Port Trade Performance
FY22/23 versus FY23/24

20.09.2024

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Port Trade Performance FY23/24

1. KEY FIGURES AT A GLANCE

Total Trade Volume	**8.6**	**Million tonnes**	**(+13.8 %)**
• Containerised Cargo	4.0	Million tonnes	(+11.9%)
• Dry Bulk Cargo	1.9	Million tonnes	(+8.7%)
• Liquid Bulk Cargo	2.5	Million tonnes	(+23.9%)
• Fish Traffic	118,146	tonnes	(-9.9%)
Total Container Traffic	**469,585**	**TEUs**	**(+11.7%)**
• Captive Container	271,003	TEUs	(+9.5%)
• Transhipment Container Inwards	198,582	TEUs	(+14.9%)
• Transhipment Container Outwards	198,406	TEUs	(+16.3%)
Total Container Throughput (incl. paid restows)	**680,538**	**TEUs**	**(+12.9%)**
Total Vessel Traffic	3517	calls	(+29.6%)
• Containerised Vessels	476	calls	(-4.0%)
• Fishing Vessels	803	calls	(+5.9%)
• Cruise Traffic	47	calls	(+113.6%)
Total Bunker Traffic	**734,856**	**tonnes**	**(+72.3%)**
• Pipeline	55,462	tonnes	(-1.5%)
• Barges	679,394	tonnes	(+83.5%)

2. INTRODUCTION

The IMF in its April 2024 World Economic Outlook, the world economy to continue growing at 3.2% during 2024, same pace as in 2023. There will be by a modest slowdown in emerging market and developing economies from 4.3% in 2023 to 4.2 % in 2024. Global inflation is forecast to decline steadily, from 6.8% in 2023 to 5.9% in 2024 and 4.5 % in 2025.

On the other hand, according to Review of Maritime Transport (2023), global shipping continues to confront multiple challenges, including heightened trade policy, decarbonisation, changes in globalization patterns as well as geopolitical tension. The Red Sea crisis that is already constraining vessel crossing in the Suez Canal and the war in Ukraine, affecting activity in the Black Sea, are thus causing greater upheaval in global supply chains.

This has led to an increase in freight rates as it has been reported that diverting vessels around the Cape of Good Hope has led to additional costs, as the extended transit times are notable with an additional 14 days for Northern Europe, 18 days for Southern Europe and a 30% rise in fuel consumption compared to the route through the Suez Canal.

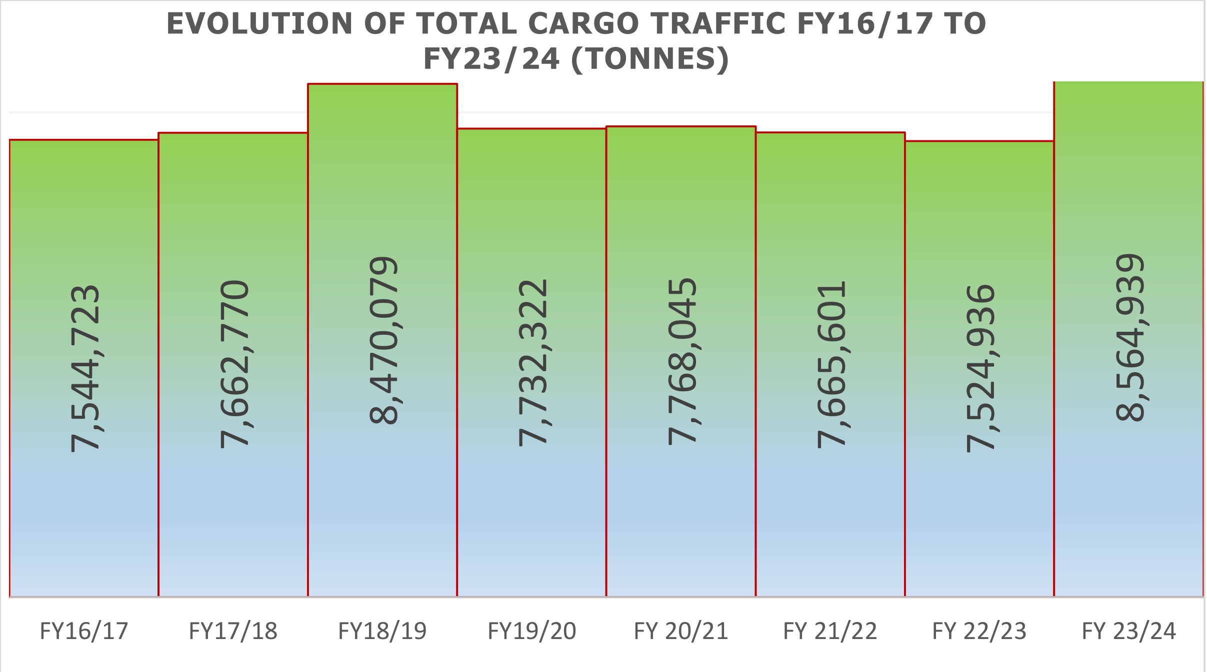
On the domestic front, the Mauritian economy has rebounded strongly from the impact of the pandemic and grew by 7.1% in 2023 and is expected to expand by 4.9% in 2024, according to latest national accounts estimates. It is to be noted that GDP exceeded the pre pandemic level output in 2023.

The Red Sea crisis has been a mixed blessing as the bunkering activities have noted an upsurge but the disruption in the container logistics sector has resulted to an increase in freight rates from China/ India to Mauritius. In fact, for a 20ft container, freight rate which was around $1,700 prior to Red Sea crisis has increased to around $5,200 in June 2024. However, on a positive note, freight rates between Europe and Mauritius have remained practically the same.

Port Louis harbour witnessed a new record level in the total cargo tonnage handled during the financial year 2023/2024 (FY23/24) with an impressive figure of 8,564,939 tonnes, breaking the previous record 8,470,079 tonnes of FY18/19, as opposed to 7,524,936 tonnes registered in FY22/23, representing a growth of 13.8%, equivalent to 1,040,003 tonnes, driven mainly by robust economic recovery as well as strong performance in GDP-independent cargo namely bunkering and container transhipment activities.

The total container traffic has witnessed an expansion of 11.7% and reached 469,585 TEUs in FY23/24 as compared to 420,357 TEUs in FY22/23. For the period under review, both captive and transhipment container traffic expanded by 9.5% and 14.9% respectively.

The port witnessed a growth 29.6% in the total vessels calls, from 2,713 in FY22/23 to 3,517 in FY23/24, mainly driven by the significant expansion in vessel taking bunker and local fishing vessels calls.



3. TOTAL CARGO TRAFFIC

Total Cargo tonnage handled in the port stood at a new record volume of 8,564,939 tonnes in FY23/24 as compared to 7,524,936 tonnes in FY22/23, representing a double-digit growth of 13.8%, equivalent to 1,040,003 tonnes, as summarised in Table 1.

Table 1: -Total Cargo Traffic – FY22/23 v/s FY23/24 (tonnes)

	FY22/23	FY23/24	Difference	% Change
Total Imports	4,893,527	5,352,240	458,713	9.4
Total Exports	1,088,142	1,375,345	287,203	26.4
Total Containerised Transhipment Inwards	1,543,267	1,837,354	294,087	19.1
Total	**7,524,936**	**8,564,939**	**1,040,003**	**13.8**

Total Imports

Total Imports Traffic grew by 9.4% from 4,893,527 tonnes in FY22/23 to reach 5,352,240 tonnes in FY23/24. Expansions recorded in solid bulk (+8.7), liquid bulk (+11.2%), containerised cargo (+10.8%) imports more than offset the contractions recorded in fish (-7.3) and general cargo (-32.7%) imports.

Total Exports

Total exports stood at 1,375,345 tonnes in FY23/24 as compared 1,088,142 to tonnes in FY22/23, representing a growth of 26.4%. It should be noted that expansions recorded in liquid bulk (+71%) and fish (+73.1%) exports more than offset the contractions noted in containerised cargo (-2.1%) and general cargo (-15.9%) exports.

Total Containerised Transhipment Inwards

Total Containerised Transhipment Inwards traffic increased from 1,543,267 tonnes in FY22/23 to 1,837,354 tonnes in FY23/24, representing a growth of 19.1% equivalent to 294,087 tonnes.

4. TOTAL IMPORTS

Total Imports expanded by 9.4% with **5,352,240** tonnes in FY23/24 as compared to **4,893,528** tonnes in FY22/23. Table 2 illustrates the breakdown of Total Imports.

Table 2: Breakdown of Total Imports FY22/23 v/s FY23/24 (tonnes)

Imports	FY22/23	FY23/24	Difference	% Change
Solid Bulk	1,720,537	1,870,198	149,661	8.7
Liquid Bulk	1,589,186	1,766,629	177,443	11.2
Containerised	1,416,253	1,563,940	147,687	10.4
Fish	126,000	116,766	-9,234	-7.3
General cargo	41,552	34,707	-6,845	-16.5
Total	**4,893,528**	**5,352,240**	**458,712**	**9.4**

4.1 Solid (Dry) Bulk Imports

Solid bulk imports have witnessed an expansion of 8.7%, equivalent to 149,661 tonnes, from 1,720,537 tonnes in FY22/23 to 1,870,198 tonnes in FY23/24 as detailed in Table 3.

Table 3: Solid Bulk Imports – FY22/23 v/s FY23/24 (tonnes)

	FY22/23	FY23/24	Difference	% Change
Coal	515,092	775,545	260,453	50.6
Cement	745,138	699,105	-46,033	-6.2
Wheat	153,053	124,868	-28,185	-18.4
Sugar	126,000	84,000	-42,000	-33.3
Maize	125,000	121,625	-3,375	-2.7
Soya Bean Meal	56,254	65,055	8,801	15.6
Total	**1,720,537**	**1,870,198**	**149,661**	**8.7**

- Coal imports showed an increase of 50.6 with 775,545 tonnes in FY23/24 as compared to 515,092 tonnes in FY22/23, reflecting the resumption of power generation activities by Terragen Ltd since April 2023.

