Port Trade Performance
CY2022 versus CY2023

01.03.2024

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Port Trade Performance CY2023

1. KEY FIGURES AT A GLANCE

Total Trade Volume	**8.0**	**Million tonnes**	**(+4.6%)**
• Containerised Cargo	4.0	Million tonnes	(12.3%)
• Dry Bulk Cargo	1.8	Million tonnes	(-1.04 %)
• Liquid Bulk Cargo	2.1	Million tonnes	(-2.3%)
• Fish Traffic	116,151	tonnes	(-5.8%)
Total Container Traffic	**448,526**	**TEUs**	**(+10 %)**
• Captive Container	242,701	TEUs	(-2.0%)
• Transhipment Container Inwards	205,825	TEUs	(+28.6%)
• Transhipment Container Outwards	200,410	TEUs	(+23.6%)
Total Container Throughput (incl. Restows)	**660,161**	**TEUs**	**(+13.2%)**
Total Vessel Traffic	2961	calls	(+11.4%)
• Containerised Vessels	522	calls	(+17.0%)
• Fishing Vessels	757	calls	(-7%)
Cruise Traffic			
• Cruise Vessel	27	calls	(+237.5%)
• Passengers on Arrival	25,388	passengers	(+325.8%)
• Passengers on Departure	25,432	passengers	(+312.7%)
Total Bunker Traffic	**509,837**	**tonnes**	**(+3.5%)**
• Pipeline	53,850	tonnes	(-33.6%)
• Barges	455,987	tonnes	(+10.8%)

2. INTRODUCTION

The Global economy remains resilient and continues to recover despite divergences noted across regions. According to World Economic Outlook Update Jan 2023, global growth is estimated to slow from 3.5% in CY2022 to 3.1% in CY2023. For advanced economies, the expected slowdown is from 2.6% in CY2022 to 1.6% in CY2023 amid stronger than expected US momentum but weaker than expected growth in the Euro area.

Despite shipping continues to navigate Covid-19 post pandemic trends, the legacies of the 2021-2022 crunch in global supply chains, a softening in the container shipping market and shifts in shipping patterns arising from the war in Ukraine, Maritime trade volume was estimated to grow by 2.4% in CY2023 after a contraction of 0.4% in CY2022, according to UNCTAD. In the same vein, it projects that containerised trade, which declined by 3.7% in CY2022, is estimated to increase by 1.2% in CY2023.

At national level, GDP at market prices in CY2023 is estimated to grow by 7.1%, lower than the 8.9% in CY2022. It is to be noted that the household consumption was impacted by the high inflation rate (7.0% in CY2023 compared to 10.8% in CY2022). From sectoral perspective, the tourism sector continues to recover as the tourist arrivals is estimated to be slightly higher than 1,300,000 in CY2023 compared to 997,290 in CY2022 whilst the textile manufacturing estimated to decline by 10.5% in CY2023 after a growth of 6.7% in 2022 in view of challenging economic environment in our main markets, according to Statistics Mauritius.

From the port side, the total cargo traffic reached 7,993,031 tonnes in CY2023 as compared to 7,640,827 tonnes registered in CY2022, representing an increase of 4.6%.

Concomitantly, total container traffic registered a double-digit growth of 10.0% with 448,563 TEUs in CY2023 as compared to 407,825 TEUs in CY2022, driven by transhipment activities which witnessed a major boost in 2023 by registering a growth of 28.6%.

In CY2023, the port witnessed a growth of 11.4% in the total vessels calls and stood with 2,961 calls.

3. TOTAL CARGO TRAFFIC

Total Cargo tonnage handled in the port stood 7,983,513 tonnes in CY2023 as compared to 7,640,827 tonnes in CY2022, an increase of 4.5%, equivalent to 342,686 tonnes, as summarised in Table 1.

Table 1: Total Cargo Traffic – CY2022 v/s CY2023 (tonnes)

	CY2022	CY2023	Difference	% Change
Total Imports	4,998,774	4,937,919	-60,855	-1.2
Total Exports	1,175,501	1,149,029	-26,472	-2.2
Total Containerised Transhipment Inwards	1,466,552	1,896,565	430,013	29.3
Total	**7,640,827**	**7,983,513**	**342,686**	**4.5**

Total Imports

Total Imports Traffic declined from 4,998,774 tonnes in CY2022 to tonnes 4,937,919 in CY2023, representing a contraction of 1.2%. With the exception of containerised cargo (+3.0 %), all segments noted contractions, namely dry bulk (-1.0%), liquid bulk (-4.17%), fish (-3.2%) and general cargo (-25.0%).

Total Exports

Total exports have declined from 1,175,501 tonnes in CY2022 to 1,149,029 tonnes in CY2023, a decrease of 2.2%, equivalent to 26,472 tonnes.

It should be noted that declines recorded in containerised cargo (-6.6%), fish (-60.1%) more than offset the expansions noted in Liquid bulk (4.10%) and General cargo (25.0%)

Total Containerised Transhipment Inwards

Total Containerised Transhipment Inwards traffic stood at 1,896,565 tonnes in CY2023 as compared to 1,466,552 tonnes in CY2022, an increase of 29.3%, equivalent to 430,013 tonnes.

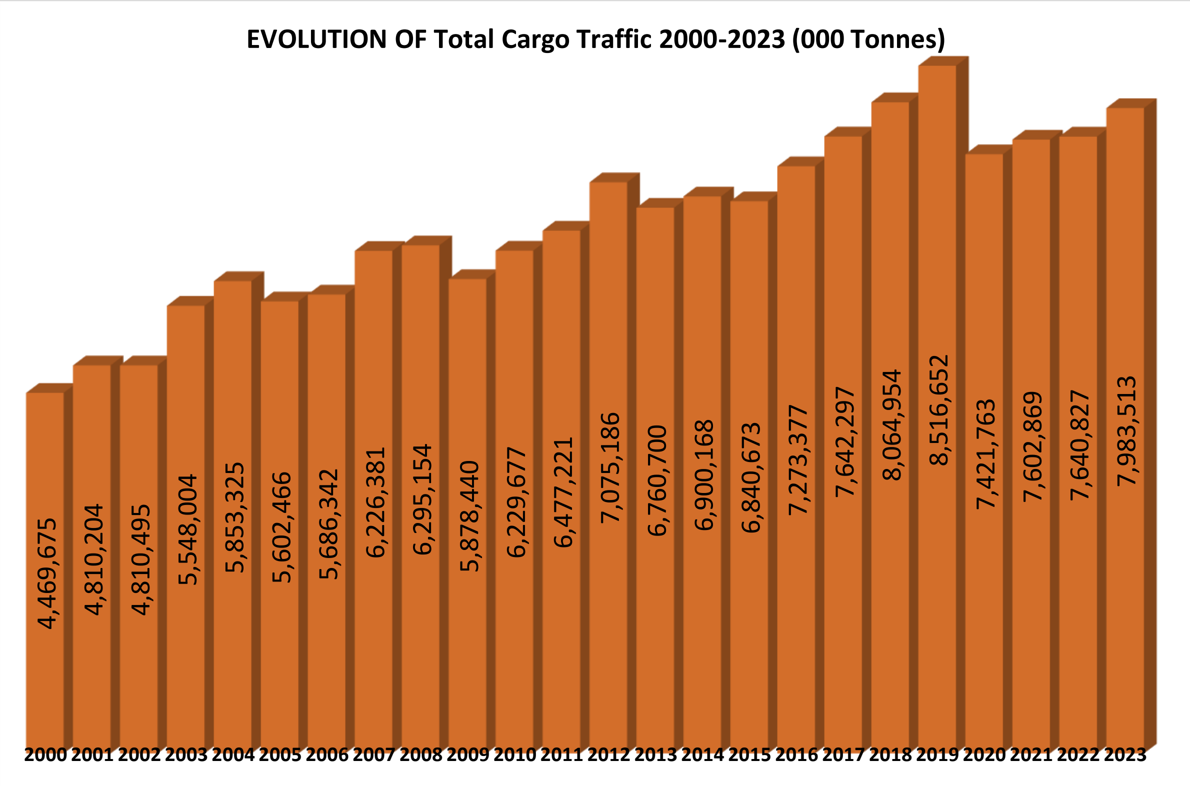


Figure 1: Evolution of Total Cargo Traffic (tonnes)

4. TOTAL IMPORTS

Total Imports decreased by 1.2%, with tonnes 4,937,919 in CY2023 as compared to 4,998,774 tonnes in CY2022. Table 2 illustrates the breakdown of Total Imports CY2022 vs CY2023.

Table 2: Breakdown of Total Imports CY2023 v/s CY2023 (tonnes)

Imports	CY2022	CY2023	Difference	% Change
Dry Bulk	1,792,337	1,773,745	-18,592	-1.0
Liquid Bulk	1,636,637	1,568,336	-68,301	-4.2
Containerised	1,404,585	1,446,253	41,668	3.0
Fish	117,695	113,941	-3,754	-3.2
General cargo	47,520	35,644	-11,876	-25.0
Total	**4,998,774**	**4,937,919**	**-60,855**	**-1.2**

4.1. Dry (Solid) Bulk Imports

Dry (Solid) bulk imports have witnessed a contraction from 1,792,337 tonnes in CY2022 to 1,773,745 tonnes in CY2023, representing a decrease of -1.0% equivalent to 18,592 tonnes, as detailed in Table 3.

Table 3: Solid Bulk Imports – CY2022 v/s CY2023 (tonnes)

	CY2022	CY2023	Difference	% Change
Coal	580,103	655,785	75,682	13.0
Cement	760,869	707,478	-53,391	-7.0
Wheat	137,756	118,490	-19,266	-14.0
Sugar	126,000	84,000	-42,000	-33.3
Maize	118,692	144,600	25,908	21.8
Soya Bean Meal	68,917	63,392	-5,525	-8.0
Total	**1,792,337**	**1,773,745**	**-18,592**	**-1.0**

- Coal imports registered an expansion of 13.0%, with 655,785 tonnes in CY2023 as compared to 580,103 tonnes in CY2022, reflecting the resumption of power generation by Terragen Ltd since April 2023.

- Bulk Cement imports decreased by -7.0% with 707,478 tonnes in CY2023 as compared to 760,869 tonnes in year 2022. This decline is mainly attributed to delays in the construction works of metro projects and low-cost housing.

- For the year under review, imports of wheat decreased by 14.0% from 137,756 tonnes in CY2022 to 118,490 tonnes in CY2023. This traffic has been on the low side as LMLC was awarded partly the contract of supply of flour for the domestic market in CY2023.

- Bulk sugar import has reduced from 126,000 tonnes in CY2022 to 84,000 tonnes in CY2023 as the bulk carrier with a parcel load of 42,000 tonnes completed its unloading operations in CY2024.

- Maize and soya bean meal imports are mainly used in the production of animal feed. For the year under review, it is worth noting that Maize imports have registered a growth of 21.8% whilst imports of Soya bean meal have declined by -8.0%.

