



# Ports: Trend and Opportunities

18<sup>th</sup> July, 2023

Maritime Advisors

PRIVATE & CONFIDENTIAL

Presentation by:

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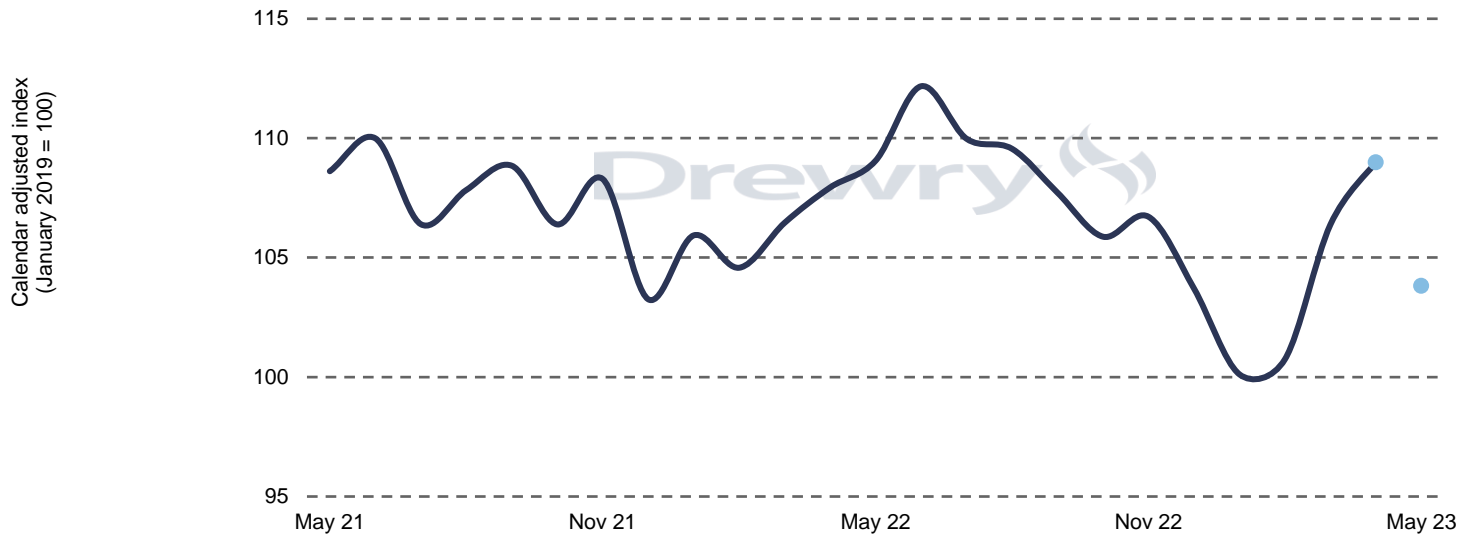
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## Global Ports Monitor

