

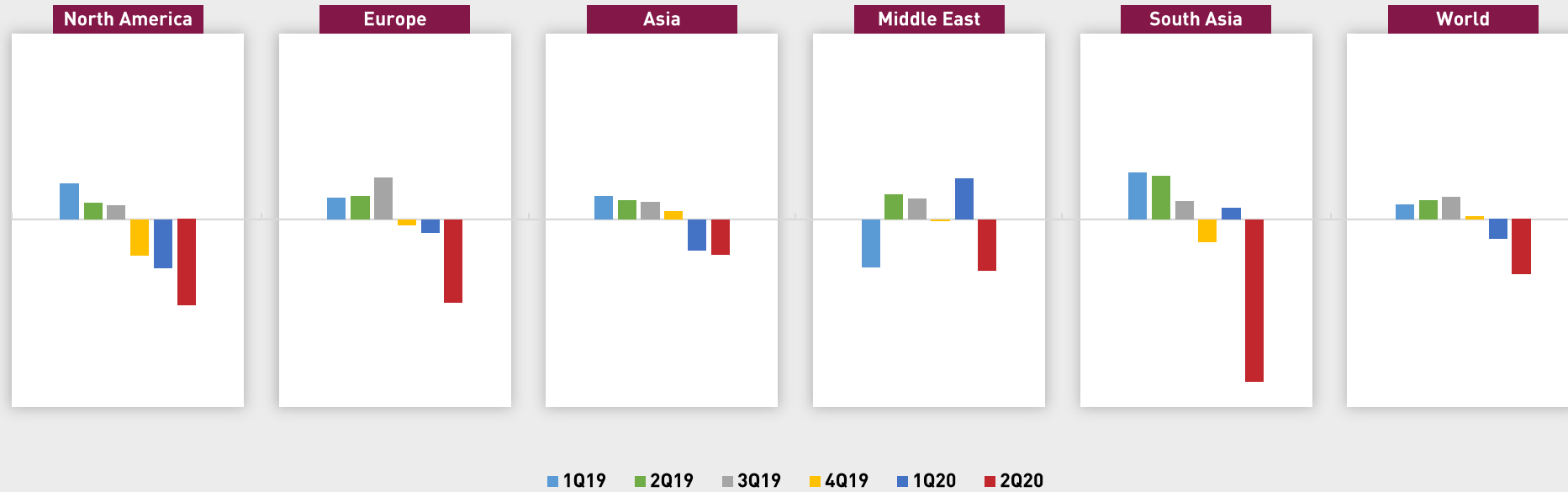
Coronavirus Impact on Container Trade



CONTAINERS
INDIA 2020

TOMORROW IS HERE

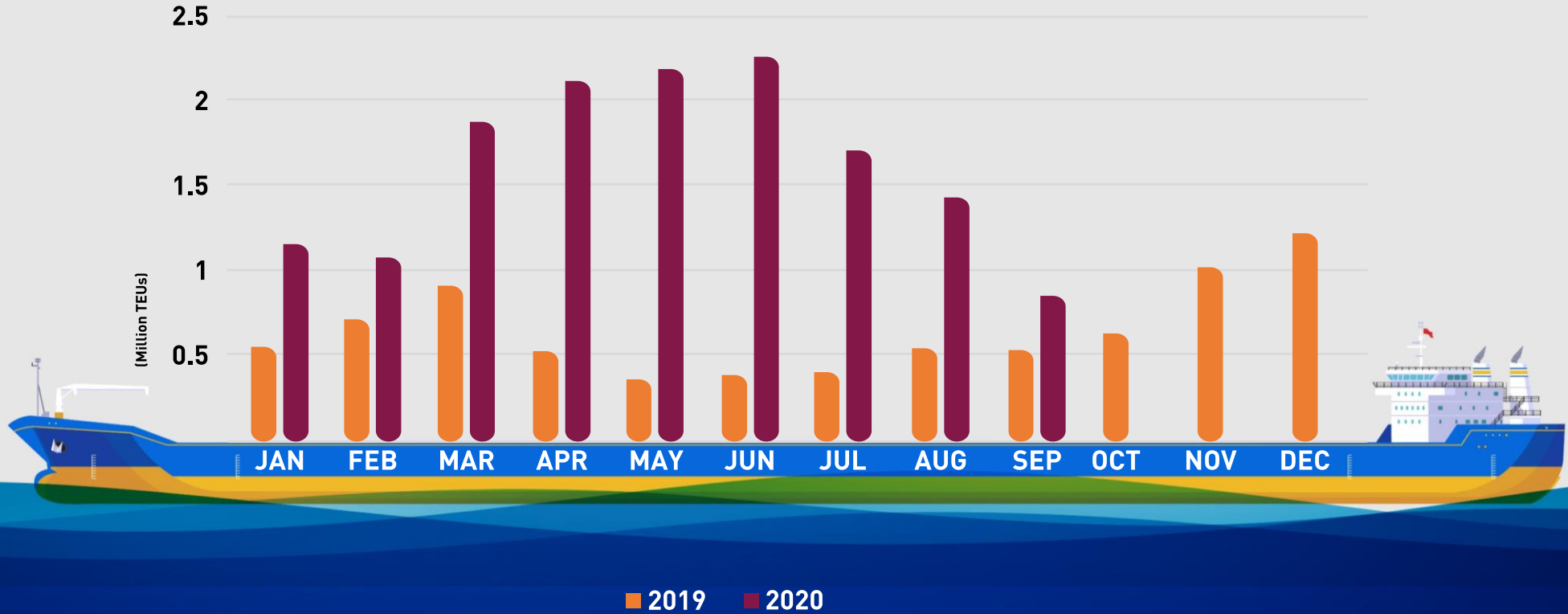
Year-on-year Container Throughput Growth in Major Regions of the World



- Estimated worldwide container port throughput in the second quarter decreased by 8.2% year-on-year.
- This is a lower decline than previously envisaged and stands below the average fall in GDP across the advanced economies.
- The relationship between GDP and container trade activity has been on a diminishing and inconsistent trend in recent years
- Port activity in South Asia collapsed by over 24% between April and June and mirrored India's fall in GDP during this period.
- South Asia's crash in 2Q volume was the highest among all other regions.

