

ISL Monthly Container Port Monitor

Executive Summary

Development of the world's top container ports by region

During the second quarter of 2005, the TEU traffic of the top world ports included in the ISL traffic analysis stood at 53.5 mill TEU. Compared with the previous quarter this is an increase of 8.2 per cent. Looking at the same quarter last year, traffic increased by 8.3 per cent, whereby the regional growth patterns show different developments.

America

Looking at North American ports, TEU traffic increased by 9.8 per cent to 8.9 million TEU, comparing results for the second quarter of 2005 and 2004. In comparison to the first quarter of 2005, TEU traffic increased by 9.5 per cent. This is the highest growth compared with all regions. Traffic growth of the North American Pacific coast ports was higher than on the Atlantic coast (12.7 per cent and 5.0 per cent respectively). The highest increases of all North American ports compared with the second quarter of 2004 showed the ports of Long Beach and Vancouver with 19.7 per cent and 19.6 per cent respectively.

Asia

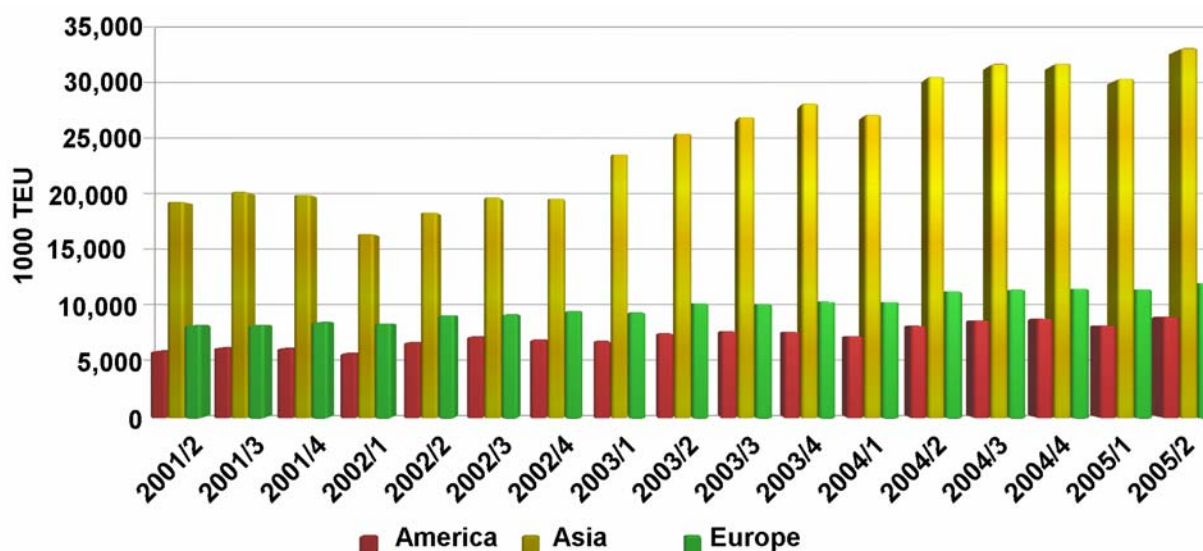
Compared with the second quarter of 2004, all Asian ports included in the here showed a traffic growth of 8.4 per cent. Only the ports of Shanghai, Shenzhen, Incheon, Dubai and Nagoya show double digits growth rates. Highest increases show the ports of Shanghai (+26.6 per cent), Incheon (+ 23.5 per cent), Nagoya (+ 21.0 per cent) and Shenzhen (+ 20.4 per cent), as well as Dubai and Singapore. These ports showed increases of 18.6 per cent, 9.3 per cent respectively. The Ports of Hong Kong, Kaohsiung, Keelung, Gwangyang, Yokohama and Kobe show negative growth trends.

Europe

Compared with American and Asian ports, the European ports showed the smallest traffic growth, compared with the first quarter of this year their TEU traffic increased by 5.2 per cent. But growth tendencies are not equal for all ports. Looking at the North Range, Rotterdam showed the best result compared with the second quarter of last year realizing a traffic increase of 13.0 per cent. Hamburg's traffic increased of 12.0 per cent and Antwerp of only 3.5 per cent. TEU traffic of the fourth ranking port in the North Range, the port of Bremen/Bremerhaven, increased by 10.7 per cent. All in all, the North Range ports increased their container traffic up to 8.2 mill. TEU equal to a step up of 10 per cent compared with the same quarter last year.

