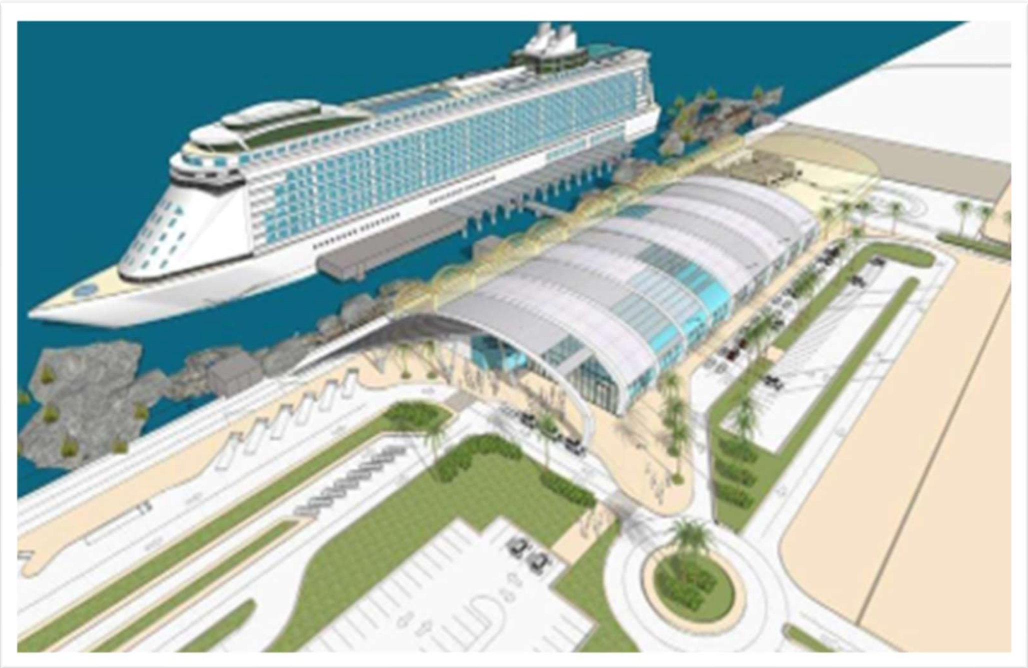
Port Trade Performance
CY2019 versus CY2020



20.04.2021

Table of Contents

Port Trade Performance CY2020

1. KEY FIGURES AT A GLANCE

Total Trade Volume	**7.4**	**Million tonnes**	**(-13.0%)**
• Containerised Cargo	3.6	Million tonnes	(-10.3%)
• Dry Bulk Cargo	1.7	Million tonnes	(-11.3 %)
• Liquid Bulk Cargo	2.0	Million tonnes	(-16.3%)
• Fish Traffic	105,636	tonnes	(-35.3%)
Total Container Traffic	**438,078**	**TEUs**	**(-6.6%)**
• Captive Container	245,736	TEUs	(-11.0%)
• Transhipment Container Inwards	192,342	TEUs	(-0.3%)
• Transhipment Container Outwards	192,494	TEUs	(+0.2%)
Total Container Throughput	**640,159**	**TEUs**	**(-4.4%)**
Total Vessel Traffic	2776	calls	(-21.5%)
• Containerised Vessels	465	calls	(-15.6%)
• Fishing Vessels	765	calls	(-32.8%)
Cruise Traffic			
• Cruise Vessel	20	calls	(-47.4%)
• Passengers on Arrival	30,577	passengers	(-48.7%)
• Passengers on Departure	28,955	passengers	(-51.7%)
Total Bunker Traffic • Pipeline	640,746 76,061	**tonnes** tonnes	**(-3.1%)** (-32.2%)
• Barges	564,685	tonnes	(+2.8%)

2. INTRODUCTION

The global health and economic crisis triggered by the pandemic has upended the landscape for maritime transport and trade and significantly affected economic activities. According to IMF (January 2021-World Economic Outlook update), the global economy growth contraction for 2020 is estimated at -3.5%. In the same vein, the World Trade Organisation pointed out that the volume of world merchandise is estimated to note a 9.2% decline in 2020.

The pandemic has had a significant impact on the shipping industry. On the one hand, lockdowns and factory closures gradually affected demand for maritime transport, due to reduced cargo volumes. On the other hand, safety measures applied to contain the spread of the virus, such as lockdowns and travel restrictions, affected movement of maritime transport workers and procedural changes introduced in ports and induced operational disruptions in the supply of maritime transport. However, with the grounding of airplanes, the pandemic has brought to the fore the importance of maritime transport as an essential sector for the continued delivery of critical supplies and global trade in time of crisis.

The domestic economy suffered its worst ever slump as the national lockdown and closure of borders around mid-March 2020 disrupted economic activities. According to National Accounts Estimates (December 2020), the GDP at market prices would contract by 15.2%, which mark the country's worst contraction since 1980. The downturn in global and domestic activities in 2020 took a heavy toll on the port trade performance.

The total cargo traffic tumbled to 7.4 million tonnes in 2020 as compared to 8.5 million tonnes recorded in CY2019, representing a drop 13.0%.

Similarly, total container traffic registered a 6.6% decline during the CY2020 with 438,078 TEUs as compared to 469,011 TEUs in CY2019. For the period under review, both captive and transhipment container traffic posted a contraction of 11.0% and 0.3% respectively.

Likewise, the port witnessed a decline of 21.5% in the total vessels calls, from 3,536 in CY2019 to 2,776 recorded in CY2020.

3. TOTAL CARGO TRAFFIC

Total Cargo tonnage handled in the port stood at 7,421,764 tonnes in CY2020 as compared to 8,517,345 tonnes in CY2019, a decrease of 12.9%, equivalent to 1,095,581 tonnes, as summarised in Table 1.

Table 1: Total Cargo Traffic – CY2019 v/s CY2020 (tonnes)

	CY2019	CY2020	Difference	% Change
Total Imports	5,399,842	4,547,151	-852,691	-15.8
Total Exports	1,414,134	1,291,720	-122,414	-8.7
Total Containerised Transhipment Inwards	1,703,369	1,582,893	-120,476	-7.1
Total	**8,517,345**	**7,421,764**	**-1,095,581**	**-12.9**

Total Imports

Total Imports Traffic dropped by 15.8% from 5,399,842 tonnes in CY2019 to reach 4,547,151 tonnes in CY2020 as there were decreases recorded in all segments, namely solid bulk (-11.2%), liquid bulk (-20.2%), containerised cargo imports (- 14.3%), fish (-32.3%) and general cargo (37.4%)

Total Exports

Total exports have contracted by 8.7% and stood at 1,291,720 tonnes in CY2020 as compared to 1,414,134 tonnes in CY2019.

It should be noted that there were reductions recorded in all segments, namely; containerised (-8.8%), liquid bulk (-6.8%), dry bulk cargo (-66.1%), general cargo (-32.0%) and fish (-93.3%) for the calendar year under review.

Total Containerised Transhipment Inwards

Total Containerised Transhipment Inwards traffic has plummeted to 1,582,893 tonnes in CY2020 as compared to 1,703,369 tonnes in CY2019, a decrease of 7.1% equivalent to 120,476 tonnes.

The laden transhipment inwards container traffic has gone down owing to the disruption in the global supply chain following the outbreak of the Covid-19 pandemic.

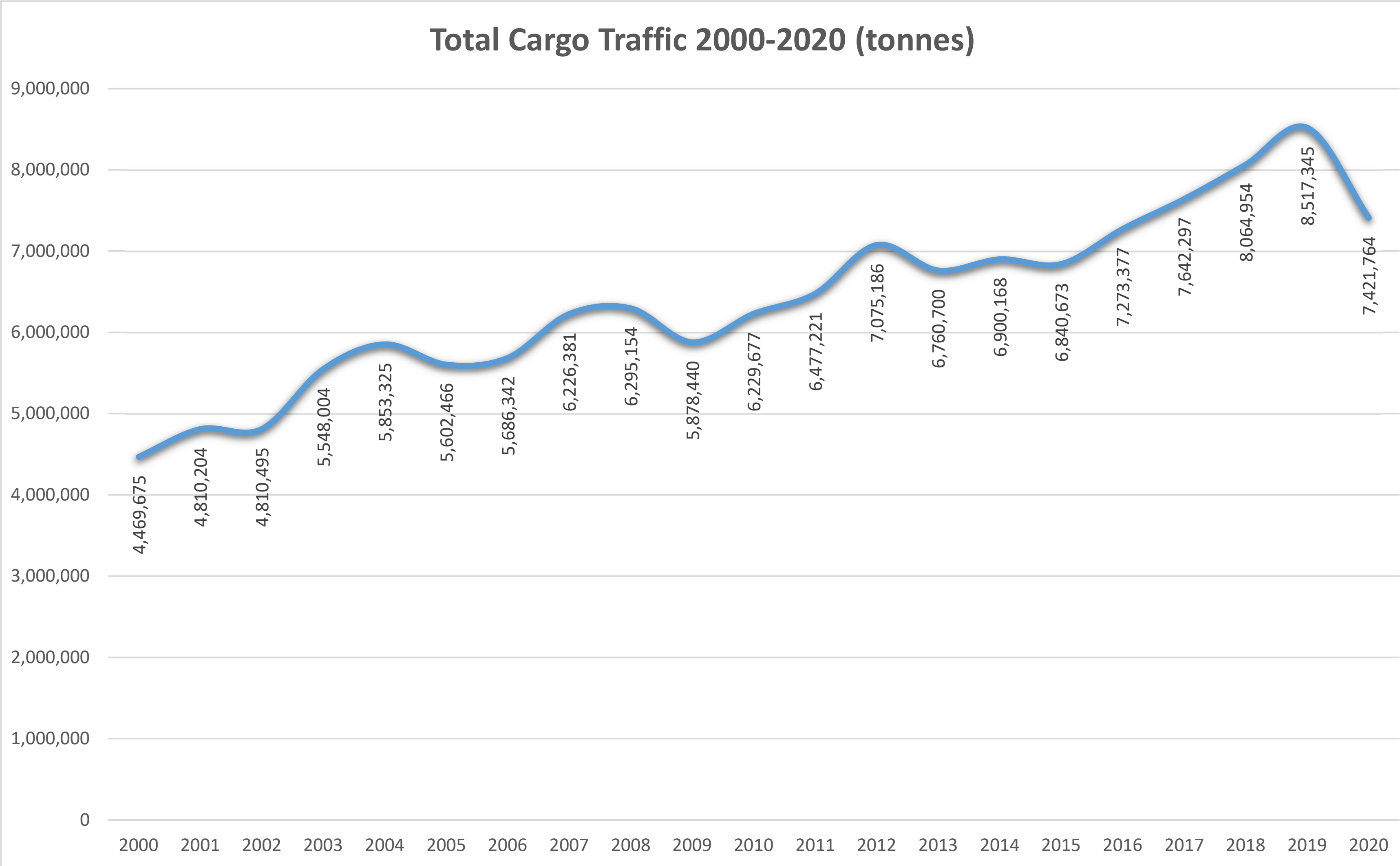


Figure 1: Evolution of Total Cargo Traffic (tonnes)

4. TOTAL IMPORTS

Total Imports declined by 15.8%, with 4,547,151 tonnes in CY2020 as compared to 5,399,842 tonnes in CY2019. All segments were badly affected for the calendar year under review. Table 2 illustrates the breakdown of Total Imports

Table 2: Breakdown of Total Imports CY2019 v/s CY2020 (tonnes)

Imports	CY2019	CY2020	Difference	% change
Solid Bulk	1,888,320	1,677,469	-210,851	-11.2
Liquid Bulk	1,717,989	1,370,038	-347,951	-20.2
Containerised	1,599,417	1,370,265	-229,152	-14.3
Fish	155,321	105,101	-50,220	-32.3
General cargo	38,795	24,278	-14,517	-37.4
Total	**5,399,842**	**4,547,151**	-852,691	**-15.8**

4.1 Solid (Dry) Bulk Imports

Solid bulk imports have witnessed a decline of 11.2%, equivalent to 210,851 tonnes, from 1,888,320 tonnes in CY2019 to 1,677,469 tonnes in CY2020 as detailed in Table 3.

Table 3: Solid Bulk Imports – CY2019 v/s CY2020 (tonnes)

	CY2019	CY2020	Difference	% Change
Coal	698,896	647,555	-51,341	-7.3
Cement	777,873	683,576	-94,297	-12.1
Wheat	150,316	124,952	-25,364	-16.9
Sugar	83,060	42,000	-41,060	-49.4
Maize	119,890	124,719	4829	4.0
Soya Bean Meal	53,785	54,667	882	1.6
Fertilizer	4,500	-	-4,500	-100
Total	**1,888,320**	**1,677,469**	**-210,851**	**-11.2**

- Coal imports showed a decrease of 7.3%, with 647,555 tonnes in CY2020 as compared to 698,896 tonnes in CY2019, reflecting the impact of Covid-19 on the energy sector. According to Central Electricity Board, the demand for electricity had gone down by almost one third during the lockdown period.

