

# CONTAINER TERMINAL PROJECTS 2024

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# ABOUT THE MARKET REPORT

The 9<sup>th</sup> edition of the market report focuses on upcoming container terminal projects scheduled for completion in 2024 and beyond. The main contribution of the report is a project list of future container terminal expansions and its analysis.

## Project Pipeline

The report provides a full list of announced projects, which target to supply additional container handling capacity (in Excel). Included are maritime container terminals and multi-purpose terminals. Main project details are provided for each project, such as current project status, scheduled year of completion, new capacity (in TEU), prospect of success, operator.

## Analysis

It is not unusual that project plans get adjusted to market demand, i.e. projects get delayed or cancelled. Therefore, **the report provides a reasonable projection of finally executed capacity expansions until 2028.**

The market report is comprehensive and meant to be scanned quickly. It includes nearly 100 pages, provided as a PDF, plus the project list in Excel. The price of the report is € 2'100.- for single-user and 2'500.-€ for multi-user.

For further information please refer to [www.dsresearch.de](http://www.dsresearch.de), or contact Daniel Schaefer, Phone: +49 (0) 171 6974549, [dschaefer@dsresearch.de](mailto:dschaefer@dsresearch.de)

# PROJECT PIPELINE

**Overall, we've listed 269 projects scheduled for completion from 2024 until 2028, 129 projects scheduled for completion beyond 2028 and 190 projects completed during the last 3 years. All projects combined represent a volume of 585 million TEU additional container handling capacity.**

**The project list is provided as an Excel table; the following project details are included:**

Prospect of success, Location (Country, Port, Terminal/ Project Name), Developer, Operator, Capacity (in TEU), Quay Line (in m), Berth Depth (in m), Investment type (greenfield, reconstruction, expansion, upgrade), Investment (in US\$), Status (under construction, announced, masterplan), Year of Completion, Comments, Sources – some details are estimated or partly provided.

## Project Pipeline:

SEQ No.	(Name) Country	(Name) Port	Prospect	(Name) Project / Terminal	(Company Name) Operator	(TEUm) Capacity	(in m) Quay	(in m) Berth Depth	Invest. Type	(US\$m) Invest.	Status	(Year) Completion	MPT	Autom
796	Indonesia	Bitung		Bitung Port (SEZ) - Phase 2 & 3	TBD	1.20	820		Greenfield		Delay / Cancel	2028+		
1167	Indonesia	Jayapura		Pelindo IV		0.05 e	150		Expansion		Completed	2022	Aug	
1168	Indonesia	Kendari		Kendari New Port Expansion		0.50 e	200		Greenfield		Deleted	2024		
269b	Indonesia	Kijing (West Kalimantan)		Kijing Terminal - Phase 1	Pelindo II	0.75	0		Upgrade		Masterplan	2028+		
269a	Indonesia	Kijing (West Kalimantan)		Kijing Terminal - Phase 1A (Initial)	Pelindo II	0.20	1,000	15.0	Greenfield	319	Construction	2024	e	
1322	New Zealand	Lyttelton				0.12			Expansion	75	Completed	2023		
908	New Zealand	Napier		Wharf 6 expansion		0.05 e	350	13.0	Expansion		Completed	2022		X
1320	New Zealand	Tauranga		Sulphur Point		0.30 e	285		Expansion	69	Masterplan	2026	e	(X)
1321	New Zealand	Whangarei		Northport New Container Terminal		0.45	270		Greenfield		Masterplan	2028+	e	
789	Pakistan	Gwadar		CPEC - Phase II	COPHC (China Overseas Ports Hold. Comp.)	1.20 e	2,700	14.5	Greenfield		Delay / Cancel	2025		X
1407	Pakistan	Karachi		Karachi Gateway Terminal Limited (KGTL)		1.00 e			Reconstr.		Announced	2026		
1075	Pakistan	Karachi		Qasim International Container Terminal	DP World Karachi	0.20 e	50		Upgrade	80	Completed	2021		
913a	Pakistan	Karachi		SAPT - Phase 2	HPH, South Asia Pakistan Terminals (SAPT)	0.70 e	750	18.0	Expansion		Completed	2023		X
913b	Pakistan	Karachi		SAPT - Phase 2	HPH, South Asia Pakistan Terminals (SAPT)	1.20 e		18.0	Upgrade		Construction	2025	e	X
791	Pakistan	Karachi		SAPT - Phase 3-5	HPH, South Asia Pakistan Terminals (SAPT)	4.00 e		18.0	Greenfield		Masterplan	2028+		X
1408	Papua New Guinea	Kimbe		Kimbe Port		0.05 e			Upgrade		Announced	2027	e	X
865	Papua New Guinea	Lae		Lae Port - East Tidal Basin Stage 2	ICTSI	0.14	240	12.0	Upgrade		Completed	2023		X
324	Philippines	Cebu		Cebu International Container Terminal (CICT) - Phase I		0.50	500	12.0	Greenfield	199	Announced	2024		
1409a	Philippines	Cebu		Cebu South Harbor & Container Terminal Complex		0.10 e		11.0	Greenfield		Completed	2023		X
1409b	Philippines	Cebu		Cebu South Harbor & Container Terminal Complex		0.30 e		11.0	Upgrade		Construction	2025	e	
808	Philippines	Davao		DICT - Phase 2		0.20 e	150		Greenfield	50	Completed	2023		

Project delays are not uncommon. Therefore, prospects for project completion are rated per project and per country/region, taking into account historical and projected container terminal throughput, as well as past capacity additions.

The analysis part of the report includes:

- review and forecast of container throughput and container handling capacity until 2028
- sum-up of the project pipeline
- announced projects vs. project execution
- supply/demand assessment per region
- terminal automation



