

GHANA SHIPPERS' AUTHORITY

GHANA'S MARITIME TRADE REVIEW 2015

1.0 COMPARISON OF CARGO THROUGHPUT 2015 AND 2014

Cargo throughput for the review period Jan -Dec, 2016 increased by 7.97% compared to the same period of 2015 (i.e. Jan -Dec, 2015). Total import and export trade volume for Jan -Dec, 2016 increased by 9.64% compared to Jan -Dec, 2015. Total transit/transshipment trade volume for Jan -Dec, 2016 decreased by 16.86% over Jan -Dec, 2015.

Table 1 SUMMARY COMPARISON OF GHANA'S CARGO THROUGHPUT 2015 AND 2014			
TRADE TYPE	2015 (mt)	2014 (mt)	CHANGE
TOTAL IMPORT & EXPORT	16,052,617	15,184,565	5.72%
TOTAL TRANSIT/TRANSH.	1,083,418	805,354	34.53%
CARGO THROUGHPUT	17,136,035	15,989,919	7.17%

2.0 PORTS SHARE OF CARGO THROUGHPUT FOR 2014

Cargo throughput for the seaports of Ghana (i.e. Tema and Takoradi) for Jan -Dec. 2016 was 18.50 million metric tons (mt). Cargo throughput for the Port of Tema was 13.0 million mt representing 70.3% of the total, whilst the Port of Takoradi recorded 5.5 million mt, representing 29.7% of the total seaborne trade.

Transit/Transshipment imports amounted to 861,299mt, whilst transit/transshipment exports recorded 39,464mt. Table 2 below shows the summary performance for the review period.

Table 2.SUMMARY OF GHANA'S SEABORNE TRADE (in mt)					
2015					
PORT	IMPORT (mt)	TRANSIT/ TRANSHP. IMPORT (mt)	*EXPORT (mt)	TRANSIT/ TRANSHP. EXPORT (mt)	TOTAL (mt)
TEMA	10,281,318	980,665	1,547,349	23,886	12,833,218
TAKORADI	1,401,075	78,867	2,822,875	0	4,302,817
TOTAL	11,682,393	1,059,532	4,370,224	23,886	17,136,035

3.0 COMPARISON OF GHANA'S SEABORNE TRADE for 2015 AND 2014 PER CARGO TYPE

3.1 IMPORT TRADE

Total imports for the review period Jan-Dec. 2016 was 12.05 million mt. This comprised 4.1 million mt of Liner cargo, 1.75 million mt of Break bulk, 2.68 million mt of Dry bulk cargo and 3.5 million mt of Liquid bulk imports.

In Table 3 below, it can be seen that imports for Jan-Dec. 2016 increased by 3.19% over Jan-Dec. 2015. For the trade types, there was a decline in Liner imports by 11.99%. Break bulk imports decreased by 11.76%, Dry bulk imports increased by 5.38% and Liquid bulk imports also increased by 41.36%.

Table 3 COMPARISON OF GHANA'S SEABORNE TRADE PER CARGO TYPE			
TRADE TYPE	2015 (mt)	2014 (mt)	Change
IMPORT:			
Liner	4,660,755	3,966,118	17.51%
Break Bulk	1,987,695	2,014,102	-1.31%
Dry Bulk	2,548,959	2,819,057	-9.58%
Liquid Bulk	2,484,984	2,001,638	24.15%
TOTAL IMPORT	11,682,393	10,800,915	8.16%
EXPORT:			
Liner	1,432,615	1,581,219	-9.40%
Break Bulk	497,035	473,966	4.87%
Dry Bulk	2,423,424	2,291,502	5.76%
Liquid Bulk	17,150	36,963	-53.60%
TOTAL EXPORT	4,370,224	4,383,650	-0.31%
TOTAL IMPORT & EXPORT	16,052,617	15,184,565	5.72%

3.2 EXPORT TRADE

The total export trade volume for Jan-Dec, 2016 was 5.54 million mt. This represents 26.91% increase over Jan-Dec, 2015. This was made up of 1.40 million mt of Liner items, 497,808 mt of Break bulk items, 3.40 million mt of Dry Bulk and 239,881 mt of Liquid Bulk.

