Europe Container Port Performance Index

Oct 2023 comparisons	MoM	YoY
Call duration	-0.2%	-3.4%
Call duration per 1,000 teu	-3.2%	-11.5%

Legend:
— Average total duration per vessel call
— Average total duration per 1,000 teu vessel capacity
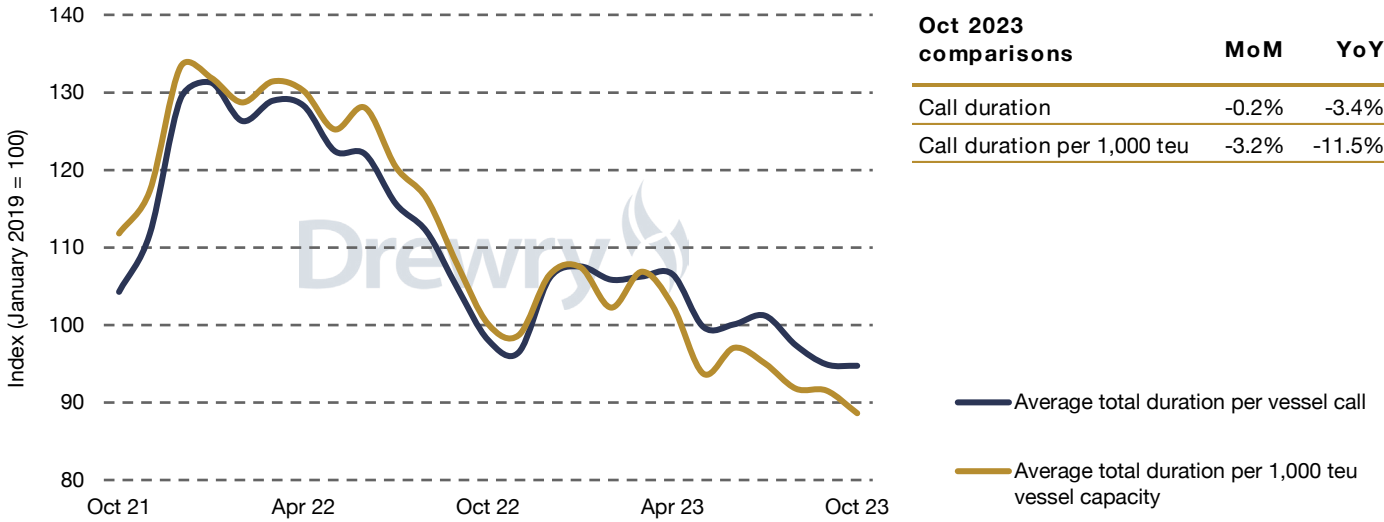
Source: Drewry Maritime Research

Europe average container port call duration

Oct 2023 comparisons	MoM	YoY
Pre-berth waiting	-13.3%	-1.8%
Terminal	1.7%	-5.3%
Other	6.4%	1.2%
Total	-0.2%	-3.4%

Legend:
— Average pre-berth waiting
— Average terminal duration
— Average other duration
— Average total port call duration
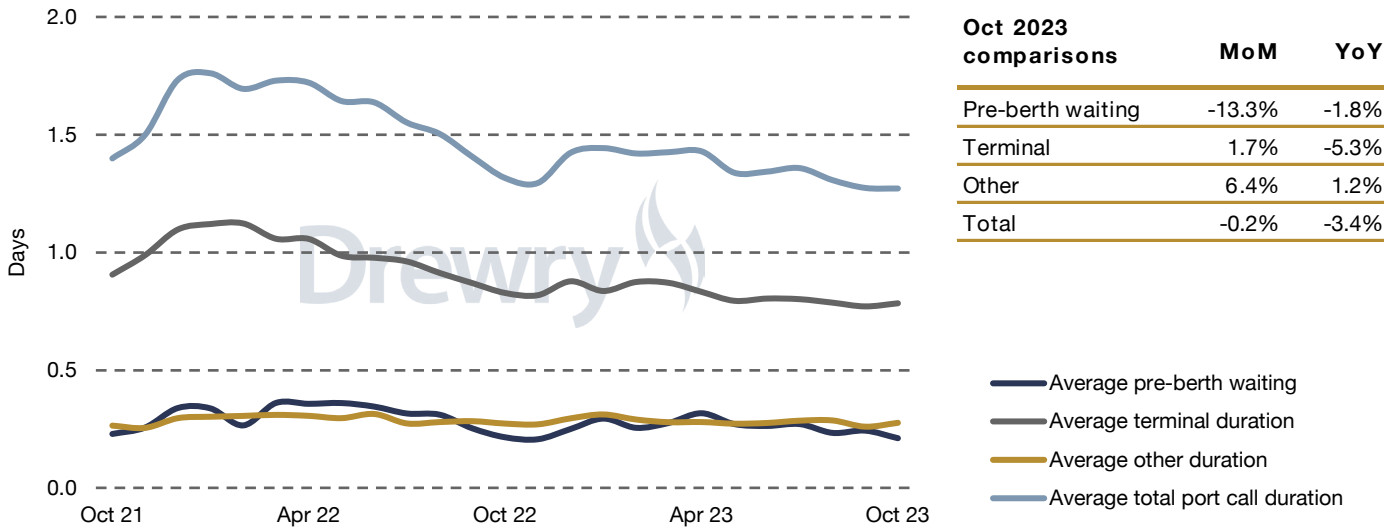
Source: Drewry Maritime Research

Drewry

Europe ports monitor

North West Europe, pre-berth waiting time, October 2023

- 🟢 >10% lower than regional average pre-berth waiting
- 🟡 Within +/- 10% than regional average pre-berth waiting
- 🔴 >10% higher than regional average pre-berth waiting

- ⬇️ MoM reduction in average pre-berth waiting
- ↔️ Average pre-berth waiting stable MoM
- ↗️ MoM increase in average pre-berth waiting
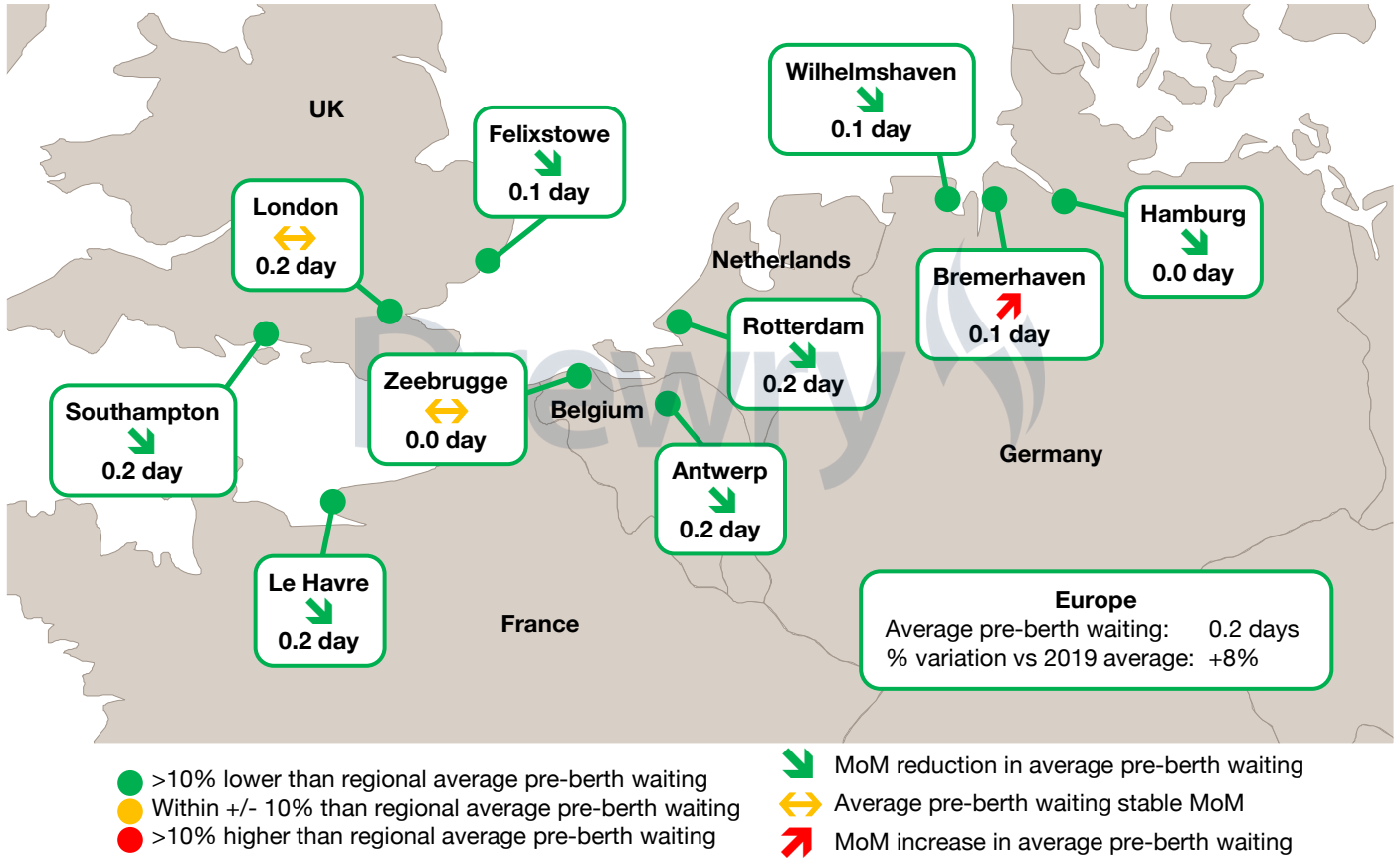
Source: Drewry Maritime Research

North Europe, mainline vessel performance for selected ports, October 2023
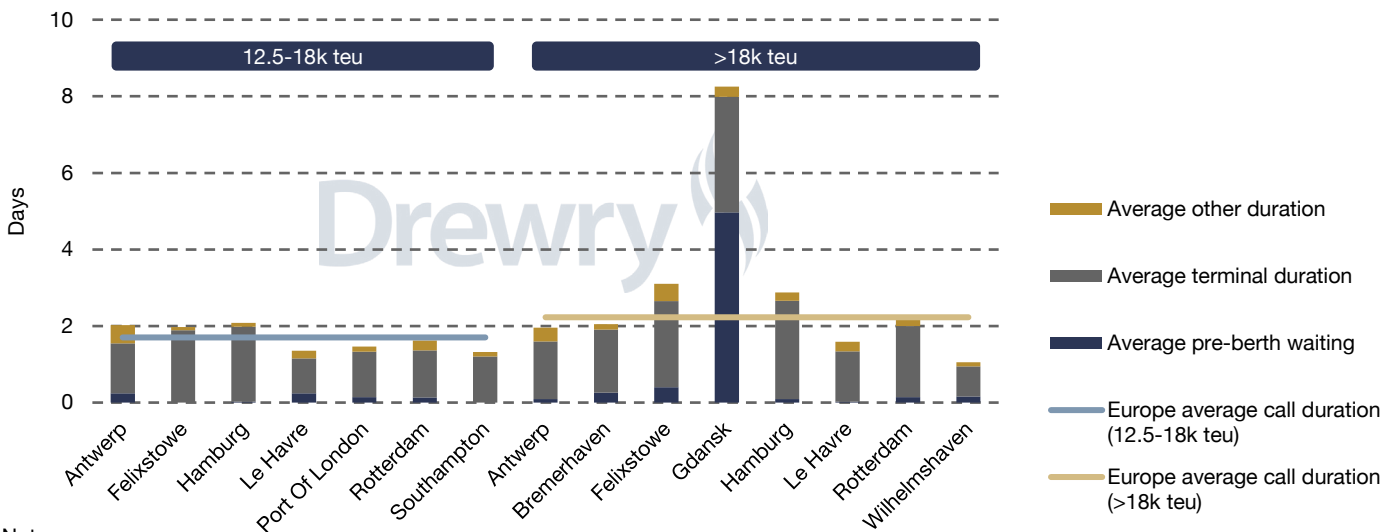
Notes:
(1) 'Other' includes navigation within the port and to/from anchorage zone and intermediate waiting incurred after initial terminal call.
(2) Regional average figures include larger number of ports than those detailed in the charts.

Source: Drewry Maritime Research

Drewry

Europe ports monitor

Scandinavia & Baltic, pre-berth waiting time, October 2023

Europe
Average pre-berth waiting: 0.2 days
% variation vs 2019 average: +8%

Finland

Sweden

Helsinki
0.0 day

Kotka
0.0 day

St Petersburg
0.2 day

Aarhus
0.0 day

Gothenburg
0.0 day

Russia

Denmark

Riga
0.2 day

Latvia

Gdynia
0.2 day

Klaipeda
0.0 day

Lithuania

Russia

Gdansk
1.8 days

Poland

Kaliningrad
1.3 days

- 🟢 >10% lower than regional average pre-berth waiting
- 🟡 Within +/- 10% than regional average pre-berth waiting
- 🔴 >10% higher than regional average pre-berth waiting

- ↘ MoM reduction in average pre-berth waiting
- ↔ Average pre-berth waiting stable MoM
- ↗ MoM increase in average pre-berth waiting

Source: Drewry Maritime Research

West Mediterranean, pre-berth waiting time, October 2023

Europe
Average pre-berth waiting: 0.2 days
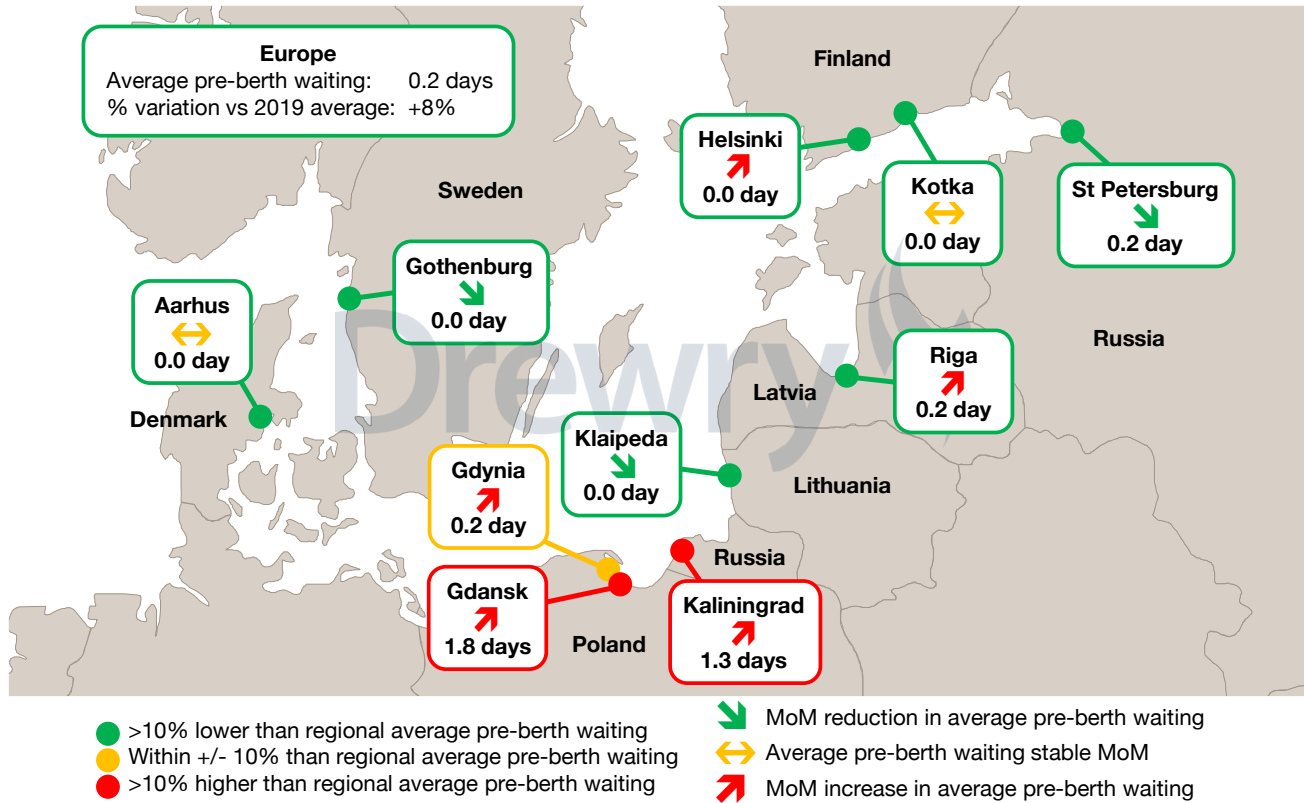% variation vs 2019 average: +8%

France

La Spezia
0.3 day

Genoa
0.1 day

Barcelona
0.1 day

Marseille Fos
0.0 day

Italy

Portugal

Spain

Gioia Tauro
0.1 day

Sines
0.0 day

Valencia
0.1 day

Algeciras
0.0 day

Marsaxlokk
0.2 day

Malta

- 🟢 >10% lower than regional average pre-berth waiting
- 🟡 Within +/- 10% than regional average pre-berth waiting
- 🔴 >10% higher than regional average pre-berth waiting

