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260 million TEU additional container handling capacity expected to be built until 2023

到2023年，全球新建集装箱装卸量有望达到2.6亿TEU

Klipphausen, Germany, 3rd September - The 5th edition of the market report *Container Terminal Project Pipeline* published by German DS Research takes a closer look on upcoming container terminal projects, their chances to get completed and industry growth. About 350 expansion projects target to supply 270 million TEU additional container handling capacity up to year 2023 –two thirds of the projects are expected to get completed.

9月3日德国克利福森报道 – 由德国独立航运业研究机构 DS Research 出版的第五版市场报告《集装箱码头项目汇总》重点关注于未来集装箱码头项目的建设、项目成功完成的可能性以及市场增长趋势。目前全球计划在 2023 年前开建的集装箱码头项目约有 350 个，这些项目的集装箱装卸总量将达 2.7 亿 TEU，其中 2/3 的项目有望最终得以建成。

Developers are in general too optimistic regarding the expansion of existing facilities or the construction of greenfield sites. The scope and timing of projects is usually adjusted to market demand, resulting in projects getting downsized, postponed or cancelled.

对于现存设施的扩建和新项目的建设，开发商所持态度普遍过于乐观。而项目的规模和时间安排常常需要根据市场需求而调整，造成部分项目规模减小、被推迟或被取消。

“The purpose of project announcements is to attract interest from investors and potential customers. Therefore, what is announced usually exceeds what is actually built” says analyst Daniel Schaefer. “At the same time, we expect that about 2/3rd of the expansion projects included in our project pipeline will in fact get completed, with overall execution rates ranging from 40% for North Africa to about 70% for South East Asia and Oceania”

“这些项目公告的目的是为了吸引投资者和潜在客户的兴趣。”分析师 Daniel Schaefer 说道，“同时，我们预计《汇总》报告中所所有新扩建项目中的 2/3 最终会得以建成。按区域划分，北美地区的整体完成率为 40%，而东南亚及太平洋地区的完成率将达到 70%左右。”

Due to a number of reasons, container handling capacity has increased at a relatively constant level of 40 to 50 million TEU per year, largely exceeding demand growth. Reportedly about 300 projects consisting of 185 million TEU new capacity have been built during the last 4 years, whereas global container throughput increased by only 63 million TEU. As trade tensions grow and terminal utilization rates are overall low, terminal operators tend to be more hesitant regarding new terminal investments.

在多种因素影响下，过去几年集装箱装卸量一直在按照每年 4000-5000 万 TEU 的速度增长，大大超出了需求量的增长。据报道，过去 4 年共有总装卸能力达到 1.85 亿 TEU 的大约 300 个项目建成，而同时段全球集装箱实际吞吐量仅增长了 6300 万 TEU。随着全球贸易形势趋于紧张，码头利用率整体偏低，各码头运营企业对于新增码头投资的态度越来越谨慎。

DS Research therefore expects container handling capacity to develop more in line with demand. Container port demand is forecasted to increase by 210 million TEU (4.3% CARG) until

2023, whereas container handling capacity is projected to increase by 260 million TEU (3.4% CAGR) in the same period of time.

因此，DS Research 预计集装箱装卸能力的增长将更多与需求量看齐。据估计，从目前到 2023 年，集装箱吞吐需求量将增长 2.1 亿 TEU（年复合增长率 4.3%），而同时段集装箱装卸能力预计将增长 2.6 亿 TEU（年复合增长率 3.4%）。

Construction activities for specific regions and for terminal automation projects remain to be strong. Larger container terminal projects cluster at the US East Coast, the Mediterranean Sea, the Suez Canal, the Persian Gulf and the Strait of Malacca – moving away from Northern Europe and the Panama Canal. However, the majority of the listed projects are small or medium sized – about 75% of all projects scheduled for completion until 2023 include a capacity expansion of below 1 million TEU.

