

CONTAINER TERMINAL FORESIGHT

ISSUE 2025



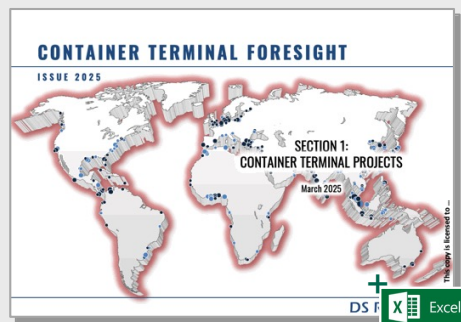
SECTION 1: Container Terminal Projects

SECTION 2: Container Handling Equipment

@ March 2025
by DS Research

BROCHURE

“Container Terminal Foresight - Issue 2025” includes a detailed assessments of upcoming container terminal projects, as well as the container handling equipment market. The market report is subdivided into two separate sections:

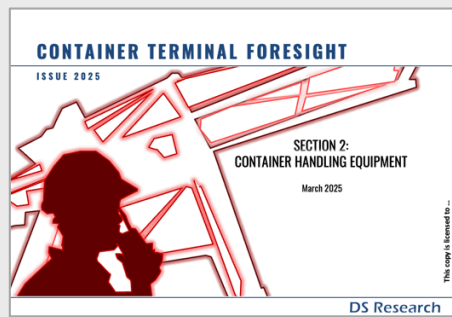


Section 1: Container Terminal Projects

(88 pages, PDF file + project list, Excel file)

This section provides information on all future container terminal projects.

The main contribution of this section is a global project list of almost 500 future container terminal and multi-purpose terminal projects, as well as an outlook on project execution.



Section 2: Container Handling Equipment

(129 pages, PDF file)


This section provides a classical market analysis on the CHE equipment market – accounting for US\$ 7.5bn average annual sales in 2022-2024 – and gives a reasonable market outlook until 2029, including terminal automation. All major types of machinery employed with container handling are included.

The market report targets at a clear visual presentation based on factual information. It includes over 200 pages provided in PDF format, plus an Excel project list. The price of the market report starts at € 4'000.- for both section and € 2'500.- for one section.

SECTION 1 – CONTAINER TERMINAL PROJECTS (EXCEL)

Nearly 500 future container/multipurpose terminal projects are listed. The project list – provided as an Excel spreadsheet – contains information on various project details, in particular:

- project size, in terms of additional container handling **capacity** (TEU p.a.),
- current **project status** (e.g. under construction, announced, masterplan),
- **type of investment** (e.g. greenfield site, reconstruction, expansion),
- scheduled **year of completion**,
- **prospect** to get executed,
- ... further project details; comments on the project; sources of information.

Prospect	SEQ No.	Coutry & Port (Name)	Project / Terminal (Name)	Operator / Sharehold. (Company Name)	Capacity (TEUm)	Quay (in m)	Investment (US\$m)		Status	Completion (Year)	MPT	Auto	
Pakistan													
	789	Gwadar	CPEC - Phase II	COPHC (China Overseas Ports Holding Company Pakistan)	1.20 e	2,700	Greenfield		Delay / Cancel	2025	X		
	1407	Karachi	Karachi Port East Wharf, Berths 6-9	AD Ports	1.00 e		Reconstr.		Announced	2026			
	913b	Karachi	- Simplified project list -	HPH, South Asia Pakistan Terminals (SAPT)	0.60 e		Upgrade		Completed	2023		X	
	913c	Karachi			se 2	0.60 e		Upgrade		Announced	2027 e		X
	791	Karachi			se 3-5	4.00 e		Greenfield		Masterplan	2029+		X
Papua New Guinea													
	1408	Kimbe	Kimbe Port	PNG Ports Corporation Limited	0.05 e		Upgrade		Announced	2027 e	X		
	865	Lae	Lae Port - East Tidal Basin Stage 2	ICTSI	0.14	240	Upgrade		Completed	2023		X	
Philippines													
	1506a	Batangas	Luzon International Container Terminal (LICT)	ICTSI	0.50 e		Expansion		Announced	2027			
	1506b	Batangas	Luzon International Container Terminal (LICT)	ICTSI	1.50 e		Expansion		Masterplan	2029+			
	324	Cebu	Cebu International Container Terminal (CICT) - Phase I	International Container Terminal Services, Inc. (ICTSI)	0.50	500	Greenfield	199	Announced	2028			
	1409a	Cebu	Cebu South Harbor & Container Terminal Complex		0.10 e		Greenfield		Completed	2023	X		
	1409b	Cebu	Cebu South Harbor & Container Terminal Complex		0.20 e		Upgrade		Construction	2025 e			
	808	Davao	DICT - Phase 2		0.20 e	150	Greenfield	50	Completed	2023			
	1078	Iloilo	Visayas Container Terminal (VCT)	ICTSI	0.10 e		Expansion	80	Construction	2028			
	1312	Manila	MICT, Berth 8	ICTSI	0.50 e	400	Expansion		Construction	2027			
	1079	Manila	MICT, Berth 9 & 10	ICTSI	0.20 e		Greenfield		Masterplan	2029+			
	1178	Manila	North Harbour, Berth 1-5	ICTSI	0.10 e		Upgrade		Completed	2023			
	1177	Manila	South Port	Asian Terminals Inc	0.25		Expansion		Completed	2022			

