Port Trade Performance
FY21/22 versus FY22/23

29.08.2023

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Port Trade Performance FY22/23

1. KEY FIGURES AT A GLANCE

Total Trade Volume	**7.5**	**Million tonnes**	**(-1.7%)**
• Containerised Cargo	3.6	Million tonnes	(-1.2%)
• Dry Bulk Cargo	1.7	Million tonnes	(-5.4%)
• Liquid Bulk Cargo	2.0	Million tonnes	(-4.9%)
• Fish Traffic	131,139	tonnes	(+30.4%)
Total Container Traffic	**420,394**	**TEUs**	**(+3.0%)**
• Captive Container	247,637	TEUs	(+5.8%)
• Transhipment Container Inwards	172,757	TEUs	(-0.8%)
• Transhipment Container Outwards	170,620	TEUs	(- 4.9%)
Total Container Throughput (incl. paid restows)	**602,941**	**TEUs**	**(-0.1%)**
Total Vessel Traffic	2,713	calls	(+5.2%)
• Containerised Vessels	496	calls	(+14.0%)
• Fishing Vessels	758	calls	(+9.1%)
• Cruise Traffic	22	calls	(+100.0%)
Total Bunker Traffic	**426,504**	**tonnes**	**(-28.3%)**
• Pipeline	56,322	tonnes	(-38.1%)
• Barges	370,182	tonnes	(-26.5%)

2. INTRODUCTION

The Global economic recovery from the COVID-19 pandemic and Russia's invasion of Ukraine is slowing as global growth is projected to decline from an estimated 3.5 percent in 2022 to 3.0 in 2023, according to IMF, World Economic Outlook July 2023. The World Health Organisation announced in May 2023 that it no longer considers COVID-19 to be a 'global health Emergency. Inflation remains high and continues to erode household purchasing power. In the same vein, it has been reported that supply chains have largely recovered, and shipping costs and supplier's delivery times are back to pre-pandemic levels.

According to WTO economists, the growth in merchandise trade volume is estimated at 2.7% in 2022 and for 2023, it is projected to be around 1.7%, weighed down by the effects of the war in Ukraine, stubbornly high inflation, tighter monetary policy and financial market uncertainty.

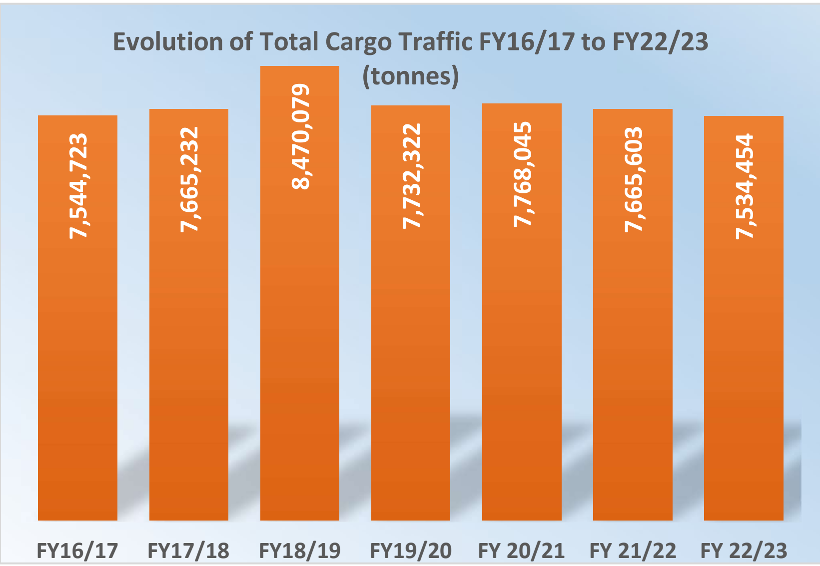
On the domestic front, the GDP at market prices is forecasted to growth by 5.3% in 2023 after a growth of 8.8% in 2022. Household consumption spending would continue to be impacted by the high inflationary environment with the rising interest rate and prices also taking a toll on private sector investment. From a sectoral perspective, although the economic recovery supported by greater dynamism across key sectors, notably the tourism sector, it is to be noted that the outlook for the textile manufacturing sector has been downgraded in view of economic slowdown in our trading partners.

The difficult external economic environment has taken its toll on the port trade performance whereby the total cargo traffic went down by 1.7% from 7,665,603 tonnes in FY21/22 to 7,534,454 tonnes in FY22/23.

The total container traffic has witnessed an expansion of 3.0% and reached 420,394 TEUs in FY22/23 as compared to 408,145 TEUs in FY21/22. For the period under review, whilst captive container traffic expanded by around 5.8% whilst transhipment container traffic posted a negative growth of 0.8%.

The port witnessed a growth of 5.2% in the total vessels calls, from 2,578 in FY21/22 to 2,713 in FY22/23, mainly driven by the significant expansion in container and local fishing vessels calls.

3. TOTAL CARGO TRAFFIC



Total Cargo tonnage handled in the port declined by 1.7%, equivalent to 131,149 tonnes.

It stood at 7,534,454 tonnes in FY22/23 as compared to 7,665,603 tonnes in FY21/22, as summarised in Table 1.

Table 1: -Total Cargo Traffic – FY21/22 v/s FY22/23 (tonnes)

	FY21/22	FY22/23	Difference	% Change
Total Imports	4,831,414	4,893,528	62,114	1.3
Total Exports	1,257,758	1,097,659	-160,099	-12.7
Total Containerised Transhipment Inwards	1,576,431	1,543,267	-33,164	-2.1
Total	**7,665,603**	**7,534,454**	**-131,149**	**-1.7**

Total Imports
Total Imports Traffic grew by 1.3% from 4,831,414 tonnes in FY21/22 to reach 4,893,528 tonnes in FY22/23. Expansions recorded in the following segments, namely liquid bulk (+4.3%), containerised cargo (5.1%), fish (+29%) more than offset the contractions recorded in general cargo (-3.6%) and solid bulk (-5.4%).

Total Exports
Total exports have contracted by 12.7% and stood at 1,097,659 tonnes in FY22/23 as compared 1,257,758 to tonnes in FY21/22. It should be noted that contractions recorded in the following segments, namely liquid bulk (-28.3%), and general cargo (9.9%) more than offset the expansions noted in containerised cargo (+1.2%) and fish exports (+79%).

Total Containerised Transhipment Inwards
Total Containerised Transhipment Inwards traffic declined from 1,576,431 tonnes in FY21/22 to 1,543,267 tonnes in FY22/23, a decrease of 2.1% equivalent to 33,164 tonnes.

4. TOTAL IMPORTS

Total Imports expanded by 1.3% with 4,893,528 tonnes in FY22/23 as compared to 4,831,414 tonnes in FY21/22. Table 2 illustrates the breakdown of Total Imports.

Table 2: Breakdown of Total Imports FY21/22 v/s FY22/23 (tonnes)

Imports	FY21/22	FY22/23	Difference	% Change
Solid Bulk	1,818,899	1,720,537	-98,362	-5.4
Liquid Bulk	1,524,364	1,589,186	64,822	4.3
Containerised	1,347,375	1,416,253	68,878	5.1
Fish	97,691	126,000	28,309	29.0
General cargo	43,085	41,552	-1533	-3.6
Total	**4,831,414**	**4,893,528**	**62,114**	**1.3**

4.1 Solid (Dry) Bulk Imports

Solid bulk imports have witnessed a contraction of 5.4%, equivalent to 98,362 tonnes, from 1,818,899 tonnes in FY21/22 to 1,720,537 tonnes in FY22/23 as detailed in Table 3.

Table 3: Solid Bulk Imports – FY21/22 v/s FY22/23 (tonnes)

	FY21/22	FY22/23	Difference	% Change
Coal	637,519	515,092	-122,427	-19.2
Cement	768,742	745,138	-23,604	-3.1
Wheat	152,106	153,053	947	0.6
Sugar	84,000	126,000	42,000	50.0
Maize	110,794	125,000	14,206	12.8
Soya Bean Meal	65,738	56,254	-9,484	-14.4
Total	**1,818,899**	**1,720,537**	**-98,362**	**-5.4**

- Coal imports showed a decrease of 19.2%, with 515,092 tonnes in FY22/23 as compared to 637,519 tonnes in FY21/22, reflecting the suspension of power generating activities by one of the major IPPs, namely, Terragen Ltd for the period April 2022 to April 2023.

- Bulk Cement imports illustrate a decrease of 3.1% with 745,138 tonnes in FY22/23 as compared to 768,742 tonnes in FY21/22 resulting in a contraction of 23,604 tonnes, reflecting the contraction of 5.4% and 7.1% recorded in the construction sector in third and fourth quarter of 2022.

- For the year under review, imports of wheat increased marginally by 0.6% from 152,106 tonnes in FY21/22 to 153,053 tonnes in FY22/23, reflecting mainly the award of the full contract by STC to LMLC.

- Bulk sugar import expanded to 126,000 tonnes in FY22/23 compared to 84,000 tonnes in FY21/22 showing an increase of 42,000 tonnes, driven by the contraction of 10.9% in sugar production in 2022. (National Accounts Estimates, June 2023)

- Maize and soya bean meal are mainly used in the production of animal feed for chicken. For the year under review, maize imports have expanded by 12.8% whilst soya bean meal imports contracted by 14.4%.

4.2 Liquid Bulk Imports

Total imports of liquid bulk increased by 4.3%, representing 64,822 tonnes, i.e., from 1,524,364 tonnes in FY21/22 to 1,589,186 tonnes in FY22/23 as summarised in table 4.