- Bulk Cement imports decreased by 12.1% to reach 683,576 tonnes in CY2020 as compared to 777,873 tonnes. This could be attributed to contractions in both public and private sector investment programme which is estimated to -33.0% and -24.3%, respectively during the CY2020. According to National Accounts Estimates (December 2020), the construction sector is estimated to relapse by 25.4% after three consecutive years of positive growth.

  Headwinds from the pandemic were felt initially through the disruption in the supply and distribution of building materials and construction equipment that led to delays in some projects as well as the toll on investors' confidence led to the postponement of some construction ventures.

- For the year under review, imports of wheat noted a decline of 16.9%, with 124,952 tonnes in CY2020 as compared to 150,316 tonnes in CY2019, reflecting the impact of Covid-19 on the hospitality sector which has been badly hit following travel restriction as well as restrictions imposed by wheat exporting countries following the outbreak of the pandemic.

- Bulk sugar import has gone down from 83,060 tonnes in CY 2019 to 42,000 tonnes in CY2020. It is worth noting that this traffic is driven by the production mix which favours the production of a larger quantity of special sugar from the raw sugar produced locally. Since less raw sugar is available for refinery, raw sugar needs to be imported.

- Maize and soya bean meal imports are mainly used in the production of animal feed. For the year under review, Soya Bean Meal and maize imports have registered an expansion of 1.6% and 4.0% respectively. However, it is to be noted that the combined maize and soya bean meal imports have practically witnessed a slight increase, reflecting the inelasticity of food items, whereby the volume is almost non-responsive to changes in price and income.

- No import of fertilizer was effected during the calendar year 2020 as compared to 4,500 tonnes in CY2019. However, it is important to note that bulk fertilizer is also being imported in containers.

4.2 Liquid Bulk Imports

Total imports of liquid bulk contracted by 20.2%, representing 347,951 tonnes, i.e. from 1,717,989 tonnes in CY2019 to 1,370,038 tonnes in CY2020 as summarised in table 4.

Table 4: Liquid Bulk Imports - CY2019 v/s CY2020 (tonnes)

	CY2019	**CY2020**	**Difference**	**% Change**
White oil	748,380	547,047	-201,333	-26.9
Black oil	831,000	725, 945	-105,055	-12.6
LPG	116,337	77,050	-39,287	-33.8
Edible oil	15,000	14,480	-520	-3.5
Bitumen	7,272	5,516	-1,756	-24.1
Total	**1,717,989**	**1,370,038**	**-347,951**	**-20.2**

- Imports of White oil noted a fall of 26.9% from 748,380 tonnes in CY2019 to 547,047 tonnes in CY2020, reflecting the disruptions caused by the Covid-19 pandemic. Domestic transportation was badly hit owing to lockdown whilst aviation sector is affected following the closure of our international borders.

- Imports of Black oil decreased slightly from 831,000 tonnes in CY2019 to 725,945 tonnes in CY2020, representing a drop of 12.6%. This traffic is mainly affected by the fall in the demand for electricity during the lockdown as oil fired station generates the bulk of electricity in Mauritius. It is worth noting that the volume of bunker has also witnessed a decrease.

- Imports of LPG dropped by 33.8% from 116,337 tonnes in CY2019 to 77,050 tonnes in CY2020, reflecting the impact of the Covid-19 on the hospitality industry as well as the fall in exports of LPG. The decision to lease the Petredec LPG facility to STC implies that priority will be given to imports for domestic market which hovers around 78,000 tonnes annually and exports of LPG are likely to be phased out in the short term.

- For the year under review, imports of Edible Oil noted a decline of 3.5% from 15,000 tonnes to 14,480 tonnes. This could be attributed to the decline in accommodation and food service activities which is estimated to plummet by 67.4%, according to National Accounts Estimates (December 2020).

- Bitumen imports has noted a drop of 24.1% for the calendar year under review. This fall could be attributed to the stock built up during the lockdown as well as the contraction in the public sector investment which is estimated at 33.0%, according to National Accounts Estimates (December 2020).

4.3 Containerised Cargo Imports

Total containerised imports decreased by 14.3%. The breakdown of this traffic in Table 5 reveals that captive containerised cargo imports contracted by 14.7% whilst inter-island containerised imports expanded by 47.4%.

Table 5: Containerised Cargo Imports – CY2019 v/s CY2020 (tonnes)

	CY2019	CY2020	Difference	% Change
Captive	1,588,904	1,354,770	-234,134	-14.7
Inter-Island	10,513	15,495	4,982	47.4
Total	**1,599,417**	**1,370,265**	**-229,152**	**-14.3**

4.4 General Cargo Imports

Total General Cargo Imports witnessed a decline of 37.4%. The breakdown of this traffic in Table 6 shows that both unitized and inter island general cargo imports witnessed a negative growth of 26.5% and 87.5%.

Table 6: General Cargo Imports – CY2019 v/s CY2020 (tonnes)

	CY2019	CY2020	Difference	% Change
Unitized Break Bulk	31,860	23,409	-8,451	-26.5
Inter-Island	6,935	869	-6,066	-87.5
Total	**38,795**	**24,278**	**-14,517**	**-37.4**

4.5 Fish Traffic Imports

Total fish imports posted a drop of 32.3%, with 105,101 tonnes in CY2020 as compared to 155,321 tonnes in CY2019 due to the impact of Covid-19 pandemic on the fishing activities. In fact, this segment borne the brunt of the sanitary measures imposed and travel restriction as well as the increase in license fee for foreign fishing vessels.

At the same time, it is worth noting that the total number of fishing vessels calling at Port Louis have significantly decreased from 1,101 calls in CY2019 to 754 calls recorded in CY2020, representing a drop of 31.5%.

Table 7: Fish Traffic Imports - CY2019 v/s CY2020 (tonnes)

	Volume (tonnes)				Vessel Calls			
	CY2019	**CY2020**	**Difference**	**% Change**	**CY2019**	**CY2020**	**Difference**	**% Change**
Tuna/ Loin Processing	93,356	56,675	-36,681	-39.3	37	19	-18	-48.6
Local Market	2,950	2,189	-761	-25.8	350	289	-61	-17.4
Transhipment Inwards	50,995	45,702	-5,293	-10.4	619	423	-196	-31.7
Direct Transhipment Inwards	8,020	535	-7,485	-93.3	95	23	-72	-75.8
Total	**155,321**	**105,101**	**-50,220**	**-32.3**	**1,101**	**754**	**-347**	**-31.5**

- Imports of Tuna as raw materials by Princess Tuna and Thon des Mascareignes decreased by 39.3% from 93,356 tonnes in CY2019 to 56,675 tonnes in CY2020, reflecting supply chain disruption owing to Covid-19 pandemic.

- Conversely, fish production in our oceanic banks, mainly meant for the local market, has also gone down by 25.8% from 2,950 tonnes in CY2019 to 2,189 tonnes in CY2020. The number of fishing vessels' calls noted a decrease of 17.4% during the current calendar year owing to the lockdown as well as the sanitary measures.

- Fish transhipment activity has decreased by 10.4%, with 45,702 tonnes in CY2020 against 50,995 tonnes recorded in CY2019.

  Besides the above mentioned challenges, it is worth noting that the soaring freight rate has impacted negatively on the imports of containers stuffed with baits and fishing equipment. As a result, it has been reported that the owners of fishing vessels calling at Port Louis are using one of their own carriers to supply provisions and baits to their fishing vessels and simultaneously undertaking direct transhipment at high seas, which are allowed according to IOTC regulations.

- In the same vein, direct ship to ship transhipment has gone down from 8,020 tonnes in CY2019 to 535 tonnes recorded during the current calendar year, representing a drop of 93.3%.

5. TOTAL EXPORTS

Total exports decreased by 8.7% and stood at 1,291,720 tonnes in CY2020 as compared to 1,414,134 tonnes in CY2019.

Table 8: Breakdown of Total Bulk Exports - CY2019 v/s CY2020 (tonnes)

Exports	CY2019	CY2020	Difference	% change
Dry Bulk	2,953	1,000	-1,953	-66.1
Liquid Bulk	700,966	653,537	-47,429	-6.8
Containerised	687,627	626,740	-60,887	-8.8
General cargo	14,568	9,908	-4,660	-32.0
Fish	8,020	535	-7,485	-93.3
Total	**1,414,134**	**1,291,720**	**-122,414**	**-8.7**

5.1 Dry Bulk Exports

Some 1,000 tonnes of Soya Bean Meal were exported in CY2020 as opposed to some 2,953 tonnes of aggregates exported in CY2019.

5.2 Liquid Bulk Exports

Exports of Liquid Bulk cargo registered a negative growth of 6.8% from 700,966 tonnes in CY2019 to 653,536 tonnes in CY2020, equivalent to 47,430 tonnes as detailed in Table 9.

Table 9: Breakdown of Liquid Bulk Exports - CY2019 v/s CY2020 (tonnes)

	CY2019	CY2020	Difference	% Change
Total Bunker	661,474	640,746	-20,728	-3.1
LPG	37,641	6,404	-31,237	-83.0
Ethanol	1,851	6,386	4,535	245.0
Grand Total	**700,966**	**653,536**	**-47,430**	**-6.8**

- Exports of LPG tumbled from 37,641 tonnes recorded in CY2019 to 6,404 tonnes in CY2020, registering a negative growth of 83.0%. Following the leasing of Petredec LPG storage facility to STC, domestic market is being favoured over exports to foreign market.

- The export of Ethanol went up from 1,851 tonnes in CY2019 to 6,386 tonnes in CY2020, registering a growth of 245.0%.

- Bunker exports which accounts for the bulk of total liquid exports contracted by 3.1%, equivalent to a decrease of some 20,728 tonnes. The breakdown hereunder reveals that refuelling by barge activity remains resilient.

5.2.1 Bunkering Activities

Total volume of bunker decreased by 3.1% from 661,474 tonnes in CY2019 to reach 640,746 tonnes in CY2020 as outlined in Table 10.

Table 10: Total Bunker Exports – CY2019 v/s CY2020

	Volume in Tonnes				**Vessel Calls**			
	CY2019	**CY2020**	**Difference**	**% Change**	**CY2019**	**CY2020**	**Difference**	**% Change**
Bunker by pipeline	112,258	76,061	-36,197	-32.2	1,352	996	-356	-26.3
Bunker by barge	549,216	564,685	15,469	2.8	1,088	1,069	-19	-1.7
Total	**661,474**	**640,746**	**-20,728**	**-3.1**	**2,440**	**2,065**	**-375**	**-15.4**

<u>Bunker Volume</u>

- Table 10 shows that volume of bunker by pipeline has noted a fall of 32.2% and stood at 76,061 tonnes in CY2020 against 112,258 tonnes in CY2019 as vessels calling for commercial purpose, including fishing vessels and crew change have been on the down side owing to sanitary measures and closure of international borders.

- On the other hand, the exports of Bunker by barge, which accounts for the bulk of total bunkers have increased from 549,216 tonnes in CY2019 to 564,685 tonnes in CY2020, representing a growth of 2.8%.

<u>Bunker Calls</u>

The number of vessels refuelling at Port Louis has declined from 2,440 calls in CY2019 to 2,065 calls in CY2020, posting a negative growth of 15.4%.

It is worth noting that no. of vessel calls for bunker both through pipeline and barge dropped by 26.3% and 1.7%, respectively for the year under review.