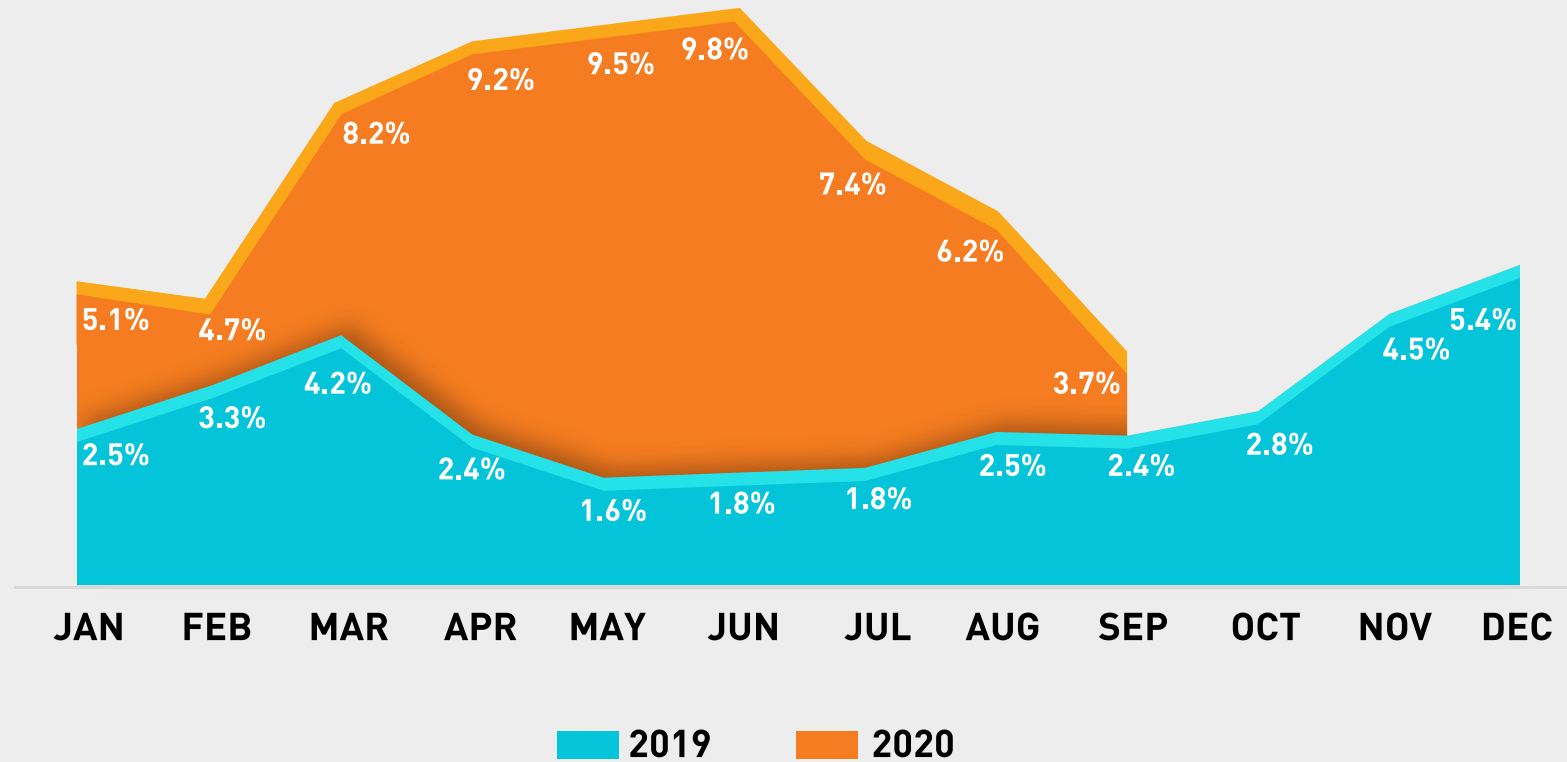
Source: Container Forecaster, Quarter 3, September 2020, Drewry Maritime Research