Table 4: Liquid Bulk Imports - FY21/22 v/s FY22/23 (tonnes)

	FY21/22	FY22/23	Difference	% Change
White oil	658,951	763,943	104,992	15.9
Black oil	747,794	713,939	-33,855	-4.5
LPG	90,769	82,528	-8,241	-9.1
Edible oil	18,984	22,500	3,516	18.5
Bitumen	7,866	6,276	-1,590	-20.2
Total	**1,524,364**	**1,589,186**	**64,822**	**4.3**

- Imports of White oil noted an expansion of 15.9% from 658,951 tonnes in FY21/22 to 763,943 tonnes in FY22/23, reflecting the significant increase in JET A1 following the rapid recovery of the tourism sector with 1,300,000 tourist arrivals in 2023 compared to 997,290 in 2022, according to National Accounts Estimates June 2023.

- Imports of Black oil contracted from 747,794 tonnes in FY21/22 to 713,939 tonnes in FY22/23, representing a decline of 4.5%. This contraction is mainly due to the significant decline in bunker sales volumes which more than offset the expansion on the import volumes of heavy fuel oil following the suspension of supplying electricity to the national grid for the period April 2022 to April 2023.

- Imports of LPG declined by 9.1% from 90,769 tonnes in FY21/22 to 82,528 tonnes in FY22/23, reflecting the decline in industrial demand following rising price of LPG on the world market in the wake of sanctions being imposed on Russia.

- For the year under review, imports of Edible Oil progressed by 18.5 % from 18,984 tonnes to 22,500 tonnes, reflecting the double-digit growth in the hospitality sector, according to National Accounts Estimates June 2023.

- Bitumen imports has dropped down by 20.2 % review with 7,866 tonnes in FY21/22 and 6,276 tonnes in FY22/23, reflecting the decline of 1.4% in the public sector investment for the year 2022 according to National Accounts Estimates June 2023.

4.3 Containerised Cargo Imports

Total containerised imports noted an of 5.1%. The breakdown of this traffic in Table 5 reveals that both captive and inter island containerised cargo imports show an expansion of 4.8% and 31.3%, respectively.

Table 5: Containerised Cargo Imports – FY21/22 v/s FY22/23 (tonnes)

	FY21/22	FY22/23	Difference	% Change
Captive	1,333,233	1,397,678	64,445	4.8
Inter-Island	14,142	18,575	4,433	31.3
Total	**1,347,375**	**1,416,253**	**68,878**	**5.1**

4.4 General Cargo Imports

Total General Cargo Imports witnessed a decrease of 3.6%. The breakdown of this traffic in Table 6 shows that unitized break bulk has declined by 6.5% whilst inter-island general cargo has witnessed an expansion of 276%.

Table 6: General Cargo Imports – FY21/22 v/s FY22/23 (tonnes)

	FY21/22	FY22/23	Difference	% Change
Unitized Break Bulk	42,636	39,866	-2770	-6.5
Inter-Island	449	1,686	1237	276.0
Total	**43,085**	**41,552**	**-1533**	**-3.6**

4.5 Fish Traffic Imports

Total fish imports posted an increase of 30% with 126,000 tonnes in FY22/23 as compared to 97,691 tonnes in FY21/22.

On the other hand, it is worth noting that the total number of fishing vessels calling at Port Louis have increased from 673 calls in FY21/22 to 732 calls recorded in FY22/23, representing an increase of 9%, driven mainly by the significant increase in the local market and direct transhipment segments.

Table 7: Fish Traffic Imports - FY21/22 v/s FY22/23 (tonnes)

	Volume (tonnes)				Vessel Calls			
	FY21/22	FY22/23	Difference	% Change	FY21/22	FY22/23	Difference	% Change
Tuna/ Loin Processing	57,195	83,819	26,624	46.5	26	27	1	4
Bank fishing	1,617	2,667	1,050	64.9	226	270	44	19
Transhipment Inwards	36,010	34,375	-1,635	-4.5	339	291	-48	14
Direct Transhipment Inwards	2,869	5,139	2,270	79.1	82	144	62	76
Total	**97,691**	**126,000**	**28,309**	**29.0**	**673**	**732**	**59**	**9**

- Imports of Tuna as raw materials by Princess Tuna and Thon des Mascareignes increased by 26,624 tonnes from 57,195 tonnes in FY21/22 to 83,819 tonnes in FY22/23. It is to be noted that this traffic is still below the pre pandemic level which stood at 96,306 as part of raw materials is being imported in reefer containers instead of reefer fish carriers from Seychelles.

- Conversely, catch in our oceanic banks, mainly meant for the local market, has shown a significant rise by 64.9%, from 1,617 tonnes in FY21/22 to 2,667 tonnes in FY22/23, reflecting both higher parcel load from 7.1 to 9.9 tonnes and increase in the number of fishing campaigns as shown by the increase in the number of fishing vessel calls for the period under review.

- Fish transhipment activity has decreased by 4.5% with 34,375 tonnes in FY22/23 against 38,016 tonnes recorded in FY21/22. This traffic which is still below its pre-pandemic level (55,000 tonnes) weighed down mainly by high licence fees, the imposition of restriction to carry bunkers in fish holds as well as undertaking direct transhipment at high seas which are allowed according to IOTC regulations.

- On the other hand, direct ship to ship transhipment has gone up from 2,869 tonnes in FY21/22 to 5,139 tonnes recorded during the current financial year, representing an increase of 79.1%, driven by the increase in the number of vessels undertaking direct transhipment activities at Port Louis.

5. TOTAL EXPORTS

Total exports contracted by 12.7% and stood at 1,097,659 tonnes in FY22/23 as compared to 1,257,758 tonnes in FY21/22.

Table 8: Breakdown of Total Bulk Exports - FY21/22 v/s FY22/23 (tonnes)

Exports	FY21/22	FY22/23	Difference	% Change
Liquid Bulk	598,842	429,370	-169,472	-28.3%
Containerised	650,465	658,120	7,655	1.2%
General cargo	5,582	5030	-552	-9.9%
Fish	2,869	5,139	2,270	79.1
Total	**-1,257,758**	**1,097,659**	**-160,099**	**-12.7%**

5.1 Liquid Bulk Exports

Exports of Liquid Bulk cargo registered a negative growth of 28.3% from 598,842 tonnes in FY21/22 to 429,370 tonnes in FY22/23, equivalent to -169,472 tonnes as detailed in Table 9.

Table 9: Breakdown of Liquid Bulk Exports - FY21/22 v/s FY22/23 (tonnes)

	FY21/22	FY22/23	Difference	% Change
Total Bunker	594,818	426,504	-168,314	-28.3%
Ethanol	4,024	0	-4,024	-
White Oil	0	2,866	2,866	-
Grand Total	**598,842**	**429,370**	**-169,472**	-28.3%

Total bunker exports, which account for the most of bulk of total bulk liquid exports, witnessed a reduction of 28.3%, equivalent to a decrease of some 168,314 tonnes. The breakdown hereunder reveals refuelling activities at Port Louis were badly hit.

5.1.1 Bunkering Activities

Total volume of bunker decreased by 28.3% from 594,818 tonnes in FY21/22 to 426,504 tonnes in FY22/23 as outlined in the figure below and Table 10.

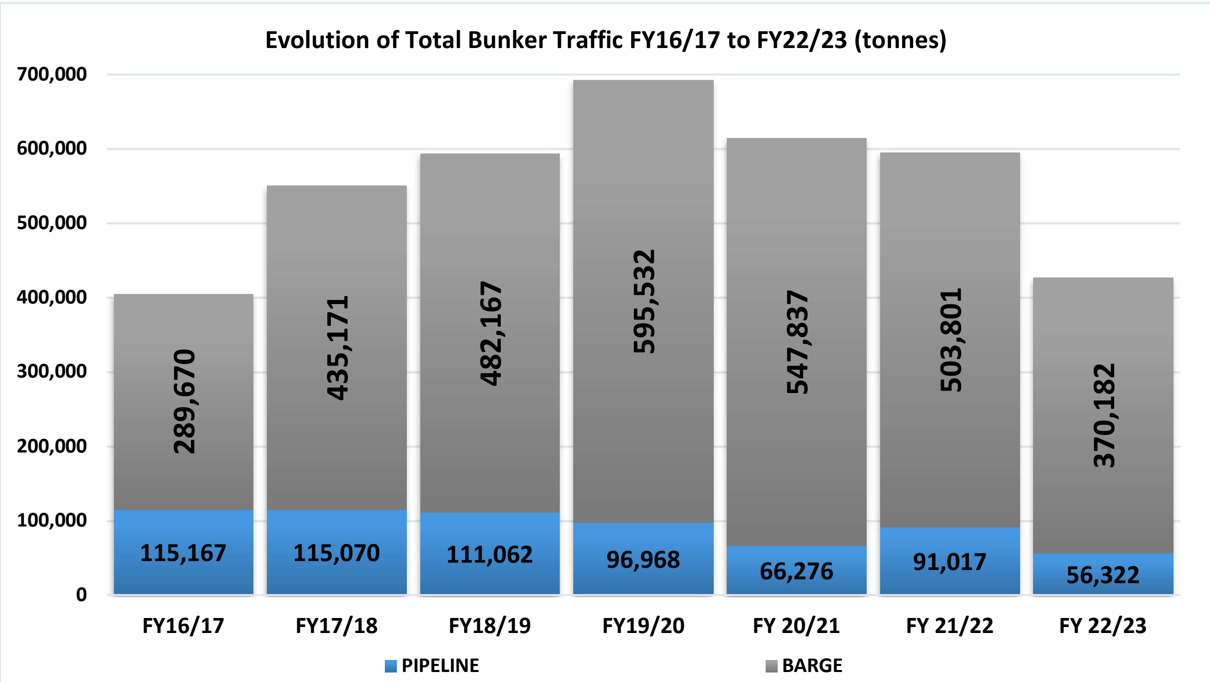


Table 10: Total Bunker Exports – FY21/22 v/s FY22/23

	Volume in Tonnes				Vessel Calls			
	FY21/22	FY22/23	Difference	% Change	FY21/22	FY22/23	Difference	% Change
Bunker by pipeline	91,017	56,322	-34,695	-38.1	955	894	-61	-6.4
Bunker by barge	503,801	370,182	-133,619	-26.5	951	918	-33	-3.5
Total	**594,818**	**426,504**	**-168,314**	**-28.3**	**1,906**	**1,812**	**-94**	**-4.9**

