



Ports & Terminals Insight Supplement

Published: 30 June 2022

Contents

Global ports monitor	2
Greater China ports monitor.....	8
Asia (excluding China) ports monitor	12
North America ports monitor.....	17
Europe ports monitor	23
Middle East & South Asia ports monitor	30
Latin America ports monitor.....	35
Oceania ports monitor.....	40
Africa ports monitor.....	45
Methodology	51

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Global ports monitor

 Throughput -1.5% YoY Negative	 Port calls -2.3% YoY Negative	 Waiting +2.0% MoM Negative	 Terminal Time -3.7% MoM Positive
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Drewry Global Container Port Throughput Index

Growth in global port throughput lost momentum in April 2022

Despite a modest 1.7% MoM increase, the Drewry Global Port Throughput Index is down 1.5% YoY, providing further evidence that the post-Covid demand boom has run its course. Port throughput across North America continues to rise, but growth rates have moderated. Chinese port throughput was held back by lockdowns in Shanghai.

The Drewry Global Port Throughput Index increased 1.7% MoM to reach 141.1 points in April 2022, 1.5% below the 143.1 points recorded in April 2021. This is further evidence that the post-Covid demand boom appears to have run its course.

Global Container Port Throughput Index down 1.5% YoY

Figure 1.2 details the contribution to growth by region on a monthly basis. While the Greater China region made the largest contribution to MoM global container port throughput growth, it was held back by poor performance at Shanghai where volumes fell 25% MoM due to the imposition of Covid lockdowns.

Figure 1.3 summarises the YoY change in port throughput on a regional basis. North America recorded a 4.5% increase in port handling, with Oceania the only other region in positive territory. Throughput in Asia (excluding China) was 4.1% lower YoY, with ports in this region quick to feel the impact of Chinese lockdowns on trade.

North American market posts 4.5% YoY increase in April 2022

Figure 1.1 Drewry Global Container Port Throughput Index



April 2022 comparisons	MoM	YoY
Port throughput	1.7%	-1.5%

Source: Drewry Maritime Research

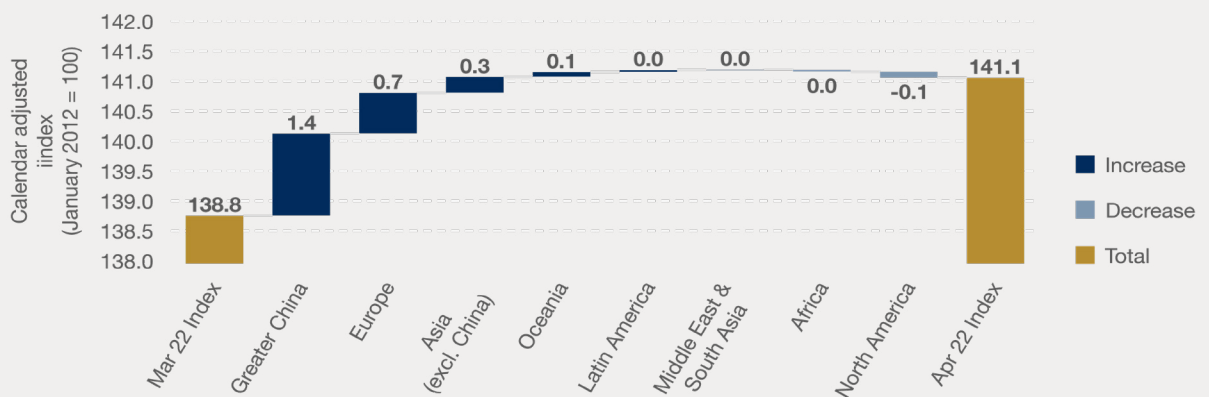
Drewry Global Container Port Throughput Index

European volumes remained below 2021 levels, with the ongoing crisis in Ukraine driving steep rises in energy costs and consequentially impacting regional manufacturing and consumer demand.

Africa recorded a 15.2% YoY reduction in throughput in April 2021, but the sample size is small and heavily weighted to South Africa, where port handling in April was impacted by severe flooding in the KwaZulu-Natal province.

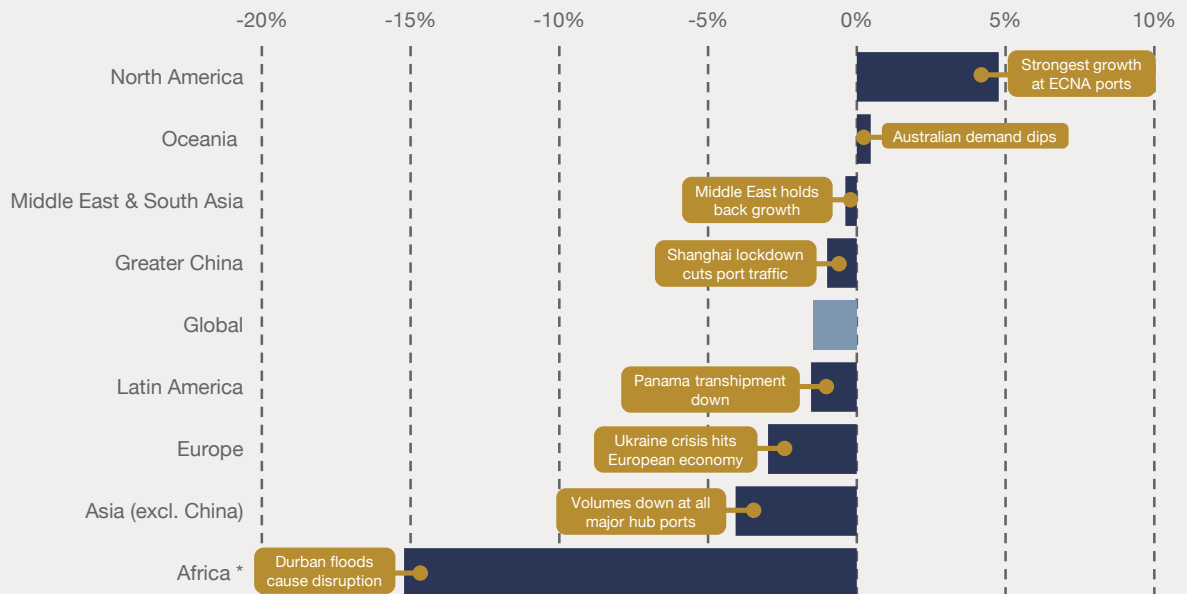
Ukraine crisis impacts European economy, where port volumes remained down YoY

Figure 1.2 Drewry Global Container Port Throughput Index - growth by region, April 2022 vs March 2022



Source: Drewry Maritime Research

Figure 1.3 Regional summary - growth decline in throughput, April 2022 vs April 2021



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

Source: Drewry Maritime Research

Drewry Global Container Port Call Index

Port calls drop 9% in Europe as carriers streamline services to cope with congestion

As detailed in Figure 1.4, the Drewry Global Container Port Call Index showed signs of improvement in May 2022, with the total number of port calls up 1.3% MoM and total vessel capacity up 2.4% MoM. However, both port calls and capacity remained below May 2021 levels, indicating that congestion continues to undermine the efficiency of global container shipping services.

Figure 1.5 provides a summary of regional activity on an annualised basis. The number of port calls increased in Asia (excluding China), Oceania, Latin America, and the Middle East and South Asia. However, the average vessel size has fallen in all of these markets, resulting in a YoY reduction in the total vessel capacity calling at the regional sample ports.

The steepest reductions in total vessel calls (-8.9% YoY) and vessel capacity (-9.7% YoY) was recorded in Europe, where carriers have streamlined port calls in response to the growing port congestion.

Average vessel size handled across our global port sample fell 2.8% YoY in May 2022, down 5.2% since May 2019.

Greater China and Africa are the only regions recording an increase in average vessel size over the past year, with a reduction in average vessel size in all other markets. The largest reduction has been experienced in Oceania, where the average vessel size fell 8.1% YoY to less than 4,200 teu (vs. 4,500 teu in May 2021). However, this has been partially offset by the 2.2% YoY increase in total port calls.

Drewry Global
Container Port Call
Index up 1.3% MoM
in May 2022

Streamlining of
services results in 9%
YoY drop in European
port calls

Average vessel size
handled across the
global port sample
down 2.8% YoY

Table 1.1 Development of average vessel size by region, 2019-2022

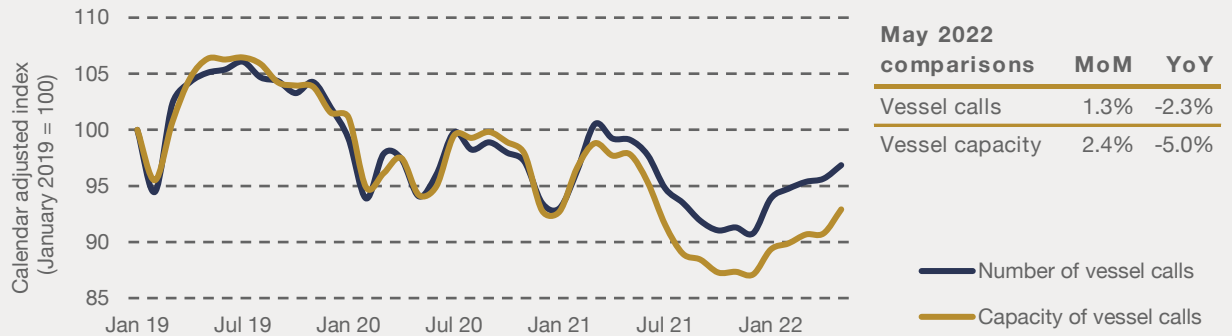
	May-19	May-20	May-20 vs May-19	May-21	May-21 vs May-20	May-22	May-22 vs May-21	May-22 vs May-19
Global	4,494	4,447	-1.0%	4,384	-1.4%	4,261	-2.8%	-5.2%
Greater China	5,136	4,908	-4.4%	4,786	-2.5%	4,848	1.3%	-5.6%
Asia (excl. China)	3,387	3,300	-2.6%	3,269	-0.9%	3,067	-6.2%	-9.4%
North America	6,094	6,191	1.6%	6,342	2.4%	6,083	-4.1%	-0.2%
Europe	4,498	4,418	-1.8%	4,381	-0.8%	4,341	-0.9%	-3.5%
Middle East & South Asia	5,929	5,912	-0.3%	5,268	-10.9%	4,975	-5.6%	-16.1%
Latin America	4,827	5,063	4.9%	5,120	1.1%	4,954	-3.2%	2.6%
Oceania	4,200	4,413	5.1%	4,530	2.6%	4,163	-8.1%	-0.9%
Africa	3,887	4,026	3.6%	3,869	-3.9%	3,893	0.6%	0.2%

Note: based on total monthly container vessel calls recorded at a sample of more than 170 worldwide ports, ports included in each region are detailed in the Appendix

Source: Drewry Maritime Research

Drewry Global Container Port Call Index

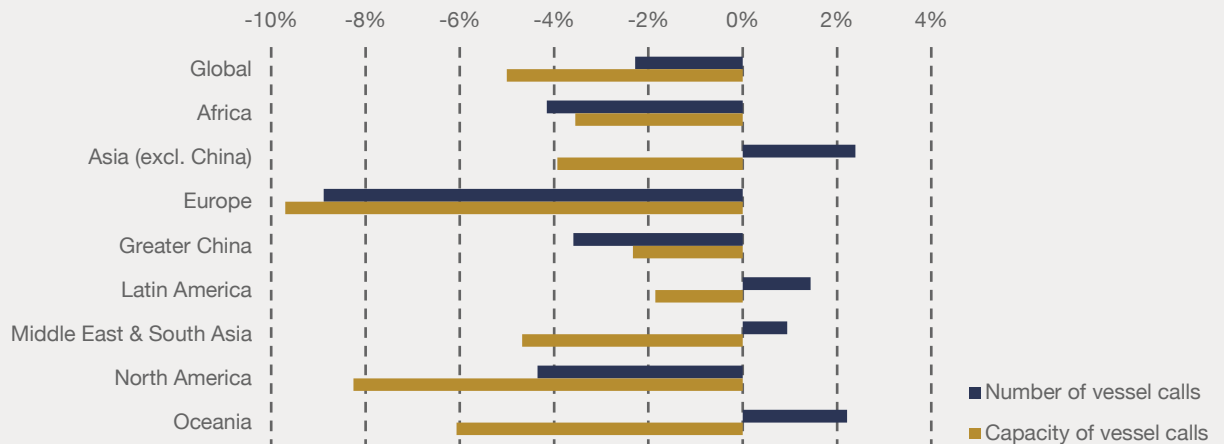
Figure 1.4 Global Port Call Index



Note: The Drewry Global Port Call Index measures the growth/decline in total container vessel calls across a sample of over 170 ports worldwide which together handle over 80% 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

Figure 1.5 Regional summary - growth/decline in number and capacity of vessel calls, May 2022 vs. May 2021



Source: Drewry Maritime Research

Drewry Global Container Port Performance Index

Pre-berth waiting time remains historically high despite MoM reduction

The Drewry Global Container Port Performance Index continued to improve in May 2022, with the index measuring total call duration down 0.9% YoY and the index measuring duration per 1,000 teu vessel capacity falling 1.9% YoY, indicating an overall improvement in port turnarounds.

Average call durations fall 1% MoM, but remain almost 9% higher YoY

Drewry Global Container Port Performance Index

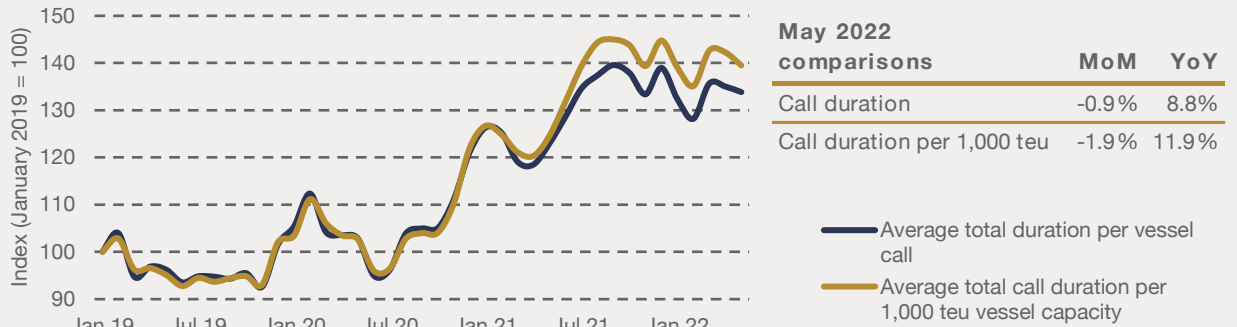
The index remains at elevated levels compared to May 2021, with average duration per vessel call up 8.8% and average duration per 1,000 teu vessel capacity up 11.9% YoY.

Total call duration is a factor of cargo volumes, but is also impacted by vessel waiting time and terminal productivity.

Figure 1.7 summarises global average port call duration, which at 1.64 days in May 2022 was only marginally lower than the 1.66 days recorded in April 2022.

Average pre-berth waiting time is 20% higher YoY

Figure 1.6 Drewry Global Container Port Performance Indices



Note: The Drewry Global Port Performance Index measures average call duration on a monthly basis across a sample of over 170 ports worldwide. Port performance is measured on both a per call and capacity adjusted basis (i.e., per 1,000 teu vessel capacity). 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

Looking at the components of the average port call:

- Average pre-berth waiting increased 2.0% MoM to 0.45 day, but remains 19.9% above May 2021 levels (0.37 days)
- Average terminal time dropped 3.7% MoM to 0.83 day, but is 5.7% higher YoY
- Other port call time rose 2.3% MoM to 0.36 day, and is 8.8% higher YoY

Average terminal time dropped 4% MoM to 0.8 day

The increase in average terminal time can be partly explained by higher average cargo exchanges, noting that post-pandemic total port calls have been trending downwards despite rising port throughput. Terminal yards are more likely to become congested when handling very large parcel sizes, with the increased peaking factor resulting in reduced terminal productivity.

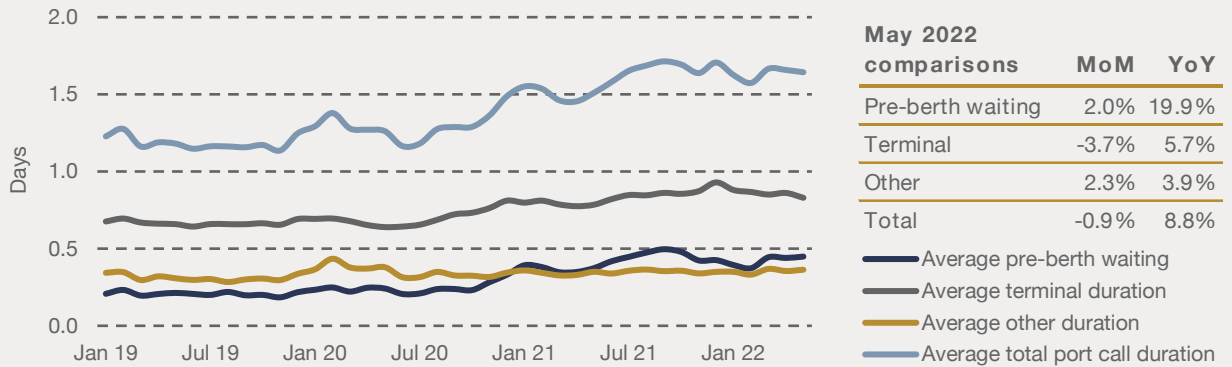
Figure 1.8 provides a snapshot of regional port congestion, comparing average pre-berth waiting time in May 2022 to 2019 average levels.

Congestion has worsened in Greater China, with average pre-berth waiting time increasing 14% MoM to 0.8 day. In May 2022, average pre-berth waiting was 1.0 day or higher at Shanghai, Ningbo and Shenzhen.

Average pre-berth waiting up 14% MoM to 0.8 day in Greater China

Drewry Global Container Port Performance Index

Figure 1.7 Global average port call duration



Note: Average port call duration is based on AIS tracking of all container vessel calls at a sample of more than 170 ports worldwide which together handle over 80% 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

While ports in the key consumer markets remained congested, there were some signs of improvement in May 2022. In North America average pre-berth waiting time fell 17% MoM to 0.9 day (April 2022: 1.2 days), while in Oceania waiting time fell 28.2% MoM to 0.2 day (April 2022: 0.3 day). Pre-berth waiting in Europe remains stable at 0.4 day.

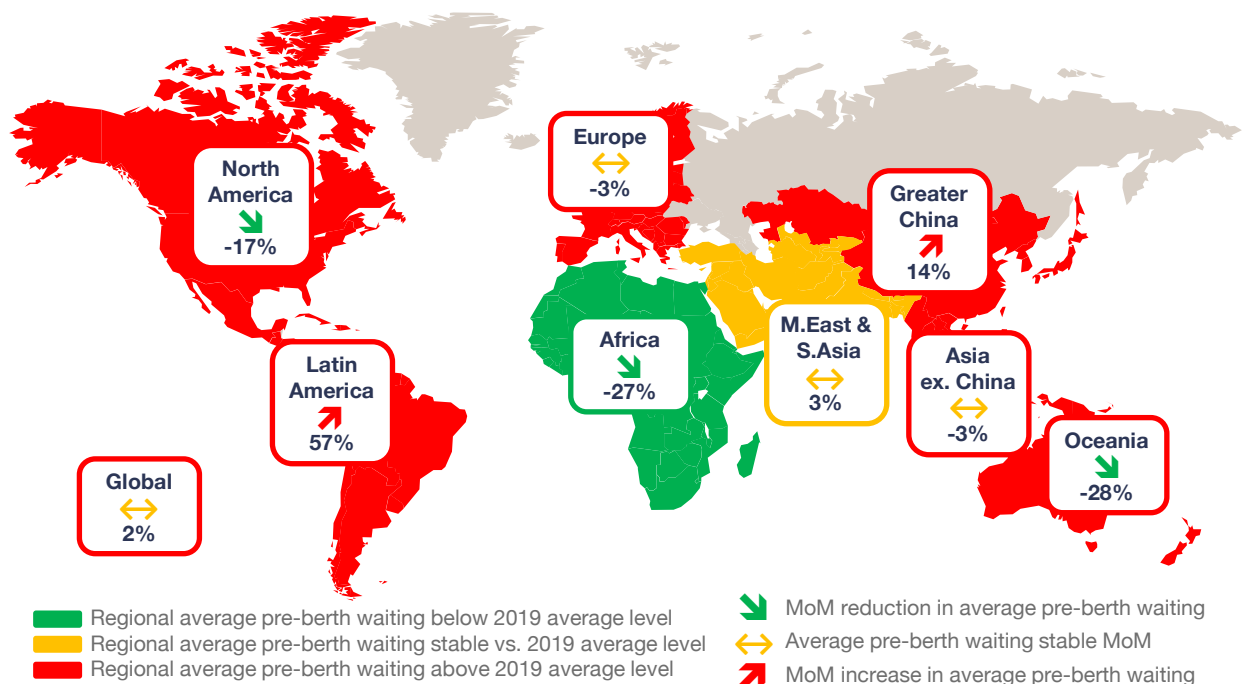
Pre-berth waiting time down 17% in North America

Pre-berth waiting time has surged in Latin America, increasing by 57.4% to 0.3 day (April 2022: 0.2 day), 84% higher than the 2019 average.

Pre-berth waiting remains high by global standards in Africa, but average waiting time continued to track downwards, falling 26.6% to 0.6 day (vs. 0.8 day in April 2022), and is now more than 30% lower than the average 0.9 day waiting time experienced in 2019.

Average waiting time at African ports now 30% below 2019 levels

Figure 1.8 Port congestion by region, May 2022



Source: Drewry Maritime Research

Greater China ports monitor

 Throughput -1.0% YoY Negative	 Port calls -3.6% YoY Negative	 Waiting -3.2% MoM Positive	 Terminal Time 0.2% MoM Stable
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Drewry Greater China Container Port Throughput Index

Shanghai volumes plummet 25% MoM due to Covid lockdowns

The full impact of China's zero-Covid policy was evident in April 2022, with container handling at Shanghai dropping 25% MoM. Although neighbouring Ningbo was able to pick up some of the slack, handling a record breaking 2.8 mteu, volumes across the region's ports were down 1% YoY.

The Greater China Container Port Throughput Index increased 2.6% MoM in April 2022, up to 150.1 points from 146.3 points in March 2022. However, the index continued to underperform on an annualised basis, down 1.0% YoY.

Container handling at Shanghai fell 25% (-1.0 mteu) MoM in April 2022 due to the impact of lockdown measures on the supply chain. Although the port remained operational, the lockdown impacted manufacturing and trucking sectors.

Yingkou, where operations were adversely impacted by Covid-related movement restrictions, reported 11% MoM and 36% YoY reduction in container handling.

On a more positive note, volumes at Ningbo increased 11% (0.3 mteu) MoM to more than 2.8 mteu – the port's highest-ever monthly throughput. Shenzhen also bounced back strongly from the March 2022 lockdown, posting a 0.4 mteu or 18% MoM increase in traffic.