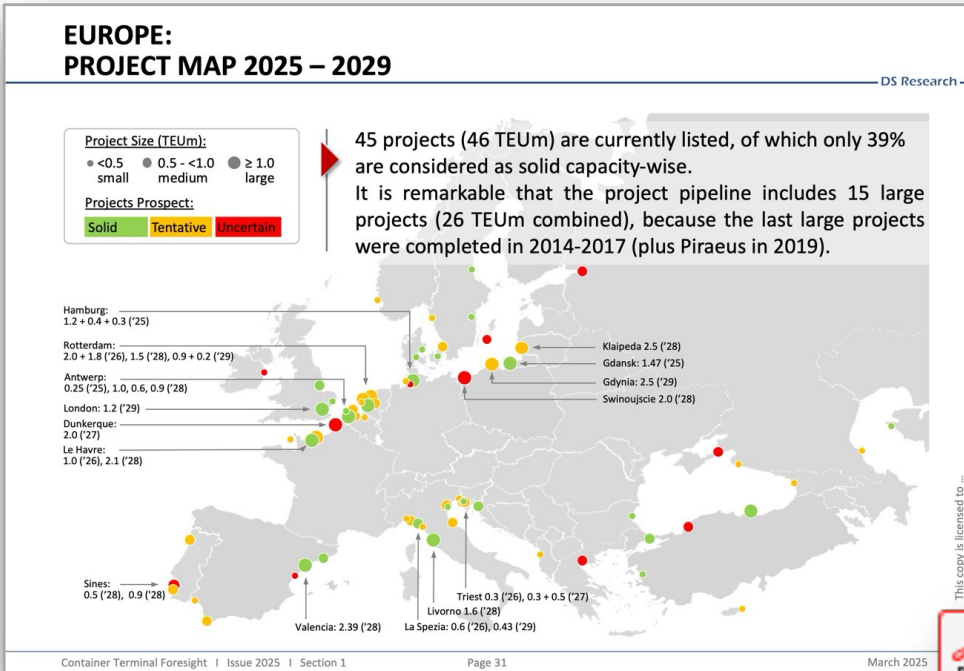
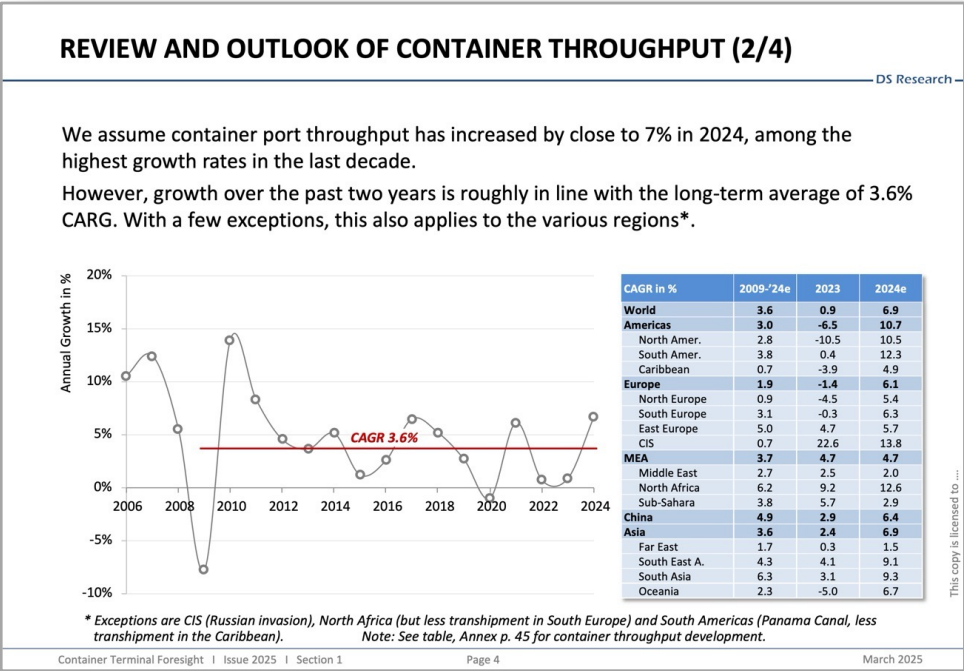


SECTION 1 - CONTAINER TERMINAL PROJECTS (PDF)

This section of the market report includes a description and an assessment of the project pipeline. It is intended to provide an overview of which container terminals are planned where, when they are scheduled for completion and what the prospects of realization are.

Chapter 1: “Container Terminal Project Pipeline”, takes a look at the project pipeline with regard to past and expected future capacity expansions at maritime ports. The chapter ends with the prospect of the project pipeline to get implemented.

Chapter 2: “Analysis by World Region” provides an assessment on a regional level, including a review and forecast of container throughput, and the amount of projects considered to get finally executed per region.