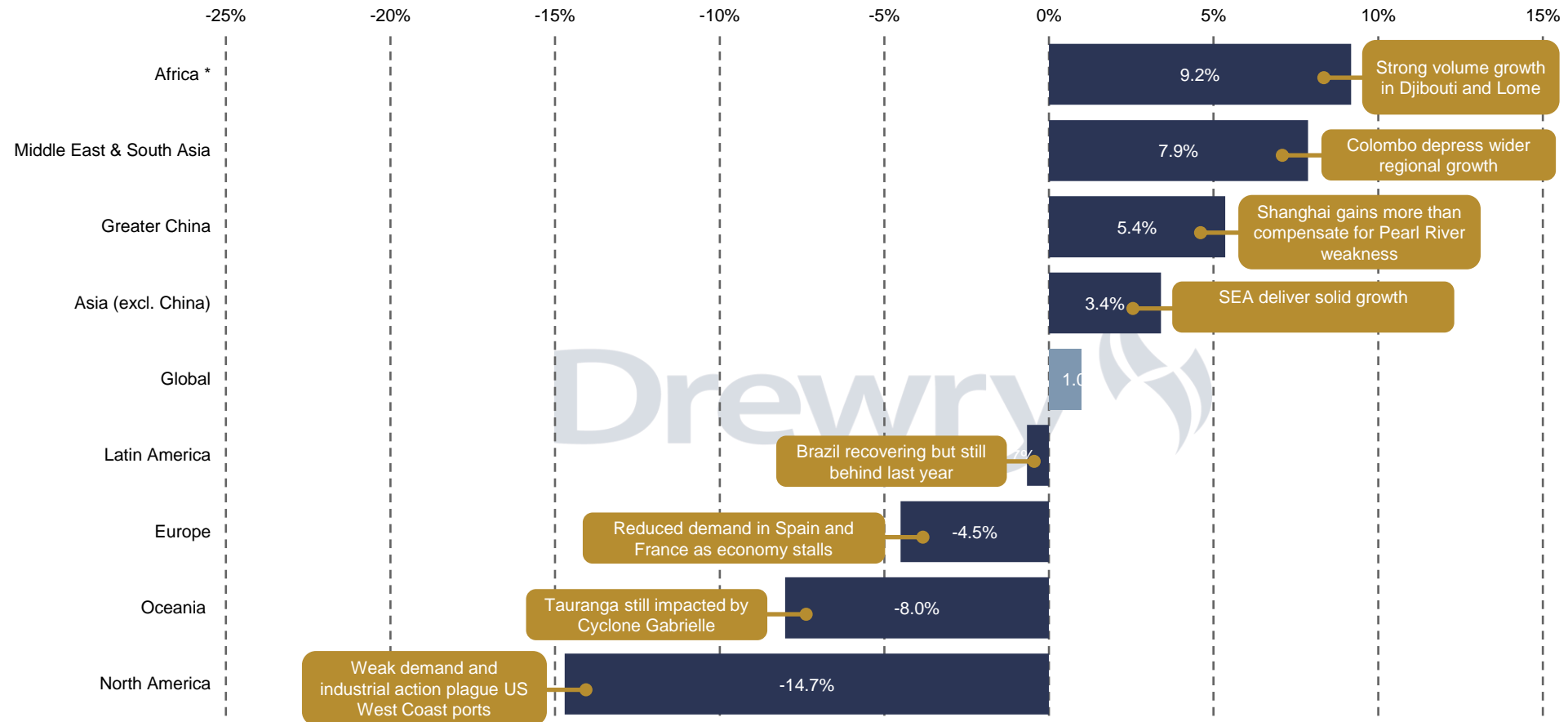


# Drewry Global Container Port Throughput Index



- Index peaked in June 2022
- CNY fell much earlier in 2023
- Rebound in recent months

# Regional summary - growth decline in throughput, April 2023 vs April 2022



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

# Mainland China (Jan-May 2023)

Top 8 foreign trade ports (including Xiamen)

	Jan-May 2023 vs 2022	May 2023 vs 2022
Domestic	11.8%	9.0%
Export Laden	-2.6%	-1.0%
Import Laden	-0.7%	1.4%
Feeder	16.4%	20.2%
Foreign Empty	1.2%	7.7%
<b>Total</b>	<b>3.5%</b>	<b>5.5%</b>