Bunker Volume

- Table 10 shows that volume of bunker by pipeline has noted a significant decrease of 38.1% and stood at 56,322 tonnes in FY22/23 against 91,017 tonnes in FY21/22. This is attributed to both lower average parcel size as well as decrease in the number of vessels refuelling by pipeline which has noted 6.4% during the financial year under review.
- The exports of Bunker by barge, which accounts for the bulk of total bunkers, has tumbled from 503,801 tonnes in FY21/22 to 370,182 tonnes in FY22/23, representing a reduction of 26.5%.

  This dismal performance is largely attributed to the slower global trade growth, disruption in shipping pattern in the wake of Ukraine-Russia war, sanctions as well as growing competition from regional bunkering hubs and unavailability of storage facilities resulting to suboptimal marketing and sourcing strategies. It is to be noted that booming black market for oil following sanctions on the oil exports of Venezuela, Iran and Russia could potentially send the sector reeling owing to scrupulous traders from these countries.

Bunker Calls

The total number of vessels refuelling at Port Louis has decreased from 1,906 calls in FY21/22 to 1,812 calls in FY22/23, posting a shortfall of 4.9%.

It has been noted that the breakdown of the number of vessels calling at Port Louis for refuelling reveals the following: both barge and pipeline have contracted by 6.4% and 3.5%, respectively, for the financial period under review.

5.2 Containerised Cargo Exports

Total containerised cargo exports registered a growth of 1.2% from 650,465 tonnes in FY21/22 to 658,120 tonnes in FY22/23. The breakdown of this traffic reveals that both captive and inter-island containerised exports noted expansions of 0.9% and 3.2%, respectively.

Table 11: Containerised Exports – FY21/22 v/s FY22/23 (tonnes)

	FY21/22	FY22/23	Difference	% Change
Captive	567,162	572,192	5,030	0.9%
Inter-Island	83,303	85,928	2,625	3.2%
Total	**650,465**	**658,120**	**7,655**	**1.2%**

5.3 General Cargo Exports

Total General Cargo Exports witnessed a contraction of 9.9%. The breakdown of this traffic shows unitized Break Bulk has significantly increased by 130.4% whilst been noted that Inter-Island segment has shrunk by 26.4%

Table 12: General Cargo Exports – FY21/22 v/s FY22/23 (tonnes)

	FY21/22	FY22/23	Difference	% Change
Unitized Break Bulk	589	1357	768	130.4%
Inter-Island	4,993	3673	-1320	-26.4%
Total	**5,582**	**5030**	**-552**	**-9.9%**

5.4 Fish Traffic Exports

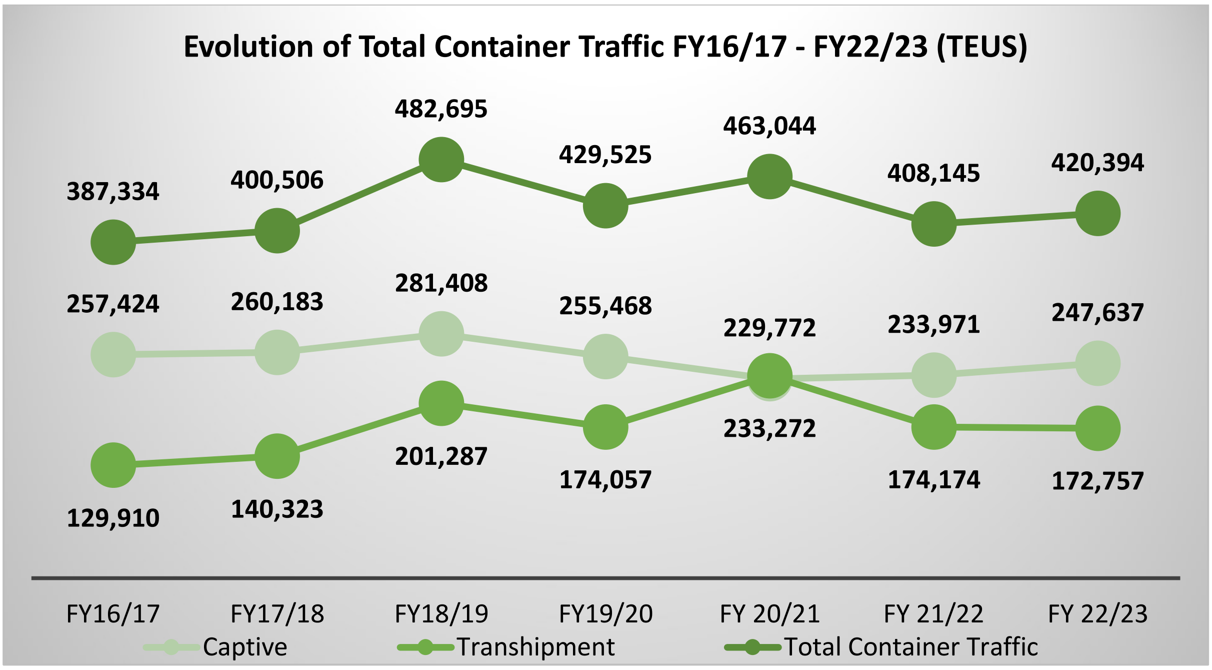
For the year FY22/23, direct transhipment outwards of fish stood at 5,139 tonnes as opposed to 2,869 tonnes in FY21/22, representing a growth of 79.2% and the number of vessels calls have gone up by 18.2% for the financial year under review.

Table 13: Fish Exports – FY21/22 v/s FY22/23 (tonnes)

	Volume in Tonnes				No of vessel Calls			
	FY21/22	FY22/23	Difference	% Change	FY21/22	FY22/23	Difference	% Change
Direct Transhipment outwards (ship to ship)	2,869	5,139	2,270	79.1	22	26	4	18.2%

6. TOTAL CONTAINER TRAFFIC

Total Container Traffic (excluding paid restows) witnessed a growth of 3.0%, equivalent to 12,249 TEUs from 408,145 TEUs in FY21/22 to 420,394 TEUs in FY22/23.



It is worth noting that Captive Container Traffic noted an evolution of 5.8% whilst Transhipment Container Traffic contracted by 0.8%. Details are summarised in Table 14.

Table 14: Total Container Traffic – FY21/22 v/s FY22/23 (TEUs)

	FY21/22	FY22/23	Difference	% Change
Captive	233,971	247,637	13,666	5.8%
Transhipment	174,174	172,757	-1,417	-0.8%
Total	**408,145**	**420,394**	**12,249**	**3.0%**

6.1 Total Captive Container Traffic

Total Captive Container Traffic expanded from 233,971 TEUs in FY21/22 to 247,637TEUs, representing a growth of 5.8% in FY22/23. Table 15 shows the comparative monthly captive container traffic for the financial period under review.

Table 15: Total Captive Container Traffic FY21/22 v/s FY22/23 (TEUs)

Month	FY21/22	FY22/23	Difference	% Change
Jul	16,410	20,630	4,220	25.7%
Aug	17,776	21,545	3,769	21.2%
Sep	24,442	22,617	-1,825	-7.5%
Oct	20,836	23,364	2,528	12.1%
Nov	20,066	20,060	- 6	0.0%
Dec	20,179	25,338	5,159	25.6%
Jan	21,937	15,317	- 6,620	-30.2%
Feb	11,277	17,401	6,124	54.3%
Mar	20,594	19,648	-946	-4.6%
Apr	18,994	19,928	934	4.9%
May	20,571	23,072	2,501	12.2%
Jun	20,889	18,717	- 2,172	-10.4%
Total	**233,971**	**247,637**	**13,666**	**5.8%**

6.1.1 Captive Laden Import Container Traffic

Laden import container traffic witnessed a growth of 5.0% equivalent to 5,403 TEUs with a total of 113,300 TEUs in FY22/23 as compared to 107,897 TEUs in FY21/22. This expansion is largely attributed to the economic recovery as well as high import content of the tourism sector which has picked up rapidly and the easing of freight rates as shown in Table 16.

Table 16:Captive Laden Import Container Traffic FY21/22 v/s FY22/23 (TEUs)

Month	FY21/22	FY22/23	Difference	% Change
Jul	8,141	9,121	980	12.0%
Aug	7,409	10,963	3,554	48.0%
Sep	10,561	9,619	- 942	-8.9%
Oct	10,101	11,156	1,055	10.4%
Nov	11,038	10,106	- 932	-8.4%
Dec	9,964	10,726	762	7.6%
Jan	8,851	7,443	-1,408	-15.9%
Feb	5,546	8,149	2,603	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%
Total	**107,897**	**113,300**	**5,403**	**5.0%**

6.1.2 Captive Laden Export Container Traffic

Captive laden export container traffic remained almost at par with 52,037 TEUs in FY21/22 and 51,968 TEUs in FY22/23 as external demand is expected to remain subdued in 2023.

