

Second study identifies routing options and ample terminal capacity to gear-up short-sea container services, post-Brexit, to alleviate congestion through Dover

London, UK, 3 April 2019 – Alternative capacity could be provided by short-sea container services between the UK and EU to alleviate possible congestion at the Port of Dover post-Brexit, according to a study by global shipping consultancy Drewry. These latest findings follow an earlier Brexit briefing and resilience study by Drewry which concluded that the Port of Dover had the capacity to cope with moderate Brexit disruption.

An earlier study, validated by the Port of Dover, concluded that of the 2.5 million trailers going via Dover, around 20% (i.e. 500k trailers) could possibly shift to another mode of transport. Using this ‘alternative mode’ assumption, Drewry sought to understand the current container services available at UK Ports, their connectivity with EU Ports and to examine what container shipping lines could do to accommodate additional volumes by understanding current service capacity levels and how easily additional capacity, if required, might be deployed.

“In this second phase of our short-sea analysis we have turned our attention to alternative capacity and congestion mitigation,” said Tim Power, head of Drewry Maritime Advisors. “We understood from the findings of our initial assessment that a proportion of trailer-based freight transiting Dover could be suitable for transportation and re-routing by container. We wanted to see whether and how this could be handled”.

“In assessing the practical viability of that alternative it became clear that container shipping line services not only have the capacity, options and flexibility to handle additional container volumes in the event of disruption to cross-Channel freight services but crucially, container terminals in the UK have the capacity to meet the additional throughput demands,” said Power.

A number of conclusions were highlighted by the study:

- Volumes that could be re-routed from Dover: Of the cargo in the 2.5 million trailers handled by Dover today, 20% could move to another mode of transport. This translates to around 250,000 units a year (in each direction), equivalent to around 10,000 TEU per week in each direction;
- Alternative routes and modes: There are four ways that container shipping lines could cater for this demand: making use of spare capacity on existing services; increasing frequency on existing services; increasing vessel sizes on existing services; launching new services. The extra demand would not require a significant expansion in capacity;



- Spare capacity at UK container terminals: Combined, 11 container ports in the UK have 5.9m TEU p.a. of spare capacity, most of which in southeast England close to Dover but also in northern England markets This is sufficient to handle this additional volume and provides wide geographical coverage;
- Vessel availability: There are sufficient container vessels in the market today – feeder size vessels represent over half of the total fleet - and there is a very liquid charter market;
- Container box availability: North Europe, in general, imports more full containers than it exports. Surplus containers on the Continent could be used for exports to the UK. After unpacking, these containers could be moved to demand locations in Asia on deep-sea services.

A copy of these latest study findings is available to download from the Drewry website at www.drewry.co.uk/white-papers

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Notes: Among the political arguments about Brexit and its consequences, there has been a surprising lack of objective and quantitative analysis of the implications for the future of the vital short sea trade between the UK and the EU, particularly for the key port of Dover, and how traffic might be routed in future if Dover faced capacity constraints.

Drewry has sought to fill this information gap by carrying out a series of assessments including port capacity analysis to determine to what degree and under what circumstances bottlenecks might occur. In this latest study attention has been given to the trailer freight currently transiting Dover in RoRo vessels that might be re-routed via container services and how easily that might be geared-up to alleviate possible congestion on this most popular short-sea route.

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