  The combined traffic has noted a growth of 16.7% for CY2023, reflecting the strong performance in the hospitality sector as tourist arrivals estimated to be slightly higher than 1,300,000 in 2023 compared to 997,290 in 2022, according to National Accounts Estimates December 2023.

4.2. Liquid Bulk Imports

Total imports of liquid bulk decreased by -4.2%, representing 68,301 tonnes, from 1,636,637 tonnes in CY2022 to tonnes 1,568,336 in CY2023 as summarised in table 4.

Table 4: Liquid Bulk Imports - CY2022 v/s CY2023 (tonnes)

	CY2022	CY2023	Difference	% Change
White oil	734,506	787,038	52,532	7.1
Black oil	784,595	662,444	-122,151	-15.6
LPG	91,856	92,776	920	1.0
Edible oil	16,626	21,004	4,378	26.3
Bitumen	9,054	5,074	-3,980	-44.0
Total	**1,636,637**	**1,568,336**	**68,301**	**-4.2**

- Imports of White oil grew from 734,506 tonnes in CY2022 to 787,038 tonnes in CY2023, reflecting mainly the increase in the importation of JET A1 owing to rapid recovery in tourists' arrival for the period under review.

- Imports of Black oil contracted significantly from 784,595 tonnes in CY2022 to 662,444 tonnes in CY2023, representing a contraction of 15.6%. This decline was mainly attributed to the reduction in the importation of heavy fuel oil for power generation by CEB following the resumption of power generation by Terragen Ltd since April 2023.

- Imports of LPG increased by 1.0% from 91,856 tonnes in CY2022 to 92,776 tonnes in CY2023.

- For the year under review, imports of Edible Oil noted an increase of 26.3% from 16,626 tonnes in 2022 to 21,004 tonnes in 2023, equivalent to 4,378 tonnes.

- Bitumen imports has noted a decrease of -44.0 % from 9,054 tonnes in 2022 to 5,074 tonnes in 2023.

4.3. Containerised Cargo Imports

Total containerised imports increased by 3.0%. The breakdown of this traffic in Table 5 reveals that containerised imports expanded by 3.2% whereas inter-Island imports declined by -16.6%.

Table 5: Containerised Cargo Imports – CY2022 v/s CY2023 (tonnes)

	CY2022	CY2023	Difference	% Change
Captive	1,385,923	1,430,682	44,759	3.2
Inter-Island	18,662	15,571	-3,091	-16.6
Total	**1,404,585**	**1,446,253**	**41,668**	**3.0**

4.4. General Cargo Imports

Total General Cargo Imports witnessed a contraction of 25.0% in CY2023. The breakdown of this traffic in Table 6 shows that both unitized break bulk and inter island general cargo imports witnessed reductions of 23.7% and 63.1%, respectively.

Table 6: General Cargo Imports – CY2022 v/s CY2023 (tonnes)

	CY2022	CY2023	Difference	% Change
Unitized Break Bulk	45,920	35,053	-10,867	-23.7
Inter-Island	1,600	591	-1,009	-63.1
Total	**47,520**	**35,644**	**-11,876**	**-25.0**

4.5. Fish Traffic Imports

Total fish import, which is still below the pre-pandemic level of CY2019 (155,321 tonnes) posted a contraction of 31.9%, with tonnes 113,942 in CY2023 as compared to 117,695 tonnes in CY2022.

At the same time, it is worth noting that the total number of fishing vessels calling at Port Louis have increased from 737 calls in CY2022 to 741 calls recorded in CY2023, representing a growth 0.5%.

Table 7: Fish Traffic Imports - CY2022 v/s CY2023 (tonnes)

	Volume (tonnes)				No. of Fishing Vessel Calls			
	CY2022	CY2023	Difference	% Change	CY2023	CY2023	Difference	% Change
Tuna/ Loin Processing	71,596	69,044	-2,552	-3.6	28	23	-5	-17.9
Local Market	2,402	3,038	636	26.5	246	312	66	26.8
Transhipment In	38,154	39,650	1,496	3.9	332	334	2	0.6
Direct Transhipment In	5,543	2,210	-3,333	-60.1	131	72	-59	-45.0
Total	**117,695**	**113,942**	**3,753**	**-31.9**	**737**	**741**	**4**	**0.5**

- Imports of Tuna as raw materials by Princes Tuna and Thon des Mascareignes, posted a reduction of 3.6% and contracted from 71,596 tonnes in CY2022 to 69,044 tonnes in CY2023 as raw materials are also being imported in reefer containers.

- On the other hand, it is worth noting, fish catch in our oceanic banks, mainly meant for the local market, has gone up by 26.5% from 2,402 tonnes in CY2022 to 3,038 tonnes in CY2023, reflecting higher demand for fish with the rapid recovery of the hospitality sector.

- Fish transhipment activity has increased by 3.9%, with 39,650 tonnes in CY2023 against 38,154 tonnes recorded in CY2022. This traffic is still below the pre-pandemic level, weighed down by the following factors, namely:
    i. ban on the use of fish holds to carry bunker
    ii. policy decision for non-issuance of licence to Taiwanese vessels since 2022
    iii. IOTC's regulations, which allow long liners to undertake transhipment activities on high seas.

- On the contrary, direct ship to ship transhipment has gone down from 5,543 tonnes in CY2022 to 2,210 tonnes recorded during the current calendar year, representing a decrease of 60.1% as most of the transhipped fish are being exported in reefer containers following the stabilisation of freight rates.

5. TOTAL EXPORTS

Total exports decreased by 2.2% and stood at 1,149,029 tonnes in CY2023 as compared to 1,175,501 tonnes in CY2022. It is to be noted that no export of dry bulk cargo was effected during the period under review.

Table 8: Breakdown of Total Bulk Exports - CY2022 v/s CY2023 (tonnes)

Exports	CY2022	CY2023	Difference	% Change
Liquid Bulk	492,492	512,704	20,212	4.1
Containerised	673,237	628,828	-44,409	-6.6
General cargo	4,229	5,287	1,058	25.0
Fish	5,543	2,210	-3,333	-60.1
Total	**1,175,501**	**1,149,029**	**-26,472**	**-2.2**

5.1 Liquid Bulk Exports

Exports of Liquid Bulk cargo registered a growth of 4.1% from 492,492 tonnes in CY2022 to 512,704 tonnes in CY2023, equivalent to 20,212 tonnes as detailed in Table 9.

Table 9: Breakdown of Liquid Bulk Exports - CY2022 v/s CY2023 (tonnes)

	CY2022	CY2023	Difference	% Change
Total Bunker	492,492	509,837	17,345	3.5
White Oil*	0	2,867	2,867	0
Grand Total	**492,492**	**512,704**	**20,212**	**4.1**

** export of contaminated white oil ex-UOG Sparta in April 2023*

5.1.1 Bunkering Activities

Total volume of bunker increased by 3.5% from 492,492 tonnes in CY2022 to reach 509,837 tonnes in CY2023 as outlined in Table 10.

Table 10: Total Bunker Exports – CY2022 v/s CY2023

	Volume in Tonnes				Vessel Calls			
	CY2022	CY2023	Difference	% Change	CY2022	CY2023	Difference	% Change
Bunker by pipeline	81,057	53,850	-27,207	-33.6	947	895	-52	-5.5
Bunker by barge	411,435	455,987	44,553	10.8	902	1050	148	16.4
Total	**492,492**	**509,837**	**17,345**	**3.5**	**1,849**	**1,945**	**96**	**5.2**

Bunker Volume

- Volume of bunker by pipeline, noted a contraction of -33.6% and stood at 53,850 tonnes in CY2023 against 81,057 tonnes in CY2022. This was mainly attributed to restriction to carry bunkers in fish holds.
  However, it is to be noted that this traffic has showed signs of recovery during the last two months of 2023, driven by higher demand of bunkers by fishing vessels operating in oceanic banks.

- On the other hand, bunker by barge note a significant growth of 10.8% from 411,435 tonnes in CY2022 to 455,987 tonnes in CY2023, equivalent to 44,553 tonnes.

  The barge segment has noted rapid recovery since July 2023, largely driven by the recovery of maritime trade volume (by 2.4% in 2023 vs -0.4% in 2022) according to Review of Maritime Trade 2023 as well as the red sea attacks since November 2023 with ships avoiding Suez Canal and sailing an extra 4,000 miles around Africa.

Bunker calls

- The total number of vessels refuelling at Port Louis has increased from 1,849 calls in CY2022 to 1,945 calls in CY2023, representing a growth of 5.2%

- It is worth noting that number of vessels calling at Port Louis for bunker through Barge augmented by 16.4% whereas bunker by pipeline witnessed a reduction of 5.2%, respectively for the year under review.

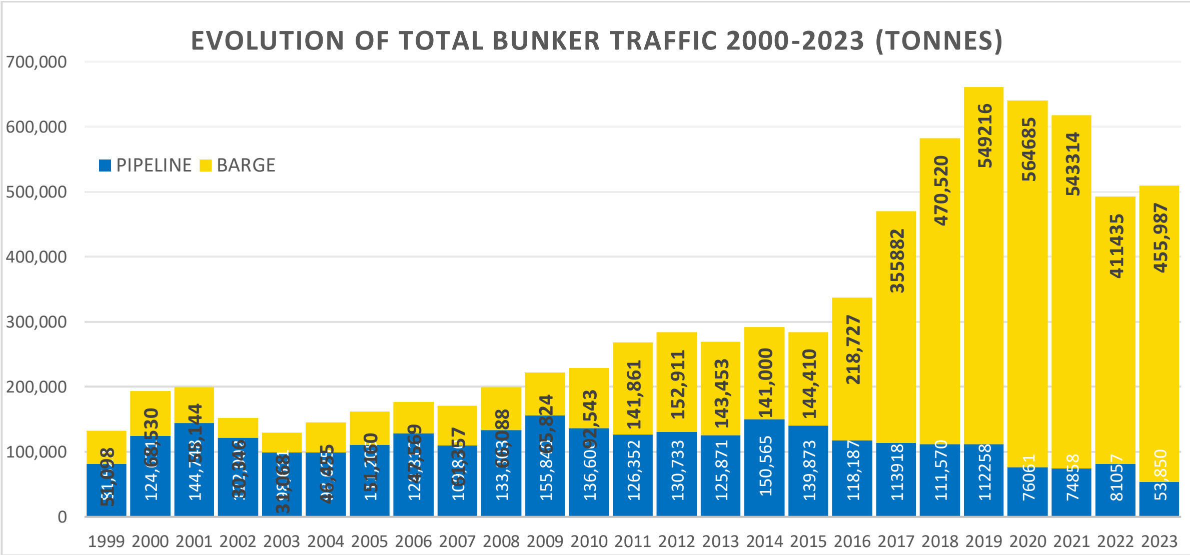


Figure 2: Evolution of total bunker traffic from 2000 to 2023.

5.2 Containerised Cargo Exports

Total containerised cargo exports registered a drop 7.0% from 673,237 tonnes in CY2022 to 628,828 tonnes in CY2023. The breakdown of this traffic reveals that inter-island expanded by 0.4 % whilst captive containerised exports noted a contraction of 7.6%.

