2023년 4분기

세계 컨테이너 항만 서비스 지표

PORT SERVICE INDICATORS

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주소 49111 부산광역시 영도구 해양로 301번길 26(동삼동 한국해양수산개발원) | **TEL.** 051-797-4800 | **FAX.** 051-797-4810



선석 생산성 04
순선석 생산성 10
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항만 서비스 지표는 전 세계 컨테이너 항만의 경쟁력을 비교할 수 있는 대표 지표를 분석하여
연간 5회(분기별 4회, 연간 1회) 이메일로 배포하고 있으며
한국해양수산개발원 홈페이지(www.kmi.re.kr)에서도 확인하실 수 있습니다.
이메일 수신을 원하시는 분은 전화(051-797-4657) 또는 이메일(pdac@kmi.re.kr)로 연락주시기 바랍니다.

KMI 한국해양수산개발원
KOREA MARITIME INSTITUTE

서비스 지표 정의

선석 생산성
(Berth Productivity)
선석 접안 시간 당 컨테이너 양적하 횟수를 나타낸 지표로 지표가 높을수록 컨테이너 화물을 빠르게 처리하는 것을 의미함 (총 양적하 횟수 / 선석 접안 시간)

순선석 생산성
(Net Berth Productivity)
접안된 선박의 하역작업 개시 시간부터 작업종료까지의 크레인 총 작업시간당 컨테이너 양적하 횟수를 나타낸 지표 (총 양적하 횟수/크레인 총 작업시간)

평균 하역량
(Average Container Throughput)
컨테이너선 1척 당 평균 컨테이너 하역 물량을 나타냄 (TEU)

평균 선형
(Average Vessel Size)
항만을 입출항하는 컨테이너선의 평균 크기를 나타냄 (TEU)

평균 대기시간
(Average Waiting Time)
항만에 접안한 컨테이너선이 정박지에서 대기한 평균 시간을 의미함 (시간)

항만 연결성 지수
(Port Liner Shipping Connectivity Index)
UNCTAD는 전 세계 900개 이상의 컨테이너 항만에 대해 총 6가지 기준을 바탕으로 연결성 지수를 발표하며 지수가 높을수록 거점 항만으로서의 강점이 있다는 의미임

서비스 지표 산정방법

IHS Markit 원자료에서 아래의 조건을 만족하는 선박을 대상으로 선석생산성, 순선석 생산성, 평균 하역량, 평균선형을 산정함

1) 컨테이너선 선형이 최소 150TEU 이상인 선박
2) 컨테이너 작업물량이 300TEU 이상인 선박
3) 선석 접안시간 최소 1시간 이상인 선박
4) 위의 3가지 조건을 동시에 충족하면서 연간 52회 (1년=52주, 주 1항차) 샘플이 있는 항만을 대상으로 함

선박의 실시간 좌표 및 속도가 기록된 AIS(Auto Identification System) 데이터를 활용하여 아래의 방법에 따라 대기시간을 산정함

1) 5노트 이하의 컨테이너선 기록을 이용하여 산정
2) 컨테이너부두에 실제로 정박한 선박의 정박지 대기시간만을 산정
3) 부두 및 정박지의 시설 위치는 AIS 데이터와 함께 World Port Index, IHS Markit Ports & Terminals Guide, Google Earth 등을 종합적으로 활용하여 파악

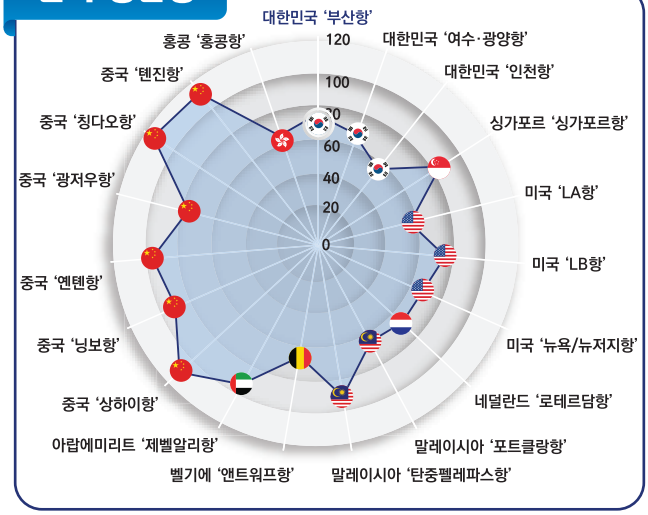
항만연결성 지수는 UNCTAD에서 항만의 주당 선박 입항 횟수, 연간 항만 수용능력, 정기선 운송 서비스 수, 정기선 서비스 제공 선사 수, 최대 수용 가능한 선박 선형, 직기항 서비스로 연결된 항만의 수 등 6가지 기준을 고려하여 2006년 홍콩항 연결성 지수(100)를 기준으로 산정함