Container handling drops 25% MoM in Shanghai due to lockdown measures

Ningbo traffic up 15% MoM to record highest-ever monthly throughput

Figure 2.1 Greater China Container Port Throughput Index

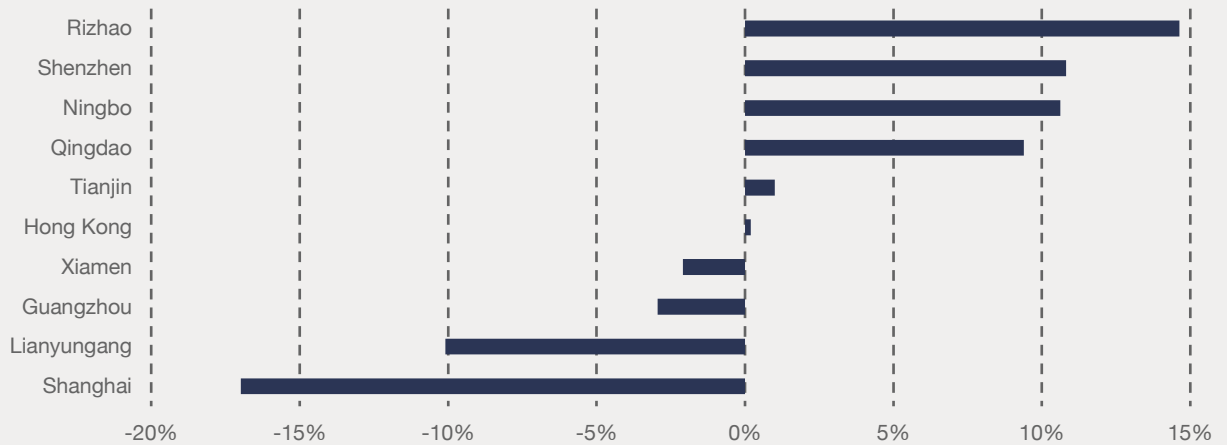


April 2022 comparisons	MoM	YoY
Port throughput	2.6%	-1.0%

Source: Drewry Maritime Research

Drewry Greater China Container Port Throughput Index

Figure 2.2 Greater China - growth / decline in throughput, April 2022 vs April 2021 for selected ports



Source: Drewry Maritime Research

Drewry Greater China Container Port Call Indices

Index moves upwards in May, but carriers omit mainline calls at Shanghai

The Greater China Container Port Call Indices showed mild improvement in May 2022, with the index measuring total number of port calls moving up 3.2% MoM and the index measuring total vessel capacity up 2.5% MoM.

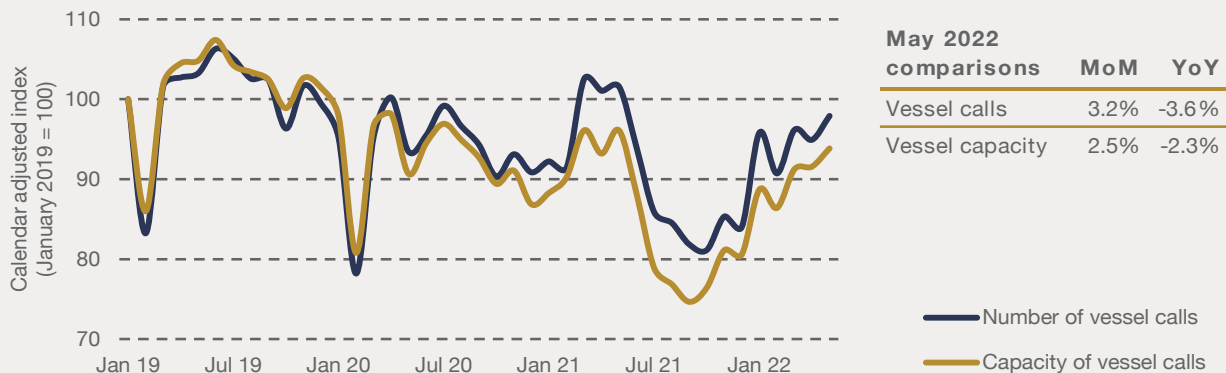
Shanghai handled 6.3% more vessel calls in May 2022 compared to the preceding month, although total capacity of the vessel calls was up by just 0.9% MoM. Calls from mainline vessels with capacity of 12,500 teu were down 6% MoM in May 2022 as carriers implemented a programme of blank sailings and call omissions.

On an annualised basis, the vessel call index was 3.6% below May 2021 level, while the vessel capacity index was 2.3% lower. Average vessel size increased from 4,800 teu to 4,850 teu over the same period.

Greater China vessel call index up 3.2% MoM in May 2022

Mainline calls at Shanghai down 6%

Figure 2.3 Drewry Greater China Container Port Call Index



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

Drewry Greater China Port Performance Indices

Pre-berth waiting time up 14% MoM in May

The Greater China Port Performance Index measuring average call duration deteriorated in May 2022 for both the total call duration and the total call duration per 1,000 teu metrics. Average total call duration increased 3.9% MoM and call duration per 1,000 teu vessel capacity was up 4.6%.

Across the Greater China regional port, average call duration was 1.9 days in May 2022, 88% higher than the 1.4 days recorded in May 2021. Increased pre-berth waiting accounted for 80% (0.4 day) of the increased duration in call length, with increased terminal accounting for the remaining 20% (0.1 day) uplift.

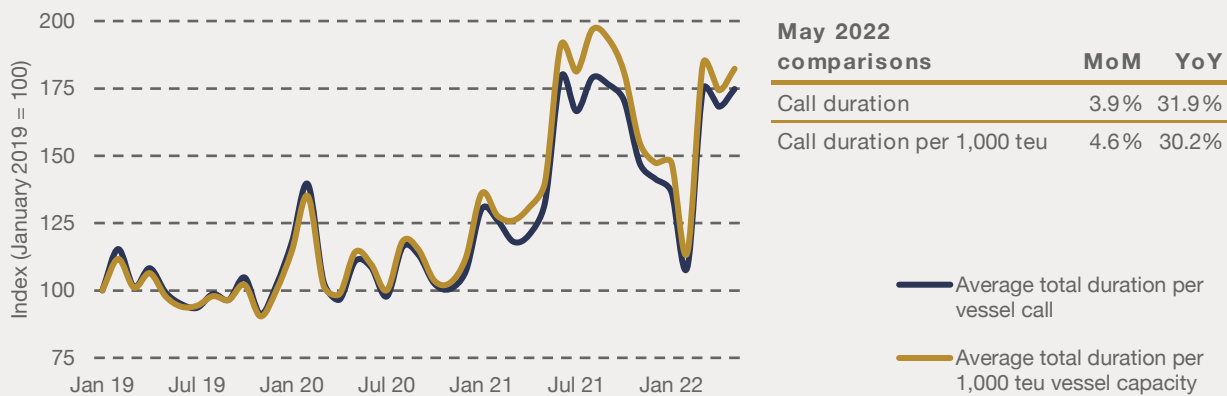
Average pre-berth, which reached 0.8 day in May 2022, was the highest recorded since January 2019 (i.e. start data of the Port Performance Index). Waiting time was the highest in Shenzhen (1.4 days), Ningbo (1.3 days) and Shanghai (1.0 day).

Average terminal time, although dropping 1.6% MoM, was up 17.5% YoY – well above the level that can be accounted for by underlying volume growth.

Steep increase in pre-berth waiting takes average call duration 88% higher YoY

Average waiting time in Shenzhen was 1.4 days in May 2022

Figure 2.4 Drewry Greater China Container Port Performance Index

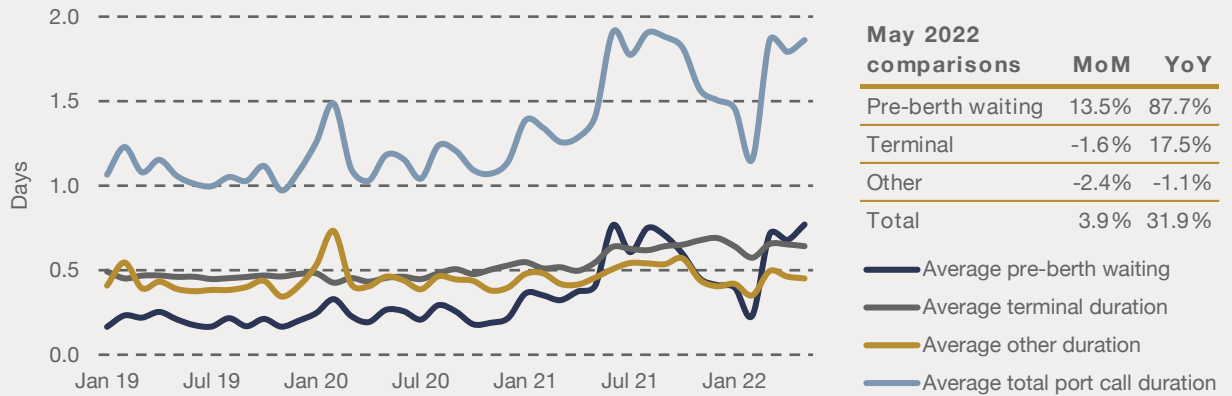


Note: November 2021 data for Greater China region is estimated because new Chinese data regulation resulted in temporary reduction in recording of vessel AIS transmissions.

Source: Drewry Maritime Research

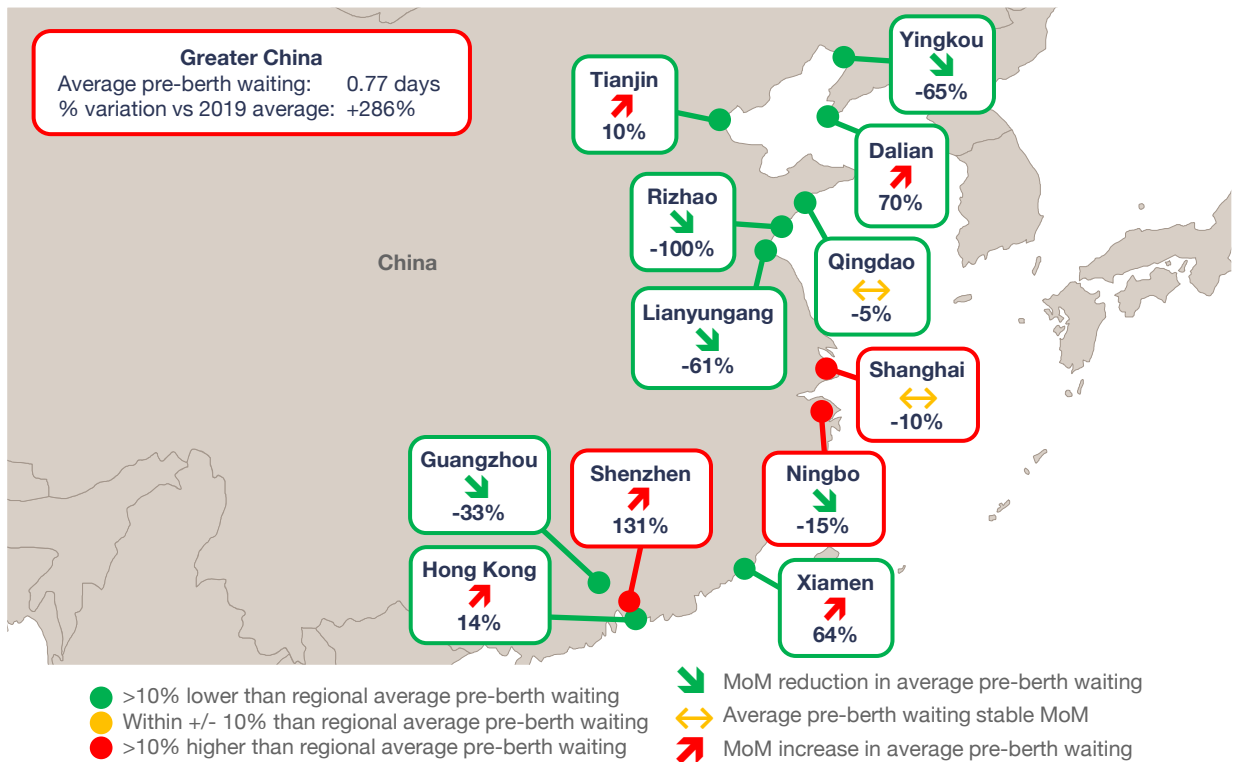
Drewry Greater China Port Performance Indices

Figure 2.5 Greater China average port call duration



Source: Drewry Maritime Research

Figure 2.6 Greater China, pre-berth waiting time, May 2022



Source: Drewry Maritime Research

Asia (excluding China) ports monitor

 Throughput -4.1% YoY Negative	 Port calls +2.4% YoY Positive	 Waiting -3.2% MoM Positive	 Terminal Time +0.2% MoM Stable
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Drewry Asia (excluding China) Container Port Throughput Index

Ripple effect from China lockdown impacts Singapore and Kaohsiung

The Asia (excluding China) Container Port Throughput Index is down 4% YoY as the impact of the Chinese lockdown spreads to the regional hub ports.

The Asia (excluding China) Container Port Throughput Index remained broadly stable in April 2022, up by just 0.9% MoM, which is due to the calendar adjustment factor, with unadjusted regional port handling figures actually down by 2.4%.

Looking at the longer-term performance, the index is 4.1% below the level recorded in April 2021 and 0.5% below the level it reached in April 2019.

Traffic across the main regional hubs has been adversely impacted by the Covid lockdowns in China, with disruption spreading across intra-regional supply chains. While volumes remained broadly stable MoM in Busan and Port Klang, Singapore recorded a 2% drop in traffic and Kaohsiung handling fell by 6%.

In North Asia, the steepest drop in volumes was seen across the Russian ports which registered an average 18% MoM throughput reduction. Vladivostok was the worst affected, with volumes falling 24% (25,000 teu) MoM.

In Taiwan, MoM reductions in traffic were reported at Keelung (-5%) and Taichung (-8%), although Taipei recorded a 6% MoM increase.

Asia (excluding China) index falls 4% YoY

Singapore records 2% MoM downturn in handling

Songkran holidays result in lower volumes at Laem Chabang

Figure 3.1 Asia (excluding China) Container Port Throughput Index

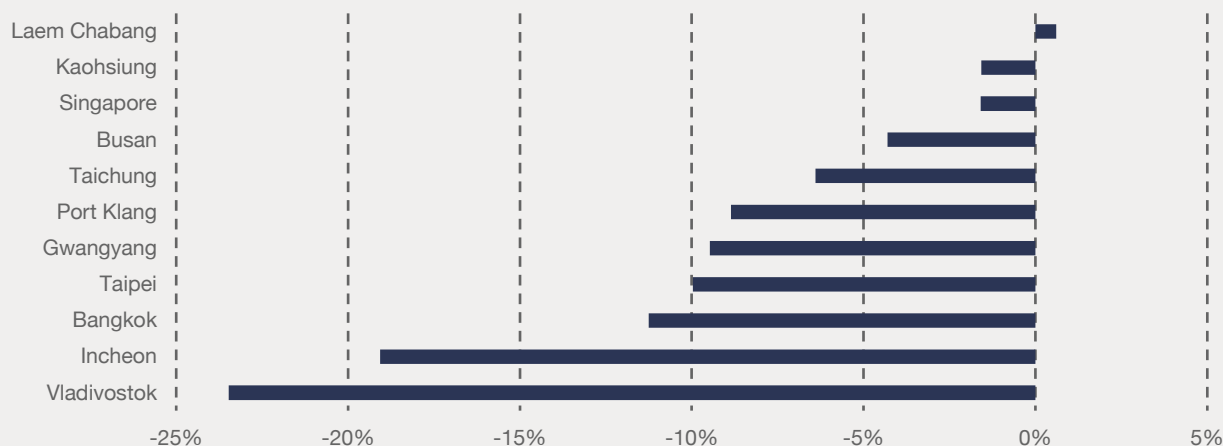


Source: Drewry Maritime Research

Drewry Asia (excluding China) Container Port Throughput Index

Traffic fell back 3% MoM at Manila, but remains up 12% YoY. Meanwhile in Thailand, the 11% MoM downturn in traffic at Laem Chabang can be attributed to the Songkran holiday closures.

Figure 3.2 Asia (excl. China) - growth/decline in throughput, April 2022 vs April 2021 for selected ports



Source: Drewry Maritime Research

Drewry Asia (excluding China) Container Port Call Indices

Call volumes down in Singapore and Port Klang, up at Tanjung Pelepas

The Asia (excluding China) Container Port Call Indices fell back in May 2022, with the total vessel call index down 2.3% MoM and vessel capacity index down 0.7%.

Vessel calls up 2.4% YoY

The vessel calls index recorded 2.4% YoY growth, although the vessel capacity index dropped by 3.9% over the same period. Average vessel size fell 6.2% from 3,270 teu in May 2021 to 3,070 teu in May 2022.

Average vessel size down 6% to 3,070 teu

Call volumes dropped 4% MoM at Singapore and 1% MoM at Port Klang, but increased 7% MoM at Tanjung Pelepas.

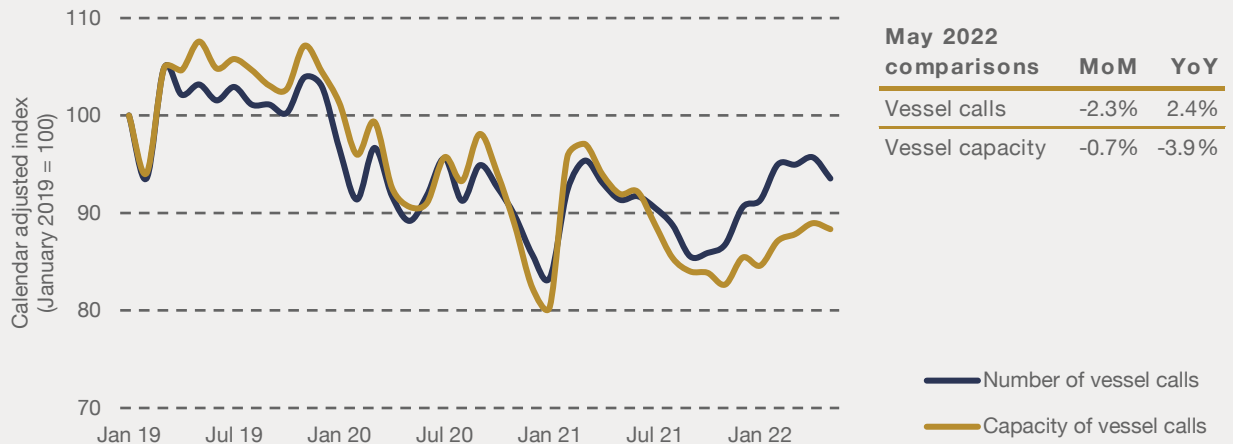
Elsewhere in Southeast Asia, vessel calls were down MoM across Vietnam, with 3% fewer calls at Haiphong and 8% fewer calls at the Ho Chi Minh City facilities. Calls at Laem Chabang made a strong recovery after the Songkran holiday, up 5% MoM. The main Indonesia ports handled fewer vessels – Tanjung Priok call volumes down 12% MoM and Surabaya recorded 24% fewer calls in May 2022 compared to April 2022.

Singapore call volumes down 4% MoM

In North Asia call volumes climbed 6% MoM at Busan and 7% MoM at Incheon, but dropped 3% MoM at Kaohsiung.

Drewry Asia (excluding China) Container Port Call Indices

Figure 3.3 Drewry Asia (excl. China) Container Port Call Index



Source: Drewry Maritime Research

Drewry Asia (excluding China) Port Performance Indices

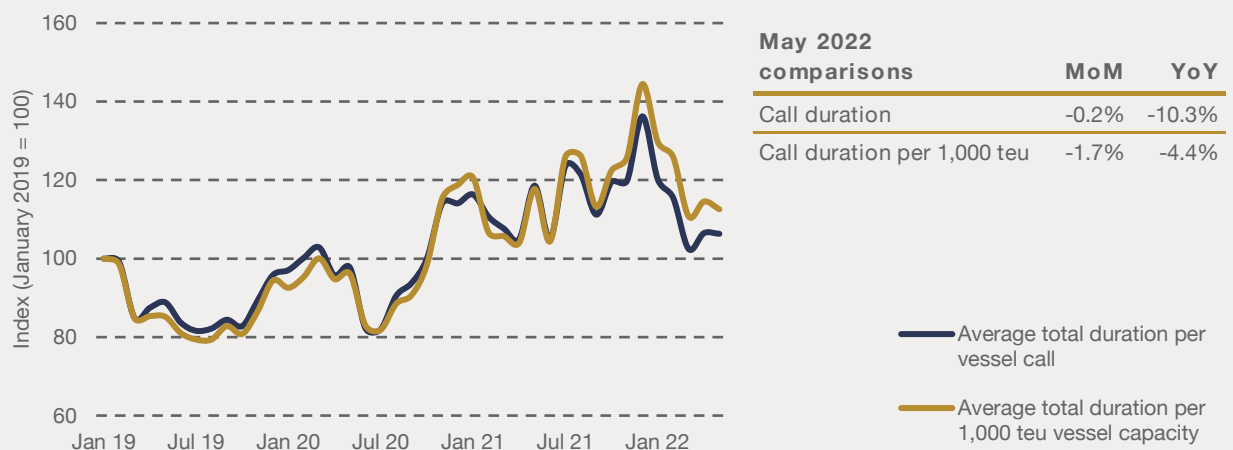
Average pre-berth waiting time drops 34% YoY

The Asia (excluding China) Port Performance Index showed a minor improvement on an MoM basis in May 2022, with total call duration down 0.2% and the total call duration per 1,000 teu metrics down 1.7%.

Total call duration in May 2022 was 1.1 days, above the 2019 average of 0.9 day, but 10.3% lower than the 1.2 days average call duration recorded in May 2021. The 34% YoY reduction in average pre-berth waiting to 0.2 day was the key driver of this improvement, but pre-berth waiting still remains high compared to 2019 average of 0.1 day.