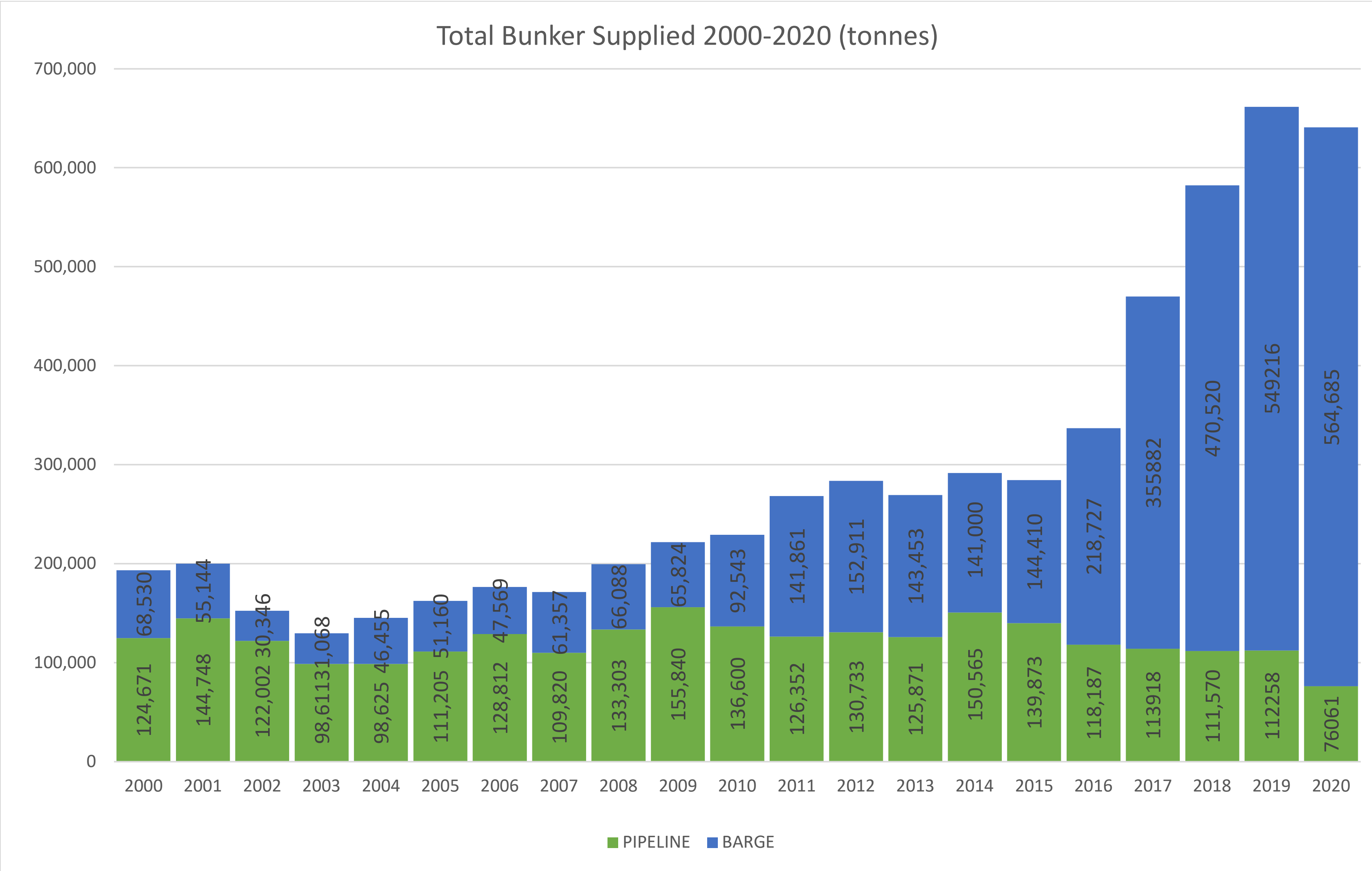


Figure 2 depicts the evolution of total bunker traffic from 2000 to 2020.

5.3 Containerised Cargo Exports

Total containerised cargo exports registered a negative growth of 8.8% from 687,627 tonnes in CY2019 to 626,740 tonnes in CY2020. The breakdown of this traffic reveals that inter-island containerised exports noted an expansion of 6.9% whilst captive containerised exports declined by 10.7%.

Table 11: Containerised Exports – CY2019 v/s CY2020 (tonnes)

	CY2019	CY2020	Difference	% Change
Captive	614,815	548,877	-65,938	-10.7
Inter-Island	72,812	77,863	5,051	6.9
Total	**687,627**	**626,740**	**-60,887**	**-8.8**

5.4 General Cargo Exports

Total General Cargo Exports witnessed a significant contraction of 32.0%. The breakdown of this traffic shows that Unitized Break Bulk noted an expansion to the tune of 92.0% and Inter-Island exports plummeted by 35.9%.

Table 12: General Cargo Exports – CY2019 v/s CY2020 (tonnes)

	CY2019	CY2020	Difference	% Change
Unitized Break Bulk	451	866	415	92.0
Inter-Island	14,117	9,042	-5,075	-35.9
Total	**14,568**	**9,908**	**-4,660**	**-32.0**

5.5 Fish Traffic Exports

For the CY2020, direct transhipment outwards of fish stood at 535 tonnes as opposed to 8,020 tonnes in CY2019, representing a decline of 93.3%. Similarly, a drop of 69.4% has been noted in the number of vessel calls for the calendar year under review.

Table 13: Fish Exports – CY2019 v/s CY2020 (tonnes)

	Volume in Tonnes				No of vessel Calls			
	CY2019	CY2020	Difference	% change	CY2019	CY2020	Difference	% change
Direct Transhipment outwards (ship to ship)	8,020	535	-7,485	-93.3	36	11	-25	-69.4

6. TOTAL CONTAINER TRAFFIC

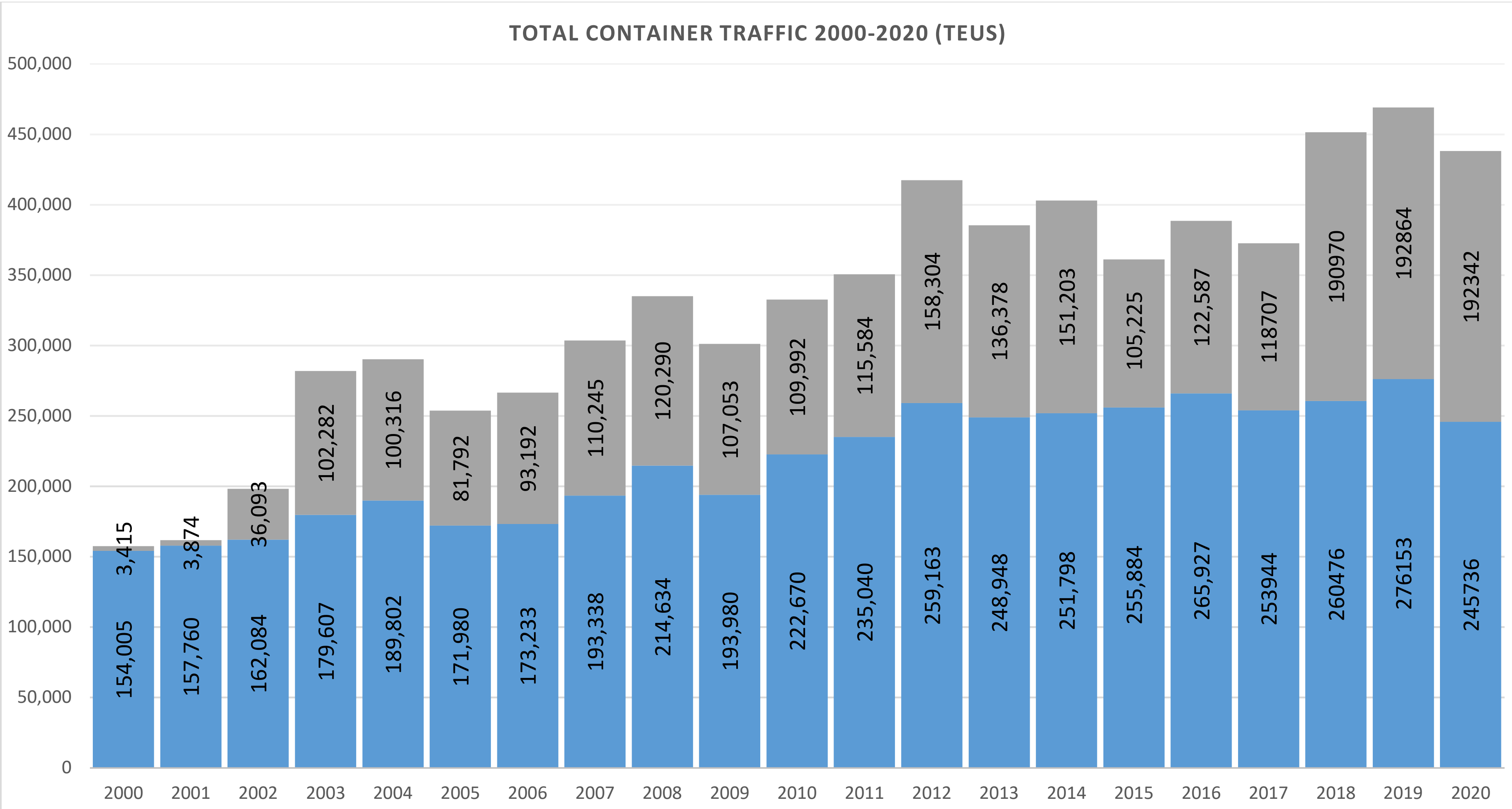
Total Container Traffic (excluding paid restows) witnessed a decline of 6.6%, equivalent to 30,933 TEUs from 469,011 TEUs in CY2019 to 438,078 TEUs in CY2020.

It is worth noting that both captive container traffic and transhipment container traffic registered contractions of 11.0% and 0.3%, respectively. Details are summarised in Table 14.

Table 14: Total Container Traffic – CY2019 v/s CY2020 (TEUs)

	CY2019	CY2020	Difference	% Change
Captive	276,147	245,736	-30,411	-11.0
Transhipment	192,864	192,342	-522	-0.3
Total	**469,011**	**438,078**	**-30,933**	**-6.6**

Figure 3 depicts the evolution of total container traffic at Port Louis from 2000 to 2020



6.2 Total Captive Container Traffic

Total Captive Container Traffic tumbled from 276, 147 TEUs to 245,736 TEUs, representing a decline to the tune of 11%. Table 15 shows the comparative monthly captive container traffic for the calendar year under review.

Table 15: Total Captive Container Traffic - CY2019 v/s CY2020 (TEUs)

	CY2019	CY2020	Difference	% Change
Jan	24,301	21,221	-3,080	-12.7
Feb	23,367	26,344	2,977	12.7
Mar	24,321	13,055	-11,266	-46.3
Apr	25,439	18,666	-6,773	-26.6
May	25,075	26,840	1,765	7.0
Jun	20,786	16,484	-4,302	-20.7
Jul	21,134	16,029	-5,105	-24.1
Aug	22,629	18,456	-4,173	-18.4
Sep	24,360	19,572	-4,788	-19.7
Oct	23,884	23,467	-417	-1.8
Nov	22,637	21,825	-812	-3.6
Dec	18,214	23,777	5,563	30.5
Total	**276,147**	**245,736**	**-30,411**	**-11.0**

Total container traffic was seriously hit by the impact of the Covid-19 pandemic. Moreover, it should be noted that CHCL was operating around 40% of its capacity at the beginning of the lockdown period as well as some liner services were temporarily suspended during CY2020.

6.1.1 Captive Laden Import Container Traffic

Laden import container traffic witnessed a decline of 14.3% equivalent to 18,332 TEUs with a total of 109,621 TEUs in CY2020 as compared to 127,953 TEUs in CY2019 as shown in Table 16.

Table 16: Captive Laden Import Container Traffic - CY2019 v/s CY2020 (TEUs)

	CY2019	CY2020	Difference	% Change
Jan	11,629	10,070	-1,559	-13.4
Feb	8,343	9,172	829	10.0
Mar	11,269	6,727	-4,542	-40.3
Apr	11,237	10,631	-606	-5.4
May	11,501	8,291	-3,210	-27.9
Jun	9,414	6,132	-3,282	-34.9
Jul	10,276	7,004	-3,272	-31.8
Aug	10,201	9,005	-1,196	-11.7
Sep	10,773	9,274	-1,499	-13.9
Oct	11,368	11,770	402	3.5
Nov	11,955	10,657	-1,298	-10.9
Dec	9,987	10,888	901	9.0
Total	**127,953**	**109,621**	**-18,332**	**-14.3**

A significant decline in laden imports has been noted as from March 2020, reflecting the disruption in the global supply chain and the socio-economic impacts of Covid-19, including contractions in GDP, consumption, investment and exports as well as rising unemployment and poverty.

According to National Accounts Estimates (December 2020), manufacturing, hospitality and construction were expected to plunge by 20.1%, 67.4% and 25.4%, respectively in 2020.

6.1.2 Captive Laden Export Container Traffic

Captive laden export container traffic witnessed a decline of 8.8% equivalent to 4,871 TEUs with a total of 50,139 TEUs in CY2020 as compared to 55,010 TEUs in CY2019. The detailed results are outlined in Table 17.

Table 17: Captive Laden Export Container Traffic - CY2019 v/s CY2020 (TEUs)

	CY2019	CY2020	Difference	% Change
Jan	3,918	4,321	403	10.3
Feb	4,313	5,485	1,172	27.2
Mar	4,751	3,382	-1,369	-28.8
Apr	4,396	2,412	-1,984	-45.1
May	3,889	3,090	-799	-20.6
Jun	4,712	4,061	-651	-13.8
Jul	4,280	4,146	-134	-3.1
Aug	6,314	4,652	-1,662	-26.3
Sep	5,276	4,055	-1221	-23.1
Oct	5,125	5,178	53	1.0
Nov	4,264	4,633	369	8.6
Dec	3,772	4,724	952	25.2
Total	**55,010**	**50,139**	**-4,871**	**-8.8**

According to Statistics Mauritius, the activities of the Export Oriented Enterprises are estimated to shrink by 22.2% in 2020 largely due to the lockdown as well as weak external demand conditions.