**North (Qingdao, Tianjin, Dalian)**

Foreign laden  
 ↗ Export: +7.9%  
 Import: +7.0%

**Central (Shanghai, Ningbo-Zhoushan)**

Foreign laden  
 ↘ Export: -2.1% (2022 Jan –May 2.9%)  
 Import: -3.9%

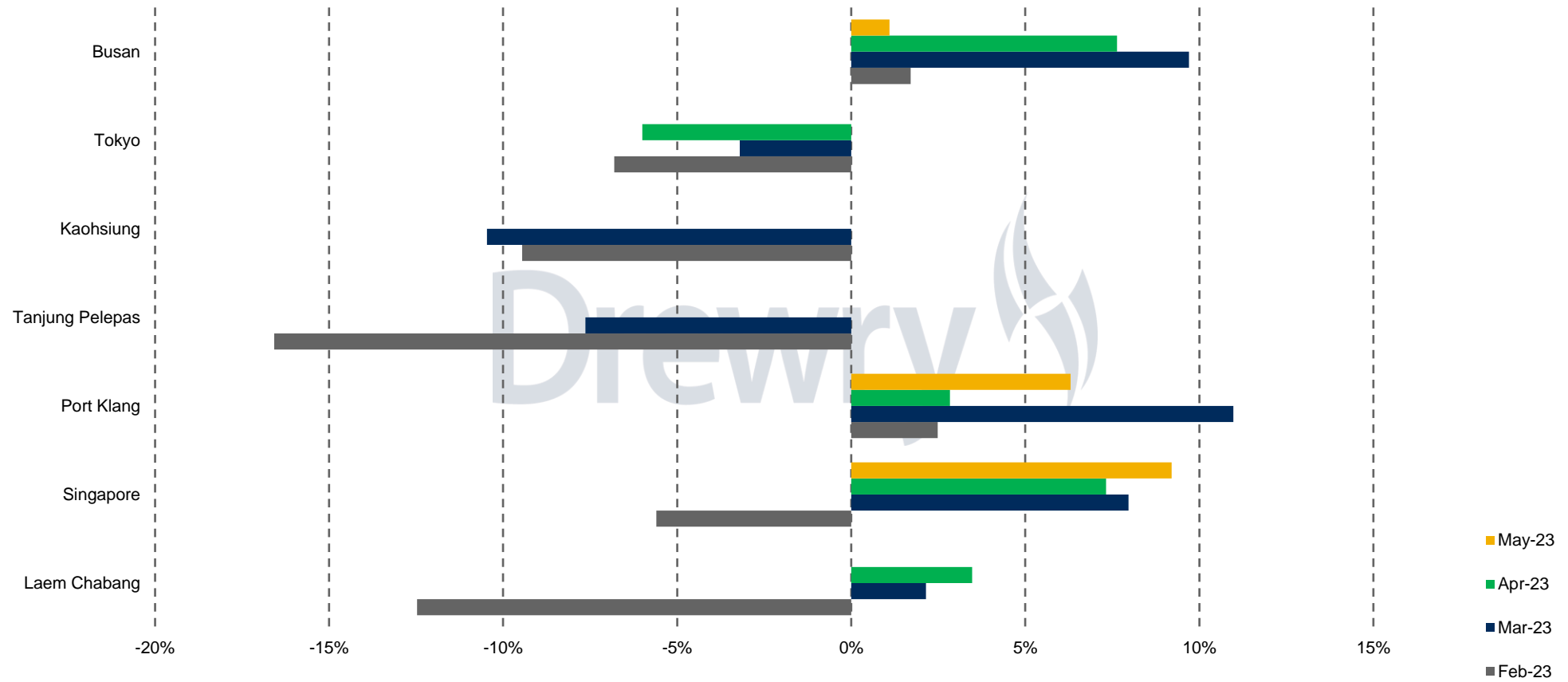
**South (Shenzhen, Guangzhou)**

Foreign laden  
 ↘ Export: -10.4% (2022 Jan –May 6.1%)  