Average call duration down 10% YoY

Figure 3.4 Drewry Asia (excl. China) Container Port Performance Index



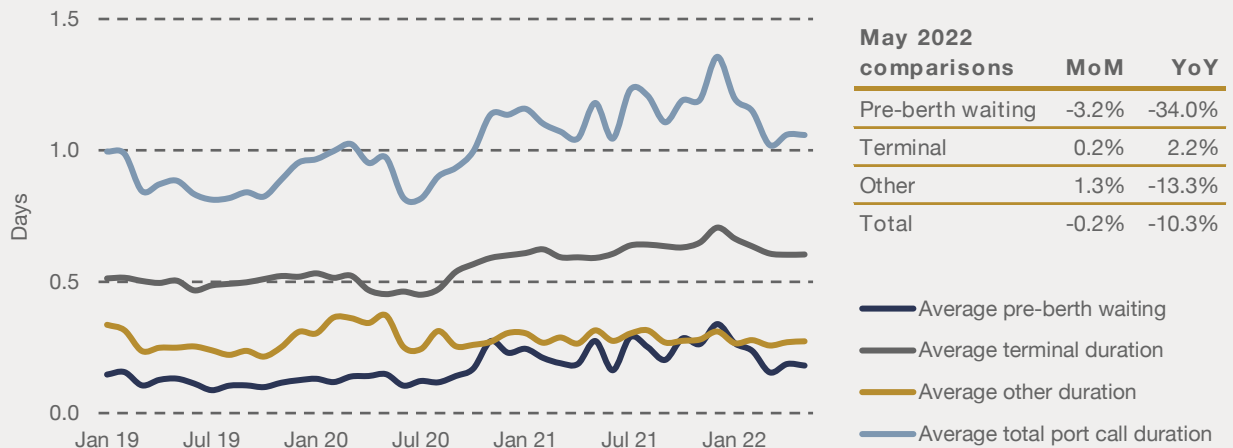
Source: Drewry Maritime Research

Drewry Asia (excluding China) Port Performance Indices

Ports in North Asia operated with minimal delays in May 2022. While congestion remained higher across Southeast Asia, the situation improved in Ho Chi Minh, where average pre-berth waiting time fell to 0.2 days (April: 0.5 day). Berthing delays remained high in Manila (1.0 day), Tanjung Priok (0.7 day) and Port Klang (0.5 day).

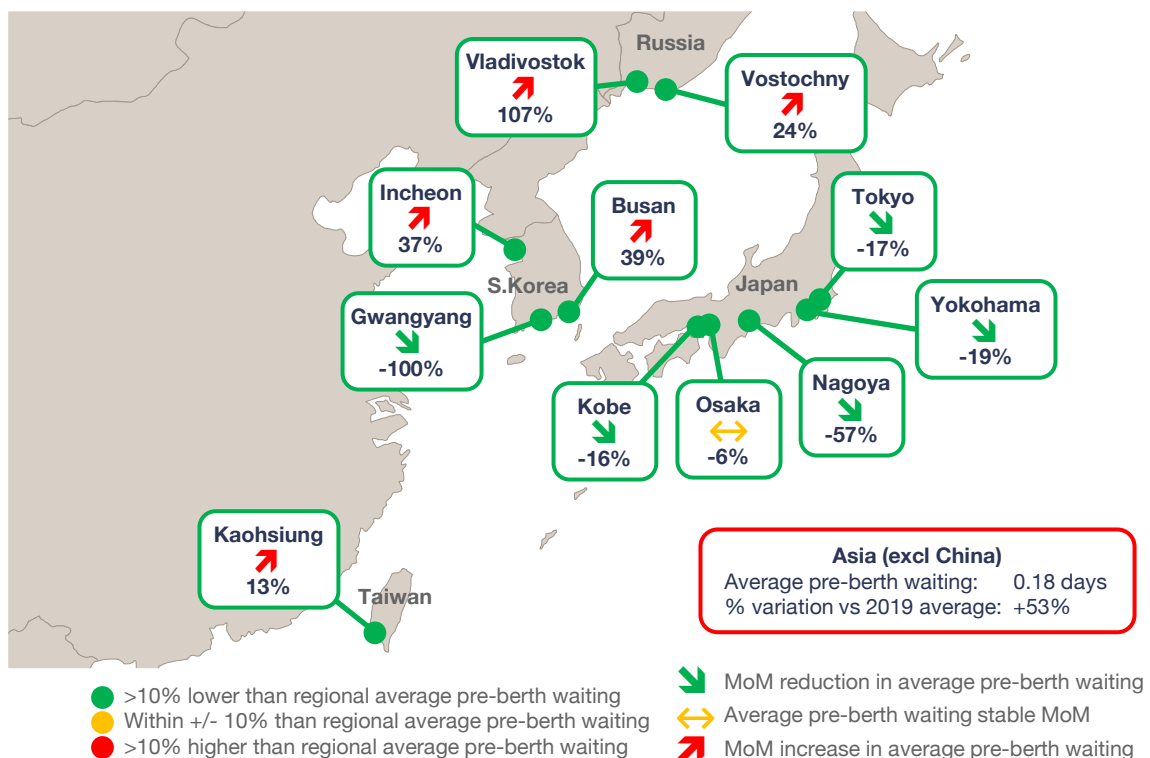
Waiting time down
68% MoM in Ho Chi
Minh City

Figure 3.5 Asia (excl. China) average container port call duration



Source: Drewry Maritime Research

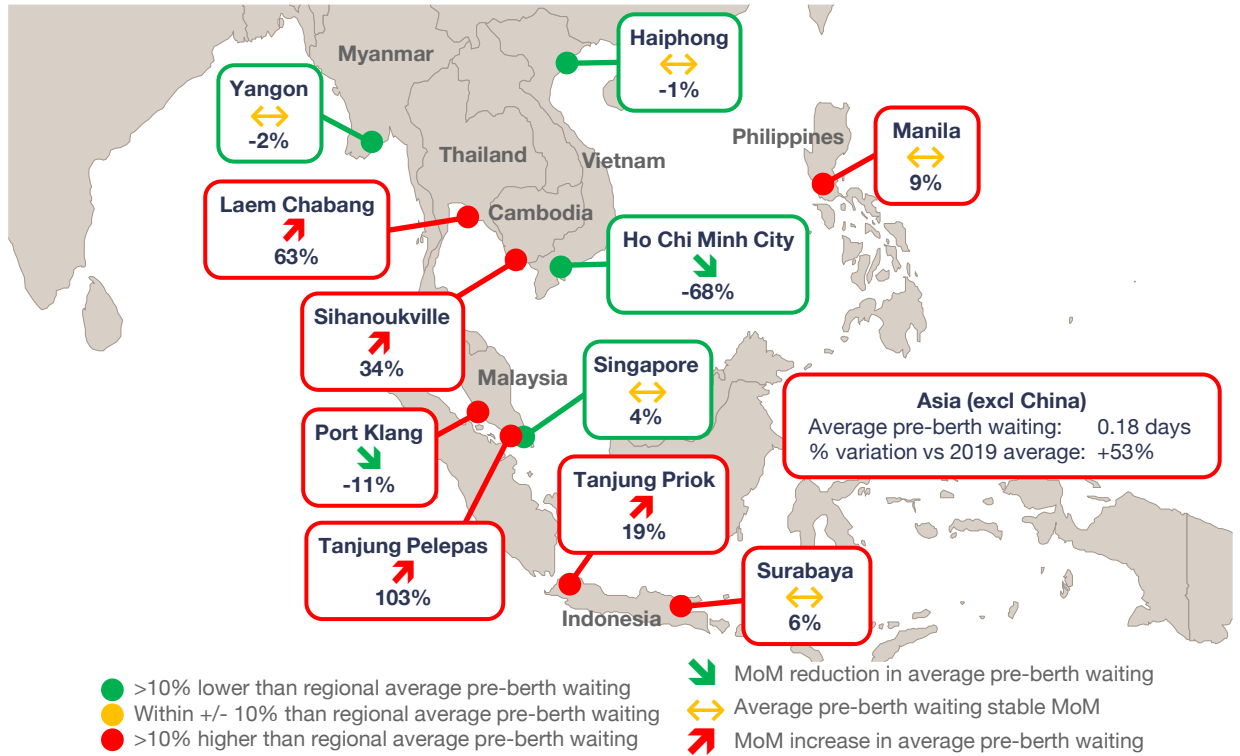
Figure 3.6 North Asia, pre-berth waiting time, May 2022



Source: Drewry Maritime Research

Drewry Asia (excluding China) Port Performance Indices

Figure 3.7 South East Asia, pre-berth waiting time, May 2022



Source: Drewry Maritime Research

North America ports monitor

 Throughput 4.8% YoY Positive	 Port calls -4.4% YoY Negative	 Waiting -16.9% MoM Positive	 Terminal Time -3.1% MoM Positive
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Drewry North America Container Port Throughput Index

North America Index stabilises in April 2022

Growth has plateaued across USWC and Canada ports, with volumes down 1% YoY. USEC port throughput figures were flat MoM, but up 10% YoY. Houston reports highest-ever monthly throughput total and Lazaro Cardenas traffic surges 80% YoY.

The North America Container Port Throughput Index remained broadly stable in April 2022, dipping by just 0.6% MoM to 170.1 points. Without the impact of the calendar adjustment, the underlying growth in port throughput was down 3.8% MoM. However, YoY growth remained positive, with the index recording a 4.8% increase.

Growth in handling has plateaued across USWC and Canada markets, with volumes down 1% YoY. Again, Oakland reported the largest reduction of 15% YoY. Traffic via the San Pedro Bay ports (i.e. Los Angeles and Long Beach) fell 6% MoM, but was up by just under 1% YoY.

Container handling at USEC ports was flat MoM, but up 10% YoY. Savannah volumes are recovering, up 11% MoM to 0.5 mteu, which is 6% above April 2021 traffic levels. Charleston volumes were flat MoM, but up 17% YoY to 0.32 mteu.

Leading US Gulf Coast port, Houston recorded its highest-ever monthly throughput in April 2022, handling over 0.33 mteu, which was 21% higher than the traffic reported in April 2021.

Growth slowed a little in the Mexican market, where port throughput dropped 5% MoM, but was up 11% YoY. The strongest growth was recorded at Lazaro Cardenas, where volumes in April 2022 were 80% higher than in April 2021. The port has recently launched new intermodal services connecting to the US Midwest, positioning itself as an uncongested alternative to the congested USWC ports.

North American index up 4.8% YoY in April 2022

LA/LB volumes drop 6% MoM

Houston records highest-ever monthly throughput in April 2022

Lazaro Cardenas traffic up 80% YoY

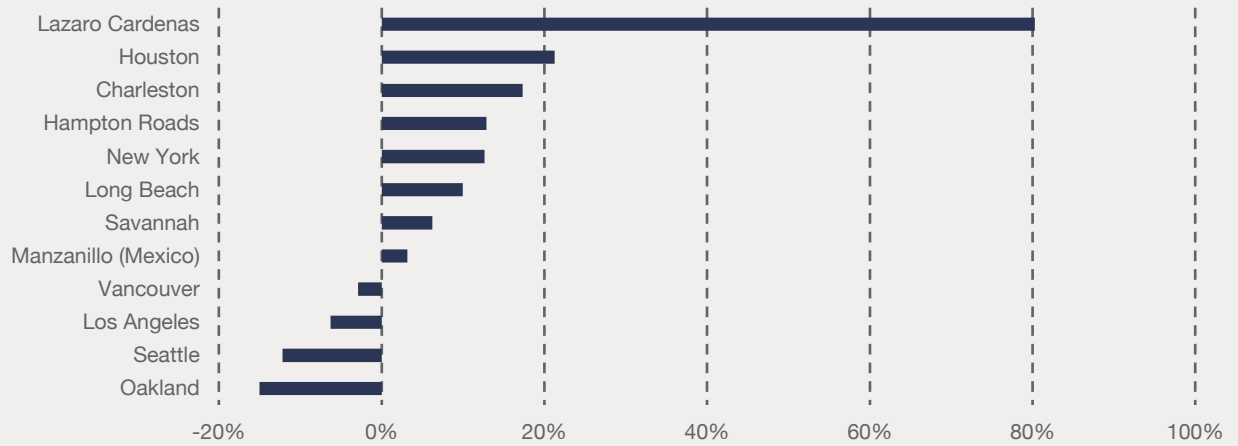
Figure 4.1 Drewry North America Container Port Throughput Index



Source: Drewry Maritime Research

Drewry North America Container Port Throughput Index

Figure 4.2 North America - growth/decline in throughput, April 2022 vs April 2021 for selected ports



Source: Drewry Maritime Research

Drewry North America Container Port Call Indices

Congested East Coast ports see steep reduction in vessel calls

The North America Container Port Call Indices picked up in May 2022, with total vessel calls up 4.7% MoM and vessel capacity up 5.6% over the same period.

On an annualised basis the port call index fell 4.4%, while the vessel capacity index dropped 8.3%. Average vessel size fell 4.1% from 6,340 teu in May 2021 to 6,080 teu in May 2022.

Call volumes at Los Angeles were up 6% MoM in May 2022, but were down 11% YoY. Long Beach has fared better, with call volumes up 9% MoM and down just 3% YoY. Call volumes stabilised at Oakland on a MoM basis, but were down 9% YoY.

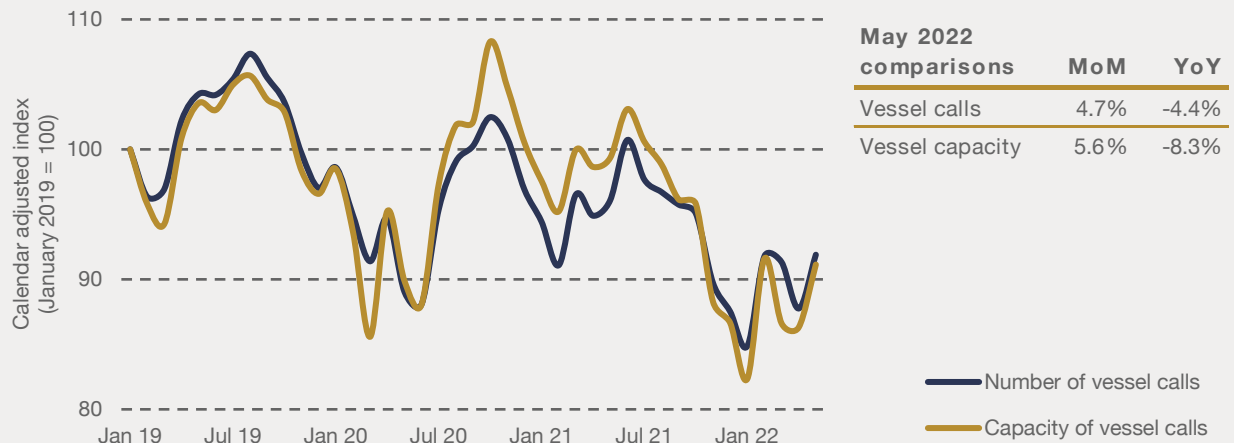
Savannah's 10% MoM increase in call volumes in May 2022 has been accompanied by an increase in average pre-berth waiting, which rose to 2.6 days (vs. April 2022: 1.6 days).

North America port call index up 4.7% MoM

Increase in calls results in higher average waiting time at Savannah

Drewry North America Container Port Call Indices

Figure 4.3 Drewry North America Container Port Call Index



Source: Drewry Maritime Research

Drewry North America Port Performance Indices

Three-quarters of US total pre-berth waiting occurred at East and Gulf Coast ports

The North America Port Performance Indices showed improved MoM in May 2022, with the index measuring average call duration dropping 8.4% and the index measuring average call duration per 1,000 teu vessel capacity down 9.1%.

North American port performance has however deteriorated on an annual basis, with the index measuring average call duration up 20.3% YoY in May 2022.

Average call duration fell to 3.0 days in May 2022, 8.4% lower than the 3.3 days recorded in April 2022. However, average call duration was 0.5 day higher than that recorded in May 2021, with increased pre-berth waiting accounting for 39% (0.2 day) of the increase and increased terminal time accounting for 33% (0.2 day) of the increase.

Average pre-berth waiting dropped 16.9% MoM in May 2022 to 0.9 day, but was 26.9% higher than the 0.7 day average waiting time recorded in May 2021.

While in 2021, waiting was primarily a West Coast problem, by 3Q21 congestion was spreading to the ports of East Coast and Gulf Coast. As detailed in Figure 4.6, in May 2021, West Coast ports accounted for 80% of the total pre-berth waiting delays. By May 2022, 75% of the total pre-berth waiting delays were incurred at East Coast and Gulf Coast ports.

USEC ports remained congested in May 2022, with average pre-berth waiting time worsening at Savannah (2.6 days, 63% MoM increase) and New York (1.5 days, 18% MoM increase), while remaining high but improving at Hampton Roads (1.7 days, -48% MoM reduction) and Charleston (0.6 day, -83% MoM reduction).

Average port call duration up 20% YoY in May 2022

Average pre-berth waiting delay 0.9 day in May 2022

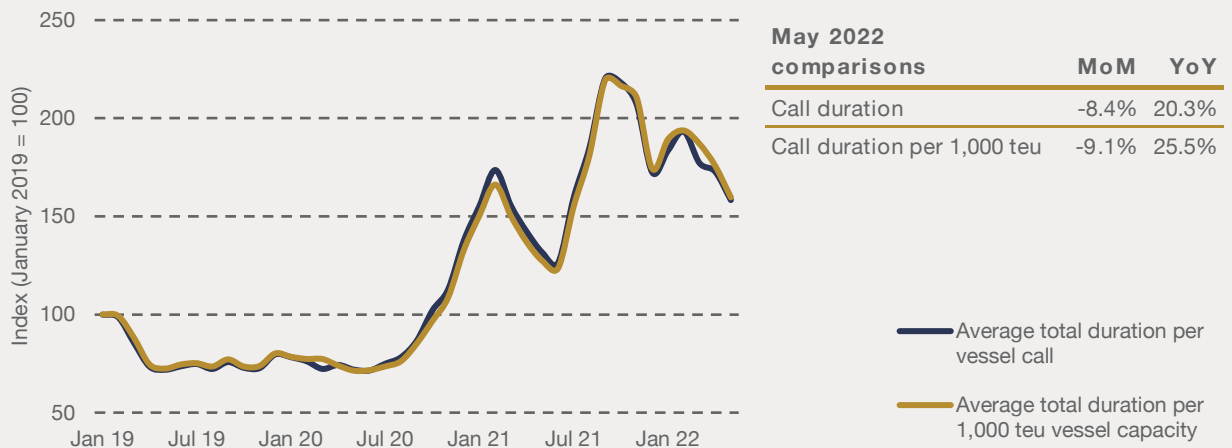
75% of pre-berth waiting delays incurred at East and Gulf Coast ports

Drewry North America Port Performance Indices

Waiting time at USWC ports continued to fall in May 2022, with average pre-berth waiting recorded at 0.8 day in Long Beach (April 22: 1.0 day) and 0.3 day in Los Angeles (April 22: 0.8 day). In contrast, average pre-berth waiting time at Canadian ports remained high: 2.8 days at Vancouver and 1.3 days at Prince Rupert.

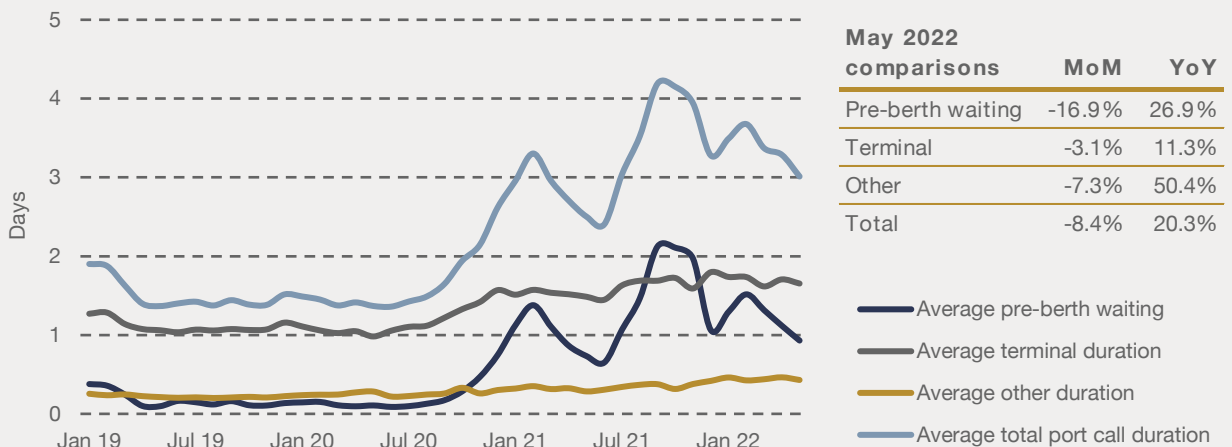
Savannah waiting time up 63% to 2.6 days in May 2022

Figure 4.4 Drewry North America Container Port Performance Index



Source: Drewry Maritime Research

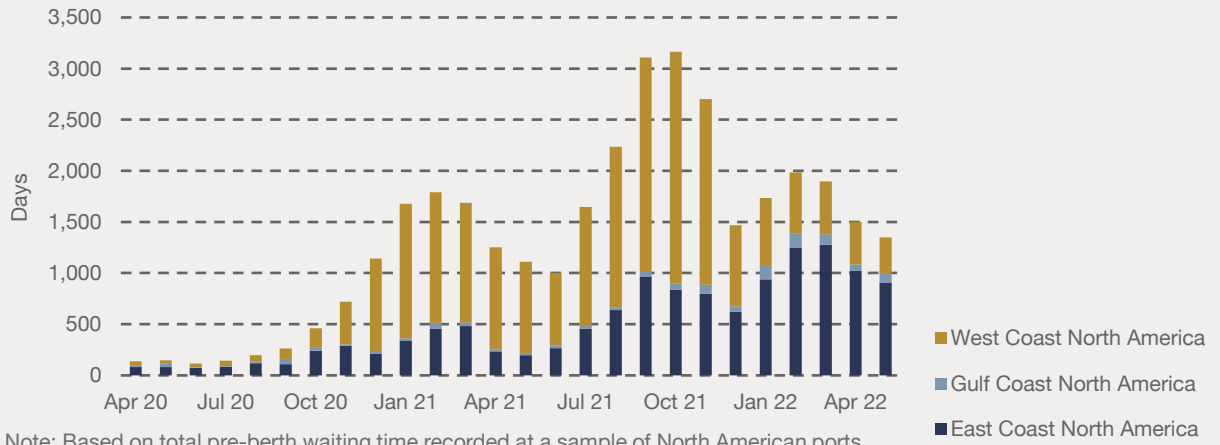
Figure 4.5 North America average container port call duration



Source: Drewry Maritime Research

Drewry North America Port Performance Indices

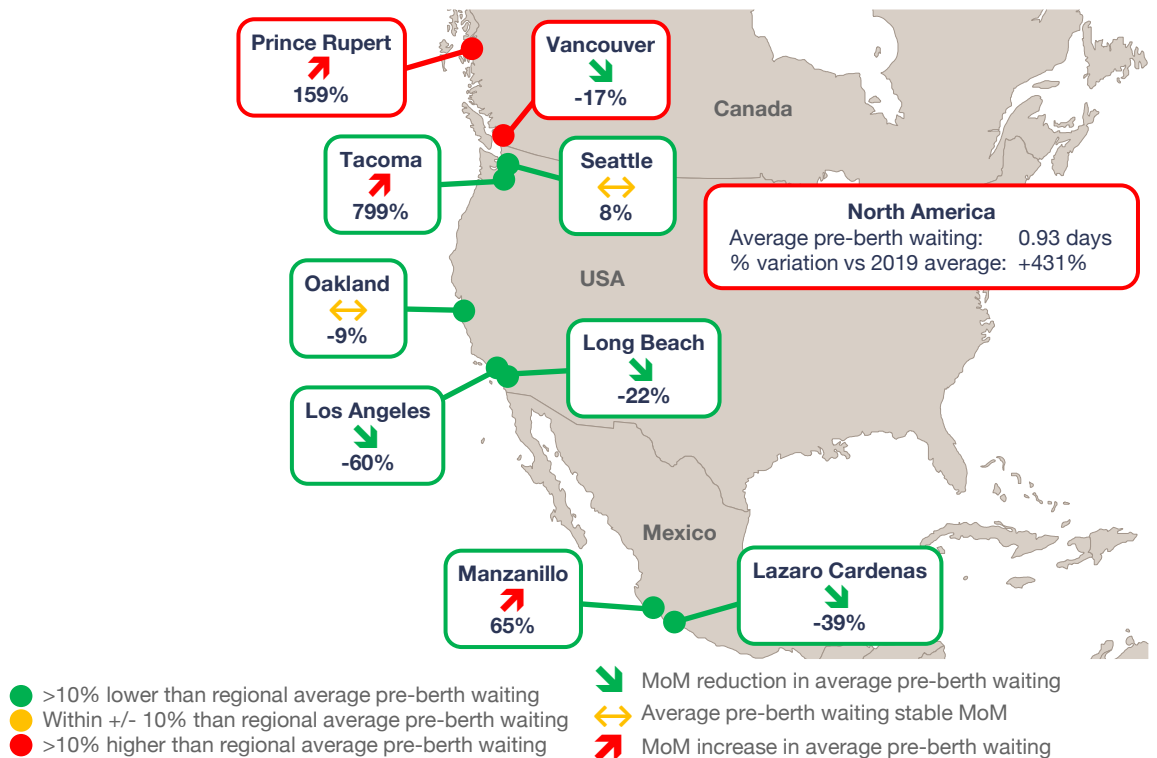
Figure 4.6 North America, total pre-berth waiting time by coast



Note: Based on total pre-berth waiting time recorded at a sample of North American ports.