SECTION 2 – CONTAINER HANDLING EQUIPMENT (PDF)

This section contains a classical market analysis of container handling equipment, including a review and outlook per type of equipment.

Types of equipment include:

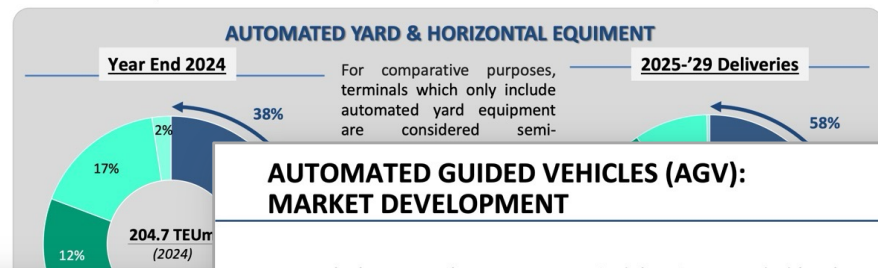
STS, MHC, RTG, RMG, ASC, ARTG, straddle carriers, reachstackers, ECH, FCH, terminal tractors, AGV, ATT.

Core findings refer to:

- Market size, unit sales
- Regional distribution
- Competitors, market shares
- Operating fleet, replacement demand
- Market outlook for each type of equipment until 2029
- Terminal automation, review & outlook

EXECUTIVE SUMMARY: TERMINAL AUTOMATION (3/4)

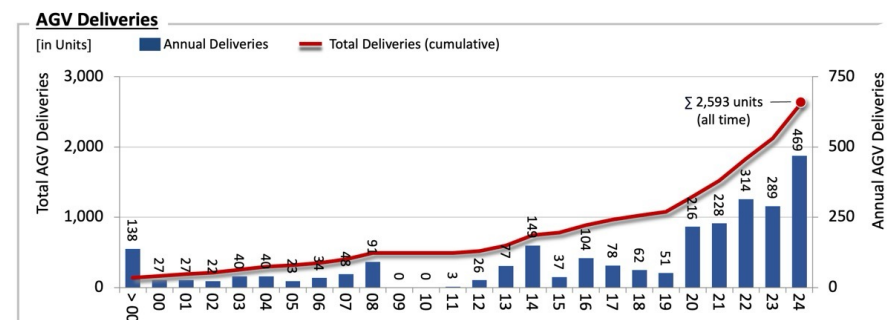
It is also evident that automated horizontal transport equipment will get increasingly employed. We estimate that 58% of future automation projects will include automated horizontal transport.



AUTOMATED GUIDED VEHICLES (AGV): MARKET DEVELOPMENT

In total, there are close to 2,600 unit deliveries recorded by the end of 2024, of which close to 1,100 units (>40% of all machines) have been delivered during the last 3 years (2022-'24).

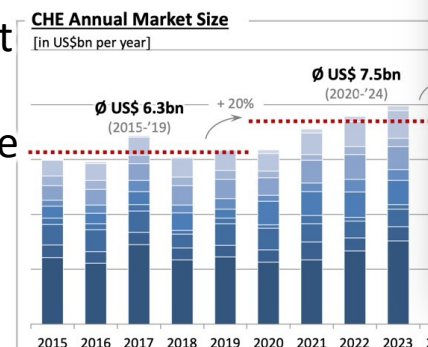
The market has been driven by a steady pipeline of new, fully automated container terminal projects, particularly in China. We estimate, that approximately 500 units have already been ordered for the next 2 years, and that final future deliveries will exceed this number.



EXECUTIVE SUMMARY: CHE MARKET FORECAST 2029 (2/3)

The CHE market* is has grown from average over the past 5 years and is expected to reach

The precondition/key assumption for the forecast is a 3-4% p.a. container throughput growth.



* CHE market refers to OEM sales, excluding revenues for spare parts, transport, service, refurbishments, sales to the secondary market, etc.



ORDER FORM

CONTAINER TERMINAL FORESIGHT - Issue 2025

ORDER FORM

Please complete and return by email /or by post to:

DS Research
Bleiberg 9
D-01665 Klipphausen
GERMANY
Email: dschaefer@dsresearch.de
Phone: +49 (0) 171 69 745 49

We order the following sections of the market report “Container Terminal Foresight / Issue 2025”:

- ☐ Section 1: Container Terminal Projects
- ☐ Section 2: Container Handling Equipment

- ☐ Single-user license (one authorized user)
- ☐ Multi-user license (multiple users)

Price (ex. VAT) according to the number of sections ordered and users/type of license:

	Single-user	Multi-user
One Section	2500.- €	3000.- €
Two Sections	4000.- €	4500.- €

We will arrange payment by direct bank transfer to:

Account: DS Research
Bank: Deutsche Bank
IBAN: DE17 8707 0024 0050 3235 00
BIC/SWIFT: DEUTDE33HAN

Name: _____

Company: _____

Address: _____

Phone: _____

Email: _____

VAT No. (EU only): _____

Please state your VAT registration number, if you are ordering from a European Union country.

Signature:.....

Date: