



## How does the Sub-saharan Africa port sector adapt to recent shipping industry trends ?

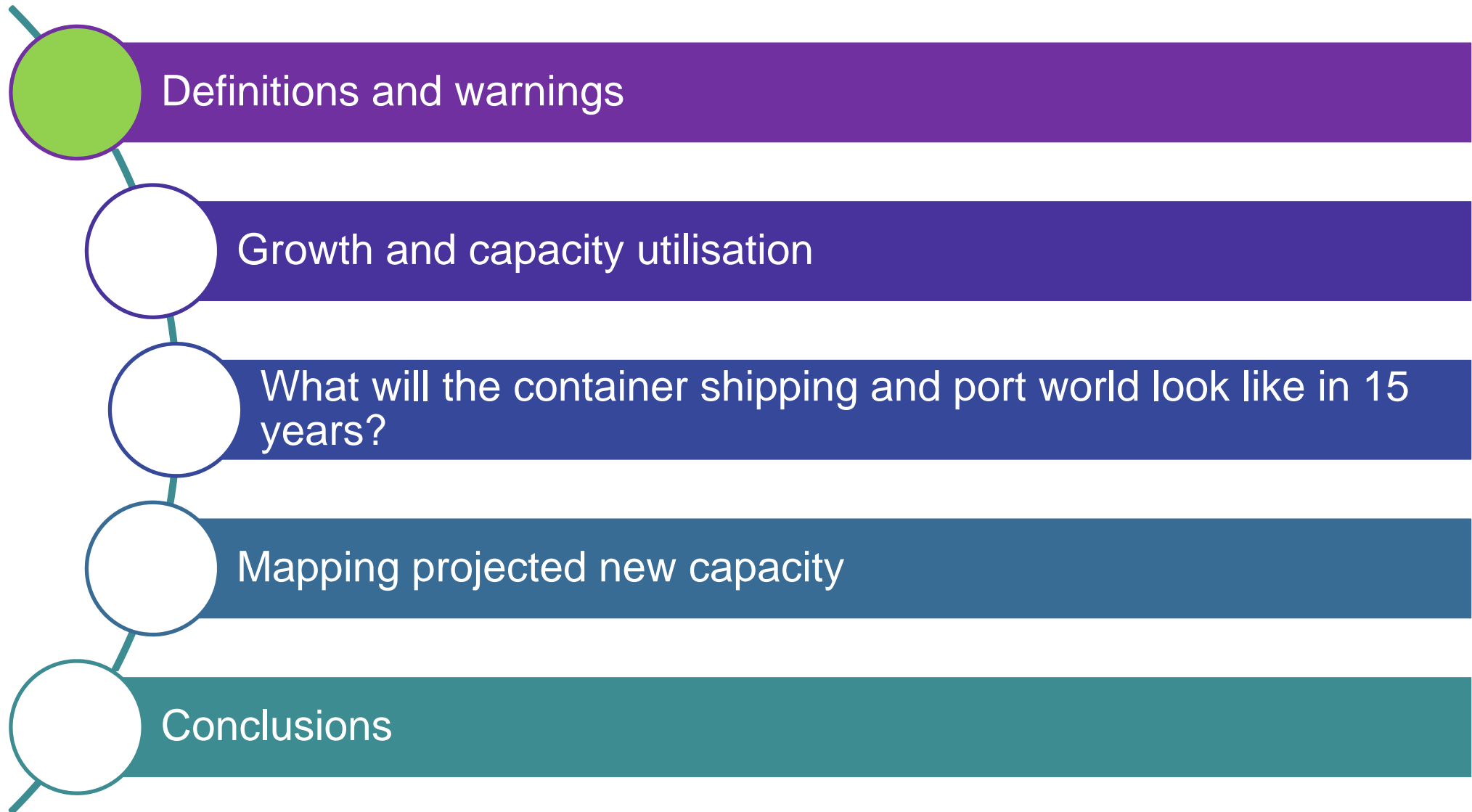
12<sup>th</sup> Intermodal Africa Conference - Durban