주요 항만 결과 요약

(전체 선형 기준)

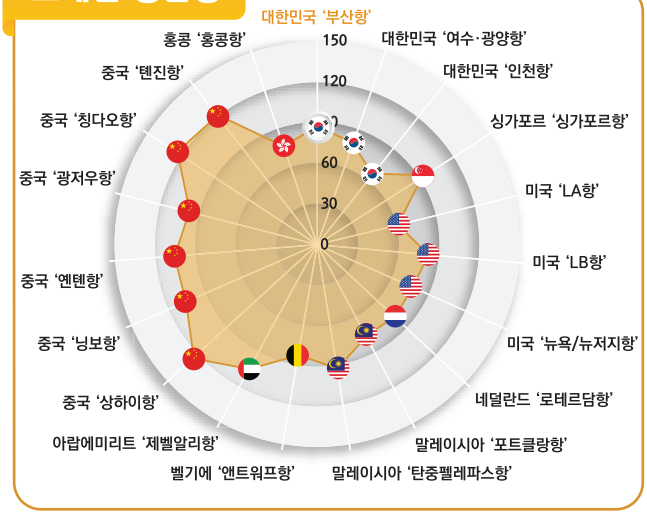
선석 생산성

(회/시간)



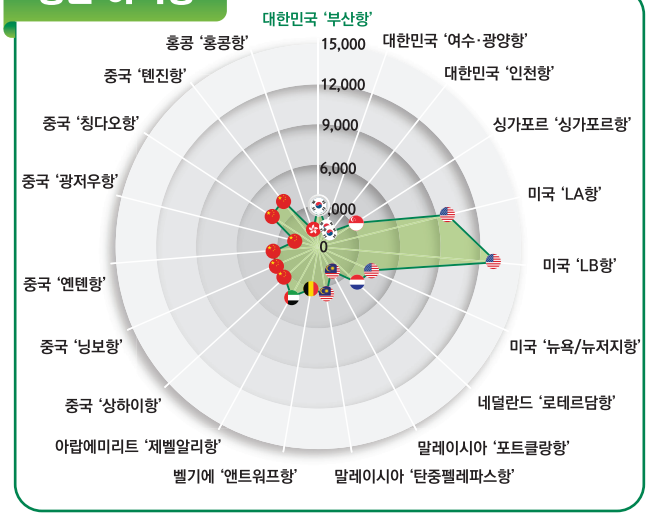
크레인 생산성

(회/시간)



평균 하역량

(TEU)



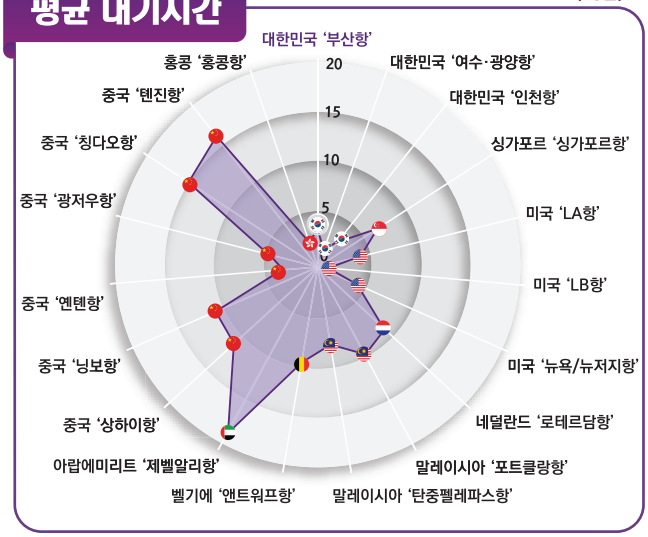
평균 선형

(TEU)

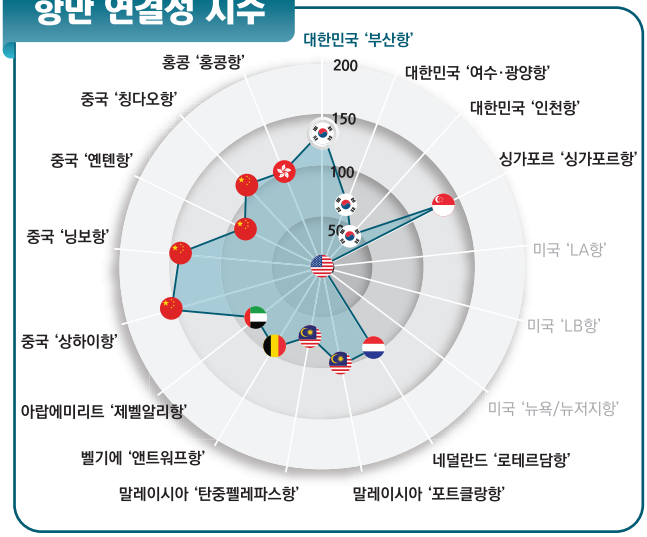


평균 대기시간

(시간)