Exports took a plunge in April 2020, the month during which Mauritius was under complete lockdown and started recovering as from May 2020.

6.1.3 Captive Empty Import Container Traffic

Captive empty import container traffic decreased by 3,393 TEUs from 13,263 TEUs in CY2019 to 9,870 TEUs in CY2020, representing a fall of 25.6% for the year under review. Details are outlined in Table 18.

Table 18: Captive Empty Import Container Traffic CY2019 v/s CY2020 (TEUs)

	CY2019	CY2020	Difference	% Change
Jan	1,153	747	-406	-35.2
Feb	1,210	1,404	194	16.0
Mar	754	580	-174	-23.1
Apr	660	403	-257	-38.9
May	541	619	78	14.4
Jun	1,000	1,014	14	1.4
Jul	878	1,012	134	15.3
Aug	2,477	1,232	-1,245	-50.3
Sep	1,408	636	-772	-54.8
Oct	1,175	615	-560	-47.7
Nov	929	524	-405	-43.6
Dec	1,078	1,084	6	0.6
Total	**13,263**	**9,870**	**-3,393**	**-25.6**

6.1.4 Captive Empty Export Container Traffic

Table 19 provides a comparative monthly summary of the captive empty export container traffic for the year CY2019 vs CY2020.

Table 19: Captive Empty Export Container Traffic - CY2019 v/s CY2020 (TEUs)

	CY2019	CY2020	Difference	% Change
Jan	7,601	6,083	-1,518	-20.0
Feb	9,501	10,283	782	8.3
Mar	7,547	2,366	-5,181	-68.7
Apr	9,146	5,220	-3,926	-42.9
May	9,144	14,840	5,696	62.3
Jun	5,660	5,277	-383	-6.8
Jul	5,700	3,867	-1,833	-32.2
Aug	3,637	3,567	-70	-1.9
Sep	6,903	5,607	-1,296	-18.8
Oct	6,216	5,904	-312	-5.0
Nov	5,489	6,011	522	9.5
Dec	3,377	7,081	3,704	109.7
Total	**79,921**	**76,106**	**-3815**	**-4.8**

Captive empty export container traffic contracted to the tune of 4.8% with 76,106 TEUs in CY2020 as compared to 79,921 TEUs in CY2019

6.2 Total Transhipment Inwards Container Traffic

The container shipping industry has not been the exception. The unprecedented disruption caused by Covid-19 pandemic has had an impact on the container transhipment volume as shipping lines rerouted their transhipment activities away from Port Louis to fewer ports in a bid to benefit from higher rebates.

Indeed, during the lockdown period, MSC's transhipment activities switched from Port Louis to Colombo, in particular, its Europe to Australia & Indian Ocean Islands Services.

Similarly, Maersk PROTEA service (with a VSA with CMA CGM MIDAS service) was diverted to Salalah owing to low volume of container traffic in South Africa. Apart from significant contractions recorded in March and April 2020, this segment witnessed negative growth for the fifth month in a row till October 2020. However, it is to be noted that a V shape recovery is expected as the last two months of 2020 experienced robust growth.

In fact, the Maersk Protea Service resumed its call at Port Louis again as from Nov 2020. Thereafter, the MSC Europe to Australia service was reinstated at Port Louis as from December 2020. Comparative monthly transhipment container traffic is summarised in Table 20.

Table 20: Total Transhipment Inwards Container Traffic - CY2019 v/s CY2020 (TEUs)

	CY2019	CY2020	Difference	% Change
Jan	13,284	14,608	1,324	10.0
Feb	15,779	16,283	504	3.2
Mar	16,700	15,331	-1,369	-8.2
Apr	15,609	8,237	-7,372	-47.2
May	15,289	8,883	-6,406	-41.9
Jun	15,537	10,049	-5,488	-35.3
Jul	14,355	12,960	-1,395	-9.7
Aug	18,651	23,635	4,984	26.7
Sep	15,610	21,139	5,529	35.4
Oct	15,324	20,415	5,091	33.2
Nov	21,741	19,360	-2,381	-11.0
Dec	14,985	21,442	6,457	43.1
Total	**192,864**	**192,342**	**-522**	**-0.3**

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 negative growth of 7.1% during the calendar year under review, equivalent to 9,787 TEUs.

Table 21: Transhipment Inwards Laden Container Traffic - CY2019 v/s CY2020 (TEUs)

	CY2019	CY2020	Difference	% Change
Jan	11,314	10,948	-366	-3.2
Feb	11,046	8,677	-2,369	-21.5
Mar	10,172	9,035	-1,137	-11.2
Apr	9,608	6,864	-2,744	-28.6
May	10,696	6,226	-4,470	-41.8
Jun	11,516	7,179	-4,337	-37.7
Jul	9,624	8,139	-1,485	-15.4
Aug	11,759	15,895	4,136	35.2
Sep	12,968	14,610	1,642	12.7
Oct	12,611	15,452	2,841	22.5
Nov	14,368	12,743	-1,625	-11.3
Dec	12,691	12,818	127	1.0
Total	**138,373**	**128,586**	**-9,787**	**-7.1**

6.2.2 Transhipment Inwards Empty Container Traffic (TEUs)

For the calendar year under review, empty transhipment container volume has soared up from 54,491 TEUs in CY2019 to 63,756 TEUs in CY2020 as detailed in Table 22.

Table 22: Transhipment Inwards Empty Container Traffic - CY2019 v/s CY2020 (TEUs)

	CY2019	CY2020	**Difference**	**% Change**
Jan	1,970	3,660	1,690	85.8
Feb	4,733	7,606	2,873	60.7
Mar	6,528	6,296	-232	-3.6
Apr	6,001	1,373	-4,628	-77.1
May	4,593	2,657	-1,936	-42.2
Jun	4,021	2,870	-1,151	-28.6
Jul	4,731	4,821	90	1.9
Aug	6,892	7,740	848	12.3
Sep	2,642	6,529	3,887	147.1
Oct	2,713	4,953	2,240	82.6
Nov	7,373	6,617	-756	-10.3
Dec	2,294	8,624	6,330	275.9
Total	**54,491**	**63,756**	**9,265**	**17.0**

6.3 Total Container Throughput for the port

Total Container Throughout, comprising Total Container Traffic + Total Transhipment Container Outwards+ paid restows for the period CY2020 stood at 640,475 TEUs versus 669,338 TEUs in CY2019, representing a decrease of 4.3%, equivalent to 28,863 TEUS as shown in Table 23:

Table 23: Total Container throughput – CY2019 v/s CY2020 (TEUs)

	CY2019	**CY2020**	**Difference**	**% Change**
Captive	276,147	245,736	-30,411	-11.0
Transhipment Inwards	192,864	192,342	-522	-0.3
Transhipment outwards	192,185	192,494	309	0.2
Paid restows	8,142	9,903	1,761	21.6
Total	**669,338**	**640,475**	**-28,863**	**-4.3**

7. PERFORMANCE INDICATORS AT MCT

7.1 Container Vessel Operated at MCT

Some 449 container vessels were operated at MCT for the CY2020 as compared to 537 in CY2019 as depicted in Table 24.

Table 24: Vessels serviced at MCT – CY2019 v/s CY2020

	CY2019	CY2020	Difference	% Change
Jan	43	32	-11	-25.5
Feb	35	44	9	25.7
Mar	47	27	-20	-42.6
Apr	46	31	-15	-32.6
May	50	35	-15	-30
Jun	47	34	-13	-27.7
Jul	48	36	-12	-25
Aug	49	42	-7	-14.3
Sep	45	40	-5	-11.1
Oct	44	41	-3	-6.8
Nov	44	46	2	4.5
Dec	39	41	2	5.1
Total	**537**	**449**	**-88**	**-16.4**

A shortfall of 88 vessels has been noted at MCT for the year under review. The breakdown of 449 vessels serviced at MCT in CY2020 by category is shown in the table below.

Vessel Category	Number of vessels
Ultra large container 14,501 & higher	4
New Panamax 10,001 to 14,500 TEUs	25
Post Panamax 5,101 to 10,000 TEUs	123
Panamax 3,001 to 5,001 TEUs	34
Feedermax 2,001 to 3,000 TEUs	145
Feeder 1,001 to 2,000 TEUs	94
Small Feeder up to 1,000 TEUs	24
Total	**449**

7.2 Container Throughput at MCT

The number of containers handled (including all restows, hatch covers, gear boxes) was 446,384 units in CY2020 compared to 490,742 units in CY2019, representing to a negative growth of 9.0%, equivalent to a drop of 44,358 units as depicted below in Table 24.

Similarly, container Throughput in terms of number of TEUs has gone down from 656,741 TEUS in CY2019 to 620,950 TEUS in CY2020, representing a contraction of 5.4% for the calendar year under review.

Likewise, the number of moves recorded in CY2020 was 460,427 compared to 507,268 in CY2019. This represents a decrease of 48,841 moves, representing a negative growth of 9.6%.

Table 25 provides the MCT operational indicators in terms of no. of containers/ TEUs/ Moves.

Table 25: No of Containers/TEUs/moves - CY2019 v/s CY2020

Month	Containers			TEUs			Moves		
	CY2019	CY2020	Difference	CY2019	CY2020	Difference	CY2019	CY2020	Difference
Jan	40,365	37,608	-2,757	53,890	50,305	-3,585	41,707	38,614	-3,093
Feb	40,620	44,500	3,880	53,627	61,654	8,027	41,833	45,795	3,962
Mar	42,805	27,711	-15,094	57,423	38,351	-18,712	44,172	28,740	-15,432
Apr	44,470	27,998	-16,472	58,207	40,010	-18,197	46,024	28,836	-17,188
May	41,129	30,696	-10,433	55,500	44,485	-11,015	42,763	31,676	-11,087
Jun	37,469	25,223	-12,246	50,521	35,078	-15,443	38,765	26,105	-12,660
Jul	37,810	29,784	-8,026	50,886	41,016	-9,870	39,081	30,779	-8,302
Aug	43,526	42,399	-1,127	58,932	60,146	1,214	45,090	43,658	-1,432
Sep	40,003	44,908	4,905	53,902	63,765	9,863	41,351	46,220	4,869
Oct	41,685	42,321	636	55,074	59,837	4,763	42,928	43,625	697
Nov	46,809	47,429	620	63,304	64,216	912	48,299	49,056	757
Dec	34,051	45,807	11,756	45,655	61,607	16,252	35,255	47,323	12,068
Total	**490,742**	**446,384**	**-44,358**	**656,741**	**620,950**	**-35,791**	**507,268**	**460,427**	**-48,841**
% change			**-9.0%**			**-5.4%**			**-9.6%**

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 – CY2019 v/s CY2020

	CY2019	CY2020
Avg. Moves Per Gross Crane Hour	22.0	21.6
Avg. Moves per Ship's Working Hour	37.7	37.2
Average Pre-berthing/ Sailing Delay (hrs)	1.7	2.6
Berth Occupancy (%)	75.5	78.3

- The average number of moves per gross crane hour has posted a decline from 22.0 in CY2019 to 21.6 in CY2020.
- Similarly, the average moves per ship's working hour stood at 37.2 in CY2020 as compared to 37.7 recorded in CY2019.
- The average pre-berthing delay per vessel stood at 2.6 hours in CY2020 as opposed to 1.7 hours posted in CY2019.
- The berth occupancy increased from 75.5% in CY2019 to 78.3% in CY2020.

7.4 Crane Productivity

Table 27 provides the comparative crane productivity for the CY2020 versus CY2019.

Table 27: Average Moves per Gross Crane Hours - CY2019 v/s CY2020

	CY2019	CY2020
Jan	19.4	20.7
Feb	20.4	22.6
Mar	21.1	25.0
Apr	24.2	22.4
May	23.8	25.5
Jun	24.9	24.0
Jul	23.0	21.4
Aug	22.1	19.9
Sep	23.1	20.2
Oct	21.1	19.6
Nov	20.9	21.5
Dec	21.2	21.2
Average	**22.0**	**21.6**

It is worth noting that the average crane productivity is still below the target set in the concession contract which stipulates that same shall not be less than 25 Moves per Gross Crane Hour.

7.5 Ship Productivity

Comparative monthly ship productivity for the CY2020 versus CY2019 is detailed in Table 28.

Table 28: Average Moves per Ship's Working Hours - CY2019 v/s CY2020

	CY2019	CY2020
Jan	31.7	36.5
Feb	35.7	33.9
Mar	37.3	45.1
Apr	42.5	34.4
May	41.4	42.5
Jun	47.0	43.1
Jul	39.8	38.6
Aug	36.3	37.3
Sep	44.7	37.0
Oct	38.0	34.4
Nov	31.5	38.5
Dec	34.2	34.1
Average	**37.7**	**37.2**

The ship productivity stood at 37.2 moves per ship working hour in CY2020 against 37.7 moves recorded for the CY2019.