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# Agenda

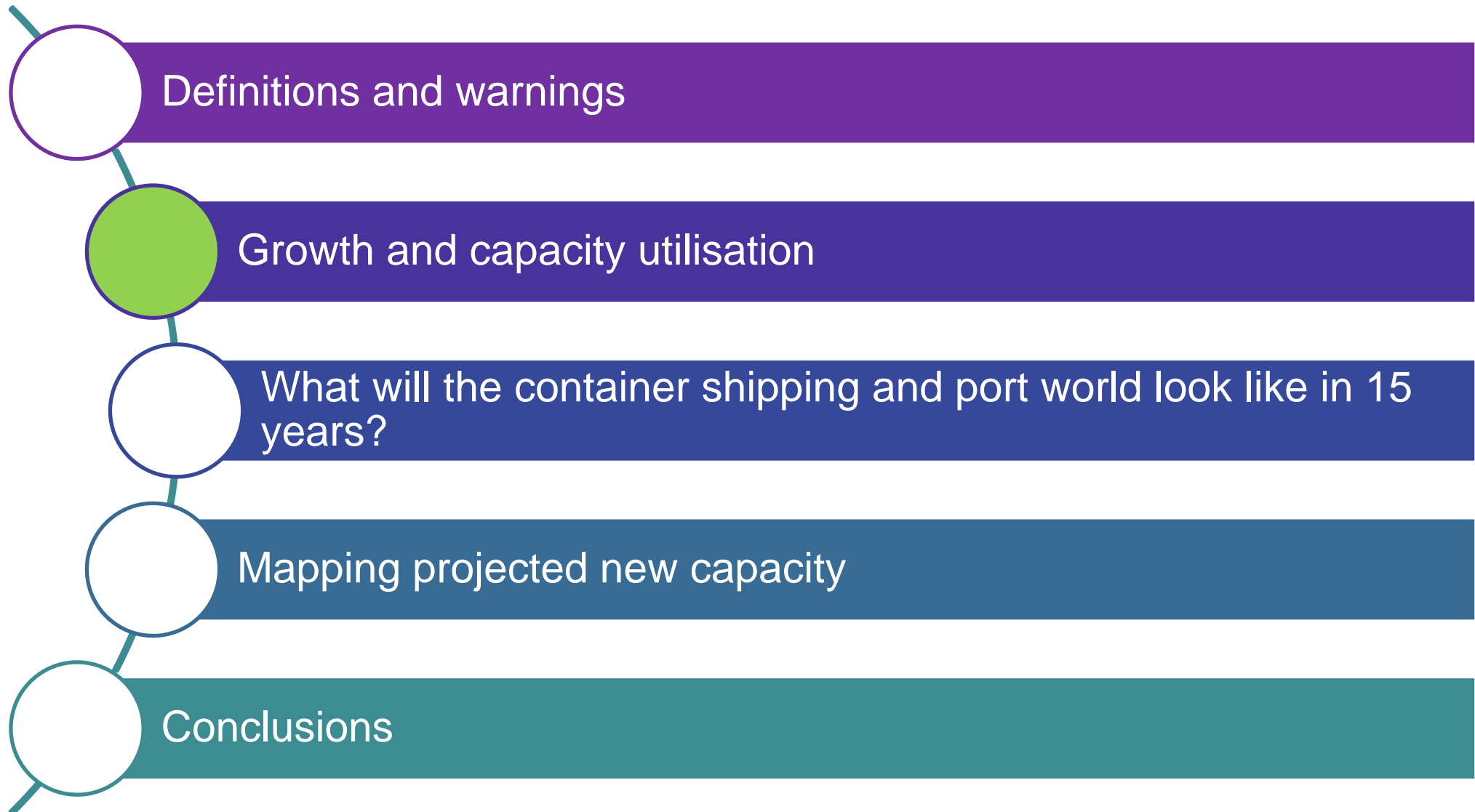


# Definitions and warnings

- ▶ **The list is not exhaustive**
- ▶ **Period 2014 - 2020+**
- ▶ **Data from public domain**
- ▶ **Sliding time-frames & fluctuating phases**
- ▶ **Some projects might never see the light**
- ▶ **Capacity as given by project developers**
- ▶ **Contains estimates**
- ▶ **Mppc = multipurpose port complex**



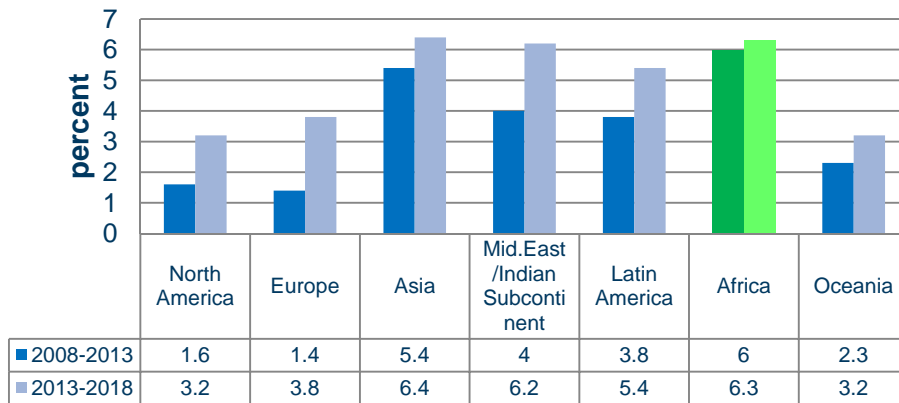
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# Growth and capacity utilisation

