


10<sup>TH</sup> INDIAN OCEAN  
PORTS & LOGISTICS  
2016

SEM Nordev  
Reunion Island  
28 - 29 Jan  
2016

  
TRANSPORT EVENTS

*The biggest annual market leading Container Ports,  
Shipping and Transport Logistics Exhibition and Conference*



**10th Indian Ocean Ports and Logistics Conference  
Réunion Island - January 28-29, 2016**

**Container traffic at Indian Ocean Ports,  
1992-2014**

**Jacques Charlier**

**Emeritus Professor of Geography**

**University of Louvain-la-Neuve, Belgium**

**Managing Director, Mercator Consulting**

# Methodology for this cartographic overview of container traffics at Indian Ocean ports

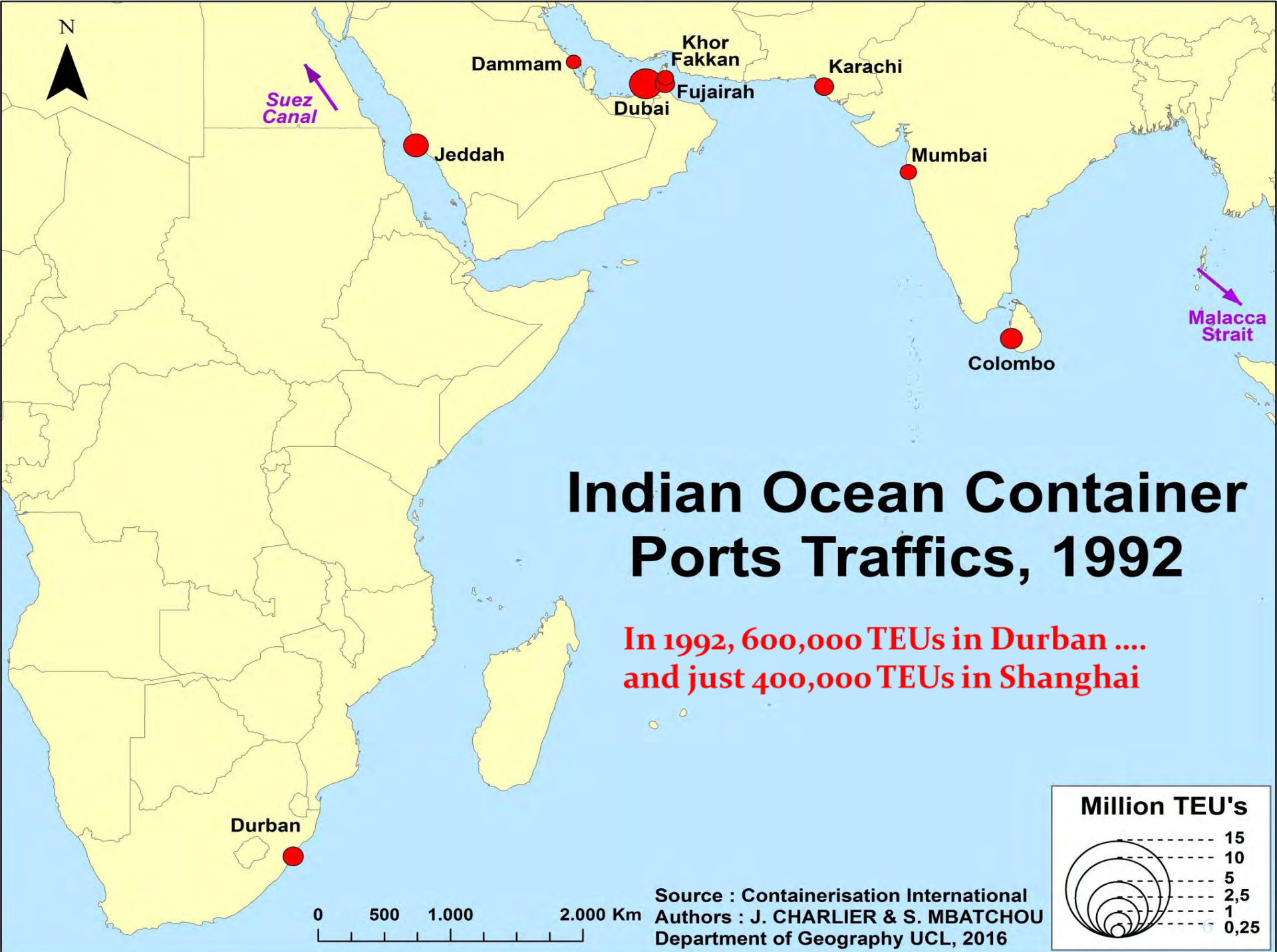
1. Last available year : 2014 (calendar year or fiscal year)
2. Long term perspective : 1992, 2000, 2008 and 2014
3. All traffics in million TEU's (main source : *Containerisation International* + port industry sources)
4. Some estimated figures and also probably missing data!
5. Lower limit for port traffics: first 250,000 TEU's, then 100,000 TEU's for the four final maps.

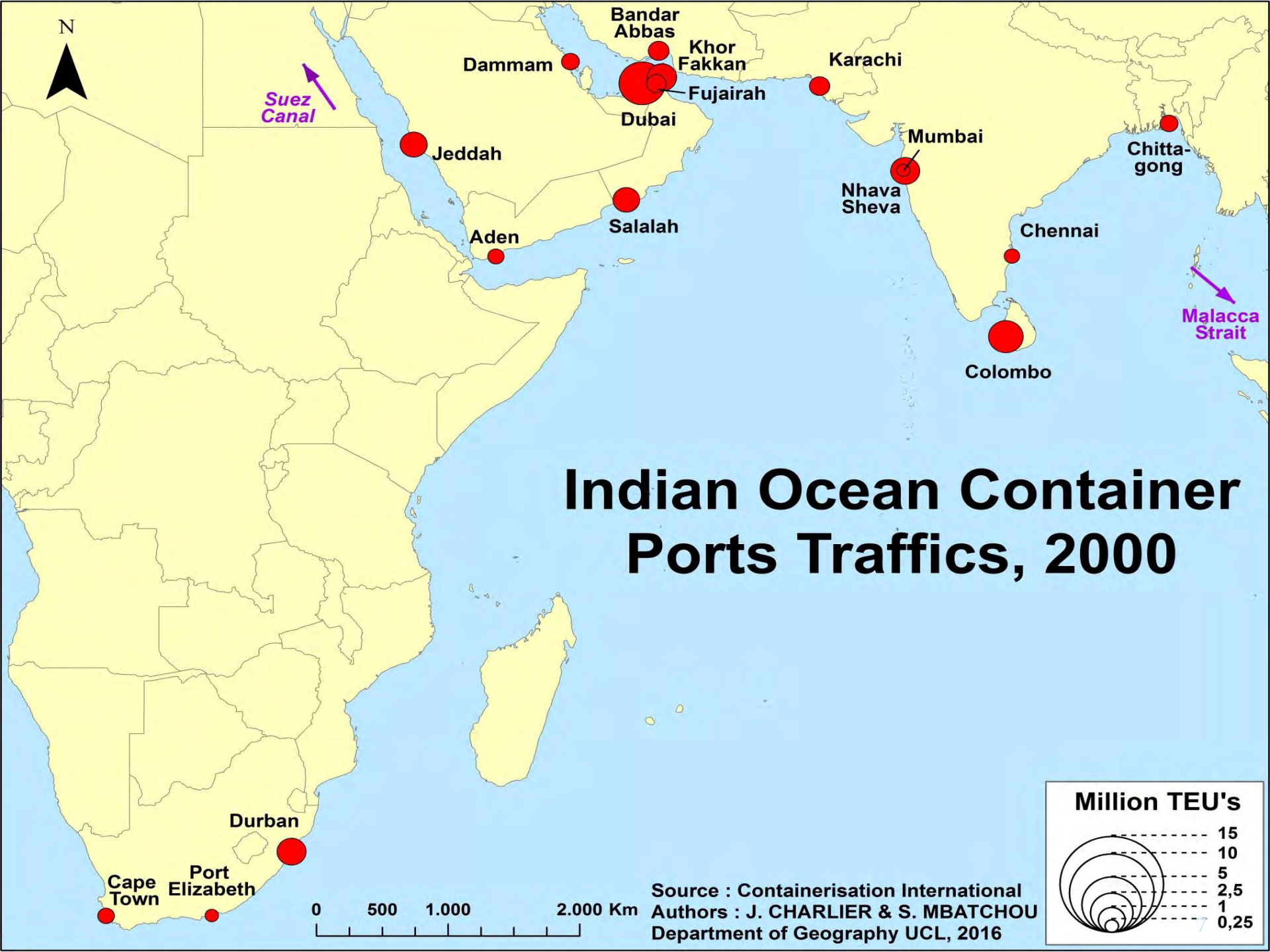
# A series of 10 maps featuring container traffics for the Indian Ocean area as a whole + three regional zooms

