

Topical issues and challenges for East Africa's transportation and logistics infrastructure

Intermodal Africa 2025 Conference

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Agenda

- 1 Context: East Africa's main ports
- 2 Gateway port throughput in East Africa
- 3 Gateway throughput and outlook by region
- 4 Transshipment throughput, maximum ship sizes and connectivity in East Africa
- 5 Waiting times and terminal productivity in East Africa
- 6 Overview of ship sizes constraints
- 7 Energy transition – use of alternative fuels by shipping lines

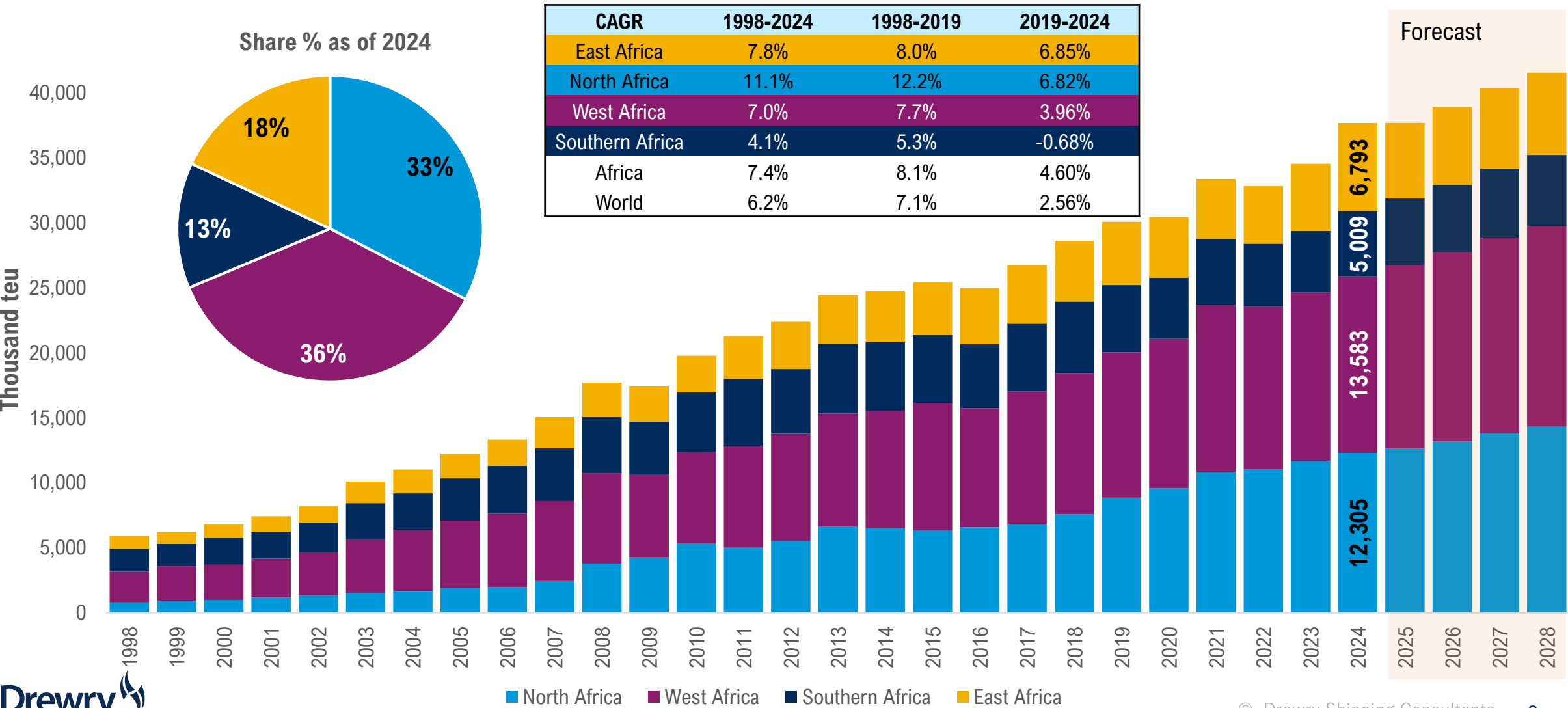


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Rigorous analysis – Practical advice

