

MARITIME TRADE REVIEW 2014

1.0 COMPARISON OF CARGO THROUGHPUT 2014 AND 2013

Table 1 shows the summary of seaborne trade comparison between for 2013 and 2014.

Cargo throughput for 2014 decreased by 13.84% compared to 2013. Total import and export trade volume for 2014 decreased by 14.24% compared to 2013. Total transit/transshipment trade volume for 2014 decreased by 5.69% over 2013.

Table 1 SUMMARY COMPARISON OF GHANA'S CARGO THROUGHPUT 2014 AND 2013			
TRADE TYPE	2014 (mt)	2013 (mt)	CHANGE
TOTAL IMPORT & EXPORT	15,184,565	17,705,000	-14.24%
TOTAL TRANSIT/TRANSH.	805,354	853,924	-5.69%
CARGO THROUGHPUT	15,989,919	18,558,924	-13.84%

2.0 PORTS SHARE OF CARGO THROUGHPUT FOR 2014

Cargo throughput for the seaports of Ghana (i.e. Tema and Takoradi) for 2014 was about 18.60 million metric tons (mt). Cargo throughput for the Port of Tema was 12.2 million mt representing 76.4% of the total, whilst the Port of Takoradi recorded 3.8 million mt, representing 23.6% of the total seaborne trade.

Transit/Transshipment imports amounted to 779,855mt, whilst transit/transshipment exports recorded 25,499mt. Table 1 below shows the summary performance for the review period.

Table 2.SUMMARY OF GHANA'S SEABORNE TRADE (in mt) 2014					
PORT	IMPORT (mt)	TRANSIT/ TRANSH. IMPORT (mt)	*EXPORT (mt)	TRANSIT/ TRANSH. EXPORT (mt)	TOTAL (mt)
TEMA	9,612,541	764,297	1,806,829	25,499	12,209,166
TAKORADI	1,188,374	15,558	2,576,821	0	3,780,753
TOTAL	10,800,915	779,855	4,383,650	25,499	15,989,919

* Exports exclude Ghana's crude oil exports

3.0 COMPARISON OF GHANA'S SEABORNE TRADE for 2014 AND 2013 PER CARGO TYPE

3.1 IMPORT TRADE

Total imports for 2014 was 10.8 million mt. This comprised 4.0 million mt of Liner cargo, 2.0 million mt of Break bulk, 2.8 million mt of Dry bulk cargo and 2.0 million mt of Liquid bulk imports.

In Table 3 below, it can be seen that imports for 2014 decreased by 14.91% over 2013. For the trade types, there was a decline in Liner imports by 17.37%. Break bulk imports decreased by 3.51%, Dry bulk imports increased by 7.53% and Liquid bulk imports also increased by 30.96%.

Table 3 COMPARISON OF GHANA'S SEABORNE TRADE PER CARGO TYPE			
TRADE TYPE	2014 (mt)	2013 (mt)	Change
IMPORT:			
Liner	3,966,118	4,799,603	-17.37%
Break Bulk	2,014,102	1,945,842	3.51%
Dry Bulk	2,819,056	3,048,640	-7.53%
Liquid Bulk	2,001,639	2,899,315	-30.96%
TOTAL IMPORT	10,800,915	12,693,400	-14.91%
EXPORT:			
Liner	1,581,219	1,562,062	1.23%
Break Bulk	473,966	308,908	53.43%
Dry Bulk	2,291,502	3,055,044	-24.99%
Liquid Bulk	36,963	85,586	-56.81%
TOTAL EXPORT	4,383,650	5,011,600	-12.53%
TOTAL IMPORT & EXPORT	15,184,565	17,705,000	-14.24%

3.2 EXPORT TRADE

The total export trade volume for 2014 was 4.4 million mt. This represents 14.24% decrease below 2013. This was made up of 1.58 million mt of Liner items, 473,966 mt of Break bulk items, 2.29 million mt of Dry Bulk and 36,963 mt of Liquid Bulk.

4.0 PERFORMANCE IN LADEN CONTAINERS

Table 4 below shows the details of the performance in laden containers for 2014. Total Laden Containers for

imports and exports for 2014 was 490,828 TEUs. This represents a decrease of 11.99% compared to 2013.

Total import Laden Containers for 2014 was 376,166 TEUs; a 14.57% decrease compared to 2013. Total export Laden Containers for 2014 was 114,662 TEUs; representing a decline of 2.31% compared to 2013.

Table 4 GHANA'S SEABORNE TRADE IN LADEN CONTAINERS (in TEUs) PER PORT				
TRADE TYPE	PORT	2014 (in TEU)	2013 (in TEU)	CHANGE
IMPORT	TEMA	364,399	425,120	-14.28%
	TAKORADI	11,767	15,225	-22.71%
	TOTAL IMPORT	376,166	440,345	-14.57%
EXPORT	TEMA	95,113	100,911	-5.75%
	TAKORADI	19,549	16,457	18.79%
	TOTAL EXPORT	114,662	117,368	-2.31%
TOTAL	IMPORT/EXPORT	490,828	557,713	-11.99%

5.0 DIRECTION OF GHANA'S SEABORNE TRADE

5.1 Import Trade

Table 5 and Figure 1 below show that majority of Ghana's seaborne imports for the period 2014 came from the Far East range, representing about 36% of the total import trade. North Continent was next with 17% share of Ghana's import trade. Imports from Africa were 1,306,531 mt, a decrease of 1,636,410 mt (or 55.60%) over the previous year's figure of 2,942,941 mt. The major commodities imported from the Africa Range which experienced significant increases were Crude Oil, LPG and Petroleum Products. Liquid Bulk Imports from Africa showed a decrease of 653,275 mt (i.e. 41.7%) below the previous year's figure of 1,566,786 mt.

Table 5.DIRECTION OF GHANA'S SEABORNE IMPORT TRADE (in mt)

2014								
Trade Type	UK	N. Cont.	Med. Eur	N. Amer	F. East	Africa	Others	TOTAL
LINER	145,060	527,687	356,848	242,493	1,770,594	506,773	416,662	3,966,117
BREAK BULK	243,326	105,499	41,905	29,165	1,197,709	60,891	335,607	2,014,102

DRY BULK	186	386,602	1,194,017	229,269	895,874	85,592	27,518	2,819,058
LIQUID BULK	15,905	763,004	44,196	186,261	68,759	653,275	270,239	2,001,639
TOTAL	404,477	1,782,792	1,636,966	687,188	3,932,936	1,306,531	1,050,026	10,800,916
SHARE	4%	17%	15%	6%	36%	12%	10%	100%

5.2 Export Trade

The 4.38 million mt of seaborne exports for 2014 went to various destinations in the world. Majority of these exports went to the Far East and the North Continent ranges. The Far East range received a total of 2,400,232 mt (i.e. 54.8% of total exports) whilst the North Continent range received a total of 738,845mt (or 16.9% of total exports). Table 6 below gives more details about the direction of Ghana's seaborne export trade for 2014.

Table 6 DIRECTION OF GHANA'S SEABORNE EXPORT TRADE (in mt)

2014								
Trade Type	UK	N. Cont.	Med. Eur	N. Amer	F. East	Africa	Others	TOTAL
LINER	68,169	352,395	192,425	83,396	599,830	147,286	137,718	1,581,219
BREAK BULK	210	2,561	1,740	12,502	417,005	2,435	37,513	473,966
DRY BULK	36,000	372,564	11,041	0	1,383,397	0	488,500	2,291,502
LIQUID BULK	0	11,325	969	0	0	24,669	0	36,963
TOTAL	104,379	738,845	206,175	95,898	2,400,232	174,390	663,731	4,383,650
SHARE	2.4%	16.9%	4.7%	2.2%	54.8%	4.0%	15.1%	100.0%

6.0 TRANSIT TRADE AND TRANSSHIPMENT THROUGH THE SEAPORTS OF GHANA

Total Transit/Transshipment trade volume for 2014 shows a decrease of 5.7% compared to 2013. Total volume of transit/transshipment for 2014 was 805,354 metric tons (mt).

Transit/Transshipment Imports for 2014 amounted to 779,855 mt, a decrease of 4.59% compared to 2013.