- Bulk Cement imports illustrate a decrease of 6.2% with 699,105 tonnes in FY23/24 as compared to 745,138 tonnes in FY22/23 resulting in a contraction of 46,033 tonnes.

- For the year under review, imports of wheat decreased by 18.4 % from 153,053 tonnes in FY22/23 to 124,868 tonnes in FY23/24, reflecting mainly to the non-award of the full contract of supply of flour for the domestic market in 2023 by State Trading Corporation to Les Moulins De La Concorde.

- Bulk sugar import contracted to 84,000 tonnes in FY23/24 compared to 126,000 tonnes in FY22/23 showing a decrease of 42,000 tonnes. According to Statistics Mauritius estimates (June 2024), the level of production is expected to grow by 5.1% based on a revised estimate of local sugar production (250,000 tonnes)

- Maize and soya bean meal are mainly used in the production of animal feed for chicken. Overall, the animal feed (maize and soya bean) has noted a growth of 2.9%, reflecting mainly the buoyant activities in the hospitality sector. However, the breakdown reveals that soya bean meal imports which expanded by 15.6% more than offset the contraction of 2.7% recorded in the maize segment.

4.2 Liquid Bulk Imports

Total imports of liquid bulk increased by 11.2%, representing 177,443 tonnes, i.e., from 1,589,186 tonnes in FY22/23 to 1,766,629 tonnes in FY23/24 as summarised in table 4.

Table 4: Liquid Bulk Imports - FY22/23 v/s FY23/24 (tonnes)

	FY22/23	FY23/24	Difference	% Change
White oil	763,943	754,681	-9,262	-1.2
Black oil	713,939	900,678	186,739	26.2
LPG	82,528	93,368	10,840	13.1
Edible oil	22,500	15,304	-7,196	-32.0
Bitumen	6,276	2,598	-3,678	-58.6
Total	**1,589,186**	**1,766,629**	**177,443**	**11.2**

- Imports of White oil decreased from 763,943 tonnes in FY22/23 to 754,681 tonnes in FY23/24, representing a slight decrease of 1.2.

Table 4.1: White Oil Imports

TYPE	FY22/23	FY23/24	Difference	% Change
JET A1	249,255	271,735	22,480	9.0
GAS OIL 10ppm	223,884	186,816	-37,068	-16.6
GAS OIL	45,661	73,371	27,710	60.7
GAS OIL 0.95	23,564	19,683	-3,881	-16.5
MOTOR GASOLINE	175,198	157,093	-18,105	-10.3
MARINE GAS OIL 0.1%	5,592	30,573	24,981	446.7
DISTILLED MARINE FUEL	40,789	15,410	-25,379	-62.2
TOTAL	**763,943**	**754,681**	**-9,262**	**-1.2**

- Imports of Black oil expanded from 713,939 tonnes in FY22/23 to 900,678 tonnes in FY23/24, representing a growth of 26.2%.

  For the period under review, the strong expansion in bunkering activities more than offset the reduction in the importation of heavy fuel oil by CEB following the resumption of power generation by Terragen Ltd since April 2023.

Table 4.2: Black Oil Imports

TYPE	FY22/23	FY23/24	Difference	% Change
FUEL OIL 180 cstcc	43749	33662	-10087	-23.1
FUEL OIL 180 cstsr	185411	165187	-20224	-10.9
FUEL OIL 380 cstsr	171450	173330	1881	1.1
Ship to Ship	20636	101125	80489	390.0
Very Low Sulphur Fuel Oil	60038	109576	49538	82.5
High Sulphur Fuel Oil	35156	15648	-19508	-55.5
Low Sulphur Fuel Oil	4974	140368	135394	2722.0
Residual Marine Fuel rmg (180)	102814	19749	-83065	-80.8
Residual Marine Fuel rmg (380)	89711	142033	52322	58.3
Total	713939	900678	186739	26.2

- Imports of LPG increased by 13.1% from 82,528 tonnes in FY22/23 to 93,368 tonnes in FY23/24 as the demand for LPG remained buoyant since the four segments namely manufacturing, transport, commercial and redistributive trade moved in line with broad based economic recovery.

- For the year under review, imports of Edible Oil decreased by 32.0 % from 22,500 tonnes to 15,304, as edible oil is also imported in containers.

- Bitumen imports has dropped down by 58.6 % from 6,276 tonnes in FY22/23 to 2,598 tonnes in FY23/24.

4.3 Containerised Cargo Imports

Total containerised imports noted an increase of 10.4%. The breakdown of this traffic in Table 5 reveals that captive containerised cargo imports show an expansion of 10.8% whereas Inter-Island witnessed a contraction of 17.5%.

Table 5: Containerised Cargo Imports – FY22/23 v/s FY23/24 (tonnes)

	FY22/23	FY23/24	Difference	% Change
Captive	1,397,678	1,548,624	150,946	10.8
Inter-Island	18,575	15,316	-3,259	-17.5
Total	**1,416,253**	**1,563,940**	**147,687**	**10.4**

4.4 General Cargo Imports

Total General Cargo Imports witnessed a decrease of 16.5%. The breakdown of this traffic shows that both unitized break bulk and Inter-Island general cargo have declined by 15.8% and 32.7% respectively as shown in Table 6.

Table 6: General Cargo Imports – FY22/23 v/s FY23/24 (tonnes)

	FY22/23	FY23/24	Difference	% Change
Unitized Break Bulk	39,866	33,573	-6,293	-15.8
Inter-Island	1,686	1,134	-552	-32.7
Total	**41,552**	**34,707**	**-6,845**	**-16.5**

4.5 Fish Traffic Imports

Total fish imports posted a decrease of 7.3% with 116,766 tonnes in FY23/24 as compared to 126,000 tonnes in FY22/23.

On the other hand, it is worth noting that the total number of fishing vessels calling at Port Louis have increased from 732 calls in FY22/23 to 793 calls recorded in FY23/24, representing an increase of 8.3%, driven mainly by the significant increase in the local market and transhipment segments.

Table 7: Fish Traffic Imports - FY22/23 v/s FY23/24 (tonnes)

	Volume (tonnes)				Vessel Calls			
	FY22/23	FY23/24	Difference	% Change	FY22/23	FY23/24	Difference	% Change
Tuna/ Loin Processing	83,819	66,753	-17,066	-20.4	27	24	-3	-11.1
Bank fishing	2,667	3,293	626	23.5	270	332	62	23.0
Transhipment Inwards	34,375	45,340	10,965	31.9	291	414	123	42.3
Direct Transhipment Inwards	5,139	1,380	-3,759	-73.1	144	23	-121	-84.0
Total	**126,000**	**116,766**	**-9,234**	**-7.3**	**732**	**793**	**61**	**8.3**

- Imports of Tuna as raw materials by Princess Tuna and Thon des Mascareignes decreased by 17,066 tonnes from 83,819 tonnes in FY22/23 to 66,753 tonnes in FY23/24. This decline is mainly linked to 1) increased in the fish minimum stock level by the main operator 2) seasonal decline in fish stocks

- Conversely, catch in our oceanic banks, mainly meant for the local market, has shown a significant rise by 23.5. %, from 2,667 tonnes in FY22/23 to 3,293 tonnes in FY23/24, showing an 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 significantly increased by 31.9% with 45,340 tonnes in FY23/24 against 34,375 tonnes recorded in FY22/23, driven by higher number fishing vessels calling for transhipment activities at Port Louis Harbour.

- On the other hand, direct ship to ship transhipment has gone down from 5,139 tonnes in FY22/23 to 1,380 tonnes recorded during the current financial year, representing a decrease of 73.1%, reflecting a decrease in the number of vessels undertaking direct transhipment activities at Port Louis.

5. TOTAL EXPORTS

Total exports expanded by 26.4% and stood at 1,375,345 tonnes in FY23/24 as compared to 1,088,141 tonnes in FY22/23.

Table 8: Breakdown of Total Bulk Exports - FY22/23 v/s FY23/24 (tonnes)

Exports	FY22/23	FY23/24	Difference	% Change
Liquid Bulk	429,370	734,856	305,486	71.1
Containerised	648,602	634,877	-13,725	-2.1
General cargo	5,030	4,232	-798	-15.9
Fish	5,139	1,380	-3,759	73.1
Total	**1,088,141**	**1,375,345**	**287,204**	**26.4**

5.1 Liquid Bulk Exports

Exports of Liquid Bulk cargo registered a growth of 71.1 from 429,370 tonnes in FY22/23 to 734,856 tonnes in FY23/24, equivalent to 305,485 tonnes as detailed in Table 9.

Table 9: Breakdown of Liquid Bulk Exports - FY22/23 v/s FY23/24 (tonnes)

	FY22/23	FY23/24	Difference	% Change
Total Bunker	426,504	734,856	308,352	72.3
White Oil	2,866	0	-2,866	-100
Grand Total	**429,370**	**734,856**	**305,486**	**71.1**

Total bunker exports, which account for the most of bulk of total bulk liquid exports, witnessed an expansion of 72.3%, equivalent to an increase of some 308,352 tonnes. The breakdown hereunder reveals refuelling activities at Port Louis has recovered rapidly during FY23/24.

5.1.1 Bunkering Activities

Total volume of bunker increase by 72.3% from 426,504 tonnes in FY22/23 to 734,856 tonnes in FY23/24 as outlined in the figure below and Table 10.