According to World Economic Outlook Update, July 2023, growth in the Euro area is projected to fall from 3.5% in 2022 to 0.9% in 2023. Moreover, albeit the buoyant exports of sugar and seafood products, the subpar performance is driven mainly by the contraction in the textile related segment according to external trade statistics, 1st quarter 2023. Table 17 shows that containerised exports exhibited a mixed performance during the FY21/23.

Table 17: Captive Laden Export Container Traffic FY21/22 v/s FY22/23 (TEUs)

Month	FY21/22	FY22/23	Difference	% Change
Jul	3,641	4284	643	17.7%
Aug	3,765	4286	521	13.8%
Sep	5,082	5295	213	4.2%
Oct	4,596	5442	846	18.4%
Nov	5,251	4305	-946	-18.0%
Dec	4,355	4900	545	12.5%
Jan	3,993	3843	-150	-3.8%
Feb	2,638	3789	1,151	43.6%
Mar	5,338	4461	-877	-16.4%
Apr	4,786	3648	-1,138	-23.8%
May	4,304	4371	67	1.6%
Jun	4,288	3344	-944	-22.0%
Total	**52,037**	**51968**	**-69**	**-0.1%**

6.1.3 Captive Empty Import Container Traffic

Import of empty container traffic increased from 8,553 TEUs in FY21/22 to 10,441 TEUs in FY22/23, representing a growth of 22.1% for the year under review. Details are outlined in Table 18.

Table 18: Captive Empty Import Container Traffic FY21/22 v/s FY22/23 (TEUs)

Month	FY21/22	FY22/23	Difference	% Change
Jul	531	906	375	70.6%
Aug	648	815	167	25.8%
Sep	1,048	736	-312	-29.8%
Oct	820	895	75	9.1%
Nov	830	1,843	1013	122.0%
Dec	672	908	236	35.1%
Jan	563	848	285	50.6%
Feb	300	539	239	79.7%
Mar	801	1,069	268	33.5%
Apr	666	716	50	7.5%
May	834	527	-307	-36.8%
Jun	840	639	-201	-23.9%
Total	**8,553**	**10,441**	**1,888**	**22.1%**

6.1.4 Captive Empty Export Container Traffic

Captive empty export container traffic expanded to the tune of 9.8% with 71,928 TEUs in FY22/23 as compared to 65,484 TEUs in FY21/22.

Table 19 provides a comparative monthly summary of the captive empty export container traffic for the year FY21/22 to FY22/23.

Table 19:Captive Empty Export Container Traffic FY21/22 v/s FY22/23 (TEUs)

Month	FY21/22	FY22/23	Difference	% Change
Jul	4,097	6319	2,222	54.2%
Aug	5,954	5481	-473	-7.9%
Sep	7,751	6967	-784	-10.1%
Oct	5,319	5871	552	10.4%
Nov	2,947	3806	859	29.1%
Dec	5,188	8804	3,616	69.7%
Jan	8,530	3183	-5,347	-62.7%
Feb	2,793	4924	2,131	76.3%
Mar	5,015	4847	-168	-3.3%
Apr	5,254	6941	1,687	32.1%
May	6,168	8359	2,191	35.5%
Jun	6,468	6426	-42	-0.6%
Total	**65,484**	**71928**	**6,444**	**9.8%**

6.2 Total Transhipment Inwards Container Traffic

It is to be noted that long lasting pandemic-induced supply chain disruptions was particularly detrimental to transhipment activities in 2022 as the two major shipping lines, MSC and Maersk, downsized their vessels sizes and calls during the first quarter of 2022. Total Transhipment Container Traffic stood at 172,757 TEUs in FY22/23 compared to 174,174 TEUs in FY21/22, witnessing a reduction of 0.8%, representing some 1,417 TEUs. Comparative monthly transhipment container traffic is summarised in Table 20.

Table 20: Total Transhipment Inwards Container Traffic - FY21/22 v/s FY22/23 (TEUs)

Month	FY21/22	FY22/23	Difference	% Change
Jul	14,478	9,346	-5,132	-35.4%
Aug	14,118	12,225	-1,893	-13.4%
Sep	16,747	14,176	-2,571	-15.4%
Oct	18,651	13,930	-4,721	-25.3%
Nov	15,945	15,886	-59	-0.4%
Dec	15,783	15,994	211	1.3%
Jan	21,127	13,291	-7,836	-37.1%
Feb	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%
Total	**174,174**	**172,757**	**-1,417**	**-0.8%**

It is to be noted that the easing of supply chain bottleneck by the end of 2022 and redeployment of bigger vessels at Port Louis has contributed to the improvement in transhipment volumes since February 2023.

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 decrease of 2.1%, equivalent to 2,694 TEUs during the financial year under review.

Table 21: Transhipment Inwards Laden Container Traffic - FY21/22 v/s FY22/23 (TEUs)

Month	FY21/22	FY22/23	Difference	% Change
Jul	11,414	7,900	-3,514	-30.8%
Aug	10,023	8,968	-1,055	-10.5%
Sep	11,970	10,110	-1,860	-15.5%
Oct	12,307	10,688	-1,619	-13.2%
Nov	12,012	10,827	-1,185	-9.9%
Dec	11,064	11,371	307	2.8%
Jan	14,118	9,889	-4,229	-30.0%
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%
Total	**128,061**	**125,367**	**-2,694**	**-2.1%**

6.2.2 Transhipment Inwards Empty Container Traffic (TEUs)

For the financial year under review, empty transhipment container has progressed from 46,113 TEUs in FY21/22 to 47,390 TEUs in FY22/23, representing an increase of 2.8%, equivalent to 1,277 TEUs as detailed in Table 22.

Table 22: Transhipment Inwards Empty Container Traffic - FY21/22 v/s FY22/23 (TEUs)

Month	FY21/22	FY22/23	Difference	% Change
Jul	3,064	1,446	-1,618	-52.8%
Aug	4,095	3,257	-838	-20.5%
Sep	4,777	4,066	-711	-14.9%
Oct	6,344	3,242	-3,102	-48.9%
Nov	3,933	5,059	1,126	28.6%
Dec	4,719	4,623	-96	-2.0%
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%
Total	**46,113**	**47,390**	**1,277**	**2.8%**

6.3 Total Container Throughput for the port

Total Container Throughout, comprising Total Container Traffic + Total Transhipment Container Outwards + paid restows for the period FY22/23 stood at 602,941 TEUs versus 603,792 TEUs in FY21/22, representing a minor drop of 0.1%, equivalent to 851 TEUS as shown in Table 23:

Table 23: Total Container Throughput - FY21/22 v/s FY22/23 (TEUs)

	FY21/22	FY22/23	Difference	% Change
Captive	233,971	247,637	13,666	5.8%
Transhipment Inwards	174,174	172,757	-1,417	-0.8%
Transhipment outwards	179,404	170,620	-8,784	-4.9%
Paid restows	16,243	11,927	-4,316	-26.6%
Total	**603,792**	**602,941**	**-851**	**-0.1%**

7. PERFORMANCE INDICATORS AT MCT

7.1 Container Vessel Calls at MCT

Total container vessel calls at Port Louis in FY 22/23 were 496. Out of which, some 491 container vessels were serviced at the MCT as compared to 432 in FY21/22 as depicted in Table 24.

Table 24: Vessels Calls at MCT – FY21/22 v/s FY22/23

Month	FY21/22	FY22/23	Difference	% Change
Jul	31	32	1	3.2%
Aug	37	42	5	13.5%
Sep	35	32	-3	-8.6%
Oct	43	39	-4	-9.3%
Nov	39	37	-2	-5.1%
Dec	38	49	11	28.9%
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%
Total	**432**	**491**	**59**	**13.7%**

The breakdown of the 491 vessel calls at MCT during the FY22/23 is categorised as per new Addendum of the MCT Concession Contract 2019 and shown in the following table.

Vessel Category	No. of calls in FY21/22	No. of calls in FY22/23	Difference	% Change
Small Feeder up to 1,000 TEUs	72	72	0	0.0%
Feeder 1,001 to 2,000 TEUs	93	76	-17	-18.3%
Feedermax 2,001 to 3,000 TEUs	66	94	28	42.4%
Panamax 3,001 to 5,001 TEUs	63	82	19	30.2%
Post Panamax 5,101 to 10,000 TEUs	133	156	23	17.3%
Neo Panamax 10,001 to 14,500 TEUs	4	8	4	100.0%
Ultra Large Container Ship 14,501+ TEUs	1	3	2	200.0%
Total	**432**	**491**	**59**	**13.7%**

The above depicts the normalisation of global container logistics sector and as a result bigger container ships are being redeployed at Port Louis Harbour.

7.2 Container Throughput at MCT

The number of containers handled was 410,188 units in FY22/23 compared to 410,096 units in FY21/22, representing a marginal increase of 0.02% equivalent to 92 units as depicted in Table 25.

On the other hand, the Container Throughput in terms of number of TEUs registered a contraction to the tune of 0.47% equivalent to 2758 TEUs, from 589,580 TEUS in FY21/22 to 586,822 TEUS in FY22/23 for the financial year under review.