 Import: -3.9%

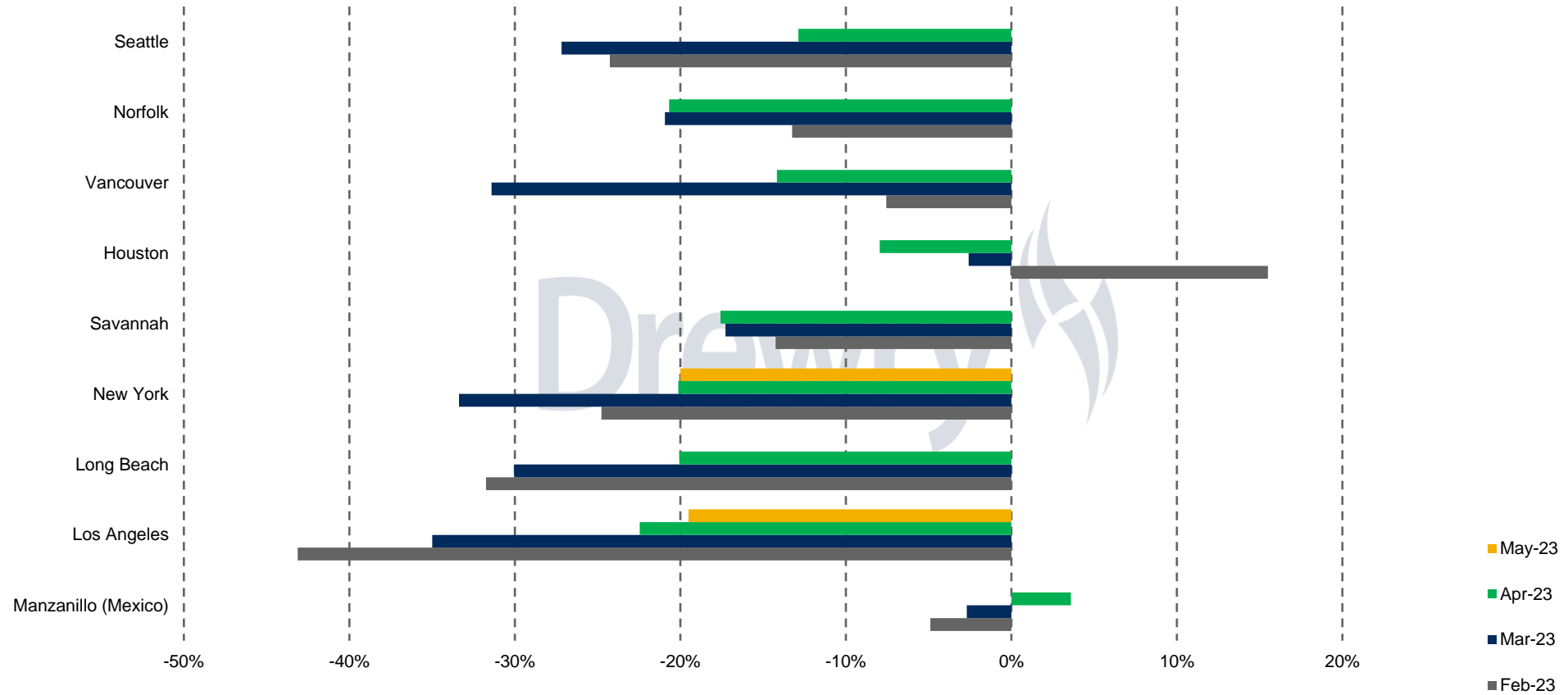
# China Trade data

Trade value (USD)					
	Jun 2023 vs 2022	Jun 2022 vs 2021	Jan-Jun 2023 vs 2022	Jan-Jun 2022 vs 2021	CAGR Jan-Jun 2019-2023
Export	-12.4%	17.0%	2.2%	13.8%	9.5%
Import	-6.8%	0.0%	-6.7%	5.6%	6.0%
Total	-10.1%	9.3%	-4.2%	10.1%	7.9%