Transshipment/Transit Exports recorded 25,499 mt in 2014, a decrease of 30.1% compared to 2013. Table 7 below shows the details of the transit/transshipment trade volumes for the review period.

Table 7 SUMMARY COMPARISON OF TRANSIT TRADE AND TRANSHIPMENT THROUGH THE SEAPORTS OF GHANA 2014 AND 2013			
TRADE TYPE	2014 (mt)	2013 (mt)	CHANGE
TRANSIT/TRANSH. IMPORT	779,855	817,340	-4.59%
TRANSIT/TRANSH. EXPORT	25,499	36,484	-30.11%
TOTAL	805,354	853,824	-5.68%

7.0 TRANSIT TRADE PERFORMANCE FOR BURKINA FASO, MALI AND NIGER

Total transit volume for the three (3) landlocked countries of Burkina Faso, Mali and Niger amounted to 588,326 mt in 2014. This represents a decline of 17.3% compared to 2013. The transit trade comprises imports of 569,010 mt and exports of 19,316 mt for 2014.

Major transit trade commodities included Bagged Fertilizer, Processed Foods/ Beverages and Cashew nuts. Details are shown in Table 8.

Table 8 SUMMARY COMPARISON OF TRANSIT TRADE for BURKINA FASO, MALI & NIGER 2014 AND 2013

TRADE TYPE	2014 (mt)	2013 (mt)	Change
TRANSIT IMPORT	569,010	679,903	-16.31%
TRANSIT EXPORT	19,316	31,795	-39.25%
TOTAL	588,326	711,698	-17.33%

8.0 SHIPPING LINE PERFORMANCE IN GHANA'S SEABORNE TRADE

8.1 Shipping Line Performance in the Containerized Trade

Forty One (41) Shipping Lines were involved in the containerized cargo trade which amounted to 487,823 TEUs for the review period Jan-Dec. 2014. The highest operators were Maersk Line, with 133,420 TEUs (27.35% of the container trade) and Mediterranean Shipping Company (MSC), with 56,059 TEUs (11.49%).

8.2 Performance of Shipping Lines per Volume of Shipment and Trade Type

A total of one hundred and twenty (120) Shipping Lines and Charterers participated in transporting the over 15.2 million mt of Ghana's seaborne cargo (import & export) through the Ports of Tema and Takoradi during Jan-Dec. 2014.

9.0 PERFORMANCE OF SHIPPING AGENTS IN GHANA SEABORNE TRADE

9.1 Shipping Agents' Performance in the Containerized Trade

Thirty one (31) Shipping Agents were involved in the containerized trade to and from Ghana. Together, they handled 490,827 TEUs for the review period Jan-Dec. 2014. The highest performing agencies were Maersk Ghana Ltd, with 132,897TEUs (27.08% of the containerized trade) and MSC, with 56,0591TEUs (11.42% of the containerized trade).

9.2 Performance of Shipping Agents per Volume of Shipment and Trade Type

Seventy Three (73) Shipping Agents handled over 15.2million mt of seaborne trade (import & export) through the Ports of Tema and Takoradi during the period Jan-Dec. 2014.

PERFORMANCE OF SHIPPING LINES PER LADEN CONTAINERS (in TEUs)

TOTAL (TEMA & TAKORADI)

2014				
SHIPPING LINE	IMPORT	EXPORT	TOTAL	% of TOTAL
ADVANCED MARITIME	13	12	25	0.01%
AFRICA EXPRESS LINE	1,220	225	1,445	0.30%
ARKAS LINE	7,572	2,102	9,674	1.98%
AFRITRAMP	3	2	5	0.00%
AKY	5	0	5	0.00%
BAJ FREIGHT	5	0	5	0.00%
BOLLORE AFRICA LTD	144	40	184	0.04%
CHINA OCEAN SHIPPING	9,088	1,642	10,730	2.20%
CHINA SHIPPING	10,216	1,143	11,359	2.33%
CMA CGM	9,599	7,390	16,989	3.48%
CSAV		2	2	0.00%
DELMAS	15,770	5,744	21,514	4.41%
EAGLE WEST AFRICA SERV.	3,045	723	3,768	0.77%
EVERGREEN SHIPPING	18,130	1,812	19,942	4.09%
GLOVIS	0	48	48	0.01%
GMT	4	0	4	0.00%
GOLD STAR LINE	16,471	10,754	27,225	5.58%
GRIMALDI LINES	10,315	2,783	13,098	2.68%
HANJIN SHIPPING	17,548	4,186	21,734	4.46%
HAPAG-LLOYD	14,104	4,915	19,019	3.90%
HC TRADING	77	23	100	0.02%
HOEGH AUTOLINERS	14	0	14	0.00%
I.M.T	0	40	40	0.01%
MAERSK LINE	110,558	22,862	133,420	27.35%
MEDITERRANEAN SHIPP. CO	42,776	13,283	56,059	11.49%
MESSINA LINES	938	730	1,668	0.34%

