

# Hamburg-Le Havre Range topped 40 million TEU in 2011

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With six TEU millionaires on a coastline of only 500 sea miles and a seventh port to enter this league soon, the North Range is one of the busiest port regions in the world. A recent study conducted by the ISL provides new insights on the various traffic flows passing through these ports.

In 2010, the base year of the study, the six major North Range ports Rotterdam, Hamburg, Antwerp, Bremen/Bremerhaven, Zeebrugge and Le Havre handled 37.3 million TEU. This traffic includes three major types of trade:

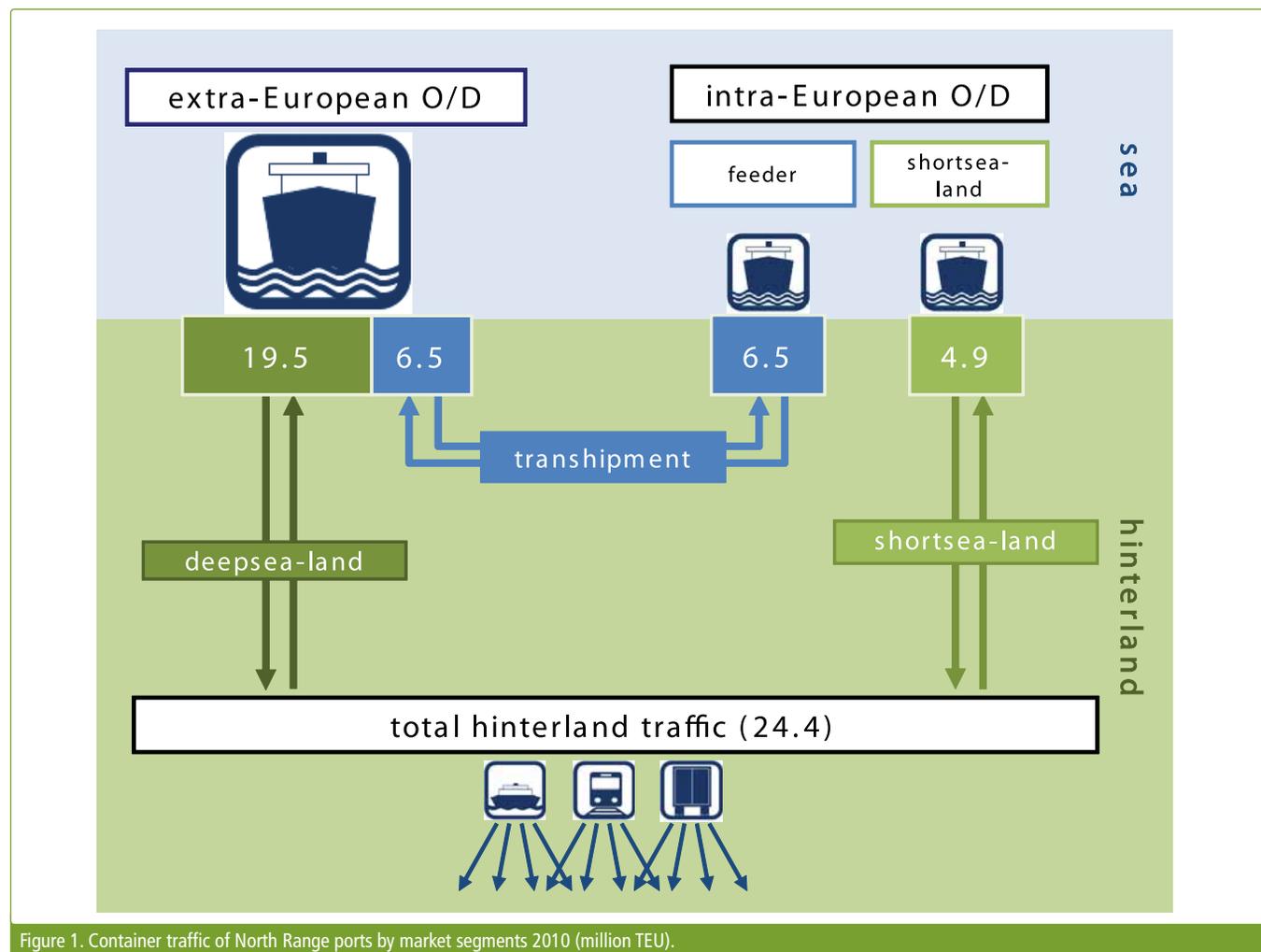
- Deepsea-land: traffic between extra-European origins/destinations and the North Range ports' hinterland
- Shortsea-land: shortsea traffic between European countries and the North Range ports' hinterland
- Transshipment: containers shifted between mainline and feeder vessels.

More than half of the North Range ports traffic (19.5 million TEU in 2010) is deepsea-land traffic, for example, imports from

China destined to the North Range ports' hinterland. Transshipment traffic between mainline and feeder vessels generated 13.0 million TEU of container handlings (35 percent), while shortsea-land traffic accounted for 4.9 million TEU of the ports' handlings.