# Other Asian Ports

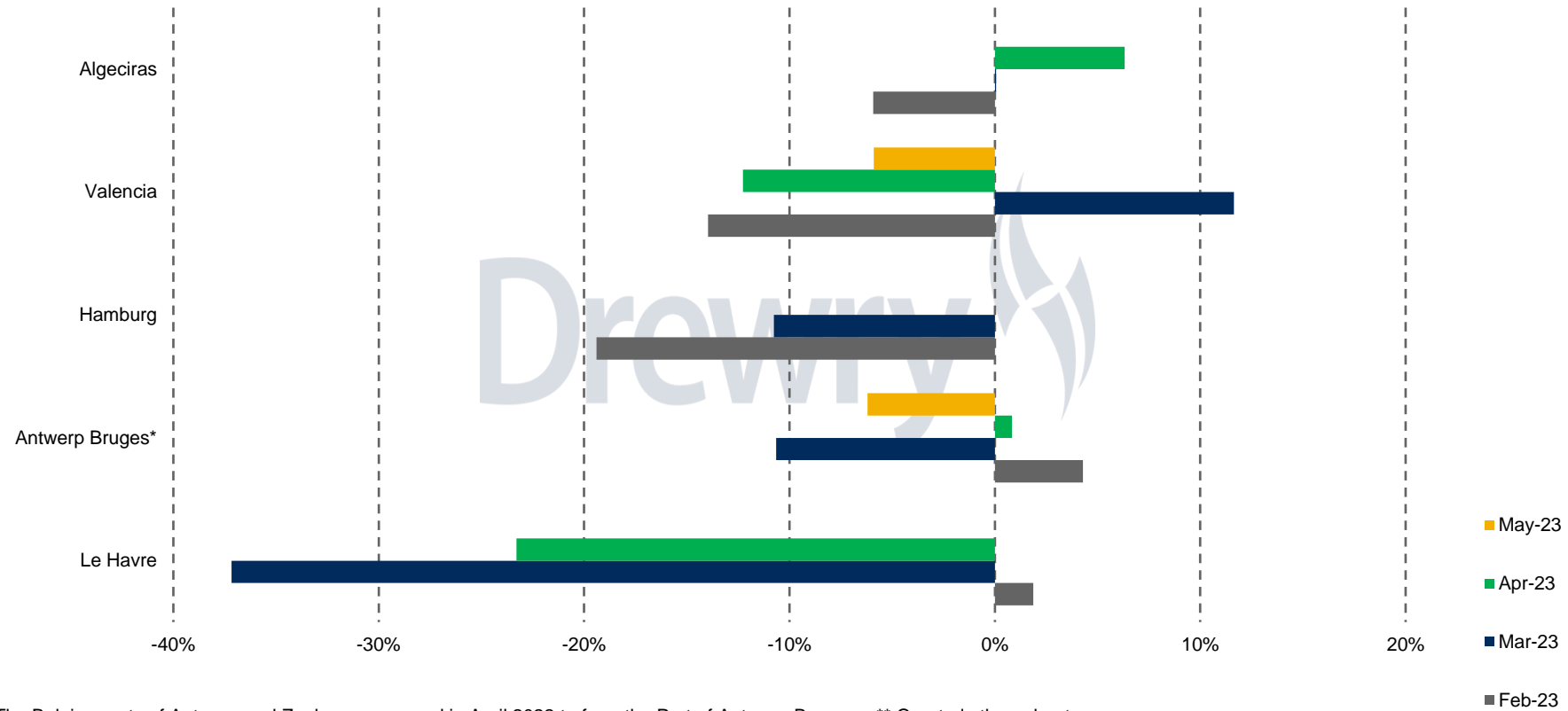


# North American Ports





# European Ports



\* The Belgian ports of Antwerp and Zeebrugge merged in April 2022 to form the Port of Antwerp-Bruges. \*\* Quarterly throughput.

## Container market growth hotspots: % growth 