

THE EUROPEAN AND MEDITERRANEAN CONTAINERPORT MARKETS TO 2015

The pace of growth in the European and Mediterranean containerport markets has been truly dynamic in recent years. This has been driven by the globalisation of the world economy, the introduction of much larger vessels into the deep-sea trades – with associated rapid feeder demand growth – and also strong expansion in intra-regional trades.

OSC has been actively involved in many major projects in these markets in the recent past; this new study provides a complete update and reappraisal of the market situation and anticipated conditions in the coming decade.

The outlook is for continued sustained demand growth, with the strongest rates of growth focused in the eastern parts of the region – in the Baltic and Black Sea markets and in Turkey. However, the pace of expansion will be steady and positive in the more established markets also.

The major regions covered in this study are:

North Europe:

- North Continent
- British Isles
- Scandinavia
- East/South Baltic

South Europe and Mediterranean:

- European Atlantic
- West Mediterranean
- Central Mediterranean
- East Mediterranean and Black Sea.

Transshipment has been a major aspect of world containerport demand in recent years. This report provides detailed analysis and forecasts of the development of regional transshipment markets and examines the driving forces in each transshipment region.

On the supply side, the position of current investment projects and plans is reviewed in detail. The resultant prospective development of port capacity is quantified to 2015. This provides the basis for comparing demand and supply to 2015, in order to identify potential surplus capacity or shortfalls. The level of capacity utilisation will indicate the likely direction of container handling prices.

Containerport productivity is analysed by country, in terms of TEUs per metre of container quay, and TEUs per quayside container gantry crane.

CONTENTS

SECTION 1 INTRODUCTION AND EXECUTIVE SUMMARY

This provides a comprehensive summary and conclusions for the study.

SECTION 2 DRIVING FORCES AND STRATEGIC ISSUES

The Section reviews the broad macroeconomic framework within which trade in containerised goods has expanded. After four decades of expansion, can the containerised trades continue their pattern of rapid growth? This Section seeks to address this question by analysing factors which could limit expansion.

The changing structure of the containerport industry is also considered, covering such issues as increasing vessel size and port depth, transshipment, the role of international stevedoring companies and carriers in terminal operation, as well as carrier alliances and regional shipping trends.

SECTION 3 DEVELOPMENT OF REGIONAL CONTAINERPORT DEMAND

Detailed analysis of the development of containerport demand in Europe and the Mediterranean is provided in this Section. Demand trends are analysed by port for the following port regions:

North Europe

- North Continent West, comprising ports in France, Belgium and the Netherlands.
- North Continent East: comprising the German North Sea ports.
- British Isles: UK and Republic of Ireland.
- Scandinavia: Finland, Sweden, Denmark, Norway and Iceland.
- Other Baltic: Baltic Russia, Lithuania, Latvia, Estonia, Poland and Baltic Germany.

South Europe and Mediterranean

- European Atlantic: Atlantic France, Northwest Spain, Portugal, Canary Islands and other Atlantic islands.
- West Mediterranean: South and East Spain, Mediterranean France, Morocco and Algeria.
- Central Mediterranean: Italy, Malta, Slovenia, Croatia, Serbia and Montenegro, and Tunisia.
- East Mediterranean and Black Sea: Greece, Romania, Bulgaria, Ukraine, Black Sea Russia, Georgia, Turkey, Cyprus, Mediterranean Israel, Lebanon, Syria and Mediterranean Egypt.

The evolution of regional container transshipment markets is also summarised in this Section, for both the North European and South European/Mediterranean containerport markets.

SECTION 4 CONTAINERPORT DEMAND FORECASTS TO 2015

The historical relationships between growth in GDP and that in import/export container handling demand for the port ranges/countries of North Europe and the South Europe/Mediterranean port regions are examined in this Section. A framework is established for the two economic cases, which are used in forecasting containerport demand in the report. GDP forecasts to 2015 are provided by country or relevant economic area.