Table 11: Containerised Exports – CY2022 v/s CY2023 (tonnes)

	CY2022	CY2023	Difference	% Change
Captive	585,605	540,834	-44,771	-7.6
Inter-Island	87,632	87,994	362	0.4
Total	**673,237**	**628,828**	**-44,409**	**-7.0**

5.3 General Cargo Exports

Total General Cargo Exports witnessed a significant expansion of 25.0%. The breakdown of this traffic shows that Unitized Break Bulk had a growth of 289.7 % whereas inter-island trade noted a contraction to the tune of 4.8%.

Table 12: General Cargo Exports – CY2022 v/s CY2023 (tonnes)

	CY2022	CY2023	Difference	% Change
Unitized Break Bulk	428	1,668	1,240	289.7
Inter-Island	3,801	3,619	-182	-4.8
Total	**4,229**	**5,287**	**1,058**	**25.0**

5.4 Fish Traffic Exports

For the CY2023, direct transhipment outwards of fish stood at 2,210 tonnes as opposed to 5,543 tonnes in CY2022, representing a decrease of -60.1% due to stabilisation of freight rates as transhipped fish are mostly exported in containers for the calendar year under review.

Table 13: Fish Exports – CY2022 v/s CY2023 (tonnes)

	Volume in Tonnes				No of vessel Calls			
	CY2022	CY2023	Difference	% Change	CY2022	CY2023	Difference	% Change
Direct Transhipment outwards (ship to ship)	5,543	2,210	-3,333	-60.1	27	16	-11	-40.7

6. TOTAL CONTAINER TRAFFIC

Total Container Traffic (excluding paid restows) witnessed a growth of 10.0%, equivalent to 40,701 TEUs from 407,825 TEUs in CY2022 to 448,526 TEUs in CY2023.

It is worth noting that captive container traffic contracted by 2.1% whilst transhipment container traffic expanded by 28.6. Details are summarised in Table 14.

Table 14: Total Container Traffic – CY2022 v/s CY2023 (TEUs)

	CY2022	CY2023	Difference	% Change
Captive	247,816	242,701	-5,115	-2.1
Transhipment	160,009	205,825	45,816	28.6
Total	**407,825**	**448,526**	**40,701**	**10.0**

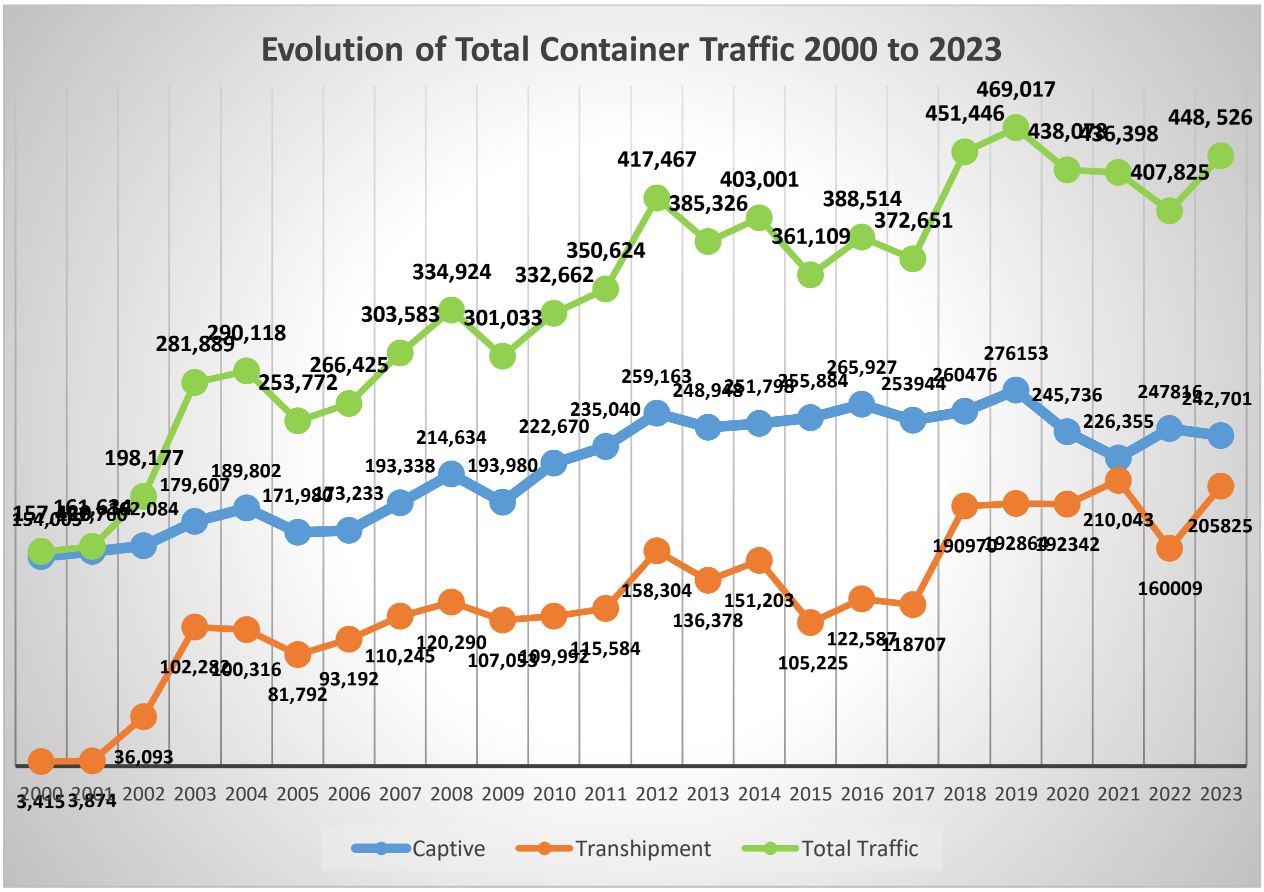


Figure 3: Evolution of total container traffic from 2000 to 2023.

6.1 Total Captive Container Traffic

Total Captive Container Traffic has gone down from 247,816 TEUs to 242,701 TEUs, representing a contraction to the tune of 2.1%. Table 15 shows the comparative monthly captive container traffic for the calendar year under review.

Table 15: Total Captive Container Traffic - CY2022 v/s CY2023 (TEUs)

	CY2022	CY2023	Difference	% Change
Jan	21,937	15,317	-6,620	2
Feb	11,277	17,401	6,124	54.3
Mar	20,594	19,648	-946	-4.6
Apr	18,994	19,891	897	4.7
May	20,571	23,072	2,501	12.2
Jun	20,889	18,717	-2,172	-10.4
Jul	20,630	21,431	801	3.9
Aug	21,545	21,180	-365	-1.7
Sep	22,617	18,851	-3,766	-16.6
Oct	23,364	22,875	-489	-2.1
Nov	20,060	20,316	256	1.3
Dec	25,338	24,002	-1,336	-5.3
Total	**247,816**	**242,701**	**-5,115**	**-2.1**

6.1.1 Captive Laden Import Container Traffic

Laden import container traffic witnessed a growth of 3.0% equivalent to 3,326 TEUs with a total of 115,700 TEUs in CY2023 as compared to 112,374 TEUs in CY2022 as shown in Table 16.

Table 16: Captive Laden Import Container Traffic - CY202 v/s CY2023 (TEUs)

	CY2022	CY2023	Difference	% Change
Jan	8,851	7,443	-1408	-15.9
Feb	5,546	8,149	2603	46.9
Mar	9,440	9,271	-169	-1.8
Apr	8,288	8,623	335	4.0
May	9,265	9,815	550	5.9
Jun	9,293	8,308	-985	-10.6
Jul	9,121	10,295	1174	12.9
Aug	10,963	10,238	-725	-6.6
Sep	9,619	10,128	509	5.3
Oct	11,156	10,314	-842	-7.6
Nov	10,106	10,341	235	2.3
Dec	10,726	12,775	2,049	19.10
Total	**112,374**	**115,700**	**3,326**	**3.0**

Although this traffic recorded a growth of 3.0% in 2023, it is still below the pre-pandemic level. The slow recovery was mainly attributed to elevated prices of imported products as well as lower imports of textile and construction materials in 2023, according to Statistics Mauritius.

6.1.2 Captive Laden Export Container Traffic

Captive laden export container traffic witnessed a decline of 6.6 %, equivalent to 3,553 TEUs, with a total of 50,306 TEUs in CY2023 as compared to 53,859 TEUs in CY2022, reflecting mainly the decline in exports of textile products due to recession in our main markets.

Table 17: Captive Laden Export Container Traffic - CY2022 v/s CY20223 (TEUs)

	CY2022	CY2023	Difference	% Change
Jan	3,993	3,843	-150	-3.8
Feb	2,638	3,789	1151	43.6
Mar	5,338	4,461	-877	-16.4
Apr	4,786	3,568	-1218	-25.4
May	4,304	4,371	67	1.6
Jun	4,288	3,344	-944	-22.0
Jul	4,284	4,303	19	0.4
Aug	4,286	5,427	1141	26.6
Sep	5,295	4,008	-1287	-24.3
Oct	5,442	4,934	-508	-9.3
Nov	4,305	3,582	-723	-16.8
Dec	4,900	4,676	-266	-5.4
Total	**53,859**	**50,306**	**-3553**	**-6.6**

6.1.3 Captive Empty Import Container Traffic

Captive empty import container traffic expanded by 399 TEUs from 10,107 TEUs in CY2022 to 10,506 TEUs in CY2023, representing a growth of 3.9% for the calendar year under review. Details are outlined in Table 18.

Table 18: Captive Empty Import Container Traffic CY2022 v/s CY20223 (TEUs)

	CY2022	CY2023	Difference	% Change
Jan	563	848	285	50.6
Feb	300	539	239	79.7
Mar	801	1,069	268	33.5
Apr	666	759	93	14
May	834	527	-307	-36.8
Jun	840	639	-201	-23.9
Jul	906	816	-90	-9.9
Aug	815	964	149	18.3
Sep	736	1,119	383	52.0
Oct	895	894	-1	-0.1
Nov	1,843	983	-860	-46.7
Dec	908	1,349	441	48.6
Total	**10,107**	**10,506**	**399**	**3.9**

6.1.4 Captive Empty Export Container Traffic

Table 19 provides a comparative monthly summary of the captive empty export container traffic for the year CY2022 vs CY2023.

Table 19: Captive Empty Export Container Traffic - CY2022 v/s CY2023 (TEUs)

	CY2022	CY2023	Difference	% Change
Jan	8,530	3,183	-5,347	-62.7
Feb	2,793	4,924	2,131	76.3
Mar	5,015	4,847	-168	-3.4
Apr	5,254	6,941	1,687	32.1
May	6,168	8,359	2,191	35.5
Jun	6,468	6,426	-42	-0.7
Jul	6,319	6,017	-302	-4.8
Aug	5,481	4,551	-930	-17.0
Sep	6,967	3,596	-3,371	-48.2
Oct	5,871	6,733	862	14.7
Nov	3,806	5,410	1,604	42.1
Dec	8,804	5,202	-3,602	-40.9
Total	**71,476**	**66,189**	**-5287**	**-7.4**

Captive empty export container traffic contacted by 7.4% with 66,189 TEUs in CY2023 as compared to 71,476 TEUs in CY2022.