7.6 Pre-berthing Delay

The pre-berthing delay is depicted in Table 29 for the CY2020 versus CY2019.

Table 29: Average Pre-Berthing Delay - CY2019 v/s CY2020 (hrs)

	CY2019	CY2020
Jan	2.0	2.0
Feb	1.9	1.8
Mar	1.8	1.8
Apr	1.8	1.9
May	1.3	2.3
Jun	1.5	3.0
Jul	1.7	2.8
Aug	1.5	2.8
Sep	1.7	3.0
Oct	1.8	3.1
Nov	1.5	3.0
Dec	1.8	2.5
Average	**1.7**	**2.6**

The average pre-berthing delay stood at 2.6 hrs in 2020 as opposed to 1.7 hrs recorded for the CY 2019.

7.7 Berth Occupancy @ MCT

The berth occupancy for MCT is shown in Table 30 for the calendar year 2020 compared to CY2019.

Table 30: Berth Occupancy at MCT - CY2019 v/s CY2020 (%)

	CY2019	CY2020
Jan	88.3	78.8
Feb	79.6	84.3
Mar	62.7	79.2
Apr	68.6	87.2
May	66.4	70.8
Jun	54.9	62.1
Jul	66	71.3
Aug	76.3	78.8
Sep	82.3	83.4
Oct	88.7	87
Nov	91	65.6
Dec	78.8	90.5
Average	**75.3**	**78.3**

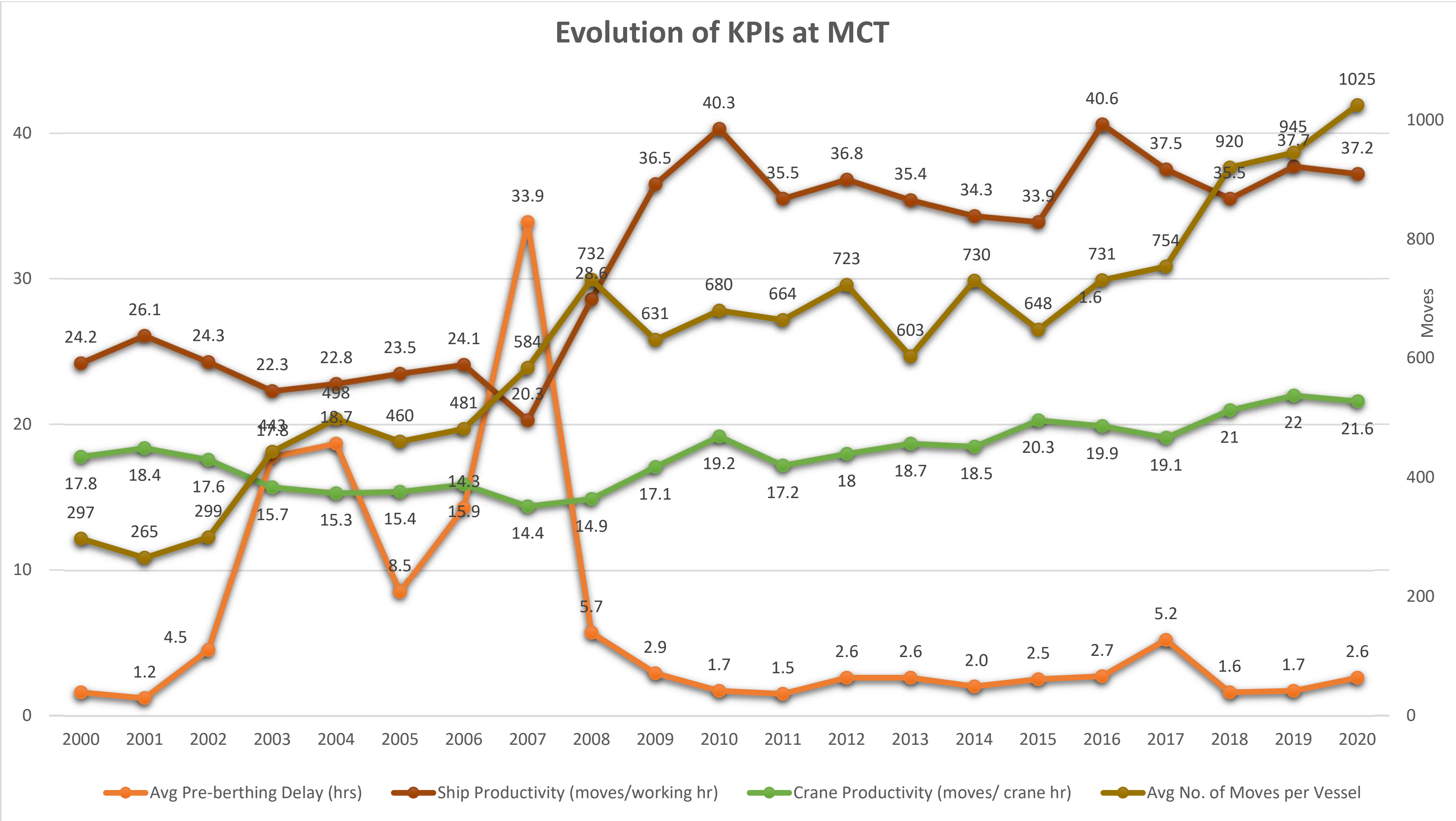


Figure 4: Evolution of KPIs at the Mauritius Container Terminal

8. VESSEL CALLS

Some 2,776 vessel calls were registered during the year CY2020 as compared to 3,536 calls in CY2019, i.e. a shortfall of 760 calls. Table 31 provides a summary of Total Vessel Traffic for the calendar year under review.

Table 31: Vessel calls for the year - CY2019 v/s CY2020

Category	CY2019	CY2020	Difference	% Change
Containerized Vessels	552	465	-87	-15.8
Tankers	108	98	-10	-9.3
Dry Bulk carriers	54	49	-5	-9.3
Unitized & Break Bulk Carriers	1	1	0	0
General Cargo (incl. cattle carriers)	22	24	2	9.1
Fishing Vessels	1,137	765	-372	-32.7
Pure Car Carriers	28	25	-3	-10.7
Inter-Island	54	49	-5	-9.3
Cruise Vessels	38	20	-18	-47.3
Others	1,542	1,280	-262	-17.0
Total	**3,536**	**2,776**	**-760**	**-21.5**

- Containerised vessel calls registered a decrease of 15.8%, with 465 calls in CY2020 as opposed to 552 calls in CY2019.

- No of calls by tankers was 98 in CY2020 as opposed to 108 recorded during the CY2019, registering a decline of 9.3%. This is mainly attributed contraction recorded for LPG and white Oil tankers.

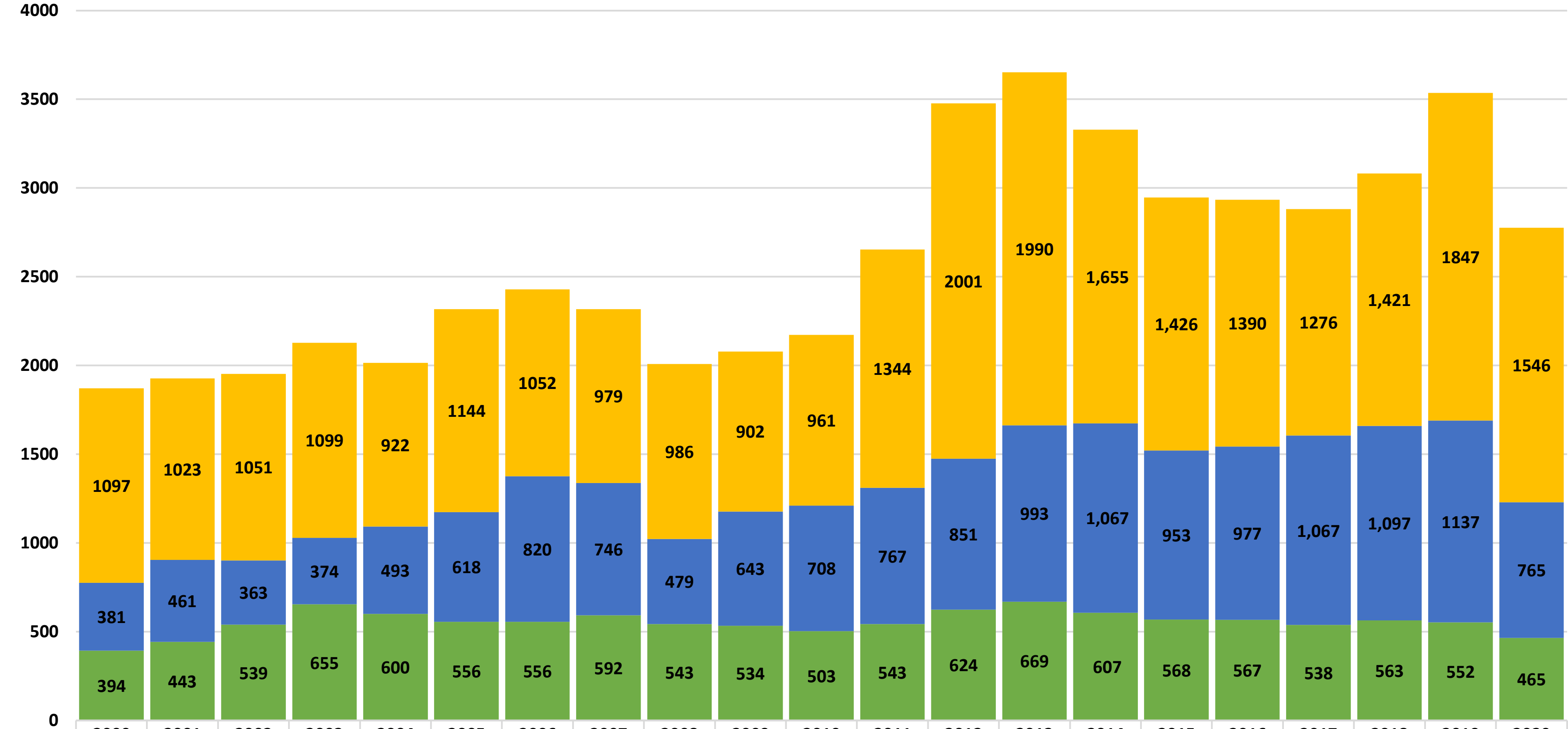
- No. of calls made by Dry Bulk carriers was 49 in CY2020 as compared to 54 in CY2019, registering a decline of 9.3%

- Fishing vessel calls contracted by 32.7% from 1,137 calls in CY2019 to 765 calls in CY2020.

- For the inter-island trade, total number of calls decreased from 54 in CY2019 to 49 in CY2020.

  Figure 5 shows the evolution of total vessel traffic from 2000 to 2020

Total Vessel Traffic 2000-2020



	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Others	1097	1023	1051	1099	922	1144	1052	979	986	902	961	1344	2001	1990	1,655	1,426	1390	1276	1,421	1847	1546
Fishing	381	461	363	374	493	618	820	746	479	643	708	767	851	993	1,067	953	977	1,067	1,097	1137	765
Containerised	394	443	539	655	600	556	556	592	543	534	503	543	624	669	607	568	567	538	563	552	465

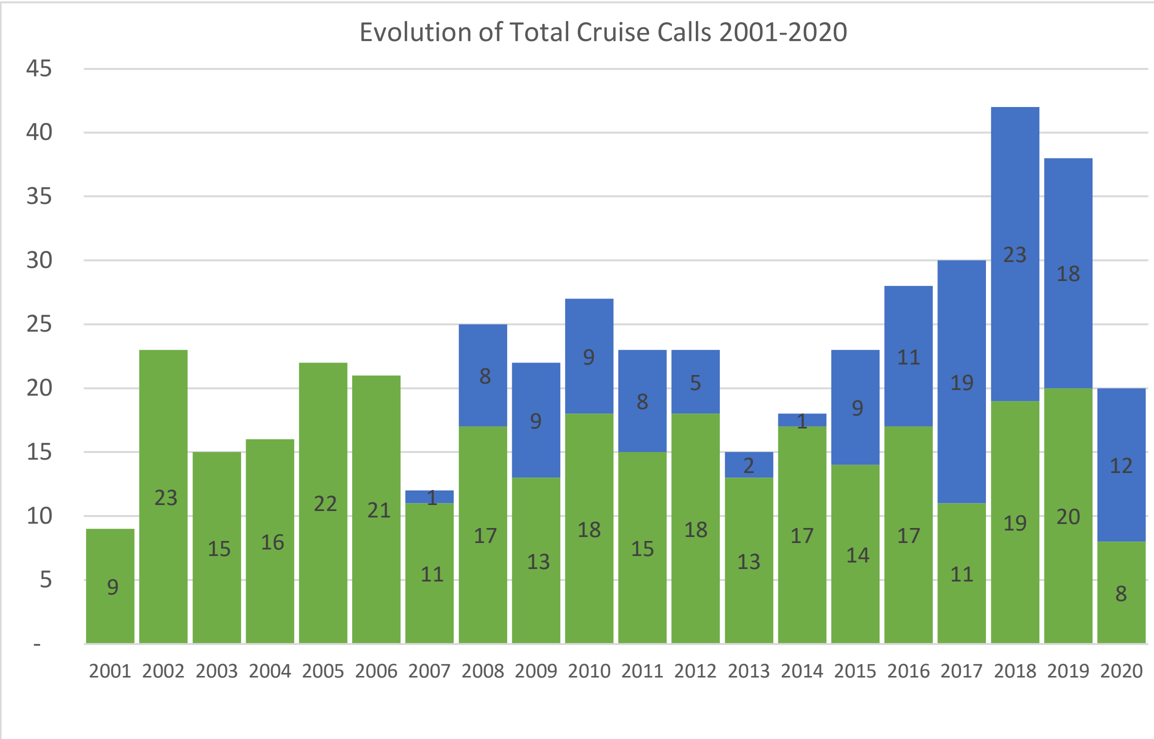
8.1 Cruise Tourism

Cruise Vessel Calls

During the calendar year 2020, the number of cruise calls stood at 20 against 38 in CY2019, representing a decrease of 47.4%. It should be noted that with the prevalence of Covid 19 pandemic, cruise ship calls which were cancelled since 13 Mar 2020 did not resume at all in CY2020.