Idle Ship Capacity - 2019 vs 2020



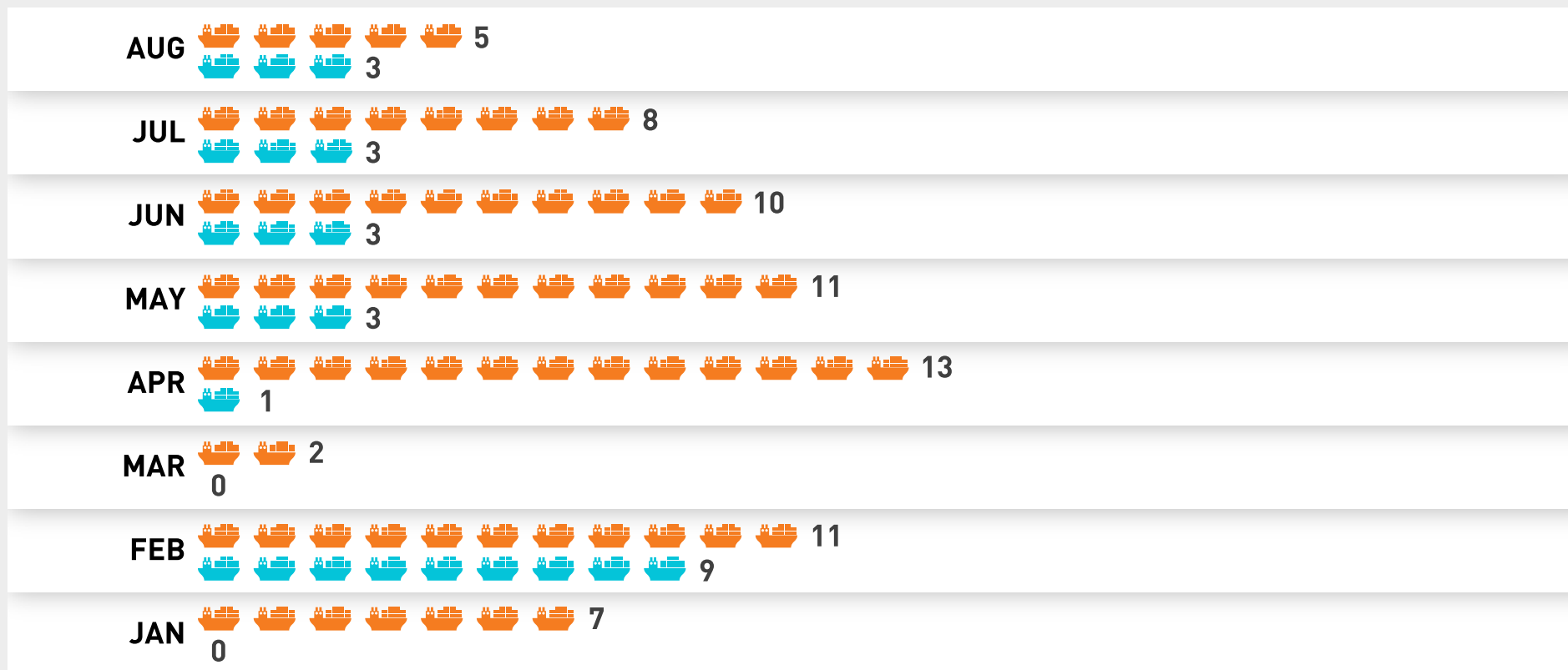
■ 2019 ■ 2020

Idle Ship Capacity Share in Total Fleet (%) 2019 vs 2020



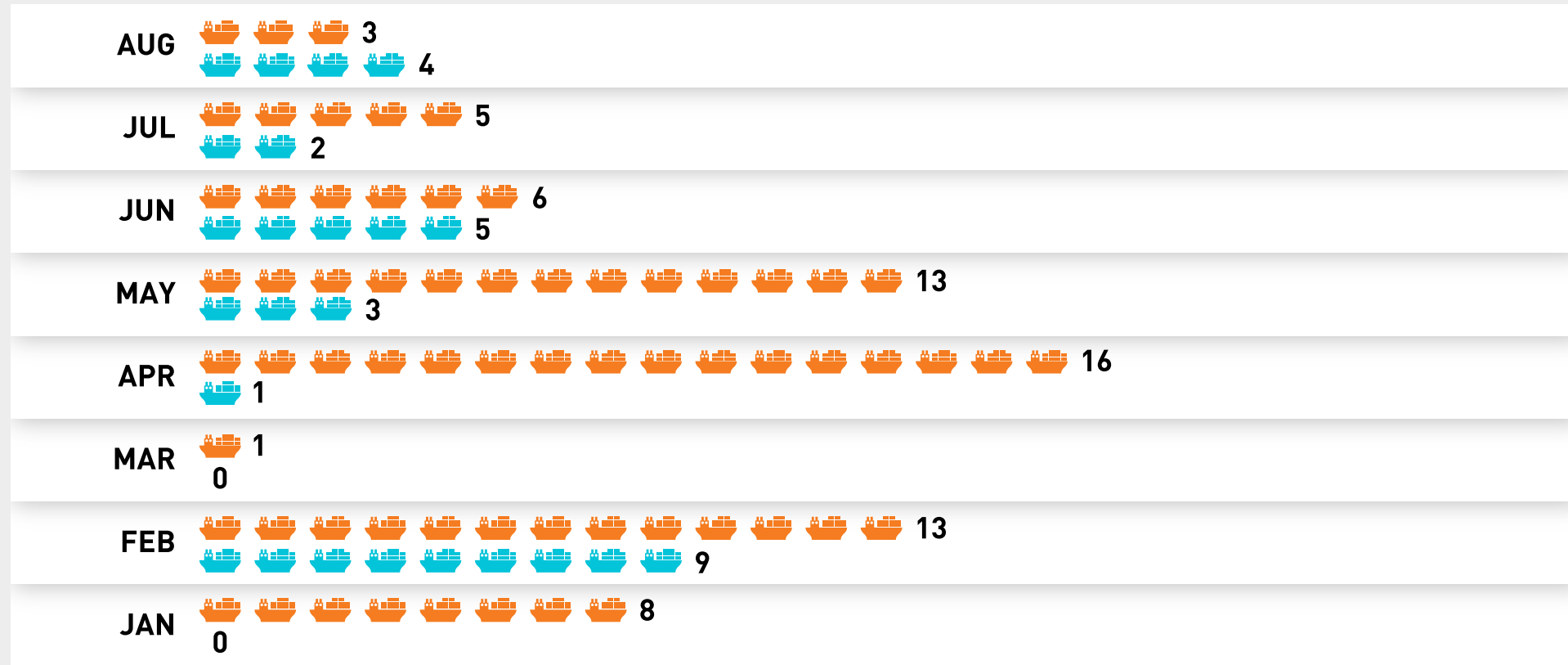
- Dwindled demand for transportation during the first eight months of 2020, pushed the ship idling activity.
- The share of idle capacity (w.r.t. the total ship capacity) remained above 4.5% till August, which is very unusual.
- The idling peaked in June when it almost touched the 10% mark in July 2020 and started declining as the governments started opening up of the economic activities in many parts of the world.