4.0 PERFORMANCE IN LADEN CONTAINERS

Table 5 below shows the details of the performance in laden containers for Jan-Dec. 2016. Total Laden Containers for imports and exports for Jan-Dec. 2016 was 575,450 TEUs. This represents an increase of 10.16% compared to Jan-Dec. 2015.

Total import Laden Containers for Jan-Dec. 2016 was 467,882 TEUs; a 13.91% increase compared to Jan-Dec. 2015. Total export Laden Containers for Jan-Dec. 2016 was 107,568 TEUs; representing a decline of 3.65% compared to Jan-Dec. 2015.

Table 5 GHANA'S SEABORNE TRADE IN LADEN CONTAINERS (in TEUs) PER PORT				
TRADE TYPE	PORT	2015 (in TEU)	2014 (in TEU)	CHANGE
IMPORT	TEMA	396,656	364,399	8.85%
	TAKORADI	14,076	11,767	19.62%
	TOTAL IMPORT	410,732	376,166	9.19%
EXPORT	TEMA	86,783	95,113	-8.76%
	TAKORADI	24,855	19,549	27.14%
	TOTAL EXPORT	111,638	114,662	-2.64%
TOTAL	IMPORT/EXPORT	522,370	490,828	6.43%

5.0 DIRECTION OF GHANA'S SEABORNE TRADE

5.1 Import Trade

Table 6 and Figure 1 below show that majority of Ghana's seaborne imports for the period Jan-Dec. 2016 came from the Far East range, representing about 33% of the total import trade. Africa was next with 27% share of Ghana's import trade. Imports from Africa were

3,245,502 mt, an increase of 1,178,470 mt (or 57.01%) over the previous year's figure of 2,067,032 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 an increase of 1,252,345 mt (i.e. 94.02%) over the previous year's figure of 1,331,919 mt.

Table 6.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	125,775	660,052	410,745	197,827	2,198,051	601,837	466,468	4,660,755
BREAK BULK	234,050	66,093	39,893	15,902	1,323,721	44,191	263,846	1,987,696
DRY BULK	0	440,293	1,054,605	302,837	622,274	89,085	39,864	2,548,958
LIQUID BULK	0	989,377	6,312	55,427	29,589	1,331,919	72,359	2,484,983
TOTAL	359,825	2,155,815	1,511,555	571,993	4,173,635	2,067,032	842,537	11,682,392
SHARE	3%	18%	13%	5%	36%	18%	7%	100%

5.2 Export Trade

The 5.55 million mt of seaborne exports for Jan-Dec. 2016 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 3,630,797 mt (i.e. 65.5% of total exports) whilst the North Continent range received a total of 816,723mt (or 14.7% of total exports). Table 7 below gives more details about the direction of Ghana's seaborne export trade for Jan-Dec, 2016.

Table 7. 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	76,812	359,855	195,573	83,410	485,952	100,744	130,269	1,432,615
BREAK BULK	405	20,674	15,366	21,872	373,220	1,687	63,811	497,035
DRY BULK	8,950	275,624	180,061	813	1,387,642	0	570,334	2,423,424
LIQUID BULK	0	1,506	0	9,880	0	5,764	0	17,150
TOTAL	86,167	657,659	391,000	115,975	2,246,814	108,195	764,414	4,370,224
SHARE	2.0%	15.0%	8.9%	2.7%	51.4%	2.5%	17.5%	100.0%

6.0 TRANSIT TRADE AND TRANSSHIPMENT THROUGH THE SEAPORTS OF GHANA

Total Transit/Transshipment trade volume for Jan-Dec. 2016 shows a decrease of 16.86% compared to Jan-Dec. 2015. Total volume of transit/transshipment for Jan-Dec. 2016 was 900,763 metric tons (mt).