## Hinterland traffic

Overall hinterland traffic, that being deepsea-land and shortsea-land, totalled 24.4 million TEU, almost as much as in 2008 (24.9 million TEU). The largest market is Germany with a share of 37.5 percent (9.2 million TEU). The total container traffic generated by the German economy is still higher since many of the goods unloaded in Dutch or Belgian distribution centres continue their journey to Germany by conventional trucks. For the Belgian distribution centres, Northern France and the Paris area are also very important markets. This explains the rather high shares of the Netherlands (20.1 percent) and Belgium (19.1 percent) in container hinterland traffic in relation to their population.



Source: ISL North European Container Traffic Model, 2011

Figure 1. Container traffic of North Range ports by market segments 2010 (million TEU).

Source: ISL North European Container Traffic Model, 2011

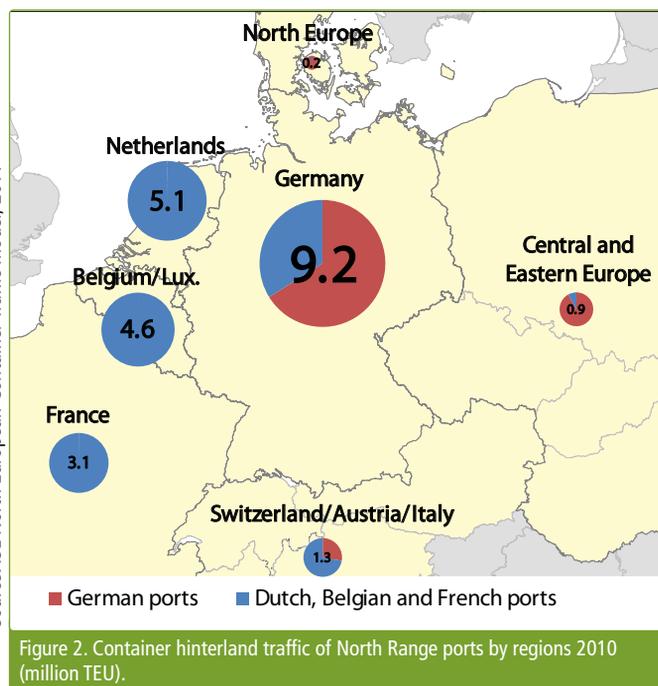


Figure 2. Container hinterland traffic of North Range ports by regions 2010 (million TEU).

The regional distribution of container hinterland traffic changes only gradually as some regions grow more quickly than others. Shifts between ports are usually less frequent and less pronounced than for transshipment traffic. Despite the rather stable development of hinterland traffic, there was a noticeable change between 2008 and 2010: the Danish and the Polish market were increasingly served via the national ports in 2010 – either through feeder traffic or through direct calls of deepsea vessels. This shift of traffic from the hinterland of North Range ports to the regional ports was apparently favoured by low charter rates and overcapacity in the market. Some of the traffic may shift back to the North Range ports in the years to come.

The market share of German ports among the six major North Range ports' hinterland traffic was 30.3 percent in 2010. It reached more than 90 percent for hinterland traffic to Northern and Eastern Germany, Denmark and parts of Central Europe, while it was below 50 percent for practically all regions west of the Rhine.

As regards the seaward origins and destinations, about half of the hinterland traffic (51 percent) was to or from Asia in 2010. The Americas and European shortsea trade followed with 21 and 20 percent, respectively. Africa and Oceania only played a minor role. Once again, there are marked differences between the North Range ports. In Hamburg, Asia had a share of about two thirds, while in Zeebrugge, intra-European traffic was by far the most important in 2010.

Notwithstanding a rather weak fourth quarter, the year 2011 will have marked a new record of container transports between the North Range ports and their hinterland with more than 25 million TEU. Still higher volumes are expected in 2012 – a challenge for ports, infrastructure, and freight forwarders.

### Transshipment traffic

The North Range ports also serve as hub ports for large amounts of container transshipment. According to ISL estimates, 6.5 million TEU were moved between main line and feeder vessels in 2010, hence generating 13.0 million TEU quayside handlings. The volumes would have been even higher if it had not been for Maersk's rearranged AE10 Far East service, which is now also calling in Gdansk and hence reducing the volume of boxes that need to be transhipped in the North Range ports.

Source: ISL North European Container Traffic Model, 2011

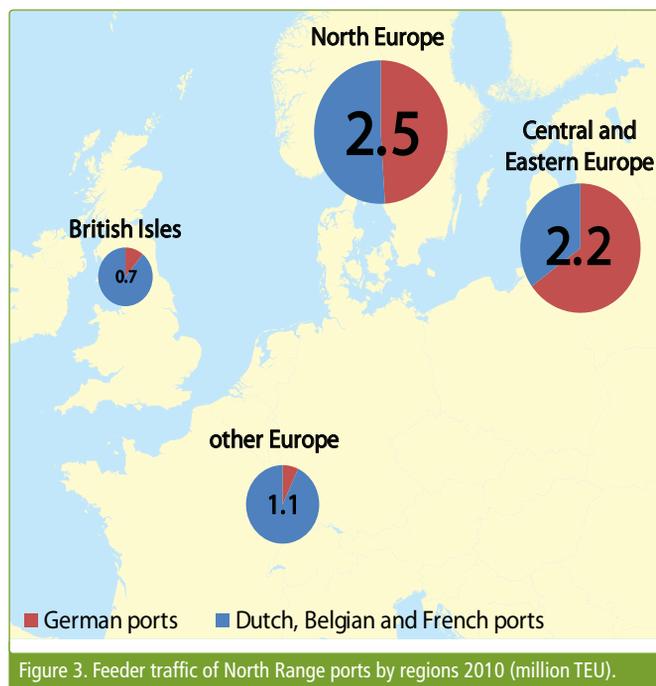


Figure 3. Feeder traffic of North Range ports by regions 2010 (million TEU).