Conversely, the number of moves including all restows, hatch covers, gear boxes, recorded in FY22/23 was 423,101 compared to 422,831 in FY21/22, representing an increase of 0.06%, equivalent to 270 moves.

Table 25: No of Containers/TEUs/moves - FY21/22 v/s FY22/23

Month	Containers			TEUs			Moves		
	FY21/22	FY22/23	Difference	FY21/22	FY22/23	Difference	FY21/22	FY22/23	Difference
Jul	32,416	26,627	- 5,789	45,462	38,466	-6,996	33,289	27,621	5,668
Aug	31,806	28,805	- 3,001	46,075	41,172	- 4,903	32,794	29,809	2,985
Sep	41,594	34,765	- 6,829	60,039	50,316	-9,723	42,715	36,011	6,704
Oct	40,500	37,642	- 2,858	56,708	54,315	-2,393	41,707	38,882	2,825
Nov	36,876	35,252	- 1,624	51,363	50,571	-792	38,070	36,442	1,628
Dec	37,155	38,736	1,581	53,597	55,735	2,138	38,281	40,132	1,851
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
Total	**410,096**	**410,188**	**92**	**589,580**	**586,822**	**-2,758**	**422,831**	**423,101**	**270**
% Change			**0.02%**			**-0.47%**			**0.06%**

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 – FY21/22 v/s FY22/23

	FY21/22	**FY22/23**
Average Moves Per Gross Crane Hour	21.3	22.0
Average Moves per Ship's Working Hour	37.5	37.4
Average Pre-berthing/ Sailing Delay (hrs)	14.7	8.1
Berth Occupancy (%)	65.1	72.4

- The average number of moves per gross crane has slightly improved with 21.3 in FY21/22 and 22.0 in FY22/23.
- On the other hand, the average moves per ship's working hour remained at par with 37.4 for the current financial year as compared to 37.5 recorded in FY21/22 as the maximum no. of cranes deployed in operations has remained to 5.
- Similarly, the average pre-berthing delay per vessel has improved from 14.7 hours in FY21/22 to 8.1 hours posted in FY 22/23.
- Commendably, the berth occupancy has expanded from 65.1% in FY21/22 to 72.4% in FY 22/23 as more container vessels were operated at MCT as indicated at Table 24.

7.4 Crane Productivity

Table 27 provides the comparative crane productivity for the FY21/22 versus FY22/23.

Table 27: Average Moves per Gross Crane Hours - FY21/22 v/s FY22/23

Month	FY21/22	FY22/23
Jul	21.9	19.7 (Lowest)
Aug	22.1	22.4
Sep	22.6 (Highest)	21.5
Oct	22.1	21.1
Nov	22.1	22.3
Dec	19.8 (Lowest)	21.5
Jan	20.7	22.9
Feb	20.9	22.3
Mar	20.7	21.6
Apr	21.1	22.6
May	20.3	23.1
Jun	21.1	23.3 (Highest)
Average	**21.3**	**22.0**

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

7.5 Ship Productivity

Comparative monthly ship productivity for FY21/22 versus FY22/23 is detailed in Table 28.

Table 28: Average Moves per Ship's Working Hours - FY21/22 v/s FY22/23

Month	FY21/22	FY22/23
Jul	34.9	30.2 (Lowest)
Aug	41.0	37.4
Sep	46.2 (Highest)	36.4
Oct	40.8	38.1
Nov	40.6	44.4 (Highest)
Dec	33.2 (lowest)	33.4
Jan	35.9	37.1
Feb	32.4	38.3
Mar	35.6	36.1
Apr	36.5	38.9
May	34.6	41.0
Jun	38.3	39.3
Average	**37.5**	**37.4**

The average ship productivity remains practically the same with 37.4 moves per ship working hour in FY22/23 against 37.5 moves registered for the FY21/22.

7.6 Pre-berthing Delay

The pre-berthing delay is the interval between arrival and berthing of a vessel, i.e., waiting time in port beginning 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.

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 like bunker by barge or hull cleaning prior berthing. Table 29 depicts the average pre-berthing delay at MCT, which has gone down from 14.7 hrs in FY21/22 to 8.1 hrs in FY22/23.

Table 29: Average Pre-Berthing Delay - FY21/22 v/s FY22/23 (hrs)

Month	FY21/22	FY22/23
Jul	31.0	3.9
Aug	16.1	8.7
Sep	14.3	3.9
Oct	12.2	1.8
Nov	8.0	1.7
Dec	22.0	8.0
Jan	21.1	18.9
Feb	25.9	15.9
Mar	13.0	15.1
Apr	6.8	6.3
May	1.9	7.1
Jun	11.1	5.0
Average	**14.7**	**8.1**

7.7 Berth Occupancy @ MCT

The berth occupancy for MCT has increased from 53% in FY21/22 to 58% for the period under review, driven by more container vessels working at MCT as detailed previously at 7.1. Same is depicted in Table 30 for FY22/23 compared to FY21/22.

Table 30: Berth Occupancy at MCT - FY21/22 v/s FY22/23 (%)

	FY21/22		FY22/23	
Month	**Working**	**Total Occupied**	**Working**	**Total Occupied**
Jul	48	66	54	69
Aug	41	51	44	56
Sep	55	64	65	85
Oct	54	61	62	74
Nov	59	73	53	64
Dec	69	82	68	86
Jan	67	81	47	67
Feb	36	42	58	69
Mar	56	67	70	87
Apr	42	54	61	74
May	62	75	61	76
Jun	48	59	51	61
Total	**53**	**64**	**58**	**72**

It should be noted that container vessels very often carry out ancillary activities like bunkering, removal of garbage, loading of spare parts, generators & provisions, sludge collection, waiting for tug/ pilotage service, etc prior start or after completion of handling operations, which is reflected in the increasing Total berth occupancy from 64% in FY21/22 to 72% in FY22/23.

In few instances, handling operations start with some delays as the final stowage plan/ documentation has to be submitted by agents especially for ships coming from Reunion Island with a short sailing time.

8. VESSEL CALLS

Some 2,713 vessel calls were registered during the year FY22/23 as compared to 2,578 calls in FY21/22, i.e., an increase of 135 calls. Table 31 provides a summary of Total Vessel Traffic for the financial year under review.

Table 31: Vessel calls for the year - FY21/22 v/s FY22/23

Category	FY21/22	FY22/23	Difference	% Change
Containerized Vessels	434	496	62	14.3%
Livestock Carrier	14	19	5	35.7%
Pure Car Carriers	32	41	9	28.1%
Unitized & Break Bulk Carriers	0	0	0	0
General Cargo Vessels	3	1	-2	-66.7%
Inter-Island	39	53	14	35.9%
Dry Bulk carriers	51	53	2	3.9%
Tankers	80	72	-8	-10.0%
Fishing Vessels	695	758	63	9.1%
Cruise Vessels	2	22	20	1000.0%
Others	1,228	1198	-30	-2.4%
Total	**2,578**	**2713**	**135**	5.2%

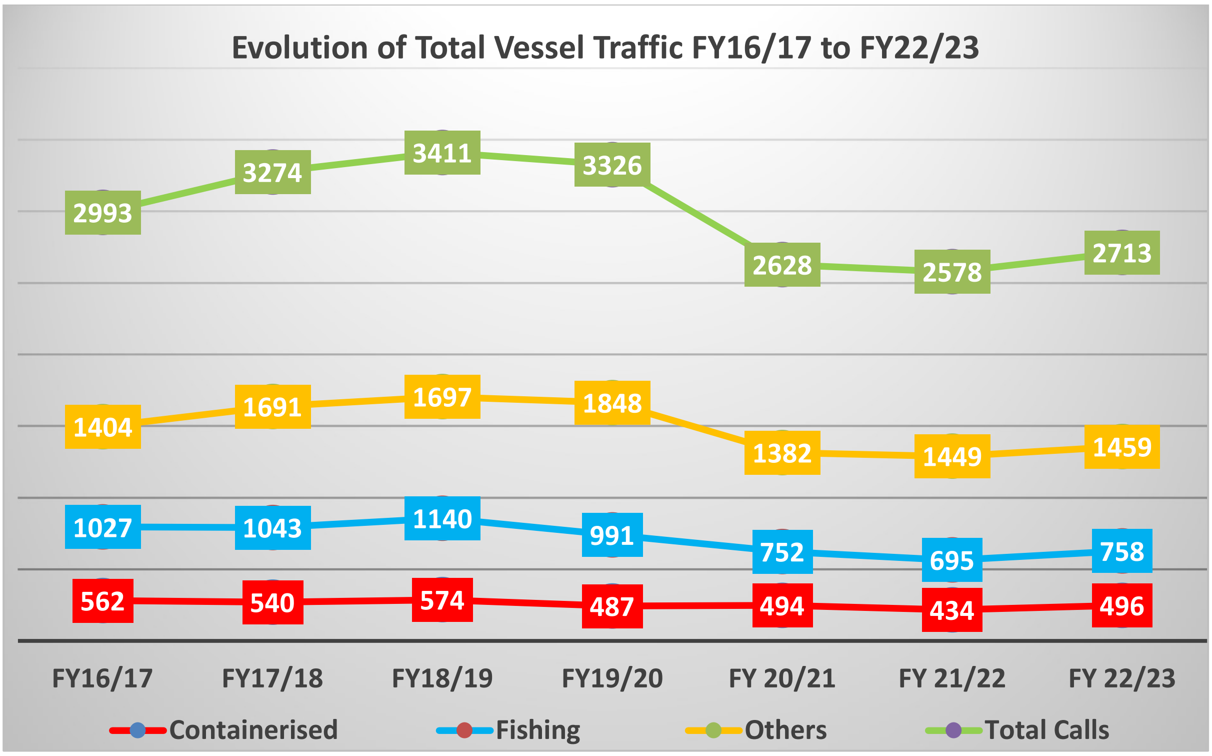
- Containerised vessel calls registered a growth of 14.3 %, with 496 calls in FY22/23 as opposed to 434 calls in FY21/22.