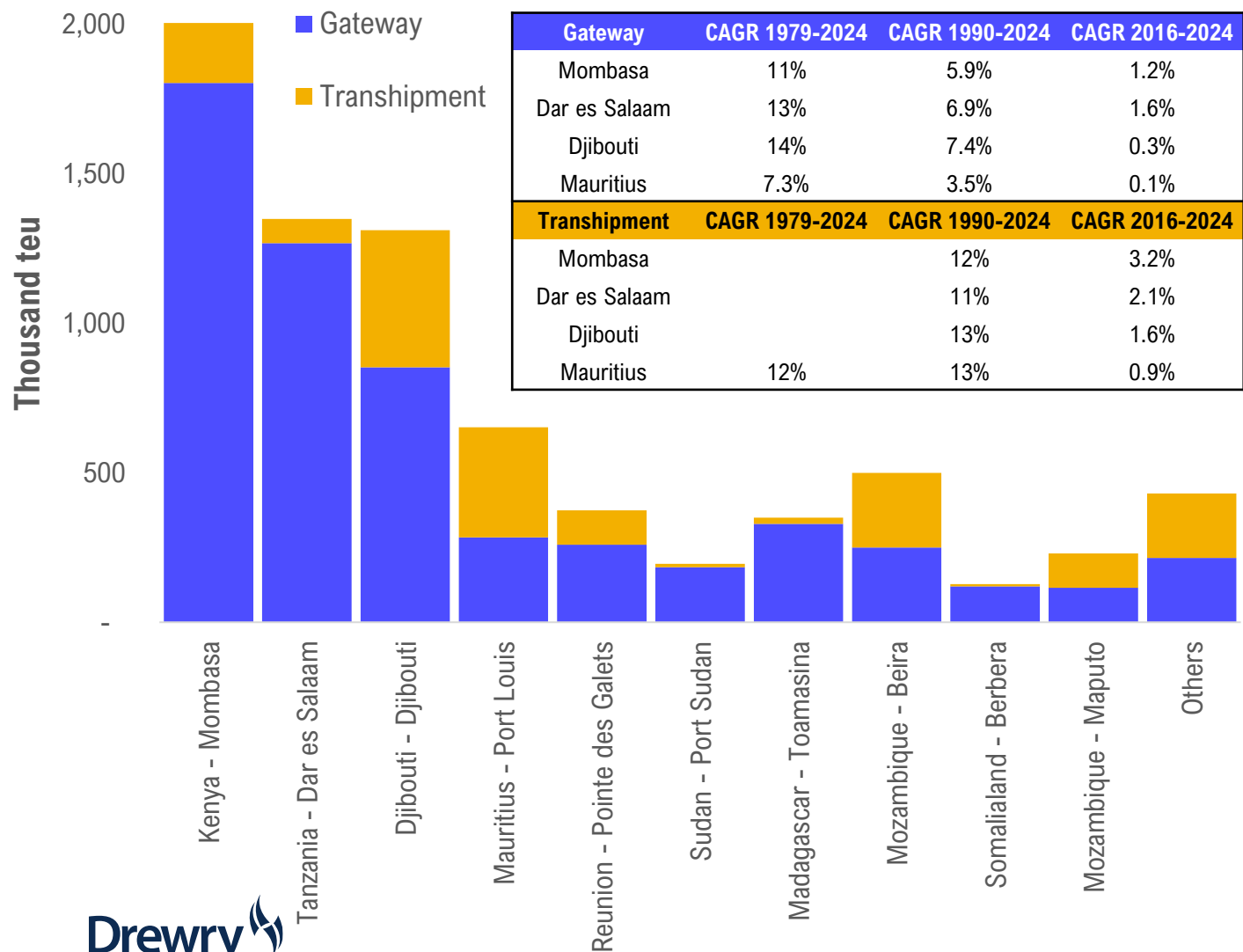
Container port throughput by region

Container port throughput by region, thousand teu

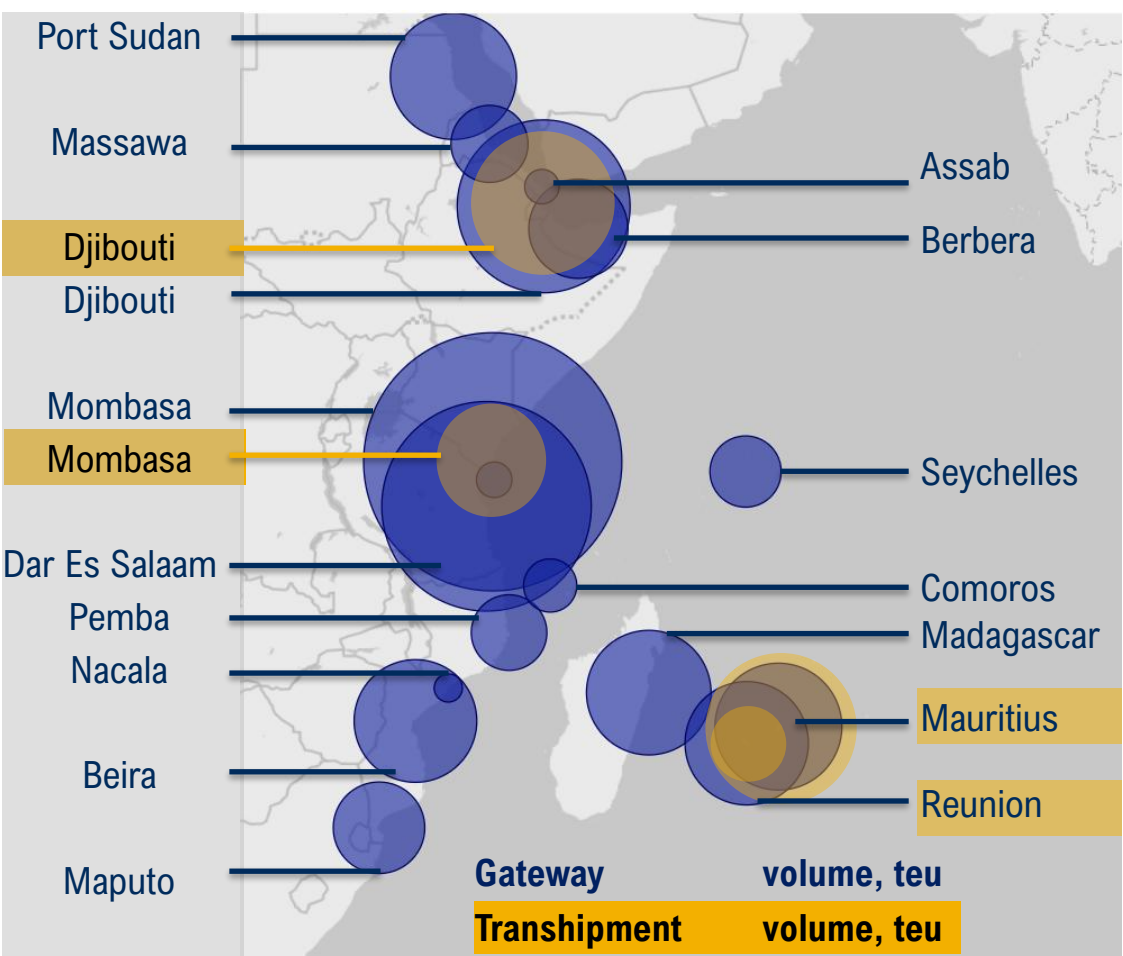


Context: East Africa's main ports

Gateway and transshipment ports, 2024 throughput (thousand teu)