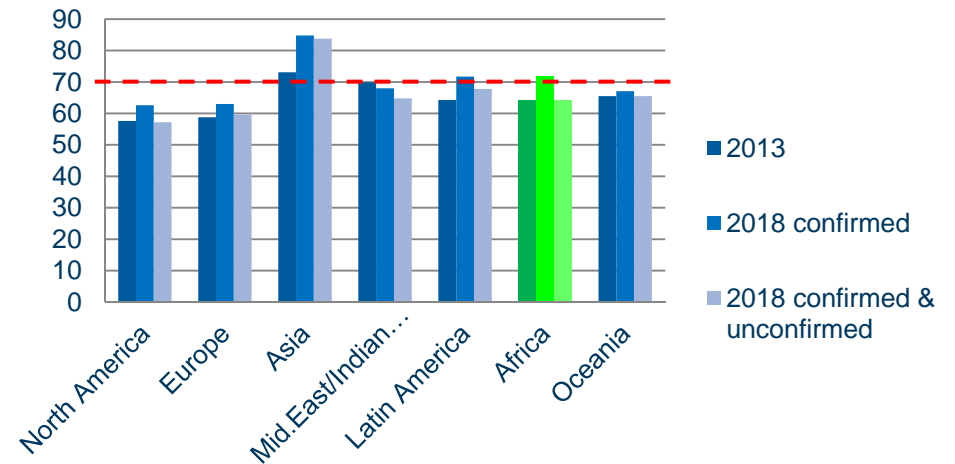
- ▶ Africa is among the top performers in terms of port throughput growth

Port throughput growth/y

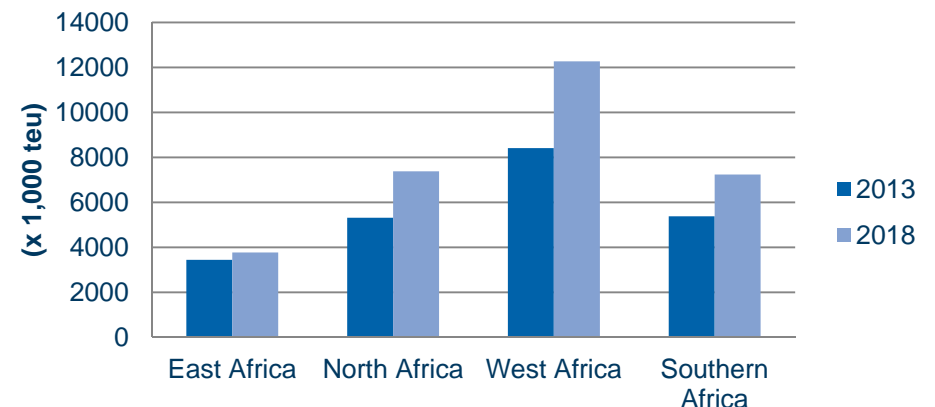


- ▶ Container terminals capacity utilisation in Africa is estimated to exceed 70% by 2018 if only the confirmed projects come to fruition
- ▶ Local situations may diverge significantly

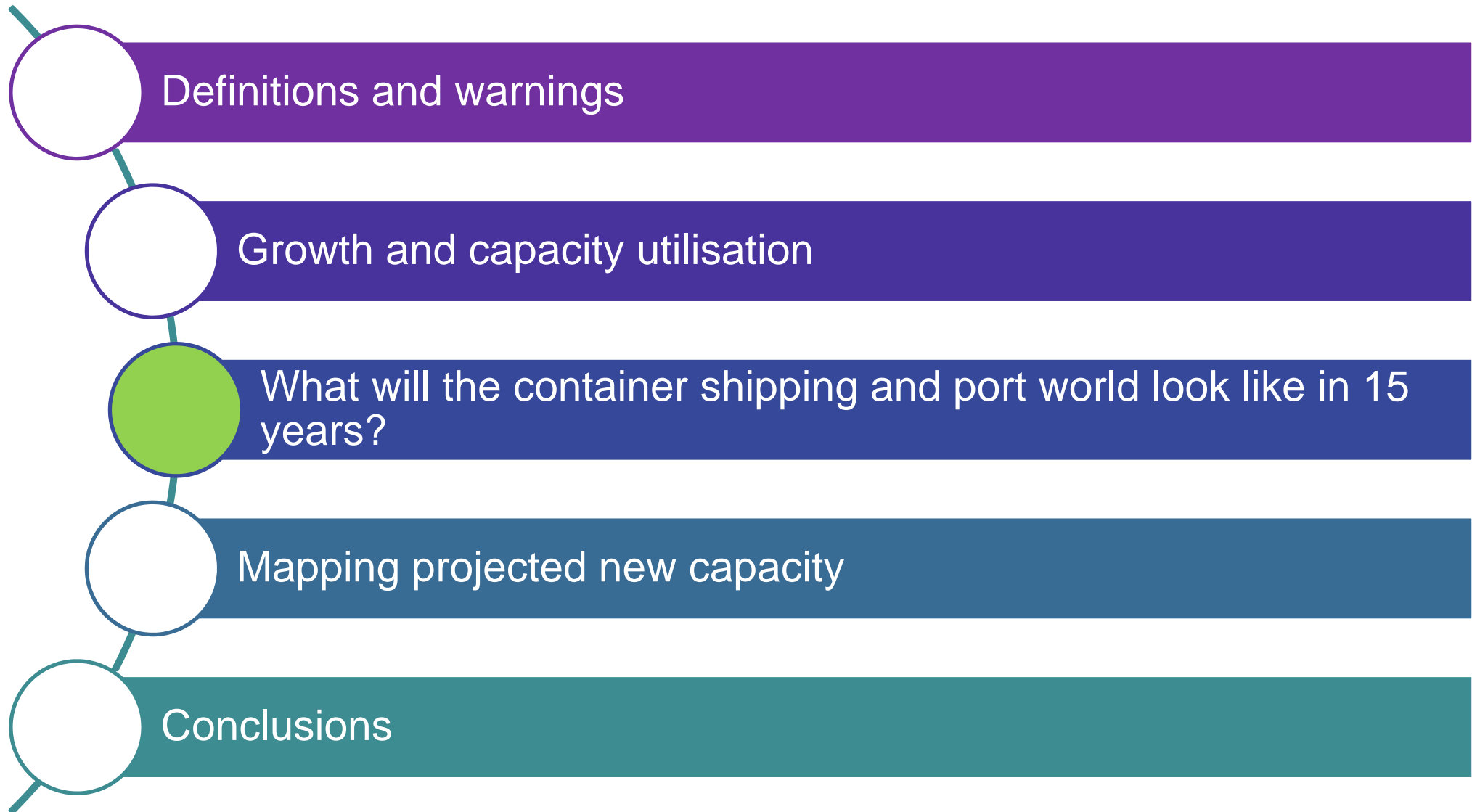
Capacity utilisation (%)