Container traffic of the top Mediterranean ports increased by 0.4 per cent. The port of Pireaus mainly determines this stagnation. Due to a long-time strike of employees of the port, Pireaus only showed 50 per cent of its normal TEU-throughput. Moreover the ports of Gioia Tauro (-6.2 per cent) and Genoa (-6.4 per cent) showed decreases in TEU traffic. With an increase of 20.2 per cent compared to last years figures, the port of Valencia showed the best performance of all Mediterranean sea ports

Quarterly container port traffic by continent January 2001 – June 2005



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Executive summary - Quarterly traffic results of the ports analysed in the "Monthly Container Port Monitor" up to June 2005

ranking: TEU in 2q-2005	ranking: TEU in 1q-2005	Port	Country	change of TEU 2q-2005 over last quarter		% change of TEU over the same quarter of previous year			
				in 1000	in %	3q-'04	4q-'04	1q-'05	2q-'05
American ports									
9	10	Los Angeles	US	212	13	0.4	-2.0	-2.4	-0.4
11	12	Long Beach	US	206	14	28.6	33.4	29.2	19.7
23	23	Oakland	US	31	6	9.6	20.9	20.0	14.5
28	30	Tacoma	US	63	14	1.7	14.2	13.6	14.8
29	26	Seattle	US	7	1	22.3	45.8	39.8	17.4
31	35	Vancouver	Canada	113	31	19.3	11.8	-4.6	19.6
17	15	New York/ New Jersey	US	-23	-3	12.1	15.7	8.7	-2.4
22	24	Santos	Brazil	94	19	18.1	17.3	26.6	17.6
27	28	Charleston	US	33	7	15.0	18.4	11.7	13.4
30	29	Port of Virginia	US	29	6	12.7	9.7	10.8	10.5
32	31	Savannah	US	7	2	10.7	13.9	11.5	11.6
42	41	Montreal	Canada	5	2	12.5	11.5	12.2	1.1
45	45	Montevideo	Uruguay	10	8	17.5	19.6	16.0	24.2
46	46	Sao Francisco	Brazil	-10	-13	27.6	-3.2	9.0	-11.6
Total				777	9.5	12.6	15.3	12.7	9.8
Asian/Oceanian ports									
2	2	Hong Kong	China	481	481	12.4	5.8	3.4	-3.4
3	3	Shanghai	China	649	16	28.8	18.7	29.1	26.6
4	4	Shenzhen	China	370	11	36.8	23.4	26.8	20.4
5	5	Busan	South Korea	149	5	12.7	13.8	7.1	3.6
6	6	Kaohsiung	Taiwan	150	6	11.0	7.1	0.1	-1.7
25	27	Keelung	Taiwan	60	12	2.6	-2.4	-1.7	-1.4
39	40	Gwangyang	South Korea	24	8	-1.7	-6.5	-15.6	-9.4
43	43	Incheon	South Korea	49	21	12.8	22.9	22.3	23.5
1	1	Singapore	Singapore	331	6	16.7	14.1	14.2	9.3
37	36	Sydney	Australia	0	0	14.3	10.2	8.9	1.8
10	9	Dubai	UAE	128	7	25.7	26.2	26.5	18.6
13	13	Laem Chabang	Thailand	43	5	12.4	10.7	7.3	8.3
18	18	Yokohama	Japan	86	13	11.8	5.7	4.0	-0.3
19	19	Nagoya	Japan	114	20	12.0	10.4	5.5	21.0
21	20	Kobe	Japan	40	7	17.3	8.3	-1.4	6.5
38	39	Bangkok	Thailand	7	2	16.9	8.7	1.4	-1.4
40	42	Taichung	Taiwan	20	7	-0.1	-0.1	-2.8	0.6
36	37	Nhava Sheva	India	6	2	-2.3	-5.5	5.9	6.1
Total				2708	9.0	17.6	12.6	11.8	8.4
European ports									
7	7	Rotterdam	Netherlands	113	5	19.0	20.9	19.6	13.0
8	8	Hamburg	Germany	124	7	13.5	11.1	12.9	12.0
12	11	Antwerp	Belgium	118	8	9.2	6.7	3.0	3.5
14	14	Bremen / Bremerhaven	Germany	49	6	13.2	18.7	14.5	10.7
24	22	Le Havre *	France	17	3	6.5	11.2	12.4	4.3
33	32	Dublin	Ireland	12	3	5.9	6.1	4.5	7.3
35	38	Zeebrugge	Belgium	37	11	16.9	19.8	20.1	24.1
16	16	Gioia Tauro	Italy	1	0	11.3	10.0	7.4	-6.2
15	17	Algeciras-La Linea	Spain	52	7	24.3	13.9	13.2	8.1
20	21	Valencia	Spain	86	16	12.6	1.0	13.5	20.2
26	25	Barcelona	Spain	36	7	13.3	10.7	12.3	10.4
34	34	Genoa	Italy	15	4	6.4	-5.5	-1.0	-6.4
41	33	Pireaus	Greece	-85	-22	-5.0	-5.2	-6.4	-29.3
44	44	Marseilles	France	12	5	12.7	3.9	-1.1	2.5
Total				587	5.2	12.7	11.0	10.6	6.8
Total of all Ports listed in the MCPM (a)				4072	8.2	15.6	12.7	11.7	8.3