JNPT – Cancelled Ships in 2019 vs 2020



■ 2019 ■ 2020

Mundra - Cancelled Ships in 2019 vs 2020



■ 2019 ■ 2020

Chennai - Cancelled Ships in 2019 vs 2020

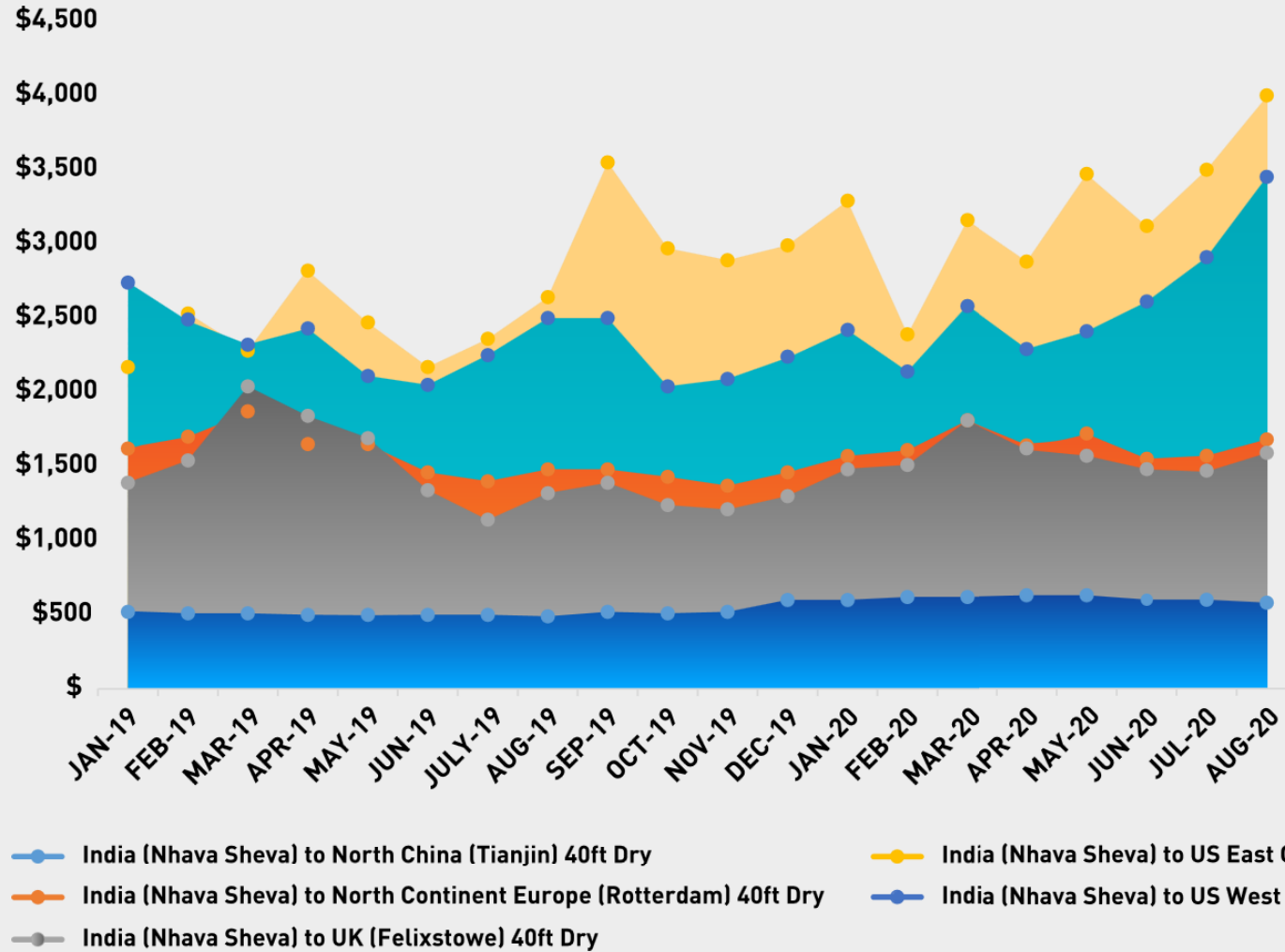


■ 2019 ■ 2020

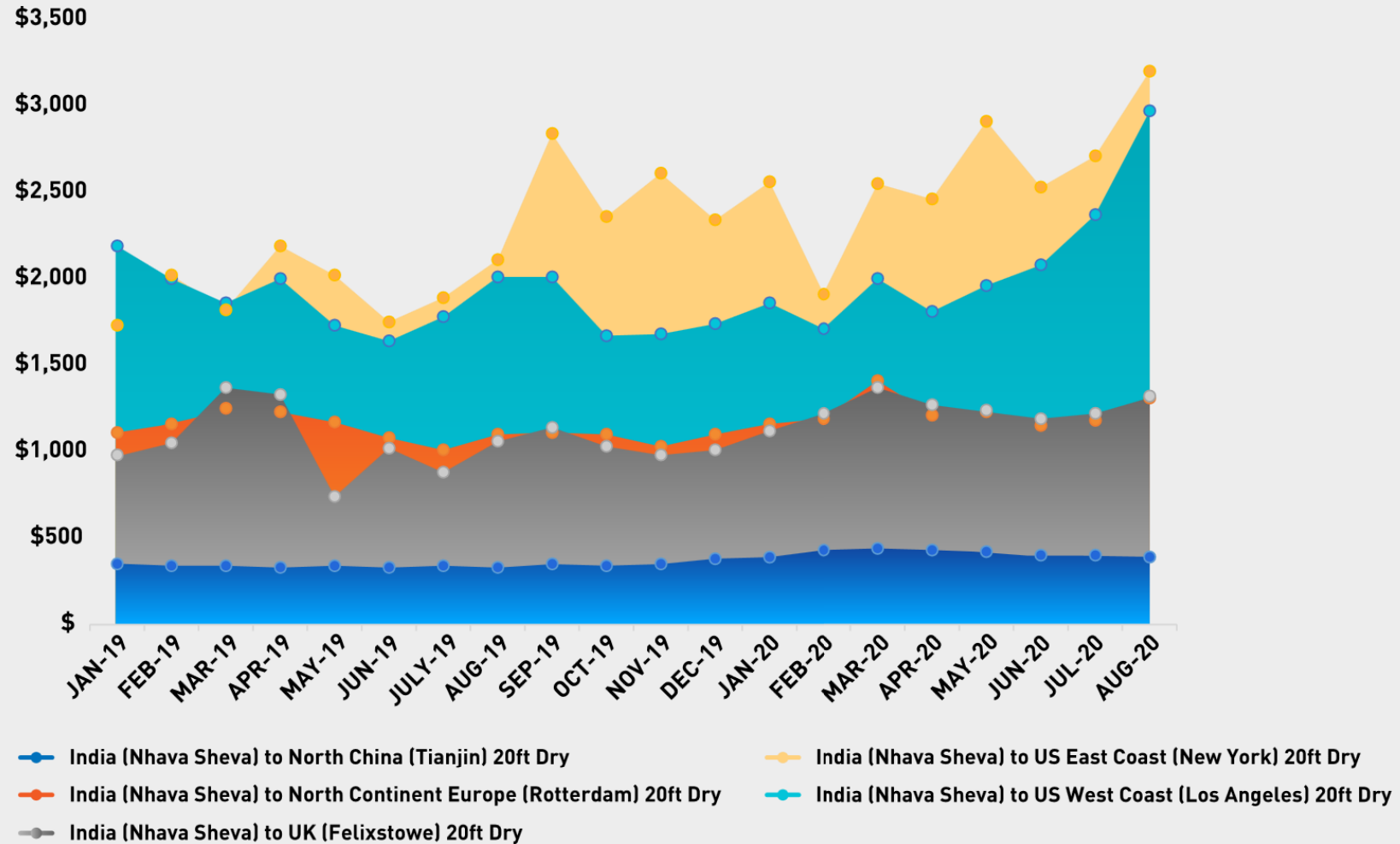
Massive Blank Sailing During the Pandemic