Volume projections 2013-18



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# Lines' strategies

Pursuit of economies of scale ...in all trade lanes: bigger and more fuel-efficient ships



Maersk Line 18,000 teu vessels on Asia-Europe route

Hamburg Sud purpose-built 9,800 teu vessels on Asia- East Coast South America route (via South Africa ?)





# What will the container shipping and port world look like in 15 years?

<b>Big changes</b>	<u>2000</u>	<u>Today</u>	<u>2020</u>
Largest container ship (teu)	7,060	18,000	22,000+
Super post-Panamax gantries	20	1,160	2,000+
Market share top 4 terminal operators *	~25%	~41%	?
Number of major liner alliances/players	7	4	?

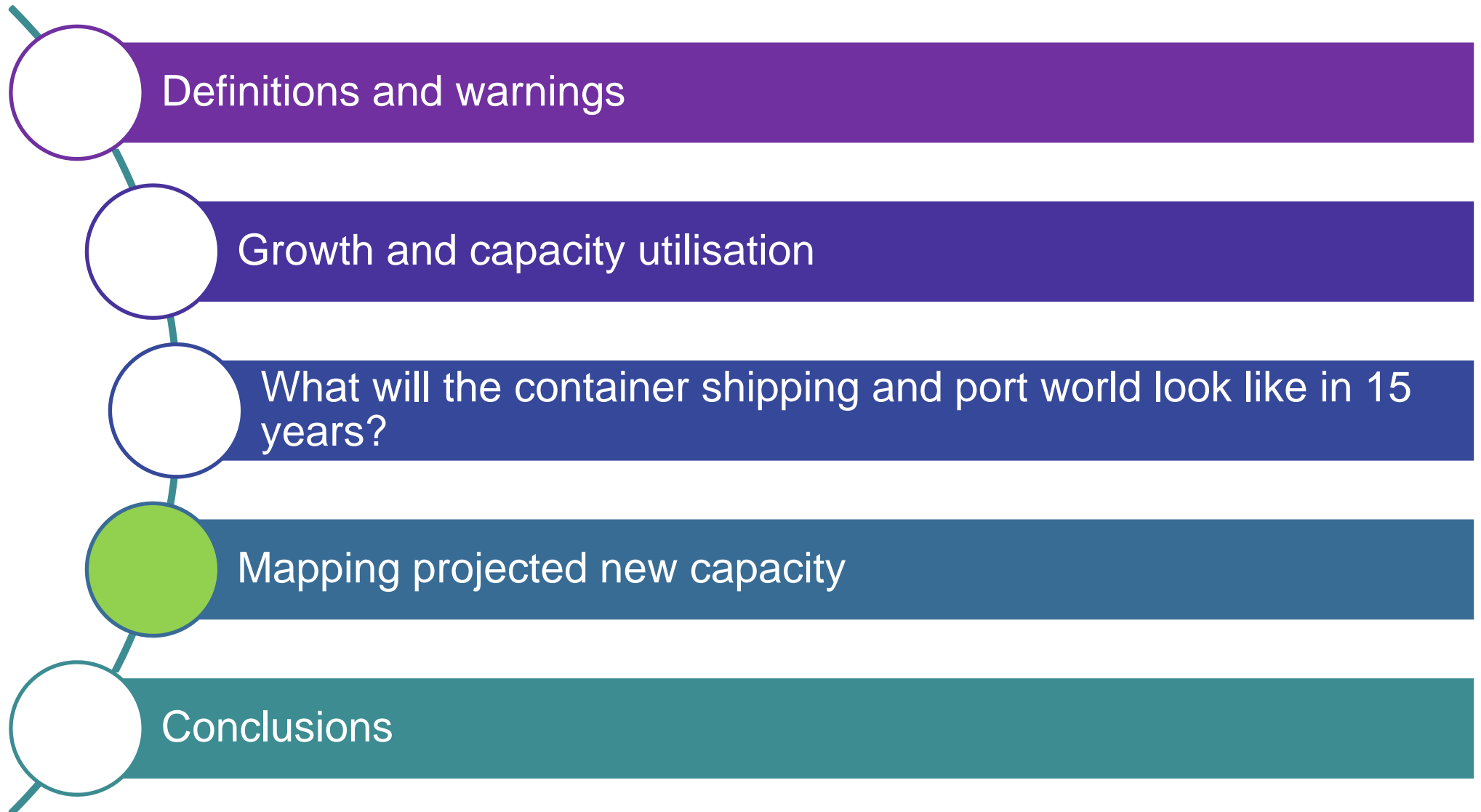
\* total teu basis



## What will the container shipping and port world look like in 15 years?

<b>Big changes</b>	<u>2000</u>	<u>Today</u>	<u>2020</u>
World port teu throughput	235m	623m	~1 billion
Global transshipment teu	58m	175m	~320m
Asian ports' share of world teu	47%	56%	65%+
Chinese ports' share of world teu	16%	30%	40%+

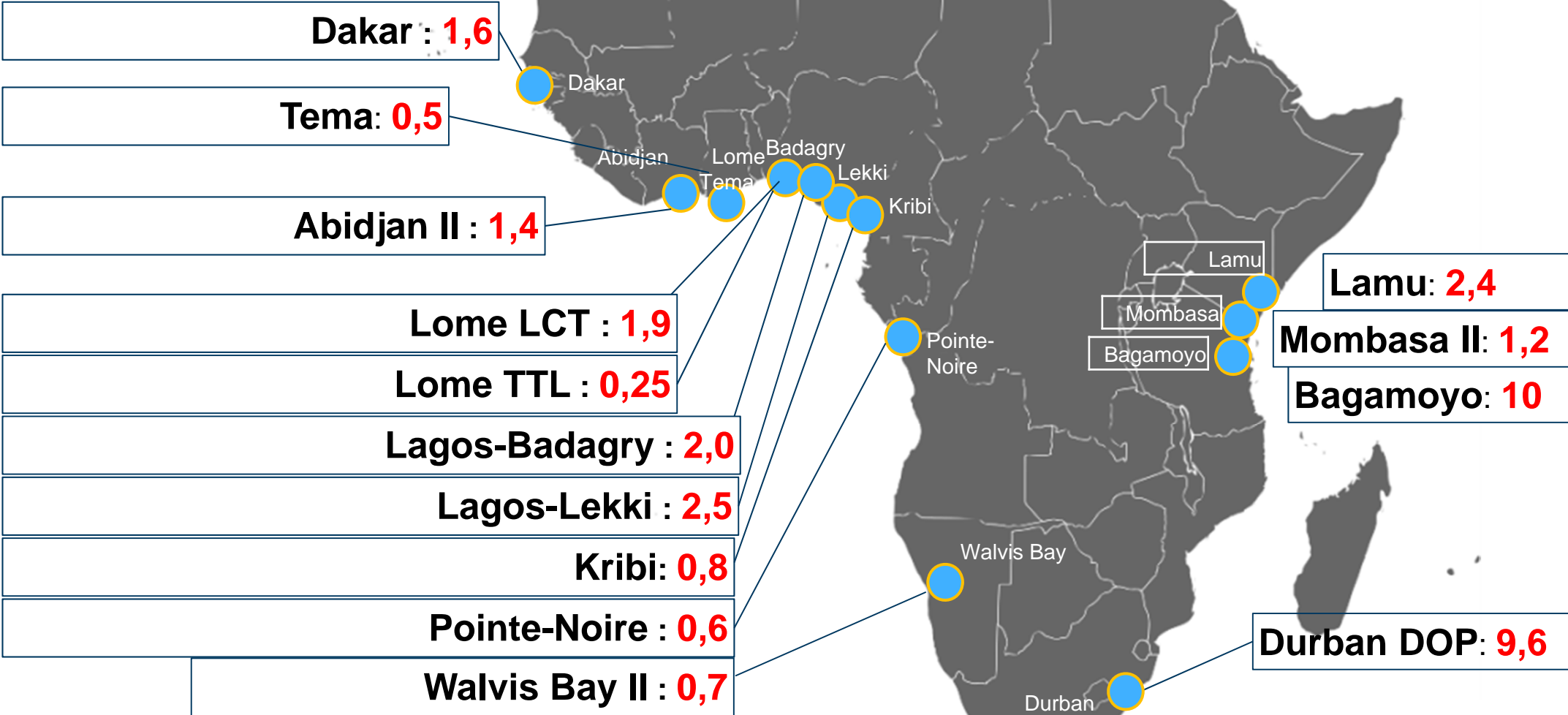
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# Main capacity increases