Source: Drewry Maritime Research

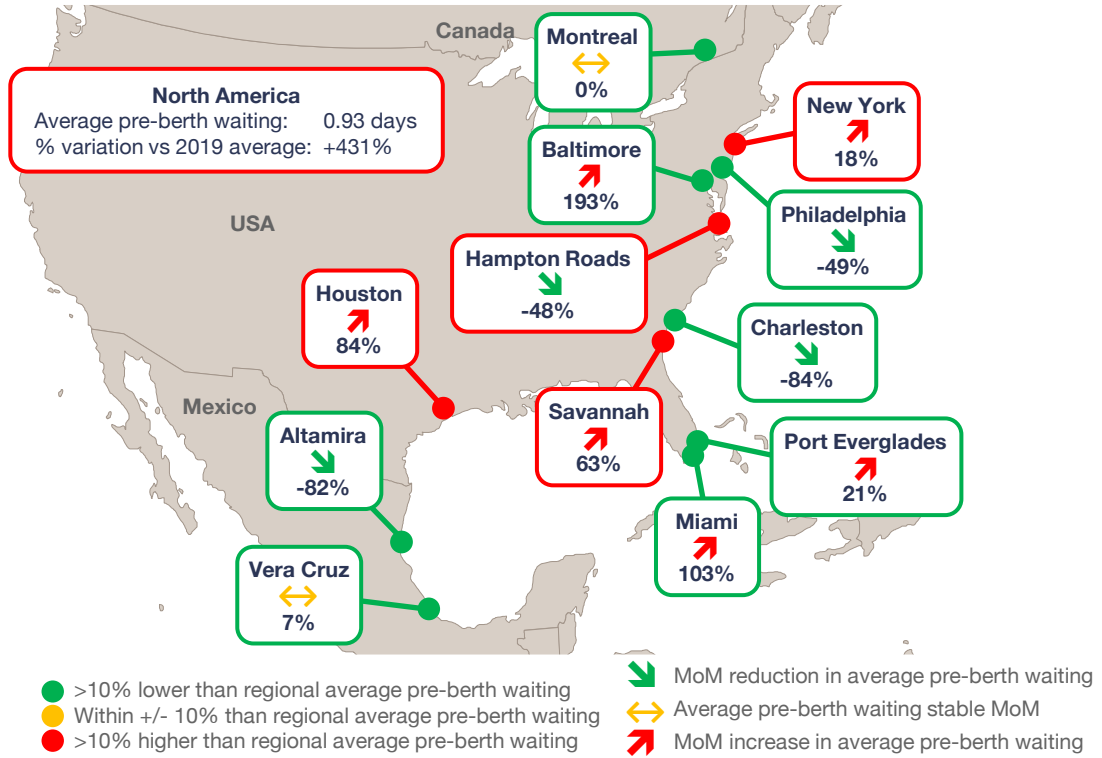
Figure 4.7 West Coast North America, pre-berth waiting time, May 2022



Source: Drewry Maritime Research

Drewry North America Port Performance Indices

Figure 4.8 East and Gulf Coast North America, pre-berth waiting time, May 2022



Source: Drewry Maritime Research

Europe ports monitor

 Throughput -3.0% YoY Negative	 Port calls -8.9% YoY Negative	 Waiting -3.1% MoM Positive	 Terminal Time -9.2% MoM Positive
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Drewry Europe Container Port Throughput Index

European Container Port Throughput Index down 3% YoY

The Europe Container Port Throughput Index recovered slightly in April 2022, but is 3% lower YoY. Volume fell 2% MoM at Antwerp-Zeebrugge and Bremerhaven. Valencia posted strong 30% MoM gains, but throughput fell at both Barcelona and Algeciras.

The European Container Port Throughput Index rose 3.8% MoM in April 2022, but was 3.0% lower YoY.

Valencia posted strong MoM gains in April 2022, with container handling up 30% to 0.46 mteu. In contrast, traffic levels fell 4% MoM at Algeciras and 6% MoM at Barcelona.

Congestion continued to impact port throughput across the main Northwest European ports, with volumes down 2% MoM at both Antwerp-Zeebrugge and Bremerhaven.

Throughput at Russian ports was down 35% YoY due to the sanctions imposed on the country following its invasion of Ukraine. The Baltic ports have seen the steepest drop, with St Petersburg traffic down 40% YoY, a drop of over 70,000 teu. Traffic has also plummeted at Kalingrad, where traffic fell 55% MoM to less than 10,000 teu. The port handled more than 40,000 teu in November 2021.

European Port Throughput Index down 3.0% YoY

Valencia container handling increased 30% MoM

Russian port volumes down 35% YoY due to sanctions

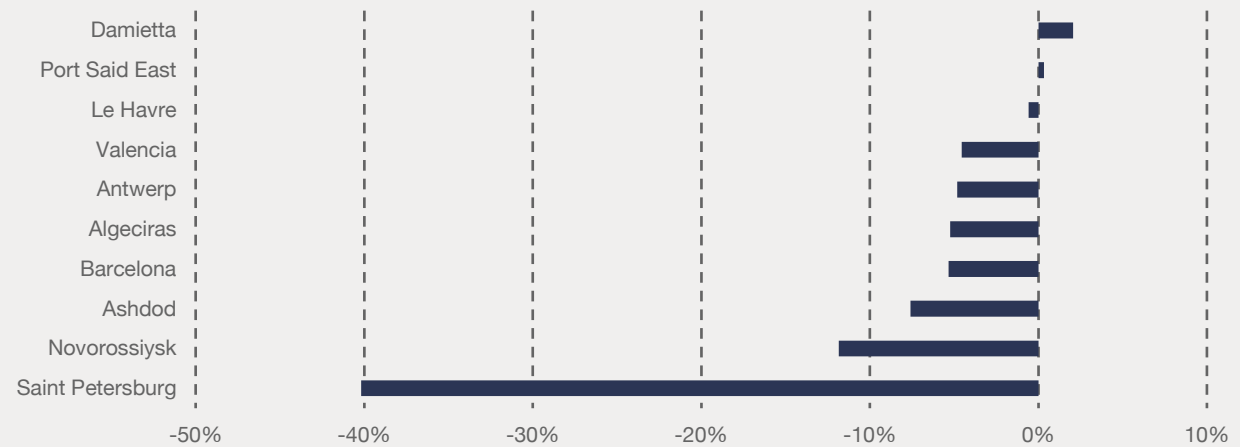
Figure 5.1 Drewry Europe Container Port Throughput Index



Source: Drewry Maritime Research

Drewry Europe Container Port Throughput Index

Figure 5.2 Europe - growth decline in throughput, April 2022 vs April 2021 for selected ports



Source: Drewry Maritime Research

Drewry Europe Container Port Call Indices

European Container Port Call Index down 9% YoY

The Europe Container Port Call Indices showed a MoM improvement in May 2022. The vessel call index rose 3.7% and the vessel capacity index was up by 2.4%.

The YoY figures continue to demonstrate the shift in the European market, with mainline service coverage falling at the main ports. The vessel call index was down 8.9% YoY and the vessel capacity index dropped by 9.7% YoY in May 2022. While the vessel call index has been below 100 points since November 2021, the average vessel size fell 4.1% from 4,380 teu in May 2021 to 4,340 teu in May 2022.

Rationalisation of port coverage across the major Northwest European hubs is evident – monthly call volumes fell 17.7% YoY at Rotterdam, -14% at Bremerhaven, -13.9% at Antwerp and -6.3% at Hamburg.

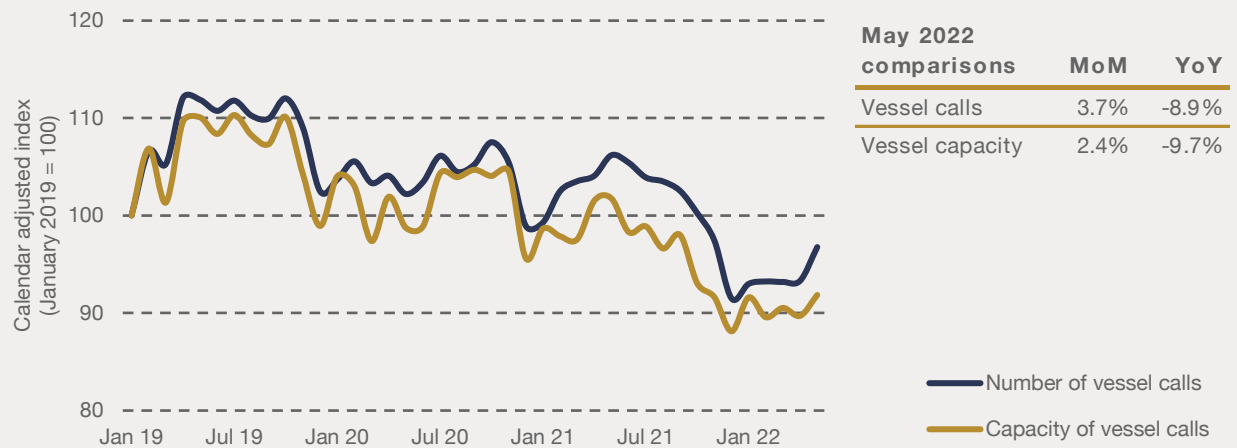
Vessel calls at Valencia are up 12% MoM, which should support continued increase in port handling. Elsewhere in the Mediterranean, Piraeus recorded 18% MoM increase in vessel calls, and call volumes were also up at the Israeli ports of Haifa (+22.9% MoM) and Ashdod (+20.2% MoM).

Europe vessel call index down 8.9% YoY in May 2022

Monthly call volumes at Rotterdam down 18% YoY

Drewry Europe Container Port Call Indices

Figure 5.3 Drewry Europe Container Port Call Index



Source: Drewry Maritime Research

Drewry Europe Port Performance Indices

Average call duration up 16.5% YoY as streamlined schedules drive average cargo exchanges upwards

The Drewry Europe Port Performance Indices showed marginal MoM improvement in April 2022, but average call duration was up 16.5% YoY to 1.8 days. Average pre-berth waiting time was stable at 0.4 day, 86% above 2019 levels.

The Europe Port Performance Indices improved MoM in May 2022, with the index measuring total call duration falling 5.9% MoM and the index measuring total call duration for 1,000 teu vessel capacity down by 4.7% MoM.

However, total call duration remains significantly higher on an annualised basis, with the average 1.7 day call duration recorded in May 2022, 13.1% higher than the 1.5 days average call length in May 2021. Increased pre-berth waiting accounts for 46% of this increase, with increased terminal time accounting for 37%.

In May 2022 the average pre-berth waiting remained high at 0.4 day (vs. 2019 average: 0.2 day).

In Northwest Europe, Bremerhaven continued to record high levels of pre-berth waiting (0.7 day, 14% MoM increase), while waiting time at Hamburg was lower at 0.4 day but also worsened (11% MoM increase). In contrast, average waiting time fell steeply at Antwerp to 0.3 day (-32% MoM decrease) and remained stable at 0.4 day in Rotterdam (1% MoM increase).

In the West Mediterranean, average waiting time increased steeply at La Spezia to 1.3 days (78% MoM increase) and Valencia to 0.6 day (90% MoM increase), but improved at Malta (0.2 day, -54% MoM decrease).

In the Eastern Mediterranean and Black Sea markets, the ports of Koper (1.9 days, 106% MoM increase) and Poti (1.3 days, 264% MoM increase) recorded the highest average pre-berth waiting time (1.3 days, 264% MoM increase).

Average call duration rises 13% YoY to 1.7 days

Average pre-berth waiting increases to 0.7 day at Bremerhaven

Pre-berth waiting delays at Koper rises to 1.9 days

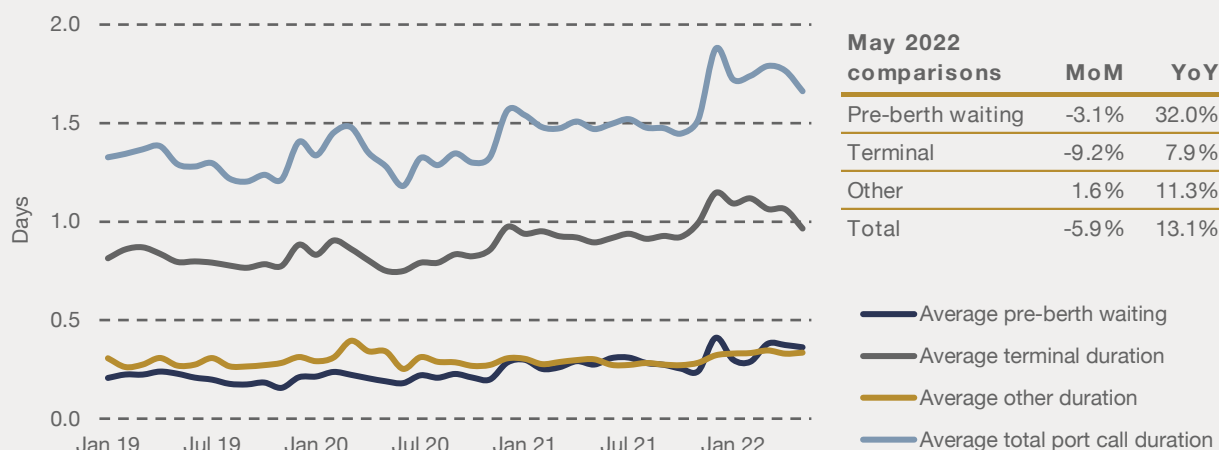
Drewry Europe Port Performance Indices

Figure 5.4 Drewry Europe Container Port Performance Index



Source: Drewry Maritime Research

Figure 5.5 Europe average container port call duration



Source: Drewry Maritime Research

The change in service coverage across the main Northwest European ports has contributed to a reduction in port productivity levels. Streamlining of mainline services has required consolidation of total port cargo volumes, resulting in higher average cargo exchanges per call.

Assessment of the four main Northwest European ports indicates a steep increase in average exchange at Antwerp and Rotterdam, where the average parcel size increased by more than 15% between 1Q19 and 1Q22.

Average cargo exchange up 21% at Antwerp between 1Q19 and 1Q22

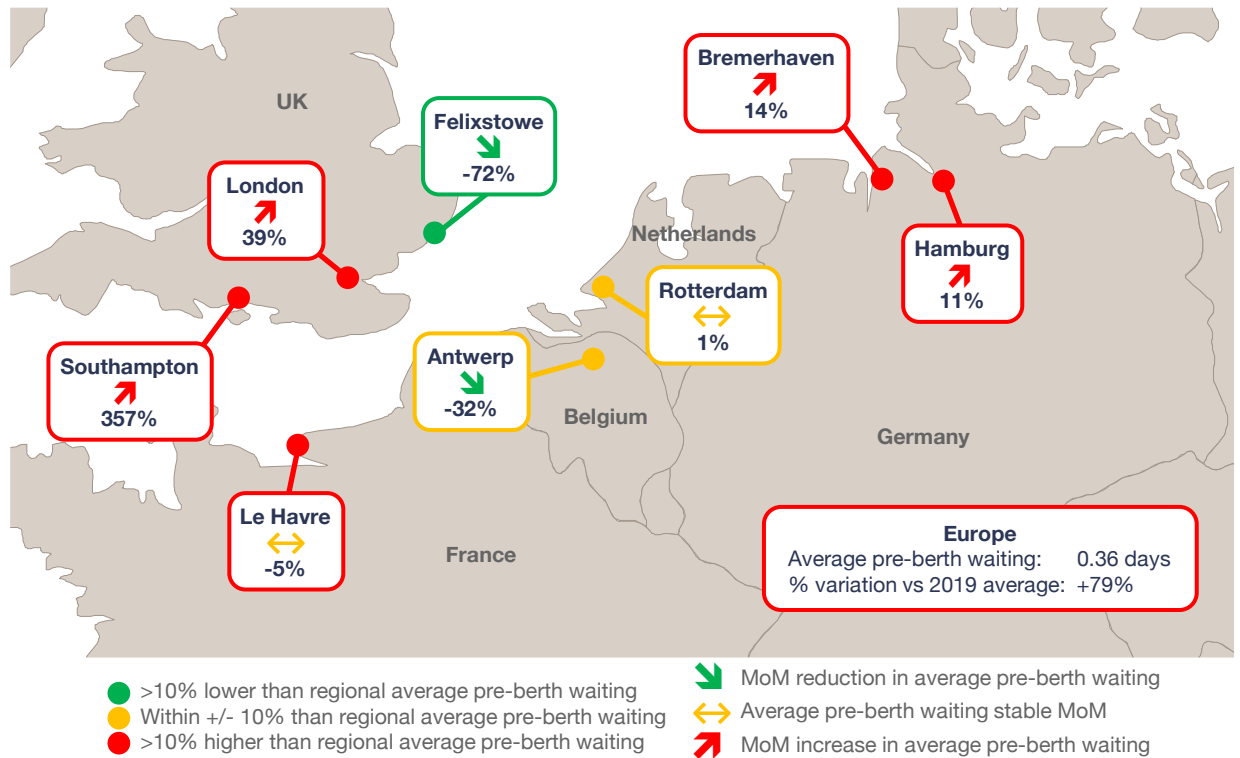
Table 5.1 Average cargo exchange per call at main North West European ports (teu)

	Antwerp	Bremerhaven	Hamburg	Rotterdam
1Q19	2,604	1,734	2,514	2,331
1Q20	2,801	1,724	2,570	2,262
1Q21	3,058	1,966	2,641	2,504
1Q22	3,142	1,951	2,613	2,709
1Q22 vs 1Q19	21%	12%	4%	16%

Source: Drewry Maritime Research

Drewry Europe Port Performance Indices

Figure 5.6 North West Europe, pre-berth waiting time, May 2022



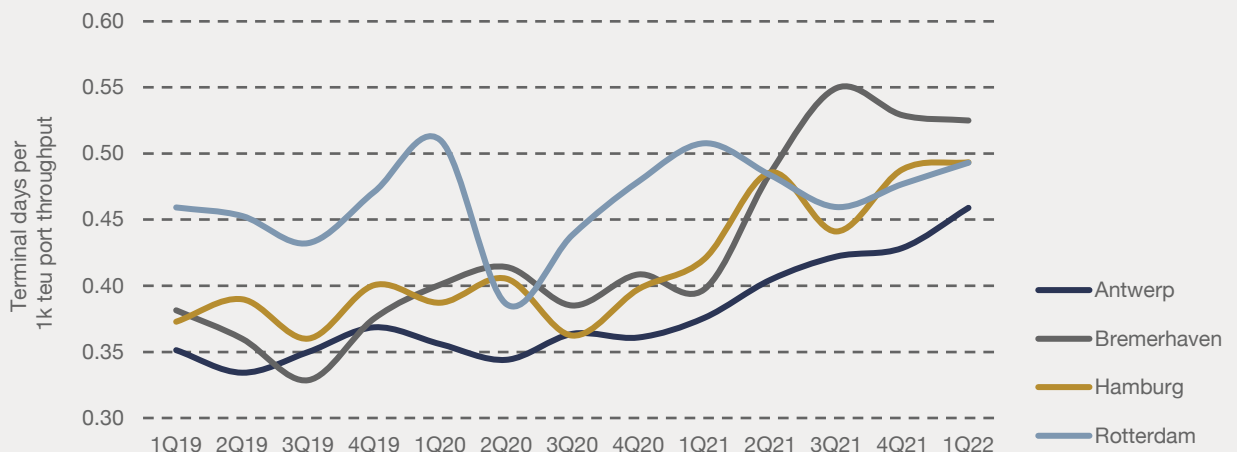
Source: Drewry Maritime Research

Larger parcel sizes result in higher peak storage requirements within terminal yards, and are assessed to be a major causation factor of the port congestion that is plaguing European ports. Higher peaking factors can result in terminal yards becoming overfull, and this has a negative impact on terminal productivity.

The average time vessels spend at berth per 1,000 teu of port throughput has increased by over 30% at Antwerp, Bremerhaven and Hamburg, from between 0.35-0.38 day per 1,000 teu in 1Q19 to between 0.46-0.53 day per 1,000 teu in 1Q22.

