



Dynamar's Ports & Terminals

Europe & Africa 2023

Dynamar

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Europe & Africa

2023

July 2023



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INTRODUCTION

Ports are an indispensable link in the container supply chain providing the interface between the land and maritime aspects of multimodal operations. As such, their good performance is critical.

The year 2022 has shown clearly what happens when ports do not work optimally, for whatever reasons, and not always of their own making. The resultant persistent congestion caused severe logistical challenges and, in the worst cases, ripples along the entire supply chain perhaps even leading to empty shelves. Therefore, ports and terminals are continuously developing by building new quays, expanding their physical footprint, installing new cranes, upgrading software and optimising processes.

In its simplest form, a port might only comprise a small quay line just long enough to berth a single vessel, and nothing else. Bigger ports offer more berths, their own handling equipment and often more than one terminal, in many cases under control of different operators. Where for the smallest ports further connections are limited to the use of trucks, the biggest outlets tie seagoing mainline ships to feeders, inland barges, trains and trucks.

There is a distinction between gateway ports, serving their hinterlands only, and hubs, where containers are transhipped from one vessel to another without the container actually passing the port's landside "gates". Whilst a small number of ports rely almost fully upon transshipment and many ports provide gateway connections only, a fair number operate in both capacities.

As a container shipping specialist, Dynamar follows the developments in the sector on a day-to-day basis, collecting large amounts of data on companies, services, trades, fleets, ports and terminals. The results, and our subsequent analyses and conclusions, are published through our product portfolio of business information reports, newsletters, publications and consultancy projects.

For the first time, Dynamar has brought its ports and terminal databases together to launch a new series of publications, "*Dynamar's Ports & Terminals*". These will provide reference material on all relevant terminals involved in the handling of containers. In front of you is the first part: *Europe & Africa*. With detailed information on existing terminals and new infrastructure under development, it covers close to 400 pages. Clearly a voluminous body of work, not only is its page count is big, but also its key figures for the Europe and Africa regions:

- 304 ports in 82 countries (20 in North Europe, 21 in North Mediterranean and 41 in Africa)
- 459 existing terminals (201 in North Europe, 120 in North Mediterranean and 138 in Africa),
- 18 existing terminals undergoing expansion and 13 that have such under consideration
- 26 new terminals being developed with 25 new ones under consideration
- The existing terminals operate a combined 1,300 berths with an aggregated quay line of 232,000 metres, equipped with 1,500+ Ship-to-Shore gantry cranes and 600+ Mobile Harbour cranes

In the publication, for each of the 82 ports, where data is available, you will find the following items:

- Port location map
- Port throughput figures
- Responsible port authority
- Information Boxes for each terminal in port handling containers

Further detail is contained within the Terminal Information Box, which itself consists of two parts:

- Terminal Overview:
 - Terminal operating company and shareholders
 - Geographical location, right down to where it is within the port
 - Hyperlink directly to the terminal's website

- Terminal Characteristics:
 - Design annual handling capacity in TEU
 - Terminal/yard area in ha
 - Quay line in metres
 - Depth/draught alongside the quay in metres
 - Equipment, by type and number, installed or planned

The port profiles are preceded by a chapter explaining how the profiles and Terminal Information Boxes should be read and how the information should be interpreted.

Alkmaar/the Netherlands
July 2023
Frans Waals, Senior Shipping Consultant

EXPLANATION TO THE PROFILES

Structure of the publication

The following chapters provide details per country on ports and terminals that handle containers. This publication is organised in such a way that it can be read from front to back, but can also serve as a reference to looking up specific information.