2022 vs. 2019



Note: some growth rates are estimated based on YTD handling.

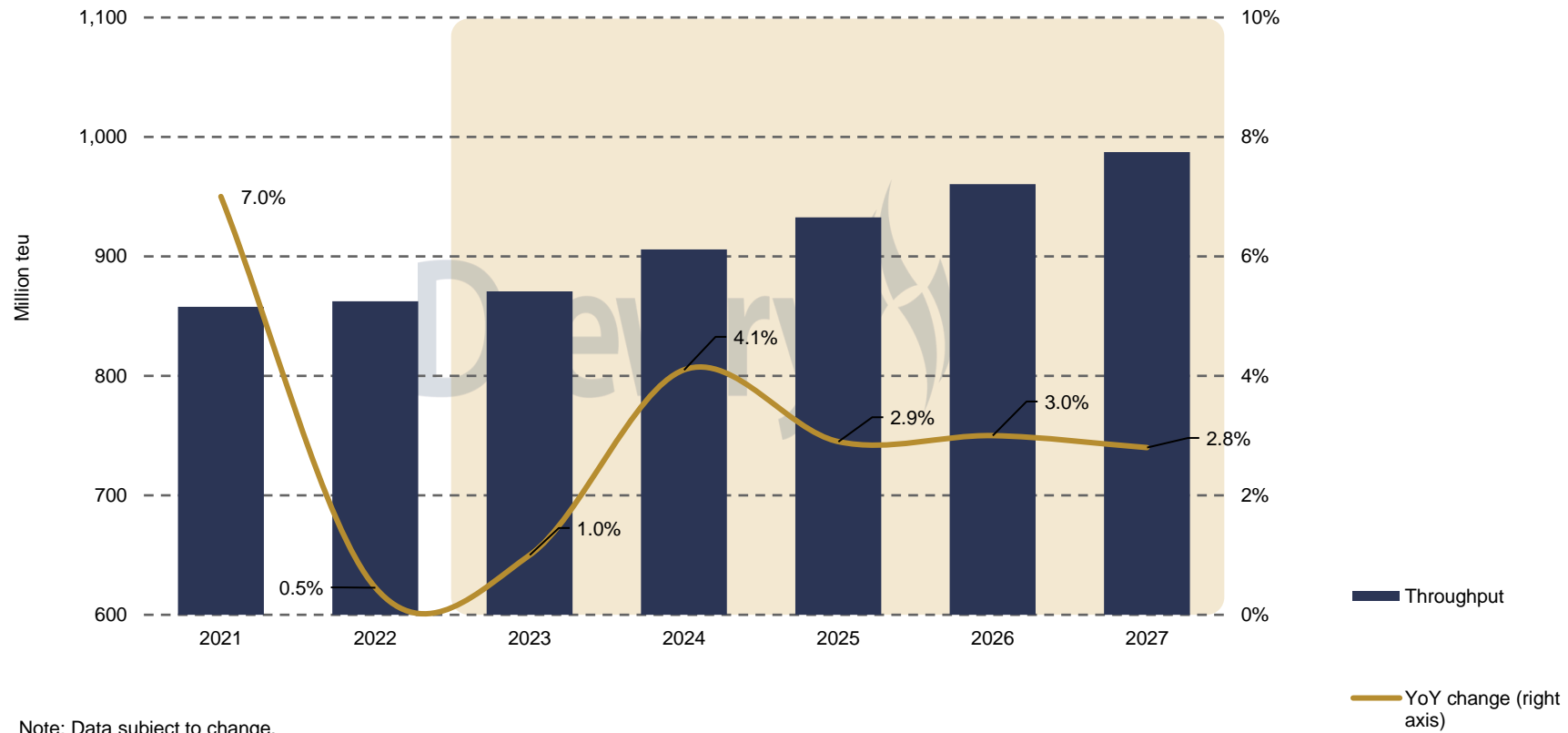
- Supply chain diversification drives port volume growth in Southeast Asia, Northwest India and Mexico
- Rail investment increases size of port hinterland market