- ↘ MoM reduction in average pre-berth waiting
- ↔ Average pre-berth waiting stable MoM
- ↗ MoM increase in average pre-berth waiting

Source: Drewry Maritime Research

Drewry

Europe ports monitor

East Mediterranean & Black Sea, pre-berth waiting time, October 2023

Port	Waiting	Port	Waiting
Koper	0.1 day	Novorossiysk	0.0 day
Asyaport	0.3 day	Poti	1.2 days
Ambarli	0.2 day	Yarimca	0.0 day
Yilport	0.0 day	Gemlik	0.1 day
Evyap	0.1 day	Mersin	1.7 days
Nemrut Bay	0.0 day	Beirut	0.2 day
Piraeus	0.3 day	Port Said	0.1 day
Damietta	2.5 days	Haifa	0.2 day
Alexandria	0.4 day	Port Said East	0.2 day
		Ashdod	0.2 day

Europe
Average pre-berth waiting: 0.2 days
% variation vs 2019 average: +8%

- 🟢 >10% lower than regional average pre-berth waiting
- 🟡 Within +/- 10% than regional average pre-berth waiting
- 🔴 >10% higher than regional average pre-berth waiting
- ⬇ MoM reduction in average pre-berth waiting
- ↔ Average pre-berth waiting stable MoM
- ↗ MoM increase in average pre-berth waiting

Source: Drewry Maritime Research

South Europe, mainline vessel performance for selected ports, October 2023

Legend:
- Average other duration
- Average terminal duration
- Average pre-berth waiting
- Europe average call duration (12.5-18k teu)
- Europe average call duration (>18k teu)

12.5-18k teu: Barcelona, Genoa, Gioia Tauro, La Spezia, Marseilles-Fos, Piraeus, Port Said East, Valencia
>18k teu: Algeciras, Ambarli, Asyaport, Barcelona, Gioia Tauro, Piraeus, Port Said East, Valencia

Notes:
(1) 'Other' includes navigation within the port and to/from anchorage zone and intermediate waiting incurred after initial terminal call.
(2) Regional average figures include larger number of ports than those detailed in the charts.
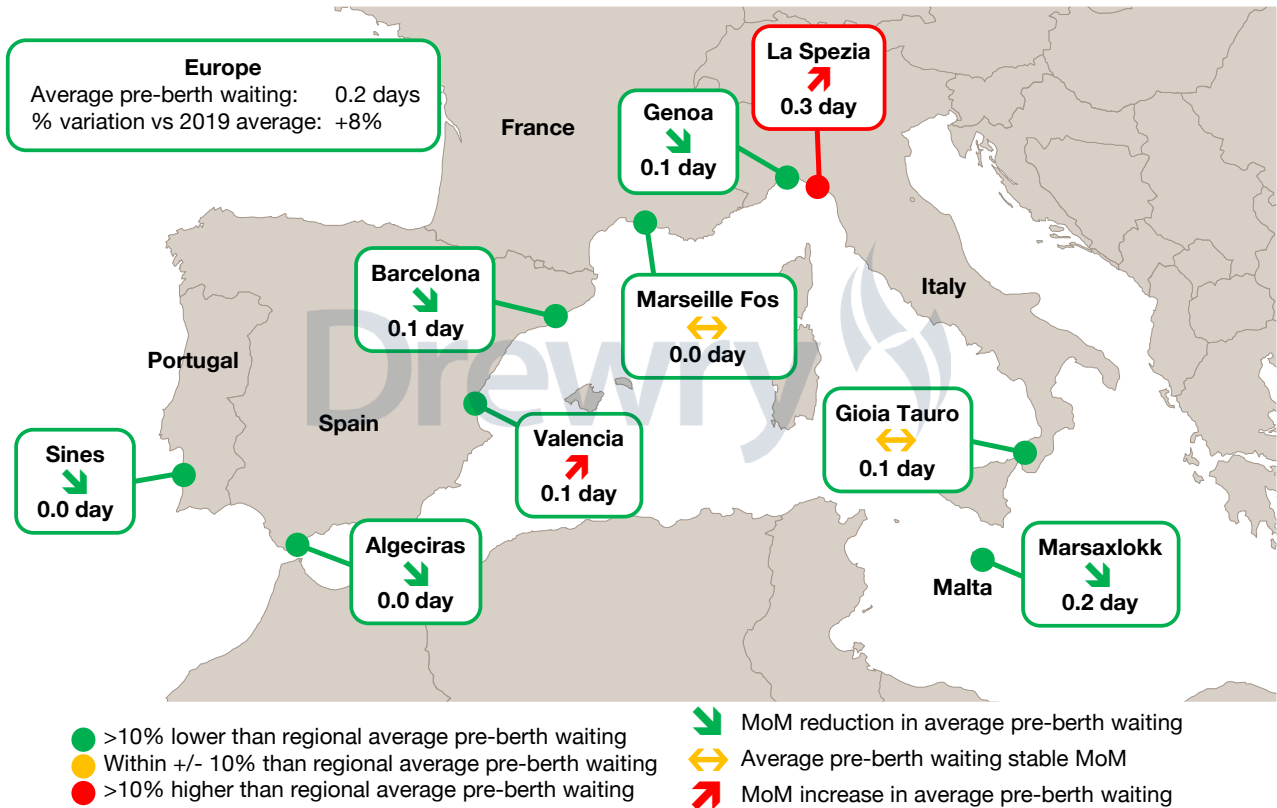
Source: Drewry Maritime Research

Drewry

Middle East & South Asia ports monitor

	Throughput		Port calls		Waiting		Terminal Time
	5.5% YoY		-2.0% YoY		22.2% MoM		1.6% MoM
					Negative		Negative

Performance worsens as pre-berth waiting time increases 22.2% MoM

Regional volumes decreased in September but are still well ahead of 2022 numbers. Indian ports are showing strong growth compared to last year.

Throughput and port calls

The Middle East and South Asia Container Port Throughput Index fell 1.5% MoM in September 2023 to 113.4 points, an increase of 5.5% YoY.

The 12-month rolling average growth rate improved further to 2.3% in September 2023, well ahead of the -0.8% global growth rate.

Indian port volumes in September fell 7.6% MoM but remained up 11.7% YoY, based largely on solid growth from the two big West Coast ports, Mundra and Jawaharlal Nehru Port.

Elsewhere in the region, Salalah volumes are down 18.9% YoY. This decline has been consistent over the past six months,

in line with the temporary reduction in capacity during the terminal upgrade project – set to be completed by 1Q25.

The Middle East and South Asia Container Port Call Index fell again in October 2023, decreasing 6.0% MoM to 130.3 points.

Drewry's Nowcast Model indicates that the port throughput index is likely to have dropped 3.8% MoM to 109.1 points in October 2023, although it was up 3.0% YoY.

Performance

Call duration in the Middle East and South Asia increased by 4.4% MoM, largely from a 22.2% MoM rise in average pre-berth waiting time. The average total

port call duration across the sample of regional ports rose to 1.4 days in October compared to 1.3 days in September.

Pre-berth waiting time worsened at Jebel Ali in October, up 41% to 0.6 day. Bandar Abbas in the Middle East and Chittagong in South Asia remain the only ports in the region showing elevated pre-berth waiting times, 1.4 days and 0.6 day, respectively, the same as in September 2023.

Pre-berth waiting time across the sample ports in the region and across different vessel sizes are uniformly low, except for neo-Panamax vessels at Khalifa Port (1.3 days) and Port Qasim (3.9 days).

Middle East and South Asia container port throughput and calls

Drewry Middle East & South Asia Container Port Throughput Index
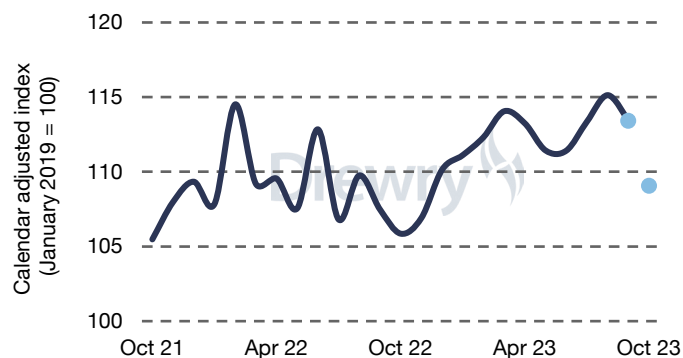
**Middle East & South Asia rolling 12-month average growth rate**

Middle East & S.Asia — Global
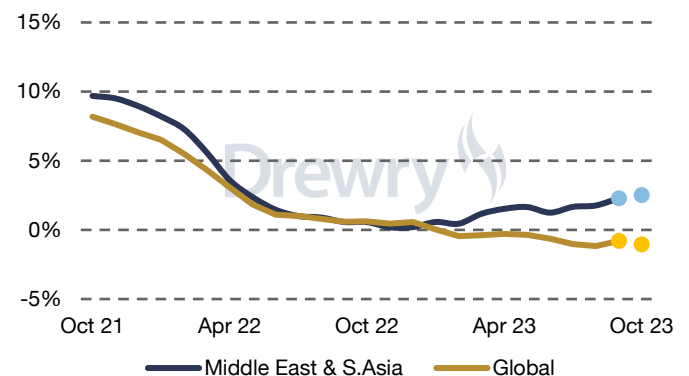
Comparisons	MoM	YoY
Sep 2023	-1.5%	5.5%
Oct 2023 - nowcast	-3.8%	3.0%

LTM growth rate	Middle East & S.Asia	Global
Sep 2022	0.6%	0.6%
Sep 2023	2.3%	-0.8%
Oct 2022	0.6%	0.6%
Oct 2023 - nowcast	2.5%	-1.1%

Note: Performance for the most recent month is predicted using Drewry's Nowcast model which utilises AIS-based derived data on the capacity and duration of vessel calls to predict port activity levels.
Source: Drewry Maritime Research

Drewry

Middle East & South Asia ports monitor

Middle East & South Asia - growth / decline in port throughput
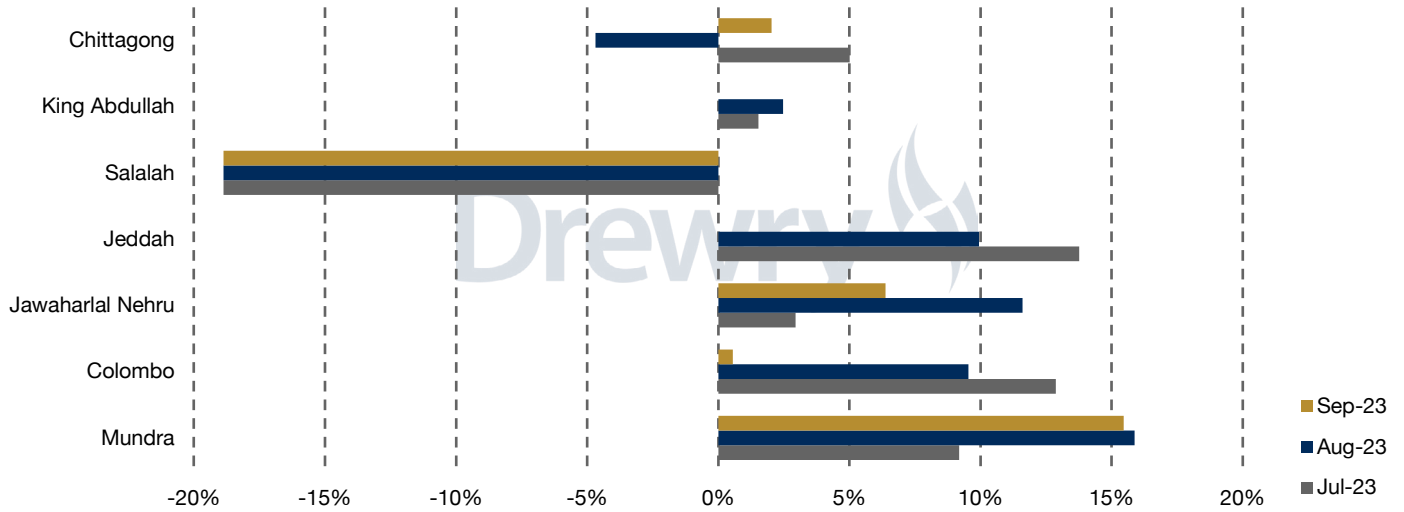
Legend:
- Sep-23
- Aug-23
- Jul-23

Source: Drewry Maritime Research

Drewry Middle East & South Asia Container Port Call Index
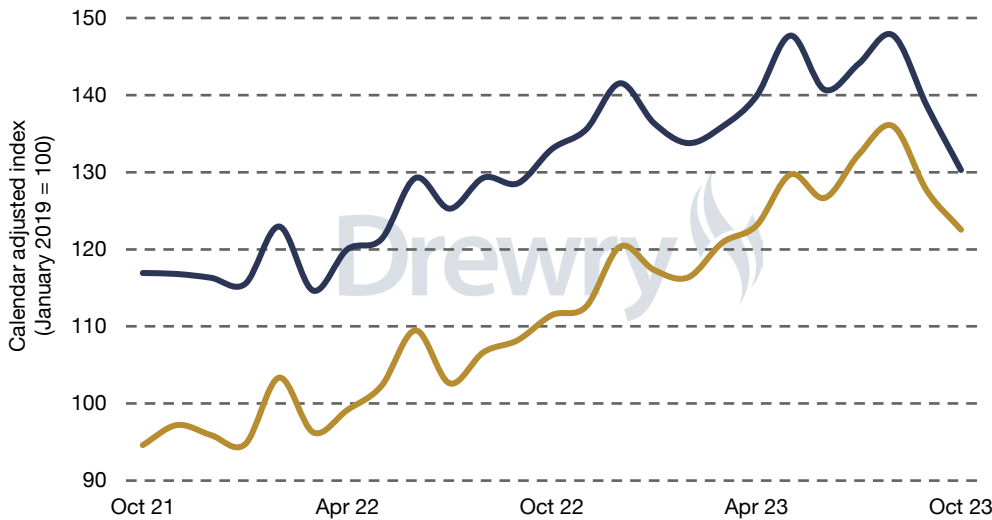
Oct 2023 comparisons	MoM	YoY
Vessel calls	-6.0%	-2.0%
Vessel capacity	-4.0%	9.9%

Legend:
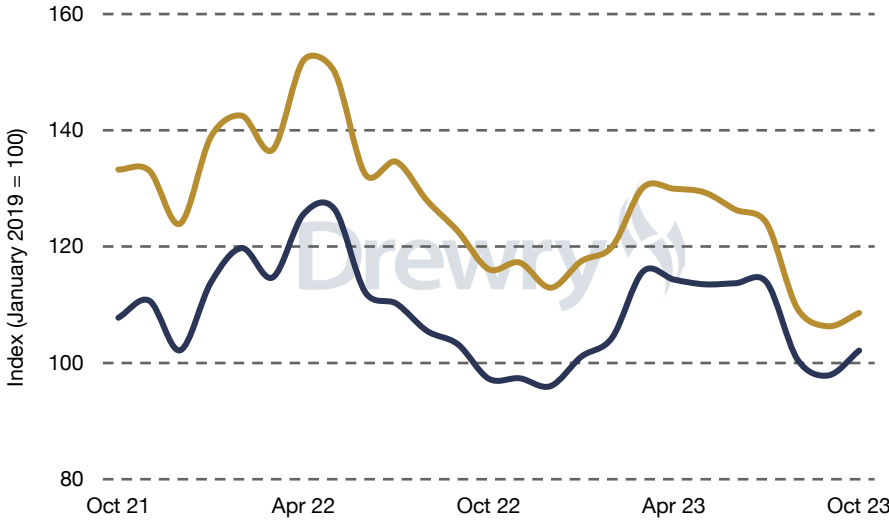- Number of vessel calls
- Capacity of vessel calls

Source: Drewry Maritime Research

Drewry

Middle East & South Asia ports monitor

Drewry Middle East & South Asia container port performance

Drewry Middle East & South Asia Port Container Port Performance Index

Oct 2023 comparisons	MoM	YoY
Call duration	4.4%	5.0%
Call duration per 1,000 teu	2.2%	-6.5%