In the first instance the publication is split by coastal area. From north to south, these are:

- Scandinavia & Baltic
- North West Continent & Atlantic
- North Mediterranean & Black Sea
- North Africa & Levant
- West Africa
- Southern Africa & Indian Ocean Islands
- East Africa

Each coastal area is then detailed by country, these being ordered geographically. As some countries have coastlines in more than one coastal area, such as Spain, with an Atlantic coast, a Mediterranean coast and the Canary Islands located along the coast of West Africa. Each country profile consists, providing information is available, of the following parts:

- Port location map
- Throughput totals by port
- Terminal profiles per port

Throughput totals by port

Most countries, ports or terminals, though unfortunately not all, publish their container throughput figures in TEU (Twenty-Foot Equivalent Unit). Some are very consistent and release them according to a fixed schedule and/or with a high level of detail. Others disclose them only on an ad-hoc basis and sometimes years afterward, or not at all. Sometimes they are published at a higher aggregate level, such as a country total or totals per region, whilst other sources report them in tons rather than in TEU.

Throughput	2022	2021	2020	2019	2018	2017	2016	2015	2014	2013
TEU	TEU	TEU	TEU	TEU	TEU	TEU	TEU	TEU	TEU	TEU
Amsterdam	87,100	86,100	49,400	50,700	52,000	56,200	51,500	51,600	52,100	65,100
Flushing	120,500	131,100	178,100	164,400	68,000	32,000	26,900	16,800	12,500	9,300
Moerdijk	258,400	253,100	172,400	162,100	165,000	169,000	148,500	97,100	86,900	55,500
Rotterdam	14,455,000	15,300,000	14,349,400	14,810,800	14,512,700	13,734,300	12,385,200	12,234,500	12,298,000	11,621,200
Other	8,300	11,400	7,900	10,100	4,600	1,000	100	600	7,100	900
Total	14,921,000	15,770,400	14,749,300	15,188,000	14,797,700	13,991,500	12,612,000	12,400,000	12,449,500	11,751,100

Typically, throughput comprises those boxes (measured in TEU) that are *lifted* onto or from a *seagoing* vessel (so not rolled). They include both *full and empty* boxes and containers *transhipped* from one vessel onto the other, but exclude restows (containers that are lifted from a ship to allow access to other containers on board and then put back). Even though this sounds like a logical definition, unfortunately it is not. Whilst the majority of ports publish “clean” figures, others include in their calculations containers that were rolled rather than lifted or that were transported by inland barge and to or from destinations along canals or rivers.

Throughput figures in this publication were collected from various sources, such as statistics offices, port authorities, port organisations, terminals, press reports, etc. Interestingly, different sources can arrive at

different values for the same port in the same year. Some can be explained by differences in the source material, such as taking data from the terminals directly or from the bills of lading, and although these should typically be the same, they are not always. Another example is when statistics are based on (incomplete) trade data or where the initial data published were provisional, but never updated. And sometimes data are just estimates. For this publication as many statistics as possible have been brought together and where possible their validity has been checked and the most accurate data selected.

For the above reasons, not all statistical sets are (yet) complete. The throughput tables in the next sections list, where available, TEU volumes for the ports specified in the country profiles over the period 2013-2022, but excludes minor ports without relevant container infrastructure that were not further specified. When reading the data, it should be taken into account that when a cell contains a hyphen (“-”), this means there is no data available, whilst a zero (“0”) means that there is no relevant throughput. Ports not further specified are aggregated under the term “other”. Country totals are aggregated at the bottom of the table, but only when data for all ports, including those classified as “other”, are available.

Port location maps

Country maps show the geographical locations of a country’s relevant container ports and in some cases ports that are still under construction or just under consideration. Ports without substantial container activities are not included in the maps.



Terminal profiles per port

Each port profile consists of some basic details, these being the name of the port, its port authority and an interactive hyperlink to its website. On top of that, there is an Information Box for each relevant terminal or new terminal project within the boundaries of the port. Port authorities can be either public companies or privately owned.

Alesund

Authority: : Alesundregionens Havnevesen
 Website : <https://alesund.havn.no/>

Many terminals handle at least few containers, but that does not necessarily qualify them as a container terminal. This publication includes facilities that handle containers on a regular basis, usually from liner

vessels, but excludes those that handle only small volumes on an ad-hoc basis and that are usually carried by breakbulk vessels or similar. Each Information Box provides the following information, with an example also given below.