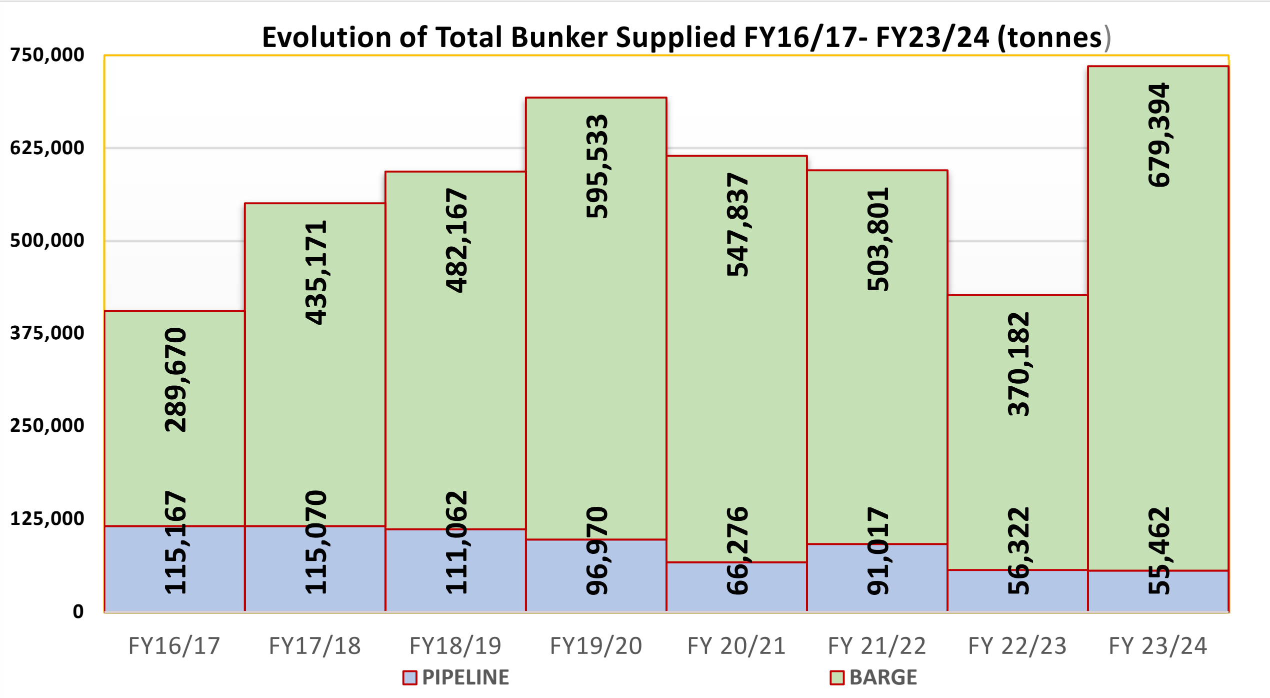


Table 10: Total Bunker Exports – FY22/23 v/s FY23/24

	Volume in Tonnes				Vessel Calls			
	FY22/23	FY23/24	Difference	% Change	FY22/23	FY23/24	Difference	% Change
Bunker by pipeline	56,322	55,462	-860	-1.5	894	942	48	5.4
Bunker by barge	370,182	679,394	309,212	83.5	918	1,506	588	64.0
Total	**426,504**	**734,856**	**308,352**	**72.3**	**1,812**	**2,448**	**636**	**35.1**

Bunker Volume

Table 10 shows that volume of bunker by pipeline has noted a decrease of 1.5% and stood at 55,462 tonnes in FY23/24 against 56,322 tonnes in FY22/23, mainly due to decline in average parcel load.

The exports of Bunker by barge, which accounts for the bulk of total bunkers, has noted a significant raise from 370,182 tonnes in FY22/23 to 679,394 tonnes in FY23/24, representing a growth of 83.5%. This exceptional growth, which is well outside normal fluctuations, is mainly attributable to the increase demand for bunkers by vessels re-routing their voyages via Cape of Good Hope in the wake of the Red Sea Crisis since November 2023.

Bunker Calls

The total number of vessels refuelling at Port Louis has increased from 1,812 calls in FY22/23 to 2,448 calls in FY23/24, posting a surplus of 35.1%.

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 expanded by 5.4% and 64.0%, respectively, for the financial period under review.

5.2 Containerised Cargo Exports

Total containerised cargo exports declined from 648,602 tonnes in FY22/23 to 634,877 tonnes in FY23/24, representing a contraction of 2.1%. The breakdown of this traffic reveals that captive witnessed a decline of 3.5 % whilst inter-island containerised exports noted an expansion 6.9%.

Table 11: Containerised Exports – FY22/23 v/s FY23/24 (tonnes)

	FY22/23	FY23/24	Difference	% Change
Captive	562,674	542,982	-19,692	-3.5
Inter-Island	85,928	91,895	5,967	6.9
Total	**648,602**	**634,877**	**-13,725**	**-2.1**

5.3 General Cargo Exports

Total General Cargo Exports witnessed a contraction of 15.9%. The breakdown of this traffic shows that both unitized Break Bulk and Inter- Island segment have shrunk by 32.0% and 10.0%, respectively.

Table 12: General Cargo Exports – FY22/23 v/s FY23/24 (tonnes)

	FY22/23	FY23/24	Difference	% Change
Unitized Break Bulk	1357	926	-431	-32.0
Inter-Island	3673	3,306	-367	-10.0
Total	**5030**	**4,232**	**-798**	**-15.9**

5.4 Fish Traffic Exports

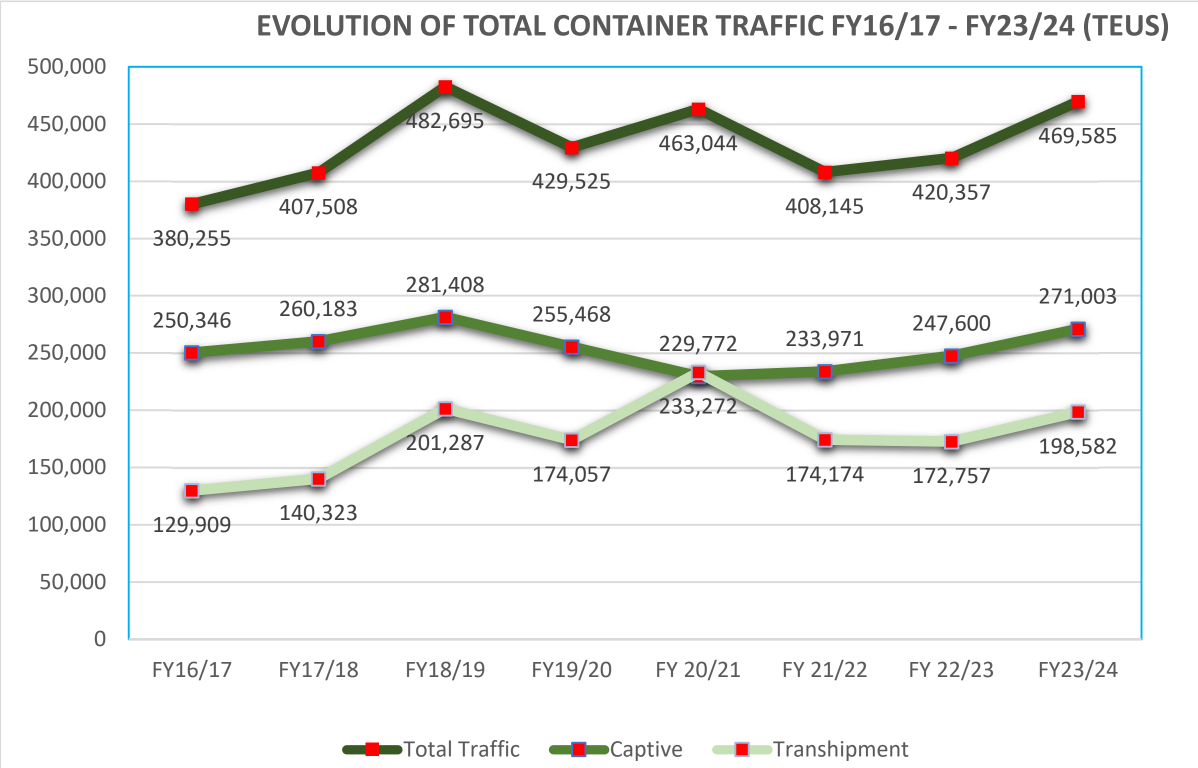
For the year FY23/24, direct transhipment outwards of fish stood at 1,380 tonnes as opposed to 5,139 tonnes in FY22/23, representing a decline of 73.0% owing to the reduction in the number of fishing vessels involved in direct transhipment activities for the financial year under review.

Table 13: Fish Exports – FY22/23 v/s FY23/24 (tonnes)

	Volume in Tonnes				No of vessel Calls			
	FY22/23	**FY23/24**	**Difference**	**% Change**	**FY22/23**	**FY23/24**	**Difference**	**% Change**
Direct Transhipment outwards (ship to ship)	5,139	1,380	-3,759	-73.0	26	10	-16	-61.5

6. TOTAL CONTAINER TRAFFIC

Total Container Traffic (excluding paid restows) witnessed a growth of 11.7%, equivalent to 49,228 TEUs from 420,357 TEUs in FY22/23 to 469,585 TEUs in FY23/24.



It is worth noting that Captive Container Traffic noted an evolution of 9.5% whilst Transhipment Container Traffic also expanded by 14.9%. Details are summarised in Table 14.

Table 14: Total Container Traffic – FY22/23 v/s FY23/24 (TEUs)

	FY22/23	**FY23/24**	**Difference**	**% Change**
Captive	247,600	271,003	23,403	9.5
Transhipment	172,757	198,582	25,825	14.9
Total	**420,357**	**469,585**	**49,228**	**11.7**

6.1 Total Captive Container Traffic

Total Captive Container Traffic expanded from 247,600 TEUs in FY22/23 to 271,003 TEUs, representing a growth of 9.5% in FY23/24. Table 15 shows the comparative monthly captive container traffic for the financial period under review.