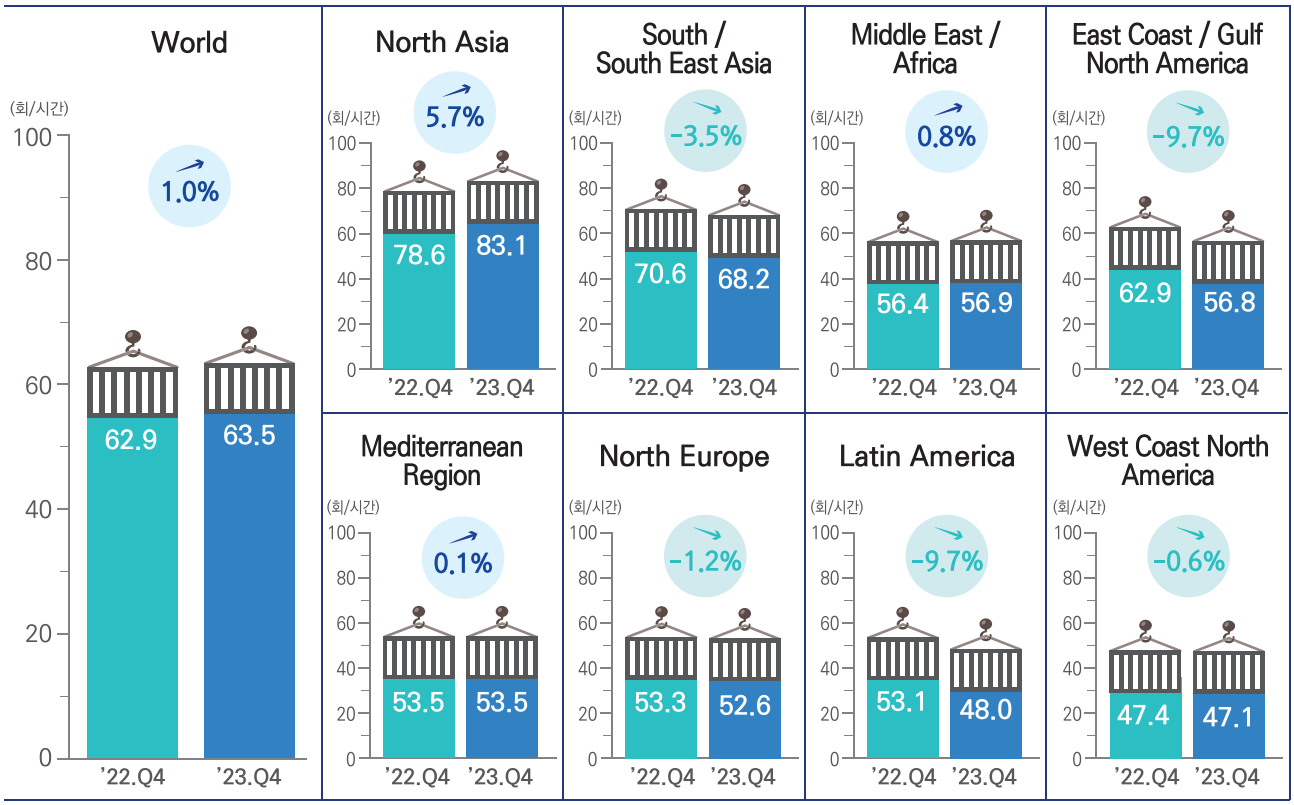
항만 연결성 지수



* 주 : 국내 주요 컨테이너 처리항만 및 2021년 기준 컨테이너 상위 20위 항만 중 지역별 배분을 고려하여 선정
* LA항, LB항, 뉴욕/뉴저지항의 경우 2023년 4분기 데이터 미발표에 따라 표기 제외함

선석 생산성 Berth Productivity

지역별 (전체 선형)