6.2 Total Transhipment Inwards Container Traffic

Table 20: Total Transhipment Inwards Container Traffic - CY2022 v/s CY2023(TEUs)

	CY2022	CY2023	Difference	% Change
Jan	21,127	13,291	-7,836	-37.1
Feb	(2 cyclones) 6,207	14,834	8,627	139.0
Mar	14,391	18,086	3,695	25.7
Apr	11,886	12,435	549	4.6
May	14,263	15,698	1,435	10.1
Jun	10,578	16,856	6,278	59.3
Jul	(Go slow) 9,346	17,524	8,178	87.50
Aug	12,225	21,897	9,672	79.12
Sep	14,176	19,871	5,695	40.2
Oct	13,930	19,996	6,066	43.5
Nov	15,886	16,996	1,110	7.0
Dec	15,994	18,341	2,347	14.7
Total	**160,009**	**205,825**	**45,816**	**28.6**

This traffic witnessed a major boost in 2023 due to ships, which were initially deployed to more lucrative and North American markets in 2022, were repositioned again to service our region as well as the ongoing congestion crisis at Durban Port.

6.2.1 Transhipment Inwards Laden Container Traffic (TEUs)

Table 21 shows the details of the comparative monthly laden containers transhipped at Port Louis. This traffic registered a growth of 29.3% during the calendar year under review, equivalent to 34,932 TEUs.

Table 21: Transhipment Inwards Laden Container Traffic - CY2022 v/s CY2023 (TEUs)

	CY2022	CY2023	Difference	% Change
Jan	14,118	9,889	-4,229	-29.9
Feb	4,444	10,687	6,243	140.5
Mar	10,916	12,772	1,856	17.0
Apr	9,772	8,162	-1,610	-16.5
May	12,045	12,430	385	3.2
Jun	7,976	11,563	3,587	45.0
Jul	7,900	14,157	6,257	79.2
Aug	8,968	15,105	6,137	68.4
Sep	10,110	15,528	5,418	53.6
Oct	10,688	16,366	5,678	53.1
Nov	10,827	13,101	2,274	21.0
Dec	11,371	14,307	2,936	25.8
Total	**119,135**	**154,067**	**34,932**	**29.3**

6.2.2 Transhipment Inwards Empty Container Traffic (TEUs)

For the calendar year under review, empty transhipment container volume jumped from 40,874 TEUs in CY2022 to 51,758 TEUs in CY2023 as detailed in Table 22.

Table 22: Transhipment Inwards Empty Container Traffic - CY2022 v/s CY2023(TEUs)

	CY2022	CY2023	Difference	% Change
Jan	7,009	3,402	-3,607	-51.5
Feb	1,763	4,147	2,384	135.2
Mar	3,475	5,314	1,839	52.9
Apr	2,114	4,273	2,159	102.1
May	2,218	3,268	1,050	47.3
Jun	2,602	5,293	2,691	103.4
Jul	1,446	3,367	1,921	132.8
Aug	3,257	6,792	3,535	108.5
Sep	4,066	4,343	277	6.8
Oct	3,242	3,630	388	12.0
Nov	5,059	3,895	-1,164	-23.0
Dec	4,623	4,034	-589	-12.7
Total	**40,874**	**51,758**	**10,884**	**26.6**

6.3 Total Container Throughput

Total Container Throughout, comprising Total Container Traffic + Total Transhipment Container Outwards+ paid restows for the period CY2023 stood at **660,161** TEUs versus 582,604 TEUs in CY2022, representing an increase of 13.3%, equivalent to **77,557** TEUS as shown in Table 23.

Table 23: Total Container Throughput – CY2022 v/s CY2023 (TEUs)

	CY2022	CY2023	Difference	% Change
Captive	247,816	242,701	-5,078	-2.1
Transhipment Inwards	160,009	205,825	45,816	28.6
Transhipment outwards	162,114	200,410	38,296	23.6
Paid restows	12,665	11,225	-1,440	-11.4
Total	**582,604**	**660,161**	**77,557**	**13.3**

7. PERFORMANCE INDICATORS AT MCT

7.1 Container Vessel Operated at MCT

Total container vessel calls at Port Louis in CY2023 were 522. Out of which, some 521 container vessels were operated at MCT for the CY2023 as compared to 440 in CY2022.

An increase of 81 vessels has been noted at MCT for the year under review. The breakdown of 521 vessels serviced at MCT in CY2023 by category as depicted in Table 24.

Table 24: Vessels serviced at MCT – CY2022 v/s CY2023

	CY2022	CY2023	Difference	% Change
Jan	39	35	-4	10.3
Feb	23	40	17	73.9
Mar	39	48	9	23.1
Apr	36	43	7	19.4
May	40	49	9	22.5
Jun	32	45	13	40.6
Jul	32	49	17	53.1
Aug	42	51	9	21.4
Sep	32	41	9	28.1
Oct	39	44	5	12.8
Nov	37	37	0	0
Dec	49	39	-10	-20.4
Total	**440**	**521**	**81**	**18.4**

Vessel Category	CY2022	CY2023	Difference	% Change
Ultra large container 14,501 & higher	3	2	-1	-33.3
New Panamax 10,001 to 14,500 TEUs	5	13	8	1.6
Post Panamax 5,101 to 10,000 TEUs	130	180	50	38.5
Panamax 3,001 to 5,001 TEUs	77	82	5	6.5
Feedermax 2,001 to 3,000 TEUs	75	105	30	40
Feeder 1,001 to 2,000 TEUs	81	65	-16	19.7
Small Feeder up to 1,000 TEUs	69	74	5	7.2
Total	**440**	**521**	**81**	**18.4**

In CY2022, we witnessed a significant increase in the number of calls effected by Post Panamax Container ships of capacity 5,101 to 10,000 TEUs.

7.2 Container Throughput at MCT

The number of containers handled was 455,086 units in CY2023 compared to 391,576 units in CY2022, representing to a growth of 16.2%, equivalent to an increase of 63,510 units as depicted below in Table 25.

Similarly, container Throughput in terms of number of TEUs has risen from 566,911 TEUS in CY2022 to 646,156 TEUS in CY2023, representing a growth of 14.0% for the calendar year under review.

Likewise, the number of moves including all restows, hatch covers, gear boxes recorded in CY2023 was 469,275 compared to 404,872 in CY2022, representing an expansion of 15.9%, equivalent to 64,403 moves. Table 25 provides the MCT operational indicators in terms of no. of containers/ TEUs/ Moves.

Table 25: No of Containers/TEUs/Moves - CY2022 v/s CY2023

Month	Containers			TEUs			Moves		
	CY2022	**CY2023**	**Difference**	**CY2022**	**CY2023**	**Difference**	**CY2022**	**CY2023**	**Difference**
Jan	42,380	28,531	-13,849	62,074	40,892	-21,182	43,686	29,627	-14,059
Feb	18,902	32,666	13,764	27,218	46,933	19,715	19,548	33,786	14,238
Mar	34,302	40,407	6,105	49,653	56,224	6,571	35,404	41,839	6,435
Apr	28,039	36,297	8,258	40,628	49,113	8,485	28,905	35,787	6,882
May	35,150	34,181	-969	51,303	49,923	-1,380	36,402	35,570	-832
Jun	30,976	36,279	5,303	45,460	53,162	7,702	32,030	37,595	5,565
Jul	26,627	38,357	11,730	38,466	56,411	17,945	27,621	39,723	12,102
Aug	28,805	43,509	14,704	41,172	63,533	22,361	29,809	45,017	15,208
Sep	34,765	41,866	7,101	50,316	58,429	8,113	36,011	43,184	7,173
Oct	37,642	45,815	8,173	54,315	63,117	8,802	38,882	47,299	8,417
Nov	35,252	34,821	-431	50,571	49,525	-1,046	36,442	36,025	-417
Dec	38,736	42,357	3,621	55,735	58,894	3,159	40,132	43,823	3,691
Total	**391,576**	**455,086**	**63,510**	**566,911**	**646,156**	**79,245**	**404,872**	**469,275**	**64,403**
% Change			**16.2**			**14.0**			**15.9**

7.3 Summary of the Key Performance Indicators @ MCT

Table 26 provides a summary of the various key performance indicators at the MCT.

Table 26: Key Performance Indicators at MCT – CY2022 v/s CY2023

	CY2022	CY2023
Average Moves Per Gross Crane Hour	21.1	22.4
Average Moves per Ship's Working Hour	36.2	38.9
Berth Occupancy (%)	67.1	77.8
Average moves per vessel	920.2	900.7
Average Vessel Time in Port as per CPPI	42.0	43.5
Average Vessel Time at Berth	*33.5*	*30.0*
Average Pre-berthing Delay (hrs)	*8.5*	*13.5*

- The average number of moves per gross crane hour has improved from 21.1 in CY2022 and 22.4 in CY2023.
- In the same vein, the average moves per ship's working hour also increased to 38.9 in CY2023 against 36.2 in CY2022.
- The berth occupancy went up from 67.1% in CY2022 to 77.8 in CY2023.
- The average moves per vessel went down from 920.2 moves in CY2022 to 900.7 moves in CY2023.
- Despite an improvement in crane & ship productivity and shorter vessel time at berth, average Total Time in port increased from 42.0 hrs in CY2022 to 43.5 Hrs in CY2023.
- The average pre-berthing delay per vessel stood at 13.5 hours in CY2023 as opposed to 8.5 hours posted in CY2022.

7.3.1 Crane Productivity

Table 27 provides the comparative crane productivity for the CY2022 versus CY2023.

Table 27: Average Moves per Gross Crane Hours - CY2022 v/s CY2023

	CY2022	CY2023
Jan	20.7	22.9
Feb	21.0	22.3
Mar	20.7	21.6
Apr	21.1	22.6
May	20.3	23.1
Jun	21.1	23.3
Jul	19.7 (Lowest – go slow)	23.4
Aug	22.4 (Highest)	22.3
Sep	21.5	23.5 (Highest)
Oct	21.1	21.9
Nov	22.3	22.2
Dec	21.5	21.0 (Lowest)
Average	**21.1**	**22.4**

Average Gross Crane Productivity is still below the target set in the new Addendum of the MCT Concession Contract 2019 of 25 Moves per Gross Crane Hour.

7.3.2 Ship Productivity

Comparative monthly ship productivity for the CY2023 versus CY2022 is detailed in Table 28.

Table 28: Average Moves per Ship's Working Hours - CY2022 v/s CY2023

	CY2022	**CY2023**
Jan	35.9	37.1
Feb	35.8	38.3
Mar	35.6	36.1
Apr	36.5	38.9
May	34.6	41.0
Jun	38.3	39.3
Jul	30.2 (lowest – go slow)	42.3 (highest)
Aug	37.4	38.7
Sep	36.4	41.8
Oct	38.1	38.4
Nov	44.4 (highest)	40.6
Dec	33.4	35.5 (lowest)
Average	**36.2**	**38.9**

The ship productivity stood at 38.9 moves per ship working hour in CY2023 against 36.2 moves recorded for the CY2022.