Table 15: Total Captive Container Traffic FY22/23 v/s FY23/24 (TEUs)

Month	FY22/23	FY23/24	Difference	% Change
Jul	20,630	21,431	801	3.9
Aug	21,545	21,180	-365	-1.7
Sep	22,617	18,851	-3,766	-16.7
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
Jan	15,317	13,013	-2,304	-15.0
Feb	17,401	24,857	7,456	42.8
Mar	19,648	31,145	11,497	58.5
Apr	19,891	22,464	2573	12.9
May	23,072	25,281	2209	9.6
Jun	18,717	25,588	6,871	36.7
Total	**247,600**	**271,003**	**23,403**	**9.5**

6.1.1 Captive Laden Import Container Traffic

Laden import container traffic witnessed a growth of 10.4% equivalent to 11,783 TEUs with a total of 125,083 TEUs in FY23/24 as compared to 113,300 TEUs in FY22/23. This expansion is largely attributed to the economic recovery in 2023 and 2024, underpinned by key industries faring notably well such as tourism and construction, which have high import content as shown in Table 16.

Table 16: Captive Laden Import Container Traffic FY22/23 v/s FY23/24 (TEUs)

Month	FY22/23	FY23/24	Difference	% Change
Jul	9,121	10,295	1,174	12.9
Aug	10,963	10,238	-725	-6.6
Sep	9,619	10,128	509	5.3
Oct	11,156	10,314	-842	-7.5
Nov	10,106	10,341	235	2.3
Dec	10,726	12,775	2,049	19.1
Jan	7,443	5,944	-1,499	-20.1
Feb	8,149	11,378	3,229	40.0
Mar	9,271	12,502	3,231	34.8
Apr	8,623	9,721	1,098	12.7
May	9,815	9,630	-185	-1.9
Jun	8,308	11,817	3,509	42.2
Total	**113,300**	**125,083**	**11,783**	**10.4**

6.1.2 Captive Laden Export Container Traffic

Captive laden export container traffic declined with 51,888 TEUs in FY22/23 and 50,790 TEUs in FY23/24 representing a decrease of 1,098 TEUs.

Table 17: Captive Laden Export Container Traffic FY22/23 v/s FY23/24 (TEUs)

Month	FY22/23	FY23/24	Difference	% Change
Jul	4,284	4,303	19	0.4
Aug	4,286	5,427	1,141	26.6
Sep	5,295	4,008	-1,287	-24.3
Oct	5,442	4,934	-508	-9.3
Nov	4,305	3,582	-723	-16.8
Dec	4,900	4,676	-224	-4.6
Jan	3,843	1,930	-1,913	-49.8
Feb	3,789	4,332	543	14.3
Mar	4,461	5,184	723	16.2
Apr	3,568	3,970	402	11.3
May	4,371	3,877	-494	-11.3
Jun	3,344	4,567	1,223	36.6
Total	**51,888**	**50,790**	**-1098**	**-2.1**

The dismal performance is mainly driven by contraction in textile segment in 2023, according to National Accounts estimates (March 2024).

6.1.2 Captive Empty Import Container Traffic

Import of empty container traffic increased from 10,484 TEUs in FY22/23 to 12,054 TEUs in FY23/24, representing a growth of 15.0% for the year under review. Details are outlined in Table 18.

Table 18: Captive Empty Import Container Traffic FY22/23 v/s FY23/24 (TEUs)

Month	FY22/23	FY23/24	Difference	% Change
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
Jan	848	773	-75	-8.8
Feb	539	1,356	817	151.6
Mar	1,069	777	-292	-27.3
Apr	759	950	191	25.2
May	527	1,058	531	100.8
Jun	639	1,015	376	58.8
Total	**10,484**	**12,054**	**1,570**	**15.0**

6.1.4 Captive Empty Export Container Traffic

Captive empty export container traffic expanded to the tune of 15.5% with 83,076 TEUs in FY23/24 as compared to 71,928 TEUs in FY22/23.

Table 19 provides a comparative monthly summary of the captive empty export container traffic for the year FY22/23 to FY23/24.

Table 19: Captive Empty Export Container Traffic FY22/23 v/s FY23/24 (TEUs)

Month	FY22/23	FY23/24	Difference	% Change
Jul	6,319	6,017	-302	-4.8
Aug	5,481	4,551	-930	-17.0
Sep	6,967	3,596	-3,371	-48.4
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
Jan	3,183	4,366	1,183	37.2
Feb	4,924	7,791	2,867	58.2
Mar	4,847	12,682	7,835	161.6
Apr	6,941	7,823	882	12.7
May	8,359	10,716	2,357	28.2
Jun	6,426	8,189	1,763	27.4
Total	**71,928**	**83,076**	**11,148**	**15.5**

6.2 Total Transhipment Inwards Container Traffic

Total Transhipment Container Traffic stood at 198,582 TEUs in FY23/24 compared to 172,757 TEUs in FY22/23, recorded a double-digit growth of 14.9%, representing some 25,825 TEUs. Comparative monthly transhipment container traffic is summarised in Table 20. This remarkable performance is attributed to the expansion of transhipment traffic by CMA CGM and Maersk for the period under review. The latter has introduced a new service, namely Cape Town Service following port congestion in Durban.

Table 20: Total Transhipment-In Container Traffic - FY22/23 v/s FY23/24 (TEUs)

Month	FY22/23	FY23/24	Difference	% Change
Jul	9,346	17,524	8,178	87.5
Aug	12,225	21,897	9,672	79.1
Sep	14,176	19,871	5,695	40.2
Oct	13,930	19,996	6,066	43.6
Nov	15,886	16,997	1,111	7.0
Dec	15,994	18,341	2,347	14.7
Jan	13,291	7,108	-6,183	-46.5
Feb	14,834	14,727	-107	-0.7
Mar	18,086	15,622	-2,464	-13.6
Apr	12,435	12,405	-30	-0.2
May	15,698	16,710	1,012	6.4
Jun	16,856	17,384	528	3.1
Total	**172,757**	**198,582**	**25,825**	**14.9**

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 double-digit growth of 19.1%, equivalent to 23,890 TEUs during the financial year under review.

Table 21: Transhipment-In Laden Container Traffic FY22/23 v/s FY23/24 (TEUs)

Month	FY22/23	FY23/24	Difference	% Change
Jul	7,900	14,157	6257	79.2
Aug	8,968	15,105	6137	68.4
Sep	10,110	15,528	5418	53.6
Oct	10,688	16,366	5678	53.1
Nov	10,827	13,101	2274	21.0
Dec	11,371	14,307	2936	25.8
Jan	9,889	6,460	-3429	-34.7
Feb	10,687	11,314	627	5.9
Mar	12,772	11,980	-792	-6.2
Apr	8,162	8,629	467	5.7
May	12,430	9,819	-2611	-21.0
Jun	11,563	12,491	928	8.0
Total	**125,367**	**149,257**	**23,890**	**19.1**

6.2.2 Transhipment Inwards Empty Container Traffic (TEUs)

For the financial year under review, empty transhipment container has soared from 47,390 TEUs in FY22/23 to 49,325 TEUs in FY23/24, representing an increase of 4.1%, equivalent to 1,935 TEUs as detailed in Table 22.

Table 22: Transhipment-In Empty Container Traffic FY22/23 v/s FY23/24 (TEUs)

Month	FY22/23	FY23/24	Difference	% Change
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	3,896	-1,163	-23.0
Dec	4,623	4,034	-589	-12.7
Jan	3,402	648	-2,754	-81.0
Feb	4,147	3,413	-734	-17.7
Mar	5,314	3,642	-1,672	-31.5
Apr	4,273	3,776	-497	-11.6
May	3,268	6,891	3,623	110.9
Jun	5,293	4,893	-400	-7.6
Total	**47,390**	**49,325**	**1935**	**4.1**

6.3 Total Container Throughput for the port

Total Container Throughout, comprising Total Container Traffic + Total Transhipment Container Outwards + paid restows for the period FY23/24 stood at 680,538 TEUs versus 602,904 TEUs in FY22/23, representing a surplus of 12.9.%, equivalent to 77,634 TEUS as shown in Table 23:

Table 23: Total Container Throughput - FY22/23 v/s FY23/24 (TEUs)

	FY22/23	FY23/24	Difference	% Change
Captive	247,600	271,003	23,403	9.5
Transhipment Inwards	172,757	198,582	25,825	14.9
Transhipment outwards	170,620	198,406	27,786	16.3
Paid restows	11,927	12,547	620	5.2
Total	**602,904**	**680,538**	**77,634**	**12.9**

7. PERFORMANCE INDICATORS AT MAURITIUS CONTAINER TERMINAL

Mauritius Container Terminal (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.

7.1 Container Vessel Calls at MCT

Total container vessel calls at Port Louis in FY23/24 were 476. Out of which, some 472 container vessels were serviced at the MCT as compared to 491 in FY22/23 as depicted in Table 24.

Table 24: Vessels Calls at MCT – FY22/23 v/s FY23/24

Month	FY22/23	FY23/24	Difference	% Change
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	nil
Dec	49	39	-10	-20.4
Jan	35	17 (cyclones Belal, Candice)	-18	-51.4
Feb	40 (cyclone Freddy)	35 (cyclone Eleanor)	-5	-12.5
Mar	48	40	-8	16.7
Apr	43	39	-4	9.3
May	49	40	-9	18.4
Jun	45	40	-5	-11.1
Total	**491**	**472**	**-19**	**-3.9**

The breakdown of the 472 vessel calls at MCT during the FY23/24 is categorised as per new Addendum of the MCT Concession Contract 2019 and shown in the following table.

Vessel Category	No. of calls in FY22/23	No. of calls in FY23/24	Difference	% Change
Small Feeder up to 1,000 TEUs	72	43	-29	-40.3
Feeder 1,001 to 2,000 TEUs	76	69	-7	-9.2
Feedermax 2,001 to 3,000 TEUs	94	114	20	21.3
Panamax 3,001 to 5,001 TEUs	82	66	-16	-19.5
Post Panamax 5,101 to 10,000 TEUs	156	165	9	5.8
Neo Panamax 10,001 to 14,500 TEUs	8	14	6	75
Ultra Large Container Ship 14,501+ TEUs	3	1	-2	-66.7
Total	**491**	**472**	**-19**	**-3.9**

This dismal performance is mainly attributed to lower containerised vessel calls in January 2024, i.e. 17 against 35 recorded in January 2023 due to adverse weather conditions associated with Cyclones Belal and Candice.