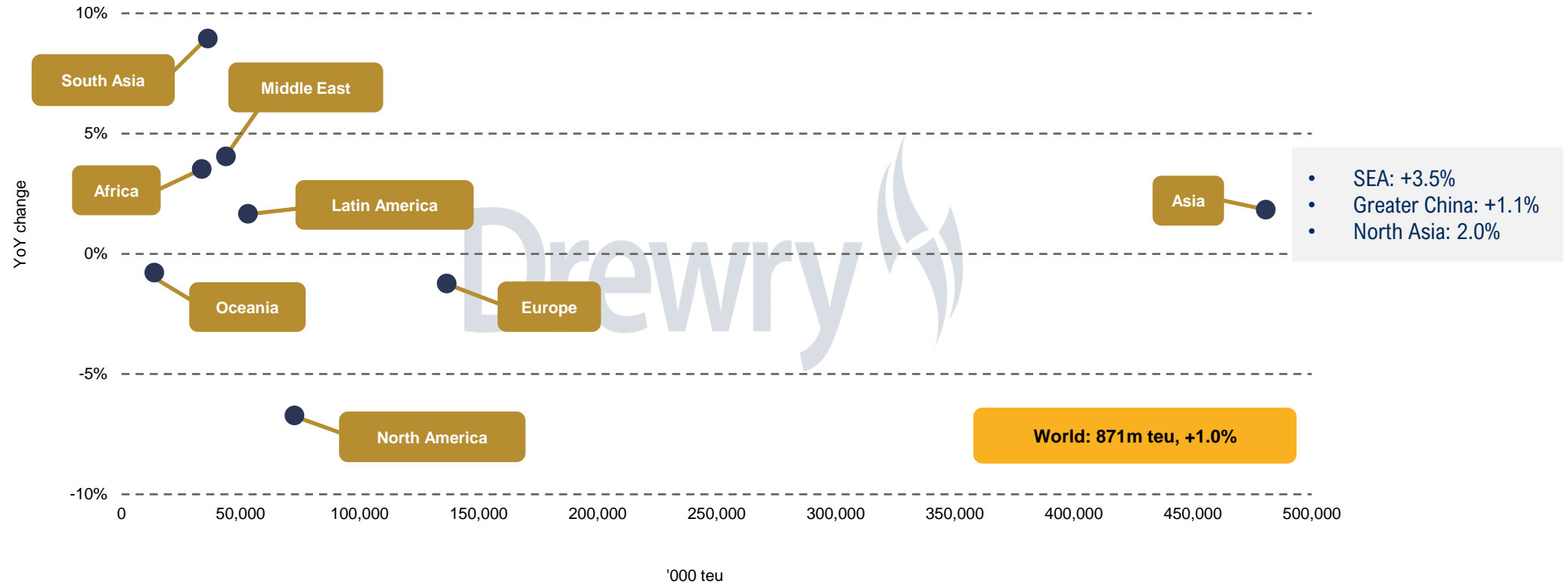
## High growth container markets & Opportunities



