# North Range ports' hinterland traffic exceeding 25 million TEU in 2011

**Thanks to the robustness of the German economy, hinterland traffic was less affected by the crisis than feeder traffic. In a long-term perspective, the Central and Eastern European economies still show the highest growth potential and are subject to harsh competition between the North Range ports, as latest results from ISL's North European Container Traffic Model show.**

Central and Eastern Europe - most notably Poland and Russia - have been eyed by ports in the North Range as key growth markets in the recent past. Container traffic in these regions has been growing quickly during the past two decades and their share in the major North Range ports' container traffic reached 10% in 2010.[1] The share of feeder traffic as opposed to hinterland traffic is particularly high for these regions, which means that containers have to be moved twice between ship and shore. Accordingly, Central and Eastern Europe was slightly more important for total quayside handling (14%). These shares would have been higher, hadn't it been for Maersk's rearranged AE10 Far East service, which is now also calling in Gdansk and hence reducing the volume of boxes transhipped in the North Range ports.

During the past years, there was harsh competition for transhipment between the North Range ports and the Baltic Sea and Northern Europe. After a noticeable market share shift from German ports to Dutch and Belgian ports in 2009 and 2010, transhipment volumes started to move back to Germany in 2011. In 2010, Bremen/Bremerhaven was the most important feeder port for the Baltic Sea. Hamburg - which was by far the largest feeder port in Northern Europe before the crisis - followed closely.

Next to feeder traffic, intra-European shortsea trade via North Range ports is also increasing. In this segment, traffic between the continent and the British Isles is dominant, but shortsea trade between Western Europe and Russia is increasing strongly.

Despite the particular dynamics in Central and Eastern Europe, Germany is by far the most important country for the North Range ports with 9.2 million TEU of hinterland traffic in 2010 - more than one in three containers moved between the North Range ports and their hinterland by barge, rail or truck. Currently, the six major continental North Range ports handle more than 95% of Germany's containerised trade. Mediterranean ports like Genoa or Koper are still of negligible importance, while smaller ports in the North Range mostly focus on niche trades.

The total container traffic of the major North Range ports has reached 37.3 million TEU in 2010, still about two million TEU short of the 2008 results. According to latest data from the Global Port Tracker - North Europe Edition, the volume increased to around 40 million TEU in 2011 - a new all-time high. Hinterland traffic probably reached more than 25 million TEU for the first time, most notably thanks to the solid performance of the German economy throughout the year.

[1] Ports included are: Rotterdam, Hamburg, Antwerp, Bremen/Bremerhaven, Le Havre and Zeebrugge

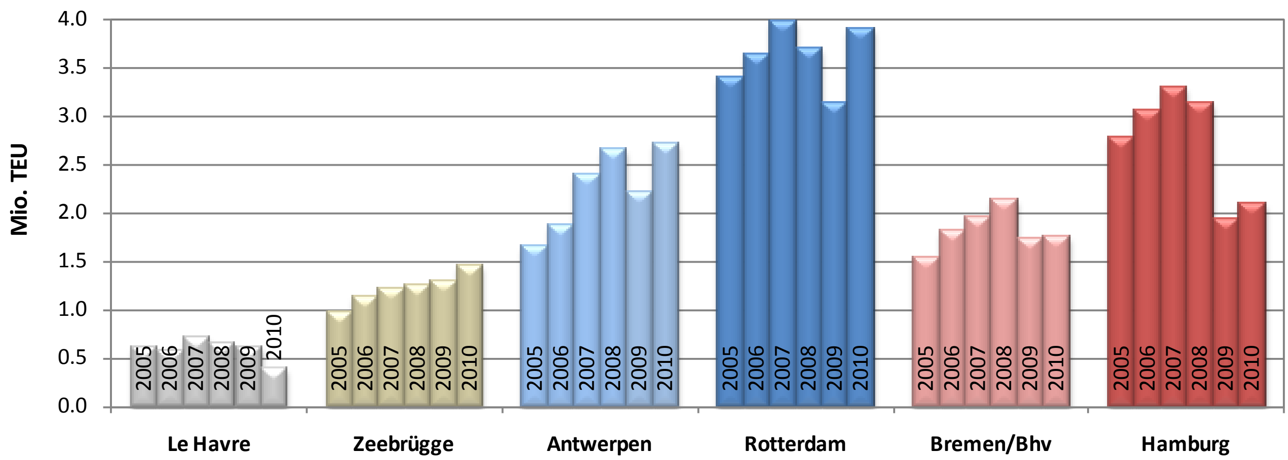
**Table: Handling volumes of North Range Ports 2008-2011**

Million TEU

| | 2008 | 2009 | 2010 | 2011* | '11/10 |
|---|---|---|---|---|---|
| Hamburg | 9.7 | 7.0 | 7.9 | 9.2 | +16.4% |
| Bremen/Bremerhaven | 5.5 | 4.6 | 4.9 | 5.9 | +19.9% |
| Rotterdam | 10.8 | 9.7 | 11.1 | 12.1 | +8.3% |
| Antwerp | 8.7 | 7.3 | 8.5 | 8.6 | +2.1% |
| Zeebrugge | 2.2 | 2.3 | 2.5 | 2.2 | -10.9% |
| Le Havre | 2.5 | 2.2 | 2.4 | 2.3 | -2.3% |
| **Total** | **39.4** | **33.2** | **37.3** | **40.3** | ***+8.2%*** |
| *Total growth* | *+2.4%* | *-15.7%* | *+12.2%* | *+8.2%* | |

Source: ISL 2011, * Forecast based on Global Port Tracker

**Graph: Total shortsea traffic of major North Range ports 2005-2010**




Source: ISL Shortsea Traffic Model 2011

***ISL Shortsea Shipping and Hinterland analysis of the Hamburg - Le Havre Range 2008/2010*** and ***Global Port Tracker - North Europe Trade Outlook*** are available in the Webshop of ISL InfoLine (www.infoline.isl.org):

http://www.infoline.isl.org/index.php?module=zWebstore&func=detail&id=101
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