Transit/Transshipment Imports for Jan-Dec. 2016 amounted to 861,299 mt, a decrease of 18.71% compared to Jan-Dec. 2015. Transshipment/Transit Exports recorded 39,464 mt in Jan-Dec. 2016, an increase of 65.2% compared to Jan-Dec. 2015. Table 8 below shows the details of the transit/transshipment trade volumes for the review period.

Table 8. SUMMARY COMPARISON OF TRANSIT TRADE AND TRANSSHIPMENT THROUGH THE SEAPORTS OF GHANA 2015 AND 2014			
TRADE TYPE	2015 (mt)	2014 (mt)	CHANGE
TRANSIT/TRANSH. IMPORT	1,059,536	779,855	35.86%
TRANSIT/TRANSH. EXPORT	23,886	25,499	-6.33%
TOTAL	1,083,422	805,354	34.53%

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 738,426 mt in Jan-Dec. 2016. This represents a decline of 23.70% compared to Jan-Dec. 2015. The transit trade comprises imports of 701,999 mt and exports of 36,427 mt for Jan-Dec. 2016.

Major transit trade commodities included Bagged Fertilizer, Processed Foods/ Beverages and Cashew nuts. Details are shown in Table 9.

Table 9. SUMMARY COMPARISON OF TRANSIT TRADE for BURKINA FASO, MALI & NIGER			
2015 AND 2014			
TRADE TYPE	2015 (mt)	2014 (mt)	Change
TRANSIT IMPORT	951,707	569,010	67.26%
TRANSIT EXPORT	16,054	19,316	-16.89%
TOTAL	967,761	588,326	64.49%

8.0 SHIPPING LINE PERFORMANCE IN GHANA'S SEABORNE TRADE

8.1 Shipping Line Performance in the Containerized Trade

Forty (40) Shipping Lines were involved in the containerized cargo trade which amounted to 522,370 TEUs for the review period Jan-Dec. 2015. The highest operators were Maersk Line, with 157,924 TEUs (30.23% of the container trade) and Mediterranean Shipping Company (MSC), with 86,692 TEUs (16.60%).

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 16.1 million mt of Ghana's seaborne cargo (import & export) through the Ports of Tema and Takoradi during Jan-Dec. 2015.

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 522,357 TEUs for the review period Jan-Dec. 2015. The highest performing agencies were Maersk Ghana Ltd, with 158,098 TEUs (30.27% of the containerized trade) and MSC, with 86,692 TEUs (16.60% of the containerized trade).

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

Seventy three (73) Shipping Agents handled over 16.1 million mt of seaborne trade (import & export) through the Ports of Tema and Takoradi during the period Jan-Dec. 2015.

PERFORMANCE OF SHIPPING LINES PER LADEN CONTAINERS (in TEUs)				
TOTAL (TEMA & TAKORADI)				
JAN- DEC. 2015				
SHIPPING LINE	IMPORT	EXPORT	TOTAL	% of TOTAL
ADVANCED MARITIME	2	37	39	0.01%
AFRICA EXPRESS LINE	1,445	277	1,722	0.33%
ARKAS LINE	9,332	2,640	11,972	2.29%
AFRITRAMP	1	1	2	0.00%
BOCS	7	0	7	0.00%
BOLLORE AFRICA LTD	703	1,209	1,912	0.37%
BBC CHARTERING	4	0	4	0.00%
CARIN	32	0	32	0.01%
CHINA OCEAN SHIPPING	9,472	4,007	13,479	2.58%
CHINA SHIPPING	8,527	737	9,264	1.77%
CMA CGM	7,562	4,967	12,529	2.40%
DELMAS	1,271	3,362	4,633	0.89%
DANGOTE	262	0	262	0.05%
EAGLE WEST AFRICA SERV.	3,743	1,043	4,786	0.92%
EVERGREEN SHIPPING	16,247	2,373	18,620	3.56%
GOLD STAR LINE	15,612	10,704	26,316	5.04%
GRIMALDI LINES	15,219	3,247	18,466	3.54%
HANJIN SHIPPING	9,494	2,426	11,920	2.28%
HAPAG-LLOYD	17,776	7,494	25,270	4.84%
HB SHIPPING	6	4	10	0.00%
HC TRADING	788	808	1,596	0.31%
HOEGH AUTOLINERS	10	4	14	0.00%
I.M.T	66	4	70	0.01%
MAERSK LINE	136,391	21,533	157,924	30.23%
MEDITERRANEAN SHIPP. CO	65,067	21,625	86,692	16.60%
MESSINA LINES	2,583	698	3,281	0.63%
MITSUI O.S.K. LINES	37,707	4,869	42,576	8.15%
NECOTRANS	2	0	2	0.00%
NYK	4,661	1,331	5,992	1.15%
OTHER	107	6	113	0.02%
PACIFIC GLORY	4	0	4	0.00%
PACIFIC INTL. LINE	31,451	6,064	37,515	7.18%
SAFMARINE	0	5,326	5,326	1.02%
SEVENLOG LTD	9	0	9	0.00%
THE COCA COLA BOTTLING CO. GH	14	0	14	0.00%
THORCO	0	18	18	0.00%
UNITED ARAB SHIPP. CO	10,910	1,719	12,629	2.42%