Terminal time per 1,000 teu port throughput has increased by more than 30% in Antwerp, Bremerhaven and Hamburg

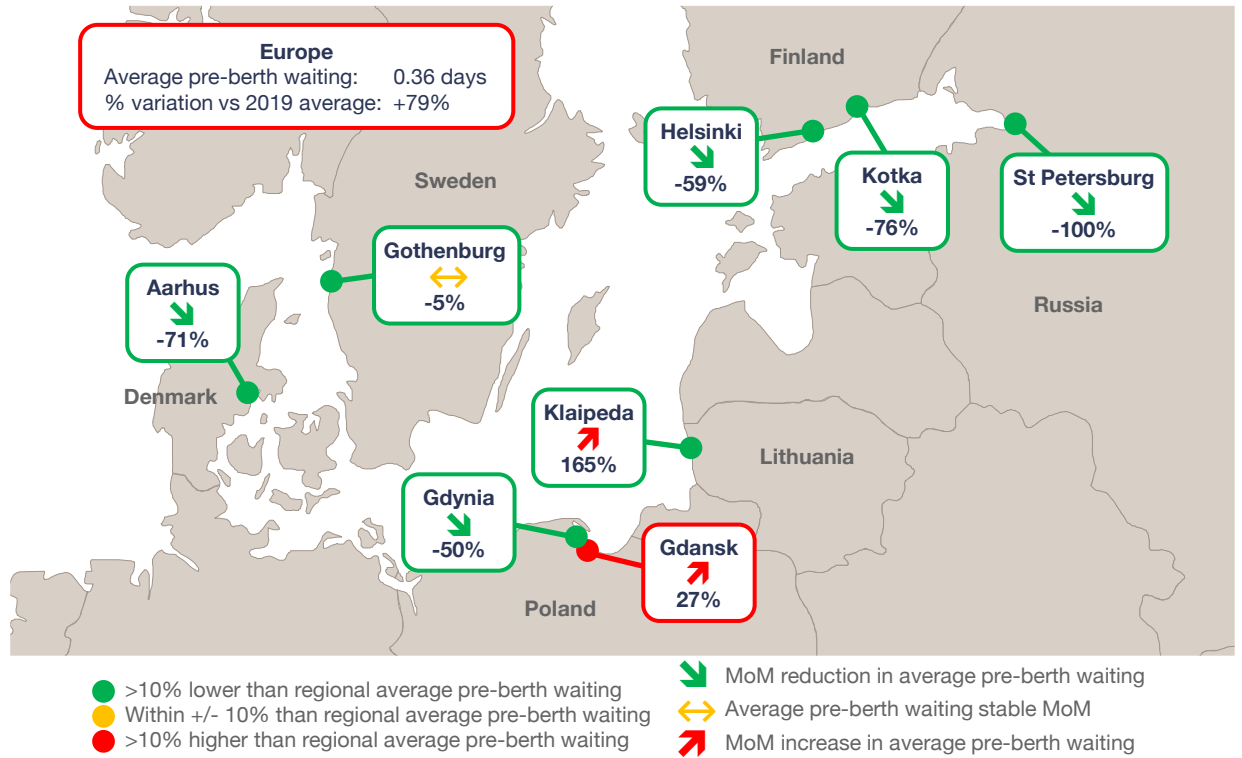
Figure 5.7 Port productivity falls at main North West European ports



Source: Drewry Maritime Research

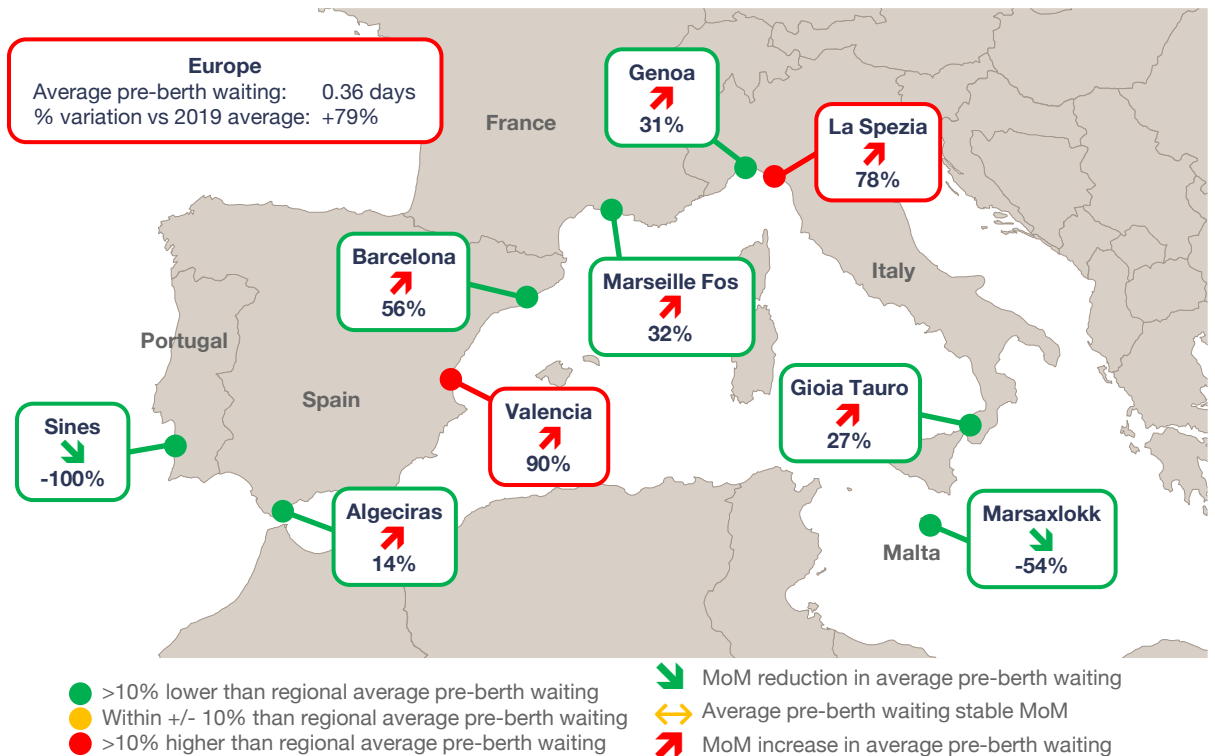
Drewry Europe Port Performance Indices

Figure 5.8 Scandinavia & Baltic, pre-berth waiting time, May 2022



Source: Drewry Maritime Research

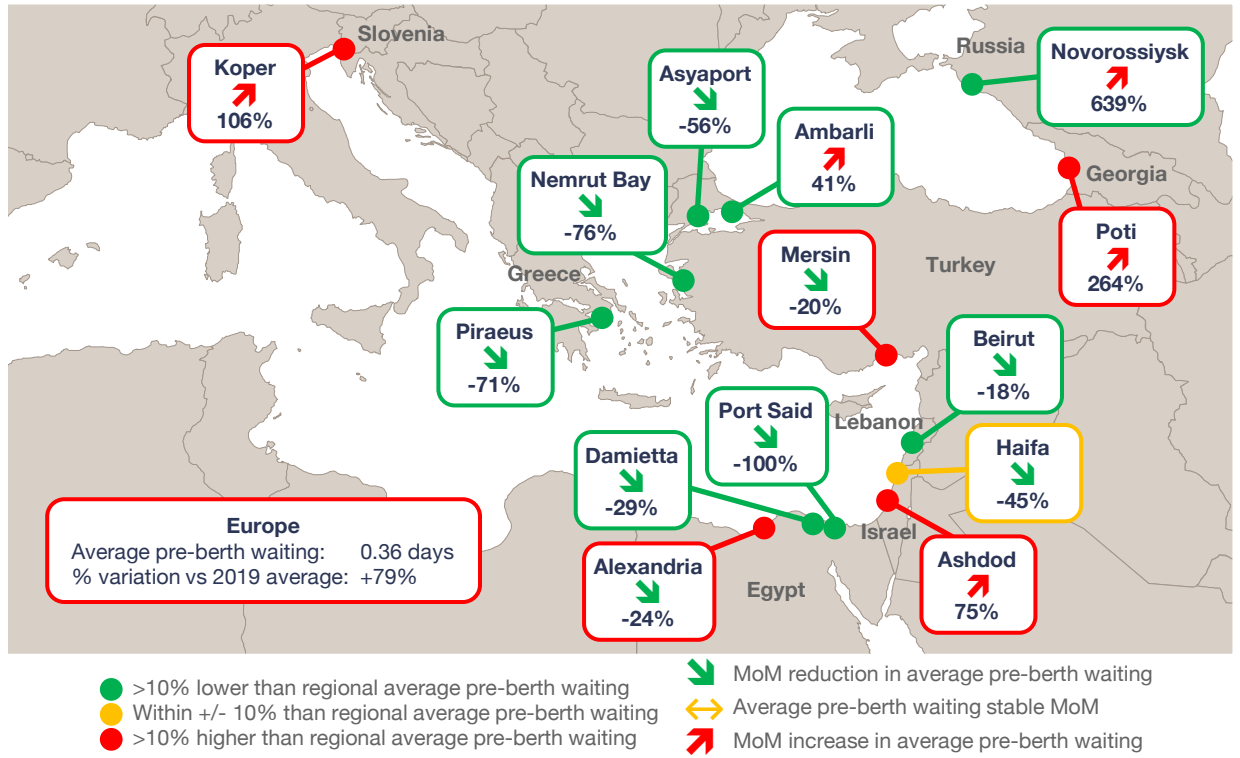
Figure 5.9 West Mediterranean, pre-berth waiting time, May 2022



Source: Drewry Maritime Research

Drewry Europe Port Performance Indices

Figure 5.10 East Mediterranean & Black Sea, pre-berth waiting time, May 2022



Source: Drewry Maritime Research

Middle East & South Asia ports monitor

 Throughput -0.4% YoY Stable	 Port calls +0.9% YoY Stable	 Waiting +3.2% MoM Negative	 Terminal Time -12.8% MoM Positive
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Drewry Middle East & South Asia Container Port Throughput Index

Index stabilises in April 2022

The Middle East and South Asia Container Port Throughput Index was stable in April 2022. In India, Chennai is losing market share to Ennore and Kattupali.

The Middle East and South Asia Container Port Throughput Index was stable MoM and YoY in April 2022.

In South Asia, Jawaharlal Nehru port throughput was up 6% YoY to 0.5 mteu in April 2022, while traffic at Mundra increased by 1% YoY to 0.55 mteu. On the East Coast, volumes at Chennai fell 19% YoY to 0.11 mteu in April 2022, losing market share to Ennore, where volumes were up +45% YoY, and Kattupali, which recorded 41% YoY traffic increase.

Dammam reported 15% YoY increase in container handling in April 2022, with volumes reaching 0.15 mteu, however volumes were down by 15% to 0.36 mteu in Jeddah.

Middle East and South Asia Container Port Throughput Index stable in April 2022

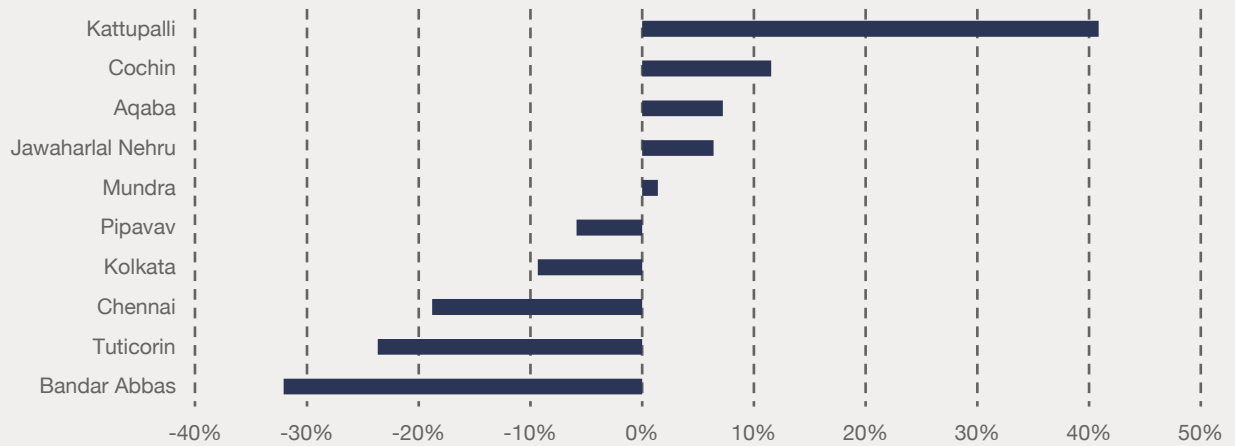
Figure 6.1 Drewry Middle East & South Asia Container Port Throughput Index



Source: Drewry Maritime Research

Drewry Middle East & South Asia Container Port Throughput Index

Figure 6.2 Middle East & South Asia - growth decline in throughput, April 2022 vs April 2021 for selected ports



Source: Drewry Maritime Research

Drewry Middle East & South Asia Container Port Call Indices

Vessel call index drops 2.2% in May 2022

The Middle East & South Asia Container Port Call Indices recorded 2.2% MoM decline in port calls in May 2022, but 2.0% MoM increase in vessel capacity.

The vessel call index was up 0.9% YoY, while vessel capacity index was 4.7% lower over the same period. The average vessel size fell 5.6% from 5,270 teu in May 2021 to 4,980 teu in May 2022.

Mundra recorded the highest MoM increase in calls, handling 21% more calls in May 2022 than in April 2022. Call volumes at the port were also up 10% YoY. In contrast, Jawaharlal Nehru call volumes were stable MoM, but increased 32% YoY, reflecting the spate of new services introduced in the past year in response to the Indian export boom.

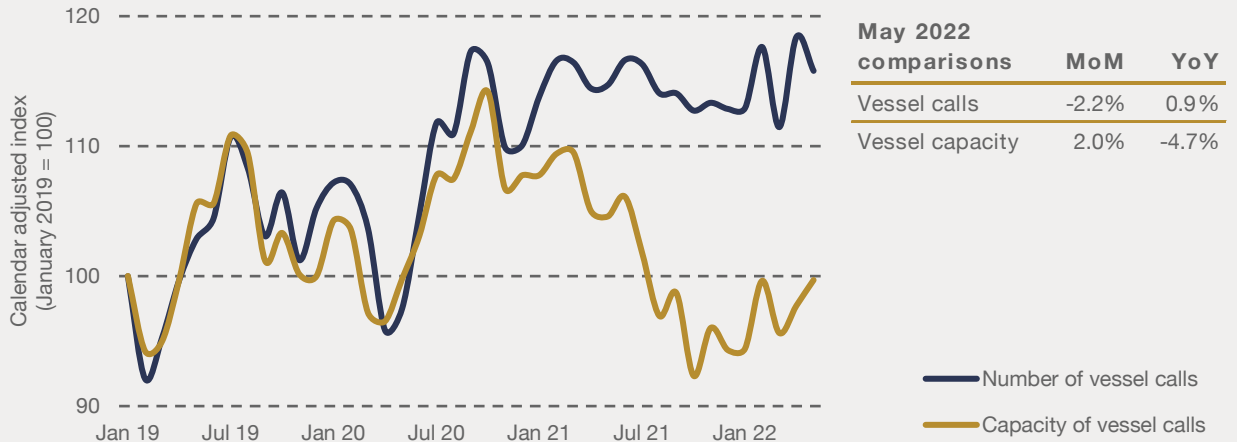
In the Middle East, Jebel Ali recorded a 3% MoM reduction in call volume, but total vessel capacity was up 1%. Khalifa Port recorded improved results, with call volumes up 13% MoM and 8% YoY.

Middle East and South Asia Port Call Index drops 2% MoM in May 2022

Jawaharlal Nehru call volumes up 32% YoY

Drewry Middle East & South Asia Container Port Call Indices

Figure 6.3 Drewry Middle East & South Asia Container Port Call Index



Source: Drewry Maritime Research

Drewry Middle East & South Asia Port Performance Indices

Terminal time savings offset increase in average waiting time

The Middle East and South Asia Port Performance Index, which measures average call duration, recorded a 4.4% MoM decrease in May 2022 (-8.3% per 1,000 teu vessel capacity), led by a 12.8% MoM reduction in average terminal time to 0.9 day. The savings in terminal time were sufficient to offset the 3.2% MoM increase in average pre-berth waiting time, which increased to 0.45 day in May 2022.

Average call duration dropped 4% MoM in May 2022

On an annualised basis, the average total call duration is 9% higher at 1.7 days (vs. 1.6 days in May 2021), with increased waiting time accounting for more than two-thirds of this increase.

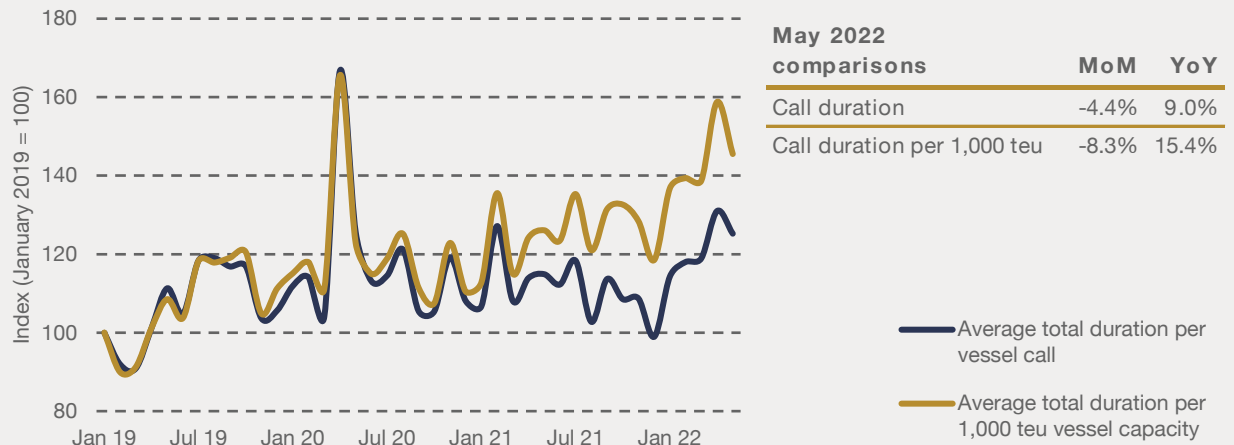
Congestion worsened in Chittagong, with average pre-berth waiting time increasing 56% MoM to 4.3 days due to suspension of most trucking movements during the Eid festival, which resulted in severe yard congestion.

Pre-berth waiting time rose 56% in Chittagong due to the Eid festival

Congestion was reduced at the main Middle East and South Asian hub ports in May 2022. Average pre-berth waiting time fell at Jebel Ali (0.2 day, -50% MoM reduction) and Colombo (0.3 day, -32% MoM reduction) and remained low at Salalah (0.1 day), Jeddah (0.1 day) and King Abdullah (0.0 day).

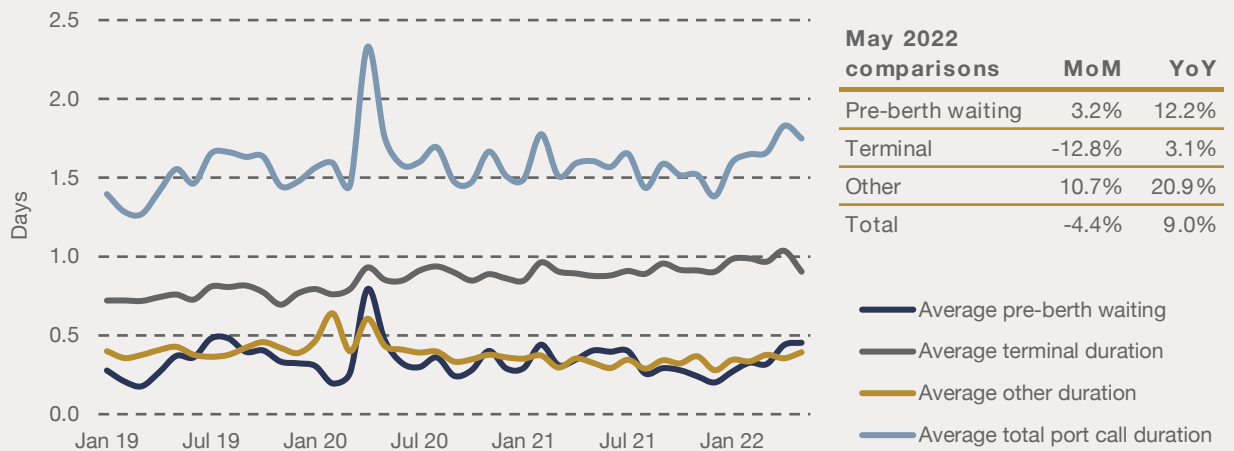
Drewry Middle East & South Asia Port Performance Indices

Figure 6.4 Drewry Middle East & South Asia Port Container Port Performance Index



Source: Drewry Maritime Research

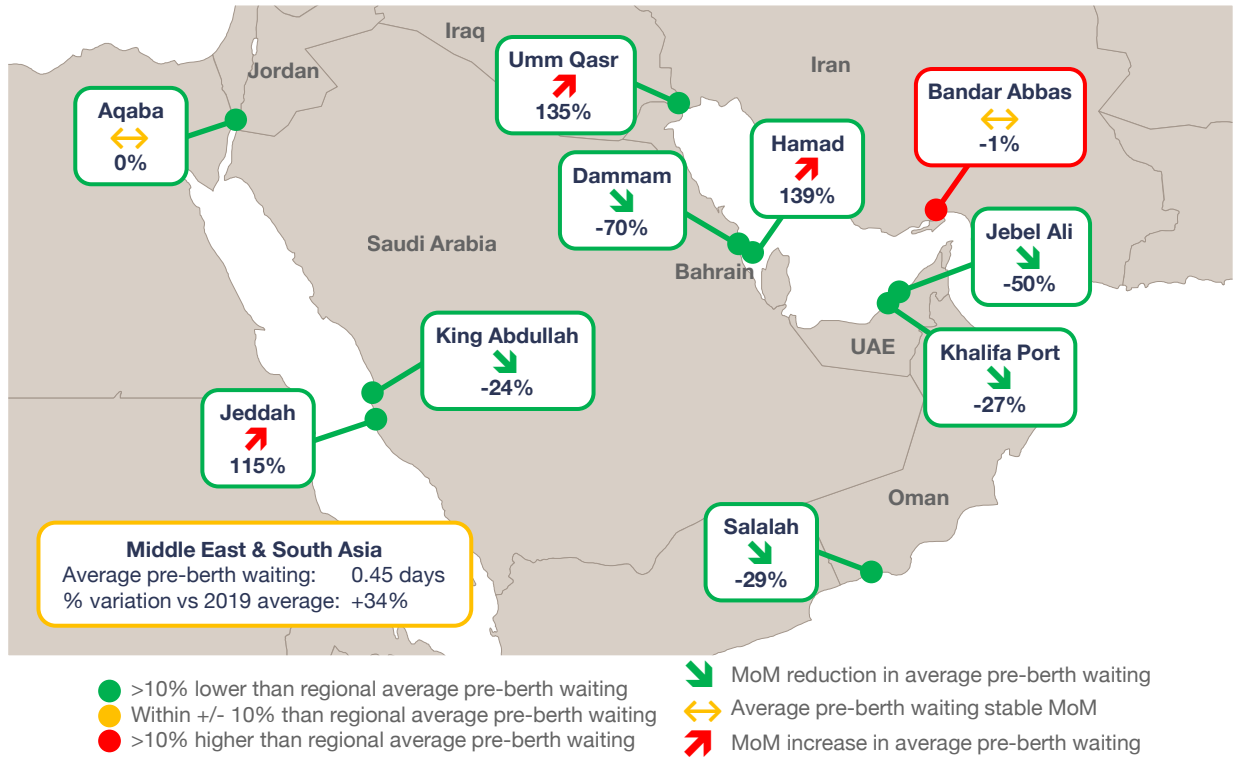
Figure 6.5 Middle East & South Asia average container port call duration