- Declined in economic activity owing to the massive outbreak of the Coronavirus pandemic in major consumption centres like the US and Europe, compelled the carriers/alliances to suspend many services.
- In addition to service suspensions, many sailings were blanked during this period. As per the data available with Drewry, more than 75 sailings were missed during April and May on all major maritime routes.
- India being on the main Asia-Europe route, the impact was prominent. A total of 34 sailings were missed at JNPT during the second quarter of 2020.

Development of Freight Rates 40' on India's Major Export Route



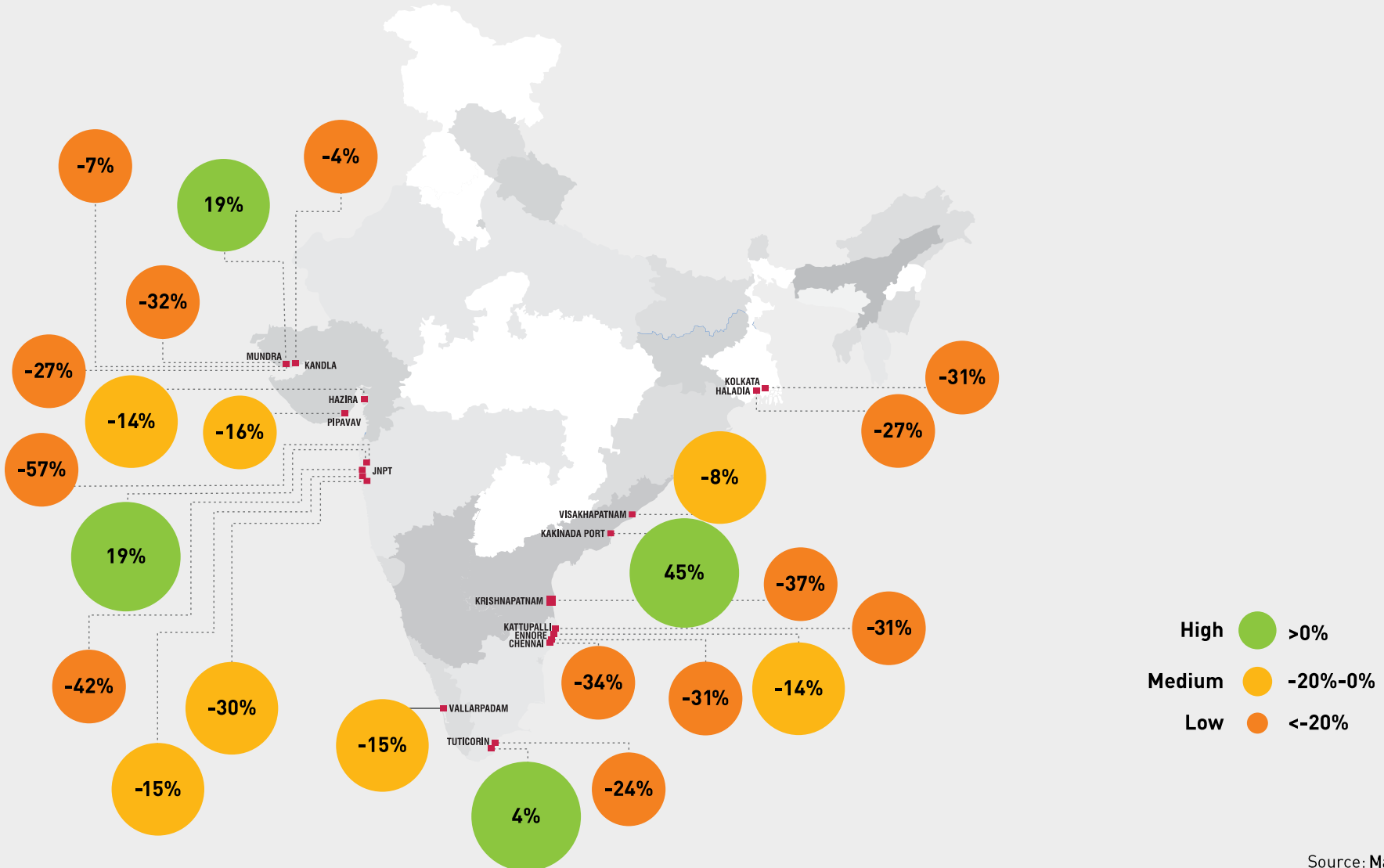
Development of Freight Rates 20' on India's Major Export Route



Freight Rates Peaked During Covid-19

- Strict capacity management by the shipping lines resulted in soaring of the freight rates across all major trade routes.
- It is in sharp contrast to the trends observed in the 2008-09 financial crisis. Thanks to the disciplined alliance system and the presence of fewer shipping lines (compared to the 2008 scenario).
- Drewry's East-West Freight Rate Index reached \$2,775 in September 2020, highest since 2011.
- Rates for JNPT-New York (40 ft box) reached \$4,000, highest since 2015.