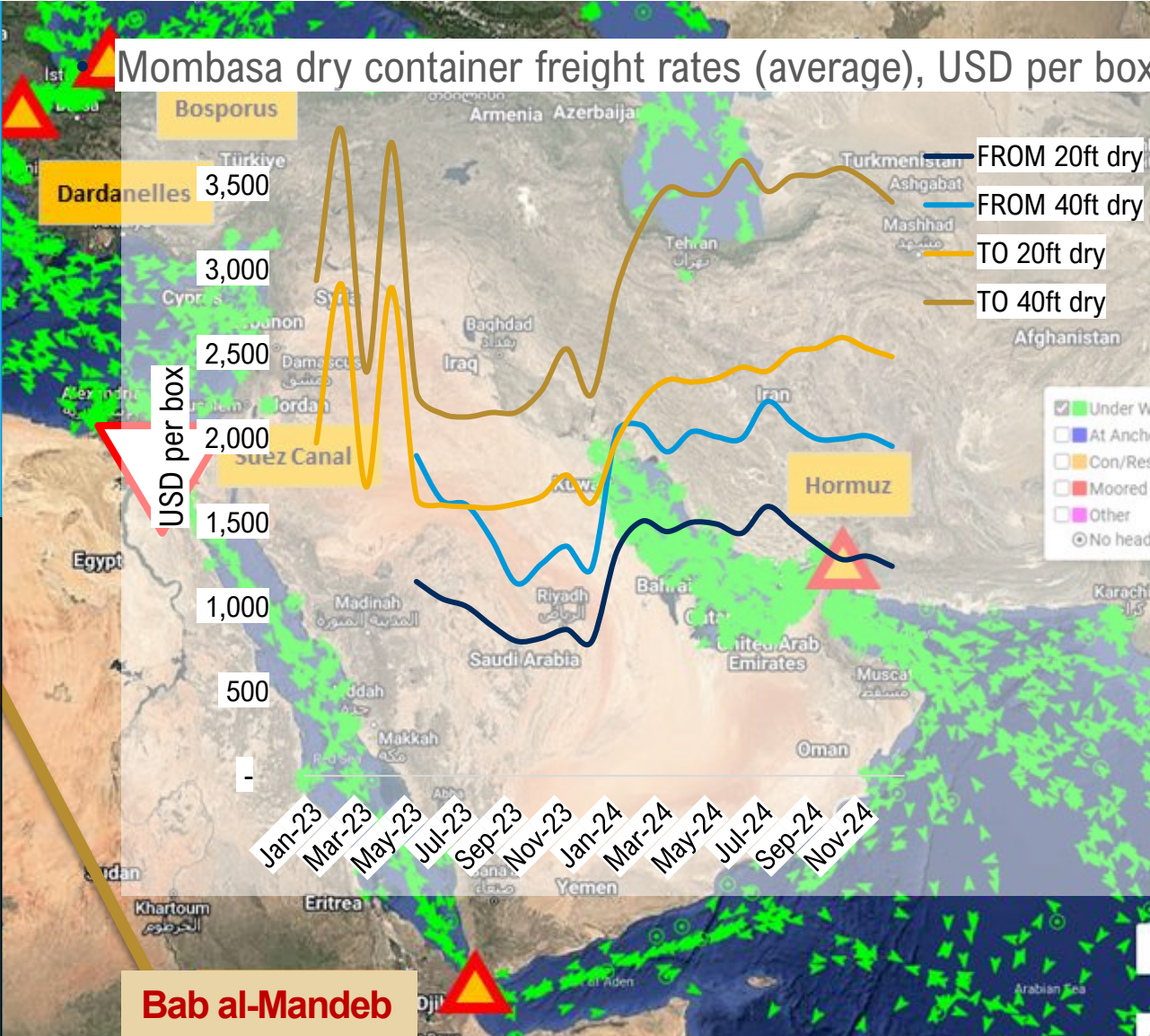
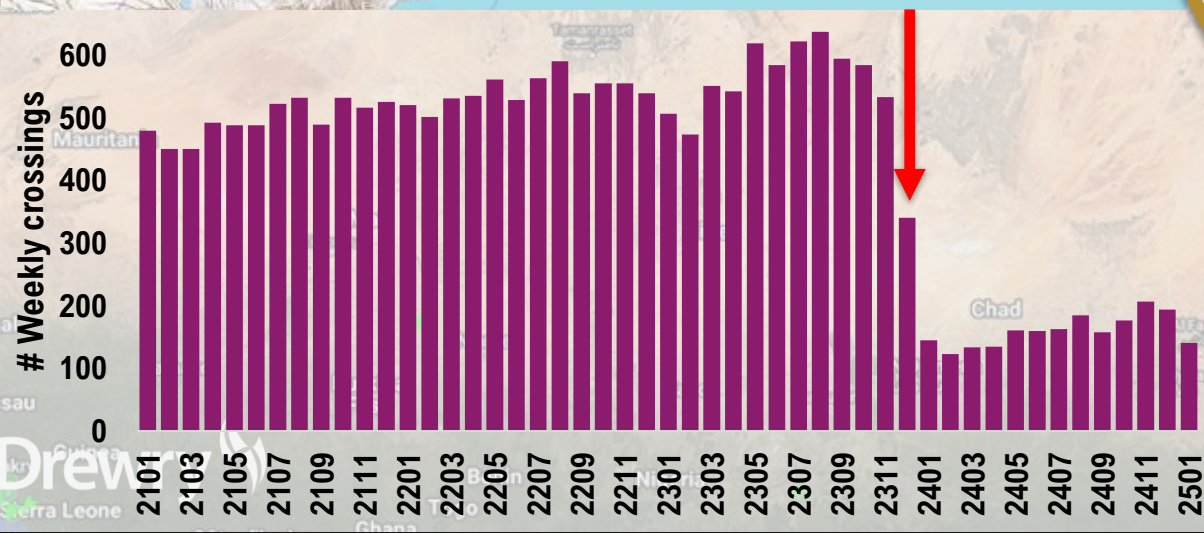
17 Gateway ports and 4 transshipment ports, 2024 teu throughput