in West Africa: **11,55** mio. teu

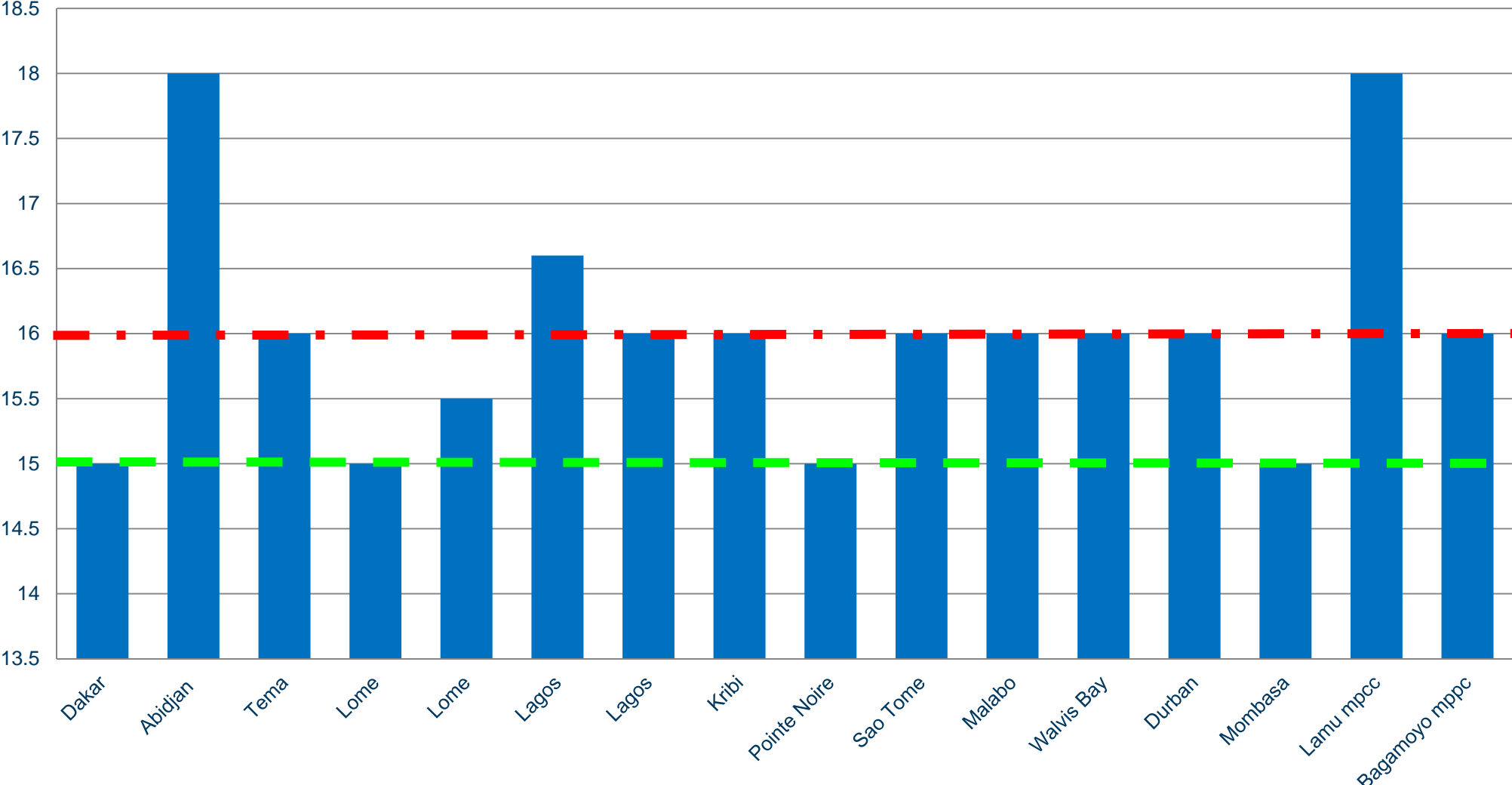
in East and Southern Africa: **23,9** mio. teu