Indian Container Throughput Growth During Covid (April - August)



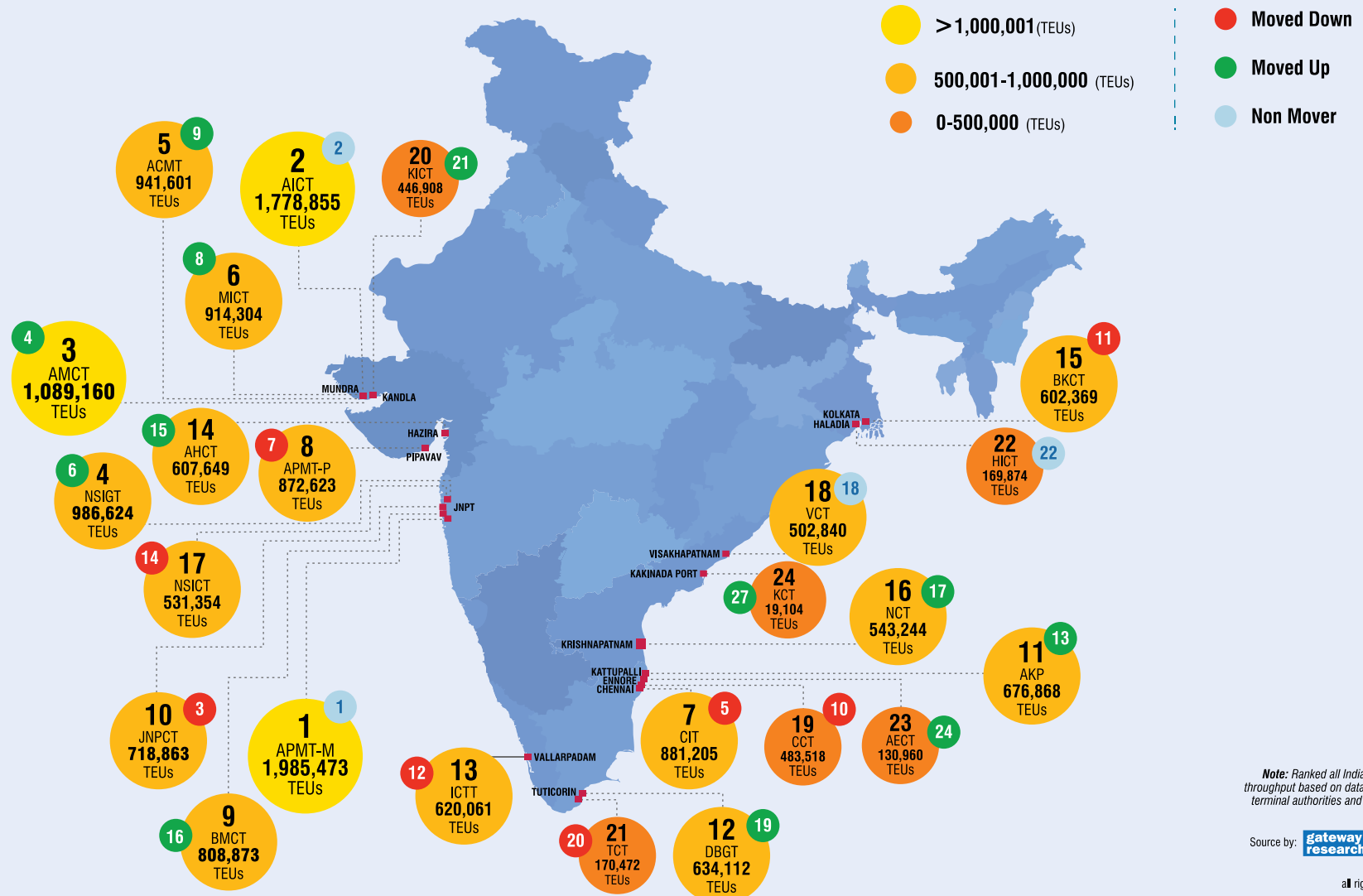
High ● >0%
 Medium ● -20%-0%
 Low ● <-20%

Container Terminals Ranking (FY 2019-2020)

Total Installed Capacity
28,650,000 TEUs
28,650,000 TEUs

Total Throughput
17,116,914 TEUs
16,787,508 TEUs

- APMT-M : APM Terminals - Mumbai
- AICT : Adani International Container Terminal
- AMCT : Adani Mundra Container Terminal
- NSIGT : Nhava Sheva India Gateway Terminal
- ACMT : Adani CMA Mundra Terminal
- MICT : Mundra International Container Terminal
- CIT : Chennai International Terminal
- APMT-P : APM Terminals - Pipavav
- BMCT : Bharat Mumbai Container Terminals
- JNPCT : Jawaharlal Nehru Port Container Terminals
- AKP : Adani Kattupalli Port
- DBGT : Dakshin Bharat Gateway Terminal
- ICTT : Vallarpadam International Container Transhipment Terminal
- AHCT : Adani Hazira Container Terminal
- BKCT : Bharat Kolkata Container Terminal
- HICT : Haldia International Container Terminal
- NCT : Navayuga Container Terminal
- NSICT : Nhava Sheva International Container Terminal
- VCT : Visakha Container Terminal
- CCT : Chennai Container Terminal
- KICT : Kandla International Container Terminal
- TCT : PSA SICAL Tuticorin Container Terminal
- AECT : Adani Ennore Container Terminal
- KCT : Kakinada Container Terminal



Note: Ranked all Indian container terminals as per the throughput based on data obtained from ports / container terminal authorities and also from other reliable sources

Source by: **gateway research** | www.gatewayresearch.in

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Throughput (TEUs) handled Vs Y-O-Y growth (%) analysis in FY (2019-20)