7.2 Container Throughput at MCT

The number of containers handled was 454,744 units in FY23/24 compared to 410,188 units in FY22/23, representing a growth of 10.9% equivalent to 44,556 units as depicted in Table 25.

Similarly, the Container Throughput in terms of number of TEUs registered a growth to the tune of 13.2% equivalent to 77,710 TEUs, from 586,822 TEUS in FY22/23 to 664,532 TEUS in FY23/24 for the financial year under review.

Likewise, the number of moves including all restows, hatch covers, gear boxes, recorded in FY23/24 was 470,321 compared to 423,101 in FY22/23, representing a growth of 11.2%, equivalent to 47,220 moves.

Table 25: No of Containers/TEUs/moves - FY22/23 v/s FY23/24

Month	Containers			TEUs			Moves		
	FY22/23	FY23/24	Difference	FY22/23	FY23/24	Difference	FY22/23	FY23/24	Difference
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
Jan	28,531	18,871	-9,660	40,892	28,400	-12,492	29,627	19,529	-10,098
Feb	32,666	37,024	4,358	46,933	55,202	8,269	33,786	38,392	4,606
Mar	40,407	42,552	2,145	56,224	64,625	8,401	41,839	43,966	2,127
Apr	36,297	32,874	-3,423	49,113	49,239	126	35,787	34,095	-1,692
May	34,181	36,999	2,818	49,923	56,548	6,625	35,570	38,279	2,709
Jun	36,279	39,699	3,420	53,162	60,609	7,447	37,595	40,989	3,394
Total	**410,188**	**454,744**	**44,556**	**586,822**	**664,532**	**77,710**	**423,101**	**470,321**	**47,220**
% Change			**10.9**			**13.2**			**11.2**

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 – FY22/23 v/s FY23/24

	FY22/23	FY23/24
Average Moves Per Gross Crane Hour	22.0	22.8
Average Moves per Ship's Working Hour	37.4	39.4
Average moves per vessel	862	997
Berth Occupancy (%)	72.4	81.8

- The average number of moves per gross crane has improved with 22.0 in FY22/23 and 22.8 in FY23/24.
- On the other hand, the average moves per ship's working hour has also increased from 37.4 in FY 22/23 to 39.4 recorded in FY23/24, albeit, only 5 cranes are operational since February 2023.
- The berth occupancy has expanded from 72.4% in FY22/23 to 81.8% in FY23/24.

7.4 Crane Productivity

Table 27 provides the comparative crane productivity for the FY22/23 versus FY23/24.

Table 27: Average Moves per Gross Crane Hours - FY22/23 v/s FY23/24

Month	FY22/23	FY23/24
Jul	19.7 (Lowest)	23.4
Aug	22.4	22.3
Sep	21.5	23.5
Oct	21.1	21.9
Nov	22.3	22.2
Dec	21.5	21.0
Jan	22.9	22.3
Feb	22.3	21.0 (Lowest)
Mar	21.6	22.1
Apr	22.6	24.1
May	23.1	26.5 (Highest)
Jun	23.3 (Highest)	25.2
Average	**22.0**	**22.8**

Although the Average Gross Crane Productivity has improved, it 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 FY22/23 versus FY23/24 is detailed in Table 28.

Table 28: Average Moves per Ship's Working Hours - FY22/23 v/s FY23/24

Month	FY22/23	FY23/24
Jul	30.2 (Lowest)	42.3
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)
Jan	37.1	38.9
Feb	38.3	36.3
Mar	36.1	37.3
Apr	38.9	39.3
May	41.0	42.2
Jun	39.3	43.0 (Highest)
Average	**37.4**	**39.4**

The average ship productivity stood at 39.4 moves per ship working hour in FY23/24 against 37.4 moves registered for the FY22/23, driven mainly by the improvement in Gross Crane Productivity as crane intensity has remained unchanged.

7.6 Berth Occupancy @ MCT

The berth occupancy for MCT has increased from 58% in FY22/23 to 68% for the period under review, as detailed previously at 7.1. Same is depicted in Table 30 for FY23/24 compared to FY22/23.

Table 30: Berth Occupancy at MCT - FY22/23 v/s FY23/24 (%)

	FY22/23		FY23/24	
Month	**Working**	**Total Occupied**	**Working**	**Total Occupied**
Jul	54	69	48	57
Aug	44	56	76	89
Sep	65	85	77	88
Oct	62	74	78	89
Nov	53	64	70	84
Dec	68	86	75	93
Jan	47	67	44	59
Feb	58	69	76	87
Mar	70	87	78	93
Apr	61	74	61	75
May	61	76	65	78
Jun	51	61	75	86
Total	**58**	**72**	**68**	**81**

8. World Bank Container Port Performance Index (CPPI)

According to the World Bank Container Port Performance Index (CPPI) report 2023 Mauritius ranked 369 out of the 405 selected container ports. In 2022, it was ranked 327 out of 348 ports. Based on these figures, it would appear that Port Louis harbour continued to rank among the worst-performing in the world.

But it should be noted that this comparison is on purely statistical analysis of operational efficiency, known as the statistical approach. The Container Port Performance Index (CPPI) is based solely on the total time elapsed from when a ship first entered a port to when it unberth. In brief, the CPPI considers

i. the time container ships enter the port waters and waiting time at anchorage
ii. time taken by pilot and tug services to berth the vessels at quay,
iii. duration of cargo container handling operations
iv. unberthing and departure

At Port Louis, the Average Time spent in port per vessel, as defined by CPPI includes the time a vessel spends at berth (including container handling operations) and the average pre-berthing delays

Avg. Vessel Time in port = Avg. Time at Berth + Avg. Pre-berthing Delays

8.1 Vessel Time in Port

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 45.9 in FY23/24 compared to 39.0 hrs in FY22/23, owing to both increase in time spent at berth as well as pre-berthing delay as detailed below.

	FY22/23	**FY23/24**
Average Vessel Time in Port as per CPPI (Hrs)	39.0	45.9
Average vessel time at Berth (Hrs)	30.9	32.2
Average Pre-berthing Delay (hrs)	8.1	13.7

8.2 Average Time Spent at Berth

Whereas Average Time Spent at Berth by vessel for cargo handling operations was 32.2 hrs in FY23/24 in comparison to 30.9 hrs in FY22/23. The increase was mainly attributed in the increase in the average moves per vessel as shown in table 26 as the average gross crane productivity has increased marginally and stood at 22.8 moves per gross crane hour in FY23/24 compared to 22.0 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.

8.3 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.

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 most 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 31: Average Pre-Berthing Delay - FY22/23 v/s FY23/24 (hrs)

Month	FY22/23	FY23/24
Jul	3.9	4.8
Aug	8.7	13.4
Sep	3.9	7.6
Oct	1.8	18.3
Nov	1.7	10.4
Dec	8.0	44.9
Jan	18.9	2.95 (Cyclones Belal & Candice)
Feb	15.9 (Cyclone Freddy)	26.1(Cyclone Elanor)
Mar	15.1	14.0
Apr	6.3	5.9
May	7.1	7.0
Jun	5.0	5.9
Average	**8.1**	**13.7**

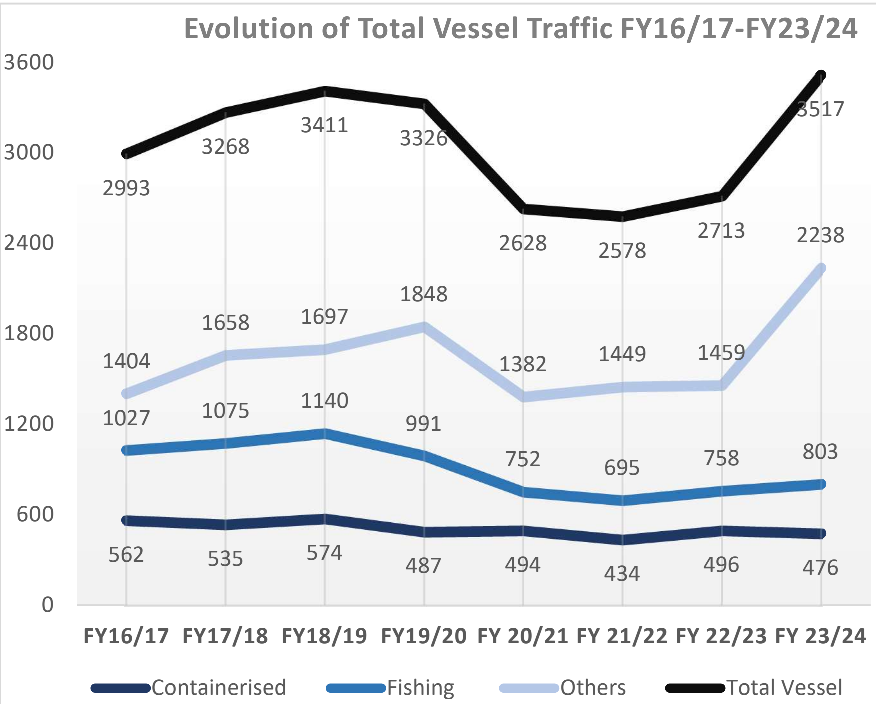
Table 30 depicts the average pre-berthing delay at MCT, which has increased from 8.1 hrs in FY22/23 to 13.7 hrs in FY23/24, especially during and following cyclonic season (Nov to May) and end-of-year peak period (Oct to Jan).

9. VESSEL CALLS

Some 3,517 vessel calls were registered during the year FY23/24 as compared to 2,713 calls in FY22/23, i.e., an increase of 804 calls. Table 31 provides the breakdown of Total Vessel Traffic for the financial year under review.