- On the other hand, the no. of calls by tankers was 72 in FY22/23 as opposed to 80 recorded during the FY21/22, registering a negative growth of 10.0%. This performance is mainly driven by the Black Oil segment as the significant contraction in bunker volumes, partly offsetting the increase in imports of heavy fuel oil by CEB.

- Whereas the no. of calls made by Dry Bulk carriers was 53 in FY22/23 as compared to 51 in FY21/22, registering a growth of 3.9%

- Fishing vessel calls expanded by 9.1%, with 758 calls in FY22/23 as compared to 695 calls in FY21/22.

- In the same vein for inter-island trade, total number of calls increase from 39 in FY21/22 to 53 in FY22/23.



8.1 Cruise Tourism

Cruise Tourism is expected to rebound faster than international tourism arrivals in 2023 according to the report 'State of the Cruise Industry 2023' by Cruise Lines International Association (CLIA).

Likewise on the domestic front, we expect further progress in this segment with the resumption of the home-porting activities by Aida Cruises at Port Louis and the inauguration of the Port Louis Cruise Terminal from the next season 2023/24

Cruise Vessel Calls

This segment was badly hit in FY21/22 with only 2 cruise vessel calls. For the FY 22/23, 22 Round the World (RTW) cruise ships called at Port Louis following the lifting of domestic restrictions as from November 2021 as well as recovery of tourism in 2022.

Cruise Passengers Arrivals

Similarly, the cruise passengers on arrival jumped from 99 for the FY 21/22 to 21,031 for the FY 22/23 as provided in the Table 32.

Table 32: Total Cruise Traffic FY21/22 v/s 22/23

	Total No. of Cruise Passengers		**Total No. of Cruise Calls**	
	FY21/22	FY22/23	FY21/22	FY22/23
TOTAL (RTW)	99	21,031	2	22

8.2 Calls at Outer Harbour

The number of vessels calling at Outer Harbour declined from 1,228 vessel calls for the year FY21/22 to 1,198 calls during the current financial year, as depicted in Table 33.

Vessels call at Outer Harbour for activities such as bunkering purposes, crew change, repairs, inspections of cargo or vessel hull conditions, provision of fresh water supply and ship-chandling, amongst others.

Table 33: Total Calls Outer Harbour - FY21/22 v/s FY22/23

	FY21/22	FY22/23	Difference	% Change
Bunkering Only	792	711	-81	-10.2%
Crew Change	171	215	44	25.7%
Ship Stores	84	56	-28	-33.3%
Repairs or Inspection	99	116	17	17.2%
Others	82	100	18	22.0%
Total	**1,228**	**1,198**	**-30**	**-2.4%**

From Table 33, a contraction 2.4% has been noted for the number of vessels calling at Outer harbour for the financial year under review as the reductions recorded in the following segment; namely bunkering only (-10.2%), Ship Stores (-33.3%) has more than offset the expansions recorded in crew change (+25.7%), Repair & Inspection (+17.2%) and others including registration, etc (22.0%).

9. PERFORMANCE AT MULTI PURPOSE TERMINAL

9.1 Key Performance Indicators

Table 34: Key Performance Indicators at MPT - FY21/22 v/s FY22/23

	FY21/22	FY22/23
No. of Vessel Calls	3	5
No. of Containers	1,540	1,687
Avg. Moves /Gross Gang hr	5.9	5.0

- During FY22/23, 5 container vessel calls were registered at the MPT and some 1,687 TEUs were handled in comparison with 3 container vessels and 1,540 TEUs respectively.

- In FY22/23, the average gang productivity noted a decline and reached at 5.0 moves/gross gang hour as opposed to 5.9 in FY21/22.

9.2 Inter-Island Trade

Vessels plying between the dependencies of Mauritius (Rodrigues and Agalega) made 59 calls and handled some 14,360 TEUs in FY22/23 as depicted in the table 35.

Table 35: Intra-Island Trade traffic of Mauritius– FY21/22 v/s FY 22/23

	FY21/22	FY22/23
Breakdown of the total no. of voyages		
Black Rhino[1]	32	29
Mauritius Trochetia[2]	19	26
Msm Douro[3]	0	4
Total No. of Voyages	51	59
Breakdown of the total no. of containers		
Black Rhino	10,835	8875
Mauritius Trochetia	2,486	4,304
Msm Douro	0	1181
Total No. of Containers	13,321	14,360

9.3 Berth Occupancy @ MPT

Comparative Berth Occupancy for FY21/22 versus FY22/23 of the various berths at Terminals I and II are depicted in Table 36.

Table 36: Berth Occupancy at MPT - FY21/22 v/s FY22/23 (%)

Berth		FY21/22		FY22/23	
		Working	Total Occupied	Working	Total Occupied
Quay No. 1	Terminal ll	21.5	53.8	19.9	54.2
Quay No. 2	Terminal ll	26.2	57.0	23.7	70.3
Quay No. 3	Terminal ll	21.6	57.3	20.6	67.6
Quay No. 4	Terminal ll	19.3	69.8	19.8	66.3
Quay A	Terminal I	22.5	69.7	21.2	84.7
Quay D	Terminal I	8.2	65.0	9.6	68.3
Quay E	Terminal I	5.6	59.2	3.7	71.6
Bulk Sugar Terminal		0	0	6.0	9.9
Trou Fanfaron Fishing Quay 1		6.8	99.4	8.4	99.4
Trou Fanfaron Fishing Quay 2		3.3	99.4	5.6	98.9
Cruise Jetty		0	0	0	12.0
Oil Jetty		17.7	33.9	21.1	33.0
FDM		34.3	96.3	34.7	98.3
MFD		16.9	79.1	17.1	88.2

Apart from Quay 4 and Oil Jetty, all remaining berths have noted an increase in total berth occupancy rate for the financial year under review. It is to be noted that berth occupancy of vessels working at Terminals 1 and 2 remained at par around 17% and is still low (below 25%).

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[1] Black Rhino effected 11 calls in FY 21/22 & 4 Calls in FY 22/23 at MCT, thus accounted as containerised vessel.

[2] Mauritius Trochetia effected 1 call for both Financial Year at MCT, thus accounted as containerised vessel.

[3] MSM Douro effected 1 call at MCT, thus accounted as containerised vessel.

It is to be noted that no cruise ship was berthed at the cruise jetty during the FY21/22 owing to ongoing works in connection with the construction of the cruise terminal building. The berth occupancy at Trou Fanfaron is close to 100% on account of high non-working time thereat.

10. CONTAINER TRAFFIC BY SHIPPING LINES

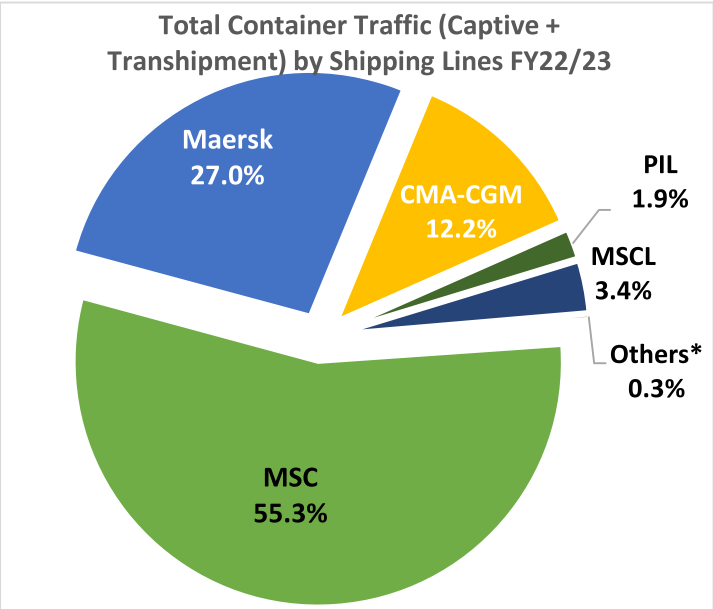
10.1 Total Container Traffic

Table 37: Total Container Traffic by Shipping lines – TEUs

Shipping Line	FY21/22	% Share	FY22/23	% Share	Difference	% Change in Volume
MSC	218,292	53.5	232,538	55.3	14,246	6.5%
Maersk	103,674	25.4	113,567	27.0	9,893	9.5%
CMA-CGM	71,598	17.5	51,081	12.2	-20,517	-28.7%
PIL	0	0	8,031	1.9	8,031	-
Mauritius Shipping Corporation Ltd. (MSCL)	13,334	3.3	14,088	3.4	754	5.7%
Others *	1,247	0.3	1,089	0.3	-158	-12.7
Total	**408,145**	**100**	**420,394**	**100**	**12,249**	**3.0%**

* Others include: Hapag Lloyd, UAFL and DAL

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



MSC's share gone up from 53.5% to 55.3% and its total container traffic volume increase by 6.5% from 218,292 TEUs in FY21/22 to 232,538 TEUs in FY22/23.