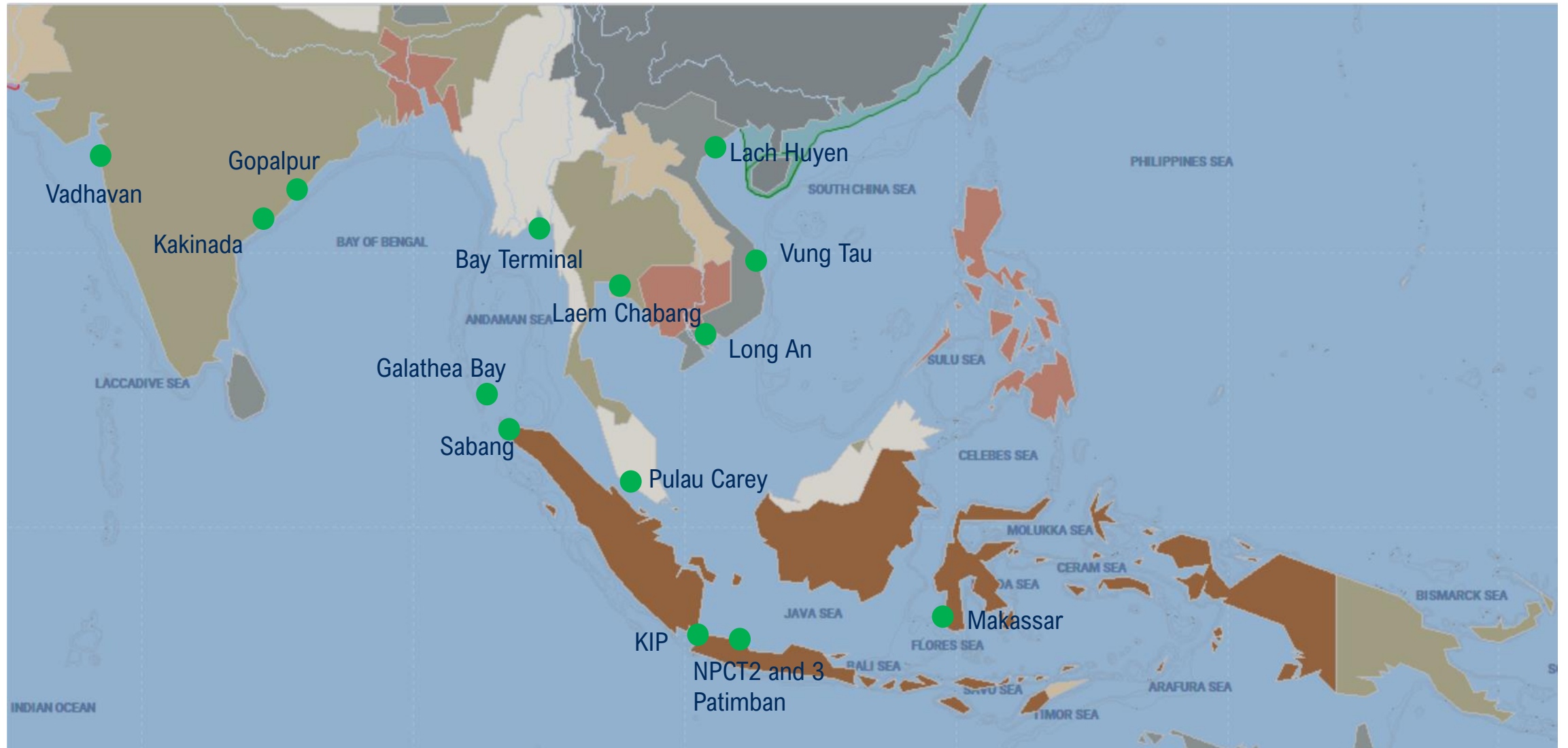
# Global container port throughput



# Drewry container forecast, 2023



# Port investment opportunities – SEA & SA





**About Drewry**



# Principal source of material for this sharing

## Drewry Ports and Terminals Insight

- Quarterly report offering:
  - Spotlight analysis: thought leadership
  - Port connectivity index
  - Global Ports Monitor
  - Regional Ports Monitor
  - Deals and developments
  - Port sector financial analysis
- Monthly supplement providing enhanced global and regional data
  - Port Throughput Indices, Port Call Indices
  - Port Performance Indices, Port Congestion Trackers

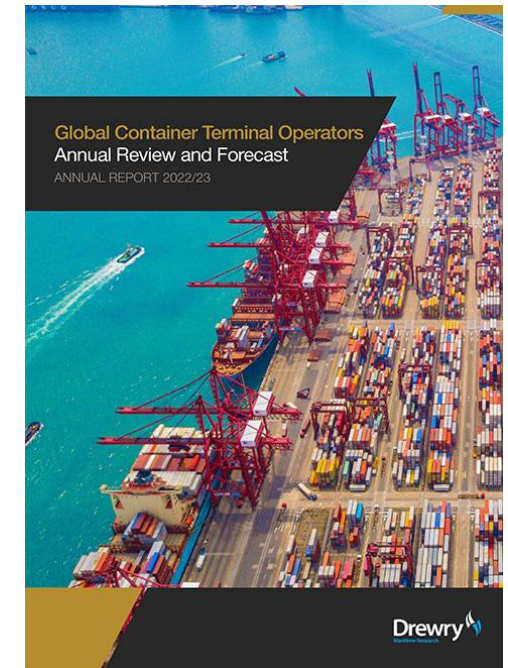


## Global Container Terminal Operators Annual Review and Forecast 2022/23

- Terminal industry structure and performance
- League tables and performance of terminal operators
- Operator strategies, portfolios and risk profiles
- Forecast capacity by terminal operator & region to 2026
- Individual analysis of more than 30 terminal operators and investors

## 全球集装箱海运市场月报

- 集运市场月度热点
- 全球及中国经贸概览
- 全球船队
- 分航线运量及运力分析
- 全球及中国港口动态 (吞吐量、航线变化、等泊船舶数量、等泊时间)





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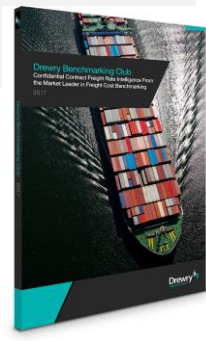
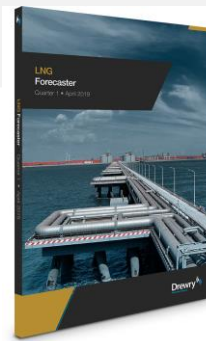
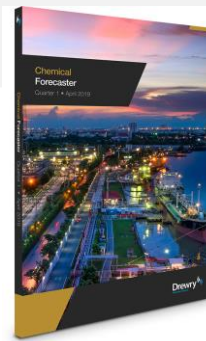
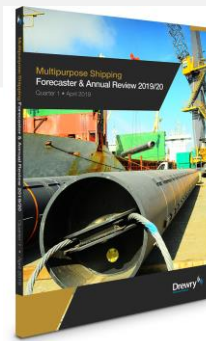
- Containers
- Dry Bulk Shipping
- Ports and terminals
- Tanker Shipping (Product/Crude)
- Chemical Shipping
- LNG / LPG
- Multipurpose Shipping
- Ship Operations
- Reefer

### RESEARCH TYPES

- Monthly market insights
- Quarterly market forecasts
- Annual sector reviews and forecasts
- Spotlight analysis/Special situations
- Impact analysis

### AUDIENCES SERVED

- Ship owners and operators
- Importers/exporters
- Banks/Financial Institutions
- Port Authorities/Technical operators
- Equipment manufacturers
- Government agencies
- Investors



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