High Throughput, High Growth Terminals
ACMTPL, BMCTPL, MICT

Medium Throughput, High Growth Terminals
AKPCT, DBGT, KICT, VCT

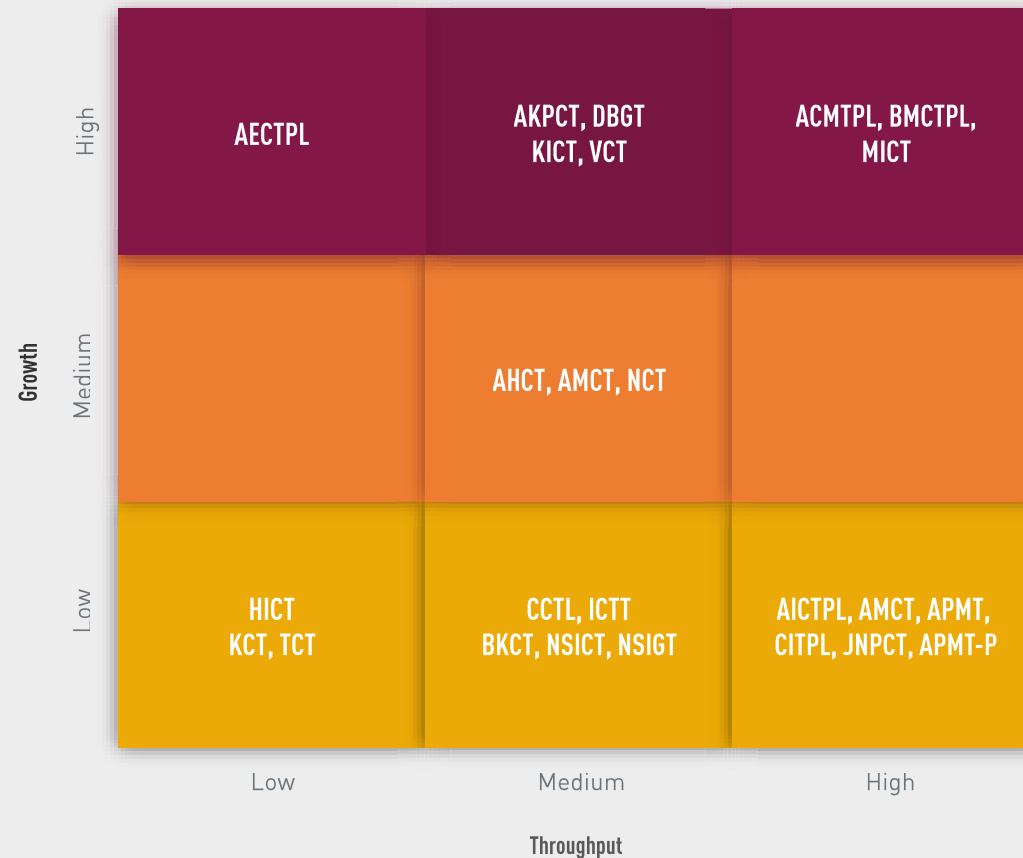
Low Throughput, High Growth Terminals
AECTPL

Medium Throughput, Medium Growth Terminals
AHCT, AMCT, NCT

High Throughput, Low Growth Terminals
AICTPL, AMCT, APMT, CITPL, JNPCT, APMT-P

Medium Throughput, Low Growth Terminals
CCTL, ICTT, BKCT, NSICT, NSIGT

Low Throughput, Low Growth Terminals
HICT, KCT, TCT



- APMT-M : APM Terminals - Mumbai
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	Throughput (TEUs)	Growth (Y-O-Y)(%)
High	>700,000	>12%
Moderate	700,000-350,000	6%-12%
Low	<350,000	<6%