个别地区的建设力度以及码头自动化项目的势头依旧强劲。不过项目热点地区正在从北欧和巴拿马运河向其他区域转移，许多大型集装箱码头项目开始集中于美国东海岸、地中海沿岸、苏伊士运河、波斯湾地区以及马六甲海峡等地。不过，报告包含的多数项目都是中小规模——预计在 2023 年前完成的所有项目中，大约 75% 的项目集装箱装卸能力都在 100 万 TEU 以下。

“We have seen a definite trend where many global concessions are being let on the basis as a multi-purpose terminal, that means containers plus dry bulk or breakbulk facilities,” added Schaefer “and an increasing interest of international operators in these kind of facilities as well as in inland services.”

“我们看到多功能码头，也就是集装箱加干散货或散货设施的特许经营模式在全球各地正得到越来越多的青睐，” Schaefer 补充道，“国际运营商对此类设施以及内陆服务的兴趣正在增长。”

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“*Container Terminal Project Pipeline 2018*” is published by DS Research.

《2018年集装箱码头项目汇总》由DS Research出版。

The report is available - exclusively in English - from the website www.dsresearch.de

英文版报告可在以下网站下载：www.dsresearch.de

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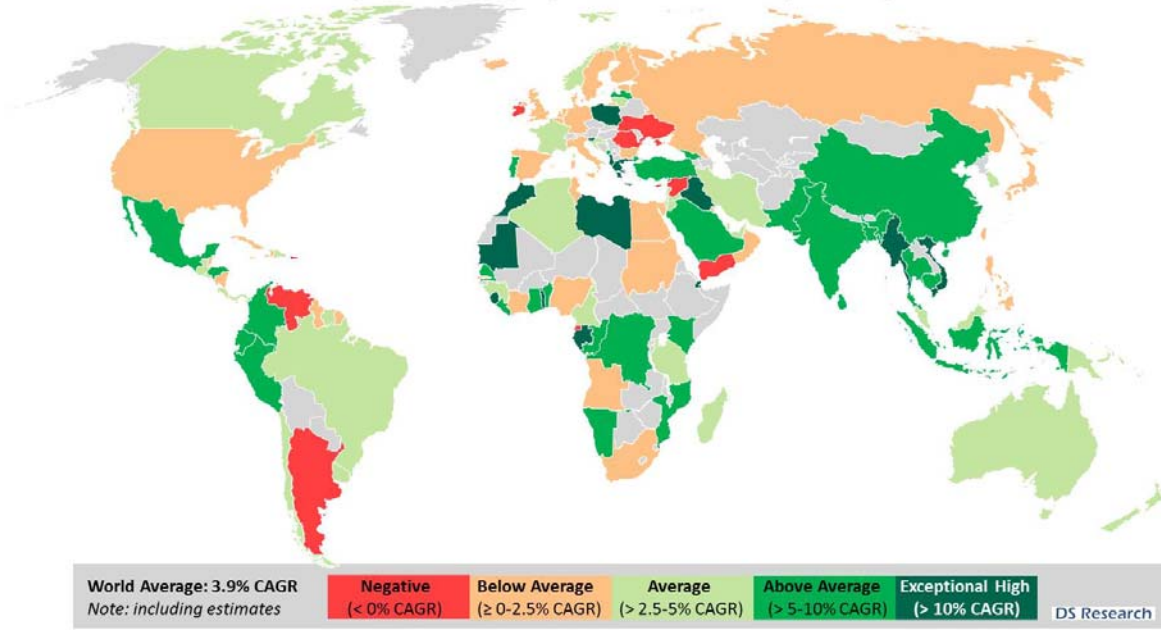
About DS Research

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DS Research is an independent provider of market research and analysis for the container terminal industry, established in 2014.