Table 31: Vessel calls for the year - FY22/23 v/s FY23/24

Category	FY22/23	FY23/24	Difference	% Change
Containerized Vessels	496	476	-20	-4.0
Livestock Carrier	19	14	-5	-26.3
Pure Car Carriers	41	36	-5	-12.2
Unitized & Break Bulk Carriers	0	0	0	0
General Cargo Vessels	1	1	0	0
Inter-Island	53	61	8	15.1
Dry Bulk carriers	53	55	2	3.8
Tankers	72	87	15	20.8
Fishing Vessels	758	803	45	5.9
Cruise Vessels	22	47	25	113.6
Others	1198	1937	739	61.7
Total	**2713**	**3517**	**804**	**29.6**



Containerised vessel calls declined by 4.0 %, with 476 calls in FY23/24 as opposed to 496 calls in FY22/23.

The no. of calls by tankers was 87 in FY23/24 as opposed to 72 recorded during the FY22/23, registering a robust growth of 20.8%.

No. of calls made by Dry Bulkers was 55 in FY23/24 as compared to 53 in FY22/23, registering a growth of 3.8%

Fishing vessel calls expanded by 5.9%, with 803 calls in FY23/24 against 758 calls in FY22/23.

In the same vein for inter-island trade, total number of calls increase from 53 in FY22/23 to 61 in FY23/24.

9.1 Cruise Tourism

According to the report titled' State of the cruise industry September 2023' the Cruise Tourism rebounded faster than international tourism arrivals in 2023.

On the domestic front, this segment has regained its momentum with the resumption of the home-porting activities by Aida Cruises at Port Louis as well as the inauguration of the Port Louis Cruise Terminal in December 2023, which consolidates Port Louis position as the regional hub for cruise lines in the Indian Ocean, as detailed in Table 32.

Table 32: Total Cruise Traffic FY22/23 v/s 23/24

	Total No. of Cruise Passenger Arrivals				Total No. of Cruise Calls			
	FY22/23	FY23/24	Diff	% Change	FY22/23	FY23/24	Diff	% Change
Round the World	21,031	30,204	9,173	43.6	22	37	15	68.2
Homeport	-	20,625	-	-	-	10	10	-
Total	**21,031**	**50,829**	**29,798**	**141.7**	**22**	**47**	**25**	**113.6**

Cruise Passenger Arrivals
Similarly, the cruise passengers on arrival jumped from 21,031 for FY 22/23 to 50,829 in FY23/24

Cruise Vessel Calls
This segment for FY22/23 recorded 22 cruise vessel calls and, 47 cruise ships called at Port Louis in FY23/24. It should be noted that following the Red Sea crisis, some cruise ships have diverted their calls towards Port Louis to avoid that region. Out of a total of 47 cruise vessel calls, 17 were maiden calls at Port Louis as listed below:-

Date	Cruise Vessels	Length (mts)	Cruise Lines
15.11.2023	MSC Splendida	333	MSC cruises
18.11.2023	Vasco da Gama	219	Nicko cruises
07.12.2023	Le Jacques Cartier	132	Ponant cruises
19.12.2023	Hebridean Sky	91	Noble Caledonia cruises
08.01.2024	Bolette	238	Fred Olsen cruises
20.01.2024	Norwegian Dawn	294	Norwegian cruise
27.01.2024	Celestyal Journey	220	Celestyal cruises
11.02.2024	MSC Poesia	294	MSC cruises
12.02.2024	Hamburg	144	Plantours Kreuzfahrten
25.03.2024	Seabourn Encore	211	Seabourn cruise
30.03.2024	Viking Sky	228	Viking Ocean cruise
02.04.2024	Viking Neptune	228	Viking Ocean cruise
10.04.2024	Resilient Lady	278	Virgin Travel
04.05.2024	Azamara Onward	181	Azamara cruise
12.05.2024	Azamara Journey	181	Azamara cruise
13.05.2024	Coral Princess	294	Princess cruise
19.05.2024	Serenade of the Seas	293	Royal Caribbean International

Cruise Calls at Port Mathurin

There were 3 cruise vessel calls at Port Mathurin, Rodrigues in FY23/24 as detailed below.

Vessel Name	Arrival	Departure	No. of Passenger Arrivals
Le Champlain	12.12.2023	13.12.2023	63
Le Jacques Cartier	16.12.2023	17.12.2023	95
Le Champlain	25.12.2023	26.12.2023	90
Total 3 Calls			**248**

9.2 Calls at Outer Harbour

The number of vessels calling at Outer Harbour expanded from 1,198 vessel calls for the year FY22/23 to 1,938 calls during the current financial year, owing to the increasing number of vessels going round the Cape of Good Hope following the Red Sea crisis since November 2023 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 - FY22/23 v/s FY23/24

	FY22/23	FY23/24	Difference	% Change
Bunkering Only	711	1282	571	80.3
Crew Change	215	358	143	66.5
Ship Stores	56	81	25	44.6
Repairs or Inspection	116	103	-13	-11.2
Others	100	114	14	14
Total	**1,198**	**1938**	**740**	**61.8**

From Table 33, an expansion of 61.8% has been noted for the number of vessels calling at Outer harbour for the financial year under review.

In fact, expansions were recorded in the following segment; namely bunkering only (80.3%), Ship Stores (44.6%), crew change (66.5 %) and others (14 %) except for Repairs and Inspection segment (-11.2 %).

10. PERFORMANCE AT MULTI PURPOSE TERMINAL

10.1 Key Performance Indicators

Table 34: Key Performance Indicators at MPT - FY22/23 v/s FY23/24

	FY22/23	FY23/24
No. of Vessel Calls	5	4
No. of Containers	1,687	834
Avg. Moves /Gross Gang hr	5.0	5.1

- During FY23/24, 4 container vessel calls were registered at the MPT and some 834 TEUs were handled in comparison with 5 container vessels and 1,687 TEUs respectively.
- In FY23/24, the average gang productivity remained at par, i.e. 5.1 moves/gross gang hour.

10.2 Inter-Island Trade

Vessels plying between the dependencies of Mauritius (Rodrigues & Agalega) made 61 calls and handled some 14,497 TEUs in FY23/24 as depicted in the table 35.

Table 35: Intra-Island Trade traffic of Mauritius– FY22/23 v/s FY 22/23

	FY22/23	FY23/24
Breakdown of the total no. of voyages		
Black Rhino[1] (29-4)	25	25
Mauritius Trochetia[2] (26 -1)	25	24
MSM Douro[3] (4 -1)	3	nil
Peros Banhos	Nil	12
Total No. of Voyages	**53**	**61**
Breakdown of the total no. of containers		
Black Rhino	8,875	7,918
Mauritius Trochetia	4,318	2,391
Msm Douro	858	nil
Peros Banhos	nil	4,188
Total No. of Containers	**14,051**	**14,497**

10.3 Berth Occupancy @ MPT

Comparative Berth Occupancy for FY22/23 versus FY23/24 of the various berths at Terminals I and II are depicted in Table 36.

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1 Black Rhino effected 4 Calls in FY 22/23 & 1 call in FY23/24 at MCT, thus accounted as containerised vessel.

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

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

Table 36: Berth Occupancy at MPT - FY22/23 v/s FY23/24 (%)

Berth		FY22/23		FY23/24	
		Working	Total Occupied	Working	Total Occupied
Quay No. 1	Terminal II	19.9	54.2	27.3	68.8
Quay No. 2		23.7	70.3	23.0	72.9
Quay No. 3		20.6	67.6	18.5	73.1
Quay No. 4		19.8	66.3	19.0	75.2
Quay A	Terminal I	21.2	84.7	26.4	92.5
Quay D		9.6	68.3	11.1	80.1
Quay E		3.7	71.6	5.8	77.1
Bulk Sugar Terminal		6.0	9.9	3.7	11.7
Trou Fanfaron Fishing Quay 1		8.4	99.4	9.0	100
Trou Fanfaron Fishing Quay 2		5.6	98.9	6.4	100
Cruise Jetty		0	12.0	0	52.5
Oil Jetty		21.1	33.0	24.1	34.7
FDM		34.7	98.3	36.6	97.6
MFD		17.1	88.2	14.5	97.8

Apart from FDM, 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 with respect to working only has increased for Terminals 1 and 2, except for Quay no. 1.

11. CONTAINER TRAFFIC BY SHIPPING LINES

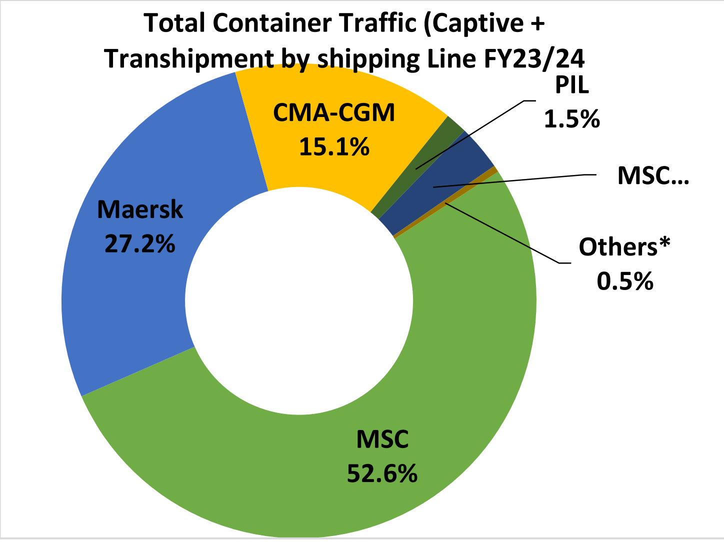
11.1 Total Container Traffic

Table 37: Total Container Traffic by Shipping lines – TEUs

Shipping Line	**FY22/23**	**% Share**	**FY23/24**	**% Share**	**Difference**	**% Change in Volume**
MSC	232,538	55.3	246,945	52.6	14,407	6.2%
Maersk	113,567	27.0	127,909	27.2	14,342	12.6%
CMA-CGM	51,081	12.2	71,096	15.1	20,015	-39.2%
PIL	8,031	1.9	6,950	1.5	-1,081	-13.5%
Mauritius Shipping Corporation Ltd. (MSCL)	14,051	3.3	14,497	3.1	446	3.2%
Others *	1,089	0.3	2,188	0.5	1099	100.9
Total	**420,357**	**100**	**469,585**	**100**	**49,228**	**11.7%**

* Others include: Hapag Lloyd and UAFL

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



Although MSC's share gone down from 55.3% to 52.6%, its total container traffic volume grew by 6.2% from 232,538 TEUs in FY22/23 to 246,945 TEUs in FY23/24.