Out of the 20 calls recorded in CY2020, the number of Homeporting (HP) and Round the World Cruises (RTW) calls accounted to 12 and 8 respectively.

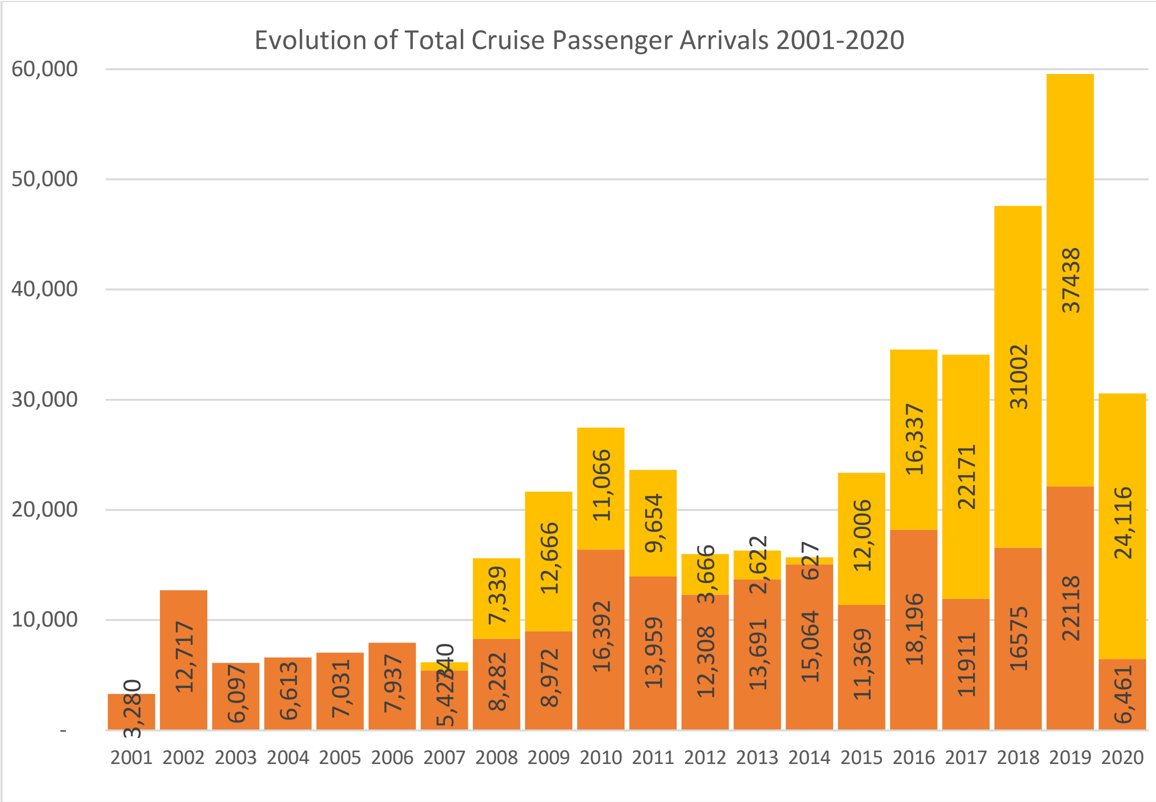
Figure 6 depicts the evolution of number of calls made by homeporting and Round the World cruises from 2001-2020



Cruise Passengers Arrivals

Similarly, cruise passenger arrivals contracted by 48.7% from 59,556 in CY2019 to 30,577 passengers in CY2020. It is to be noted that cruise segment remains the most affected by the Covid-19 contagion.

Figure 7 depicts the evolution of number of passengers both in homeporting (HP) and Round the World cruises (RTW) from 2001-2020



Details of passengers arriving on Homeporting and Round The World Cruises vessels are provided in the table 32.

Table 32

	Total Cruise Passengers				Total Cruise Calls			
	CY2019	CY2020	Difference	% Change	CY2019	CY2020	Difference	% Change
HMP	37,438	24,116	-13,322	-35.6	18	12	-6	-33.3
RTWC	22,118	6,461	-15,657	-70.8	20	8	-12	-60
TOTAL	**59,556**	**30,577**	**-28,979**	**-48.7**	**38**	**20**	**-18**	**-47.4**

8.2 Calls at Outer Harbour

The number of vessel calling Outer Harbour registered a decrease from 1,542 vessel calls for the year CY2019 to 1,280 calls during the CY2020.

The table below shows the breakdown of the vessels calling at the outer harbour for activities such as bunkering purposes, crew change, repairs and inspection of cargo or vessel hull conditions, embarking/disembarking of armed (security) guards, provision of fresh water supply and ship chandling, amongst others.

Table 33: Total Calls Outer Harbour - CY2019 v/s CY2020

	CY2019	CY2020	Difference	% Change
Bunkering Only	906	803	-103	-11.4
Change Crew	299	120	-179	-59.8
Change of Security Guard	50	5	-45	-90
Ship Stores	115	128	13	11.3
Repairs or Inspection	114	99	-15	-13.2
Others	58	125	67	115.5
Total	**1542**	**1280**	**-262**	**-17.0**

A negative growth to the tune of 17.0% has been noted for the calendar year under review. With the exception of ship stores and others, there were decreases recorded for items such as bunkering only (-11.4%), change crew (-59.8%), change of security guard (-90%), repairs or inspection (-13.2%) owing to the sanitary measures imposed in order to contain the Covid-19 pandemic as well as the downturn of global and regional trade.

9. PERFORMANCE AT MULTI PURPOSE TERMINAL

9.1 Key Performance Indicators

Table 34: Key Performance Indicators at MPT - CY2019 v/s CY2020

	CY2019	CY2020
No. of Vessel Calls	14	18
No. of Containers	2,041	6,512
Avg. Moves /Gross Gang hr	4.0	4.0

- During CY2020, some 18 container vessel calls were registered at the MPT and some 6,512 TEUs were handled in comparison with 14 container vessels and 2,041 TEUs respectively in CY2019 as most container ships are being serviced at MCT.
- In CY2020, the average productivity remained at par with 4.0 moves/gross gang hour in both CY2019 and CY2020.

9.2 Inter-Island Trade

Vessels plying between the dependencies of Mauritius (Rodrigues and Agalega) made 49 calls and handled some 12,813 TEUs in CY2020 as depicted in the Table 35.

Table 35: Intra trade traffic of Mauritius– CY2019 v/s FY 18/2020

	CY2019	CY2020
Total No. of Voyages	**54**	**49**
Breakdown of the total No. of voyages		
Anna	*3*	*-*
Black Rhino	*32*	*34*
Mauritius Trochetia	*19*	*15*
Total No. of Containers	**11,688**	**12,813**
Breakdown of the total no of containers		
Anna	*755*	
Black Rhino	*9,635*	*11,406*
Mauritius Trochetia	*1,298*	*1,407*

It is worth noting that with the ongoing infrastructural developments in Agalega, the number of calls to Agalega has increased from 14 in CY2019 to 16 in CY2020.

9.3 Berth Occupancy @ MPT

Comparative Berth Occupancy for CY2020 versus CY2019 of the various berths at Terminal I and II are depicted in Table 36.

Table 36: Berth Occupancy at MPT - CY2019 v/s CY2020 (%)

Berth		**CY2019**	**CY2020**
		Total Occupied	Total Occupied
Quay No. 1	Terminal II	66.9	56.6
Quay No. 2		83.1	67.7
Quay No. 3		70.6	54.5
Quay No. 4		84.6	71.2
Quay A	Terminal I	94.1	77.0
Quay D		81.0	68.8
Quay E		77.8	62.3
Bulk Sugar Terminal		11.3	5.8
Trou Fanfaron Fishing Quay 1		98.9	98.7
Trou Fanfaron Fishing Quay 2		99.3	98.5
Cruise Jetty		16.1	11.9
Oil Jetty		27.8	24.4
FDM		97.3	95.2
MFD		83.6	56.0

Owing to the prevalence of Covid 19 pandemic, all quays have witnessed a decline in their total berth occupancy rates for the calendar year under review as lesser vessels called at Port Louis.

10. CONTAINER TRAFFIC BY SHIPPING LINES

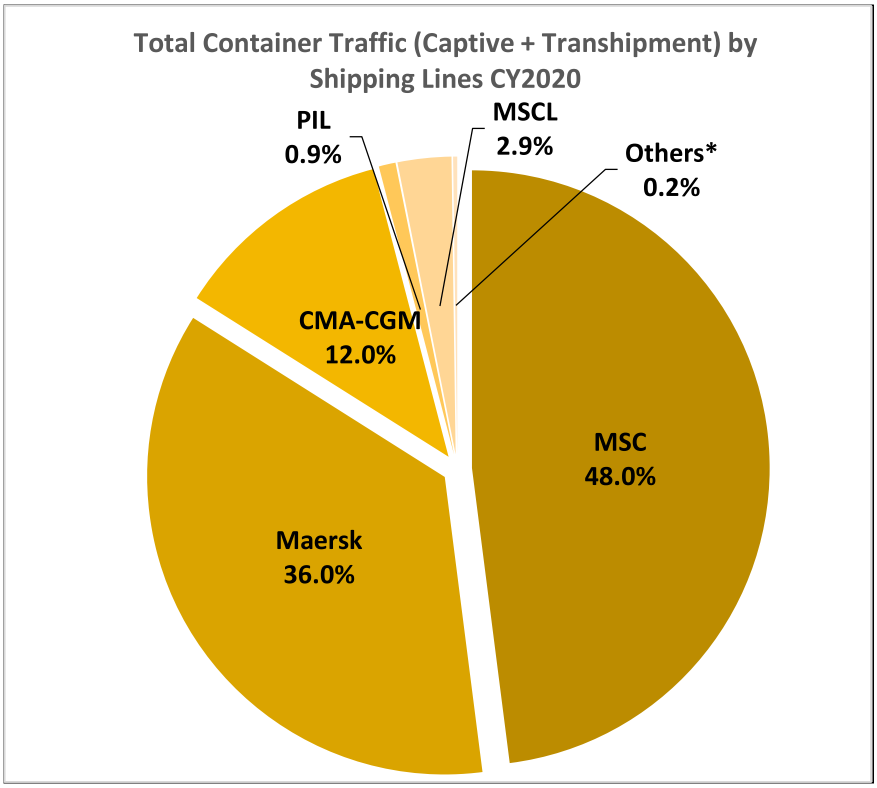
10.1 Total Container Traffic by Shipping lines – TEUs

Table 37

Shipping Line	CY2019	% Share	CY2020	% Share	Difference	% Change in Volume
MSC	235,894	50.3	210,164	48.0	-25,730	-10.9
Maersk	148,046	31.6	157,660	36.0	9,614	6.5
CMA CGM	57,438	12.2	52,487	12.0	-4,951	-8.6
PIL	13,893	3.0	4,005	0.9	-9,888	-71.1
Mauritius Shipping Corporation Ltd. (MSCL)	11,968	2.6	12,813	2.9	845	7.1
Others *	1,772	0.4	949	0.2	-823	-46.4
Total	**469,011**	**100**	**438,078**	**100**	**-30,933**	**-6.6**

* Others include: Hapag Lloyd and others

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



- MSC's share decreased from 50.3 % to 48.0%. Its share of total container traffic volume has decreased by 10.9% from 235,894 TEUs in CY2019 to 210,164 TEUs in CY2020.