— Average total duration per vessel call

— Average total duration per 1,000 teu vessel capacity

Source: Drewry Maritime Research

Middle East & South Asia average container port call duration
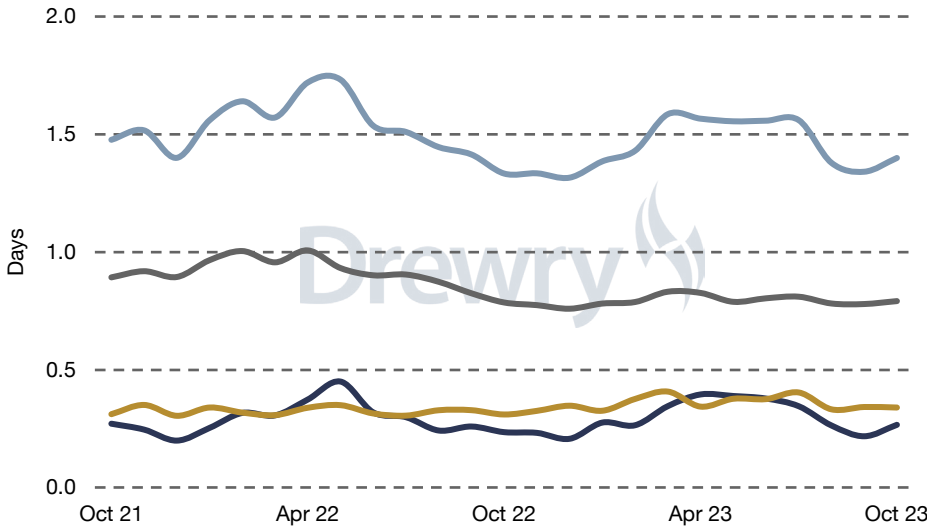
Oct 2023 comparisons	MoM	YoY
Pre-berth waiting	22.2%	13.2%
Terminal	1.6%	0.7%
Other	-0.7%	9.4%
Total	4.4%	5.0%

— Average pre-berth waiting
— Average terminal duration
— Average other duration
— Average total port call duration

Source: Drewry Maritime Research

Drewry

Middle East & South Asia ports monitor

Middle East, pre-berth waiting time, October 2023

Iraq

Jordan

Iran

Aqaba
↔
0.0 day

Umm Qasr
↗
0.3 day

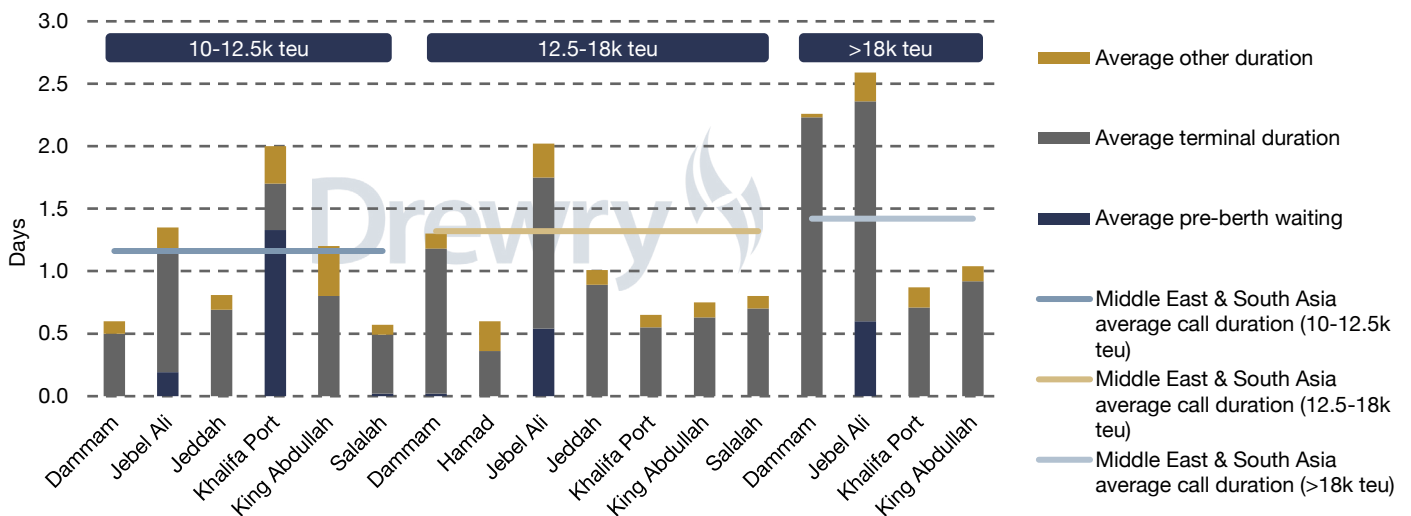**Bandar Abbas**
↔
1.4 days

Saudi Arabia

Hamad
↗
0.1 day

Dammam
↗
0.1 day

Bahrain

Jebel Ali
↗
0.6 day

King Abdullah
↘
0.0 day

UAE

Khalifa Port
↔
0.2 day

Jeddah
↘
0.0 day

Oman

Middle East & South Asia
Average pre-berth waiting: 0.3 days
% variation vs 2019 average: -19%

Salalah
↘
0.1 day

- 🟢 >10% lower than regional average pre-berth waiting
- 🟡 Within +/- 10% than regional average pre-berth waiting
- 🔴 >10% higher than regional average pre-berth waiting

- ↘ MoM reduction in average pre-berth waiting
- ↔ Average pre-berth waiting stable MoM
- ↗ MoM increase in average pre-berth waiting

Source: Drewry Maritime Research

Middle East, mainline vessel performance for selected ports, October 2023

Legend:
- Average other duration
- Average terminal duration
- Average pre-berth waiting
- Middle East & South Asia average call duration (10-12.5k teu)
- Middle East & South Asia average call duration (12.5-18k teu)
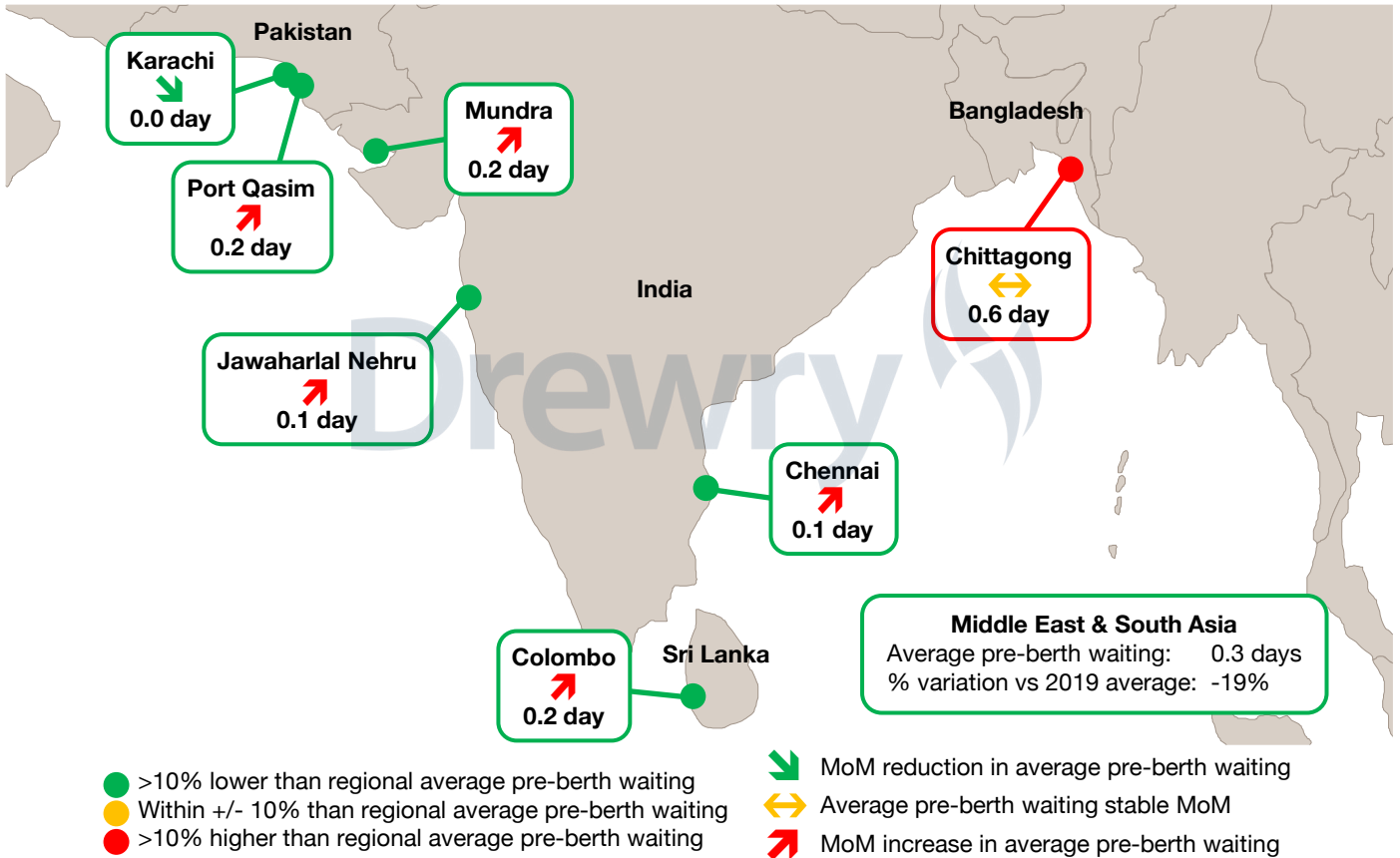- Middle East & South Asia average call duration (>18k teu)

Notes:
(1) 'Other' includes navigation within the port and to/from anchorage zone and intermediate waiting incurred after initial terminal call.
(2) Regional average figures include larger number of ports than those detailed in the charts.

Source: Drewry Maritime Research

Drewry

Middle East & South Asia ports monitor

South Asia, pre-berth waiting time, October 2023

Pakistan

Karachi
0.0 day

Mundra
0.2 day

Port Qasim
0.2 day

Bangladesh

Chittagong
0.6 day

India

Jawaharlal Nehru
0.1 day

Chennai
0.1 day

Colombo
0.2 day

Sri Lanka

Middle East & South Asia
Average pre-berth waiting: 0.3 days
% variation vs 2019 average: -19%

● >10% lower than regional average pre-berth waiting
● Within +/- 10% than regional average pre-berth waiting
● >10% higher than regional average pre-berth waiting

↘ MoM reduction in average pre-berth waiting
↔ Average pre-berth waiting stable MoM
↗ MoM increase in average pre-berth waiting

Source: Drewry Maritime Research

South Asia, mainline vessel performance for selected ports, October 2023

Notes:
(1) 'Other' includes navigation within the port and to/from anchorage zone and intermediate waiting incurred after initial terminal call.
(2) Regional average figures include larger number of ports than those detailed in the charts.
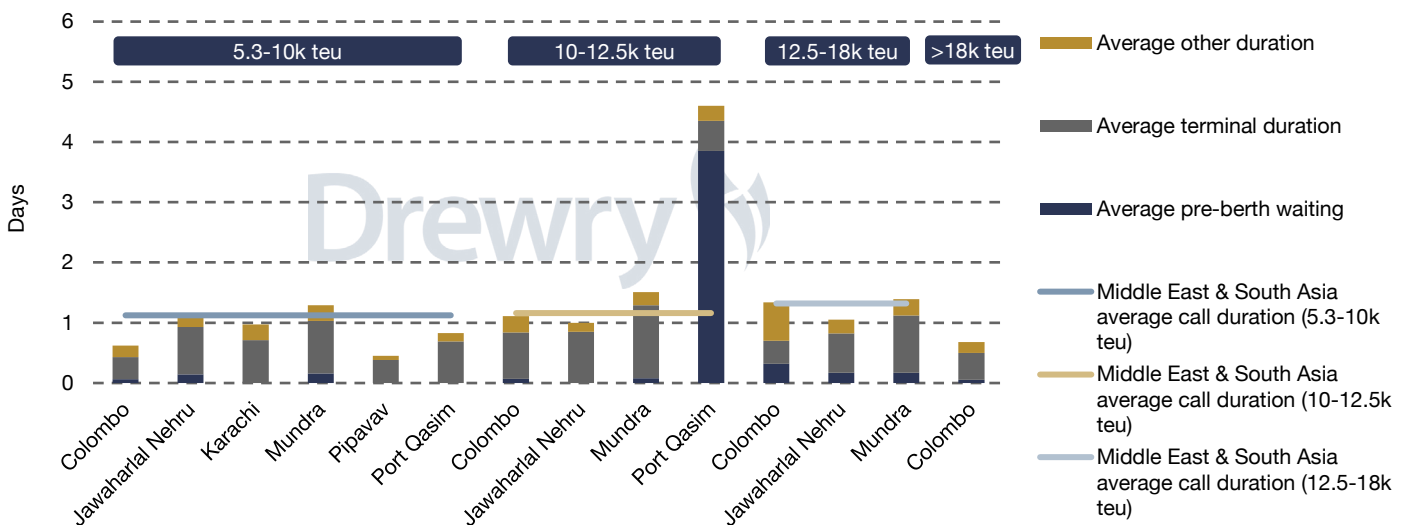
Source: Drewry Maritime Research

Drewry

Latin America ports monitor

	Throughput		Port calls		Waiting		Terminal Time
	0.1% YoY		2.9% YoY		8.7% MoM		1.9% MoM
					Negative		**Negative**

The Container Port Throughput Index hits new high of 129.8 points in September 2023

Average performance across Latin America worsened in October with pre-berth waiting time increasing at Brazilian ports, in particular.

Throughput and port calls

The Latin America Container Port Throughput Index rose 1.0% MoM to its highest point in over two years, to 129.8 points in September 2023, up 0.1% YoY.

The rolling 12-month average growth rate continued to soften, reaching 0.4% in September 2023, down from 0.9% in August 2023.

In Central America, monthly gains in throughput at the Manzanillo and Balboa terminals were offset by losses at the Evergreen, Rodman and Cristobal terminals. Overall, Panama volumes in September 2023 were flat MoM and YoY. The prolonged drought impacting the operation of the Panama Canal is set to continue for the rest of the year and into early 2024, although due to predictable schedules container shipping is less likely to be affected than the bulk shipping sector.

In Brazil, September 2023 volume gains at Itapoa and Paranagua could not cover the losses at Itajai and Santos (down 18.3% YoY). Overall, Brazil volumes in September 2023 were down 10.9% YoY and 7.0% MoM.

The Latin America Container Port Call Index fell from last month's level, down 3.2% MoM in October 2023 to 102.9 points.

Drewry's Nowcast Model indicates that the Port Throughput Index will have fallen back slightly in October 2023 to 128.1 points, a decrease of 1.3% MoM.
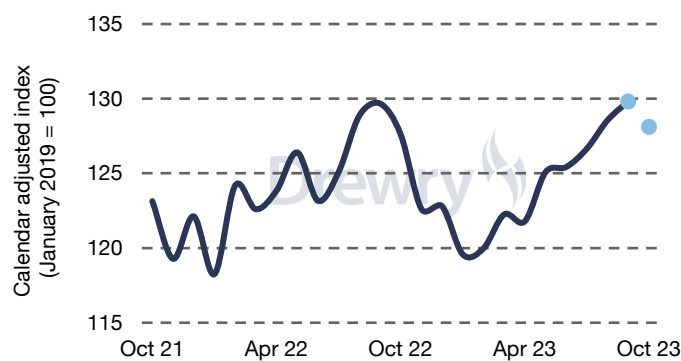
Performance

Port time worsened in October 2023, with Drewry's Latin America Container Port Performance Index increasing 3.1% MoM to 135.6. At 1.2 days, the average call duration is 3.0% higher than in October 2022.