- Status
- Terminal name
- Terminal type
- Photograph
- Terminal overview
- Technical characteristics

Container Terminal Burchardkai

Overview

Operator	HHLA (100%)
Port	Hamburg
Location	53.5340N, 9.9193E
Website	https://hlla.de/
Remarks	Waltershof



Characteristics

Design Capacity [TEU]	5,600,000
Area (ha)	140
Quay (m)	2,850 (10 berths)
Draught (m)	16.5
Quay cranes, #	StS Gantry, 29 unit(s)
Max Outreach (Boxes)	26 (incl 6x24, 5x26)
Yard cranes, #	RMG/ARMG, -/15 unit(s)
Reefer plugs (#)	1,680



Status

Besides facilities currently in operation, this publication also lists new terminal projects that could eventually, but not necessarily will, come into existence. The Information Boxes for those facilities are displayed in greyscale with red letters. There are three different statuses applied to each terminal covered in this publication:

- **Operational:** Any terminal that is currently in operation and handles containers on a regular basis (blue box)
- **New development:** Any new terminal project that is currently being built or is in an advanced state of planning and likely to materialise (grey box)
- **Future development:** Terminal projects that have been proposed and may ultimately come into existence, but many progress has been very slow it not absent (grey box)

Boluda Maritime Terminals Santander New Terminal

Overview

Operator	Boluda Maritime Terminals Santander - Boluda Maritime Terminals
Port	Santander
Location	43.4460N, 3.8199W
Website	https://www.boluda.com.es/en/maritime-terminals/santander-en/
Remarks	Espigón Norte de Raos



Characteristics

Design Capacity [TEU]	112,000
Area (ha)	6.7
Quay (m)	472
Draught (m)	13
Quay cranes, #	StS Gantry, 2 unit(s)
Yard cranes	-
Reefer plugs (#)	144

Terminal name

On top of each of the Information Boxes the name of the terminal is mentioned. Most terminals have an official name, but can also be referred to by different names, such as that of the terminal operating company, the quay or port area, or sometimes a previous name that has been discontinued but is still generally used. Sometimes simple references like “berth X” or “container berth” are also used.

Terminal type

Depending on what ships it serves and which cargoes it handles this publication distinguishes three different terminal types. The type of facility is indicated with a pictogram in the top right corner of the Information Box, as specified below.



Dedicated container terminal, usually equipped with Ship-to-Shore gantry cranes or Mobile Harbour Cranes and specialised yard equipment. It may handle breakbulk or other cargo types on an occasional basis, usually from specialised containerships



Multipurpose terminal, handling both containers and breakbulk and usually provided with more basic infrastructure and superstructure. Sometimes it also handles dry bulk or other cargo types



Multipurpose Ro/Ro terminal, besides containers and breakbulk also handling cars or other rolling stock, and may be equipped with ramps or have specialised storage areas for rolling stock

The publication takes into account those terminals that handle on a regular basis the following ship types:

- *Containership*, being cellular or just box shaped
- *Multipurpose ship*, which combine the regular transport of containers with breakbulk
- *Container Ro/Ro ship*, which combine containers on deck or occasionally in separate holds with space dedicated to rolling cargo
- *Conventional reefer ship*, with on-deck container space

Containership



Multipurpose ship



Container Ro/Ro ship



Conventional reefer ship



Photograph

Each Information Box comprises a photograph of the terminal usually taken from the Internet with a aim to provide a good impression of the facility. For some terminal it is easy to obtain high-quality images, but in other cases, unfortunately, the choice of photographs is very limited and/or of low resolution.

Overview

The overview section of the Information Box, provides the following details:

- Operator - Shareholders
- Port
- Location
- Website
- Remarks

Operator - Shareholders

Port infrastructure can be operated directly by the port authority, a corporatized unit of the port authority, one or more private operators or a combination of the above. The simplest case is when both the infrastructure (the quay) and superstructure (the cranes and other equipment) are under control of the same party, be it public or private. However, port infrastructure can have a different owner than the superstructure, whilst a concession holder (stevedore) can be responsible for the operations, but not be the owner of any of these. Also, the same quay line or even the same superstructure can be shared between different stevedoring companies

Most terminals are run by a single operating company, albeit often with multiple shareholders often involving one or more of the global stevedores. Some examples of operator's description in the Information Boxes are:

Port of Oulu Ltd.