7.3.3 Berth Occupancy @ MCT

The berth occupancy for MCT is shown in Table 29 for the calendar year 2023 compared to CY2022.

Table 29: Berth Occupancy at MCT - CY2022 v/s CY2023 (%)

	CY2022	**CY2023**
Jan	81.3	67.4
Feb	42.5 (lowest)	68.9
Mar	67.3	86.5
Apr	53.7	74.5
May	74.7	75.7
Jun	58.7	60.5
Jul	68.9	57.1 (lowest)
Aug	55.9	88.3
Sep	84.7	87.8
Oct	63.3	89.0
Nov	64.2	84.0
Dec	86.2 (highest)	92.8 (highest)
Average	**67.1**	**77.7**

For the calendar year under review, the berth occupancy has increased from 67.1% in 2022 to 77.7% in 2023, reflecting mainly the increase in the number of vessels/containers handled at MCT since August 2023.

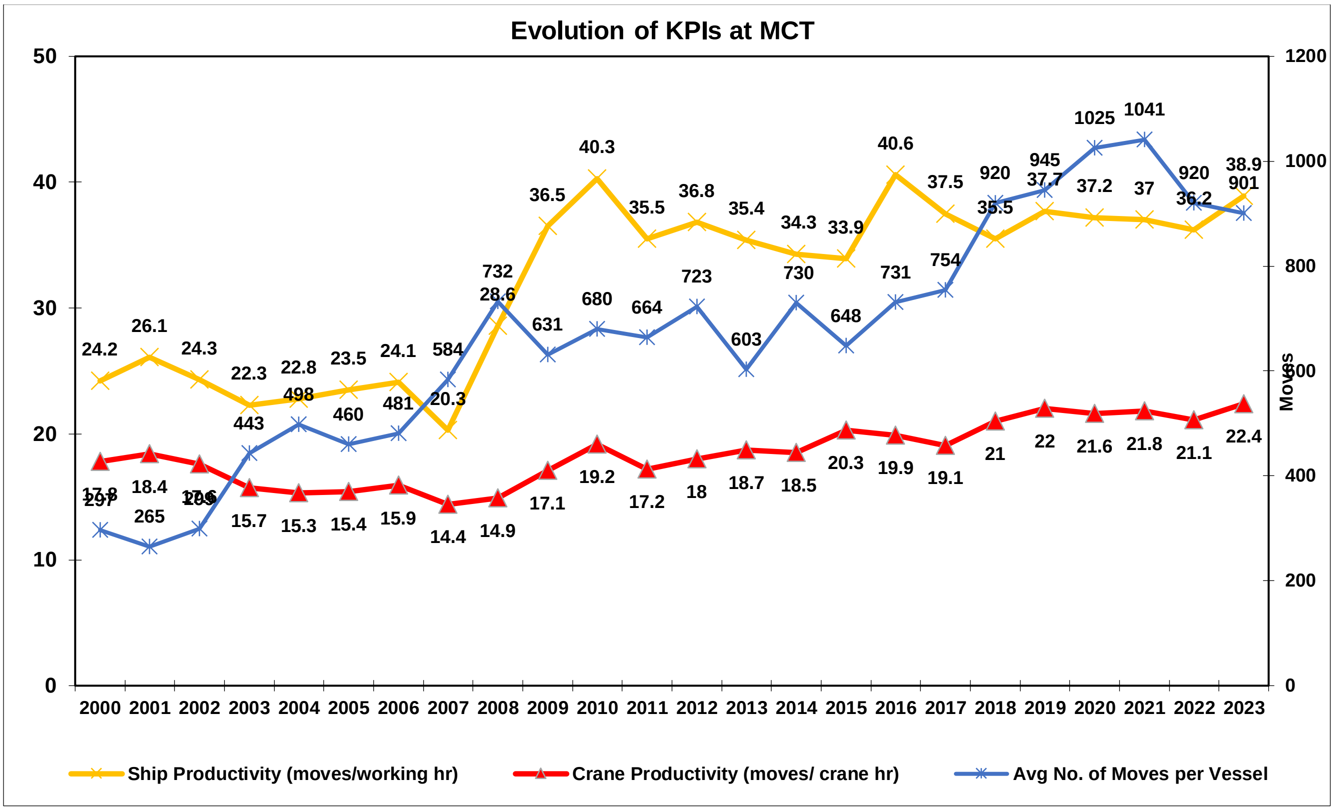


Figure 4: Evolution of KPIs at the Mauritius Container Terminal

7.3.4 Vessel Time in Port as per the Container Port Performance Index (CPPI)

The operational efficiency with which ports receive and turn around container ships is of critical importance to the carriers. In this context, the Container Port Performance Index (CPPI) has been developed based on total port time, which is defined as the total elapsed time between when the ship reaches a port (either port limits, pilot station, or anchorage zone) to when it departs from the berth after completing its cargo exchange.

> *The CPPI is based solely on the average port hours per port call, with port hours being the total time elapsed from when a ship first entered a port to when it departed from the berth.*

At Port Louis, the Average Total Time spent in port per vessel, as defined by CPPI includes the average pre-berthing delays and the time a vessel spends at berth, including time for container handling operations. Average Vessel Time in Port stood at 43.5 hrs in CY2023 compared to 42.0 hrs in CY2022, owing to the increase in pre-berthing delay as detailed below.

7.3.5 Average Time Spent at Berth

Whereas Average Time Spent at Berth by vessel for cargo handling operations was 30.0 hrs in comparison to 33.5 hrs in CY2022. The decline was mainly attributed in the decrease in average moves as shown in table 26 as well as improvement in productivity. In fact, the average gross crane productivity stood at 22.4 moves per gross crane hour in CY2023 compared to 21.1 moves recorded in the previous year.

It is noted that ships occasionally might not sail immediately upon completion of cargo operations because they are not operationally ready, have not been released by local authorities or remain alongside to carry out ancillary activities like repair works, loading spare parts, removal of garbage/ sludge and waiting for tug/ pilotage services.

7.3.6 Average Pre-berthing Delay

The pre-berthing delay is the interval between arrival and berthing of a vessel, i.e., waiting time in port begins when the ship enters the port waters (including pilotage inwards time) till berthing of the vessel at the designated quay.

MCT operates on a Fixed Berthing Window Scheme (FBWS) to enhance efficiency and optimize the utilization of port resources. FBWS refers to a scheduling system that allocates specific time windows for vessels to berth and unload/load cargo at the port. Under this scheme, each vessel is assigned a predetermined time slot during which it is expected to arrive and commence berthing operations, thus minimising waiting time and delays.

Port Louis, being a transhipment hub offering an umbrella of ancillary services in this region, waiting time is generally higher than other non-hub port since small feeders usually wait outside harbour to load the containers arriving on several big mother vessels from different destinations.

The MPA is promoting Port Louis for other port related services to boost the economic activities. These services also include ship repairs, change of crew, surveys, hull cleaning, etc. and are not available in all the regional ports.

In some instances, some container vessels arrive earlier than their fixed windows but wait for their export cargo to be ready or carry out some annex activities prior berthing.

Table 30: Average Pre-Berthing Delay - CY2022 v/s CY2023 (hrs)

	CY2022	**CY2023**
Jan	21.1 (heavy rain)	18.9 (heavy rain)
Feb	25.9 (2 cyclones)	15.9 (cyclone Freddy)
Mar	13.0 (post cyclones/ heavy rain)	15.1 (post cyclone)
Apr	6.9	6.3
May	1.9	7.1
Jun	11.1 (wind/ heavy rain)	5.0
Jul	3.9	4.7
Aug	8.7`	13.4 (heavy rain)
Sep	3.9	7.6
Oct	1.8	18.3 (peak season)
Nov	1.7	10.4 (wind/ heavy rain)
Dec	8.0	44.9 (swell/ heavy rain)
Average	**8.5**	**13.5**

Table 30 depicts the average pre-berthing delay at MCT, which has increased from 8.5 hrs in CY2022 to 13.5 hrs in CY2023, especially during and following the cyclone (Feb-Mar) and the peak season (Oct to Jan).

The average pre-berthing delay at MCT has increased from 8.5 hrs in CY2022 to 13.5 hrs in CY2023, especially during and following the cyclone (Feb-Mar) and the peak season (Oct to Jan)

It should be noted that in December 2023, handling operations got disrupted by swell conditions and heavy rain and same was further compounded by the end of year festive season with high absenteeism noted at CHCL's level and limited port operations on Christmas eve, Christmas and New Year eve. Both Average Gross Crane and Average Ship Productivity were at their lowest and Berth Occupancy was highest as it was also the peak period.

8. VESSEL CALLS

Some 2,961 vessel calls were registered during the year CY2023 as compared to 2,657 calls in CY2022, i.e. an excess of 304 calls. Table 31 provides a summary of Total Vessel Traffic for the calendar year under review.

Table 31: Vessel calls for the year - CY2022 v/s CY2023

Category	CY2022	CY2023	Difference	% Change
Containerized Vessels	446	522	76	17.0
Tankers	78	77	-1	-1.3
Dry Bulk carriers	52	52	Nil	Nil
General Cargo (incl. cattle carriers)	18	17	-1	-5.6
Fishing Vessels	764	757	-7	-0.9
Pure Car Carriers	36	40	4	11.1
Inter-Island	48	58	10	20.8
Cruise Vessels	8	27	19	237.5
Others	1207	1411	204	16.9
Total	**2,657**	**2,961**	**304**	**11.4**

- Containerised vessel calls registered a growth of 17.0%, with 522 calls in CY2023 as opposed to 446 calls in CY2022.
- No of calls by tankers was 77 in CY2023 as opposed to 78 recorded during the CY2022, registering a reduction of 1.3%.
- No. of calls made by Dry Bulk carriers stood at par for both CY2022 and CY2023, i.e. 52 vessels calls.
- Fishing vessel calls contracted by 0.9 % from 764 calls in CY2022 to 757 calls in CY2023.
- For the inter-island trade, total number of calls increased from 48 in CY2022 to 58 in CY2023.