- Maersk's share in CY2020 stood at 36.0 % higher than the previous year, i.e. 31.6%. An increase of 6.5% has been noted in their volume for the calendar year under review.

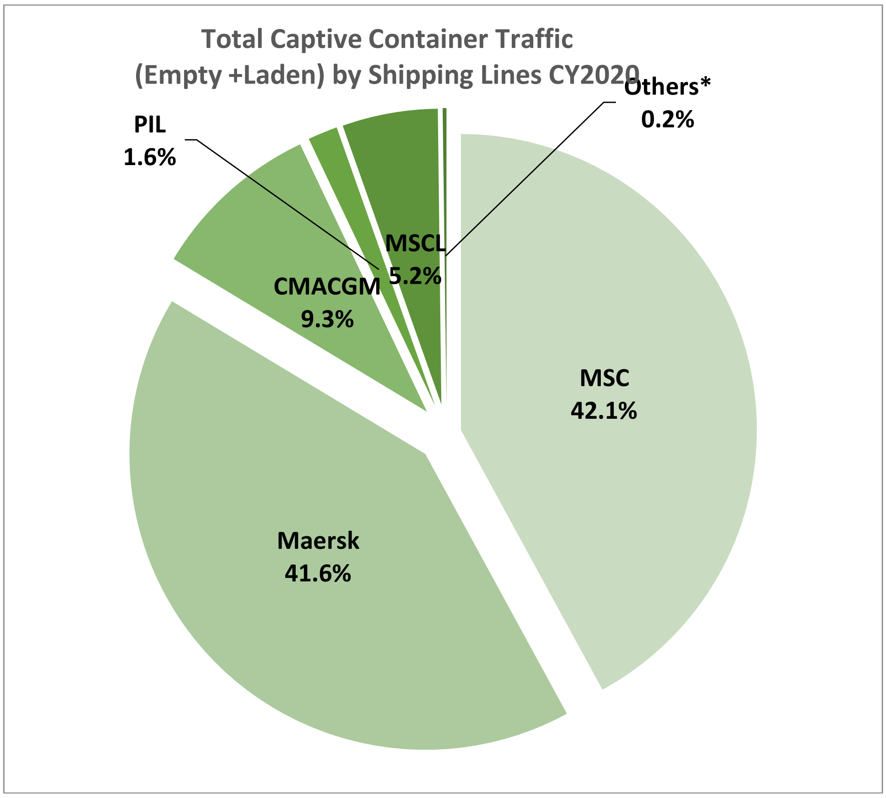
- CMA CGM's share in total container traffic has remained practically the same, i.e. around 12% and a contraction of 8.6% has been noted in its volume.

10.2. Total Captive Container Traffic by Shipping Lines – TEUs

Table 38

Shipping Line	CY2019	CY2020	Difference	% Change
MSC	102,755	103,350	595	0.6
Maersk	119,504	102,174	-17,330	-14.5
CMA CGM	26,387	22,906	-3,481	-13.2
PIL	13,828	4,005	-9,823	-71.0
MSCL	11,968	12,813	845	7.1
Others *	1,705	488	-1,217	-71.4
Total	**276,147**	**245,736**	**-30,411**	**-11.0**

* Others include: Hapag Lloyd and others



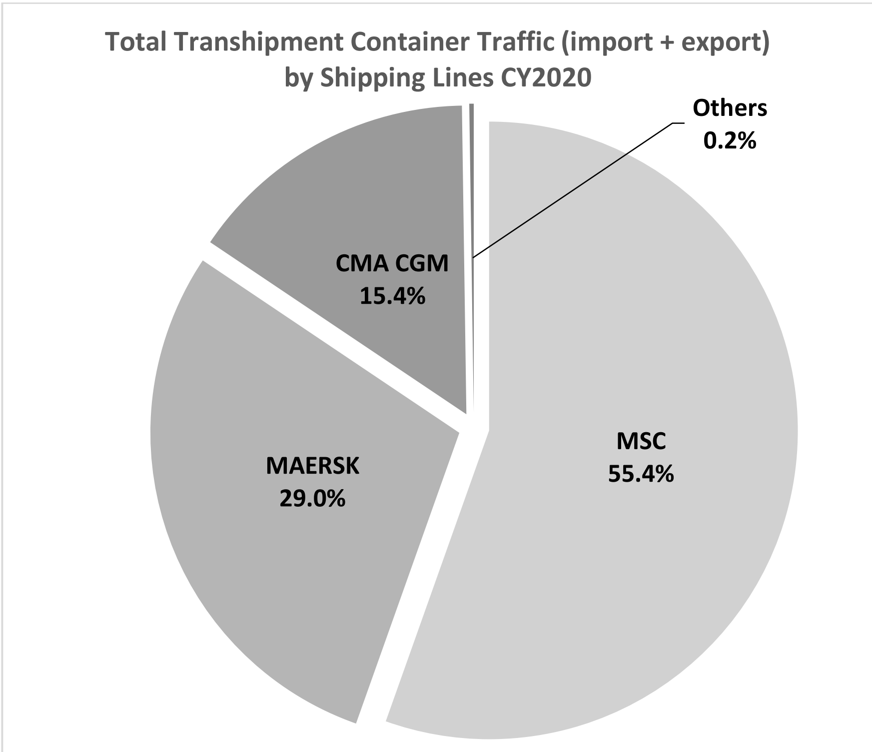
Total captive container traffic decreased by 11.0% from 276,147 TEUs in CY2019 to 245,736 TEUs in CY2020. Maersk, CMA CGM, PIL, MSCL and others have witnessed contractions whilst MSC and MSCL captive segments have registered expansions for the calendar year under review.

10.3 Total Transhipment Traffic by Shipping Lines - TEUs

Table 39

Shipping Line	CY2019	CY2020	Difference	% Change
MSC	133,139	106,814	-26,325	-19.8
Maersk	28,542	55,486	26,944	94.4
CMA CGM	31,051	29,581	-1,470	-4.7
Others*	132	461	329	249.2
Total	**192,864**	**192,342**	**-522**	-0.3

* Others include PIL, MSCL. Hapag Lyoyd and others



Total transhipment container traffic has noted a slight decrease to the tune of 0.3% for the calendar year under review.

It is worth noting that MSC and CMA CGM have noted a negative growth of 19.8% and 4.7% respectively whilst Maersk and others transhipment traffic have noted a growth of 94.4% and 249.2% respectively.

11. MARKET SHARE BY MAJOR SHIPPING LINES

Table 40 shows the change in market share in different segments.

Table 40: Comparative Traffic Share in Container Traffic - CY2019 v/s CY2020

	Share CY2019	Share CY2020
MSC		
Total Container Traffic	50.3	48.0
Total Captive Container Traffic	37.2	42.1
Total Transhipment Container Traffic	69.0	55.4
Maersk		
Total Container Traffic	31.6	36.0
Total Captive Container Traffic	43.2	41.6
Total Transhipment Container Traffic	14.8	30.0

In CY2020, the local market was shared as follows:

- Total Container Traffic: MSC held 48.0% of the market share followed by Maersk with a share of 36.0% in CY2020
- Total Captive Container Traffic: MSC's with a market share of 42.1% was almost at par with Maersk's share of 41.6% in CY2020
- Total Transhipment Container Traffic: MSC which holds the lion share, has noted a slight decrease from 69.0% in CY2019 to 55.4% in CY2020. Conversely, Maersk's market share has more than doubled from 14.8% to 30.0%.

12 TRANSHIPMENT ACTIVITIES BY SHIPPING LINES

12.1 Mediterranean Shipping Company Ltd (MSC)

Table 41: MSC Transhipment Inwards (TEUs)

	CY2019	CY2020	Difference	% change
Laden	105,629	68,937	-36,692	-34.7
Empty	27,510	37,877	10,367	37.7
Total	**133,139**	**106,814**	**-26,325**	**-19.8**

Some 106,814 TEUs were transhipped by MSC during the current year as compared to 133,139 TEUs in CY2019, i.e. a negative growth of 19.8%.

12.2 Maersk Line

Table 42: Maersk Transhipment Inwards (TEUs)

	CY2019	CY2020	Difference	% change
Laden	23,014	45,185	22,171	96.3
Empty	5,528	10,301	4,773	86.3
Total	**28,542**	**55,486**	**26,944**	**94.4**

The number of TEUs transhipped by Maersk Shipping Line almost doubled with an impressive growth to the tune of 94.4%, from 28,542 TEUs in CY2019 to 55,486 TEUs in CY2020.

12.3 CMA-CGM

Table 43: CMA-CGM Transhipment Inwards (TEUs)

	CY2019	CY2020	Difference	% change
Laden	9,598	14,464	4,866	50.7
Empty	21,453	15,117	-6,336	-29.5
Total	**31,051**	**29,581**	**-1,470**	**-4.7**

The number of TEUs transhipped by CMA CGM increased from 31,051 TEUs in CY2019 to 29,581 TEUs in CY2020.

13. DOWNTIME AT PORT

During the calendar year under review, handling operations were disrupted at the port for about 28.9 days in CY2020 compared to 33.3 days registered in CY2019 owing to adverse weather conditions.

14. SHIPPING SERVICES CY2020

Container Liners

SHIPPING LINES	FREQUENCY	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. Weekly	Australia Express Service (SB) - slot chartering by DAL - suspended from May to Dec 2020 a/c COVID 19	London Gateway, Antwerp, Le Havre, Fos Sur Mer, La Spezia, Naples, Gioia Tauro, Reunion Island, **Port Louis**, Sydney, Melbourne, Adelaide, Fremantle, Singapore, Colombo, King Abdullah, Suez Canal (European Ports)
	2. Weekly	Africa Express Service (EB)	Durban, **Port Louis,** Colombo, Singapore, Chinese Ports
	3. Weekly	Ingwe Service (SB)	Qingdao, Shanghai, Ningbo, Shekou, Singapore, Colombo, **Port Louis,** Durban, Coega, Durban, Abu Dhabi, Jebel Ali, Karachi-Muhammad bin Qasim, Mundra, Nhava Sheva, Hazira/ Surat, Colombo, Singapore, Qingdao
	4. Weekly 5. Fortnightly 6. Fortnightly	Indian Ocean Islands Relay services: **Loop 1** Indian Ocean Islands Relay services: **Loop 2** Sofala Service	**Port Louis,** Réunion, Tamatave, **Port Louis** **Port Louis,** Longoni, Majunga, Diego Suarez, **Port Louis** **Port Louis,** Beira, **Port Louis**
2. Maersk (Mauritius) Ltd. MFD Building Freeport Zone 5 Mer Rouge Port Louis Tel. : (230) 206 2200 Fax : (230) 206 2210	1. Weekly	M Express (VSA CMA-CGM MOZEX, Mozambique to Far East Service)	Réunion, Toamasina, Maputo, Beira, Nacala, **Port Louis,** Singapore, Tanjung Pelepas
	2. Weekly	Safari WB (slot chartering by CMA CGM)	Hong Kong, Shekou, Tanjung Pelepas, **Port Louis,** Durban, Port Elizabeth, Tanjung Pelepas, Hong Kong, Shanghai, Kobe, Nagoya, Yokohama, Ningbo, Shanghai.