UNIVERSAL AFRICA LINE	69	16	85	0.02%
VITOL S.A.	21	0	21	0.00%
ZIM LINE	4,155	3,089	7,244	1.39%
TOTAL	410,732	111,638	522,370	100.00%

PERFORMANCE OF SHIPPING AGENTS PER LADEN CONTAINERS (in TEUs)				
TOTAL (TEMA & TAKORADI)				
JAN – DEC (F1) 2015				
SHIPPING AGENT	IMPORT	EXPORT	TOTAL	% SHARE
ADVANCE MARITIME	2	37	39	0.01%
AFRICAN INDEPENDENT FEEDER GH. LTD	14	0	14	0.00%
ANTRAK GHANA LTD	8,200	2,920	11,120	2.13%
BEACON SHIPPING GHANA	9,494	0	9,494	1.82%
BLUE FUNNEL GHANA	9,332	0	9,332	1.79%
BOLLORE AFRICA LOGISTICS	0	2,373	2,373	0.45%
DELMAS SHIPPING GH. CMA CGM	8,833	8,329	17,162	3.29%
DW CABLE NET SHIPPING GH LTD	6	0	6	0.00%
GETMA GHANA LTD	2	18	20	0.00%
GMT SHIPPING LTD	128	0	128	0.02%
GRIMALDI GHANA LTD	15,152	3,174	18,326	3.51%
HELPMARINE	32	0	32	0.01%
HULL BLYTH GHANA	794	7,547	8,341	1.60%
INCHCAPE SHIPPING SERVICES	22	0	22	0.00%
INTERMODAL SHIPPING AGENCY GH	19,721	13,793	33,514	6.42%
MAC LOGISTICS	27	0	27	0.01%
MACRO LOGISTICS	25	0	25	0.00%
MAERSK GHANA LTD	136,391	21,707	158,098	30.27%
MARITIME	4	0	4	0.00%
MOL GHANA LTD	37,707	4,869	42,576	8.15%
MSCA GHANA	65,067	21,625	86,692	16.60%
NAVITRANS GHANA LTD	8,522	737	9,259	1.77%
OIL AND MARINE AGENCIES	17,780	7,494	25,274	4.84%
PIL GHANA LTD	31,451	6,087	37,538	7.19%
SAFMARINE	0	5,152	5,152	0.99%
SCANSHIP GHANA LIMITED	9,247	4,448	13,695	2.62%
SDV	16,247	0	16,247	3.11%
SEVENLOG LIMITED	9	0	9	0.00%
SIFAX AGENCIES	84	0	84	0.02%
SUPERMARITIME GHANA LIMITED	5,520	1,324	6,844	1.31%
UNITED ARAB SHIPPING AGENCIES GH.	10,910	0	10,910	2.09%
TOTAL	410,723	111,634	522,357	100.00%