Congestion at all main Brazilian ports worsened in October 2023, with average pre-berth waiting time increasing 14% at Santos (to 0.5 day), 15% at Itapoa (to 0.3 day), 113% at Paranagua (to 0.8 day) and 80% at Itajai (to 2.6 days).
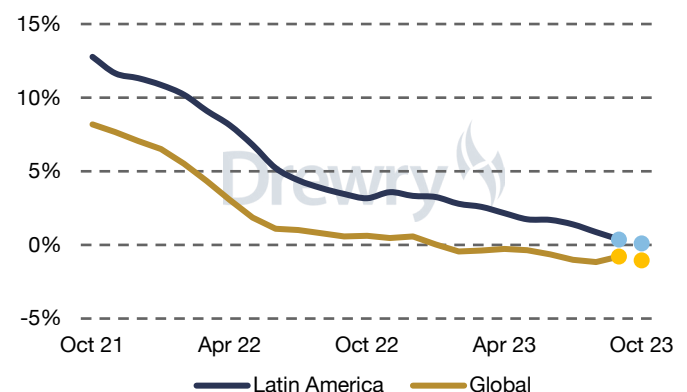
Latin America container port throughput and calls

Drewry Latin America Container Port Throughput Index

Comparisons	MoM	YoY
Sep 2023	1.0%	0.1%
Oct 2023 - nowcast	-1.3%	0.4%

Latin America rolling 12-month average growth rate

LTM growth rate	Latin America	Global
Sep 2022	3.5%	0.6%
Sep 2023	0.4%	-0.8%
Oct 2022	3.2%	0.6%
Oct 2023 - nowcast	0.1%	-1.1%

Note: Performance for the most recent month is predicted using Drewry's Nowcast model which utilises AIS-based derived data on the capacity and duration of vessel calls to predict port activity levels.
Source: Drewry Maritime Research

Latin America ports monitor

Latin America - growth / decline in port throughput
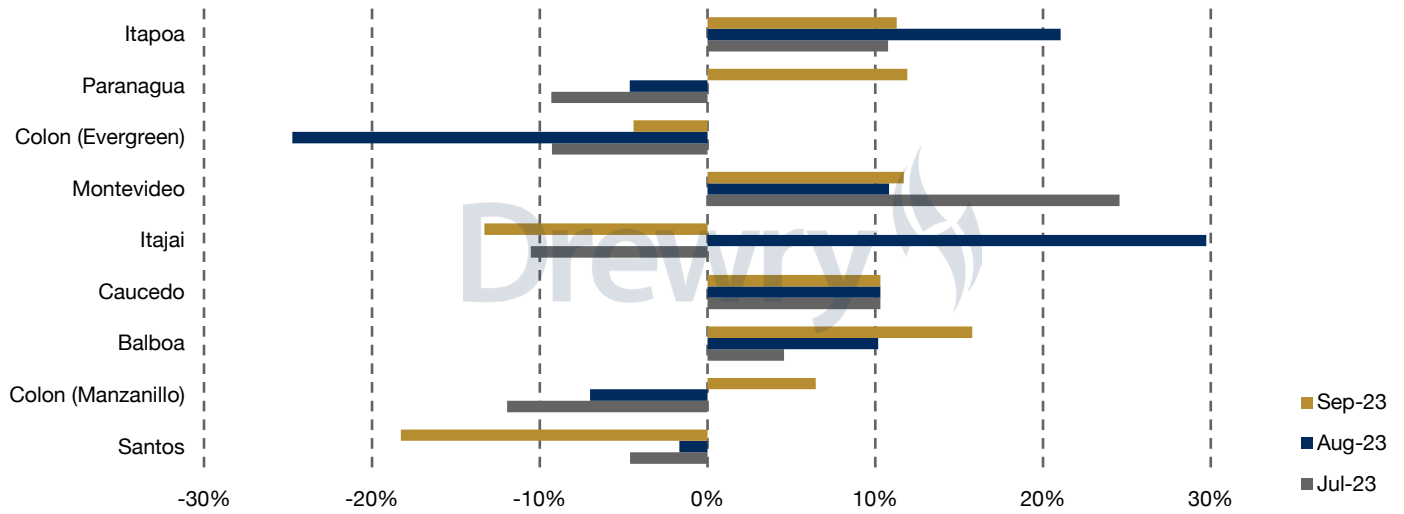
Legend:
- Sep-23
- Aug-23
- Jul-23

Source: Drewry Maritime Research

Drewry Latin America Container Port Call Index

Oct 2023 comparisons	MoM	YoY
Vessel calls	-3.2%	2.9%
Vessel capacity	-1.4%	9.0%

Legend:
- Number of vessel calls
- Capacity of vessel calls
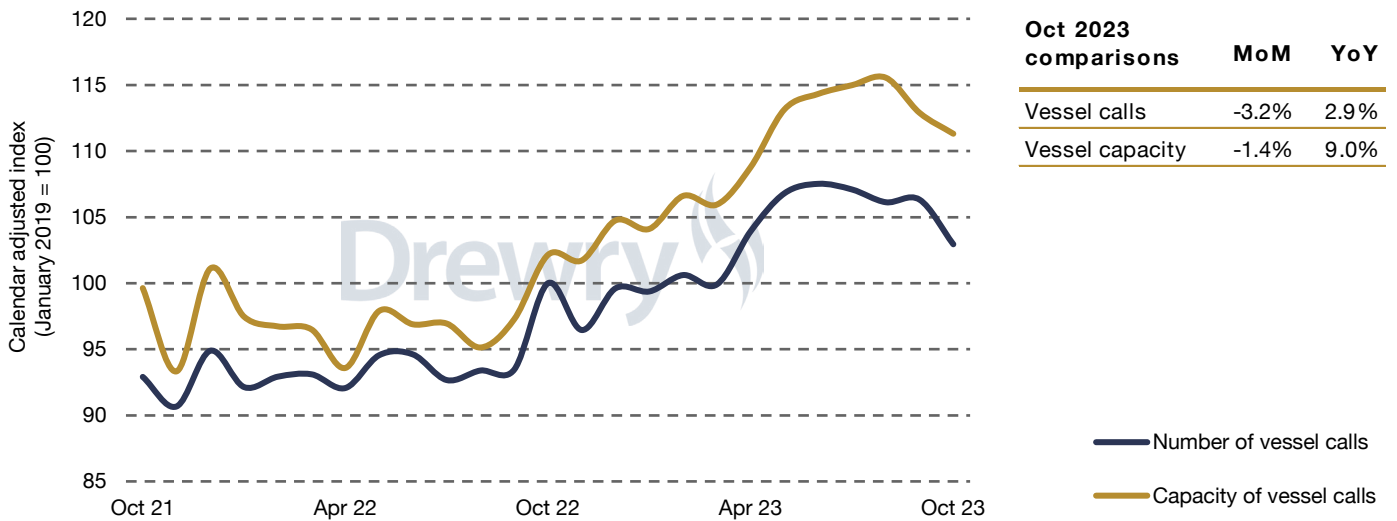
Source: Drewry Maritime Research

Drewry

Latin America ports monitor

Drewry Latin America container port performance

Drewry Latin America Container Port Performance Index
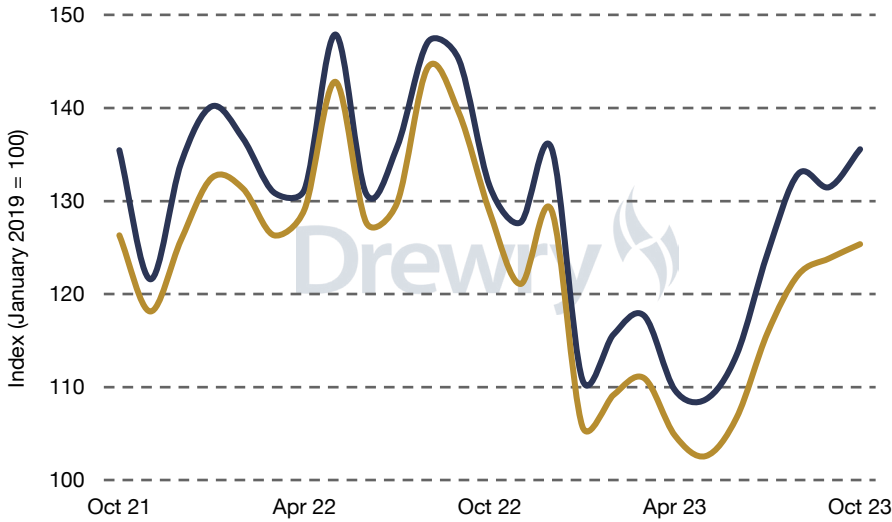
Oct 2023 comparisons	MoM	YoY
Call duration	3.1%	3.0%
Call duration per 1,000 teu	1.2%	-2.7%

— Average total duration per vessel call

— Average total duration per 1,000 teu vessel capacity

Source: Drewry Maritime Research

Latin America average container port call duration
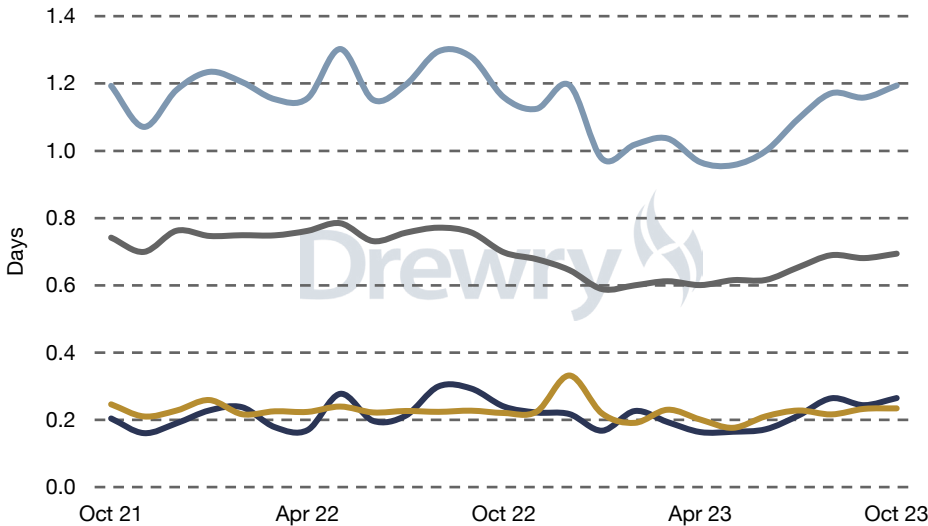
Oct 2023 comparisons	MoM	YoY
Pre-berth waiting	8.7%	10.5%
Terminal	1.9%	-0.5%
Other	0.6%	6.2%
Total	3.1%	3.0%

— Average pre-berth waiting
— Average terminal duration
— Average other duration
— Average total port call duration

Source: Drewry Maritime Research

Drewry

Latin America ports monitor

Central America/Caribbean, pre-berth waiting time, October 2023

Latin America
Average pre-berth waiting: 0.3 days
% variation vs 2019 average: +70%

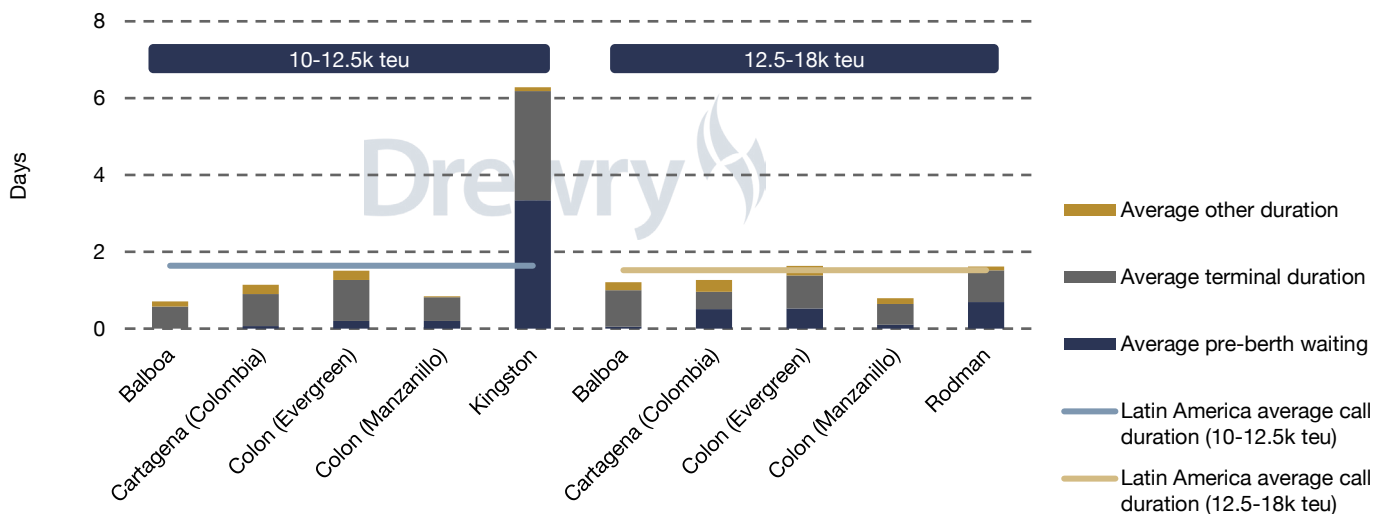| Port	Value
Freeport (Bahamas)	0.0 day
Kingston (Jamaica)	0.8 day
San Juan (Puerto Rico)	0.0 day
Santo Tomas De Castilla	0.0 day
Puerto Barrios	0.2 day
Puerto Cortes	0.1 day
Caucedo	0.1 day
Puerto Quetzal	0.2 day
Colon (Cristobal)	0.2 day
Colon (Evergreen)	0.2 day
Colon (Manzanillo)	0.1 day
Puerto Limon	0.0 day
Cartagena	0.1 day
Rodman	0.3 day
Balboa	0.2 day

- 🟢 >10% lower than regional average pre-berth waiting
- 🟡 Within +/- 10% than regional average pre-berth waiting
- 🔴 >10% higher than regional average pre-berth waiting

- ↘ MoM reduction in average pre-berth waiting
- ↔ Average pre-berth waiting stable MoM
- ↗ MoM increase in average pre-berth waiting

Source: Drewry Maritime Research

Central America/Caribbean, mainline vessel performance for selected ports, October 2023

Legend:
- Average other duration
- Average terminal duration
- Average pre-berth waiting
- Latin America average call duration (10-12.5k teu)
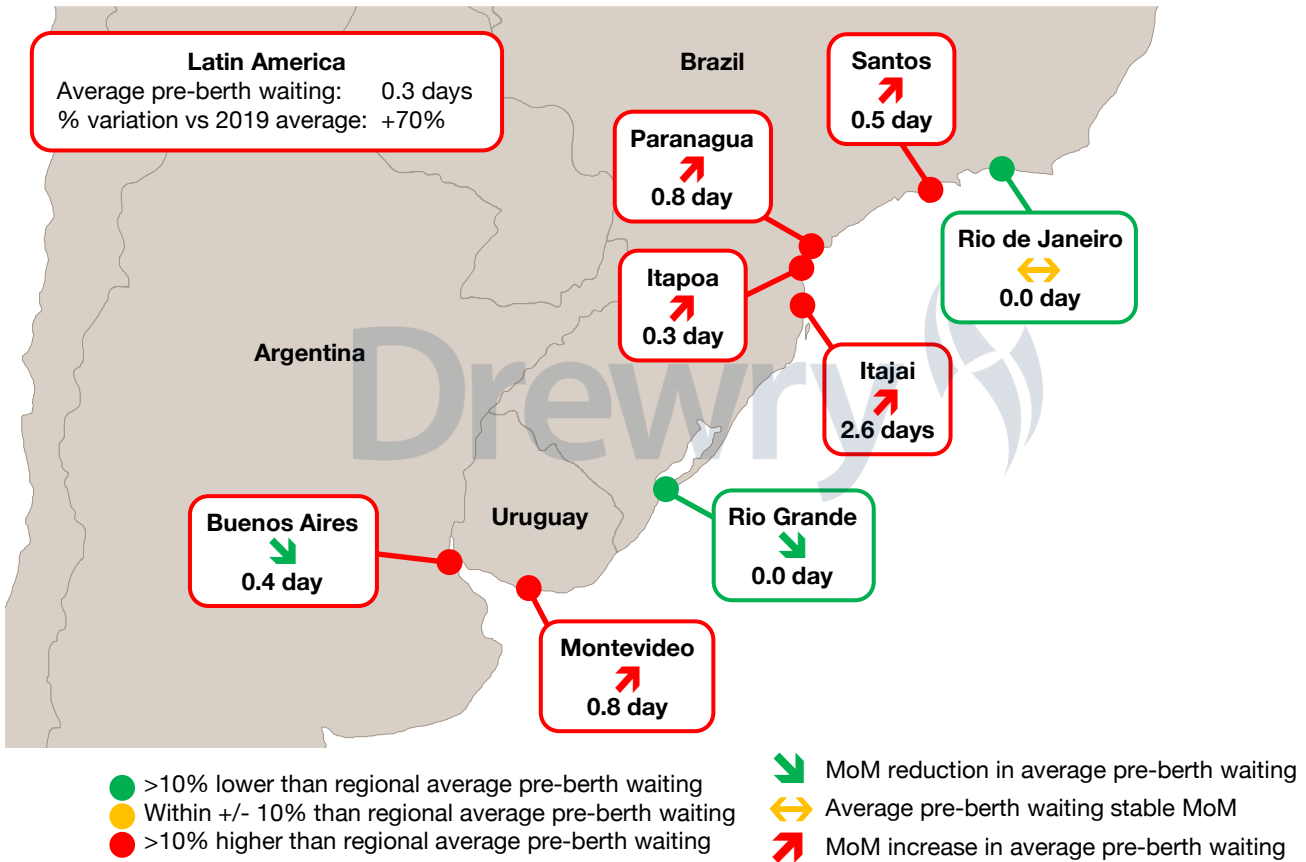- Latin America average call duration (12.5-18k teu)

Notes:
(1) 'Other' includes navigation within the port and to/from anchorage zone and intermediate waiting incurred after initial terminal call.
(2) Regional average figures include larger number of ports than those detailed in the charts.