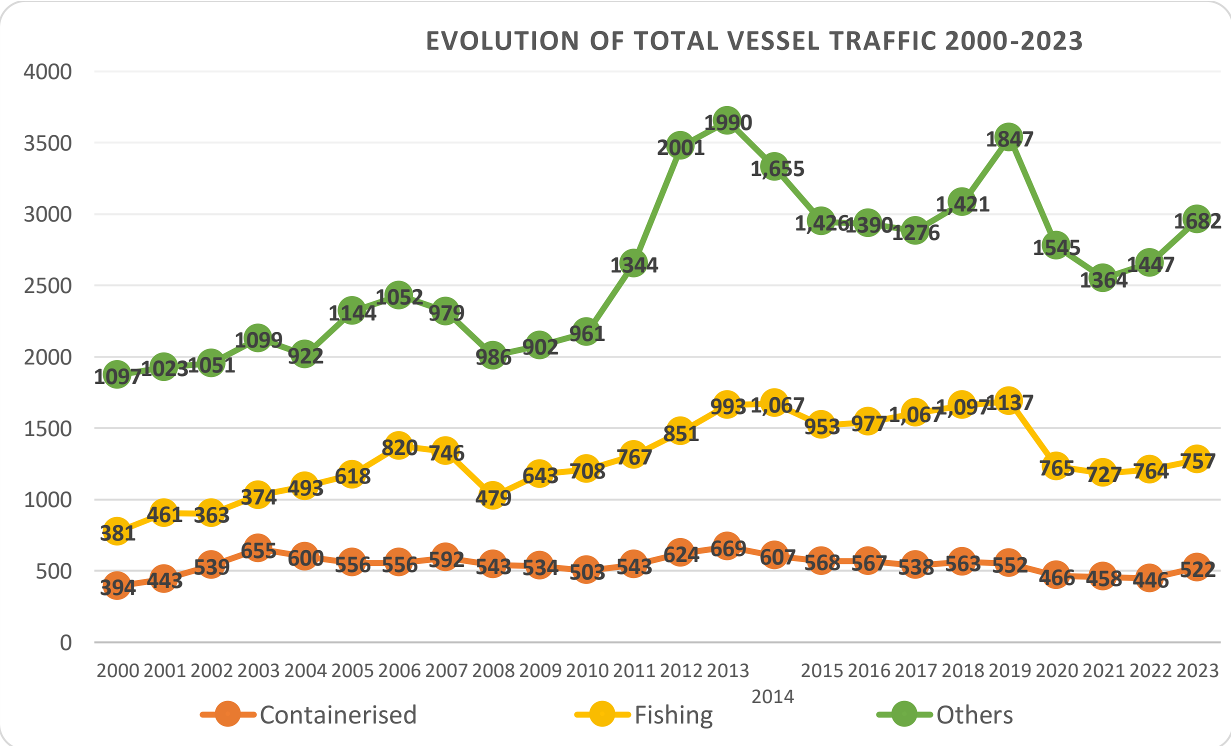


Figure 5: Evolution of total vessel traffic from 2000 to 2023

8.1 Cruise Tourism

According to the report titled 'State of the cruise industry September 2023', the cruise tourism continues to be one of the fastest growing sector of tourism and rebounded faster than international tourism arrivals.

Locally, the cruise segment has mirrored similar trend since Port Louis was established as a homeporting hub for the vanilla islands prior to the pandemic. Moreso, the inauguration of the modern cruise terminal on 11 December 2023 has further strengthened the position of Port Louis as the leading cruise hub in the Indian Ocea, % as detailed in Table 32.

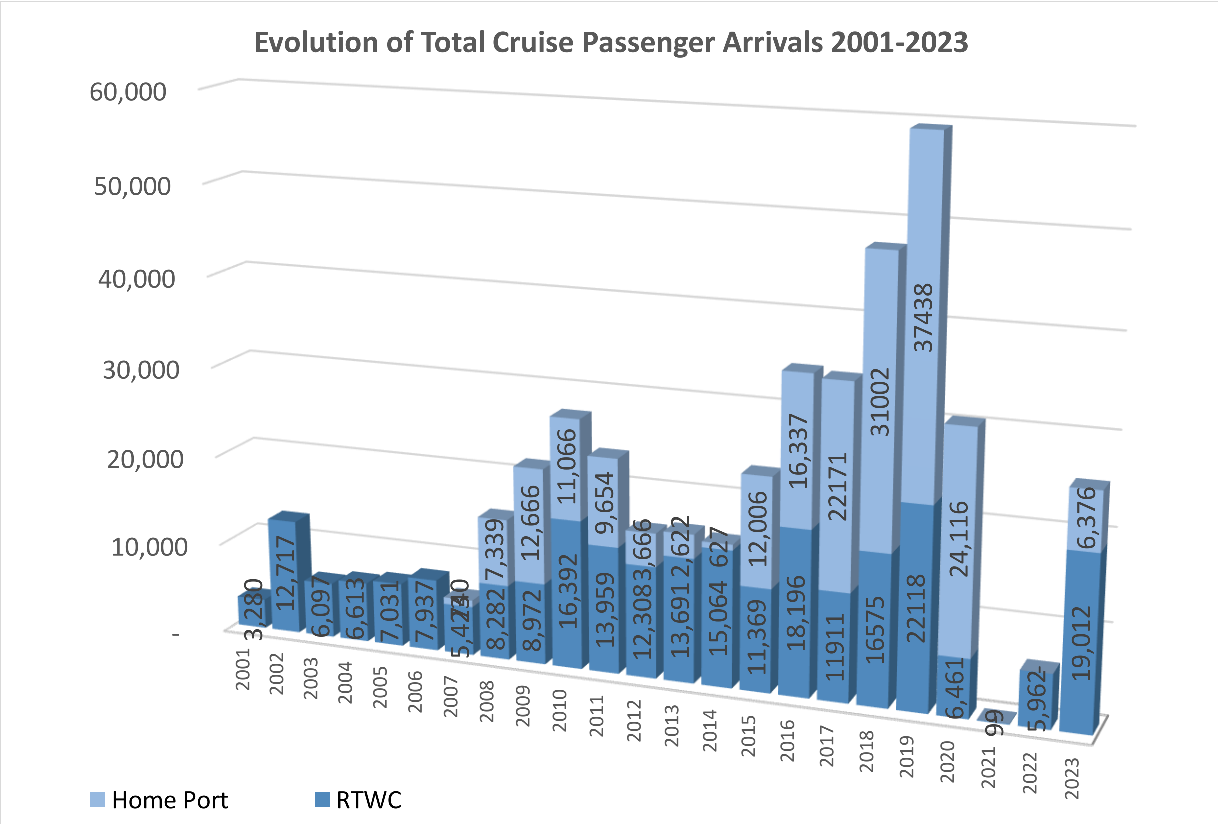
Table 32

	Total Cruise Passengers				Total Cruise Calls			
	CY2022	CY2023	Difference	% Change	CY2022	CY2023	Difference	% Change
Round The World	5,962	19,012	13,050	218.9	8	24	16	200.0
Home-Porting	0	6,376	6,376	0.0	0	3	3	0.0
Total	5,962	25,388	19,426	325.8	8	27	19	237.5

Cruise Passengers Arrivals

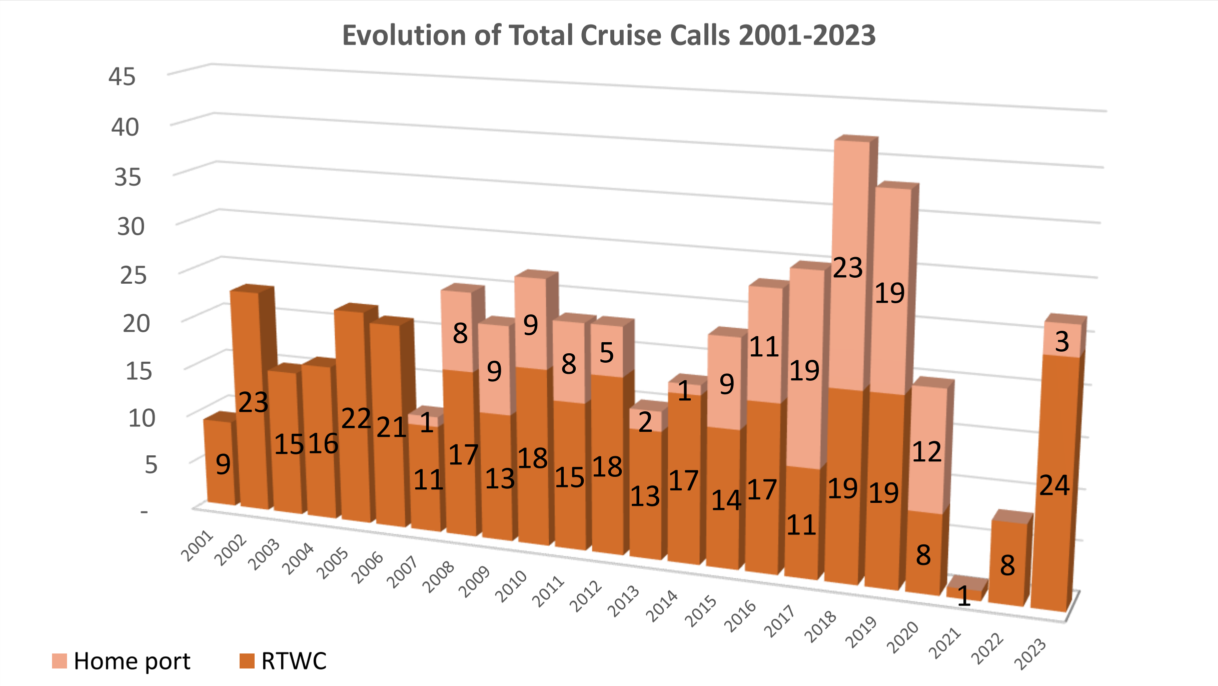
Cruise passenger arrivals expanded rapidly from 5,962 in CY2022 to 25,388 in CY2023, underpinned mainly by the WHO's announcement in May 2023 that is the COVID 19 is no longer considered to be a 'global health emergency' as well as resumption of home-porting activities by AIDA cruises in Nov 2023.

Figure 7 depicts the evolution of number of passenger arrivals both in homeporting (HP) and Round the World cruises (RTW) from 2001-2023



Cruise Vessel Calls

During the calendar year 2023, a total of 27 cruise vessel calls was registered against 8 in CY2022, representing an increase of 237.5%. Figure 6 depicts the evolution of number of calls made by homeporting and Round the World cruises from 2001-2023.



8.2 Calls at Outer Harbour

The number of vessels calling Outer Harbour registered an increase from 1,207 calls during the CY2022 to 1,411 vessel calls for the year CY2023.

Table 33 below shows the breakdown of the vessels calling at the outer harbour for activities such as bunkering purposes, crew change, repairs and inspection of cargo or vessel hull conditions, provision of fresh water supply and ship-chandler, amongst others.

Table 33: Total Calls Outer Harbour - CY2022 v/s CY2023

	CY2022	CY2023	Difference	% Change
Bunkering Only	726	850	124	17.1
Crew Change	213	255	42	19.7
Ship Stores	69	73	4	5.8
Repairs or Inspection	110	110	0	0
Others	89	123	34	38.2
Total	**1,207**	**1411**	**204**	**16.9**

Albeit the total vessel calls at outer harbour for the calendar year under review registered a double-digit growth of 16.9%, with the exception of repairs, the remaining traffic is still below the pre pandemic level.

9. PERFORMANCE AT MULTI PURPOSE TERMINAL

9.1 Key Performance Indicators

Table 34: Key Performance Indicators at MPT - CY2022 v/s CY2023

	CY2022	CY2023
No. of Vessel Calls	6	1
No. of Containers	2,272	358
Avg. Moves /Gross Gang hr	4.8	4.7

- During CY2023, 1 container vessel calls was registered at the MPT and some 358 TEUs were handled in comparison with 6 container vessels and 2,272 TEUs handled in CY2022.
- In CY2023, the average productivity stood at 4.7 moves/gross gang hour as compared to 4.8 recorded in CY2022.