Source: Drewry Maritime Research

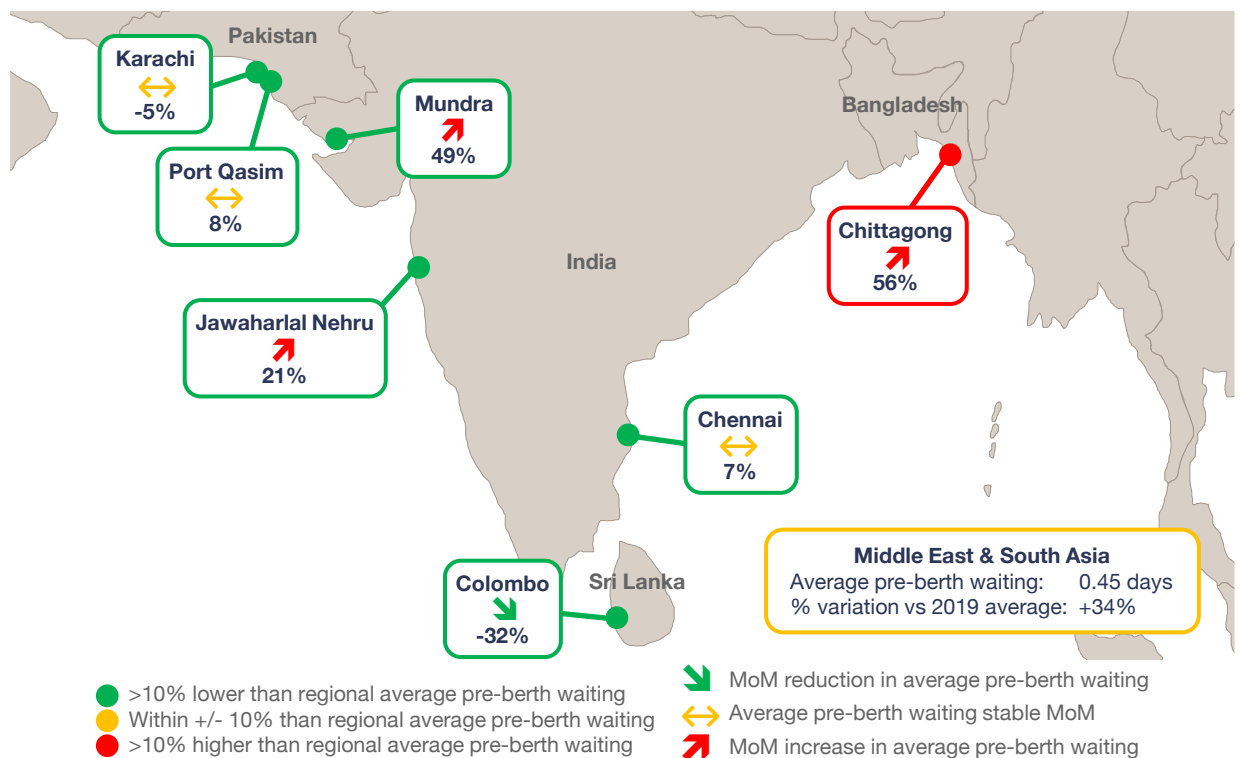
Drewry Middle East & South Asia Port Performance Indices

Figure 6.6 Middle East, pre-berth waiting time, May 2022



Source: Drewry Maritime Research

Figure 6.7 South Asia, pre-berth waiting time, May 2022



Source: Drewry Maritime Research

Latin America ports monitor

 Throughput -1.5% YoY Negative	 Port calls +1.4% YoY Positive	 Waiting +57.4% MoM Negative	 Terminal Time +3.1% MoM Negative
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Drewry Latin America Container Port Throughput Index

Santos volumes up 9% YoY in April 2022

Latin American Container Port Throughput Index was up by just 0.7% MoM, but fell 1.5% YoY. Brazilian ports showed more resilience, with volumes at Santos up 9% YoY.

The Latin America Container Port Throughput Index remained broadly stable in April 2022, up by just 0.7% MoM. Without the impact of the calendar adjustment, the underlying growth in port throughput was an MoM fall of 2.6%.

The index fell 1.5% on an annual basis, led by a 10% YoY drop in handling at Panama’s Pacific coast hub ports in Balboa and Rodman

In Brazil, volumes at the largest regional port Santos were up 9% YoY to 415,000 teu; and Rio de Janeiro posted another strong performance, with throughput up 43% YoY to over 55,000 teu.

Latin American Container Port Throughput Index down 1.5% YoY

Santos volumes up 9% YoY to 415,000 teu

Figure 7.1 Drewry Latin America Container Port Throughput Index

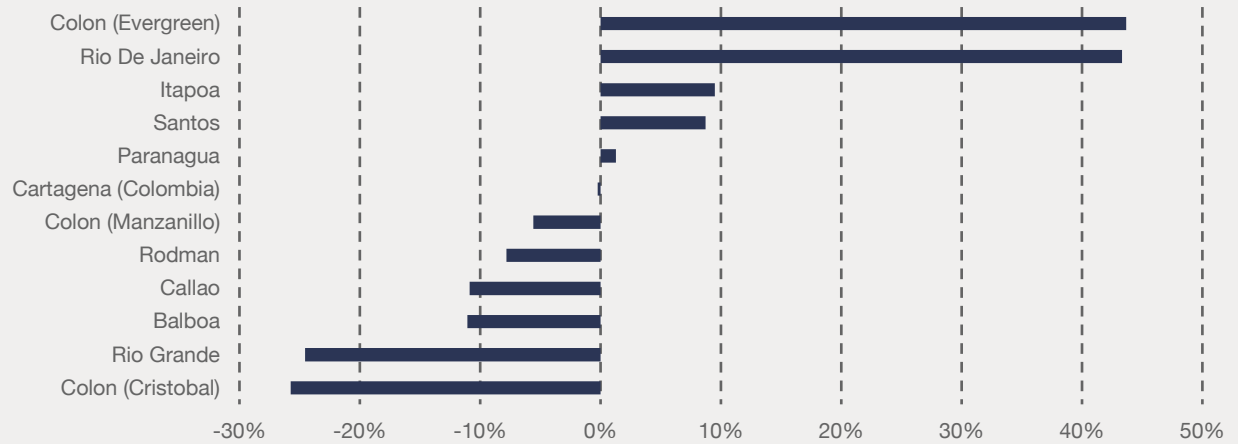


April 2022 comparisons	MoM	YoY
Port throughput	0.7%	-1.5%

Source: Drewry Maritime Research

Drewry Latin America Container Port Throughput Index

Figure 7.2 Latin America - growth decline in throughput, April 2022 vs April 2021 for selected ports



Source: Drewry Maritime Research

Drewry Latin America Container Port Call Indices

Colon terminals handle more than 50 additional calls in May 2022

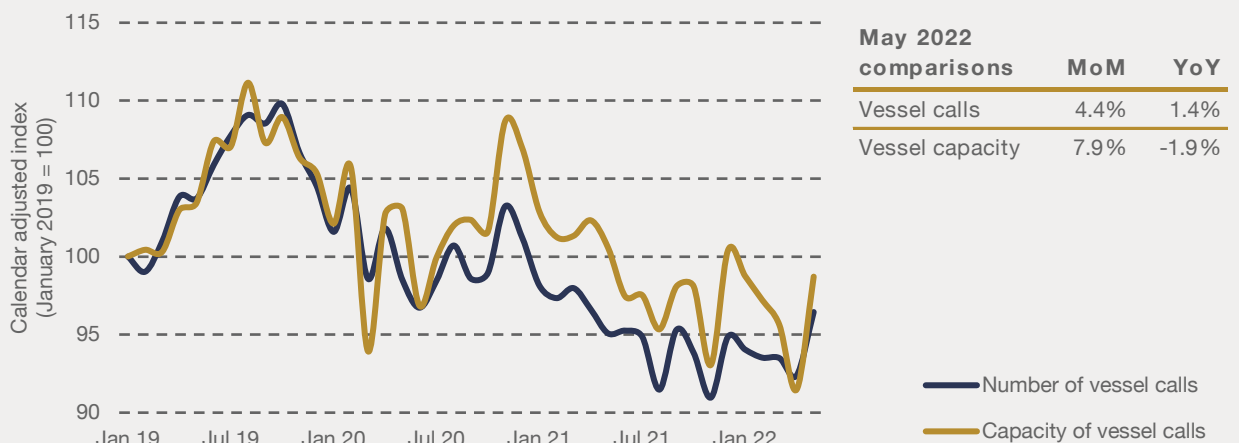
The Latin America Container Port Call indices moved upwards in May 2022, with the index based on vessel calls up 4.4% MoM and the index based on vessel capacity up 7.9% MoM. The vessel call index was also up 1.4% YoY, but vessel capacity index was down 1.9% over the same period. The average vessel size fell 3.2% from 5,120 teu in May 2021 to 4,950 teu in May 2022.

The strongest MoM gain in vessel activity has been recorded at the Panamanian port of Colon, where the three terminals handled more than 50 additional vessel calls in May 2022 compared to April 2022. Callao (Peru) and Paranagua (Brazil) also recorded strong MoM gains in both calls and capacity.

Latin American port call index up 4.4% MoM in May 2022

Central America and Caribbean port sample recorded 1% YoY growth in port calls

Figure 7.3 Drewry Latin America Container Port Call Index



Source: Drewry Maritime Research

Drewry Latin America Port Performance Indices

Pre-berth waiting time drops 32% YoY to 0.2 day

The Latin America Port Performance Index worsened on an MoM basis in May 2022, with the average call duration index up by 12.4% and call duration per 1,000 teu vessel capacity up 8.7%. Average call duration across the regional sample ports increased to 1.4 days (vs. 1.2 days in April 2022), with 70% of the increase due to longer average pre-berth waiting, which increased 57% MoM to 0.3 day.

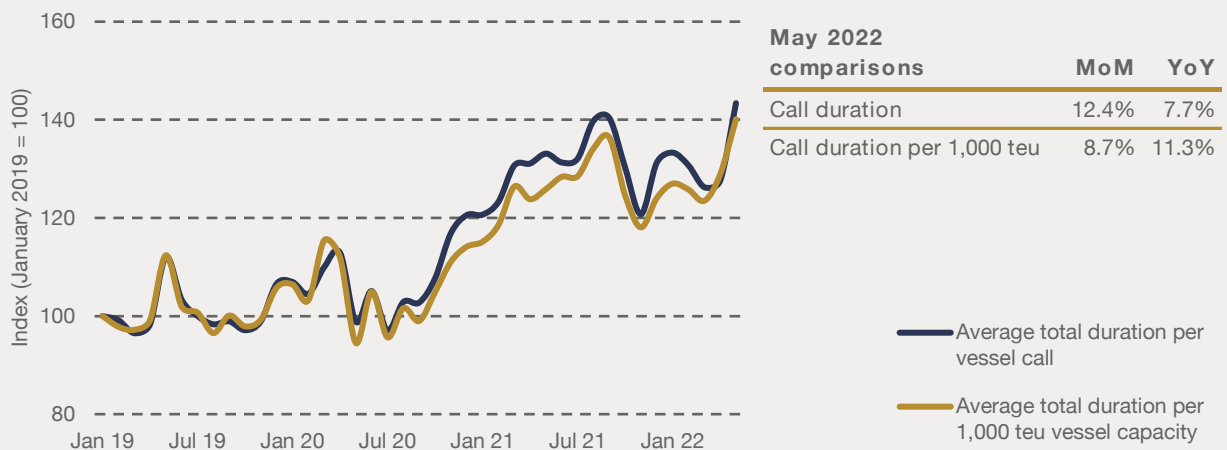
Pre-berth waiting delays rose across the main ECSA ports. The largest increases were recorded in Montevideo, where pre-berth waiting soared from 0.5 day in April 2022 to 1.5 days in May 2022, and Itajai, where average pre-berth waiting climbed to 1.3 days from 0.4 day in the preceding month. Waiting also increased at Buenos Aires (up 23% MoM to 0.9 day) and Santos (up 49% MoM to 0.4 day).

Average pre-berth waiting also increased at most Panamanian hubs in May 2022 – increasing 393% to 0.3 day at Colon (Cristobal), 62% MoM to 0.4 day at Rodman, and 255% MoM to 0.5 day at Colon (Evergreen). This can be largely explained by the increases in number of vessel calls at these terminals in May 2022. Waiting time remained below the regional average at Manzanillo (0.2 day) and also at the other main Caribbean hub ports – 0.2 day at Kingston, 0.1 day at Cartagena and Caucedo, and 0.0 day at Freeport.

Pre-berth waiting increases 57% MoM to 0.3 day

Waiting delays increase at Montevideo, Itajai and Buenos Aires

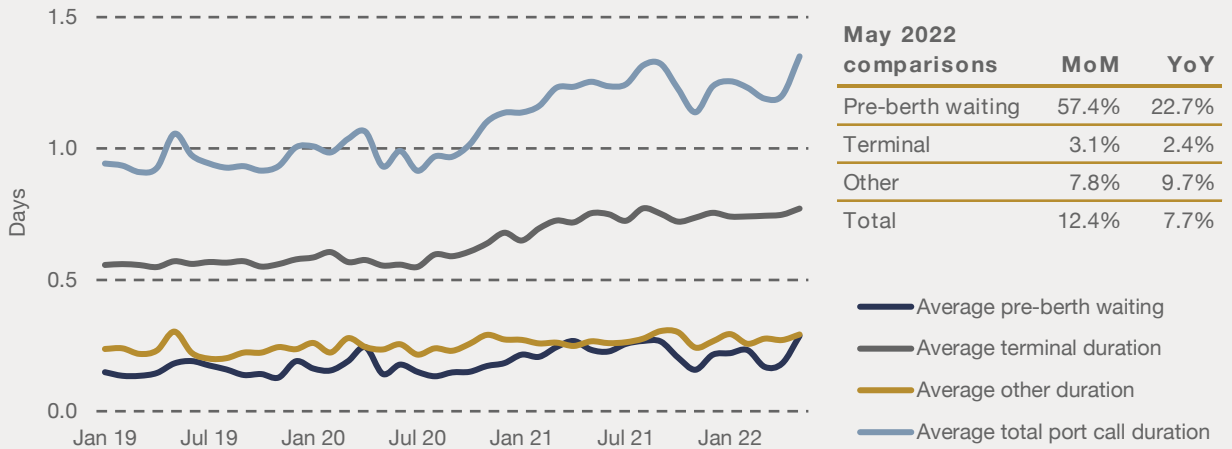
Figure 7.4 Drewry Latin America Container Port Performance Index



Source: Drewry Maritime Research

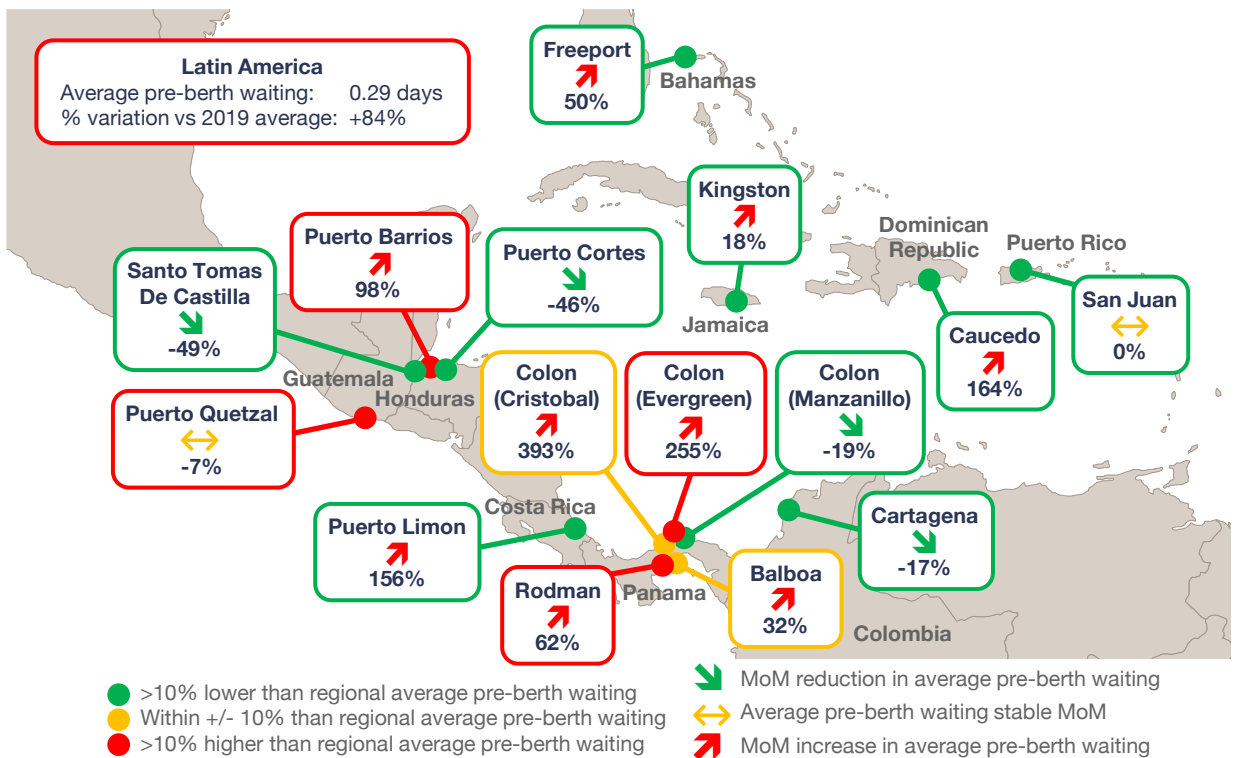
Drewry Latin America Port Performance Indices

Figure 7.5 Latin America average container port call duration



Source: Drewry Maritime Research

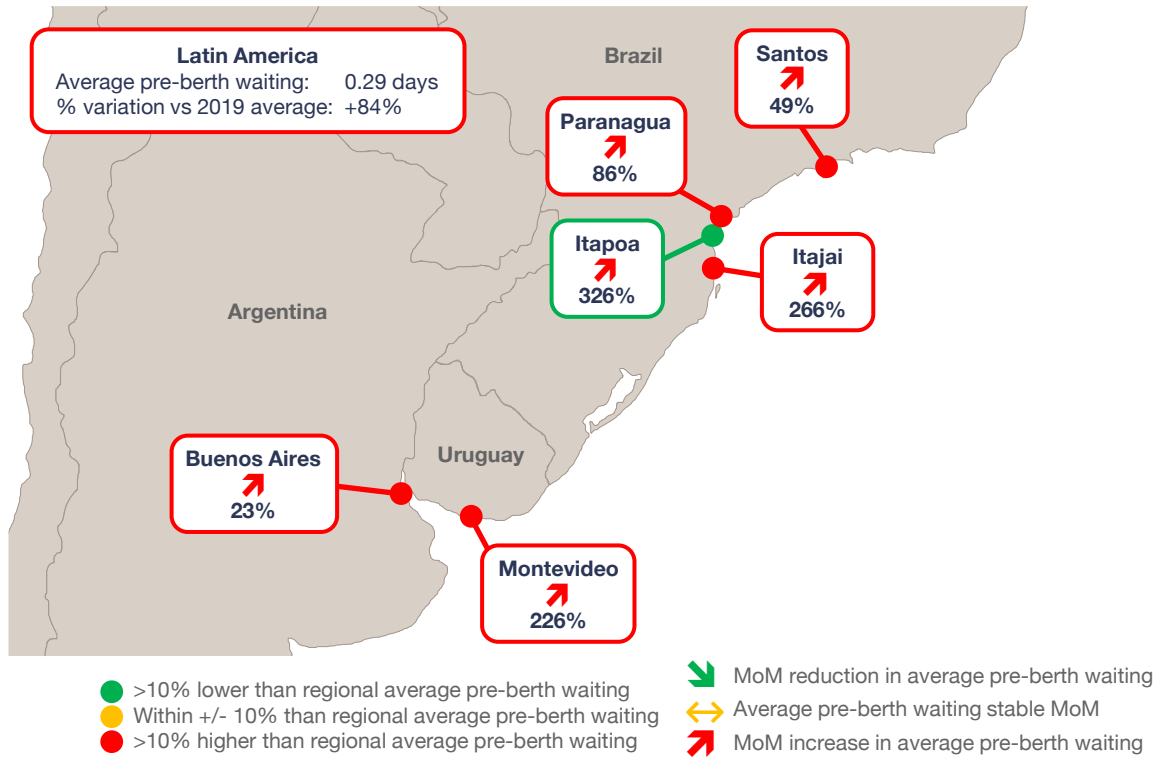
Figure 7.6 Central America/Caribbean, pre-berth waiting time, May 2022



Source: Drewry Maritime Research

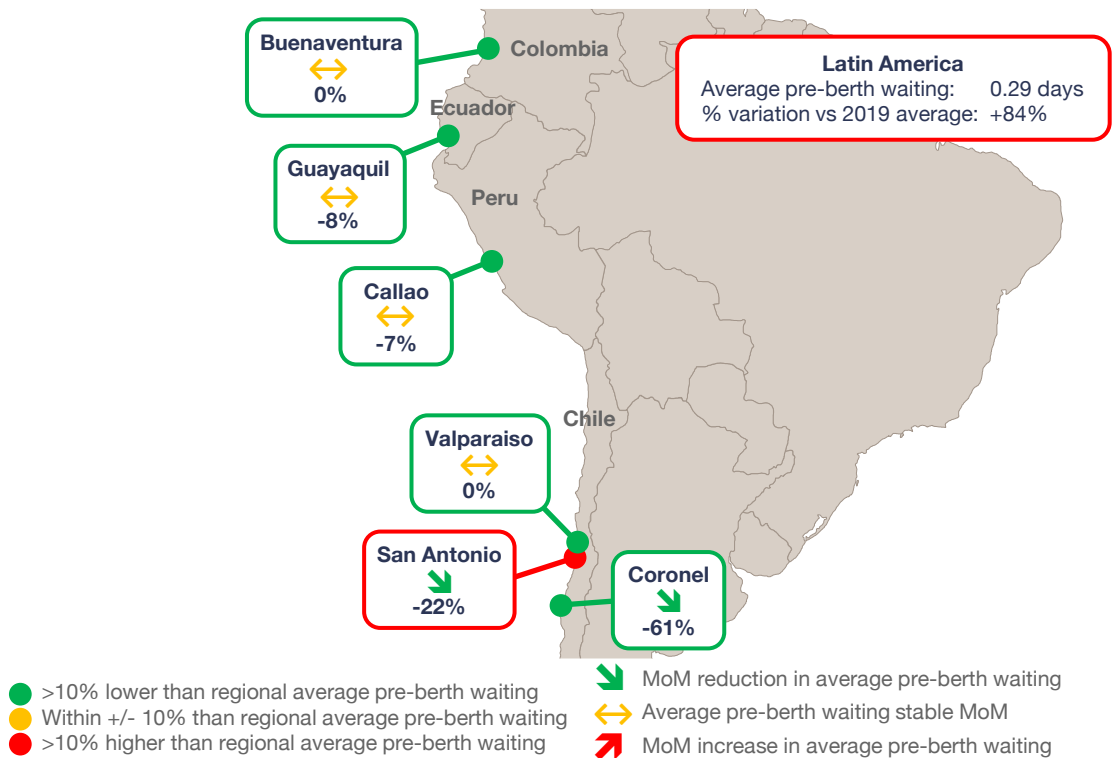
Drewry Latin America Port Performance Indices

Figure 7.7 East Coast South America, pre-berth waiting time, May 2022



Source: Drewry Maritime Research

Figure 7.8 West Coast South America, pre-berth waiting time, May 2022



Source: Drewry Maritime Research

Oceania ports monitor

 Throughput +0.5% YoY Stable	 Port calls +2.2% YoY Positive	 Waiting -28.2% MoM Positive	 Terminal Time +2.3% MoM Negative
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Drewry Oceania Container Port Throughput Index

Australian port volumes drop in March 2022

The Oceania Container Port Throughput Index fell 9.1% MoM and 4.2% YoY in March 2022. Port of Melbourne reported 11% YoY fall in laden exports.