Maersk's share in FY23/24 remained at par, i.e., 27.2%. However, a growth of 12.6 % has been noted in their volume for the financial year under review.

Similarly, CMA-CGM's share in total container traffic increased to 15.1% in FY23/24 from 12.2% in FY22/23 and its volume also expanded by 39.2%.

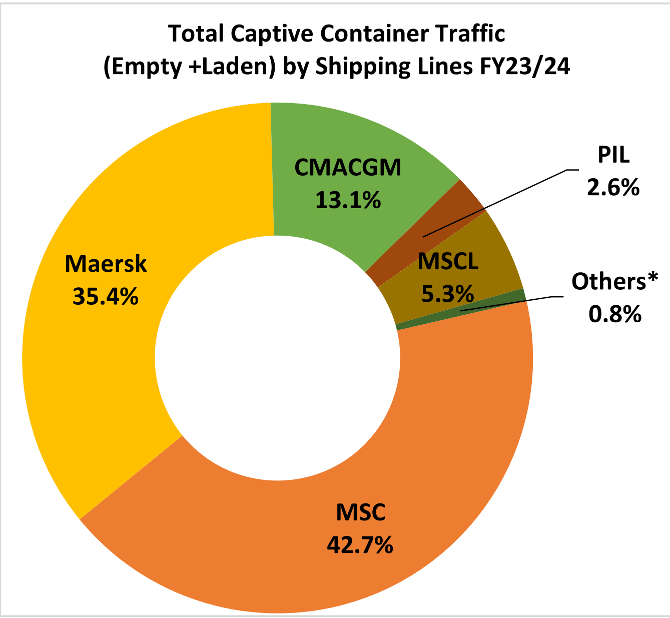
11.2. Total Captive Container Traffic

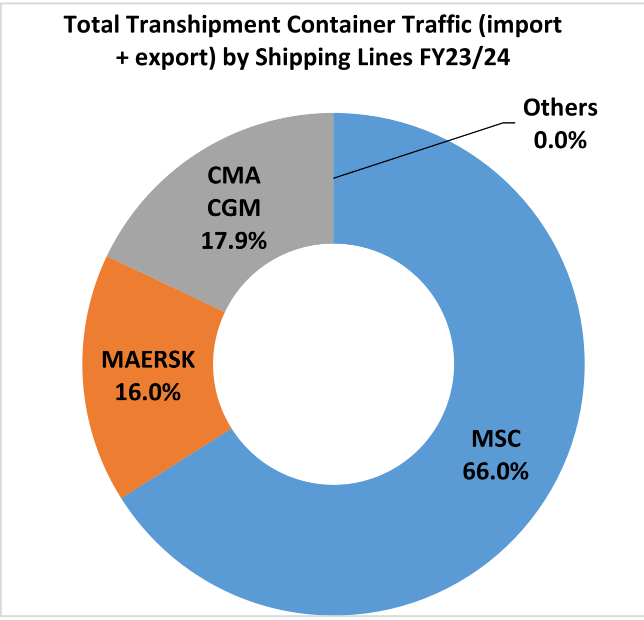
Total captive container traffic witnessed an increase of 9.4% with TEUs 271,003 in FY23/24 as opposed to 247,600 TEUs in FY22/23.

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

Shipping Line	FY22/23	FY23/24	Difference	% Change
MSC	97,861	115,802	17,941	18.3
Maersk	99,834	96,051	-3,783	-3.8
CMA-CGM	26,735	35,515	8,780	32.8
PIL	8,030	6,950	-1,080	-13.5
MSCL	14,051	14,497	446	3.2
Others *	1,089	2,188	1099	100.9
Total	**247,600**	**271,003**	**23,403**	**9.4**

* Others include: Hapag Lloyd, and UAFL





11.3 Total Transhipment Traffic

Total transhipment container traffic has noted an increase by 14.9 % for the financial year under review. It is worth noting that Maersk and CMA -CGM witnessed strong growth of 132.0% and 46.1 %, respectively whilst MSC noted a slight reduction of 2.6 %.

Table 39: Total Transhipment Traffic by Shipping Lines - TEUs

Shipping Line	FY22/23	FY23/24	Difference	% Change
MSC	134,677	131,143	-3,534	-2.6
Maersk	13,733	31,858	18,125	132.0
CMA-CGM	24,346	35,581	11,235	46.1
PIL	1	0	-1	-100
Total	**172,757**	**198,582**	**25,825**	**14.9**

12. MARKET SHARE BY MAJOR SHIPPING LINES

In FY23/24, the local market was shared as follows:

- Total Container Traffic: MSC held 52.6% of the market share followed by Maersk with a share of 27.2% and CMA-CGM with a share of 15.1% in FY23/24.
- Total Captive Container Traffic: MSC had a market share of 42.7% compared to Maersk share of 35.4 % and CMA-CGM's share of 13.1% in FY23/24.
- Total Transhipment Container Traffic: MSC, which holds the lion share, stood at 66% in FY23/24, followed by CMA-CGM's and Maersk with market share of 17.9% and 16.0%, respectively.

Table 40: Comparative Traffic Share in Container Traffic - FY22/23 v/s FY23/24

MSC	**Share FY22/23**	**Share FY23/24**
Total Container Traffic	55.3%	52.6% ↓
Total Captive Container Traffic	39.5%	42.7% ↑
Total Transhipment Container Traffic	78.0%	66.0% ↓
Maersk		
Total Container Traffic	27.0%	27.2% ↑
Total Captive Container Traffic	40.3%	35.4% ↓
Total Transhipment Container Traffic	7.9%	16.0% ↑
CMA-CGM		
Total Container Traffic	12.2%	15.1% ↑
Total Captive Container Traffic	10.8%	13.1% ↑
Total Transhipment Container Traffic	14.1%	17.9% ↑

13. TRANSHIPMENT ACTIVITIES BY SHIPPING LINES

13.1 Mediterranean Shipping Company Ltd (MSC)

Transhipment Inwards-TEUs	FY22/23	FY23/24	Difference	% Change
Laden	98,011	97,325	-686	-0.7
Empty	36,666	33,818	-2,848	-7.8
Total	**134,677**	**131,143**	**-3,534**	**-2.6**

Some 131,143 TEUs were transhipped by MSC during the current financial year as compared to 134,677 TEUs in FY22/23, i.e., a contraction of around 2.6%.

13.2 Maersk Line

Transhipment Inwards-TEUs	FY22/23	FY23/24	Difference	% Change
Laden	11,537	25,925	14,388	124.7
Empty	2,196	5,933	3,737	170.0
Total	**13,733**	**31,858**	**18,125**	**132.0**

The number of TEUs transhipped by Maersk Shipping Line stood at 31,858 TEUs in FY23/24 as opposed to 13,733 TEUs in FY22/23 i.e., an expansion of 18,125 TEUS.

13.3 CMA-CGM

Transhipment Inwards-TEUs	FY22/23	FY23/24	Difference	% Change
Laden	15,818	26,007	10,189	64.4
Empty	8,528	9,574	1,046	12.3
Total	**24,346**	**35,581**	**11,235**	**46.1**

The number of TEUs transhipped by CMA-CGM increased from 24,346 TEUs in FY22/23 to 35,581 TEUs in FY23/24.

14. DOWNTIME AT PORT

During the year under review, handling operations were disrupted at the port for about 13.9 days in FY23/24 (cyclones Belal, Candice &) Eleanor as compared to 16.6 days in FY22/23 (cyclone Freddy) owing to adverse weather conditions.

15. SHIPPING SERVICES FY23/24

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, Rotterdam, Hamburg, Antwerp, Le Havre, Valencia, La Spezia, Fos Sur Mer, Reunion, **Port Louis**, Sydney, Melbourne, Adelaide, Fremantle, Singapore, Ennore, Colombo to European Ports
	2. INGWE Southbound Service	Qingdao, Shanghai, Ningbo, Shekou, Singapore, Colombo, **Port Louis,** Coega, Durban
	3. INGWE Northbound Service	Coega, Durban, **Port Louis,** Colombo, Singapore, Hong Kong, Qingdao
	4. *Ilanga Express Service*	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**, Moroni, Majunga, Diego Suarez, **Port Louis**
	7. Indian Ocean Islands 3	**Port Louis**, Réunion, Tamatave, Colombo, **Port Louis**
	8. Indian Ocean Islands 4 (Fortnightly)	**Port Louis**, Nacala, Longoni, **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 - West Bound (VSA with CMA-CGM Shaka Service)	Shanghai, Ningbo, Shekou, Tanjung Pelepas, **Port Louis,** Durban, Tanjung Pelepas,
	2. M-Express Service - (VSA with CMA-CGM Mozex Service)	Reunion, Maputo, Beira, **Port Louis,** Singapore, Tanjung Pelepas.
	3. Indian Ocean Islands (Slot chartering by UAFL)	Salalah, Réunion, **Port Louis,** Toamasina, Port Victoria.
	4. Cape Town Express Service - (VSA with CMA-CGM)	Cape Town**, Port Louis**
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*	Réunion, Tamatave, Réunion, **Port Louis**
	2. IOI Feeder 1	Longoni, Majunga, Nosy Be, Diego Suarez, Réunion **Port Louis,** Réunion
	3.IOI Feeder 5	Réunion Tuléar, Ehoala/ Fort Dauphin, Réunion, **Port Louis**