The terminal is operated by (a corporatised) division of the port authority of Oulu

Eurogate

The terminal is operated by global Stevedore Eurogate (no specific terminal operating company is specified)

Euroports Rauma Oy - Euroports

The operating entity of the terminal is Euroports Rauma Oy, which is a full subsidiary of Euroports

EUROGATE Container Terminal Wilhelmshaven GmbH & Co. KG - Eurogate (70%) / Hapag-Lloyd (30%)

The terminal has EUROGATE Container Terminal Wilhelmshaven as its operator, which is a joint venture between stevedoring company Eurogate and carrier Hapag Lloyd, with a 70%-30% shareholding

Rotterdam World Gateway B.V. - DPW (30%) / Terminal Link (CMA CGM (51%) / China Merchants (49%), 30%) / MOL (20%) / HMM (20%)

The terminal is operated by Rotterdam World Gateway, which has as its shareholders DP World (DPW, 30%), Terminal Link (30%), MOL (20%) and HMM (20%). In turn, Terminal Link is a 51-49 joint venture between CMA CGM and China Merchants

Shared between Seafront Port Services AS and Greenport Services AS

The same quay is used by more than one operator, Seafront Port Services and Greenport Services, each using their own equipment or sharing the equipment that was installed by the owner/port authority

The terminal business is dominated by a limited number of global stevedores, besides many smaller ones. These are either independent stevedoring companies, such as PSA (Port of Singapore Authority) or part of a container carrier, such as APM Terminals. Some of the carriers are actually the owner or part owner of more than one stevedoring chain, such as MSC, which is the full owner of Africa Global Logistics and of Marininvest and the controlling shareholder of Terminal Investment Limited. For practical purposes, some of the names used in the Information Boxes have been abbreviated as per below.

<i>Stevedore</i>	<i>Stevedoring companies and abbreviations</i>
MSC	TIL - Terminal Investment Limited AGL - Africa Global Logistics Marinvest
Maersk	APMT - APM Terminals
CMA CGM	CMA Terminals Terminal Link (51%)
Cosco Shipping Holding	CoscoSP - Cosco Shipping Ports
China Merchants Ports	China Merchants Terminal Link (49%)
DP World	DPW
Hutchison Ports	Hutchison
International Container Services Inc	ICTSI
Port of Singapore Authority	PSA
Yilport	Yilport

Location

Coordinates refer to the location of the terminal. The numerical value can be used to find the location using any of the mapping programmes or the user can click on the interactive link in the document, which will automatically open the location in Google Maps.

Website

Often, the terminal operator has its own website or has its own section within a port authority or a global stevedore's overall website. In other cases, the terminal information is part of the greater company's website. The internet address can be copied into a browser, or it clicked so that it opens automatically in a browser.

Remarks

The remarks field is used for extra information on a terminal not specified in any of the other fields, such as the port area in which it is located, berth numbers, development phase or status (e.g. "being upgraded").

Characteristics

The characteristics section provides the technical details of the terminal. It comprises the following aspects:

- Design capacity
- Terminal or yard area
- Quay length
- Depth or draught
- Quay cranes
- Outreach
- Reefer plugs

Design capacity

Design capacity is the theoretical number of containers a terminal can handle per year. When throughput approaches design capacity, usually the terminal becomes inefficient and congested, so in practice the real capacity is usually somewhere around 80% of the design capacity. In some cases, the terminal turns out to be more efficient than its design suggests and then it handles more than what it was designed for. Design capacity is measured in TEU. Numbers between square brackets "[]" are future value(s) for design capacity. To achieve those, the facility usually needs some investment.