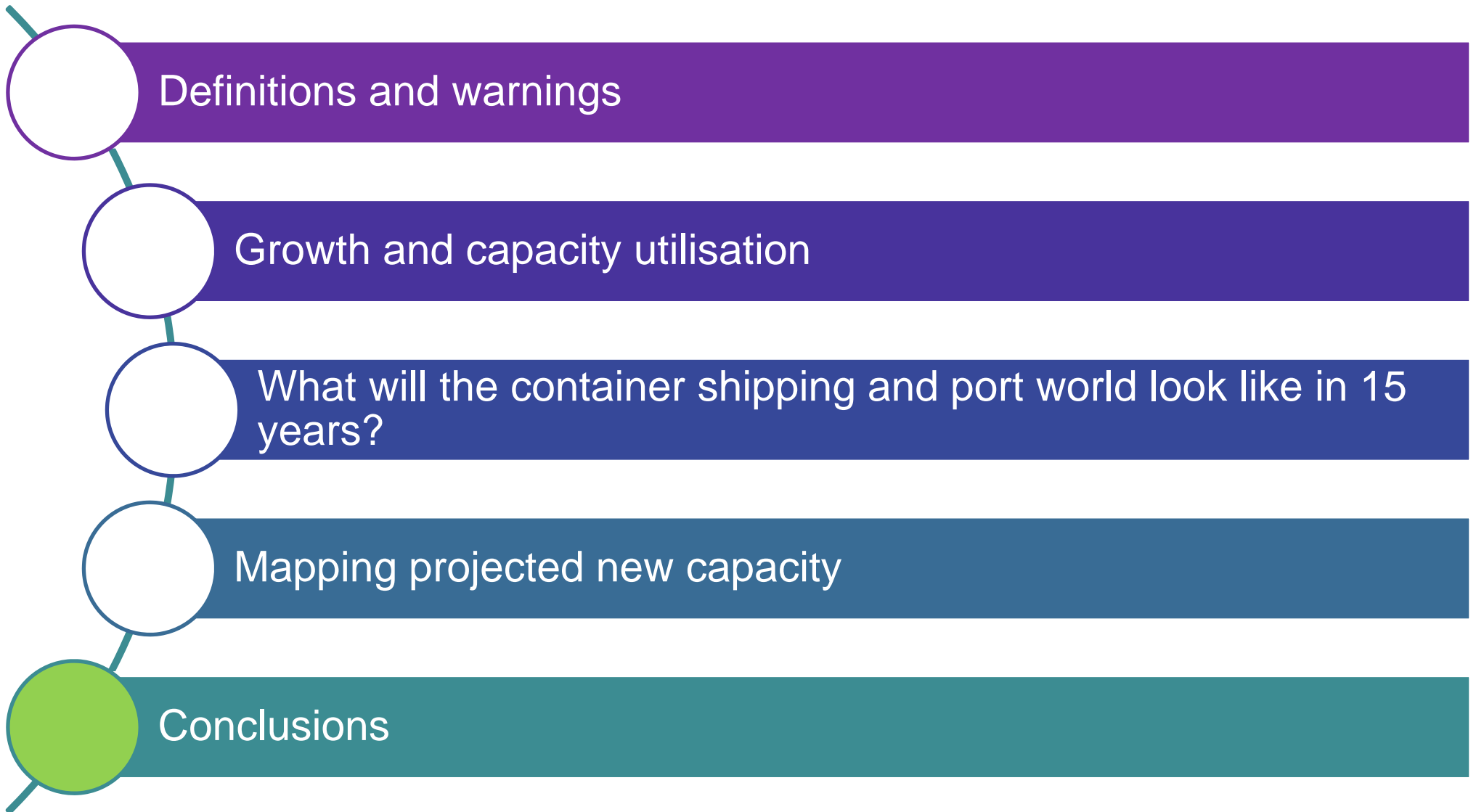
Source: Drewry Maritime Advisors

# Projected water-depths between -15 m and -16 m

projected water-depths (m)