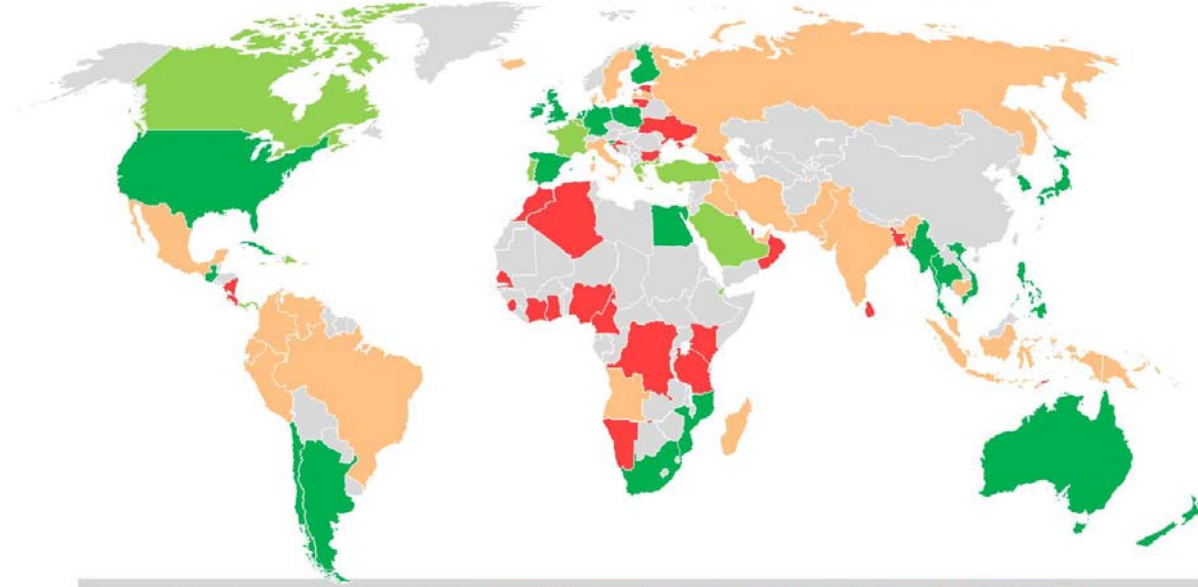
DS Research成立于2014年，是一家独立的集装箱码头行业市场研究和分析供应商。

Growth of container port throughput (TEU) since the financial crisis (2009-2017) in % CAGR



Growth of container port throughput (TEU) since the financial crises (2009-2017) in % CAGR	金融危机以来（2009-2017）全球集装箱港口吞吐量（TEU）增长情况，单位：% 年复合增长率
World average: 3.9% CAGR Note: including estimates	全球平均水平：3.9% 注：包括估计值
Negative (<0% CAGR)	负增长（<0% CAGR）
Below Average (≥ 0-2.5% CAGR)	低于平均水平（≥ 0-2.5% CAGR）
Average (>2.5-5% CAGR)	平均水平（>2.5-5% CAGR）
Above Average (>5-10% CAGR)	高于平均水平（>5-10% CAGR）
Exceptional High (>10% CAGR)	超高速增长（>10% CAGR）

Planned capacity expansions until 2023 (in % of 2017 container port throughput)



Amount of planned capacity expansions (TEU) compared to current container throughput (2017):

LOW (≤ 35%)	MEDIUM (> 35 - 55%)	HIGH (> 55 - 120%)	VERY HIGH (> 120%)	DS Research
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Planned capacity expansions until 2023 (in % of 2017 container port throughput)	到2023年国际集装箱装卸能力计划增长幅度（与2017年全球集装箱港口吞吐量对比）
Amount of planned capacity expansions (TEU), compared to current container Throughput (2017):	与目前（2017年）集装箱吞吐量相比，全球集装箱装卸能力（TEU）计划增长幅度
Low (≤ 35%)	低 (≤ 35%)
Medium (35 - 55%)	中 (35 - 55%)
High (55 - 120%)	高 (55 - 120%)
Very High (>120%)	特别高 (>120%)