The Baltic Sea/North Europe is the North Range ports' most important feeder market, accounting for 4.7 million TEU of feeder traffic in 2010 (72 percent of the total market). This traffic was evenly distributed between Northern European countries (such as Finland, Sweden, Norway, and Denmark) and Eastern European countries (Poland, the Baltic States, and Russia). Both markets are traditionally covered mostly by the German ports. However, their combined market share dropped from 71 percent in 2008 – the last year ISL conducted a detailed analysis – to just 57 percent in 2010.

The British Isles represent the second largest feeder market at a distant 0.7 million TEU (11 percent). Most lines call at least one UK port in the south-east of Great Britain, for example Felixstowe or Southampton. The transshipment in Rotterdam, Antwerp and Le Havre focuses on smaller ports in the south-west and north of the UK and also ports in Ireland which are not regularly served by deepsea lines.

There is also some intra-range transshipment traffic, even boxes transhipped between neighbouring ports such as Antwerp and Zeebrugge or Bremerhaven and Hamburg. This repositioning mostly occurs in merchant haulage, when the port of loading figuring on the Bill of Lading is not on the schedule of the mainline vessel. Finally, transshipment also takes place between the North Range and ports on the Atlantic Coast and in the Mediterranean.

Transshipment traffic was much more volatile during the past years than hinterland traffic. On the one hand, the transshipment market reacted stronger to the crisis, most notably due to a decrease of Russian traffic by 33 percent in 2009. On the other hand, transshipment can be shifted more easily between ports than hinterland traffic. In 2009 and 2010, the German ports lost large parts of their market shares to Rotterdam, Antwerp and Zeebrugge. The significant decline of both bunker prices as well as time charter rates for container vessels made shifting cargoes away from Hamburg and Bremen/Bremerhaven easier during the crisis, regardless of their proximity to the Kiel Canal. The larger proportion of deepsea liner stakes in Zeebrugge, Antwerp and Rotterdam might have played a role as well as operators had to fill 'their' terminals first.

In 2011, however, transshipment traffic started to move back to German ports. At the same time, a rapid expansion in Russia and

Poland fuelled the development in this segment. As a result, the growth of total container traffic could have hardly been spread more unevenly between the North Range ports. According to preliminary estimates, handling volumes grew by about 20 percent in Bremen/Bremerhaven and by around 15 percent in Hamburg, whilst traffic in Zeebrugge and Le Havre actually

declined in 2011. Rotterdam also lost some ground but was able to defend parts of the market shares it gained in 2009 and 2010. As a result, container traffic in Europe's largest port was already 10 percent higher in 2011 than before the crisis, while Hamburg will only reach its previous record of 9.9 million TEU in 2012 or 2013.

**ABOUT THE AUTHORS**

**Sönke Maatsch** is an economist at ISL's Maritime Economics and Transport department with a focus on port traffic development and forecasting. He conducted a variety of consulting projects for ports in the North Range. Besides his consulting activities, he is responsible for ISL's statistical publications.

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**ABOUT THE COMPANY**

The **Institute of Shipping Economics and Logistics** (ISL) is an independent non-profit foundation conducting research and providing consultancy to private and public organisations around the world. The Maritime Economics and Transport department closely monitors the development of shipping markets, seaborne trade, and port traffic.

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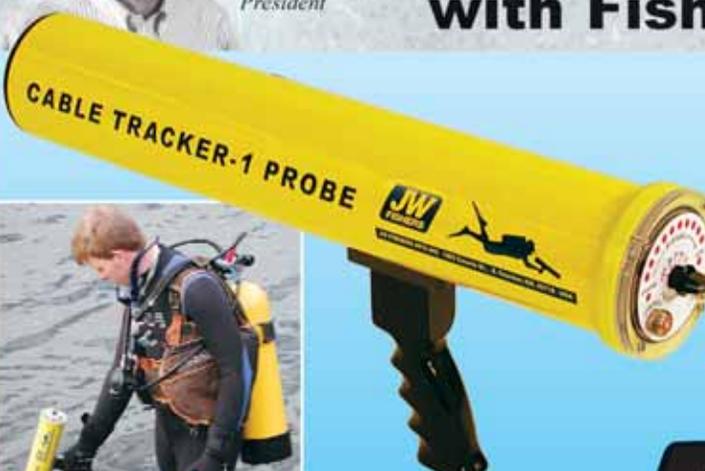
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