Area

Area refers to the footprint of the terminal. It can refer to the total area of the terminal, including all its buildings or facilities, but also the container yard only. It is measured in hectares (ha), with one hectare being equal to 10,000 sqm. Values between brackets are future values.

Quay length

Quay length refers to the length of the quay line used for handling seagoing containerships. In dedicated container terminals this usually refers to the part of the quay that is used for box handling, but excludes Lay-by berths or berths only used for inland barges. Values between brackets are future values.

Sometimes, between round brackets, a number of berths is also mentioned. Usually, this is a theoretical number of berths as often there is no strict division between them. In cases where berths are not connected or there is a physical barrier, it represents the actual number of ships that can call there simultaneously.

Depth or draught

Depth refers to the actual distance between the water surface and the bottom of the port at low tide. To moor there, ships need a clearance between their keel and the bottom, which varies somewhere between 0.5 and 1.0 metres. The maximum submersion of the ship, accounting for the clearance, is called maximum draught. When the maximum draught (or draft) allowed by the quay is exceeded by the maximum draught of the ship mooring there, the vessel cannot berth fully laden.

Both depth and draught are measured in metres. The values can vary per berth in the same terminal or even be different for different parts of the same berth. Generally, the value provided in the Information Box gives a spread between the berth with the lowest and the berth allowing the highest maximum draught. Values between brackets are future values. When a berth is capable of receiving a vessel with a specific draught, this does not necessarily mean that the access channel allows the same maximum draught.

Type and number of quay cranes

The quay cranes field specifies the type(s) and number (#) of cranes installed on the terminal. Terminals handling containers are usually equipped with Ship-to-Shore gantry cranes (StS gantry), Mobile Harbour Cranes (MHC) or other cranes types (QC), such as portal cranes, although some facilities require the vessels visiting to be geared. QC is also used if the actual crane type is unknown. Crane types written in brackets have not yet been installed, but are on order or planned.

Ship-to-Shore gantry crane



Mobile Harbour Crane



Portal crane



Outreach

Outreach refers to the distance the crane's spreader can reach over the ship. It can be specified in metres, when it refers to the distance between the crane base and its maximum outreach, a measure that also includes part of the quay and the fenders. This publication, however, prefers to measure outreach as the number of containers across the width of the vessel that a crane can extend. As the distance between the crane and the fenders can vary per terminal, there is no one-on-one translation from metres to boxes, so that in some instances the outreach in boxes has been estimated. The value presented refers to the crane in the terminal with the furthest outreach. Where data is available, the number of cranes per outreach segment is specified between round brackets.

Yard cranes

Equipment is used to bring containers to and from the yard or move them inside the yard. This field provides the type and number of main equipment types, Rubber-Tyred Gantry (RTG), moving on tyres, or Rail-Mounted Gantry (RMG), moving on rails, or their automated variants, ASC, ARTG or ARMG. If none of those are available, it specifies whether the terminal is equipped with straddle carriers or reach stackers. Again, values between square brackets are future values.

Reefer plugs

Reefer plugs or reefer connections are a sort of socket to which to a refrigerated container can be connected for electricity. Their number is a representative of how much reefer cargo a container terminal can store.

Expansion characteristic

Terminals are constantly undergoing changes and add new infrastructure. When this involves an expansion of the quay line, it is considered an expansion project and it is, under a separate heading, included in the Information Box. Two type of expansions are distinguished:

- *Planned Expansion*: Any expansion project that is currently ongoing or in an advanced state of planning and likely to materialise
- *Future expansion*: Any expansion project that is under consideration for the long-term future and/or for which land may have been reserved

The details of planned expansions are usually quite accurate, as is the time line along which they will take place. Details of future expansions are quite vague and may change over time. Also, they usually have no (reliable) time line planning attached.