Top 10 Import Commodities

**IRON AND
STEEL, AND
PRODUCTS**

**RESIDUAL
CHEMICALS AND
ALLIED
PRODUCTS**

**ELECTRIC
MACHINERY AND
EQUIPMENTS**

**AUTO
COMPONENTS/
PARTS**

**COPPER AND
PRODUCTS MADE
OF COPPER**

**ELECTRONIC
COMPONENTS &
INSTRUMENTS**

**COMPUTER
HARDWARE, AND
PERIPHERALS**

**AC,
REFRIGERATION
MACHINERY**

**ALUMINIUM,
PRODUCTS OF
ALUMINIUM**

**MACHINE
TOOLS**

Top 10 Export Commodities

**MARINE
PRODUCTS**

**DRUG
FORMULATIONS,
AND BIOLOGICALS**

**ORGANIC &
AGRO CHEMICALS**

**MOTOR
VEHICLE/CARS**

**RMG COTTON,
FABRICS, AND
MANMADE YARN**

**IRON, STEEL,
AND PRODUCTS**

**RICE -
BASMOTI**

DYES

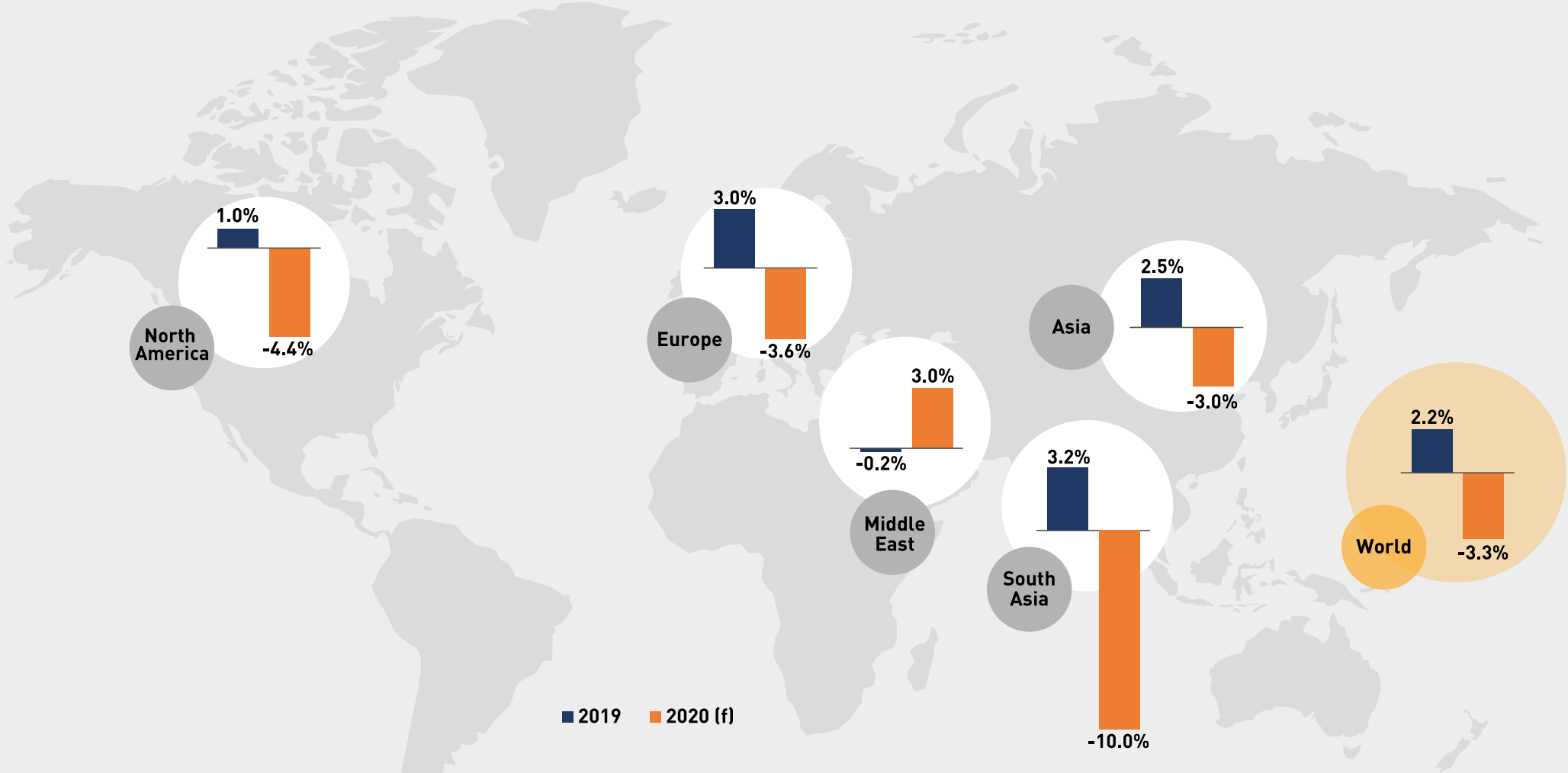
**ALUMINIUM,
PRODUCTS OF
ALUMINIUM**

**ELECTRIC
MACHINERY AND
EQUIPMENT**

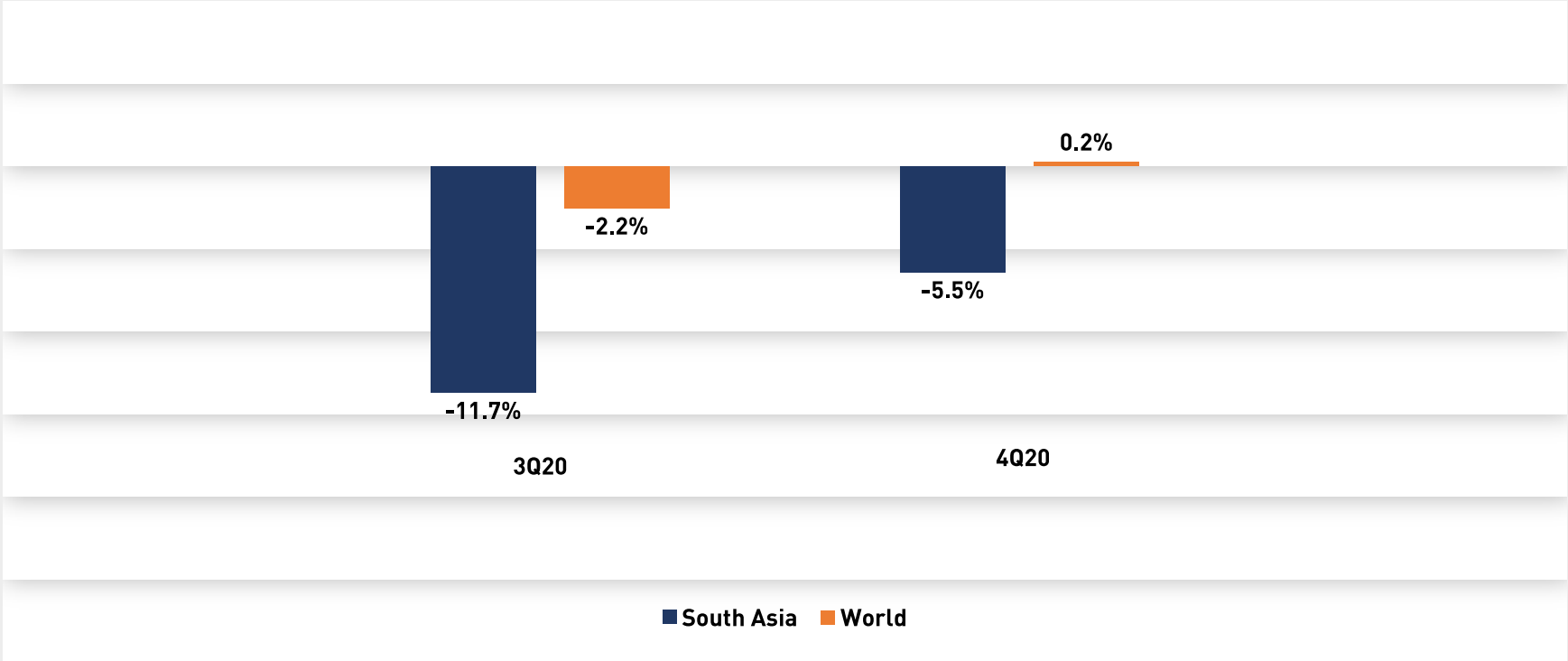
Top 10 Countries of Origins & Destinations



Container Throughput Growth Forecast at Major Regions



Quarterly Forecast of Container Throughput Growth in South Asia and World



- Container port throughput confounded expectations in 2Q20 to register a far smaller decrease than envisaged.
- We expect the port handling at ports around the world to decline by 3.3% in 2020. With a low base, we expect the port throughput to grow by 6.6% in 2021.
- South Asia is likely to continue posting a negative return until the second quarter of 2021. We expect South Asia port throughput to decline by 10% in 2020. However, the recovery should start in 2021 with a growth rate of 8.1%.

Thank You

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