Containerport demand forecasts are presented for each country or port range:

- Import/export container handling demand forecasts are based on the anticipated relationship with GDP growth,
- Transshipment demand forecasts are derived from their anticipated relation to the aggregated import/export demand of each sub-region.

This Section also forecasts the distribution of Russian-generated containerport demand between Baltic ports.

SECTION 5 CONTAINERPORT INVESTMENT PLANS TO 2015

Port investment is continuous in most of Europe and the Mediterranean, to cope with the year-on-year growth in container trade. The East Baltic, East Mediterranean and Black Sea are the most recent regions to become adsorbed in accelerating containerport development.

The Section presents a comprehensive review of current containerport investment projects, which provides the basis for a reasonable indication of future capacity development to 2015.

SECTION 6 CONTAINERPORT CAPACITY AND SUPPLY/DEMAND FORECASTS TO 2015

By aggregating the planned capacity additions from the foregoing Section, the implied development of container handling capacity at regional ports is detailed here.

The anticipated supply/demand balance for container handling is quantified in terms of forecast port capacity and throughput to 2015. From this, indications of future port utilisation are derived, and likely areas of excess capacity or shortfall are identified.

SECTION 7 CONTAINERPORT PRODUCTIVITY BY COUNTRY AND PORT RANGE

This Section analyses the development of containerport facilities by country, in terms of the length of quayage devoted to container handling and the number of quayside container gantry cranes.

This development is compared with throughput to reveal the implied average productivity per metre of container quay and per container gantry crane, for each country and port range.

ORDER FORM

Please complete and return - *with payment* - to:

Study Sales Department
Ocean Shipping Consultants Limited
Ocean House, 60 Guildford Street
Chertsey, Surrey KT16 9BE, England
Tel: 01932 560332 (international +44 1932 560332)
Fax: 01932 567084 (international +44 1932 567084)
Email: info@osclimited.com Website: www.osclimited.com



Please send me.....copy/ies of

THE EUROPEAN AND MEDITERRANEAN CONTAINERPORT MARKETS TO 2015

- Printed version: Price £785, €1175 or US\$1490 each - includes delivery by courier
 Electronic (PDF) version: Price £785, €1175 or US\$1490 each.
 Printed & Electronic (PDF) versions: Price £865, €1295 or US\$1650.
 I enclose a cheque/bank transfer for £..... or €..... or US\$.....

Make cheques payable to **Ocean Shipping Consultants Ltd.**

Bank Details: Barclays Bank plc, PO Box 673, Town Gate House, Church Street East,
Woking, Surrey GU21 1XW, UK. Account No. 20673919. Bank Sort Code 20-90-56.
IBAN GB45 BARC 209056 20673919

Please debit my credit card no.

Visa Access Amex Diners Euro/Master

Expiry date Signature.....

Please invoice me.

Name

Position

Company.....

Address

.....

.....

.....

Tel..... Fax.....

Email.....

V.A.T. No. (EU only)..... *A receipt will be enclosed with your copy/ies.*

THE EUROPEAN AND MEDITERRANEAN CONTAINERPORT MARKETS TO 2015

THE EUROPEAN AND MEDITERRANEAN CONTAINERPORT MARKETS TO 2015

is one of a series of highly detailed studies published by **Ocean Shipping Consultants Ltd** about container shipping, ports and associated markets. Among other recent titles are:

'Marketing of Container Terminals'

'Refrigerated Trades and Outlook to 2015'

'World Containerport Outlook to 2015'

'Containerisation in the Americas to 2015'

'The East Asian Containerport Market to 2015'

'Shipping Profitability to 2015'

Further details of all publications and major consultancy projects undertaken by Ocean Shipping Consultants Ltd are available on request.



A review of:

- Containerport Demand and Developments by Port
- Forecast Demand to 2015 by Country/Port Range
- Investment Projects and Plans
- Regional Transshipment Markets and Forecasts
- Anticipated Supply/Demand Balance by Country/Range
- Average Productivity by Country/Port Range

**OCEAN
SHIPPING
CONSULTANTS**