Data issues

The data used in this publication is derived from thousands of sources, with different grades of quality and some more recent than others. This includes information published by port authorities, terminal operators, handbooks, databases, press reports, etc. etc. It also includes visual information, such as photographs and satellite maps. All sources have been thoroughly checked. Notwithstanding this, sometimes information turns out not to be fully accurate or up to date. As an example, maximum draught changes regularly because of dredging or silting and draught along the quay is not necessary equal to the maximum draught along the access channel. **Therefore, Dynamar does not take any responsibility for the data in this report and if your critical processes depend upon the accuracy of specific data, Dynamar advises you strongly to contact the relevant authorities.**

Rubber-Tyred Gantry Crane (RTG)



Rail-Mounted Gantry Crane (RMG)



Southport, Old Terminal

Overview

Operator	Sea Ports Corporation of Sudan
Port	Port Sudan
Location	19.6061N, 37.2248E
Website	https://sudanports.gov.sd
Remarks	South Quay, B17, B18, B18 Ext



Characteristics

Design Capacity (TEU)	400,000
Area (ha)	-
Quay (m)	420 (2 berths)
Draught (m)	12.6
Quay cranes, #	StS Gantry, 4 unit(s)
Yard cranes, #	RTG, 15 unit(s)
Reefer plugs (#)	-



A

Aalborg	71
Aarhus	71
Abidjan	301
Abu Qir	251
Ahus	37
Akureyri	151
Alesund	25
Alexandria	251
Algeciras	159
Algiers	268
Aliaga	228
Alicante	160
Almeria	161
Ambarli	229
Amsterdam	86
Anaklia	224
Ancona	173
Annaba	269
Antalya	231
Antwerp	98
Arrecife	281
Ashdod	247
Augusta	173
Azov	221

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Badagry	311
Bagamoyo	361
Bakassi Peninsula	311
Bandirma	231
Banjul	294
Bar	201
Barcelona	161
Bari	174
Bata	319
Batumi	224
Beira	342
Beirut	244
Bejaia	269
Belfast	133
Berbera	370
Bergen	26
Bhengazi	258
Bilbao	115
Bissau	295

Bizerte	264
Boma	326
Bordeaux	107
Bosaso	369
Bremen	77
Bremerhaven	77
Brest	107
Brevik	27
Bristol	133
Burgas	212

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Cabinda	329
Cadiz	115
Cagliari	175
Canical	128
Cape Town	337
Cartagena	163
Casablanca	274
Castellon	164
Catania	175
Chercell	270
Chornomorsk	218
Civitavecchia	176
Conakry	297
Constanta	215
Copenhagen	72
Cork	146
Cotonou	308
Cuxhaven	79

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Dakar	292
Damietta	254
Dar es Salaam	361
Djen-Djen	270
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Douala	317
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Dublin	146
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Felixstowe	135
Ferrol	116
Figueira da Foz	122
Floro	28
Flushing	87
Frederica	73
Frederikstad	29
Freetown	298

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Gdansk	67
Gdynia	67
Gemlik	232
Genoa	176
Ghazaouet	271
Ghent	104
Gijon	116
Gioia Tauro	179
Giurgiulesti	216
Gothenburg	37
Grangemouth	136
Greenock	136
Grundartangi	152
Gävle	38

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Haifa	248
Halmstad	38
Hamburg	79
Haugesund	29
Haydarpara	233
Helsingborg	39
Helsinki	47
Heraklion	205
Horta	130
Huelva	117
Hull	137
Husavik	152

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Ibom	312
Immingham	138

Isafjordur	153	Maputo	342	Piteá	41
Iskenderun	233	Marin	118	Ploce	198
Izmir	234	Marina di Carrara	183	Pointe Noire	325
Izmit	235	Marsaxlokk	193	Ponta Delgada	130
K		Marseilles	170	Port Elizabeth	340
Kaliningrad	54	Massawa	373	Port Gentil	323
Kalundborg	74	Matadi	327	Port Louis	356
Kemi	48	Mersin	237	Port Reunion	354
Khoms	259	Misurata	259	Port Said	255
Kiel	83	Mo I Rana	32	Port Sudan	374
Kismayo	367	Moerdijk	88	Port Victoria	358
Klaipeda	65	Mogadishu	368	Porto Grande	287
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