Red Sea crisis: Bab al-Mandeb straight and ceasefires in the region



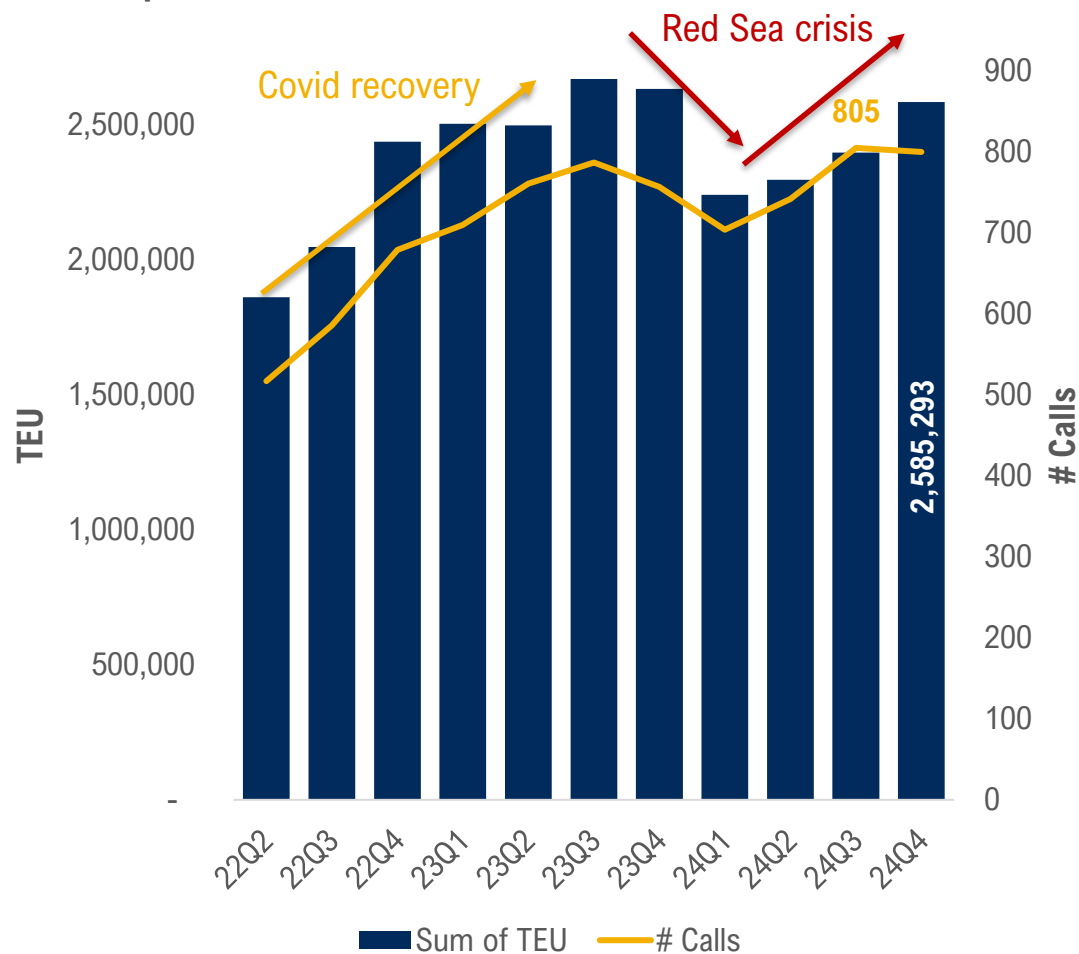
Bab al-Mandab: # weekly containerships crossings



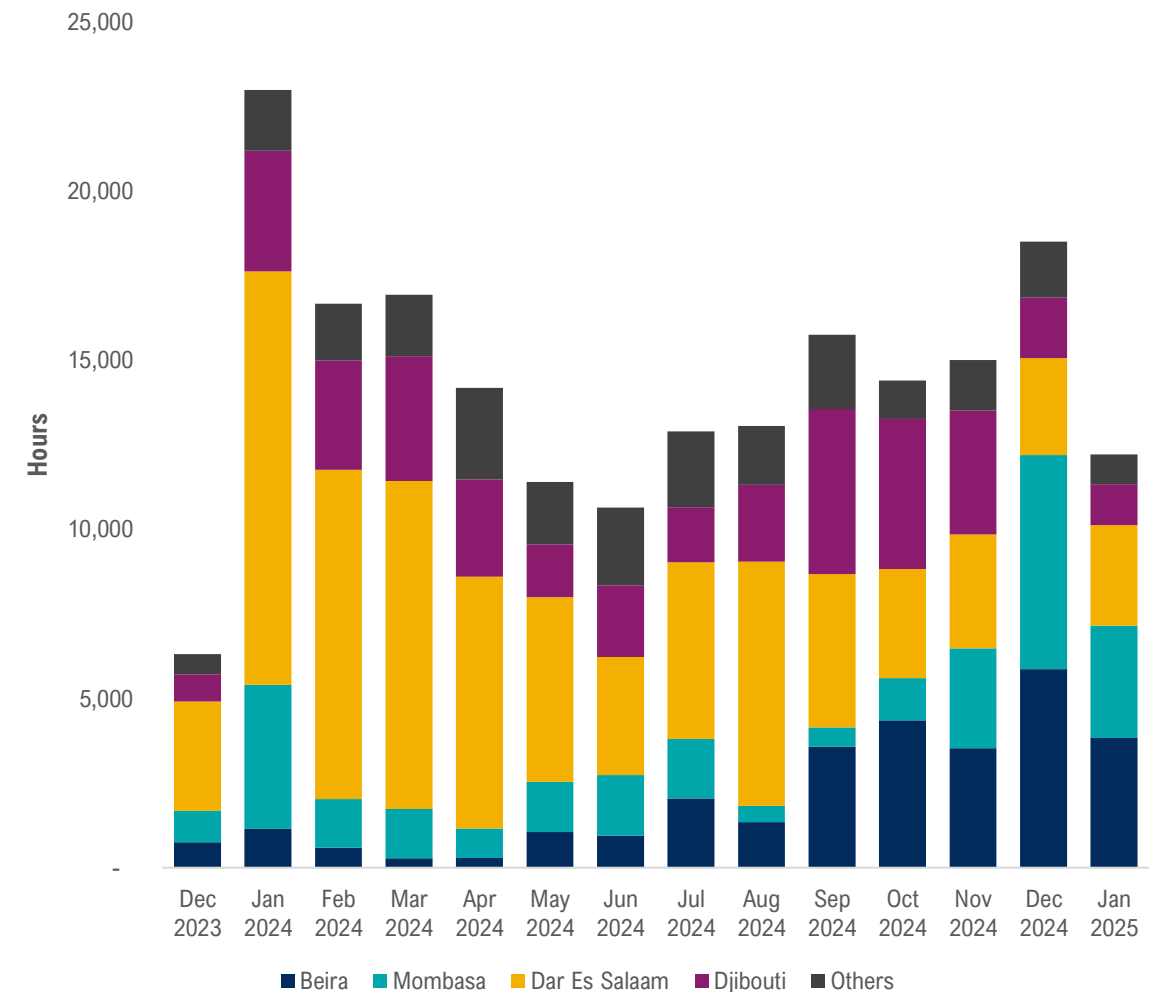
Source: Drewry AIS, Drewry Maritime Research. Drewry Supply Chain Advisors, Container Freight Rate Index