	Lower limit (TEU's)	1992	2000	2008	2014
Indian Ocean as a whole	<b>250,000</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>
Zoom on the Middle East	<b>250,000</b>				<b>X</b>
Zoom on South Asia	<b>250,000</b>				<b>X</b>
Zoom on the SW Indian Ocean	<b>100,000</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>

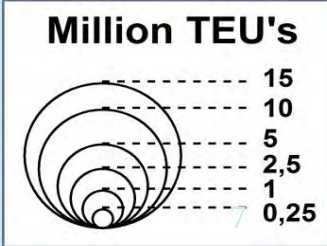
# Container Traffics at Indian Ocean Ports, 1992-2014 (million TEU's)

	1992	2000	2008	2014	Growth
Middle East	3.8	8.4	27.2	36.0	X 9.5
South Asia	2.2	5.7	14.5	21.7	X 10
South West	1.0	2.6	5.4	7.5	X 7.5
<b>Total</b>	<b>7,0</b>	<b>16.7</b>	<b>47.1</b>	<b>65.2</b>	<b>X 9.5</b>

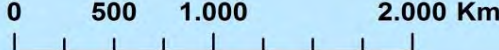


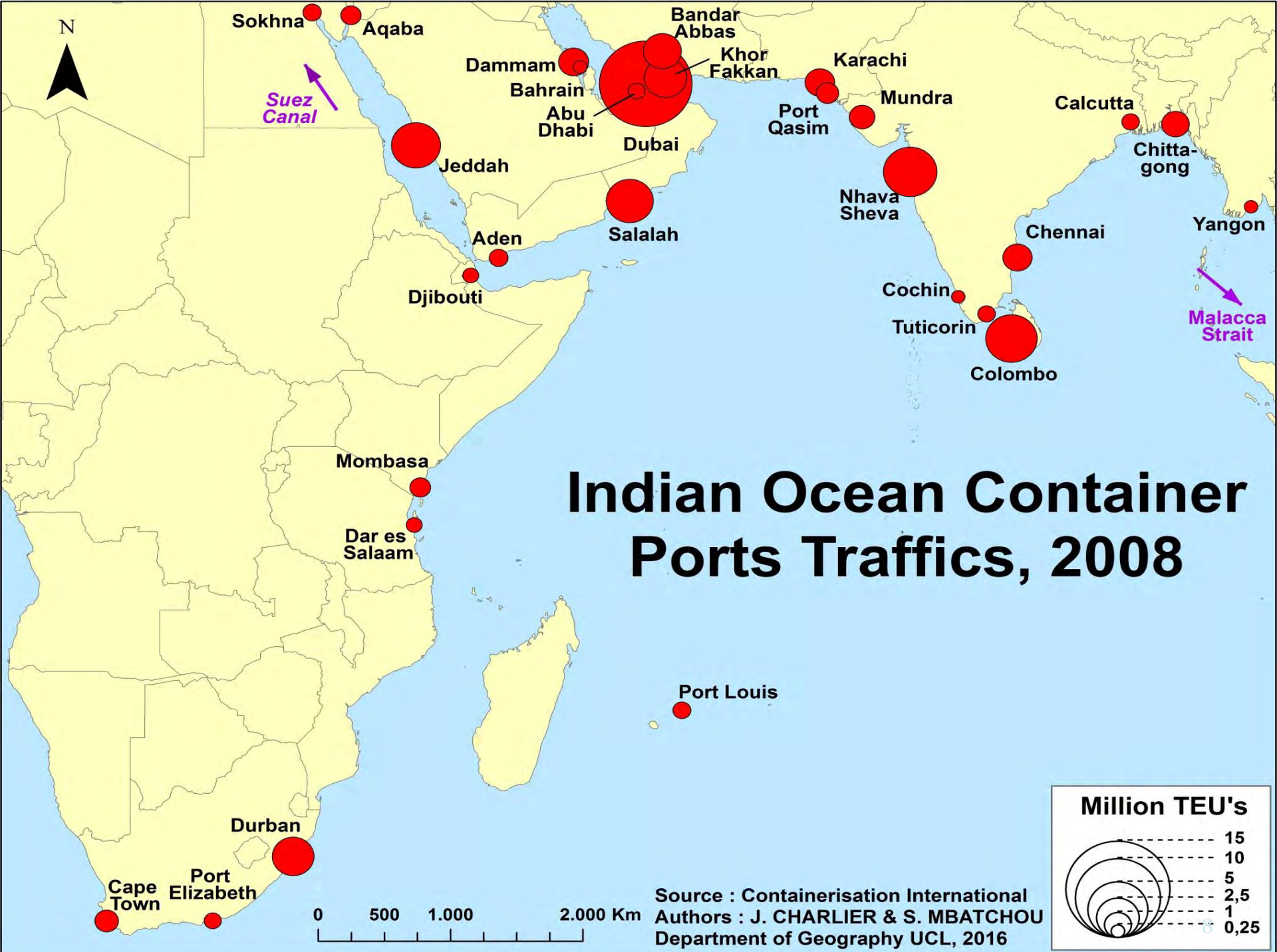


# Indian Ocean Container Ports Traffics, 2000

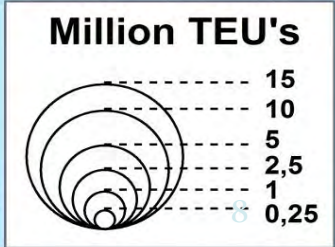


Source : Containerisation International  
 Authors : J. CHARLIER & S. MBATCHOU  
 Department of Geography UCL, 2016