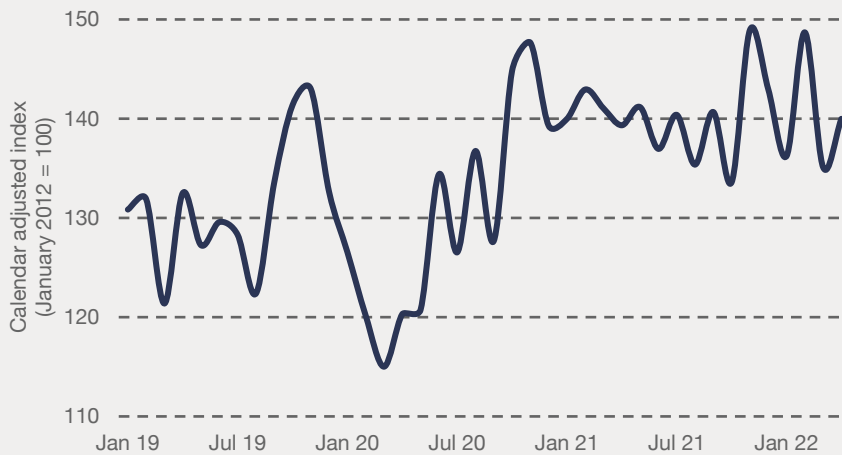
The Oceania Port Throughput Index was up 3.6% MoM in April 2022, recovering some of the ground lost in March. On an annualised basis the index was broadly stable, up by just 0.5%.

Melbourne traffic fell back 6% (16,000 teu) between March and April 2022, but this was almost entirely offset by the 7% (15,000 teu) increase in Sydney’s container traffic.

Tauranga posted a 5% MoM gain, and traffic levels are up 19% YoY.

**Oceania Container
Port Throughput Index
up 3.6% MoM in April
2022**

Figure 8.1 Oceania Container Port Throughput Index

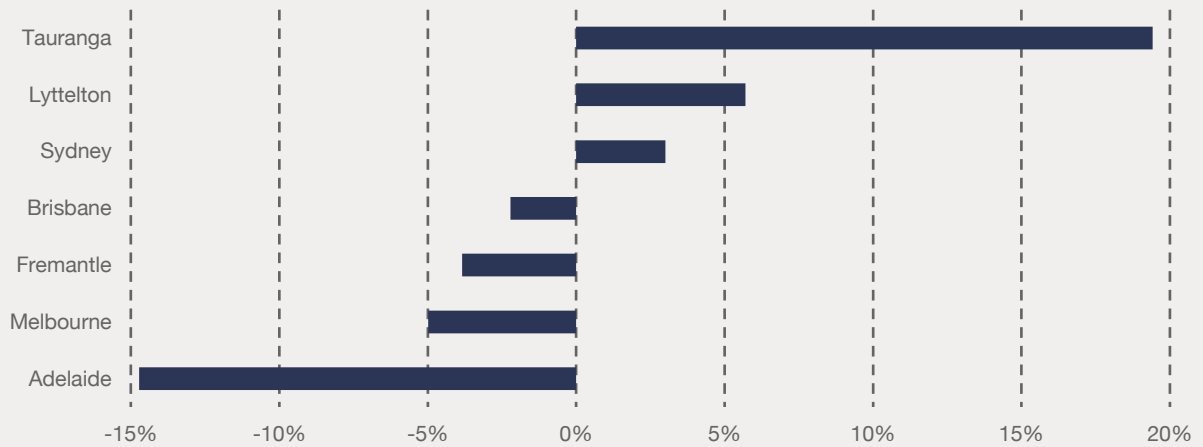


April 2022 comparisons	MoM	YoY
Port throughput	3.6%	0.5%

Source: Drewry Maritime Research

Drewry Oceania Container Port Throughput Index

Figure 8.2 Oceania - growth/decline in throughput, April 2022 vs April 2021 for selected ports



Source: Drewry Maritime Research

Drewry Oceania Container Port Call Indices

Total vessel calls up 2% YoY, but average vessel size falls 8% to 4,160 teu

The Oceania Container Port Call Indices stabilised in May 2022, with total calls down 2.2% and total capacity up 0.4%. On an annualised basis total vessel calls was up 2.2%, while total vessel capacity has dropped by 6.1%. Average vessel size fell 8.1% from 4,530 teu in May 2021 to 4,160 teu in May 2022.

Vessel calls at both Brisbane and Melbourne increased from 77 monthly calls in April 2022 to 80 monthly calls in May 2022. However, call volumes at Sydney dropped back 7% from 98 calls in April 2022 to 91 calls in May 2022. Average vessel size in Sydney has dropped 13% YoY from 4,990 teu to 4,370 teu.

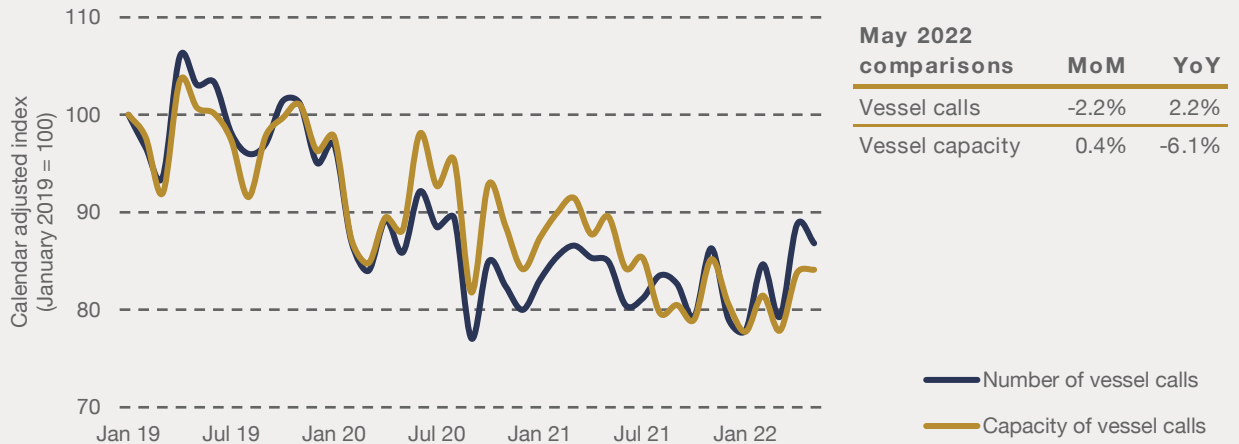
Vessel calls at the main New Zealand ports dropped back in May 2022, with Auckland call numbers dropping back 7% to 28 calls and Tauranga calls down 9% to 53 calls.

Total vessel calls down 2% MoM in May 2022

Call numbers at Brisbane and Melbourne move upwards

Drewry Oceania Container Port Call Indices

Figure 8.3 Drewry Oceania Container Port Call Index



Source: Drewry Maritime Research

Drewry Oceania Port Performance Indices

Strong improvement in port performance as waiting time and terminal time fall

The Oceania Port Performance Index deteriorated MoM in May 2022, with average call duration index increasing 14.1% (11.2% per 1,000 teu vessel capacity).

The increase in average call duration from 1.9 days in April 2022 to 2.2 days in May 2022 was mainly due to a 0.3 day (123%) increase in other port time (i.e. waiting incurred after the initial terminal call). Average pre-berth waiting time dropped back to 0.2 day in May 2022 (vs. 0.3 day in April 2022) and average terminal time remained stable at 1.4 days.

Drewry's assessment is that because schedule integrity in this market is now so poor and port performance in both major New Zealand ports has been unreliable, carriers have selected to wait after completing operations in Australia rather than incurring pre-berth waiting in New Zealand.

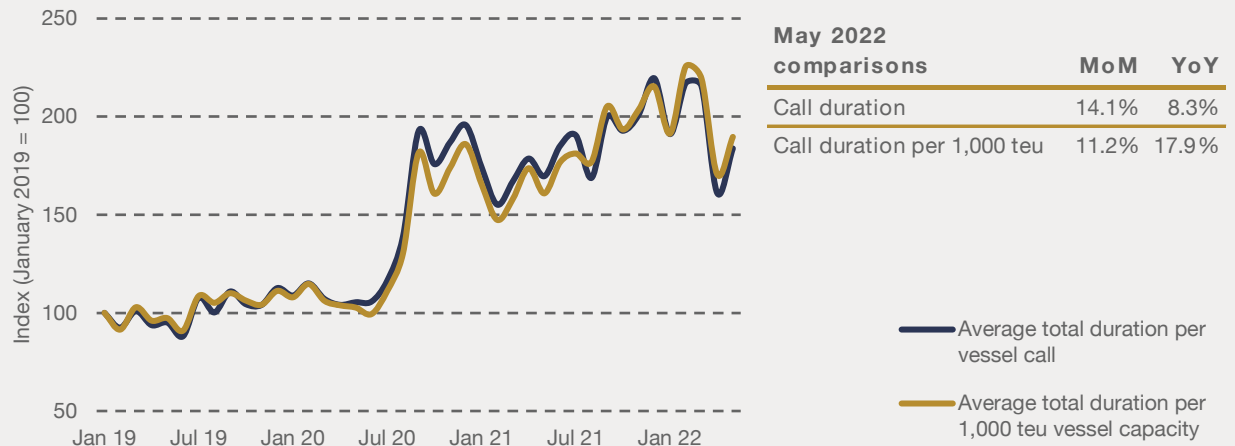
At a port level, average pre-berth waiting time at Auckland dropped by 75% MoM to 0.3 day (April 2022: 1.1 days), while in Tauranga it increased 44% MoM to 0.7 day (April 2022: 0.5 days). Performance issues at Auckland, together with the imposition of congestion surcharges, have contributed to the decision by the port to abandon the partially implemented port automation project. During the worst of the delays, shippers had diverted cargo to Tauranga, but this port has faced worsening rail delays, which in turn have resulted in yard congestion with a knock-on effect on berth waiting time.

Strong improvement as average port call duration drops 23% MoM

Waiting time remains high at Auckland and Tauranga

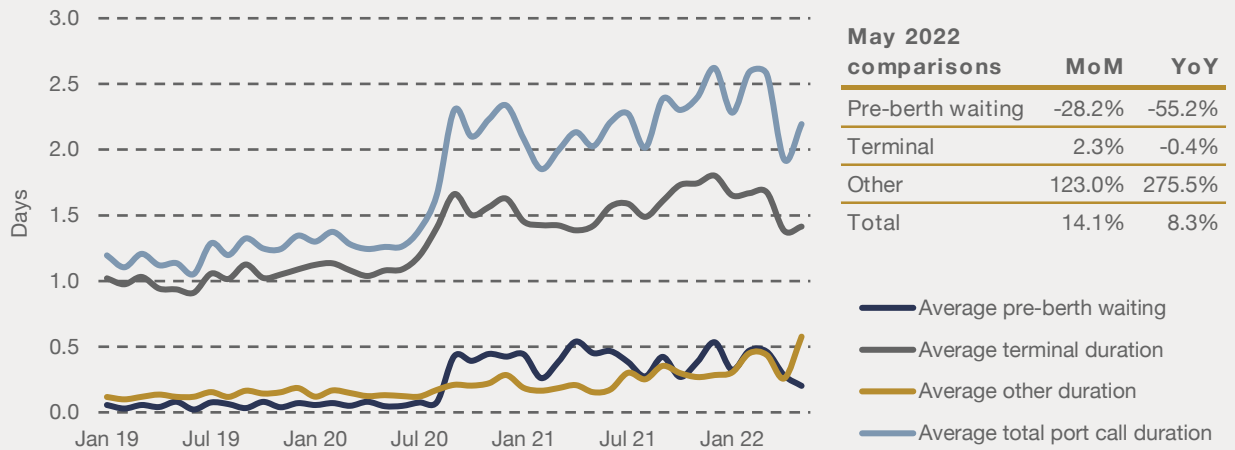
Drewry Oceania Port Performance Indices

Figure 8.4 Drewry Oceania Container Port Performance Index



Source: Drewry Maritime Research

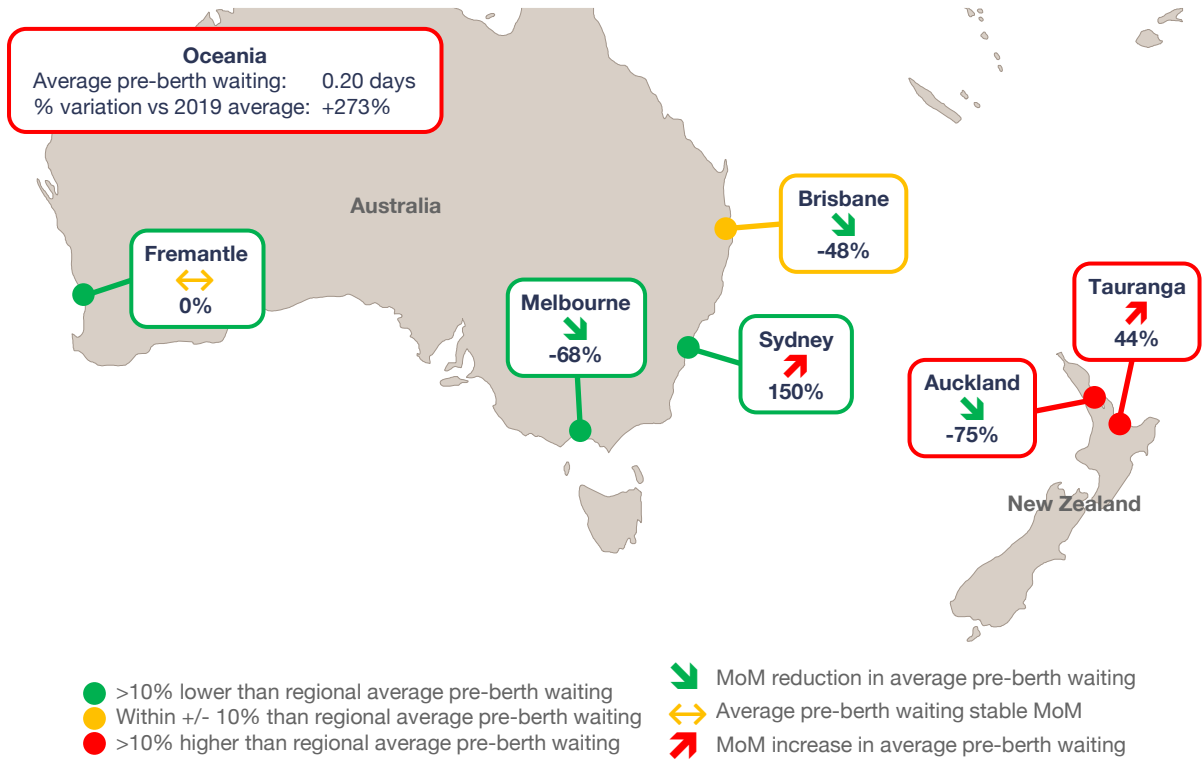
Figure 8.5 Oceania average container port call duration



Source: Drewry Maritime Research

Drewry Oceania Port Performance Indices

Figure 8.6 Oceania, pre-berth waiting time, May 2022



Source: Drewry Maritime Research

Africa ports monitor

 Throughput -15.2% YoY Negative	 Port calls -4.2% YoY Negative	 Waiting -26.6% MoM Positive	 Terminal Time -4.9% MoM Positive
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Drewry Africa Container Port Throughput Index

KwaZulu-Natal floods result in 30% lower throughput at Durban

South African port volumes remained broadly stable YoY in March, but the outlook is poor as severe floods in April 2022 impacted operations of the Port of Durban. Reduced transshipment activity at Las Palmas also contributed to the YoY reduction in the index.

The Africa Container Port Throughput Index fell 2.5% MoM and 15.2% YoY in April 2022, led by the steep drop in handling activity at Durban following the catastrophic floods in KwaZulu-Natal province.

Durban's monthly throughput in April 2022 was 0.16 mteu, down 31% (70,000 teu) from the March 2022 figure of 0.23 mteu. Some cargo was diverted to Coega, where volumes increased by almost 30,000 teu (74%) to just under 65,000 teu in April. While the port made great progress to recover operations in the wake of the floods, road and rail links have taken longer to repair. Exporters have also warned that the floods have damaged manufacturing plants and adversely impacted the start of the citrus export season.

Africa Container Port Throughput Index drops 15.2% YoY in April 2022

Durban traffic plunges 31% MoM after devastating floods

Figure 9.1 Drewry Africa Container Port Throughput Index

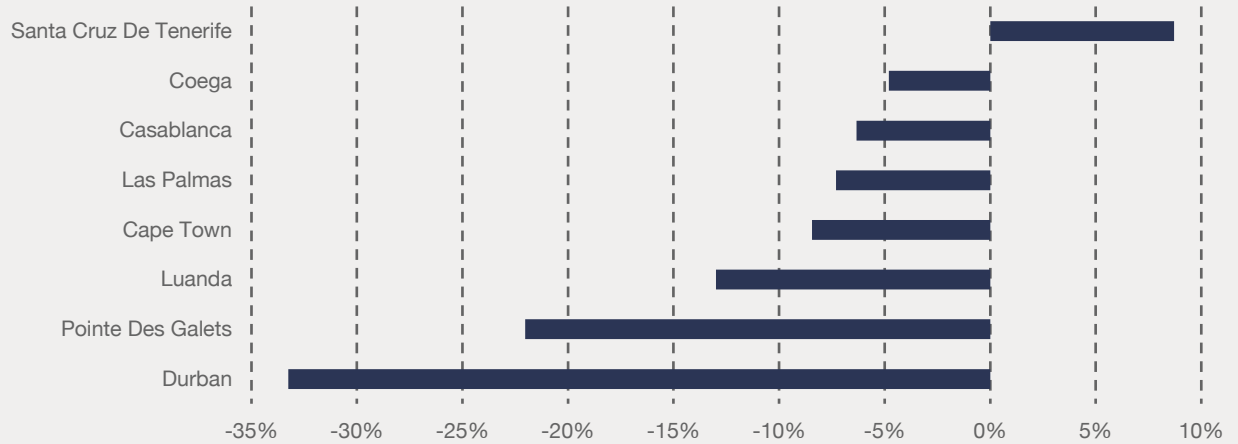


April 2022 comparisons	MoM	YoY
Port throughput	-2.5%	-15.2%

Source: Drewry Maritime Research

Drewry Africa Container Port Throughput Index

Figure 9.2 Africa - growth decline in throughput, April 2022 vs April 2021 for selected ports



Source: Drewry Maritime Research

Drewry Africa Container Port Call Indices

Lome records strongest YoY gains, while Las Palmas and Port Louis calls fall steeply
Vessel calls and capacity across sample ports down 9% YoY. North African port range shows greatest resilience, while call volumes drop at Las Palmas and Port Louis ports. Lome is the stand-out performer in West Africa, with MSC using the port for intra-regional transhipment.

The Africa Port Call Indices continued to track upwards in May 2022, with the number of vessels up 3.1% and capacity of vessel calls up 1.2% compared to April 2022.

Africa Container Port Call Index up 3% MoM

On an annualised basis the vessel call index dropped 4.2% and vessel capacity index fell 3.6%. The average vessel size increased 0.6% from 3,870 teu in May 2021 to 3,890 teu in May 2022.

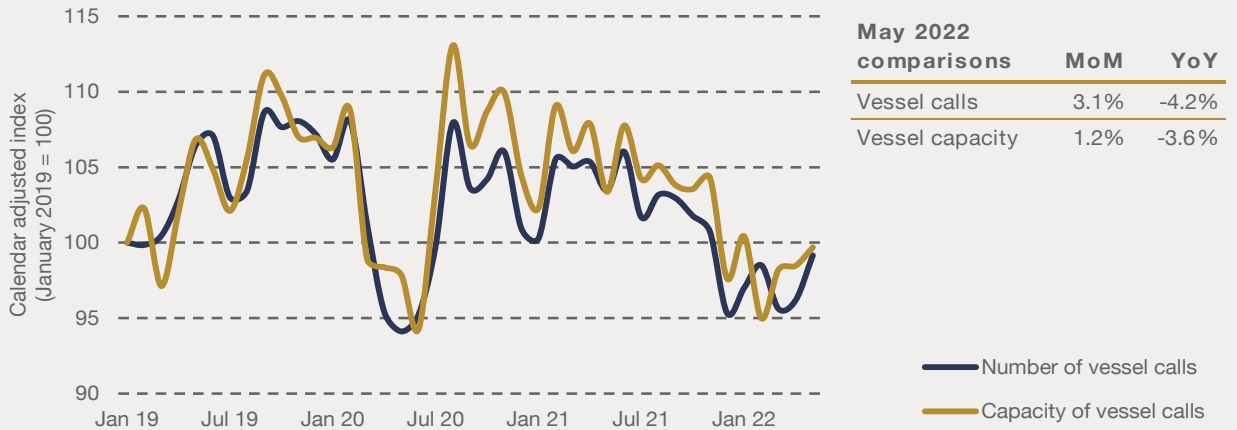
There was an MoM downturn in port call activity at many of the major West African ports – with Abidjan handling 21% fewer calls in May 2022 compared to April 2022, Dakar calls down 18%, Tema calls down 10% and Lome calls down 8%. The main exception was Lagos, where call volumes were up 18% MoM.

In North Africa, Tanger Med continues to strengthen its position with total call volumes up almost 10% MoM, and 16% higher YoY. The average vessel size has also increased 2% YoY to just under 5,400 teu.

Durban and Coega recorded fewer calls in May 2022 compared to April 2022 (-3 calls and -5 calls, respectively), but Cape Town received an additional 6 vessel calls, taking its total calls to 30, its highest monthly total in 2022.

