



Average Container ship size for “calls” in North America in the 1st Quarter of 2017 was 1551 TEUs. See next Page.

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Average cargo discharge size jumps double digits

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Behemoths of more than 10,000 TEU are increasingly common in ports worldwide.

The amount of cargo discharged at terminals around the world is on the rise as more high-capacity ships [enter the global market](#), further increasing pressure on the processes and infrastructure of container terminal operators.

The global average call size in the first quarter of 2017 rose 12.6 percent year-over-year to 1,076 containers, according to data supplied to IHS Markit by the world's largest container ship operators. Ships with capacity larger than 10,000 TEU accounted for

10.7 percent of port calls in the first quarter, up from 8.5 percent in the same period the previous year, according to the data, which covers 879 terminals in close to 500 ports globally.

With the exception of Africa, call sizes rose in all major world regions, with the biggest increases registered in Southeast Asia (up 19.2 percent), Latin America (up 17.1 percent), and North America (up 17 percent).

The data covers the operations of larger container lines that account for more than 75 percent of global fleet capacity and more than 95 percent of global capacity in the vessel range larger than 4,000 TEU.

Almost all major regions showed an increase in the number of calls by ships larger than 10,000 TEU, with North Asia showing the biggest increase in the category. Vessels in the 10,000-to-14,000-TEU category accounted for around 7 percent of global calls in the first quarter, while those greater than 14,000 TEU accounted for around 3.7 percent of global calls, the data show.

The vast majority of calls were made by ships that are below 5,400 TEU in capacity.

[At 1,731 TEU, average call sizes were largest in the Middle East and India, followed by North America (1,551) and East Asia (1,124). The global average call size was 1,076 TEU in the first quarter, 12.6 percent larger than the same period of 2016.]

These growing ship sizes are increasing the already substantial pressure on terminal operators to upgrade facilities and processes to handle larger vessels.

The current order book is around 14 percent of existing fleet capacity and 80 percent of it is for vessels larger than 10,000 TEU in size, according to IHS Markit.

The first half of the year saw the delivery of 26 ships of more than 14,000 TEU capacity, with a dozen more expected to join the fleet in the coming months, according to industry analyst Alphaliner.

Although France-based CMA CGM recently ordered nine 22,000-TEU vessels [from Chinese yards](#), the industry appears to be taking a cooler approach to ordering large ships.

Maersk Line CEO Soren Skou said the line had no plans to order new mega vessels before 2019.

“The order book is currently 13 percent of the fleet and the run-off is fast. If no more orders are made it will be 7 percent by the end of 2018 and 1 percent in 2019, which is quite a positive outlook for supply for the industry,” Skou said in a recent call to discuss second-quarter earnings.

“From where I am sitting it is important to consider that there is no incentive to order ships from a cost perspective. Maybe 3 to 5 years ago large ships were ordered because of fuel economics, but given the current prices that has now minimized.” The global average price per ton of IFO 380 bunker fuel fell 18.5 percent year-over-year in 2016 to \$229, according to IHS Markit.

“The charter market is also [in the doldrums](#), so buying ships rather than chartering them is a hard case to make,” Skou said. “I do think that additions to the order book will be driven by the need to grow capacity to meet market demand and nothing else. No large ships have been ordered since the third quarter of 2015 and we don’t have any ambitions to order new large ships this year or next year.”

Global container fleet capacity stood at 20.6 million TEU at the end of the second quarter, an increase of 1.4 percent compared with the same quarter last year.

However, adjusting for the decline in the idle fleet from 4.6 percent to 2.6 percent of global nominal capacity, the offered capacity grew in line with container demand growth at about 4 percent, Maersk said.

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