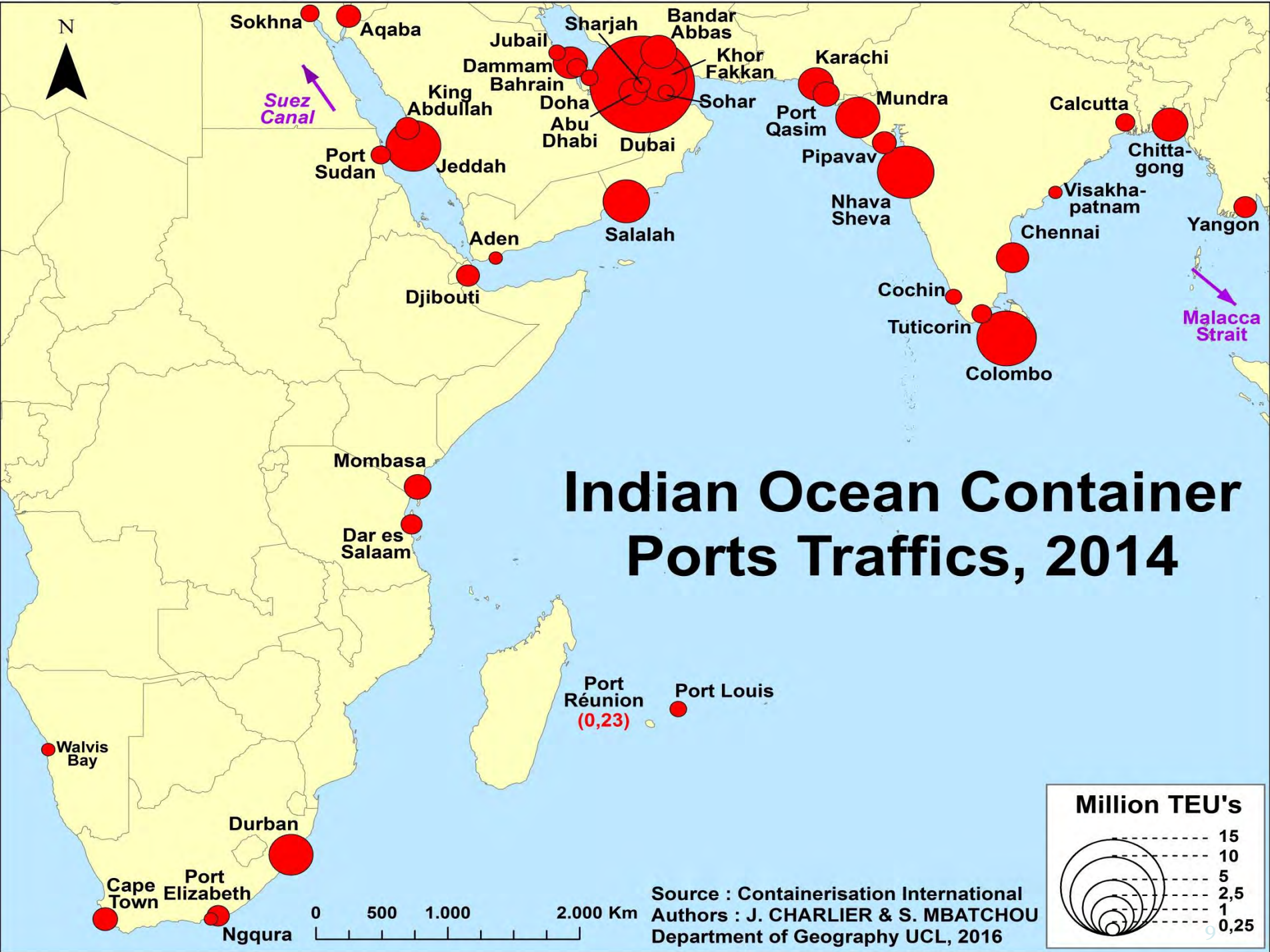


# Indian Ocean Container Ports Traffics, 2008

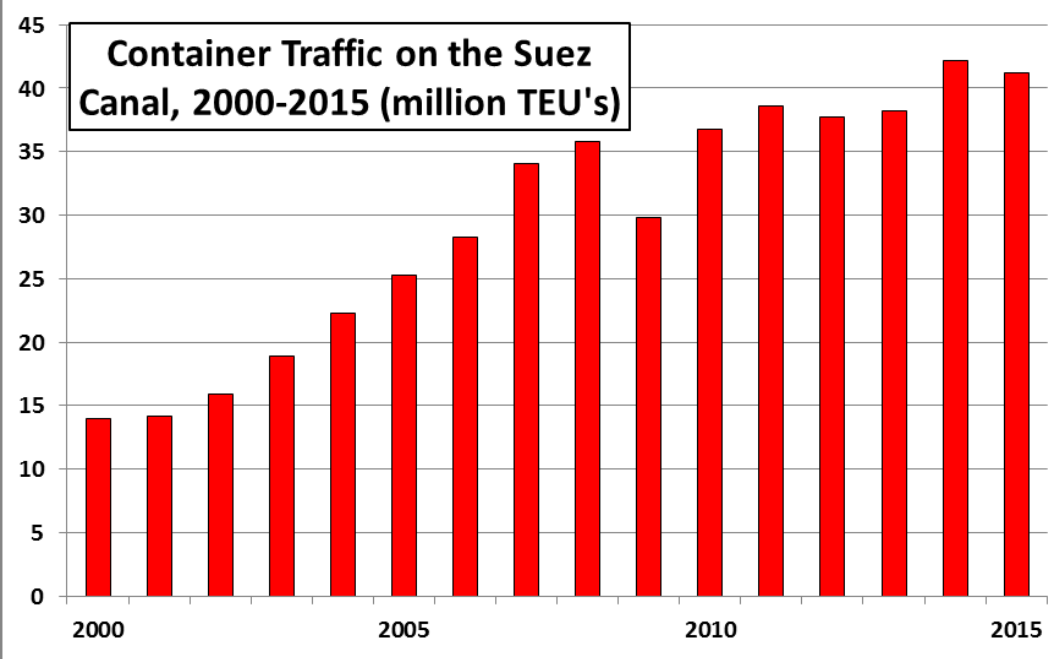
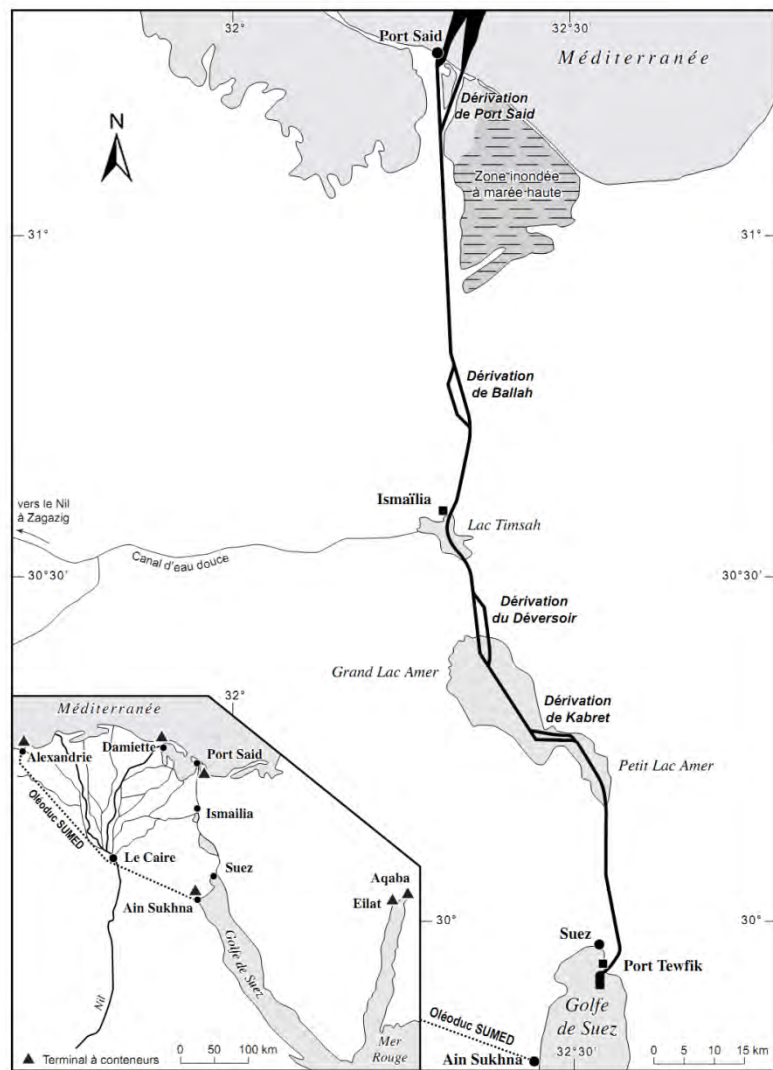


Source : Containerisation International  
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# The Suez Canal is the Western Gateway to the Indian Ocean (41.2 million TEU's in 2015!)



# Container Traffics at Middle East Container Ports, 1992-2014 (million TEU's)

	1992	2000	2008	2014
Dubai	1.5	3.1	11.8	15.2
Jeddah	0.9	1.0	3.3	4.2
Khor Fakkan	0.4	1.2	2.5	3.4
Salalah	0.0	1.0	3.1	3.0
Bandar Abbas	0.1	0.6	2.0	1.8
Other ports	0.9	9.7	24.1	38.1
<b>Sub-total</b>	<b>3.8</b>	<b>16.6</b>	<b>46.8</b>	<b>65.7</b>

# Middle East Container Ports Traffics, 2014



# Of course, there is Dubai (Jebel Ali), but there are also a series of new ports in the region!

Dubai's Creek fifty years ago .....



..... and Jebel Ali Port today



Port Khalifa is Abu Dhabi's new port



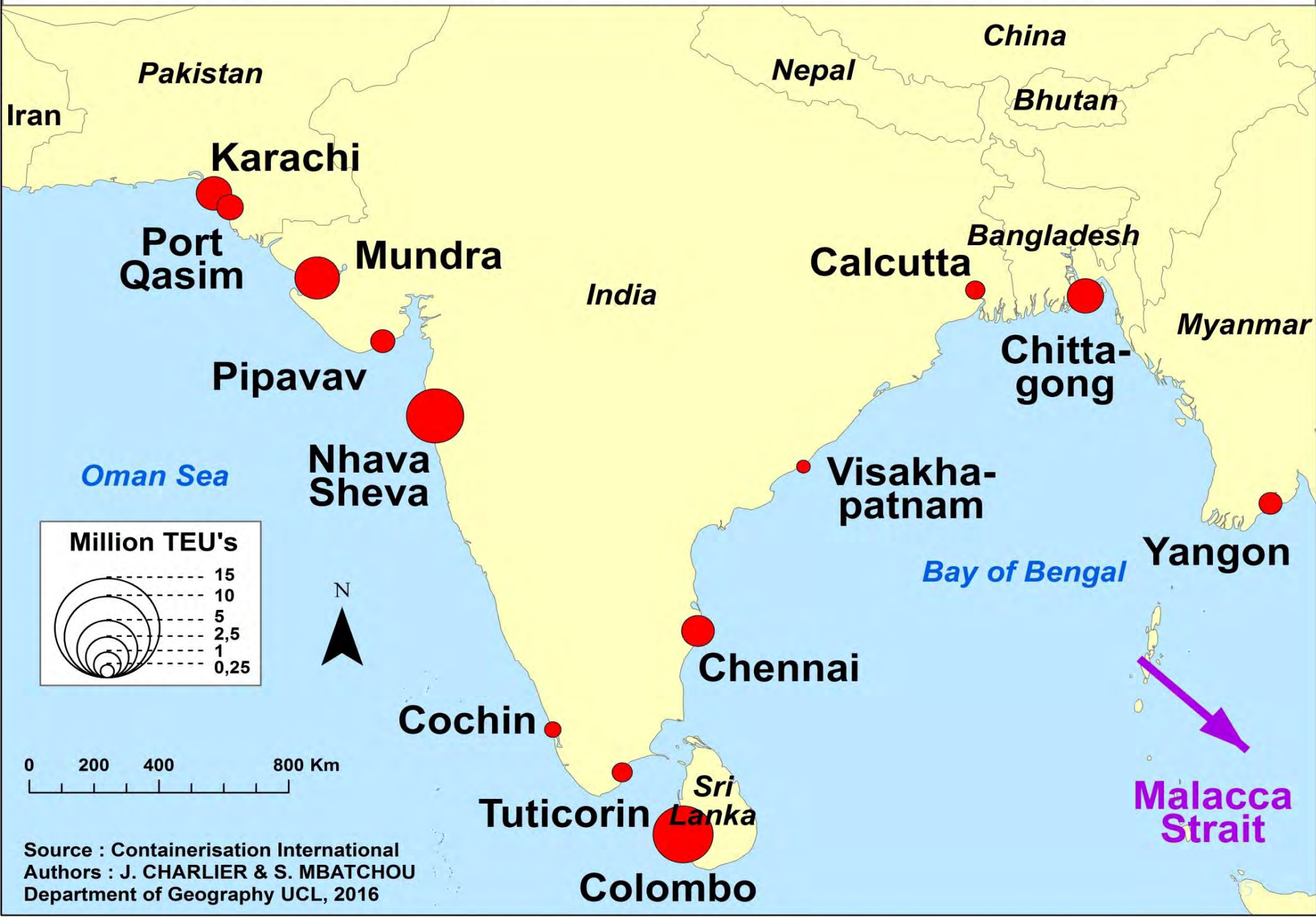
King Abdullah Economic City (Red Sea)



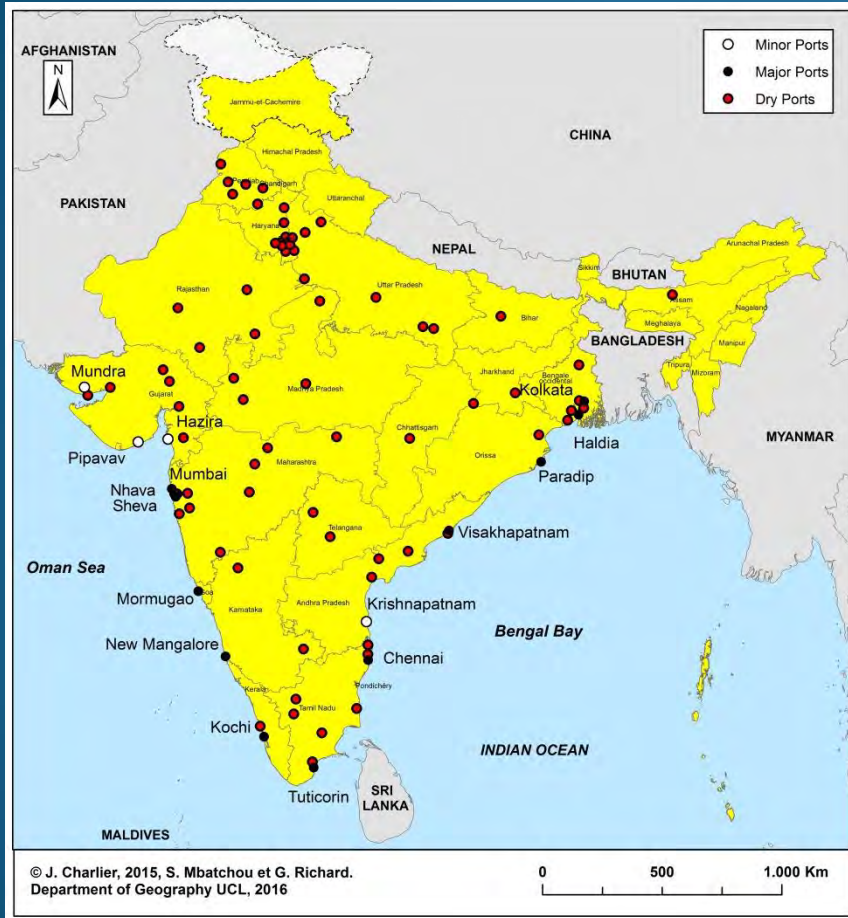
# Container Traffics at South Asian Ports, 1992-2014 (million TEU's)

	1992	2000	2008	2014
Colombo	0.7	1.7	3.7	4.9
Nhava Sheva (JNPT)	0.1	1.2	3.9	4.5
Mundra	XXX	0.0	0.9	2.7
Karachi & Port Qasim	0.5	0.8	1.9	2.7
Other ports	0.9	2.0	4.1	6.9
<b>Sub-total</b>	<b>2.2</b>	<b>5.7</b>	<b>14.5</b>	<b>21.7</b>

# South Asia Container Ports Traffics, 2014



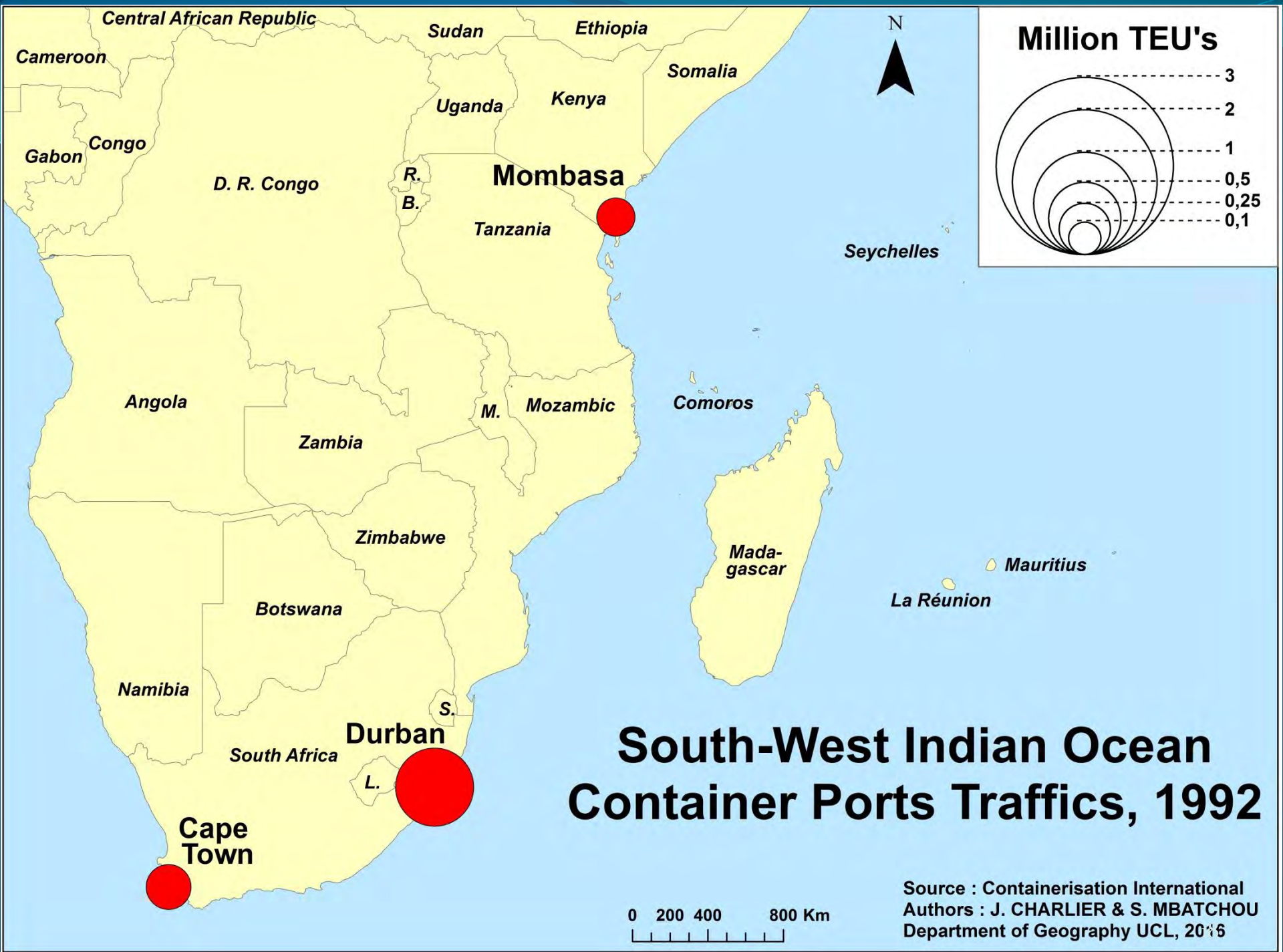
# Some South Asia ports are hinterland ports supported by the world largest network of dry ports, while other ports are playing the transshipment card (or both)

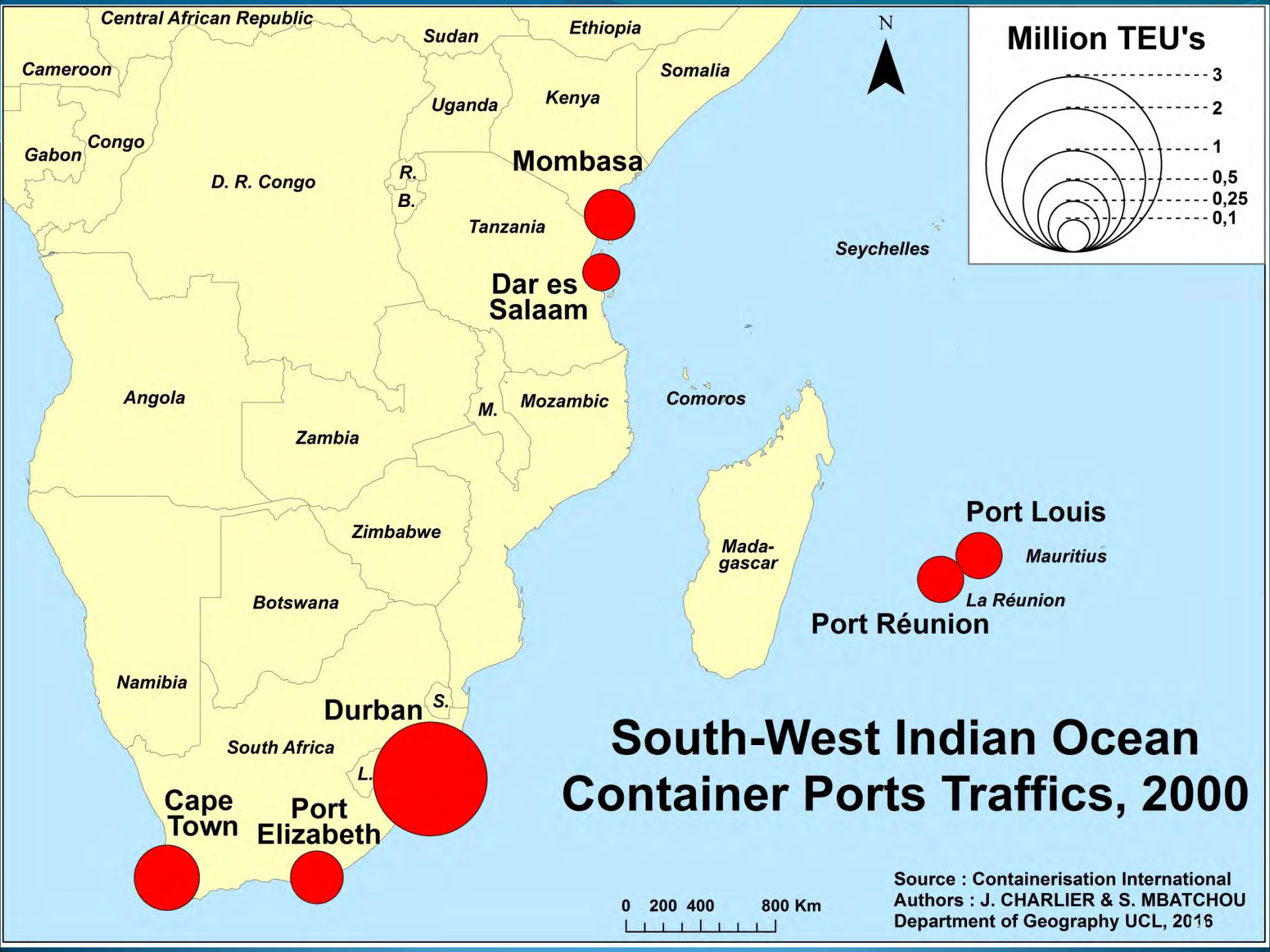


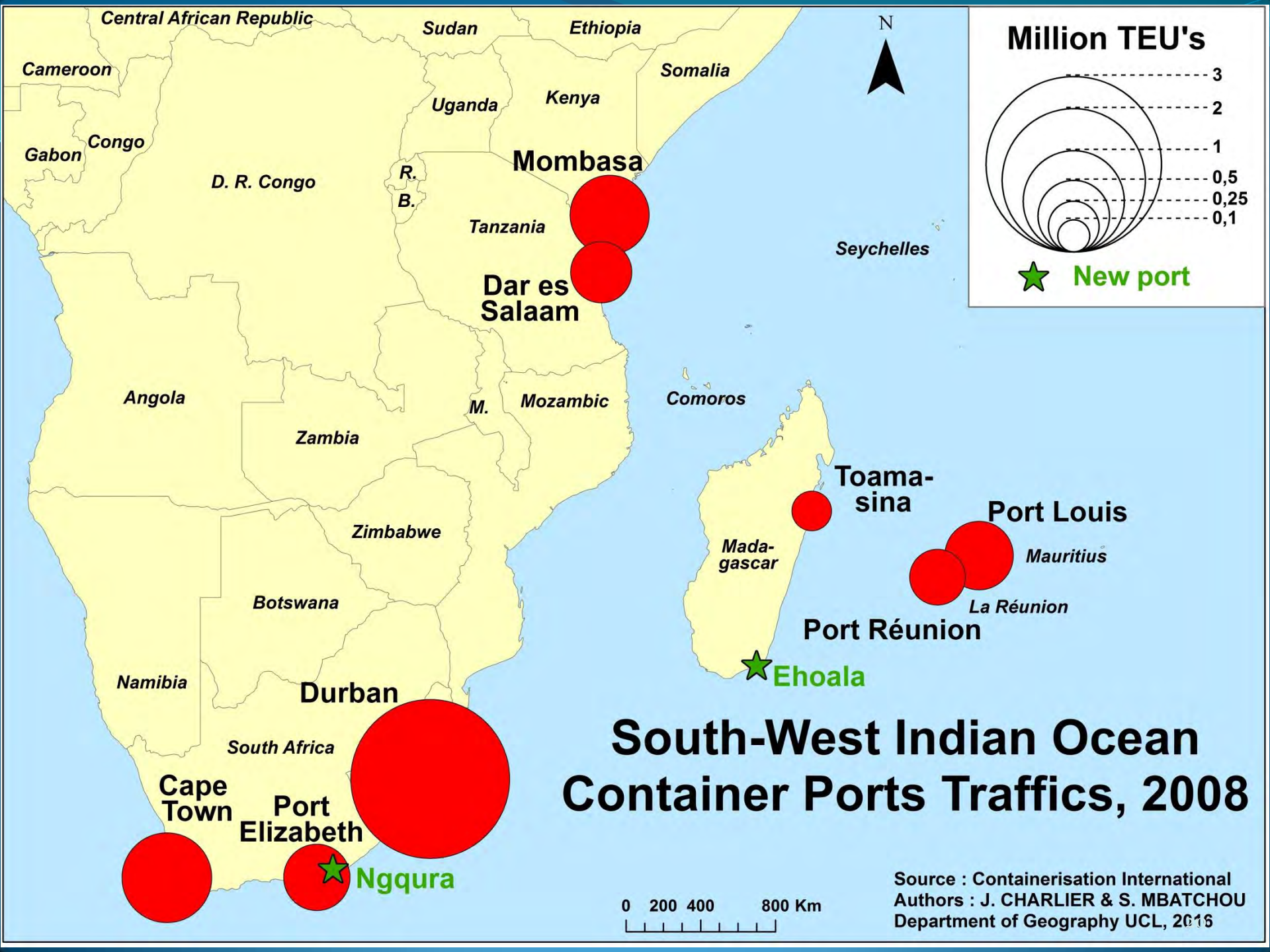


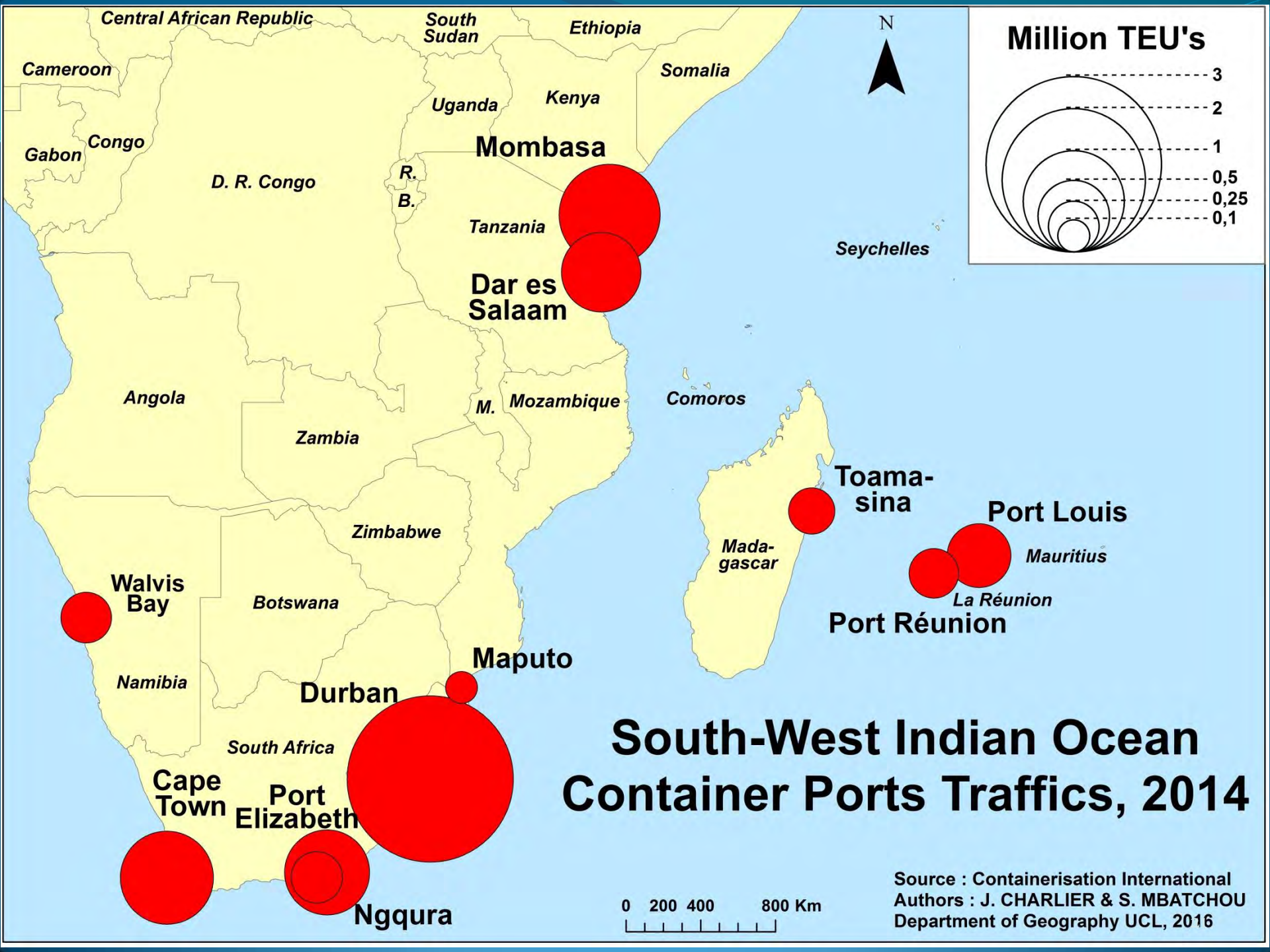
# Container Traffics at SW Indian Ocean Ports, 1992-2014 (million TEU's)

	<b>1992</b>	<b>2000</b>	<b>2008</b>	<b>2014</b>
<b>Durban</b>	<b>0.6</b>	<b>1.2</b>	<b>2.4</b>	<b>2.7</b>
<b>Mombasa</b>	<b>0.1</b>	<b>0.2</b>	<b>0.6</b>	<b>1.0</b>
<b>Cape Town</b>	<b>0.2</b>	<b>0.4</b>	<b>0.8</b>	<b>0.9</b>
<b>Algoa Bay</b>	<b>0.0</b>	<b>0.3</b>	<b>0.4</b>	<b>0.9</b>
<i>(Port Eliz.)</i>	<i>(0.0)</i>	<i>(0.3)</i>	<i>(0.4)</i>	<i>(0.2)</i>
<i>(Ngqura)</i>	<i>XXX</i>	<i>XXX</i>	<i>XXX</i>	<i>(0.7)</i>
<b>Other ports</b>	<b>0.1</b>	<b>0.5</b>	<b>1.2</b>	<b>2.0</b>
<b>Sub-total</b>	<b>1.0</b>	<b>2.6</b>	<b>5.4</b>	<b>7.5</b>