mitsui o.s.k. lines	26,848	4,601	31,449	6.45%
NILEDUTCH		376	376	0.08%
NMT LINES	1,168	0	1,168	0.24%
NORDANA LINES	76	0	76	0.02%
NYK	5,467	1,850	7,317	1.50%
OTHER	3,472	334	3,806	0.78%
PACIFIC INTL. LINE	37,750	10,200	47,950	9.83%
SAFMARINE MPV N.V	6	9,890	9,896	2.03%
SINOHYDRO	54	0	54	0.01%
SPLIETHORFF	1	0	1	0.00%
TOTAL	8	0	8	0.00%
UNSPECIFIED	237	0	237	0.05%
UNITED ARAB SHIPP. CO	10,550	3,787	14,337	2.94%
UNIVERSAL AFRICA LINE	111	158	269	0.06%
VITOL S.A.	39	0	39	0.01%
ZIM LINE	2,764	0	2,764	0.57%
TOTAL	376,166	111,657	487,823	100.00%

PERFORMANCE OF SHIPPING AGENTS PER LADEN CONTAINERS (in TEUs) TOTAL (TEMA & TAKORADI)				
2014				
SHIPPING AGENT	IMPORT	EXPORT	TOTAL	% SHARE
ADVANCE MARITIME	13	12	25	0.01%
ANTRAK GHANA LTD	9,595	2,646	12,241	2.49%
BAJ FREIGHT	5	0	5	0.00%
BEACON SHIPPING GHANA	17,548	0	17,548	3.58%
BLUE FUNNEL GHANA	8,082	0	8,082	1.65%
BOLLORE AFRICA LOGISTICS	0	1,762	1,762	0.36%
DELMAS SHIPPING GH. CMA CGM	25,358	13,134	38,492	7.84%
DW CABLE NET SHIPPING GH LTD	62	0	62	0.01%
GETMA GHANA LTD	6	0	6	0.00%
GMT SHIPPING LTD	22	0	22	0.00%
GRIMALDI GHANA LTD	10,137	2,592	12,729	2.59%
HULL BLYTH GHANA	70	10,370	10,440	2.13%
HELP MARINE	398	0	398	0.08%
INTERMODAL SHIPPING AGENCY GH	19,235	13,759	32,994	6.72%
MACRO SHIPPING	133	158	291	0.06%
MAERSK GHANA LTD	110,035	22,862	132,897	27.08%
MOL GHANA LTD	26,848	4,601	31,449	6.41%
MSCA GHANA	42,776	13,283	56,059	11.42%
NAVITRANS GHANA LTD	11,140	1,143	12,283	2.50%
OIL AND MARINE AGENCIES	15,310	4,915	20,225	4.12%
PANALPINA	5	0	5	0.00%
PIL GHANA LTD	37,344	10,200	47,544	9.69%
SAFMARINE	0	9,890	9,890	2.01%
SCANSHIP GHANA LIMITED	8,914	1,809	10,723	2.18%
SDV LIMITED	18,132	50	18,182	3.70%
SEVENLOG LIMITED	4	60	64	0.01%
SHARAF SHIPPING	11	50	61	0.01%
SUPERMARITIME GHANA LIMITED	4,424	1,366	5,790	1.18%
TOTAL LOGISTICS	8	0	8	0.00%
UNITED ARAB SHIPPING AGENCIES GH.	10,550	0	10,550	2.15%
TOTAL	376,165	114,662	490,827	100.00%