Source: Drewry Maritime Research

Drewry

Latin America ports monitor

East Coast South America, pre-berth waiting time, October 2023

Latin America
Average pre-berth waiting: 0.3 days
% variation vs 2019 average: +70%

Brazil

Santos
↗
0.5 day

Paranagua
↗
0.8 day

Rio de Janeiro
↔
0.0 day

Itapoa
↗
0.3 day

Itajai
↗
2.6 days

Argentina

Buenos Aires
↘
0.4 day

Uruguay

Rio Grande
↘
0.0 day

Montevideo
↗
0.8 day

● >10% lower than regional average pre-berth waiting
● Within +/- 10% than regional average pre-berth waiting
● >10% higher than regional average pre-berth waiting

↘ MoM reduction in average pre-berth waiting
↔ Average pre-berth waiting stable MoM
↗ MoM increase in average pre-berth waiting

Source: Drewry Maritime Research

East Coast South America, mainline vessel performance for selected ports, October 2023

■ Average other duration
■ Average terminal duration
■ Average pre-berth waiting
— Latin America average call duration (5.3-10k teu)
— Latin America average call duration (10-12.5k teu)

Notes:
(1) 'Other' includes navigation within the port and to/from anchorage zone and intermediate waiting incurred after initial terminal call.
(2) Regional average figures include larger number of ports than those detailed in the charts.
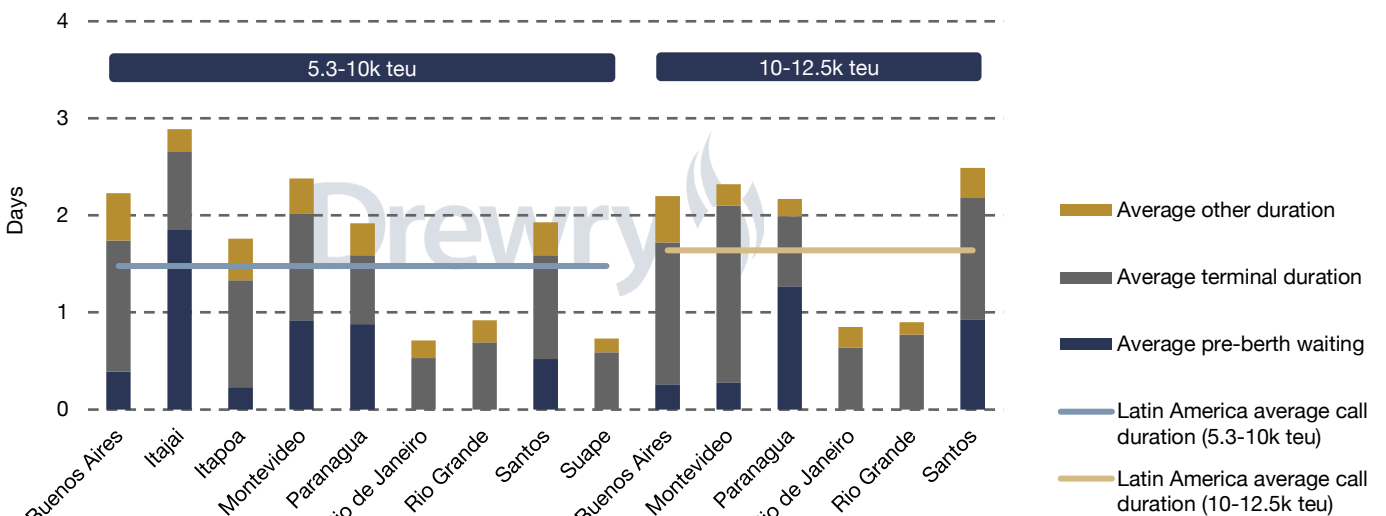
Source: Drewry Maritime Research

Drewry

Latin America ports monitor

West Coast South America, pre-berth waiting time, October 2023

Buenaventura
0.0 day

Colombia

Ecuador

Posorja
↔ 0.0 day

Guayaquil
↘ 0.1 day

Paita
0.2 day

Peru

Callao
↗ 0.2 day

Chile

Valparaiso
↗ 0.1 day

San Antonio
↘ 0.1 day

Coronel
↔ 0.0 day

Latin America
Average pre-berth waiting: 0.3 days
% variation vs 2019 average: +70%

● >10% lower than regional average pre-berth waiting
● Within +/- 10% than regional average pre-berth waiting
● >10% higher than regional average pre-berth waiting

↘ MoM reduction in average pre-berth waiting
↔ Average pre-berth waiting stable MoM
↗ MoM increase in average pre-berth waiting

Source: Drewry Maritime Research

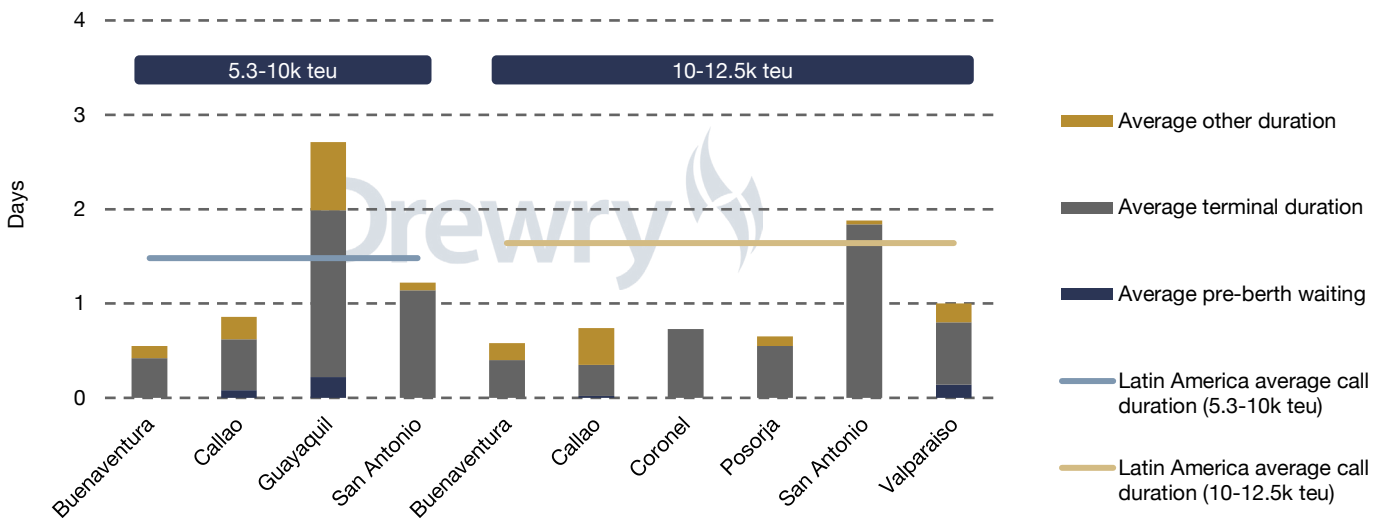**West Coast South America, mainline vessel performance for selected ports, October 2023**

5.3-10k teu

10-12.5k teu

Days

Average other duration

Average terminal duration

Average pre-berth waiting

Latin America average call duration (5.3-10k teu)

Latin America average call duration (10-12.5k teu)

Notes:
(1) 'Other' includes navigation within the port and to/from anchorage zone and intermediate waiting incurred after initial terminal call.
(2) Regional average figures include larger number of ports than those detailed in the charts.

Source: Drewry Maritime Research

Drewry

Oceania ports monitor

Throughput	Port calls	Waiting	Terminal Time
-8.1% YoY	-5.7% YoY	8.4% MoM	7.7% MoM
		Negative	Negative

Performance worsened at Oceania ports in October with 8.4% MoM increase in pre-berth waiting time

The worst is yet to come with ongoing industrial action across DP World's Australian terminals and the effect of a stoppage due to a cyber-attack not reflected in October's data.

Throughput and port calls

The Oceania Container Port Throughput Index regained much of the ground lost in August 2023, up 3.2% MoM to 112.4 points, down 8.1% YoY in September.

The rolling 12-month average growth rate fell yet again, from -1.3% in August 2023 to -3.5% in September 2023 and is now well below the global average of -0.8%.

All sample ports in Oceania experienced YoY throughput declines in September, ranging from -0.9% at Fremantle, to -21.9% at Lyttelton. The Oceania Container Port Call Index dropped 2.8% MoM to 92.4 points in October 2023.

Drewry's Nowcast Model indicates that the

Port Throughput Index recovered further in October 2023, up 2.0% MoM to 114.7 points. The rolling 12-month average growth rate could have continued to plunge, down to -5.1%. However, volatility in this regional index is more than others in this report as it is the smallest of the world regions analysed by Drewry.

Performance

The Oceania Container Port Performance Index worsened significantly in October 2023, up 9.6% to 169.7 points, though still lower than in October 2022 by 2.9%.

The average port call duration across Oceania increased to 1.9 days in October

2023, with an increase of 8.4% MoM in average pre-berth waiting time and 7.7% MoM in average terminal duration. Pre-berth waiting delays decreased in Auckland, down 46% to 0.4 day, and Tauranga, down 58% to 0.2 day.

Australian ports showed a mixed picture, with Melbourne and Adelaide reducing waiting time by nearly 50% whereas in Brisbane waiting time increased by 131% to 0.4 day. While it appears that the ongoing labour disputes at DP World's Australian terminals are not yet having a material effect on terminal delays, we expect the impact to become more apparent in the November data.
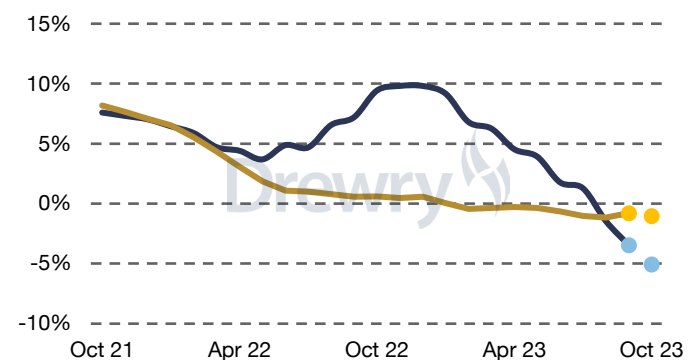
Oceania container port throughput and calls

Drewry Oceania Container Port Throughput Index
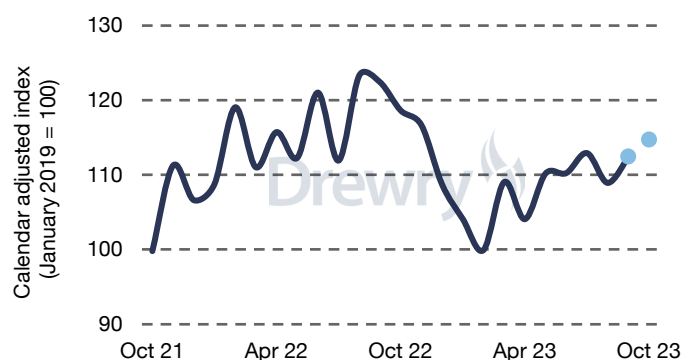
Comparisons	MoM	YoY
Sep 2023	3.2%	-8.1%
Oct 2023 - nowcast	2.0%	-3.3%

Oceania rolling 12-month average growth rate

── Oceania   ── Global

LTM growth rate	Oceania	Global
Sep 2022	7.2%	0.6%
Sep 2023	-3.5%	-0.8%
Oct 2022	9.4%	0.6%
Oct 2023 - nowcast	-5.1%	-1.1%

Note: The index figures for Africa are based on a relatively small sample and therefore should be viewed with caution.
Performance for the most recent month is predicted using Drewry's Nowcast model which utilises AIS-based derived data on the capacity and duration of vessel calls to predict port activity levels.
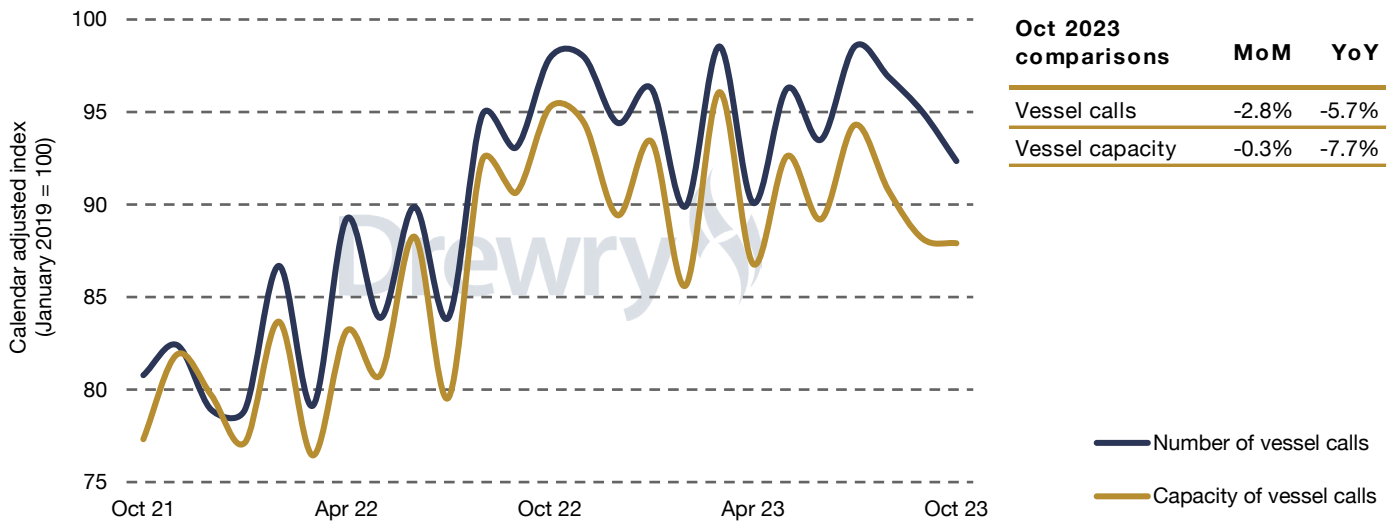*Source: Drewry Maritime Research*

Drewry

Oceania ports monitor

Oceania - growth / decline in port throughput
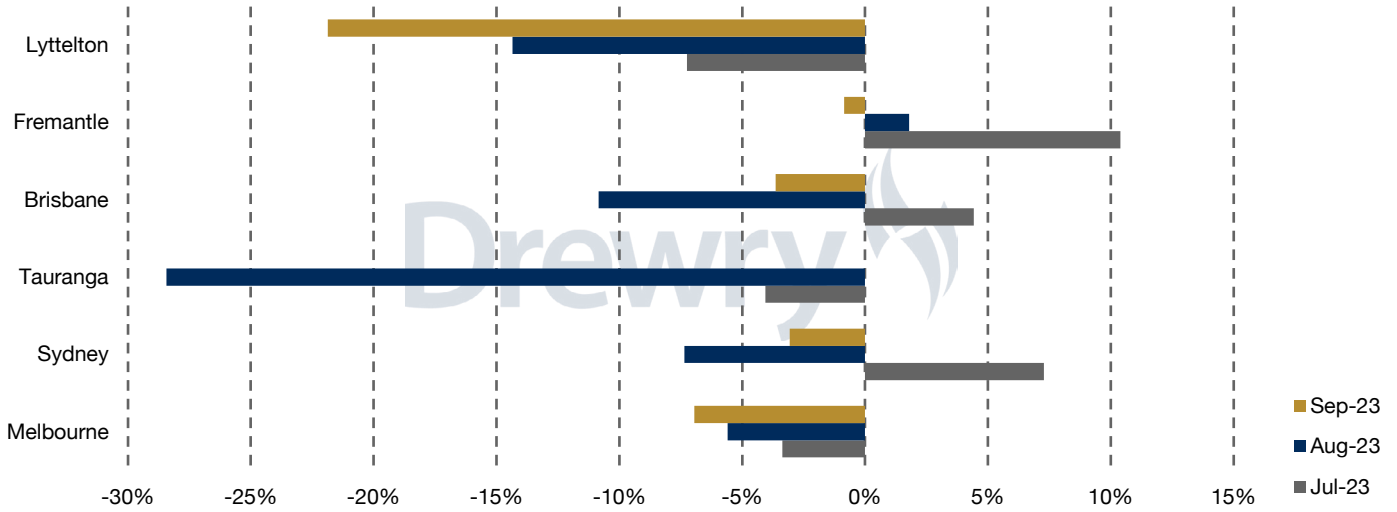
Legend:
- Sep-23
- Aug-23
- Jul-23

Source: Drewry Maritime Research

Drewry Oceania Container Port Call Index

Y-axis: Calendar adjusted index (January 2019 = 100)

X-axis: Oct 21, Apr 22, Oct 22, Apr 23, Oct 23

Oct 2023 comparisons	MoM	YoY
Vessel calls	-2.8%	-5.7%
Vessel capacity	-0.3%	-7.7%