Maersk's share in FY22/23 stood at 27.0%, higher than its previous financial year, i.e., 25.4%. Likewise, a growth of 9.5% has been noted in their volume for the financial year under review.

On the other hand, CMA-CGM's share in total container traffic stood at 12.2% in FY22/23 as opposed to 17.5% in FY21/22. Similarly, its volume noted a decline of 28.7%.

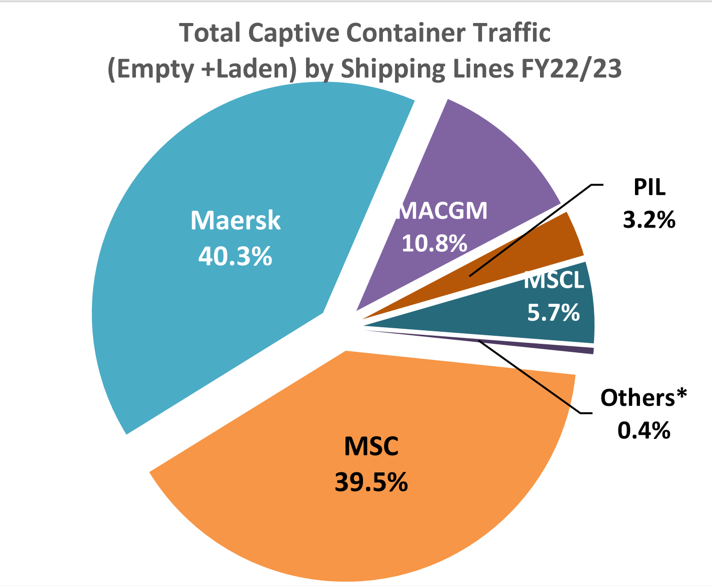
- PIL resumed calling at Port Louis as from July 2022.

10.2. Total Captive Container Traffic

Table 38: Total Captive Container Traffic by Shipping lines – TEUs

Shipping Line	FY21/22	FY22/23	Difference	% Change
MSC	95,272	97,861	2,589	2.7%
Maersk	87,392	99,834	12,442	14.2%
CMA-CGM	36,726	26,735	-9,991	-27.2%
PIL	0	8,030	8,030	-
MSCL	13,334	14,088	754	5.7%
Others *	1,247	1,089	-158	-12.7
Total	**233,971**	**247,637**	**13,666**	**5.8%**

* Others include: Hapag Lloyd, UAFL and DAL



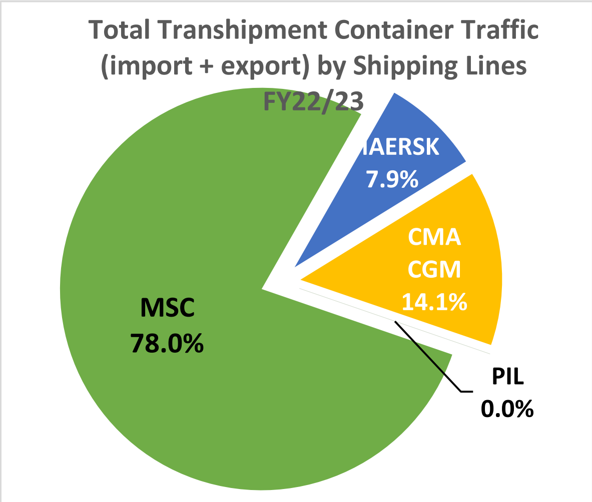
Total captive container traffic witnessed an increase of 5.8% with TEUs 247,637 in FY22/23 as opposed to 233,971 TEUs in FY21/22.

10.3 Total Transhipment Traffic

Total transhipment container traffic dropped slightly by 0.8 % for the financial year under review.

Table 39: Total Transhipment Traffic by Shipping Lines - TEUs

Shipping Line	FY21/22	FY22/23	Difference	% Change
MSC	123,020	134,677	11,657	9.5%
Maersk	16,282	13,733	-2,549	-15.7%
CMA-CGM	34,872	24,346	-10,526	-30.2%
PIL	0	1	1	-
Total	**174,174**	**172,757**	**-1,417**	**-0.8%**



It is worth noting that:

MSC had an increase of 9.5% whereas

Maersk and CMA-CGM have noted a reduction of 15.7% and 30.2% respectively.

11. MARKET SHARE BY MAJOR SHIPPING LINES

In FY22/23, the local market was shared as follows:

- Total Container Traffic: MSC held 55.3% of the market share followed by Maersk with a share of 27.0% and CMA-CGM with a share of 12.2% in FY22/23

- Total Captive Container Traffic: Maersk's had a market share of 40.3% compared to MSC's share of 39.5% and CMA-CGM's share of 10.8% in FY22/23

- Total Transhipment Container Traffic: MSC, which holds the lion share, stood at 78% in FY22/23 followed by CMA-CGM's and Maersk with market share of 14.1% and 7.9%, respectively.

Table 40: Comparative Traffic Share in Container Traffic - FY21/22 v/s FY22/23

	Share FY21/22	Share FY22/23
MSC		
Total Container Traffic	53.5%	55.3%
Total Captive Container Traffic	40.7%	39.5%
Total Transhipment Container Traffic	70.6%	78.0%
Maersk		
Total Container Traffic	25.4%	27.0%
Total Captive Container Traffic	37.4%	40.3%
Total Transhipment Container Traffic	9.3%	7.9%
CMA-CGM		
Total Container Traffic	17.5%	12.2%
Total Captive Container Traffic	15.7%	10.8%
Total Transhipment Container Traffic	20.0%	14.1%

12 TRANSHIPMENT ACTIVITIES BY SHIPPING LINES

12.1 Mediterranean Shipping Company Ltd (MSC)

Transhipment Inwards-TEUs	FY21/22	FY22/23	Difference	% Change
Laden	94,757	98,011	3,254	3.4%
Empty	28,263	36,666	8,403	29.7%
Total	**123,020**	**134,677**	**11,657**	**9.5%**

Some 134, 677 TEUs were transhipped by MSC during the current financial year as compared to 123,020 TEUs in FY21/22, i.e., a growth of around 9.5%.

12.2 Maersk Line

Transhipment Inwards-TEUs	FY21/22	FY22/23	Difference	% Change
Laden	9,689	11,537	1,848	19.1%
Empty	6,593	2,196	-4,397	-66.7%
Total	**16,282**	**13,733**	**-2,549**	**-15.7%**

The number of TEUs transhipped by Maersk Shipping Line fell to 13,733 TEUs in FY22/23 as opposed to 16,282 TEUs in FY21/22 i.e., a negative growth of 15.7%

12.3 CMA-CGM

Transhipment Inwards-TEUs	FY21/22	FY22/23	Difference	% Change
Laden	23,615	15,818	-7,797	-33.0%
Empty	11,257	8,528	-2,729	-24.2%
Total	**34,872**	**24,346**	**-10,526**	**-30.2%**

The number of TEUs transhipped by CMA-CGM decreased from 34,872 TEUs in FY21/22 to 24,346 TEUs in FY22/23.

13. DOWNTIME AT PORT

During the year under review, handling operations were disrupted at the port for about 16.6 days in FY22/23 (cyclone Freddy) as compared to 22.2 days in FY21/22 (cyclones Batsirai and Emnati) owing to adverse weather conditions.

14. SHIPPING SERVICES FY22/23

<table>
<tr><th>CONTAINER LINERS</th><th>WEEKLY SERVICE</th><th>MAIN PORTS OF CALL</th></tr>
<tr><td rowspan="8">1. Mediterranean Shipping Company (Mauritius) Ltd.
MSC House
Old Quay D Road
Port Louis
Tel : (230) 202 6800
Fax : (230) 217 4747</td><td>1. Europe to Australia Service
(VSA with CMA-CGM NEMO Service)</td><td>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</td></tr>
<tr><td>2. INGWE Southbound Service</td><td>Qingdao, Shanghai, Ningbo, Shekou, Singapore, Mundra, Port Louis, Durban</td></tr>
<tr><td>3. INGWE Northbound Service</td><td>Durban, Coega, Port Louis, Colombo, Singapore, Qingdao</td></tr>
<tr><td>4. Ilanga Express Service</td><td>Mundra, Hazira, Colombo, Port Louis, Durban, Jebel Ali</td></tr>
<tr><td>5. Zambezi Express Service</td><td>Port Louis, Beira, Maputo, Port Louis</td></tr>
<tr><td>6. Indian Ocean Islands 2 (Fortnightly)</td><td>Port Louis, Longoni, Majunga, Diego Suarez, Port Louis</td></tr>
<tr><td>7. Indian Ocean Islands 3</td><td>Port Louis, Réunion, Port Louis</td></tr>
<tr><td>8. Indian Ocean Islands 4 (Fortnightly)</td><td>Port Louis, Nacala, Moroni, Port Louis</td></tr>
<tr><td rowspan="3">2. Maersk (Mauritius) Ltd.
MFD Building
Freeport Zone 5
Mer Rouge
Port Louis
Tel. : (230) 206 2200
Fax : (230) 206 2210</td><td>1. Safari Service
(Slot chartering by CMA-CGM Shaka Service)</td><td>Tanjung Pelepas, Port Louis, Durban, Tanjung Pelepas, Hong Kong, Shanghai, Ningbo.</td></tr>
<tr><td>2. Indian Ocean Islands
(Slot chartering by DAL/ UAFL)</td><td>Salalah, Réunion, Port Louis, Toamasina, Port Victoria.</td></tr>
<tr><td>3. M-Express
(VSA with CMA-CGM Mozex Service)</td><td>Réunion, Maputo, Beira, Port Louis, Singapore, Tanjung Pelepas</td></tr>
<tr><td rowspan="3">3. CMA-CGM (Mauritius) Ltd
Block 3, Zone 5
MFD Building
Mer Rouge
Port Louis,
Tel: (230) 203 4350
Fax: (230) 217 8251/ 2080245</td><td>1. IOI Feeder 2</td><td>Pointe des Galets, Tamatave, Port Louis, Reunion.</td></tr>
<tr><td>2. IOI Feeder 1/5</td><td>Longoni, Majunga, Nosy Be, Diego Suarez, Pointe Des Galets Port Louis, Pointe Des Galets</td></tr>
<tr><td>3.IOI Feeder 3 (Fortnightly)</td><td>Tulear, Ehola, Port Louis, Pointe Des Galets.</td></tr>
</table>