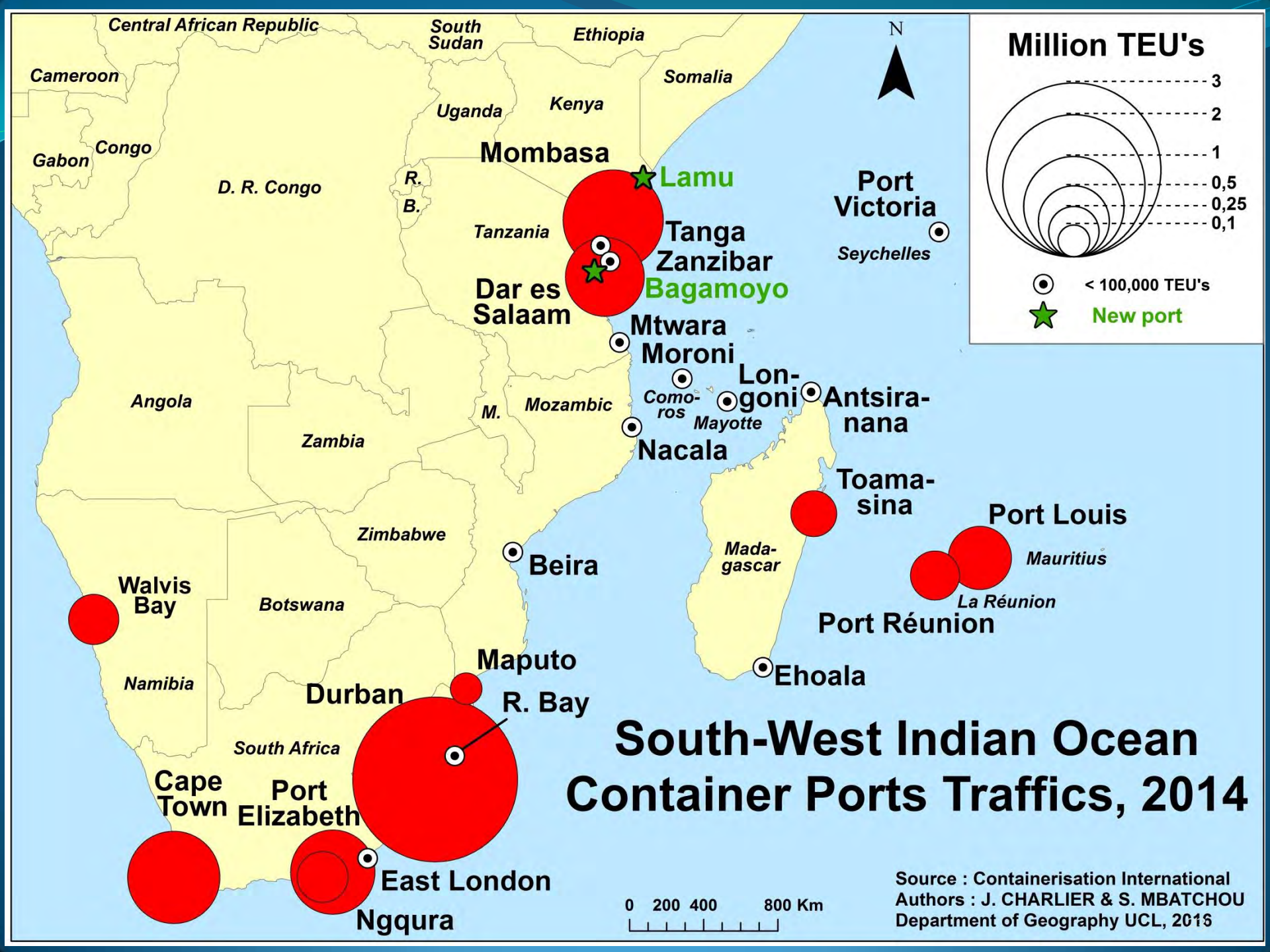






# Container Ports of the SW Indian Ocean with at least 100,000 TEU's in 2014

Southern Africa	Eastern Africa
Durban	Mombasa
Cape Town	Dar es Salaam
<i>Ngqura (Algoa Bay)</i>	
<i>Port Elizabeth (Algoa Bay)</i>	<b>Indian Ocean Islands</b>
	Port Louis
Walvis Bay	Port Réunion
Maputo	Toamasina



# The Regional Leadership of South African Ports

**Durban is currently saturated**



**A new port for Durban in 2025 or so ?**



**A transshipment hub at Ngqura**



**Cape Town has limited room for growth**





# Containerized goods are not the only goods handled at South African seaports (total traffic, 2014)

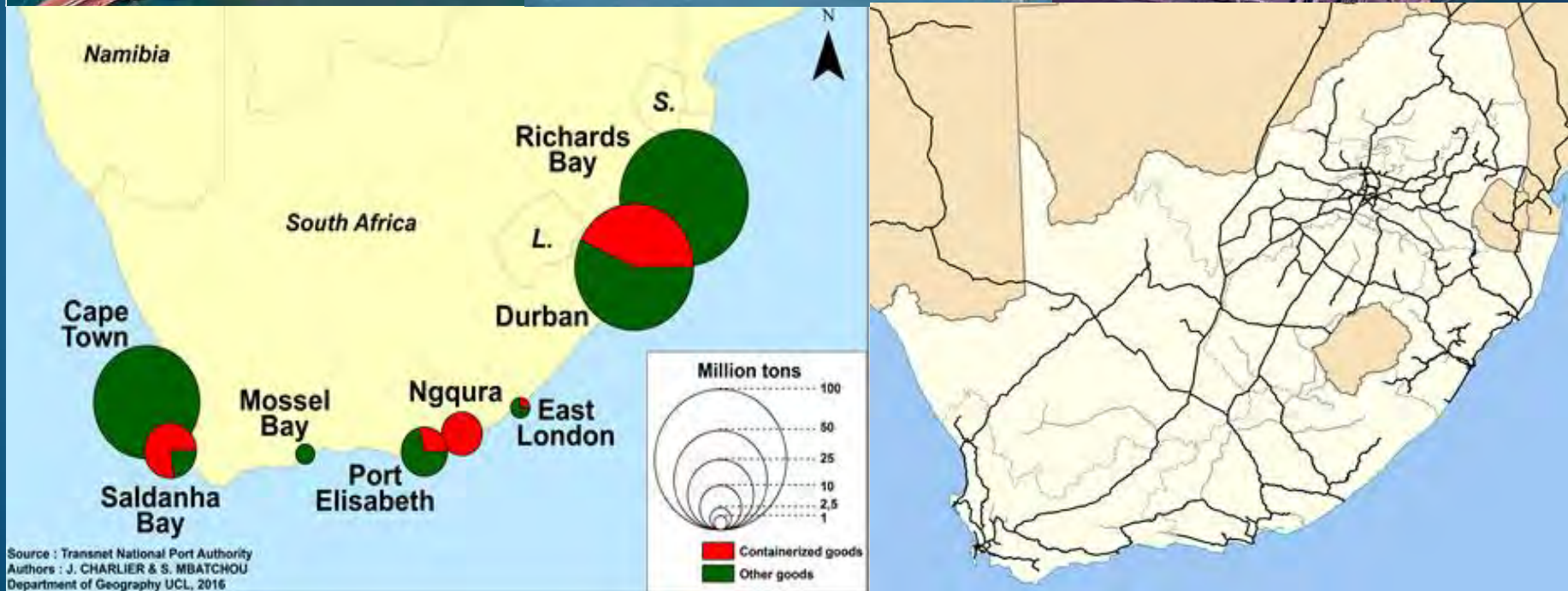
Saldanha Bay = iron ore



P Elizabeth = manganese



Richards Bay = coal



# The Rise of East African Ports (with two new ports on the horizon)

A new container terminal for Mombasa



Dar es Salaam has limited space



A new port at Lamu (Kenya)



A new port at Bagamoyo (Tanzania) ?



# The Rise of (Transshipment) Ports on IO Islands

## (1) Port Louis, Mauritius

405,000 TEU's in 2014 and a target of 1 million in 2025



Mauritius Container Terminal  
Berth length: 560m  
Depth: 14.0m  
Gantry cranes: 5

# The Rise of (Transshipment) Ports on IO Islands

## (2) Toamasina, Madagascar

205,000 TEU's in 2014 and a target of 425,000 TEU's in 2020



# The Rise of (Transshipment) Ports on IO Islands

## (3) Port Réunion, La Réunion (France)

225,000 TEU's in 2014 and a target of 400,000 TEU's in 2018

Port Réunion Container Terminal  
Berth length: from 480 to 640m  
Depth: from 12,1 to 15,5m  
Gantry cranes: 4 (-) + 2 (+)



# A short conclusion

- (1) A dramatic growth of container traffics at Indian Ocean ports between 1992 and 2014 (but not « Chinese style)
- (2) Only one port (Dubai) with more than 10 million TEU's, with another three between 4 and 5 million (Colombo, Nhava Sheva/JNPT and Djeddah)
- (3) Durban is by far the largest in the South West IO and will probably remain it (with or without new port at the former airport site)
- (4) Several recent new ports and other are planned
- (5) Many ports, large or small, are chassing for the same transshipment market in each of the three parts of the IO