9.2 Inter-Island Trade

Vessels plying between the dependencies of Mauritius (Rodrigues and Agalega) made 58 calls and handled some 14,557 TEUs in CY2023 as depicted in the Table 35.

Table 35: Intra trade traffic of Mauritius– CY2022 v/s CY2023

	CY2022	CY2023
Black Rhino	21	33
Mauritius Trochetia	25	24
Others	2	1
Total No. of Voyages	**48**	**58**
Black Rhino	8,228	11,956
Mauritius Trochetia	4,634	2,377
Others	634	224
Total No. of Containers	**13,496**	**14,557**

9.3 Berth Occupancy @ MPT

Comparative Berth Occupancy for CY2023 versus CY2022 of the various berths at Terminals I and II are depicted in Table 36.

Table 36: Berth Occupancy at MPT - CY2022 v/s CY2023 (%)

Berth	CY2022		CY2023	
	Working	Total Occupied	Working	Total Occupied
Quay No. 1 (Terminal II)	37.7	61.3	23.9	65.2
Quay No. 2 (Terminal II)	38.3	68.4	33.5	79.1
Quay No. 3 (Terminal II)	19.9	58.11	19.6	76.6
Quay No. 4 (Terminal II)	20.8	63.4	18.6	76.5
Quay A (Terminal I)	22.1	78.0	26.2	89.8
Quay D (Terminal I)	9.1	64.5	11.4	77.9
Quay E (Terminal I)	4.3	60.2	4.7	80.2
Bulk Sugar Terminal	4.1	4.3	3.5	9.9
Trou Fanfaron Fishing Quay 1	8.6	99.3	8.5	100
Trou Fanfaron Fishing Quay 2	4.2	98.7	5.8	100
Cruise Jetty	0.0	2.0	0.0	39.6
Oil Jetty	19.9	34.0	22.2	34.3
FDM	34.5	98.0	37.6	98.2
MFD	16.9	83.2	14.6	86

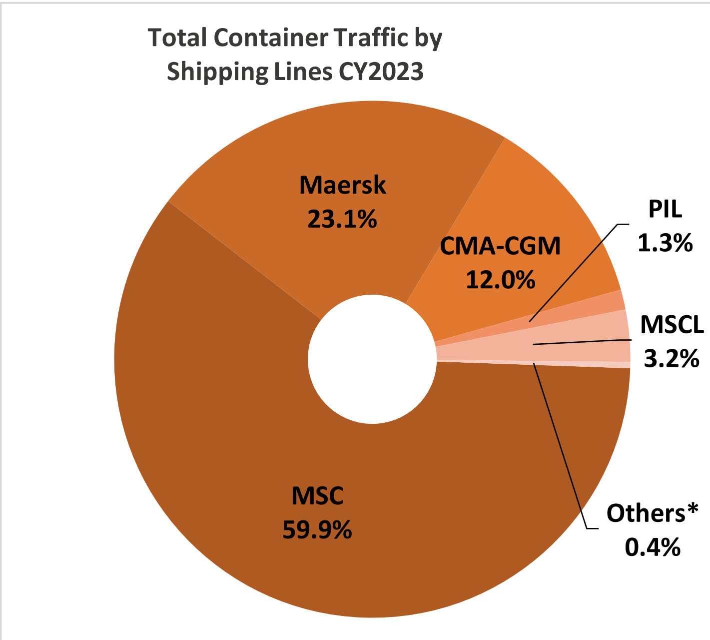
Except for Trou Fanfaron (which is close to 100% on account of high non-working time), the remaining quays have witnessed an increase in their total berth occupancy rates for the calendar year under review. It is to be noted that berth occupancy rates with respect to working only noted a decline at Terminal II while noted an increase at Terminal I.

10. CONTAINER TRAFFIC BY SHIPPING LINES

10.1 Total Container Traffic by Shipping lines – TEUs

Shipping Line	CY2022	% Share	CY2023	% Share	Difference	% Change in Volume
MSC	211,961	52.0	268,779	59.9%	56,818	26.8
Maersk	114,140	28.0	103,770	23.1%	-10,370	-9.1
CMA CGM	61,756	15.1	54,032	12.0%	-7,724	-12.5
PIL	2,832	0.7	5,624	1.3%	2,792	98.6
Mauritius Shipping Corporation Ltd. (MSCL)	13,496	3.3	14,557	3.2%	1,061	7.9
Others *	3,640	0.9	1,764	0.4%	-1,876	-51.5
Total	**407,825**	**100**	**448,526**	**100**	**40,701**	**10.0**

* Others include: UAFL and others



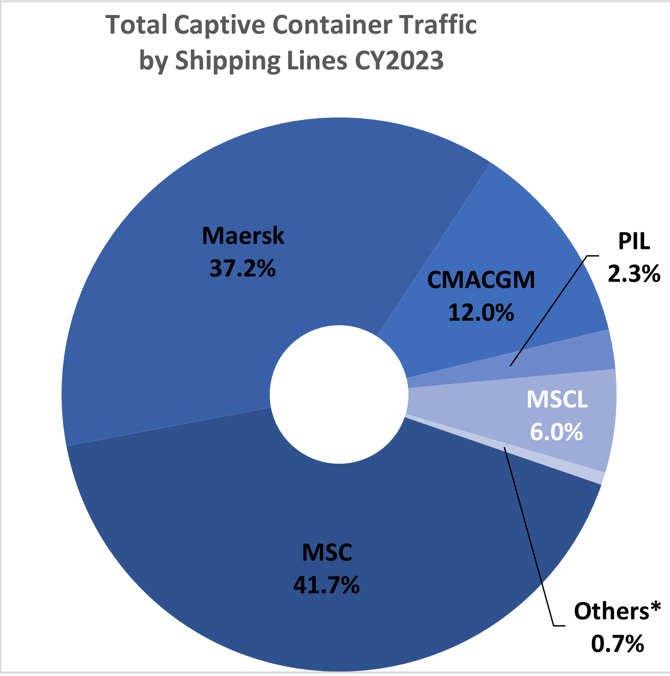
The breakdown of the total container traffic by shipping lines reveals the following:

- MSC's share increased from 52.0 % to 59.9% and its total container traffic volume has increased by 26.8% from 211,961 TEUs in CY2022 to 268,779 TEUs in CY2023.
- On the other hand, Maersk's share in CY2023 stood at 23.1 % lower than the previous year, i.e. 28.0%. A contraction of 9.1% has been noted in its volume for the calendar year under review.
- Similarly, CMA CGM's share in total container traffic has plummeted from 15.1% to 12.0%. Likewise, its volume noted a decline of 12.5%.

10.2. Total Captive Container Traffic by Shipping Lines – TEUs

Shipping Line	CY2022	CY2023	Difference	% Change
MSC	95,292	101,329	6,037	6.33
Maersk	101,131	90,301	-10,830	-10.7
CMA CGM	31,426	29,126	-2,300	-7.3
PIL	5,123	5,624	501	9.8
MSCL	13,496	14,557	1,061	7.9
Others *	1,348	1,764	416	30.9
Total	**247,816**	**242,701**	**-5,115**	**-2.1**

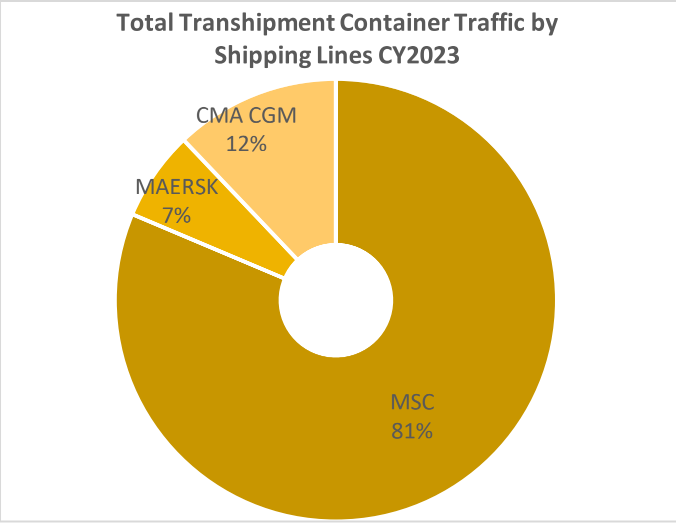
* Others include: UAFL and others



Total captive container traffic contracted by 2.1% from 247,816 TEUs in CY2022 to 242,701 TEUs in CY2023.

10.3 Total Transhipment Traffic by Shipping Lines - TEUs

Shipping Line	CY2022	CY2023	Difference	% Change
MSC	116,669	167,450	50,781	43.5
Maersk	13,009	13,469	460	3.5
CMA CGM	30,330	24,906	-5,424	-17.9
Others	1	0	-1	-100
Total	**160,009**	**205,825**	**45,816**	**28.6**



Total transhipment (inwards only) container traffic has noted an expansion to the tune of 28.6% for the calendar year under review.

It is worth noting that MSC and Maersk recorded expansions to the tune of 43.5% and 3.5% respectively in their transhipment volume in CY2023.

Conversely, CMA CGM's volume noted a contraction of 17.9%.

11. MARKET SHARE BY MAJOR SHIPPING LINES

Table 37 shows the change in market share in different segments.

Table 37: Comparative Traffic Share in Container Traffic - CY2022 v/s CY2023

	Share CY2022	Share CY2023
MSC		
Total Container Traffic	52.0	59.9
Total Captive Container Traffic	38.5	41.7
Total Transhipment Container Traffic	72.9	81.3
Maersk		
Total Container Traffic	28.0	23.1
Total Captive Container Traffic	40.8	37.2
Total Transhipment Container Traffic	8.1	6.5
CMA CGM		
Total Container Traffic	15.1	12.0
Total Captive Container Traffic	12.7	12.0
Total Transhipment Container Traffic	19.0	12.1

In CY2023, the distribution of the container traffic amongst the main line operators are as follows:

- Total Container Traffic: MSC held 59.9% of the market share followed by Maersk with a share of 23.1 % and CMA CGM with a share of 12.0% in CY2023.

- Total Captive Container Traffic: MSC's with a market share of 41.7% compared to Maersk's share of 37.2% and CMA CGM's share of 12.0% in CY2023.

- Total Transhipment Container Traffic: MSC which holds the lion share, stood at 81.3% in CY2023 followed by CMA CGM and Maersk with market share of 12.1% and 6.5%, respectively.

12 TRANSHIPMENT ACTIVITIES BY SHIPPING LINES

12.1 Mediterranean Shipping Company Ltd (MSC)

Table 38: MSC Transhipment Inwards (TEUs)

	CY2022	CY2023	Difference	% Change
Laden	89,627	124,149	34,522	38.5
Empty	27,042	43,301	16,259	60.1
Total	**116,669**	**167,450**	**50,781**	**43.5**

Some 167,450 TEUs were transhipped by MSC during the current calendar year as compared to 116,669 TEUs in CY2021, i.e. a significant growth of 43.5%.