SHIPPING LINES	FREQUENCY	SERVICE	MAIN PORTS OF CALL
	3. Weekly	Protea Service - VSA CMA-CGM MIDAS service - slot chartering by DAL/ UAFL - suspended from May to Nov 2020 a/c COVID 19	Durban, Reunion, **Port Louis,** Khor Fakkan, Jebel Ali, Mundra, Jawaharlal Nehru.
	4. Weekly	IOI Service (slot chartering by DAL/ UAFL)	Salalah, Réunion, **Port Louis**, Toamasina, Port Victoria.
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. Weekly	Europe to Australia Service (VSA with MSC Australia Express Service)	London Gateway, Antwerp, Le Havre, Fos Sur Mer, La Spezia, Naples, Gioia Tauro, Reunion, **Port Louis**, Sydney, Melbourne, Adelaide, Fremantle, Singapore, Colombo, King Abdullah, Suez Canal to European Ports
	2. Weekly	Protea/ Midas Service Service (slot chartering with Maersk Line)	Durban, Reunion, **Port Louis**, Khor Al Fakkan, Jebel Ali, Mundra, Nhava Sheva
	3. Weekly	M-Express/ Mozex Service (slot chartering with Maersk Line)	Réunion, Toamasina, Maputo, Beira, Nacala, **Port Louis,** Singapore, Tanjung Pelepas
	4. Weekly	Indian Ocean Islands Feeder 2	Réunion, **Port Louis,** Tamatave
	5. Every 3 weeks	Indian Ocean Islands Feeder 1/ 5	**Port Louis**, Longoni, Majunga, Diego Suarez, Réunion **/ Port Louis,** Tuléar, Ehoala

SHIPPING LINES	FREQUENCY	SERVICE	MAIN PORTS OF CALL
4. Pacific International Lines Ltd. Agent: Pacific World Shipping Ltd. Level 3, Happy World House 37, Sir William Newton St. Port Louis Tel: (230) 271 1200 Fax: (230) 213 9696	Weekly	MZX Mozambique Zuid Express Service	Singapore, **Port Louis,** Point des Galets, Tamatave, Maputo, Beira, Singapore
5. UAFL/ DAL Agent: Scott Shipping International Ltd Ground Floor, IKS House Marine Road Port Louis Tel: (230) 216 3042 Fax: (230) 216 0045	Weekly	Slot Chartering with a. Maersk IOI b. Maersk M-Express Services c. MSC Australia Express Service (SB)	 Port Elizabeth, Durban, **Port Louis,** Jebel Ali, Mundra, JNPT, Durban, Port Elizabeth Salalah, Reunion, **Port Louis**, Toamasina, Port Victoria, Salalah London Gateway, Antwerp, Le Havre, Fos Sur Mer, La Spezia, Naples, Gioia Tauro, Port Louis, Sydney, Melbourne, Adelaide, Fremantle
6. Mauritius Shipping Corporation Ltd 1, Capitainerie Building, Quay D Port Louis Tel: (230) 217 2285 Fax: (230) 242 5245	Every 10 days Upon request	M.V Black Rhino/ M.V Mauritius Trochetia M.V Mauritius Trochetia	Port Louis, Rodrigues, Port Louis Agalega

Pure Car Carrier Services

SHIPPING LINES	FREQUENCY	MAIN PORTS OF CALL
7. Hoegh Auto Liners Agent: Southern Marine & Co. Ltd 3rd Floor, Capitainerie Building Quay D Port Louis Tel: (230) 216 0272 Fax: (230) 216 1020	Monthly	European ports, South African ports, Tamatave, Reunion, **Port Louis,** Australia ports
8. Mitsui Pure Car Carrier Agent: Blyth Brothers & Co. Ltd. 8, Dr. Ferriere St. Port Louis Tel: (230) 212 5134 Fax: (230) 208 0879	Monthly	Japan, Singapore, India, **Port Louis,** Réunion, Madagascar, East Africa – slot chartering with K Line, represented by Scott Shipping International Ltd.

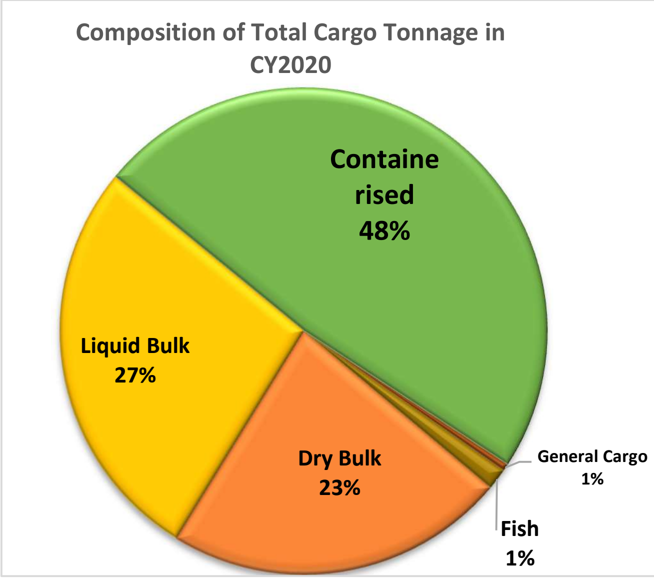
APPENDIX 1: COMPOSITION OF TOTAL CARGO TRAFFIC CY2020

A. Total Cargo

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

Total Cargo Traffic (Dry Bulk, Liquid Bulk, Containerised Cargo and General Cargo) handled in the Port contracted by 13.0% from 8,517,345 tonnes in CY2019 to reach 7,421,764 tonnes in CY2020.

Cargo (Bagged + Maize+ Coal + Fertilizer +Soya Bean Meal + Urea + Break Bulk + Inter-Island + Fish + Containerised) handled by CHCL amounted to 4,067,058 tonnes, equivalent to 54.9% of Total Cargo Traffic.



B. Total Bulk Cargo

Total Bulk cargo (Dry & Liquid) tumbled from 4,310, 228 tonnes in CY2019 to 3,702,043 tonnes in CY2020, representing a negative growth of 14.1%.

Total Bulk Cargo CY2019 v/s CY2020 (tonnes)

	CY2019	CY2020	Difference	% Change
Dry Bulk	1,891,273	1,678,469	-212,804	-11.3
Liquid Bulk	2,418,955	2,023,574	-395,381	-16.3
Total	**4,310,228**	**3,702,043**	**-608,185**	**-14.1**

B.1 Dry Bulk Cargo

Total Dry Bulk cargo registered a decline of 11.2%, equivalent to 212,804 tonnes from 1,891,273 tonnes in CY2019 to 1,678,469 tonnes in CY2020.

Total Dry Bulk Cargo CY2019 v/s CY2020 (tonnes)

	CY2019	CY2020	Difference	% Change
Imports	1,888,320	1,677,469	-210,851	-11.2
Exports	2,953	1,000	-1,953	-66.1
Total	**1,891,273**	**1,678,469**	**-212,804**	**-11.2**

B.2 Liquid Bulk Cargo

Total Liquid Bulk tumbled from 2,418,955 tonnes in CY2019 to 2,023,574 tonnes in CY2020, registering a negative growth of 16.3%, equivalent to 395,381 tonnes.

Total Liquid Bulk Cargo CY2019 v/s CY2020 (tonnes)

	CY2019	CY2020	Difference	% Change
Imports	1,717,989	1,370,038	-347,951	-20.3
Exports	700,966	653,536	-47,430	-6.8
Total	**2,418,955**	**2,023,574**	**-395,381**	**-16.3**

C. Containerised Cargo

Total Containerised Cargo declined by 10.3% from 3,990,413 tonnes in CY2019 to 3,579,898 tonnes in CY2020, as summarised below.

Containerised Cargo Traffic CY2019 v/s CY2020 (tonnes)

	CY2019	CY2020	Difference	% Change
Imports	1,599,417	1,370,265	-229,152	-14.3
Exports	687,627	626,740	-60,887	-8.8
Transhipment (inwards)	1,703,369	1,582,893	-120,476	-7.1
Total	**3,990,413**	**3,579,898**	**-410,518**	**-10.3**

D. General Cargo Traffic

General Cargo, comprising transhipment inwards, inter-island, bagged cargo and unitised break bulk, witnessed a decline of 35.9% (equivalent to 19,177 tonnes) from 53,363 tonnes in CY2019 to 34,186 tonnes in CY2020.

General Cargo Traffic CY2019 v/s CY2020 (tonnes)

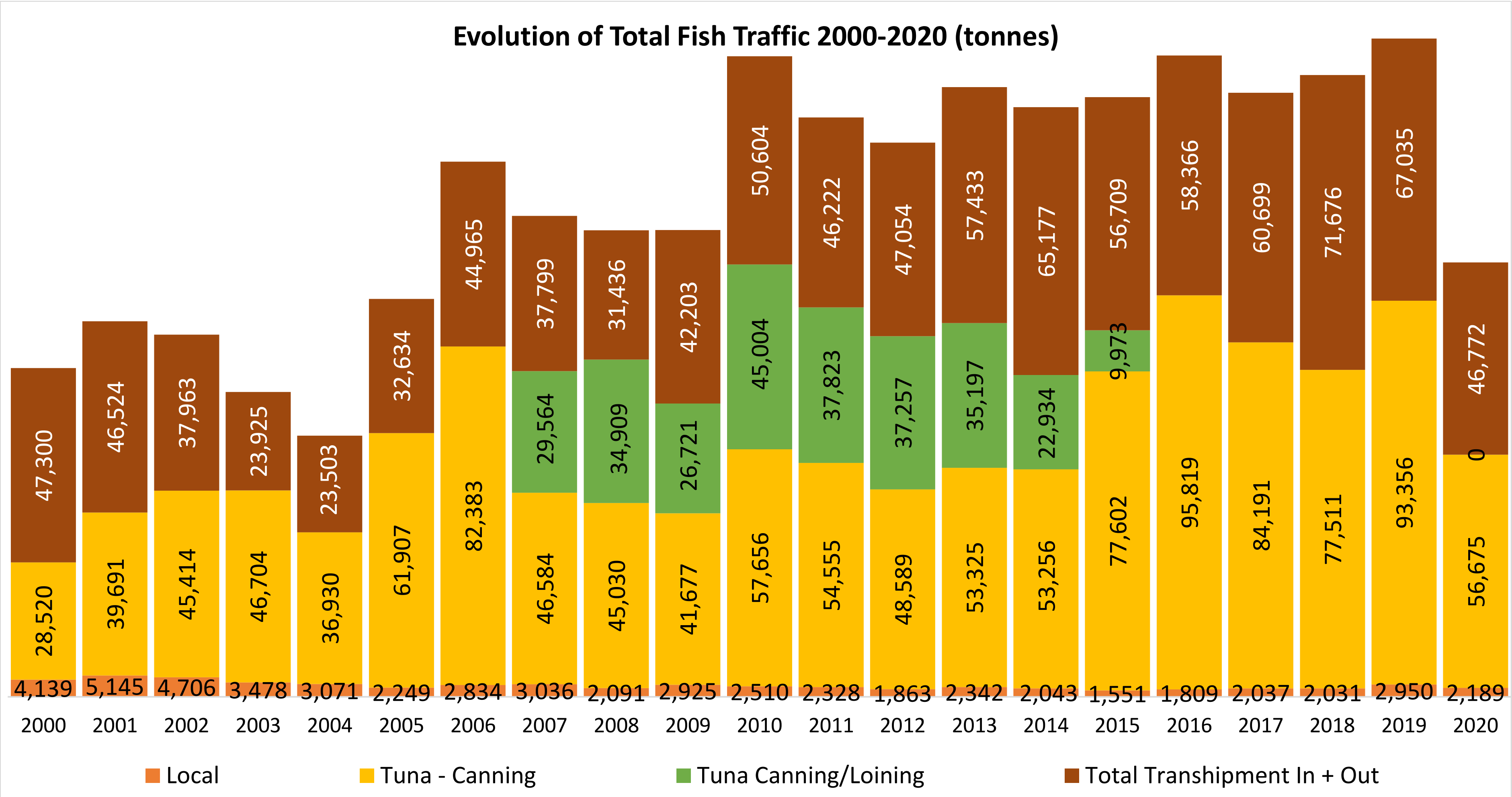
	CY2019	CY2020	Difference	% Change
Imports	38,795	24,278	-14,517	-37.4
Exports	14,568	9,908	-4,660	-32.0
Total	**53,363**	**34,186**	**-19,177**	**-35.9**

E. Fish Traffic

Total Fish Traffic contracted by 35.3% from 163,341 tonnes in CY2019 to 105,636 tonnes in CY2020.

Total Fish Traffic CY2019 v/s CY2020 (tonnes)

	CY2019	CY2020	Difference	% Change
Tuna Processing	93,356	56,675	-36,681	-39.3
Local Market	2,950	2,189	-761	-25.8
Transhipment Inwards	50,995	45,702	-5,293	-10.4
Direct Transhipment Inwards (ship to ship)	8,020	535	-7,485	-93.3
Direct Transhipment Outwards (ship to ship)	8,020	535	-7,485	-93.3
Grand Total	**163,341**	**105,636**	**-57,705**	**-35.3**


Evolution of Total Fish Traffic 2000-2020 (tonnes)
2000 2001 2002 2003 2004 2005 2006 2007 2008 2009 2010 2011 2012 2013 2014 2015 2016 2017 2018 2019 2020
4,139 5,145 4,706 3,478 3,071 2,249 2,834 3,036 2,091 2,925 2,510 2,328 1,863 2,342 2,043 1,551 1,809 2,037 2,031 2,950 2,189
28,520 39,691 45,414 46,704 36,930 61,907 82,383 46,584 45,030 41,677 57,656 54,555 48,589 53,325 53,256 77,602 95,819 84,191 77,511 93,356 56,675
29,564 34,909 26,721 45,004 37,823 37,257 35,197 22,934 9,973 0
47,300 46,524 37,963 23,925 23,503 32,634 44,965 37,799 31,436 42,203 50,604 46,222 47,054 57,433 65,177 56,709 58,366 60,699 71,676 67,035 46,772
Local
Tuna - Canning
Tuna Canning/Loining
Total Transhipment In + Out

20.04.2021
/bb