Traffic and waiting times in East Africa

Number of port calls in East Africa

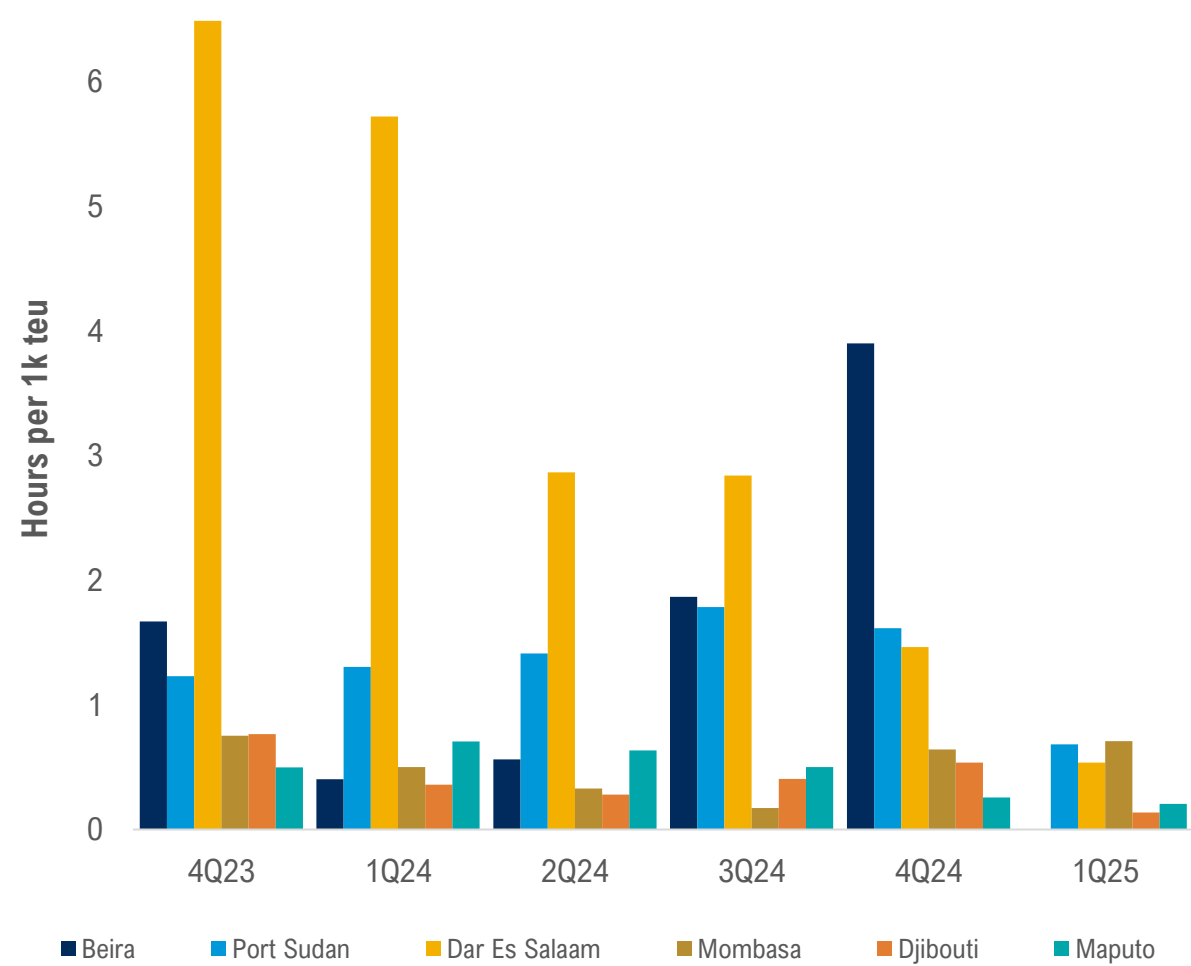


Containerships waiting (hours) in East African ports

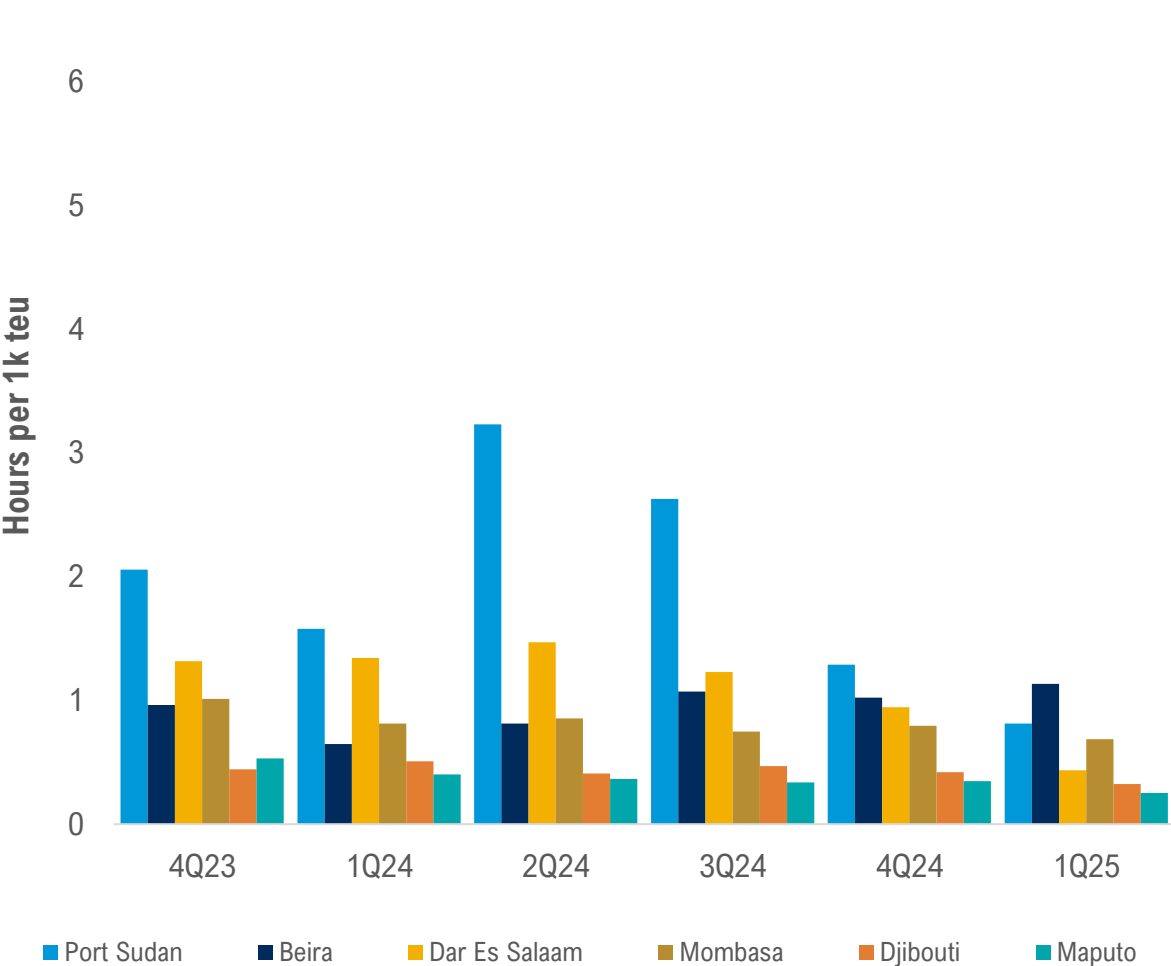


Waiting times and terminal productivity in East Africa

Waiting Duration Days per 1k teu

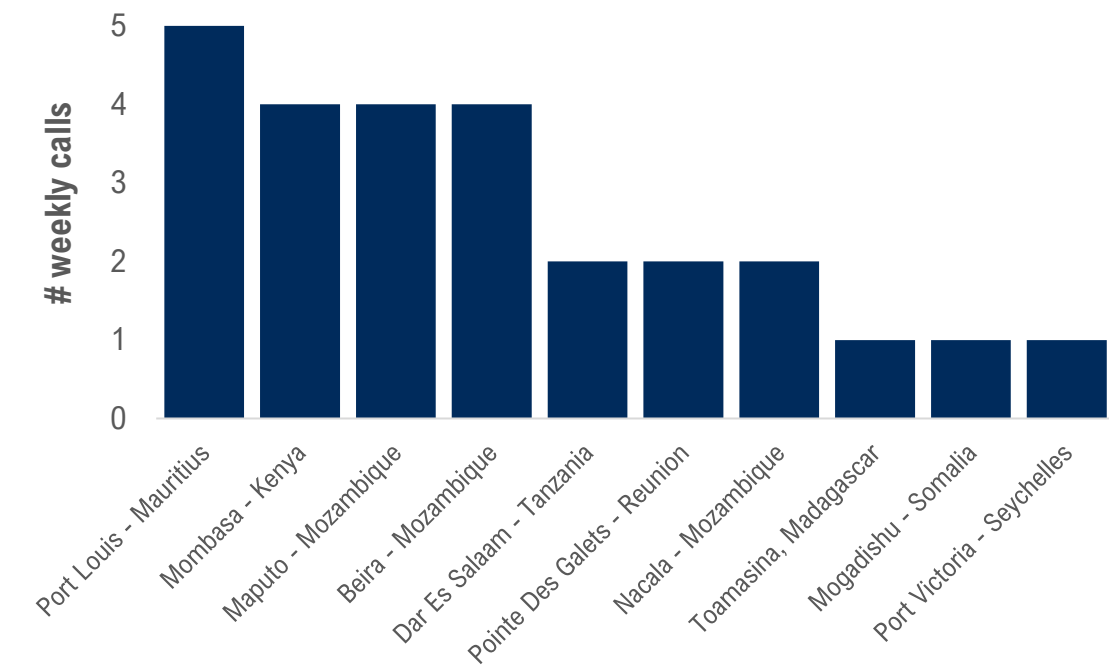


Terminal Duration Days per 1k teu

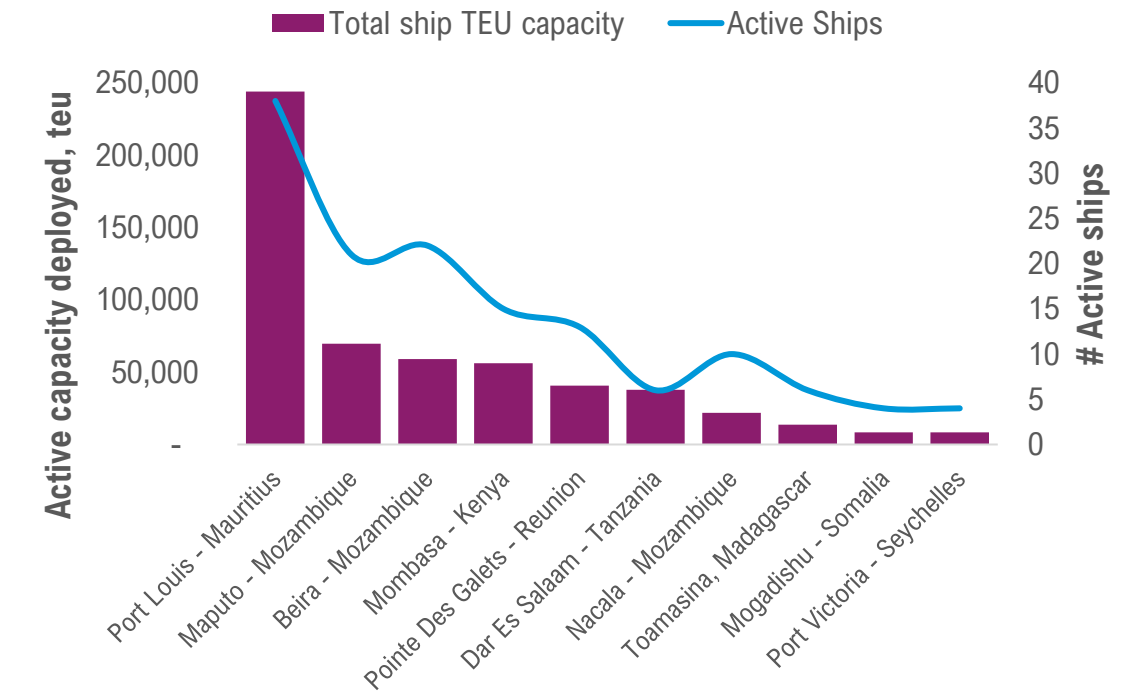


Deep sea services in East Africa

weekly containership calls in East African ports



Ship capacity deployed in East Africa, teu

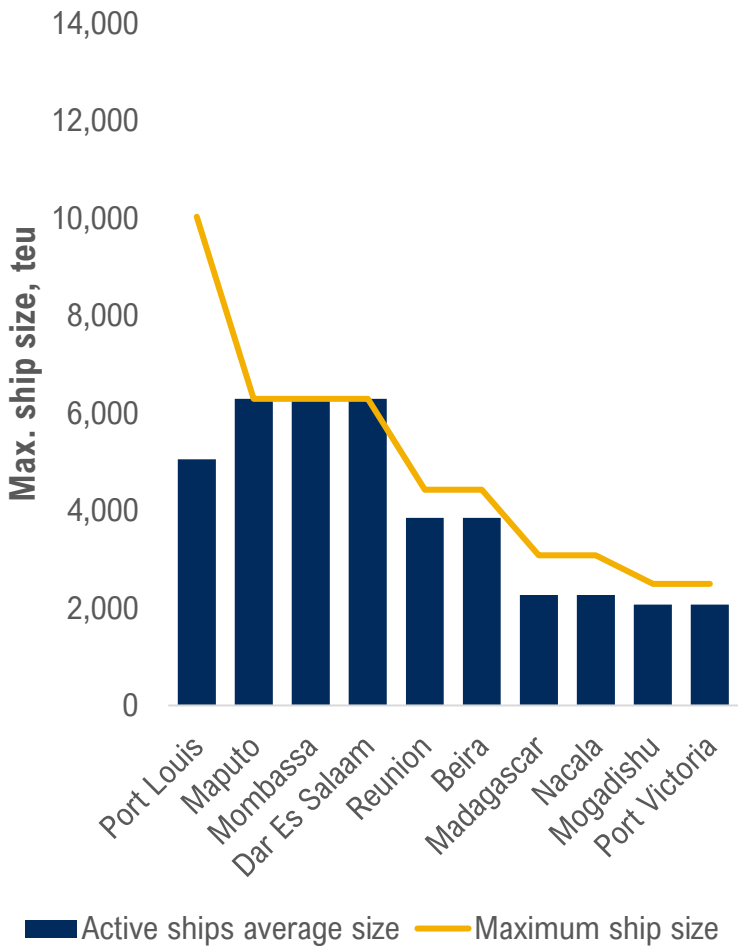


Port	All	Mauritius	Dar Es Salaam	Mombassa	Maputo	Reunion	Beira	Madagascar	Nacala	Mogadishu	Seychelles
Average TEU (Active Ships)	5,052	5,052	6,296	6,296	6,296	3,851	3,851	2,270	2,270	2,073	2,073
Maximum ship TEU	10,034	10,034	6,296	6,296	6,296	4,431	4,431	3,081	3,081	2,496	2,496

Service Name	Ignazio Messina - Med- Red Sea- S/E Africa	PIL - MZS	CMA CGM/Maersk/ONE/ Hamburg-Sud - Safari/Shaka 2			MSC - Ingwe Express	CMA CGM/Maersk/Sealand - ONE/Unifeeder A/S/OOCL - Mozex/M-Express			MIM/Mozambique West India	CMA CGM - Noura Express
	Dar Es Salaam, Mombasa, Maputo	Mauritius, Madagascar, Reunion, Maputo, Beira, Nacala	Mauritius			Mauritius	Reunion, Maputo, Beira, Mauritius			Mombasa, Beira, Maputo	Mogadishu, Mombasa, Beira, Nacala, Seychelles