12.2 Maersk Line

Table 39: Maersk Transhipment Inwards (TEUs)

	CY2022	CY2023	Difference	% Change
Laden	9,945	11,464	1,519	15.3
Empty	3,464	2,005	-1,459	-42.1
Total	**13,009**	**13,469**	**460**	**3.5**

The number of TEUs transhipped by Maersk Shipping Line increase from 13,009 TEUs in CY2022 to 13,469 TEUs in CY2023, representing a growth of 3.5%.

12.3 CMA-CGM

Table 40: CMA-CGM Transhipment Inwards (TEUs)

	CY2022	CY2023	Difference	% Change
Laden	19,962	18,454	-1,508	-7.5
Empty	10,368	6,452	-3,916	-37.8
Total	**30,330**	**24,906**	**-5,424**	**-17.9**

The number of TEUs transhipped by CMA CGM decreased from 30,330 TEUs in CY2022 to 24,906 TEUs in CY2023.

13. DOWNTIME AT PORT

During the calendar year under review, handling operations were disrupted at the port for about 10.8 days (cyclone Freddy) in CY2023 compared to 22.4 days (cyclones Batsirai & Emnati) registered in CY2022 owing to adverse weather conditions like cyclones, swell conditions, heavy rainfall or strong gusts.

14. SHIPPING SERVICES CY2023

CONTAINER LINERS	WEEKLY SERVICE	MAIN PORTS OF CALL
1. Mediterranean Shipping Company (Mauritius) Ltd. MSC House Old Quay D Road Port Louis Tel : (230) 202 6800 Fax : (230) 217 4747	1. Europe to Australia Service (VSA with CMA-CGM NEMO Service)	London Gateway, Antwerp, Rotterdam, Le Havre, Fos Sur Mer, La Spezia, Gioia Tauro, Messina, Marsaxlokk, Reunion, **Port Louis**, Sydney, Melbourne, Adelaide, Fremantle, Singapore, Colombo, Suez Canal to European Ports
	2. INGWE Southbound Service	Qingdao, Shanghai, Ningbo, Shekou, Singapore, Mundra, **Port Louis,** Durban
	3. INGWE Northbound Service	Durban, Coega, **Port Louis,** Colombo, Singapore, Qingdao
	4. Ilanga Express Service (on & off)	Mundra, Hazira, Colombo, P**ort Louis, D**urban, Jebel Ali
	5. Zambezi Express Service	***Port Louis,*** *Beira, Maputo,* ***Port Louis***
	6. Indian Ocean Islands 2 (Fortnightly)	***Port Louis****, Longoni, Majunga, Diego Suarez,* ***Port Louis***
	7. Indian Ocean Islands 3	***Port Louis****, Tamatave, Réunion,* ***Port Louis***
	8. Indian Ocean Islands 4 (Fortnightly)	***Port Louis****, Nacala, Moroni,* ***Port Louis***
2. Maersk (Mauritius) Ltd. MFD Building Freeport Zone 5 Mer Rouge Port Louis Tel. : (230) 206 2200 Fax : (230) 206 2210	1. Safari Service 2. (Slot chartering by CMA-CGM Shaka Service)	Tanjung Pelepas, **Port Louis**, Durban, Tanjung Pelepas, Hong Kong, Shanghai, Ningbo.
	3. Indian Ocean Islands (Slot chartering by DAL/ UAFL)	Salalah, Réunion, **Port Louis,** Toamasina, Port Victoria.
	4. M-Express (VSA with CMA-CGM Mozex Service)	Réunion, Maputo, Beira, **Port Louis,** Singapore, Tanjung Pelepas
3. CMA-CGM (Mauritius) Ltd Block 3, Zone 5 MFD Building Mer Rouge Port Louis, Tel: (230) 203 4350 Fax: (230) 217 8251/ 2080245	*1. IOI Feeder 2*	*Pointe des Galets, Tamatave,* ***Port Louis,*** *Reunion.*
	2. IOI Feeder 1/5	*Longoni, Majunga, Nosy Be, Diego Suarez, Pointe Des Galets* ***Port Louis,*** *Pointe Des Galets*
	3.IOI Feeder 3 (Fortnightly)	*Tulear, Ehola,* ***Port Louis****, Pointe Des Galets.*

CONTAINER LINERS	WEEKLY SERVICE	MAIN PORTS OF CALL
4. PIL **5. UAFL/ DAL** <u>Agent:</u> Scott Shipping International Ltd Ground Floor, IKS House Marine Road Port Louis Tel: (230) 216 3042 Fax: (230) 216 0045	MZS Service Indian Ocean Islands (Slot chartering with Maersk)	Singapore, , **Port Louis,** Réunion, Tamatave, Nacala, Beira ,Maputo Singapore Salalah, Réunion, **Port Louis,** Toamasina, Port Victoria.

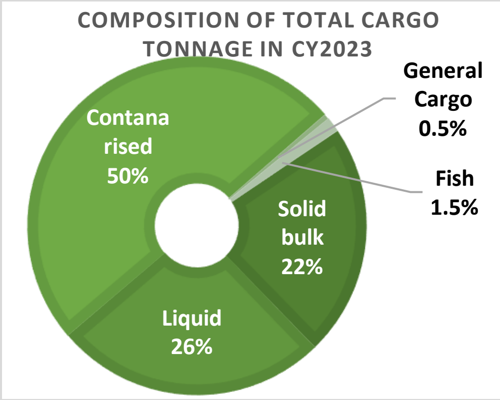
INTER-ISLAND TRADE	FREQUENCY	MAIN PORTS OF CALL
Mauritius Shipping Corporation Ltd 1st & 2nd Floor, Capitainerie Building, Quay D, Port Louis, 11601 Tel:(230) 217 2285 Fax: (230) 242 5245	Every 10 – 15 days by M.V Black Rhino 1 voyage per month by M.V Mauritius Trochetia + additional upon request	Port Louis, Rodrigues, Port Louis Port Louis, Agalega, Port Louis

Pure Car Carriers – Monthly Calls

SHIPPING LINE	MAIN PORTS OF CALL	SHIPPING LINE	MAIN PORTS OF CALL	SHIPPING LINE	MAIN PORTS OF CALL
Hoegh Auto Liner <u>Agent:</u> Southern Marine & Co. Ltd 3rd Floor, Capitainerie Building Quay D Port Louis Tel:(230) 216 0272 Fax:(230) 216 1020	European ports, South African ports, Tamatave, Reunion, **Port Louis,** Australia ports	**Mitsui O.S.K. Line (MOL)** <u>Agent:</u> Blyth Brothers & Co. Ltd. 8, Dr Ferrière St. Port Louis Tel : (230) 212 5134 Fax : (230) 208 0879	Japan, Singapore, Mombasa, Dar es Salaam, Maputo, Durban, Tamatave, Pointe des Galets, **Port Louis** *(slot sharing agreement with K-Line represented by Scott Shipping International Ltd)*	**GLOVIS** <u>Agent:</u> Sharaf Shipping Agency Ltd Pin Point Building Verdun Motorway M3, Riviere Des Calebasses Tel :(230) 2458549	Korea, China, Singapore, Egypt, Slovenia, Greece, Egypt, Sri Lanka, **Port Louis,** Durban

APPENDIX 1: COMPOSITION OF TOTAL CARGO TRAFFIC CY2023

A. Total Cargo



Total Cargo Traffic (Dry Bulk, Liquid Bulk, Containerised Cargo and General Cargo) handled in the Port expanded by 4.6% from 7,640,827 tonnes in CY2022 to reach 7,983,513 tonnes in CY2023.

Cargo (Bagged + Coal + Fertilizer + Maize + Soya Bean Meal + Sugar + Urea + Break Bulk + Inter-Island + Containerised + Fish) handled by CHCL amounted to 5,074,296 tonnes, equivalent to 63.5% of Total Cargo Traffic.

B. Total Bulk Cargo

Total Bulk cargo (Dry & Liquid) decreased from 3,921,466 tonnes in CY2022 to 3,854,785 tonnes in CY2023, representing a reduction of 1.7%.

Total Bulk Cargo CY2022 v/s CY2023 (tonnes)

	CY2022	CY2023	Difference	% Change
Dry Bulk	1,792,337	1,773,745	-18,592	-1.0
Liquid Bulk	2,129,129	2,081,040	-48,089	-2.3
Total	**3,921,466**	**3,854,785**	**-66,681**	**-1.7**

B.1 Dry Bulk Cargo

Total Dry Bulk, comprising only import cargo, fell from 1,792,337 tonnes in CY2022 to 1,773,745 tonnes in CY2023.

B.2 Liquid Bulk Cargo

Total Liquid Bulk also registered a drop from 2,129,129 tonnes in CY2022 to 2,081,040 tonnes in CY2023, i.e. a reduction of 2.3%, equivalent to 48,089 tonnes.

Total Liquid Bulk Cargo CY2022 v/s CY2023 (tonnes)

	CY2022	CY2023	Difference	% Change
Imports	1,636,637	1,568,336	-68,301	-4.2
Exports	492,492	512,704	20,212	4.1
Total	**2,129,129**	**2,081,040**	**-48,089**	**-2.3**

C. Containerised Cargo

Total Containerised Cargo increased from 3,544,374 tonnes in CY2022 to 3,971,646 tonnes in CY2023, representing a growth of 12.1 % as summarised below.

Containerised Cargo Traffic CY2022 v/s CY2023 (tonnes)

	CY2022	CY2023	Difference	% Change
Imports	1,404,585	1,446,253	41,668	3.0
Exports	673,237	628,828	-44,409	-6.6
Transhipment (inwards)	1,466,552	1,896,565	430,013	29.3
Total	**3,544,374**	**3,971,646**	427,272	12.1

D. General Cargo Traffic

General Cargo, comprising transhipment inwards, inter-island, bagged cargo and unitised break bulk, witnessed a drop of 20.9% (equivalent to 10,818 tonnes) from 51,749 tonnes in CY2022 to 40,931 tonnes in CY2023.

General Cargo Traffic CY2022 v/s CY2023 (tonnes)

	CY2022	CY2023	Difference	% Change
Imports	47,520	35,644	-11,876	-25.0
Exports	4,229	5,287	1,058	25.0
Total	**51,749**	**40,931**	**-10,818**	**-20.9**

E. Fish Traffic

Total Fish Traffic contracted by 5.8% from 123,238 tonnes in CY2022 to 116,151 tonnes in CY2023.

Total Fish Traffic CY2022 v/s CY2023 (tonnes)

	CY2022	CY2023	Difference	% Change
Tuna Processing	71,596	69,044	-2,552	-3.6
Local Market	2,402	3,038	636	26.5
Transhipment Inwards	38,154	39,650	1,495	3.9
Direct Transhipment Inwards (ship to ship)	5,543	2,210	-3,333	-60.1
Direct Transhipment Outwards (ship to ship)	5,543	2,210	-3,333	-60.1
Grand Total	**123,238**	**116,151**	**-7,088**	**-5.8**