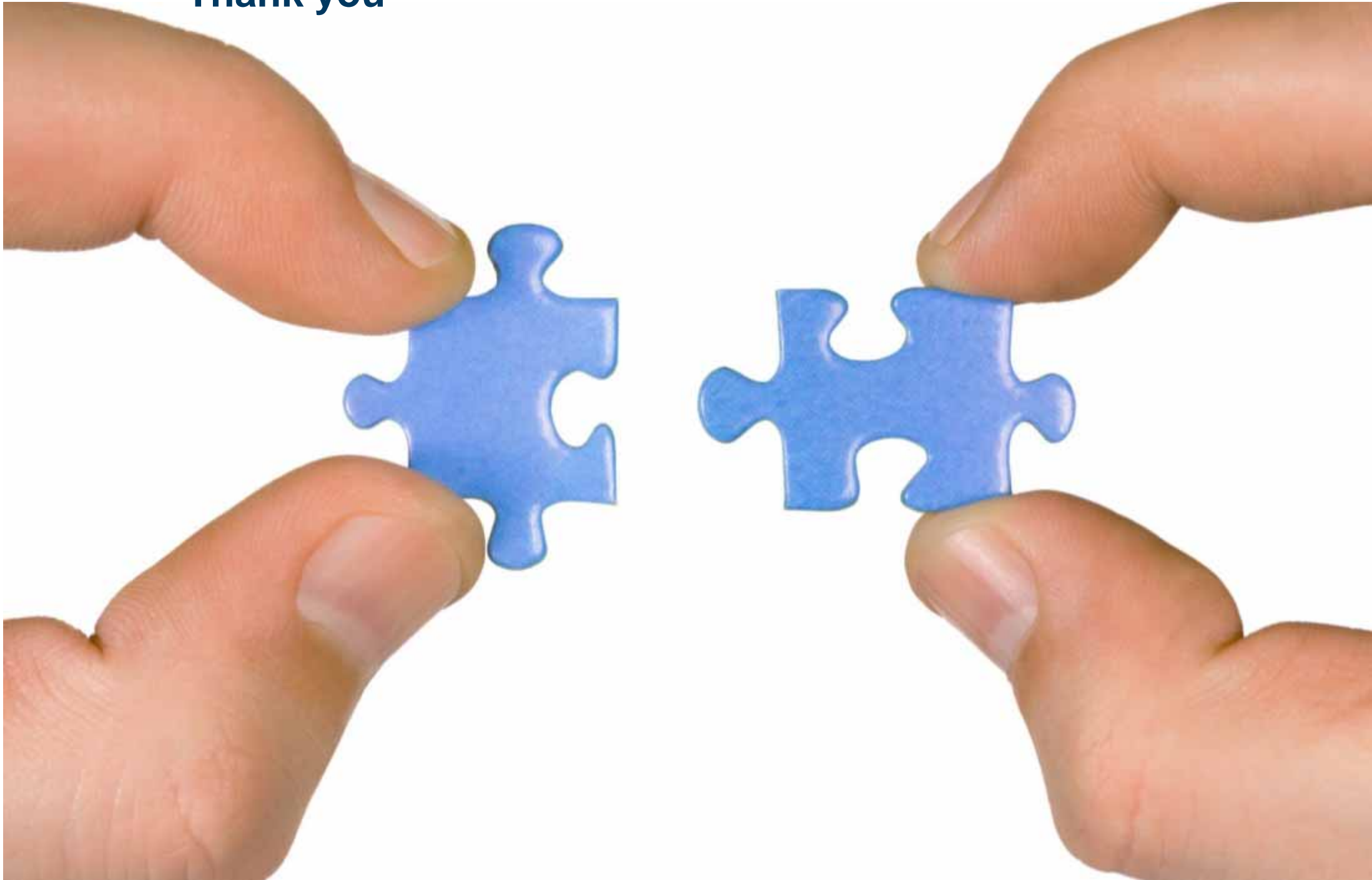
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# Conclusions

- ▶ Lines' strategies: pursuit of economies of scale ...in all trade lanes: bigger and more fuel-efficient ships
- ▶ By 2020, terminal projects should provide 11,5 million teu/y new, deepwater capacity in West Africa
- ▶ Southern Africa and East Africa have 23,9 million teu/y new, deepwater capacity projects, of which 22 are part of 3 mega multipurpose port complexes projects. (timing?)
- ▶ All these projects have at least -15 m water-depth
- ▶ All these projects are aiming at handling vessels from 7000 to 18000 teu capacity
- ▶ The new liner network pattern will be a mixture of transshipment and direct-calls
- ▶ The actual balance and border-line will be a result of each line's maths, which are very evolutive

**Thank you**





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Bespoke consultancy

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Maritime equity research

World Container Index

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## Sector based experience

Our team combines the necessary experience, knowledge and practical understanding of maritime industry, its operations and financing

- ▶ Over the years, Drewry has become a trusted adviser to CEOs and other senior management of fleets, service and logistics companies and port authorities across the world

Expertise Market	Commercial	Supply Chain	Benchmarking	Shipbuilding and repair	Due diligence	Market analysis
Oil tanker market	✓	✓	✓	✓	✓	✓
Dry bulk	✓	✓	✓	✓	✓	✓
Gas (LPG/LNG)	✓	✓	✓	✓	✓	✓
Chemical	✓	✓	✓	✓	✓	✓
Offshore	✓	✓	✓	✓	✓	✓
Container	✓	✓	✓	✓	✓	✓
Cruise/passenger/RoRo	✓	✓	✓	✓	✓	✓
Ports and terminals	✓	✓	✓		✓	✓

Drewry was founded in 1970 as a provider of independent information and advice to the global maritime industry. Since then we have worked with over 4,000 clients in more than 100 countries.

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