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

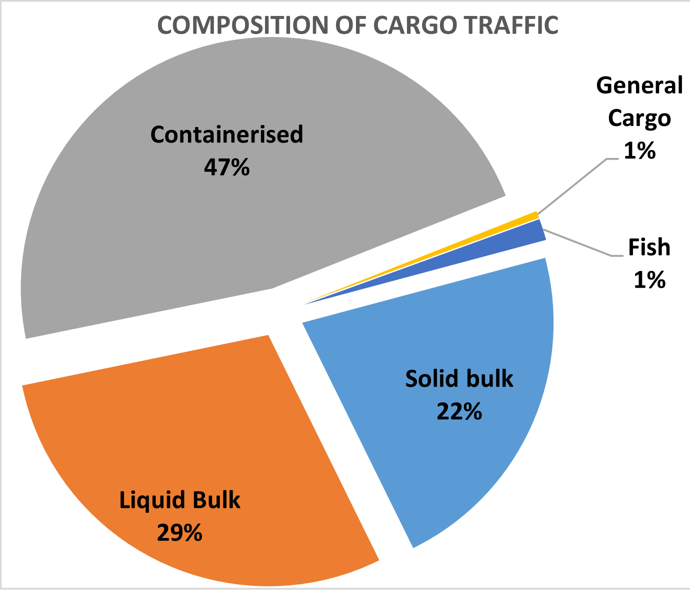
INTER-ISLAND TRADE	FREQUENCY	MAIN PORTS OF CALL
Mauritius Shipping Corporation Ltd 1st & 2nd Floor, Capitainerie Building, Quay D, Port Louis, 11601 Tel:(230) 217 2285 Fax: (230) 242 5245	Every 10 – 15 days by Peros Banhos 1 voyage per month by Mauritius Trochetia + additional calls upon request	Port 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 Agent: Southern Marine & Co. Ltd 3rd Floor, Capitainerie Building Quay D Port Louis Tel:(230) 216 0272 Fax:(230) 216 1020	Bremerhaven, Le Havre, Belgium, Southampton, Spain, Morocco, Port Elizabeth, Durban, Tamatave, Réunion, **Port Louis,** Singapore	**Mitsui O.S.K. Line (MOL)** Agent: Blyth Brothers & Co. Ltd. 8, Dr Ferrière St. Port Louis Tel: (230) 212 5134 Fax: (230) 208 0879	Japan, Singapore, **Port Louis** Indian ports to **Port Louis**	**GLOVIS** Agent: Sharaf Shipping Agency Ltd Pin Point Building Verdun Motorway M3, Riviere des Calebasses Tel :(230) 2458549	Korea, Chennai, Sri Lanka, **Port Louis,** Réunion, Durban

APPENDIX 1: COMPOSITION OF TOTAL CARGO TRAFFIC FY23/24

A. Total Cargo



Total Cargo Traffic (Dry Bulk, Liquid Bulk, Containerised Cargo, and General Cargo) handled in the Port increased from 7,524,936 tonnes in FY22/23 to reach 8,564,939 tonnes in FY23/24.

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 5,239,481 tonnes, equivalent to 61.2% of Total Cargo Traffic.

	FY22/23	Share	FY23/24	Share	Difference	% Change
Total Solid Bulk	1,720,537	23%	1,870,198	22%	149,661	8.7
Total Liquid Bulk	2,018,556	27%	2,501,485	29%	482,929	23.9
Total Containerised	3,608,122	48%	4,036,171	47%	428,049	11.9
Total General Cargo	46,582	1%	38,939	0.5%	-7,643	-16.4
Total Fish Traffic	131,139	2%	118,146	1%	-12,993	-9.9
Grand Total	**7,524,936**	**100%**	**8,564,939**	**100%**	**1,040,003**	**13.8**

B. Total Dry Bulk Cargo

Total Dry Bulk cargo, which registered a growth of 8.7%, equivalent to 149,661 tonnes, increased from 1,720,537 tonnes in FY22/23 to 1,870,198 tonnes in FY23/24.

Total Dry Bulk Cargo FY22/23 v/s FY23/24 (tonnes)

	FY22/23	FY23/24	Difference	% Change
Imports	1,720,537	1,870,198	149,661	8.7
Exports	-	-	-	-
Total	**1,720,537**	**1,870,198**	**149,661**	**8.7**

C. Total Liquid Bulk Cargo

Total Liquid Bulk expanded from 2,018,556 tonnes in FY22/23 to 2,501,485 tonnes in FY23/24, witnessing an increase of 23.9 %, equivalent to 482,929 tonnes.

Total Liquid Bulk Cargo FY22/23 v/s FY23/24 (tonnes)

	FY22/23	FY23/24	Difference	% Change
Imports	1,589,186	1,766,629	177,443	11.1
Exports	429,370	734,856	305,486	71.1
Total	**2,018,556**	**2,501,485**	**482,929**	**23.9**

D. Containerised Cargo

Total Containerised Cargo soared from 3,608,122 tonnes in FY22/23 to 4,036,171 tonnes in FY23/24, representing a double-digit growth of 11.9 % as summarised below.

Containerised Cargo Traffic FY22/23 v/s FY23/24 (tonnes)

	FY22/23	FY23/24	Difference	% Change
Imports	1,416,253	1,563,940	147,687	10.4
Exports	648,602	634,877	-13,725	-2.1
Transhipment (inwards)	1,543,267	1,837,354	294,087	19.1
Total	**3,608,122**	**4,036,171**	**428,049**	**11.9**

E. General Cargo Traffic

General Cargo, comprising all vehicles tonnage, inter-island, bagged cargo, and unitised break bulk but excluding fish traffic, contracted by 16.4% (equivalent to 7,643 tonnes) with 38,939 tonnes in FY23/24 as compared to 46,582 tonnes in FY22/23.

General Cargo Traffic FY22/23 v/s FY23/24 (tonnes)

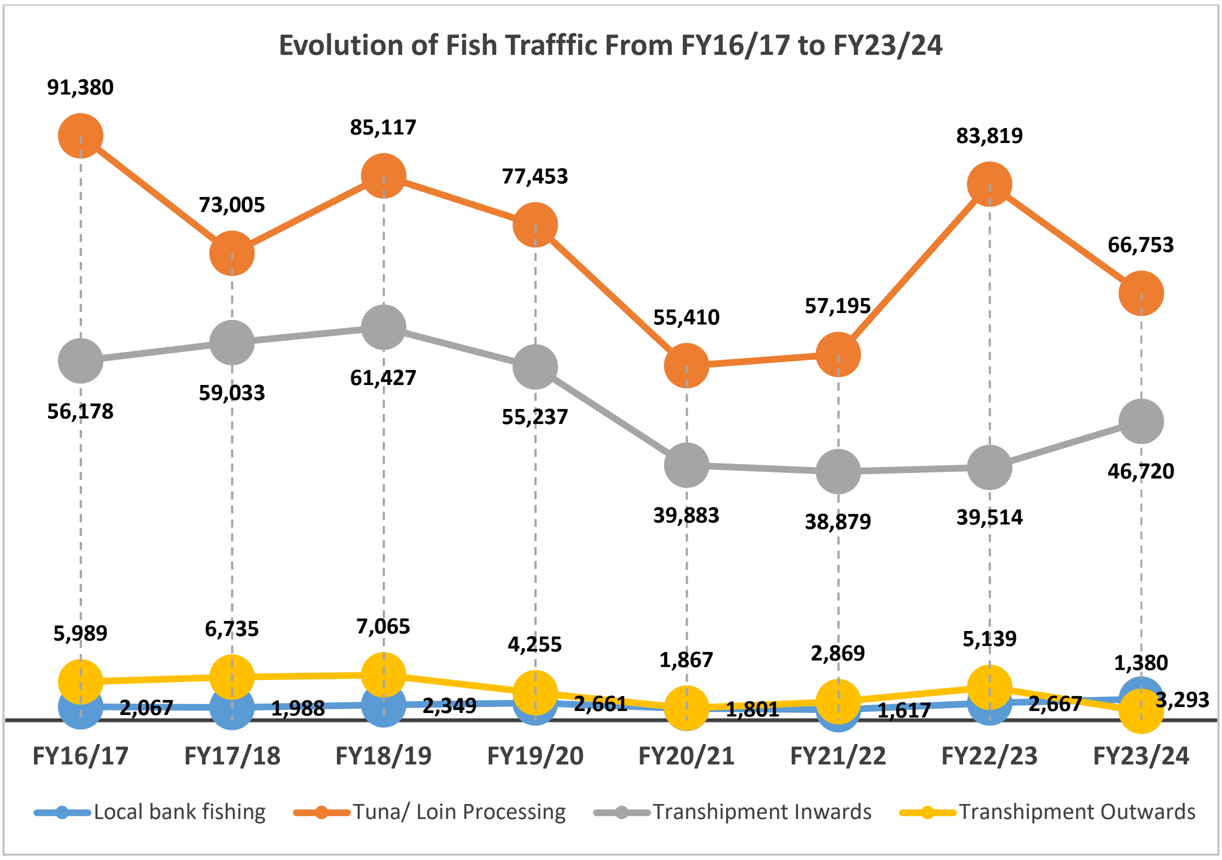
	FY22/23	FY23/24	Difference	% Change
Imports	41,552	34,707	-6,845	-16.5
Exports	5,030	4,232	-798	-15.9
Total	**46,582**	**38,939**	**-7,643**	**-16.4**

F. Fish Traffic

Total Fish Traffic decreased by 9.9% from 131,139 tonnes in FY22/23 to 118,146 tonnes in FY23/24.

Total Fish Traffic FY22/23 v/s FY23/24 (tonnes)

	FY22/23	FY23/24	Difference	% Change
Princes Tuna	83,819	66,753	-17,066	-20.4
Local Market	2,667	3,293	626	23.5
Transhipment Inwards	34,375	45,340	10,965	31.9
Direct Transhipment Inwards (ship to ship)	5,139	1,380	-3,759	-73.1
Direct Transhipment Outwards (ship to ship)	5,139	1,380	-3,759	-73.1
Grand Total	**131,139**	**118,146**	**-12,993**	**-9.9**



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