Legend:
- Number of vessel calls
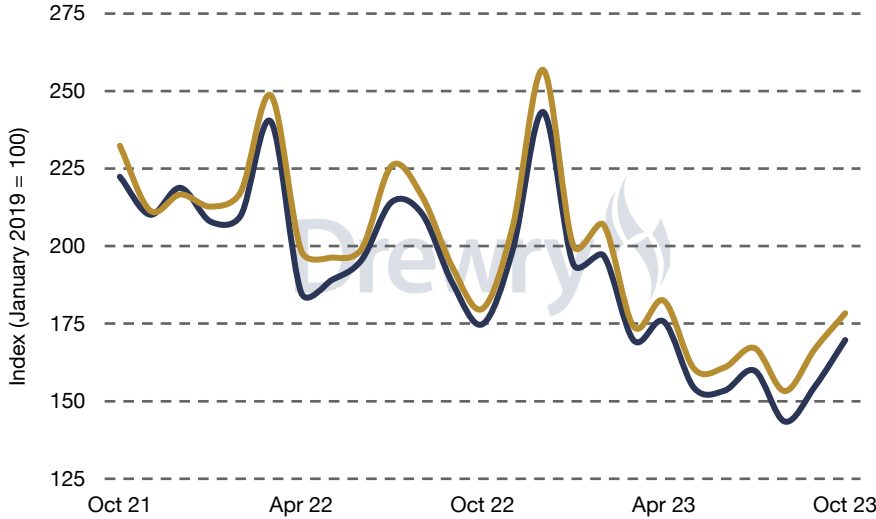- Capacity of vessel calls

Source: Drewry Maritime Research

Drewry

Oceania ports monitor

Drewry Oceania container port performance

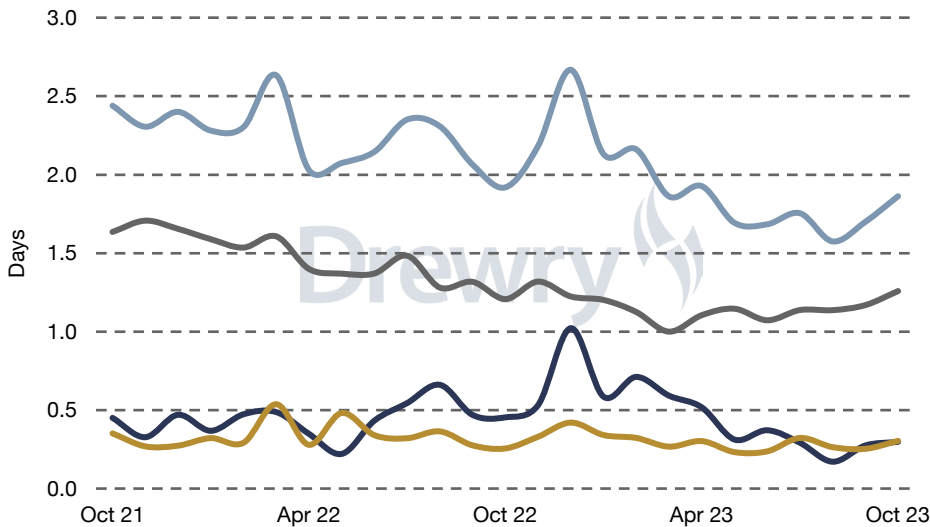**Drewry Oceania Container Port Performance Index**

Oct 2023 comparisons	MoM	YoY
Call duration	9.6%	-2.9%
Call duration per 1,000 teu	6.9%	-0.8%

— Average total duration per vessel call

— Average total duration per 1,000 teu vessel capacity

Source: Drewry Maritime Research

Oceania average container port call duration

Oct 2023 comparisons	MoM	YoY
Pre-berth waiting	8.4%	-34.3%
Terminal	7.7%	4.3%
Other	19.9%	18.8%
Total	9.6%	-2.9%

— Average pre-berth waiting
— Average terminal duration
— Average other duration
— Average total port call duration
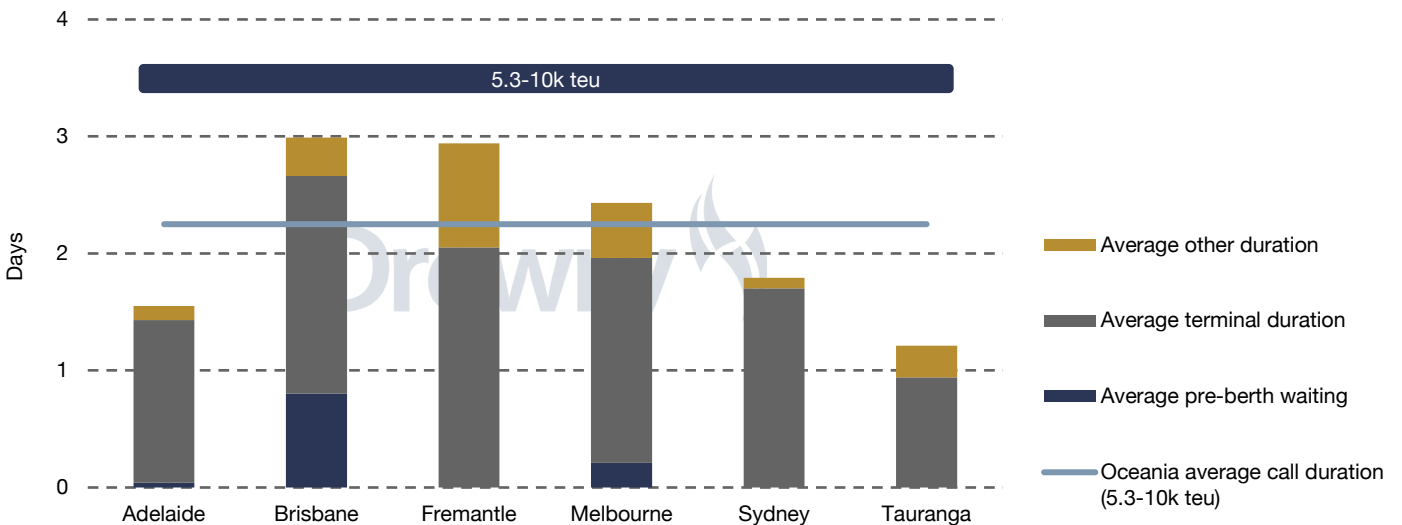
Source: Drewry Maritime Research

Drewry

Oceania ports monitor

Oceania, pre-berth waiting time, October 2023

Oceania
Average pre-berth waiting: 0.3 days
% variation vs 2019 average: +474%

Australia

Fremantle
↔
0.0 day

Adelaide
↔
0.1 day

Melbourne
↔
0.2 day

Sydney
↔
0.1 day

Brisbane
↔
0.4 day

Tauranga
↔
0.2 day

Auckland
↓
0.4 day

Lyttelton
↔
1.5 days

New Zealand

🟢 >10% lower than regional average pre-berth waiting
🟡 Within +/- 10% than regional average pre-berth waiting
🔴 >10% higher than regional average pre-berth waiting

↘ MoM reduction in average pre-berth waiting
↔ Average pre-berth waiting stable MoM
↗ MoM increase in average pre-berth waiting

Source: Drewry Maritime Research

Oceania, mainline vessel performance for selected ports, October 2023

5.3-10k teu

Days

■ Average other duration
■ Average terminal duration
■ Average pre-berth waiting
— Oceania average call duration (5.3-10k teu)

Adelaide   Brisbane   Fremantle   Melbourne   Sydney   Tauranga

Notes:
(1) 'Other' includes navigation within the port and to/from anchorage zone and intermediate waiting incurred after initial terminal call.
(2) Regional average figures include larger number of ports than those detailed in the charts.

Source: Drewry Maritime Research

Drewry

Africa ports monitor

	Throughput		Port calls		Waiting		Terminal Time
	-8.0% YoY		5.6% YoY		9.4% MoM		-3.7% MoM
					Negative		Positive

Collapse in South African volumes in October 2023, with throughput at three main ports down over 20% YoY

Congestion worsened at many African ports in October 2023, with pre-berth waiting time 59% higher than in October 2022.

Throughput and port calls

The African Container Port Throughput Index softened slightly to 109.9 in September 2023, decreasing just 0.3% MoM, and down 8.0% YoY. The rolling 12-month average growth rate fell further into negative territory from -0.3% in August 2023 to -1.3% in September 2023.

September saw a collapse in throughput at the main South African ports, with Durban and Cape Town down around 20% YoY while Coega volumes have nearly halved, down 41.9% YoY.

The Africa Container Port Call Index dropped 2.1% MoM in October 2023 to 113.8 points, but remained flat YoY.

Drewry's Nowcasting Model indicates that the Port Throughput Index will

have fallen another 5.7% MoM in October 2023. This is a 16.7% gain YoY due to exceptionally weak volumes in October 2022, meaning the rolling 12-month average growth rate is expected to have moved back into positive territory, to 0.8%.

Performance

The total port call duration rose slightly, increasing 0.3% MoM in October 2023 to 2.7 days, and remaining 25.7% higher than last year. A small decrease in average terminal duration (-0.05 day) was offset by a similar increase in pre-berth waiting time (0.06 day) compared to the prior month.

In South Africa, weather-related delays in October, which have persisted into

November, caused average pre-berth waiting time to increase by 91% at Cape Town, to 3.0 days, and by 263% at Durban, to 3.4 days.

Elsewhere in the region, Morocco's Casablanca port experienced growing delays, up over 300% to 0.7 day from 0.2 day in September. Conversely, the Algerian ports of Algiers (down 36% to 1.4 days) and Bejaia (down 69% to 0.9 day) have improved significantly.
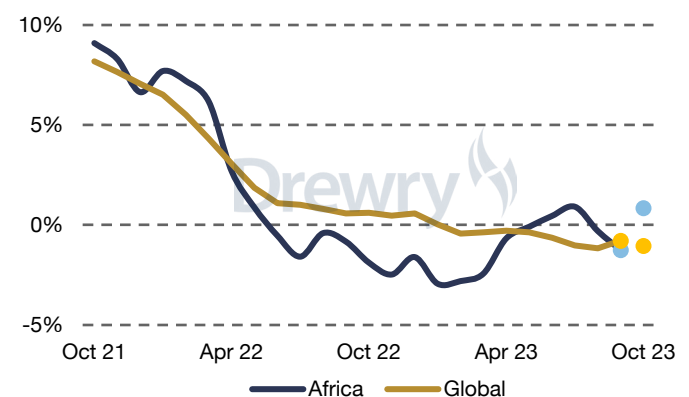
Over in the east, Dar es Salaam continues to underperform, with average waiting time increasing to 6.9 days, up 64% on September and Djibouti continued to experience its worst performance in four years, with waiting time up a further 36% to 1.2 days.

Africa container port throughput and calls

Drewry Africa Container Port Throughput Index
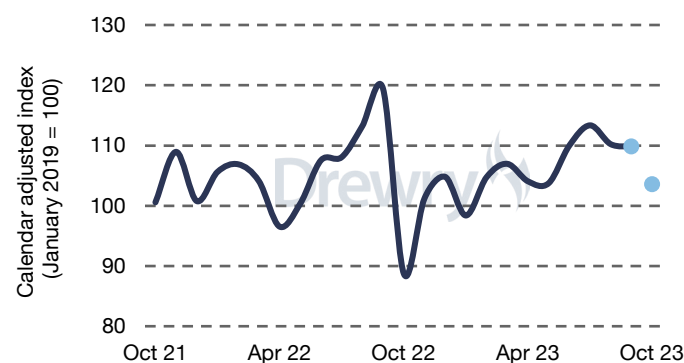
Comparisons	MoM	YoY
Sep 2023	-0.3%	-8.0%
Oct 2023 - nowcast	-5.7%	16.7%

Africa rolling 12-month average growth rate

LTM growth rate	Africa	Global
Sep 2022	-0.8%	0.6%
Sep 2023	-1.3%	-0.8%
Oct 2022	-1.9%	0.6%
Oct 2023 - nowcast	0.8%	-1.1%

Note: Performance for the most recent month is predicted using Drewry's Nowcast model which utilises AIS-based derived data on the capacity and duration of vessel calls to predict port activity levels.
Source: Drewry Maritime Research

Drewry

Africa ports monitor

Africa - growth / decline in port throughput
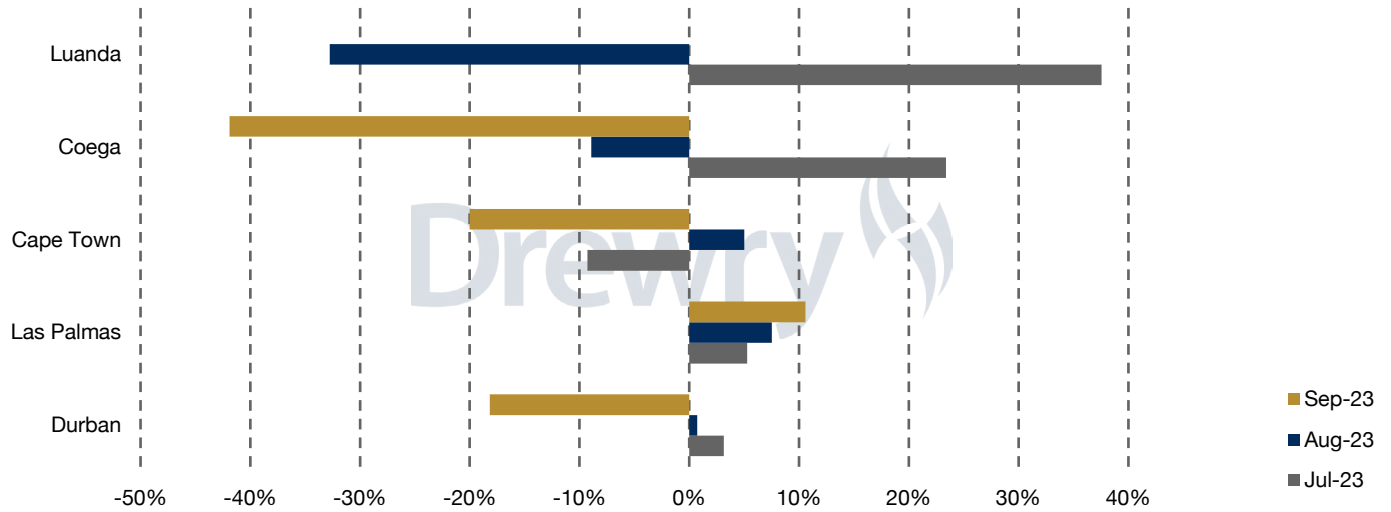
Legend:
- Sep-23
- Aug-23
- Jul-23

Source: Drewry Maritime Research

Drewry Africa Container Port Call Index

Y-axis: Calendar adjusted index (January 2019 = 100), from 90 to 140
X-axis: Oct 21, Apr 22, Oct 22, Apr 23, Oct 23

Legend:
- Number of vessel calls
- Capacity of vessel calls
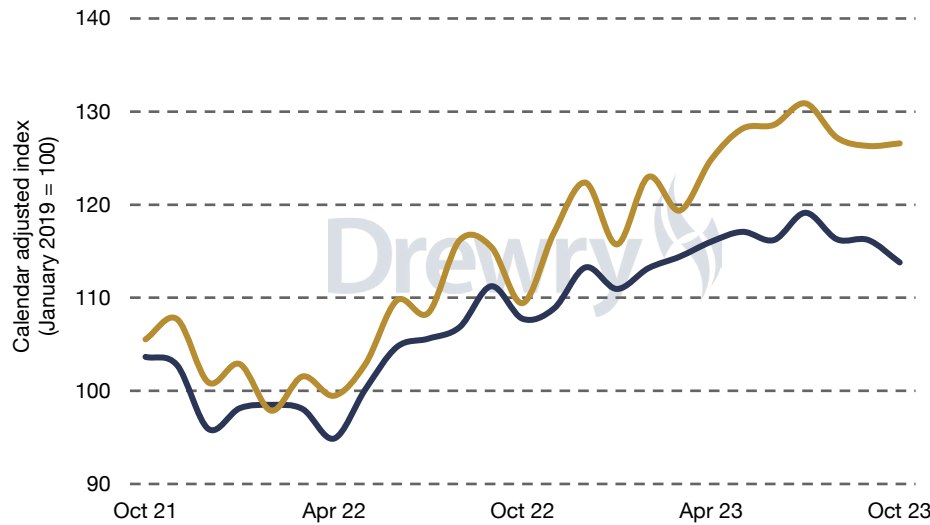
Oct 2023 comparisons	MoM	YoY
Vessel calls	-2.1%	5.6%
Vessel capacity	0.2%	15.7%