Deep sea services and infrastructure limits to ship sizes in East Africa

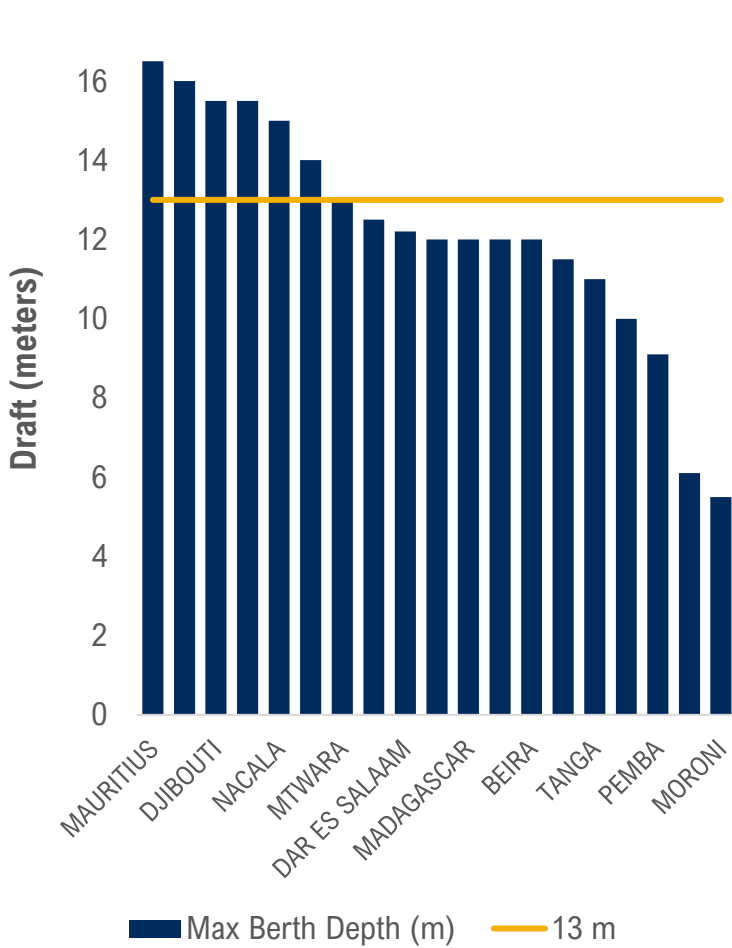
Current maximum ship sizes



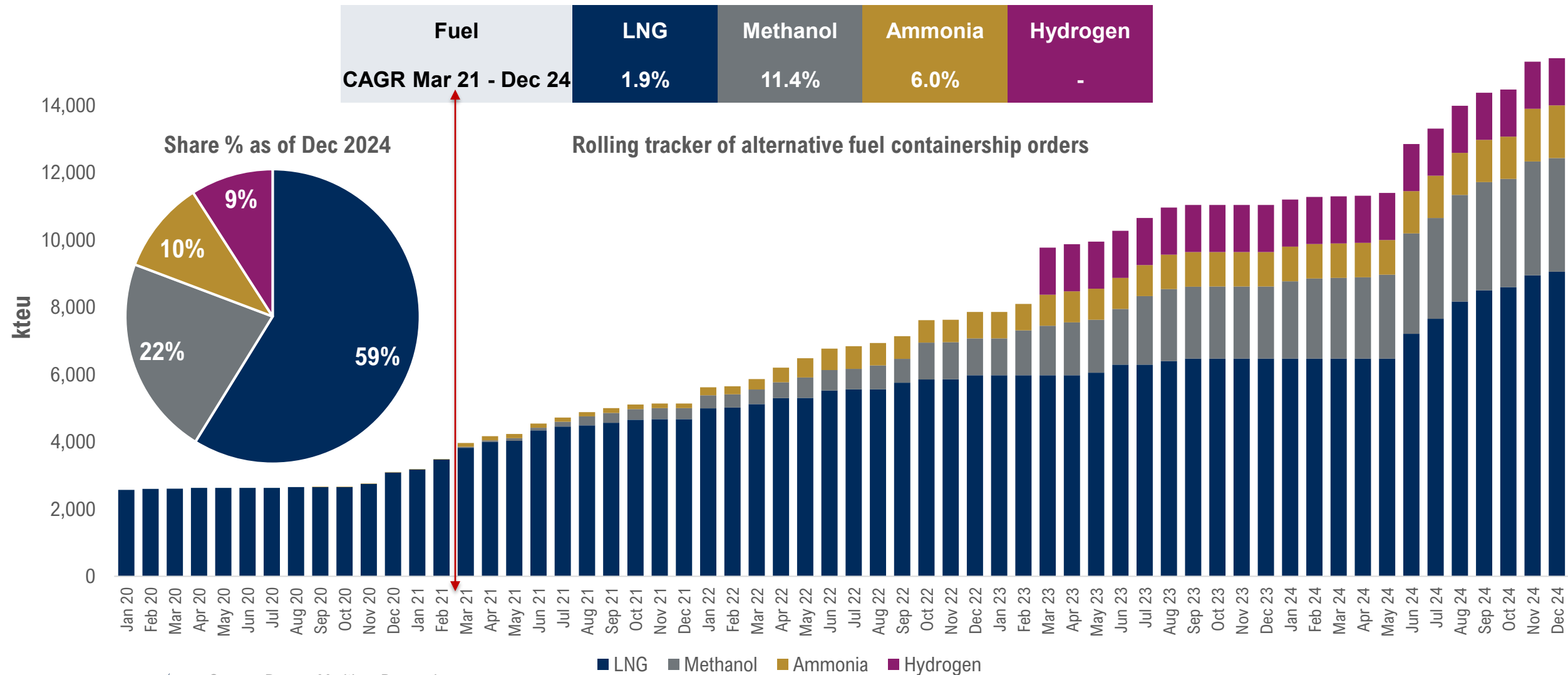