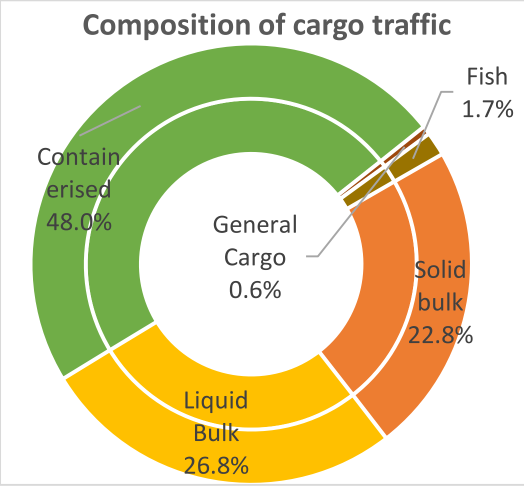
CONTAINER LINERS	WEEKLY SERVICE	MAIN PORTS OF CALL
4. PIL **5. UAFL/ DAL** <u>Agent:</u> Scott Shipping International Ltd Ground Floor, IKS House Marine Road Port Louis Tel: (230) 216 3042 Fax: (230) 216 0045	MZS Service Indian Ocean Islands (Slot chartering with Maersk)	Singapore, , **Port Louis,** 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 – PCC 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 FY22/23

A. Total Cargo



Total Cargo Traffic (Dry Bulk, Liquid Bulk, Containerised Cargo, and General Cargo) handled in the Port decreased from 7,665,603 tonnes in FY21/22 to reach 7,534,454 tonnes in FY22/23.

The composition of total cargo traffic is depicted in the Figure.

Cargo (bagged + maize+ coal + fertilizer +soya bean meal + sugar + break bulk + inter-island + fish + containerised) handled by CHCL amounted to 4,491,705 tonnes, equivalent to 59.62% of Total Cargo Traffic.

	FY21/22	FY22/23	Difference	% Change
Total Solid Bulk	1,818,899	1,720,537	-98,362	-5.4%
Total Liquid Bulk	2,123,206	2,018,556	-104,650	-4.9%
Total Containerised	3,574,271	3,617,640	43,369	1.2%
Total General Cargo	48,667	46,582	-2,085	-4.3%
Total Fish Traffic	100,560	131,139	30,579	30.4%
Grand Total	**7,665,603**	**7,534,454**	**-131,149**	**-1.7**

B. Total Dry Bulk Cargo

Total Dry Bulk cargo, which registered a reduction of 5.4%, equivalent to 98,362 tonnes, declined from 1,818,899 tonnes in FY21/22 to tonnes 1,720,537 in FY22/23.

Total Dry Bulk Cargo FY21/22 v/s FY22/23 (tonnes)

	FY21/22	FY22/23	Difference	% Change
Imports	1,818,899	1,720,537	-98,362	-5.4%
Exports	-	-		
Total	**1,818,899**	**1,720,537**	**-98,362**	**-5.4%**

C. Total Liquid Bulk Cargo

Total Liquid Bulk contracted from 2,123,206 tonnes in FY21/22 to 2,018,556 tonnes in FY22/23, witnessing a decline of 4.9%, equivalent to 104,650 tonnes.

Total Liquid Bulk Cargo FY21/22 v/s FY22/23 (tonnes)

	FY21/22	FY22/23	Difference	% Change
Imports	1,524,364	1,589,186	64,822	4.3%
Exports	598,842	429,370	-169,472	-28.3%
Total	2,123,206	2,018,556	-104,650	-4.9%

D. Containerised Cargo

Total Containerised Cargo soared from 3,574,271 tonnes in FY21/22 to 3,6,17,640 tonnes in FY22/23, representing an expansion of 1.2% as summarised below.

Containerised Cargo Traffic FY21/22 v/s FY22/23 (tonnes)

	FY21/22	FY22/23	Difference	% Change
Imports	1,347,375	1,416,253	68,878	5.1%
Exports	650,465	658,120	7,655	1.2%
Transhipment (inwards)	1,576,431	1,543,267	-33,164	-2.1%
Total	**3,574,271**	**3,617,640**	**43,369**	**1.2%**

E. General Cargo Traffic

General Cargo, comprising all vehicles tonnage, inter-island, bagged cargo, and unitised break bulk but excluding fish traffic, contracted by 4.3% (equivalent to 2,085 tonnes) with 46,582 tonnes in FY22/23 as compared to 48,667 tonnes in FY21/22.

General Cargo Traffic FY21/22 v/s FY22/23 (tonnes)

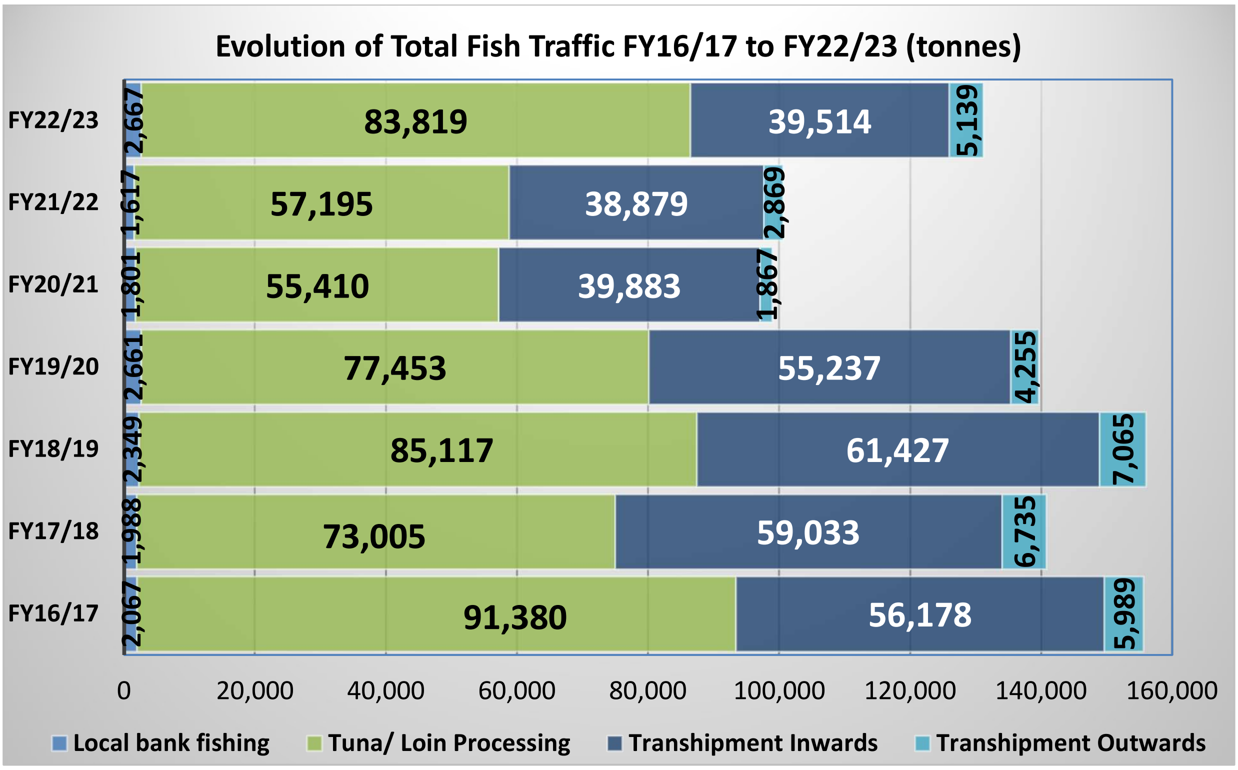
	FY21/22	FY22/23	Difference	% Change
Imports	43,085	41,552	-1,533	-3.6%
Exports	5,582	5,030	-552	-9.9%
Total	**48,667**	**46,582**	**-2,085**	**-4.3%**

F. Fish Traffic

Total Fish Traffic increased by 30.4% from 100,560 tonnes in FY21/22 to 131,139 tonnes in FY22/23.

Total Fish Traffic FY21/22 v/s FY22/23 (tonnes)

	FY21/22	FY22/23	Difference	% Change
Princes Tuna	57,195	83,819	26,624	46.5
Local Market	1,617	2,667	1,050	64.9
Transhipment Inwards	36,010	34,375	-1,635	-4.5
Direct Transhipment Inwards (ship to ship)	2,869	5,139	2,270	79.1
Direct Transhipment Outwards (ship to ship)	2,869	5,139	2,270	79.1
Grand Total	**100,560**	**131,139**	**30,579**	**30.4%**



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