Source: Drewry Maritime Research

Drewry

Africa ports monitor

Drewry Africa container port performance

Drewry Africa Container Port Performance Index
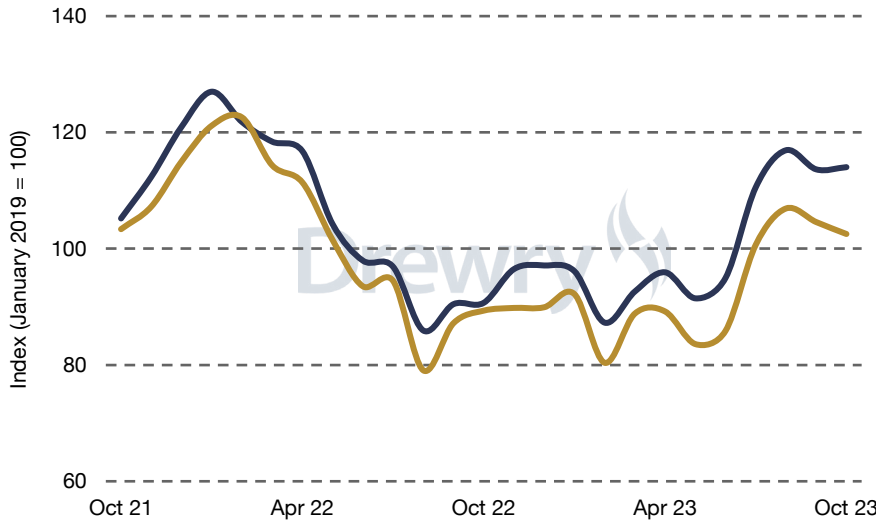
Oct 2023 comparisons	MoM	YoY
Call duration	0.3%	25.7%
Call duration per 1,000 teu	-2.0%	14.8%

— Average total duration per vessel call

— Average total duration per 1,000 teu vessel capacity

Source: Drewry Maritime Research

Africa average container port call duration
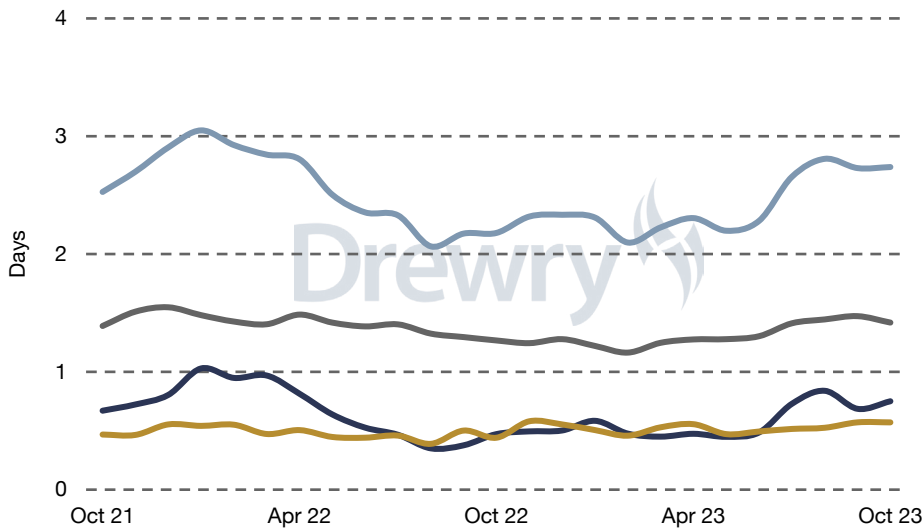
Oct 2023 comparisons	MoM	YoY
Pre-berth waiting	9.4%	59.0%
Terminal	-3.7%	12.0%
Other	-0.1%	29.4%
Total	0.3%	25.7%

— Average pre-berth waiting
— Average terminal duration
— Average other duration
— Average total port call duration

Source: Drewry Maritime Research

Drewry

Africa ports monitor

North Africa, pre-berth waiting time, October 2023

Africa
Average pre-berth waiting: 0.7 days
% variation vs 2019 average: -9%

Tanger Med
0.0 day

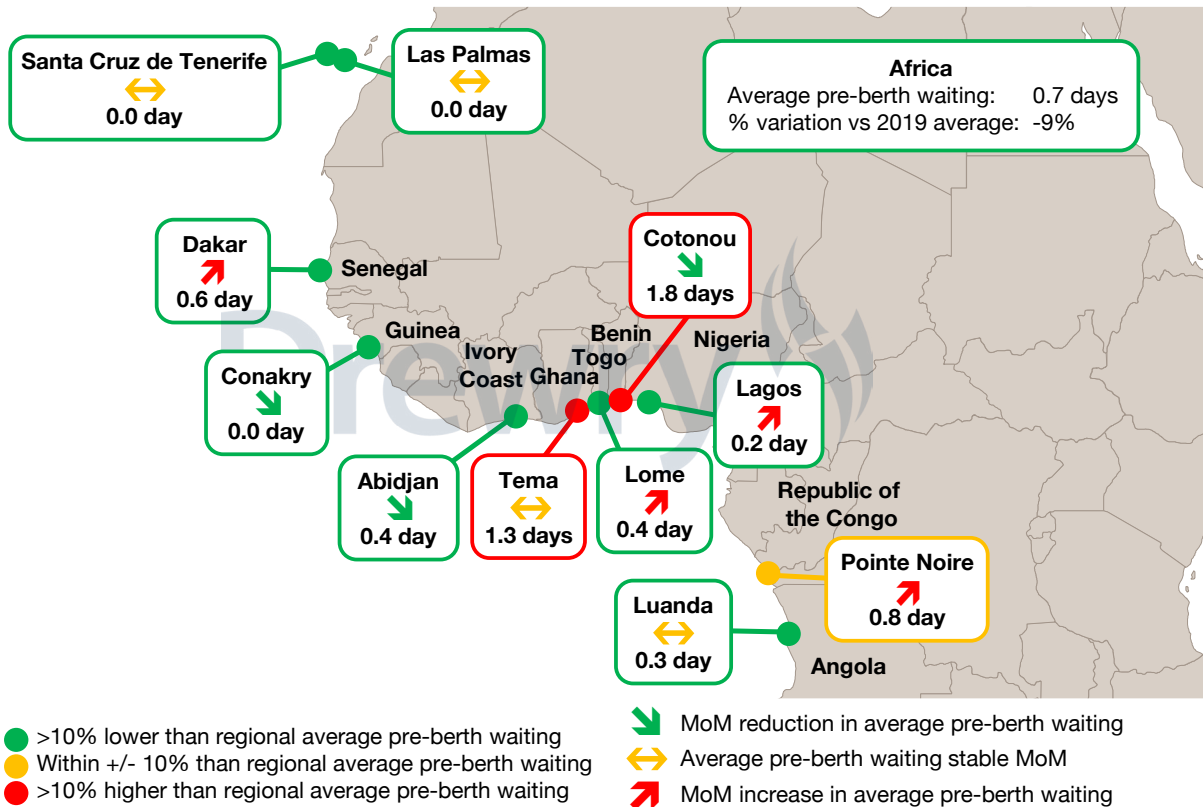**Bejaia**
0.9 day

Rades
0.2 day

Algiers
1.4 days

Tunisia

Casablanca
0.7 day

Algeria

Morocco

- 🟢 >10% lower than regional average pre-berth waiting
- 🟡 Within +/- 10% than regional average pre-berth waiting
- 🔴 >10% higher than regional average pre-berth waiting

- ↘ MoM reduction in average pre-berth waiting
- ↔ Average pre-berth waiting stable MoM
- ↗ MoM increase in average pre-berth waiting

Source: Drewry Maritime Research

West Africa, pre-berth waiting time, October 2023

Santa Cruz de Tenerife
↔
0.0 day

Las Palmas
↔
0.0 day

Africa
Average pre-berth waiting: 0.7 days
% variation vs 2019 average: -9%

Dakar
0.6 day

Senegal

Cotonou
1.8 days

Guinea

Benin
Togo

Nigeria

Conakry
0.0 day

Ivory Coast

Ghana

Lagos
0.2 day

Abidjan
0.4 day

Tema
1.3 days

Lome
0.4 day

Republic of the Congo

Pointe Noire
0.8 day

Luanda
0.3 day

Angola

- 🟢 >10% lower than regional average pre-berth waiting
- 🟡 Within +/- 10% than regional average pre-berth waiting
- 🔴 >10% higher than regional average pre-berth waiting

- ↘ MoM reduction in average pre-berth waiting
- ↔ Average pre-berth waiting stable MoM
- ↗ MoM increase in average pre-berth waiting

Source: Drewry Maritime Research

Drewry

Africa ports monitor

Africa (a), mainline vessel performance for selected ports, October 2023
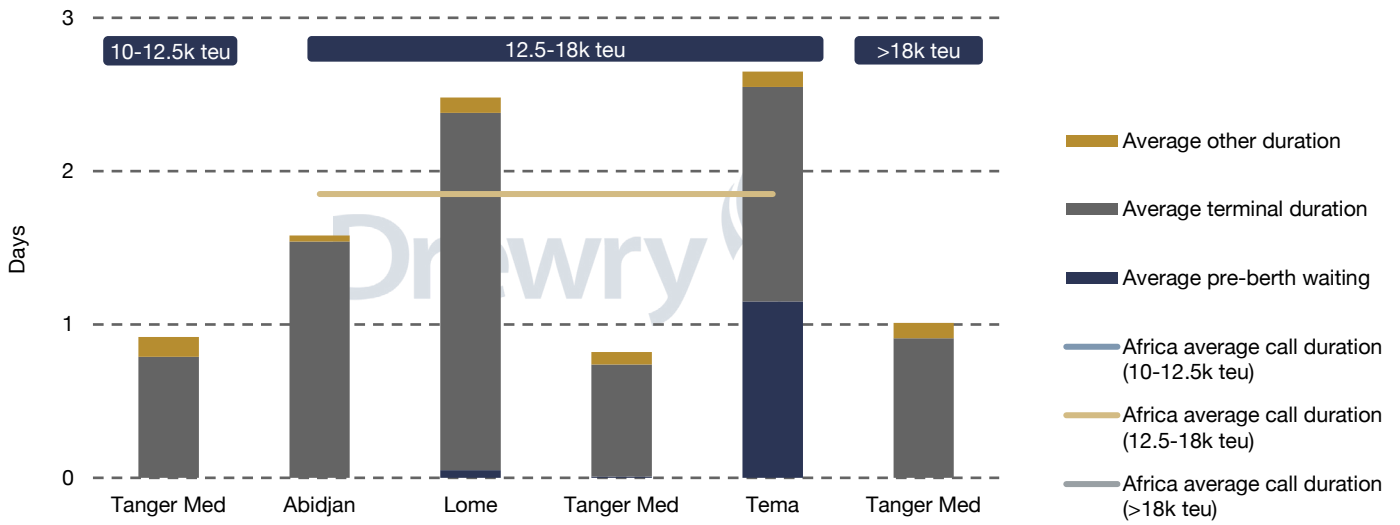
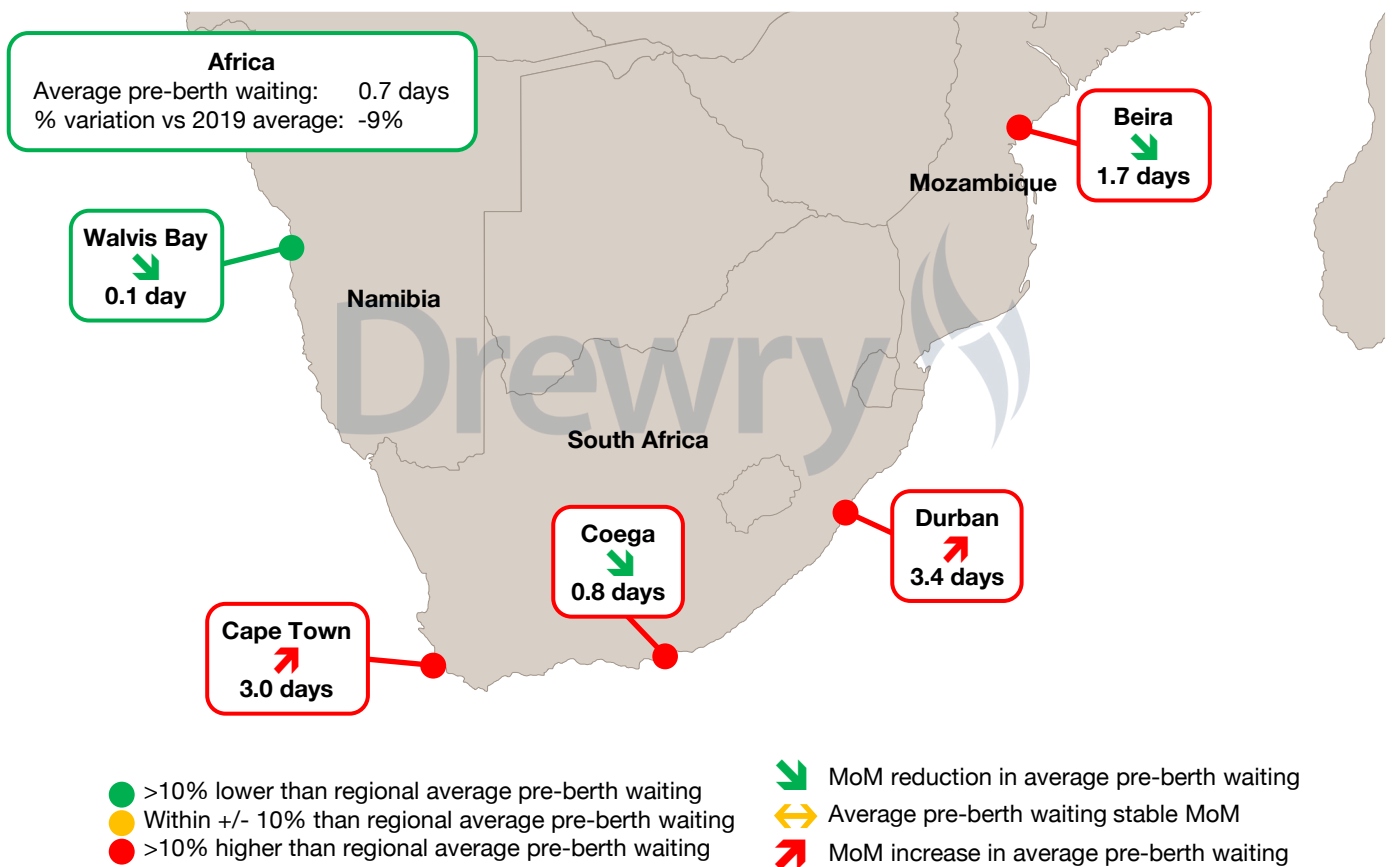Notes:
(1) 'Other' includes navigation within the port and to/from anchorage zone and intermediate waiting incurred after initial terminal call.
(2) Regional average figures include larger number of ports than those detailed in the charts.
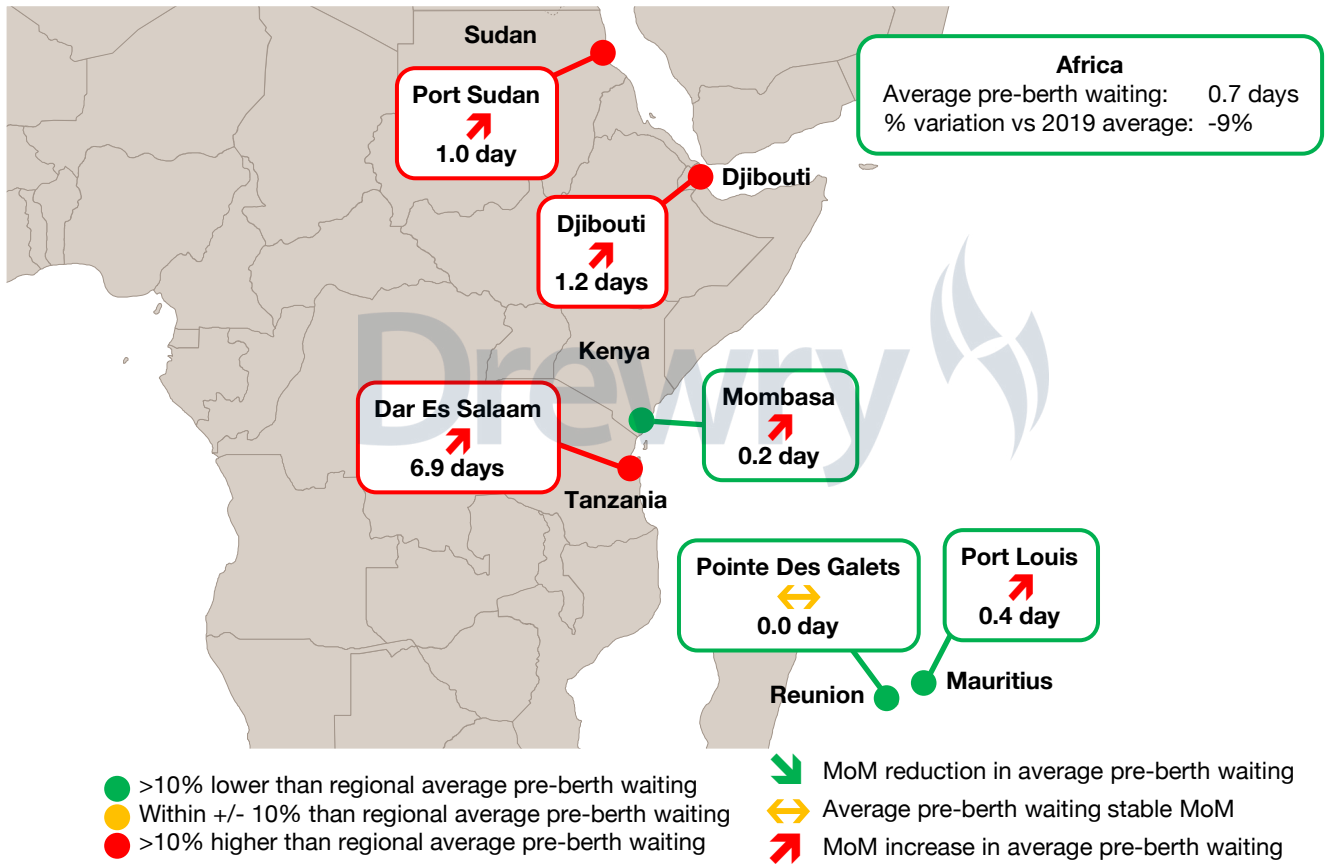
Source: Drewry Maritime Research