Evolution of the maximum ship sizes 2024 vs. 2019



Max Berth Depth (m)



Energy transition – use of alternative fuels by shipping lines



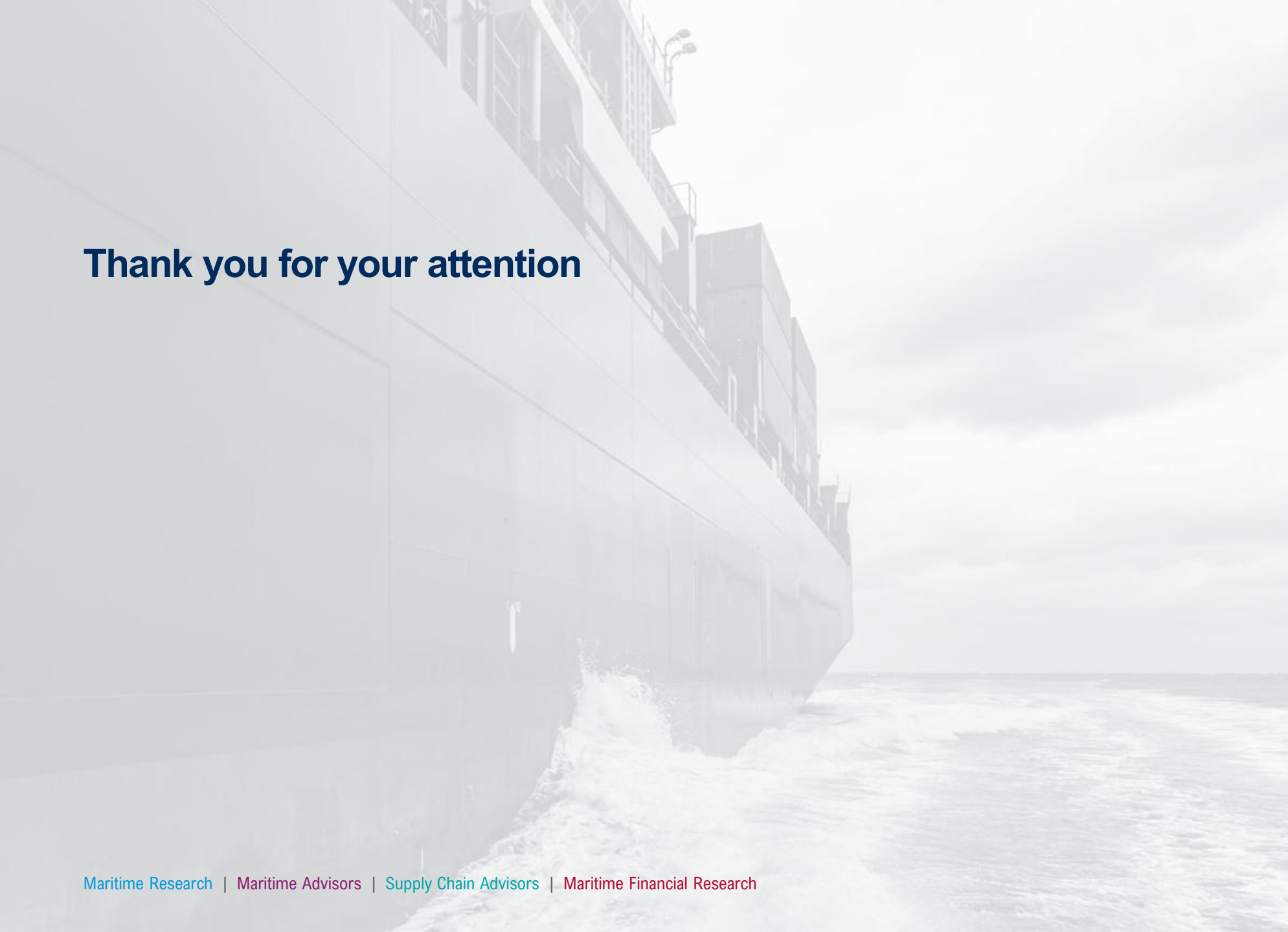


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