Drewry Africa Container Port Call Indices

Figure 9.3 Drewry Africa Container Port Call Index



Source: Drewry Maritime Research

Drewry Africa Port Performance Indices

Average pre-berth waiting time falls to 0.6 day across

The Drewry Africa Port Performance Indices showed improvement, both monthly and annually, in May 2022.

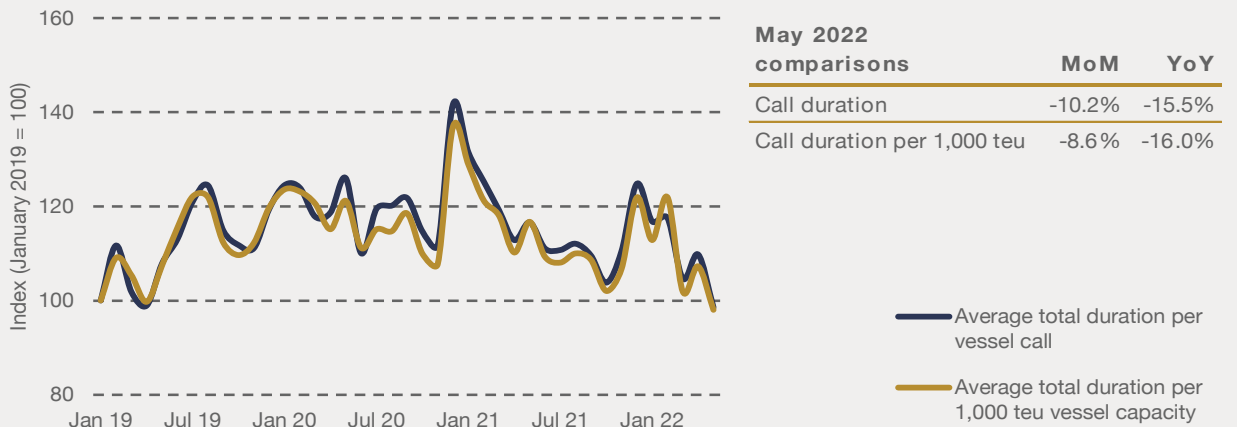
Average call duration dropped 10.2% MoM (average call duration per 1,000 teu -8.6%), driven by a steep reduction in average pre-berth waiting from 0.8 day in April 2022 to 0.6 day in May 2022 (-26.6% MoM). This is 31% below the 2019 average pre-berth waiting time, with Africa the only region where waiting time is below 2019 average level. Terminal time also fell 0.1 day/4.9% MoM to 1.4 days.

Assessment of delays at a port level indicates some significant improvements for the worst congested ports. Average pre-berth waiting fell from 8.8 days in April 2022 to 1.7 days in May 2022 at Dar Es Salaam and from 4.2 days to 1.0 day at Cape Town. Abidjan recorded a smaller improvement, with average pre-berth waiting down 10% to 4.5 days, although the Cote d'Ivoire port is now the worst congested in the region.

Average pre-berth waiting time falls 27% MoM to 0.6 day

Waiting at Dar Es Salaam drops to less than 2 days in May 2022

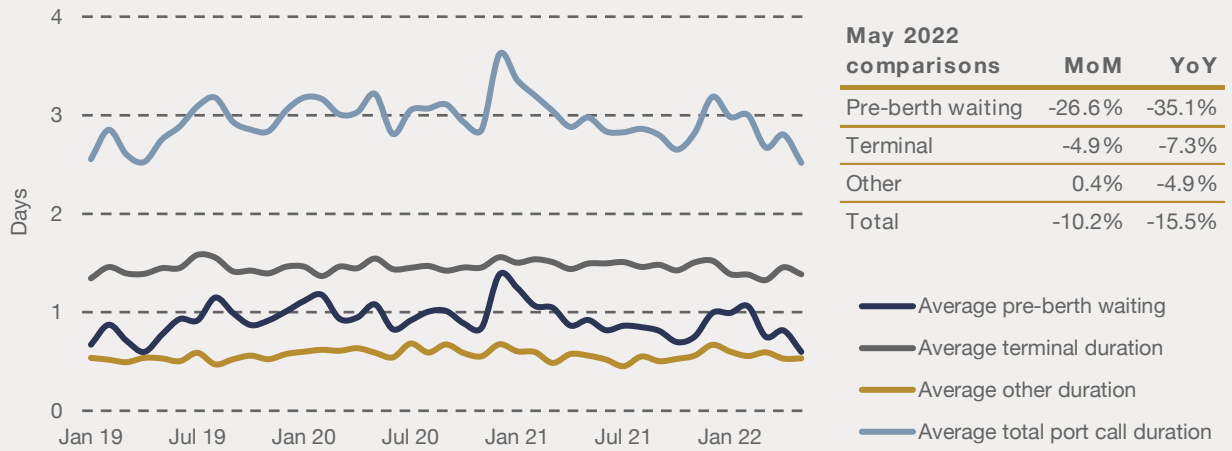
Figure 9.4 Drewry Africa Container Port Performance Index



Source: Drewry Maritime Research

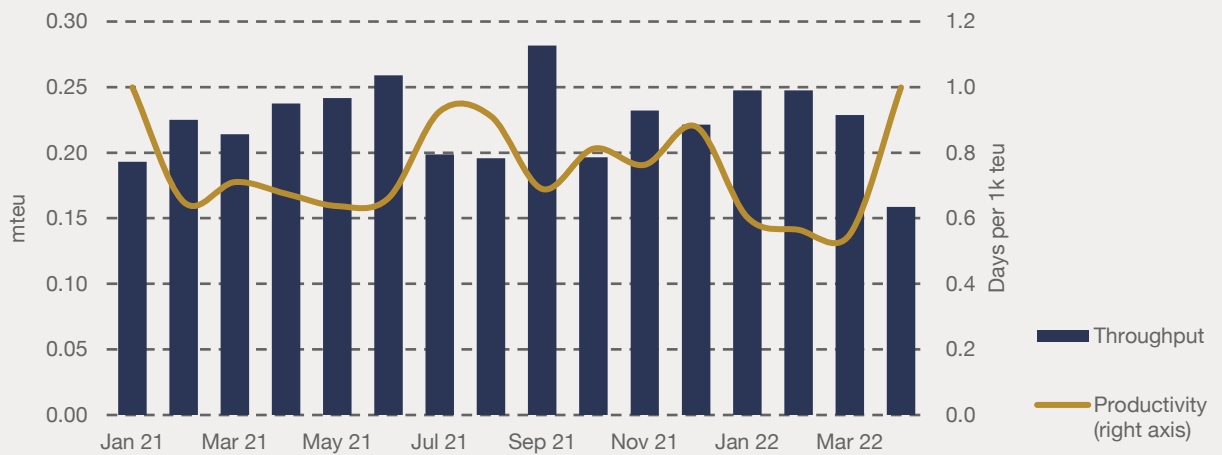
Drewry Africa Port Performance Indices

Figure 9.5 Africa average container port call duration



Source: Drewry Maritime Research

Figure 9.6 Durban port performance, 2021-2022 ytd



Source: Drewry Maritime Research

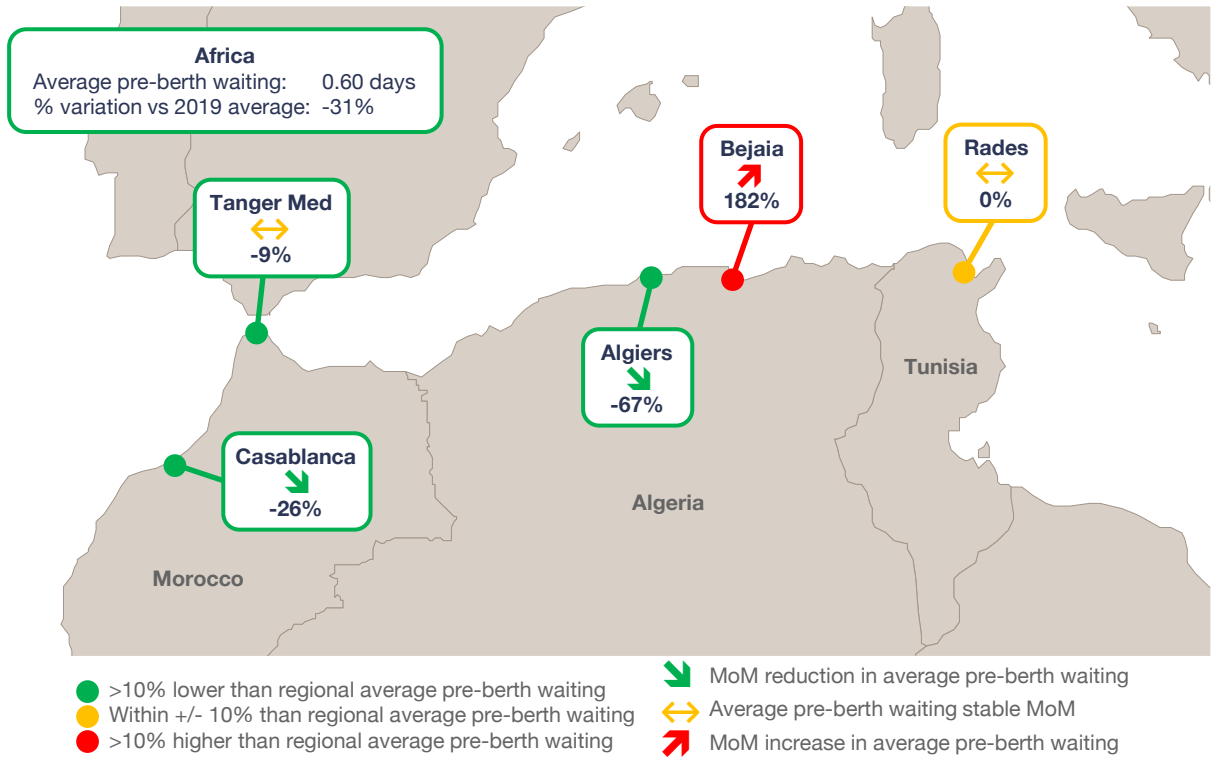
The severe flooding that hit the South African province of KwaZulu-Natal in April 2022 had a massive impact on port operations, which were temporarily suspended due to the damage to the road and rail networks.

Drewry’s analysis indicates that despite monthly throughput falling by over 30% in April 2022, terminal productivity was also reduced. The terminal time per 1,000 teu of port throughput increased 81% to 1.0 day, up from 0.6 day in March 2022. This will be a blow to both terminal managers and customers, as the port had been operating relatively well in 1Q22, moving on from the dual 2021 challenges of Covid-19 and periodic civil unrest.

Terminal productivity reduced in Durban as major floods damage road and rail access

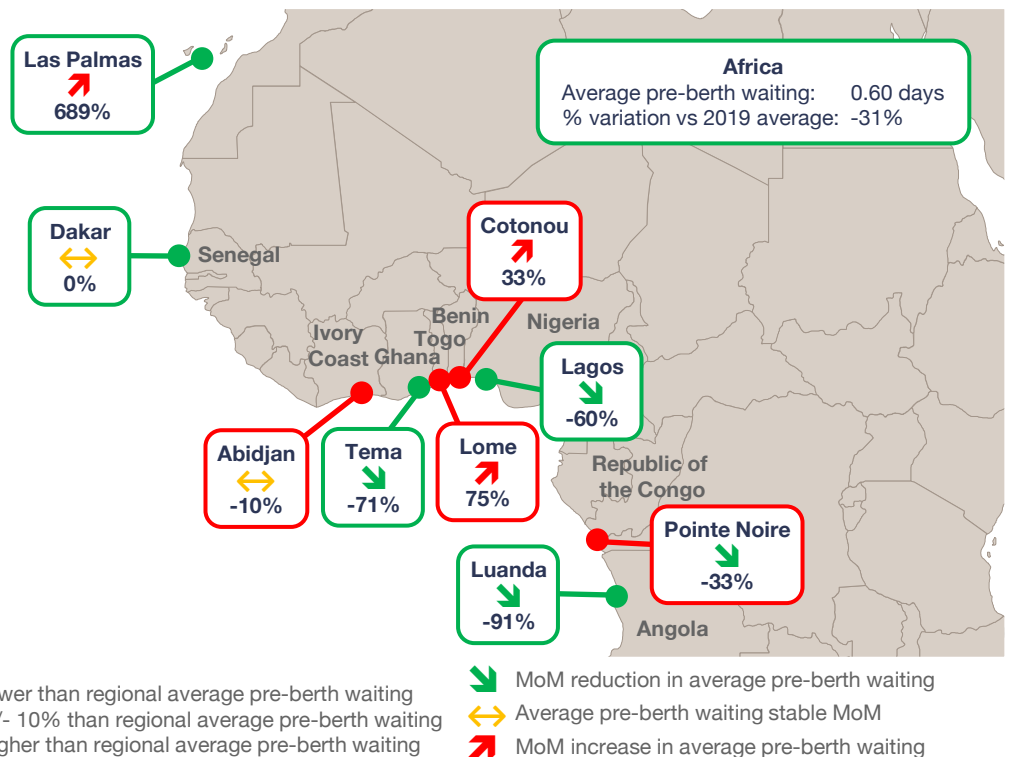
Drewry Africa Port Performance Indices

Figure 9.7 North Africa, pre-berth waiting time, May 2022



Source: Drewry Maritime Research

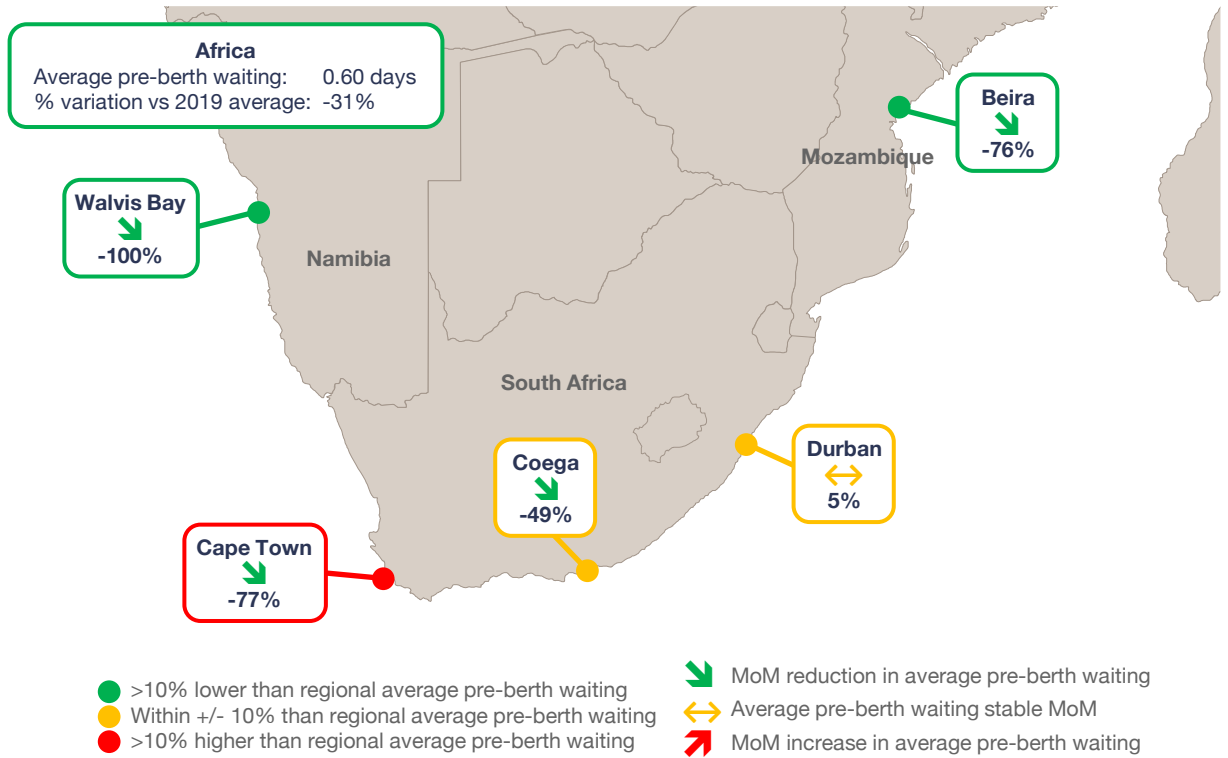
Figure 9.8 West Africa, pre-berth waiting time, May 2022



Source: Drewry Maritime Research

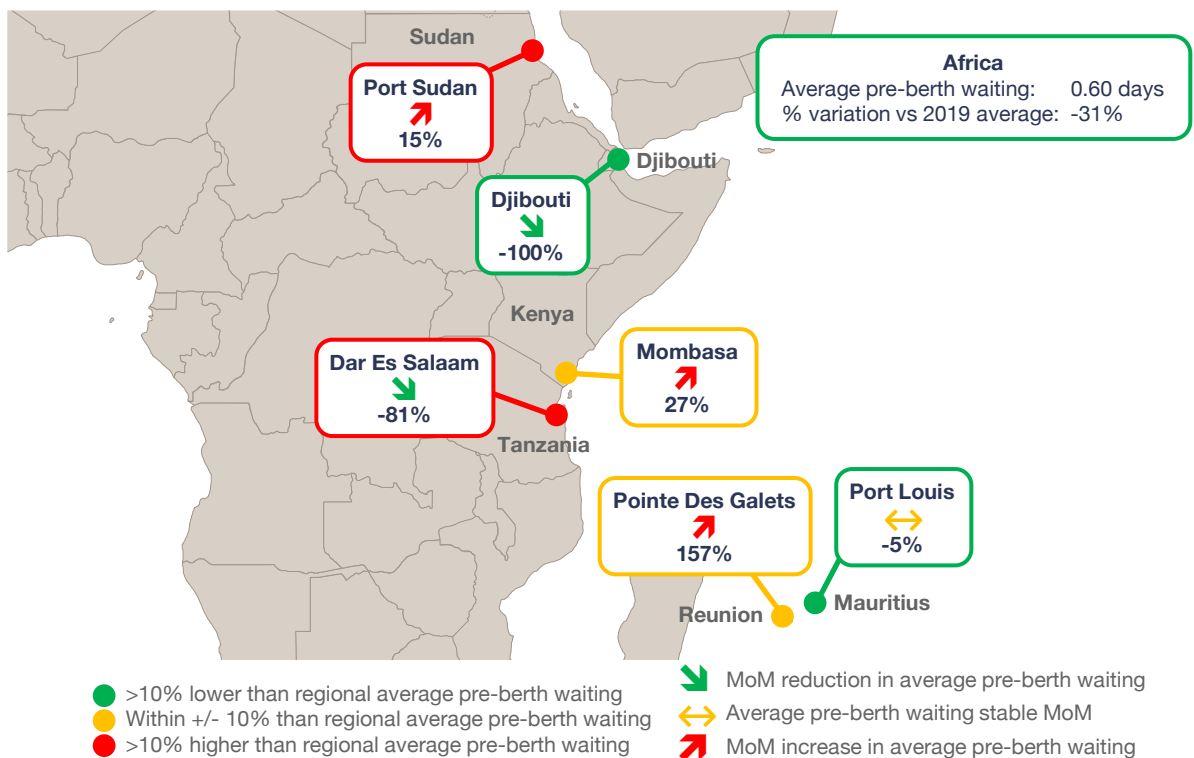
Drewry Africa Port Performance Indices

Figure 9.9 Southern Africa, pre-berth waiting time, May 2022



Source: Drewry Maritime Research

Figure 9.10 East Africa, pre-berth waiting time, May 2022



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 235 ports worldwide, representing over 75% of global volumes.

- The base point for the indices is January 2012 = 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

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 170 ports worldwide which together handle over 80% 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 170 ports worldwide which together handle over 80% 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).

Index shows strong MoM reduction in average call duration across African region ports

Methodology

Regional port congestion assessment

Regional port congestion is measured on basis of average pre-berth waiting for a sample of over 170 ports worldwide which together handle over 80% 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.

Port congestion assessment

Port level congestion is measured on basis of average pre-berth waiting for a sample of over 170 ports worldwide which together handle over 80% 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	
	East Coast North America	USA, Canada, Bermuda	
North America	Gulf Coast North America	USA, Mexico	
	West Coast North America	USA, Canada, Mexico	
	North West Europe	Belgium, Eire, France (North and West Coasts), Germany, Madeira, Netherlands, Spain (Atlantic Coast), Portugal, Azores, United Kingdom	
Europe	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

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	12	81%	Dalian, Guangzhou, Hong Kong, Lianyungang, Ningbo, Qingdao, Rizhao, Shanghai, Shenzhen, Tianjin, Xiamen, Yingkou
	Total Greater China	12	81%	
Asia (ex. China)	North Asia	11	80%	Busan, Gwangyang, Incheon, Kaohsiung, Kobe, Nagoya, Osaka, 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)	23	85%	
North America	East Coast North America	9	82%	Baltimore, Charleston, Hampton Roads, Miami, Montreal, New York, Philadelphia, Port Everglades, Savannah
	Gulf Coast North America	3	76%	Altamira, Houston, 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	21	86%	
Europe	East Mediterranean & Black Sea	14	70%	Alexandria, Ambarli, Ashdod, Asyaport, Beirut, Damietta, Haifa, Koper, Mersin, Nemrut Bay, Novorossiysk, Piraeus, Port Said, Poti
	Northwest Europe	9	82%	Antwerp, Bremerhaven, Felixstowe, Hamburg, Le Havre, Port Of London, Rotterdam, Sines, Southampton
	Scandinavia & Baltic	8	68%	Aarhus, Helsinki, Kotka, Klaipeda, Gdansk, Gdynia, Saint Petersburg, Gothenburg
	West Mediterranean	8	84%	Algeciras, Barcelona, Genoa, Gioia Tauro, La Spezia, Marsaxlokk, Marseilles-Fos, Valencia
	Total Europe	39	78%	
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	7	82%	Chennai, Chittagong, Colombo, Jawaharlal Nehru, Karachi, Mundra, Port Qasim
	Total Middle East & South Asia	17	86%	
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	7	78%	Buenos Aires, Itajai, Itapoa, Montevideo, Paranagua, Rio Grande, Santos
	West Coast South America	6	77%	Buenaventura, Callao, Coronel, Guayaquil, San Antonio, Valparaiso
	Total Latin America	28	80%	
Oceania	Oceania	6	75%	Auckland, Brisbane, Fremantle, Melbourne, Sydney, Tauranga
Total Oceania	6	75%		
Africa	East Africa	6	92%	Dar Es Salaam, Djibouti, Mombasa, Pointe Des Galets, Port Louis, Port Sudan
	North Africa	5	86%	Algiers, Bejaia, Casablanca, Rades, Tanger Med
	Southern Africa	5	92%	Beira, Cape Town, Coega, Durban, Walvis Bay
	West Africa	9	77%	Abidjan, Cotonou, Dakar, Lagos, Las Palmas, Lome, Luanda, Pointe Noire, Tema
	Total Africa	25	84%	
Global		171	82%	

Source: Drewry Maritime Research

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