Southern Africa, pre-berth waiting time, October 2023

Africa
Average pre-berth waiting: 0.7 days
% variation vs 2019 average: -9%

Beira
1.7 days

Walvis Bay
0.1 day

Coega
0.8 days

Durban
3.4 days

Cape Town
3.0 days

● >10% lower than regional average pre-berth waiting
● Within +/- 10% than regional average pre-berth waiting
● >10% higher than regional average pre-berth waiting

↘ MoM reduction in average pre-berth waiting
↔ Average pre-berth waiting stable MoM
↗ MoM increase in average pre-berth waiting

Source: Drewry Maritime Research

Drewry

Africa ports monitor

East Africa, pre-berth waiting time, October 2023

Sudan

Port Sudan
↗
1.0 day

Djibouti

Djibouti
↗
1.2 days

Africa
Average pre-berth waiting: 0.7 days
% variation vs 2019 average: -9%

Kenya

Dar Es Salaam
↗
6.9 days

Mombasa
↗
0.2 day

Tanzania

Pointe Des Galets
↔
0.0 day

Port Louis
↗
0.4 day

Reunion

Mauritius

🟢 >10% lower than regional average pre-berth waiting
🟡 Within +/- 10% than regional average pre-berth waiting
🔴 >10% higher than regional average pre-berth waiting

↘ MoM reduction in average pre-berth waiting
↔ Average pre-berth waiting stable MoM
↗ MoM increase in average pre-berth waiting

Source: Drewry Maritime Research

Africa (b), mainline vessel performance for selected ports, October 2023
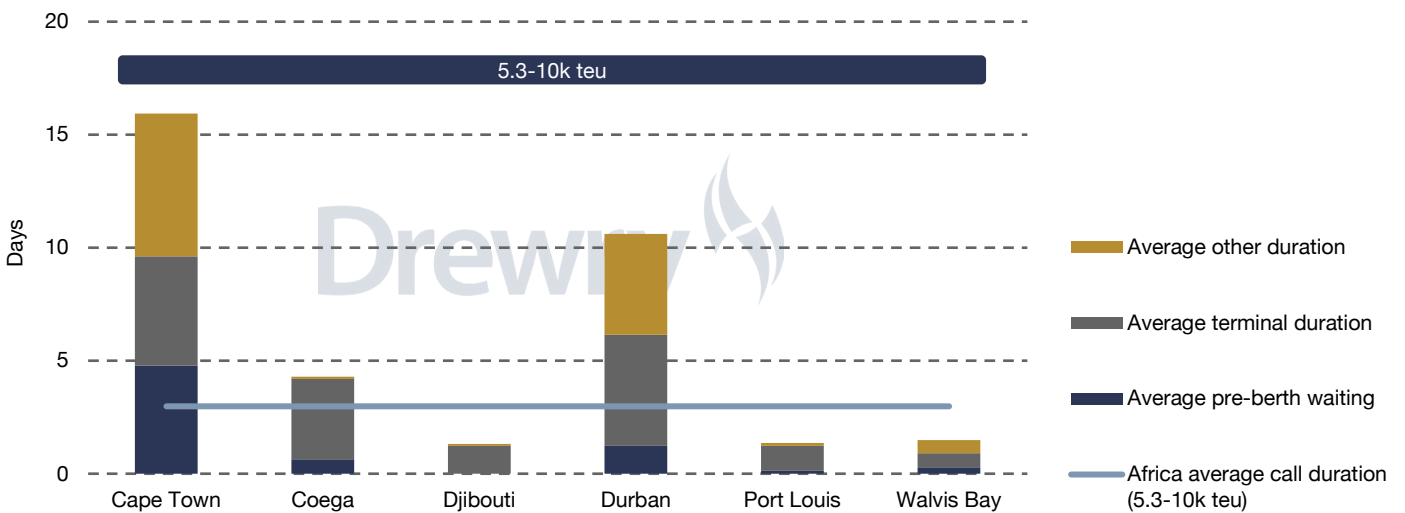
5.3-10k teu

Legend:
- Average other duration
- Average terminal duration
- Average pre-berth waiting
- Africa average call duration (5.3-10k teu)

Y-axis: Days (0, 5, 10, 15, 20)
X-axis: Cape Town, Coega, Djibouti, Durban, Port Louis, Walvis Bay

Notes:
(1) 'Other' includes navigation within the port and to/from anchorage zone and intermediate waiting incurred after initial terminal call.
(2) Regional average figures include larger number of ports than those detailed in the charts.

Source: Drewry Maritime Research

Methodology

Drewry Port Throughput Indices

The Drewry Container Port Throughput Indices are a series of volume growth/decline indices based on monthly throughput data for a sample of over 340 ports worldwide, representing over 80% of global volumes.

- The base point for the indices is January 2019 = 100.
- The index is presented on a calendar adjusted basis.

Notes

1. Figures presented for the current month are preliminary and will be updated in subsequent months.

2. Port throughput data coverage for some regions is low and so figures for these regions should be treated with caution.

3. Composition of the index changes according to which ports have issued their monthly data by the date of report issuance.

4. Some throughput data is estimated from published quarterly throughput figures.

Nowcasting Model

Drewry has developed a nowcasting model that uses vessel capacity and terminal duration data (derived from our proprietary AIS model) to make short-term predictions of port throughput.

Drewry Container Port Call Indices

The Drewry Container Port Call Indices are a series of volume growth/decline indices based on monthly port calls recorded across a sample of over 190 ports worldwide which together handle over 85% of global container volumes.

- The base point for the indices is January 2019 = 100.
- The index is presented on a calendar adjusted basis.

The data source for the Index is Drewry's own AIS model which captures all container vessel activity at the target ports for all containership sizes.

Drewry Container Port Performance Index

The Drewry Container Port Performance Indices are a series of indices that measure the average duration of container ship calls each month for a sample of over 190 ports worldwide which together handle over 85% of global container volumes.

- The base point for the indices is January 2019 = 100.

The data source for the Index is Drewry's own AIS model which captures all container vessel activity at the target ports for all containership sizes. Container vessel call are tracked individually, with total call duration broken down into the following categories:

- **Pre-berth waiting:** time spent in a designated anchorage zone outside of the port prior to making the first terminal berth call;

- **Terminal:** time spent moored at a dedicated container terminal berth. If a vessel calls at more than one terminal (for example a feeder vessel) then this is the combined time of all terminal berth calls;

- **Other:** includes time spent navigating within the port, time at other port berths (i.e. outside of the dedicated container terminals) and any intermediate waiting (i.e. incurred after the initial terminal call).

Regional port congestion assessment

Regional port congestion is measured on basis of average pre-berth waiting for a sample of over 190 ports worldwide which together handle over 85% of global container volumes. For each region, average pre-berth waiting in the current month is compared to the 2019 average pre-berth waiting time, with each region assigned a Red-Amber-Green ranking according to the degree of variation from the 2019 average.

Methodology

Port congestion assessment

Port level congestion is measured on basis of average pre-berth waiting for a sample of over 190 ports worldwide which together handle over 85% of global container volumes. For each port, average pre-berth waiting in the current month is compared to the regional average pre-berth waiting time in the current month, with each port assigned a Red-Amber-Green ranking according to the degree of variation from the regional average.

Drewry's AIS Model

Commercial vessels utilise the global Automatic Identification System (AIS) system to transmit vessel position, together with other data including vessel identity, course and speed information. Vessel AIS transmissions are monitored by both satellite and terrestrial AIS receivers. While the primary purpose of the AIS system is safety, the system generates large amounts of data that enable activity tracking of the global ship fleet.

Drewry's proprietary AIS model utilises data from a specialist provider based on 4-hourly AIS transmissions from the global ship fleet. Drewry tracks port activity levels using a Geographic Information System (GIS) interface which links vessel positions to Drewry's in-house database of port and terminal locations.

It is noted that AIS coverage may be limited in some geographies due to poor satellite coverage.

Note: In November 2021 the introduction of new data laws in China temporarily reduced the volume of AIS transmissions from terrestrial transponders located in China. As a result, data for November 2021 is partial, and Drewry has estimated the relevant index values based on October and December 2021 performance.

Regional Definitions

Drewry's utilises a common set of regional definitions for its ports and container sector publications.

Table A.1 summarises the regional definitions by country.

Table A.2 summarises the ports for each region that comprise the regional samples upon which the Drewry Port Call Indices and Drewry Port Performance Indices are based.

Methodology

Table A.1 Regional definitions by country

Region	Sub-Region	Countries
Greater China	Greater China	China, Hong Kong
Asia (ex. China)	North Asia	Japan, Taiwan, South Korea, Russia (Pacific Coast)
	Southeast Asia	Brunei, Cambodia, Indonesia, Malaysia, Singapore, Myanmar, Philippines, Thailand, Vietnam
North America	East Coast North America	USA, Canada, Bermuda
	Gulf Coast North America	USA, Mexico
	West Coast North America	USA, Canada, Mexico
Europe	North West Europe	Belgium, Eire, France (North and West Coasts), Germany, Madeira, Netherlands, Spain (Atlantic Coast), Portugal, Azores, United Kingdom
	Scandinavia and Baltic	Greenland, Iceland, Denmark, Finland, Norway, Sweden, Estonia, Latvia, Lithuania, Poland
		Russia (Baltic Coast)
	West Mediterranean	France (Med Coast), Spain (Med Coast), Malta, Italy, Gibraltar
	East Mediterranean & Black Sea	Albania, Croatia, Bulgaria, Georgia, Romania, Russia (Black Sea), Slovenia, Ukraine, Montenegro, Israel, Syria, Lebanon, Egypt, Cyprus, Turkey, Greece
Middle East & South Asia	Middle East	Yemen, Jordan, Oman, UAE , Bahrain, Qatar, Kuwait, Saudi Arabia, Iraq, Iran
	South Asia	Pakistan, India, Bangladesh, Sri Lanka
Latin America	Central America/Caribbean	Colombia (NE Coast), Belize, Costa Rica, El Salvador, Guatemala, Honduras, Nicaragua, Venezuela, Guyana, Surinam, French Guiana, Panama, Bahamas, Barbados, Cayman Islands, Cuba, Dominican Republic, Haiti, Jamaica, Leeward Islands, Netherlands Antilles, Puerto Rico, Trinidad and Tobago, Virgin Islands, Windward Islands
	East Coast South America	Brazil, Paraguay, Uruguay, Argentina
	West Coast South America	Ecuador, Chile, Peru, Colombia (Pacific Coast)
Oceania	Oceania	Australia, New Zealand, Guam, Papua New Guinea, Fiji, New Caledonia, Samoa, Tahiti, Tuvalu,Vanuatu
Africa	East Africa	Kenya, Reunion, Mauritius, Madagascar, Seychelles, Sudan, Tanzania, Eritrea, Djibouti, Somalia
	West Africa	Canary Islands, Mauritania, Senegal, Gabon, Gambia, Guinea, Sierra Leone, Liberia, Ivory Coast, Togo, Ghana, Benin, Nigeria, Cameroun, Equatorial Guinea, Congo, DR Congo, Ascension Island, Angola
	North Africa	Libya, Tunisia, Morocco, Algeria
	Southern Africa	Namibia, South Africa, Mozambique

Source: Drewry Maritime Research

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Methodology

Table A.2 Ports included in the Drewry Container Port Call Indices and Drewry Container Port Performance Indices

Regional Index	Sub-Region	Number of ports in sample	% share of regional throughput (2021)	Ports
Greater China	Greater China	13	83%	Dalian, Guangzhou, Hong Kong, Lianyungang, Ningbo, Qingdao, *Qinzhou*, Rizhao, Shanghai, Shenzhen, Tianjin, Xiamen, Yingkou
	Total Greater China	**13**	**83%**	
Asia (ex. China)	North Asia	13	86%	Busan, Gwangyang, Incheon, Kaohsiung, Kobe, Nagoya, Osaka, *Taichung, Taipei,* Tokyo, Vladivostok, Vostochny, Yokohama
	South East Asia	12	88%	Bangkok, Haiphong, Ho Chi Minh City, Laem Chabang, Manila, Port Klang, Sihanoukville, Singapore, Surabaya, Tanjung Pelepas, Tanjung Priok, Yangon
	Total Asia (ex. China)	**25**	**87%**	
North America	East Coast North America	10	92%	Baltimore, Charleston, Hampton Roads, *Jacksonville,* Miami, Montreal, New York, Philadelphia, Port Everglades, Savannah
	Gulf Coast North America	4	82%	Altamira, Houston, *Mobile,* Vera Cruz
	West Coast North America	9	92%	Lazaro Cardenas, Long Beach, Los Angeles, Manzanillo (Mexico), Oakland, Prince Rupert, Seattle, Tacoma, Vancouver
	Total North America	**23**	**91%**	
Europe	East Mediterranean & Black Sea	19	78%	Alexandria, Ambarli, Ashdod, Asyaport, Beirut, Damietta, *Evyap*, *Gemlik,* Haifa, Koper, Mersin, Nemrut Bay, Novorossiysk, Piraeus, Port Said, *Port Said East*, Poti, Yarimica, Yilport
	Northwest Europe	11	86%	Antwerp, Bremerhaven, Felixstowe, Hamburg, Le Havre, Port Of London, Rotterdam, Sines, Southampton, *Wilhelmshaven, Zeebrugge*
	Scandinavia & Baltic	10	74%	Aarhus, Gdansk, Gdynia, Gothenburg, Helsinki, *Kaliningrad,* Klaipeda, Kotka, *Riga,* Saint Petersburg
	West Mediterranean	8	84%	Algeciras, Barcelona, Genoa, Gioia Tauro, La Spezia, Marsaxlokk, Marseilles-Fos, Valencia
	Total Europe	**48**	**82%**	
Middle East & South Asia	Middle East	10	89%	Aqaba, Bandar Abbas, Dammam, Hamad, Jebel Ali, Jeddah, Khalifa Port, King Abdullah, Salalah, Umm Qasr
	South Asia	9	87%	Chennai, Chittagong, *Cochin,* Colombo, Jawaharlal Nehru, Karachi, Mundra, *Pipavav,* Port Qasim
	Total Middle East & South Asia	**19**	**88%**	
Latin America	Central America/ Caribbean	15	83%	Balboa, Cartagena (Colombia), Caucedo, Colon (Cristobal), Colon (Evergreen), Colon (Manzanillo), Freeport, Kingston, Puerto Barrios, Puerto Cortes, Puerto Limon, Puerto Quetzal, Rodman, San Juan, Santo Tomas De Castilla
	East Coast South America	9	82%	Buenos Aires, Itajai, Itapoa, Montevideo, Paranagua, *Rio de Janeiro,* Rio Grande, Santos, *Suape*
	West Coast South America	8	85%	Buenaventura, Callao, Coronel, Guayaquil, *Paita, Posorja,* San Antonio, Valparaiso
	Total Latin America	**32**	**83%**	
Oceania	Oceania	8	82%	*Adelaide,* Auckland, Brisbane, Fremantle, *Lyttelton,* Melbourne, Sydney, Tauranga
	Total Oceania	**8**	**82%**	
Africa	East Africa	6	97%	Dar Es Salaam, Djibouti, Mombasa, Pointe Des Galets, Port Louis, Port Sudan
	North Africa	5	88%	Algiers, Bejaia, Casablanca, Rades, Tanger Med
	Southern Africa	5	92%	Beira, Cape Town, Coega, Durban, Walvis Bay
	West Africa	10	80%	Abidjan, Cotonou, Dakar, Lagos, Las Palmas, Lome, Luanda, Pointe Noire, *Santa Cruz de Tenerife*, Tema
	Total Africa	**26**	**86%**	
Global		**194**	**86%**	

Note: ports in italics added into AIS-based indices in January 2023

Source: Drewry Maritime Research

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Drewry's proprietary AIS-driven analytics model now covers 170 of the world's top ports.

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