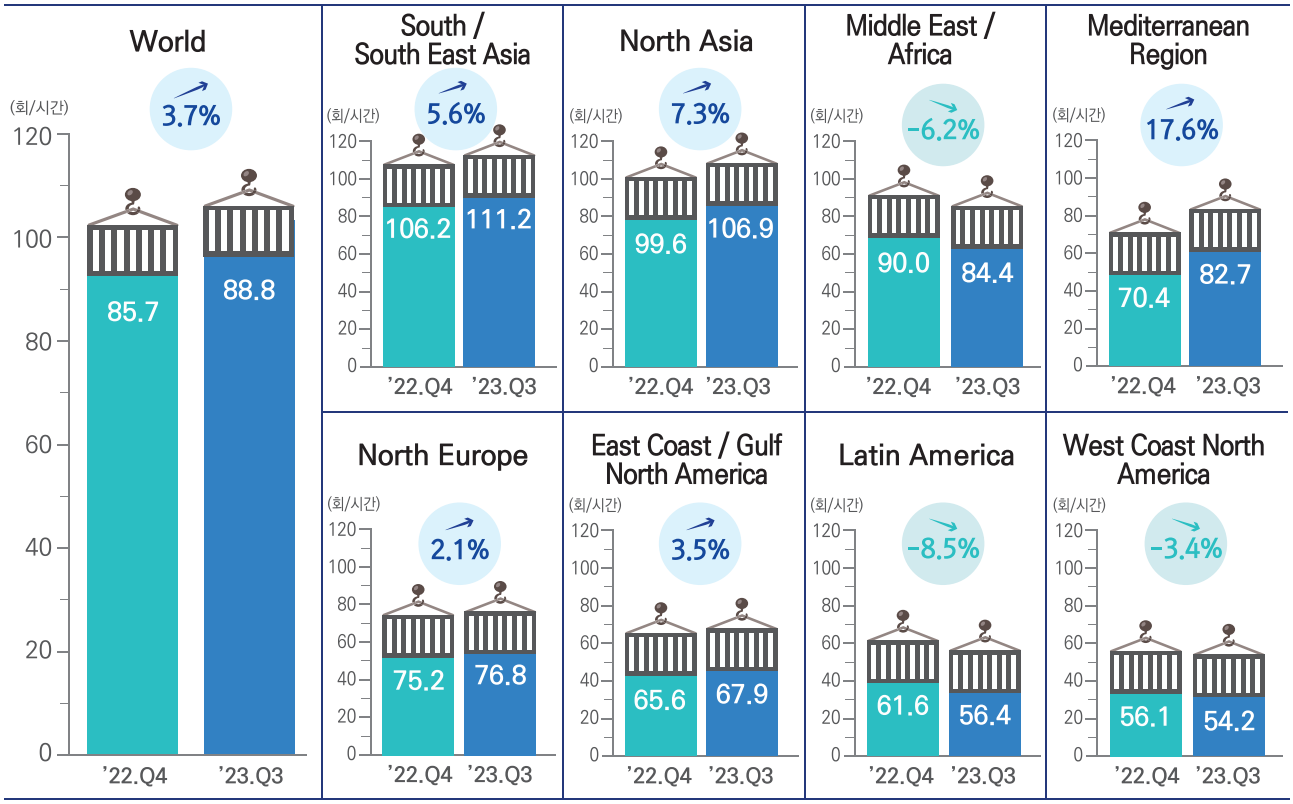
순위	지역	선석 생산성(회/시간)					전년 동기 대비	순위				
		'22.Q4	'23.Q1	'23.Q2	'23.Q3	'23.Q4		'22.Q4	'23.Q1	'23.Q2	'23.Q3	'23.Q4
1	North Asia	78.6	81.2	83.7	82.4	83.1	↑ 5.7%	1	1	1	1	1
2	South/South East Asia	70.6	69.7	66.5	67.9	68.2	↓ 3.5%	2	2	2	2	2
3	Middle East/Africa	56.4	56.8	57.7	57.4	56.9	↑ 0.8%	4	4	4	4	3
4	East Coast/Gulf North America	62.9	63.3	58.8	57.8	56.8	↓ 9.7%	3	3	3	3	4
5	Mediterranean Region	53.5	53.6	52.2	50.1	53.5	↑ 0.1%	5	7	7	7	5
6	North Europe	53.3	55.2	55.1	53.7	52.6	↓ 1.2%	6	5	5	5	6
7	Latin America	53.1	53.8	53.3	51.4	48.0	↓ 9.7%	7	6	6	6	7
8	West Coast North America	47.4	47.7	46.3	43.6	47.1	↓ 0.6%	8	8	8	8	8
World		62.9	65.4	64.5	63.5	63.5	↑ 1.0%	–	–	–	–	–

자료 : IHS Markit, 항만수요분석연구실 분석
주 : 전 세계 약 400여개 항만의 샘플 데이터를 기반으로 함

- '23년 4분기 전체 선형 기준 전 세계 선석생산성은 63.5회/hr로 전년 동기 대비 1.0% 소폭 증가함
- 북아시아 지역에서 전년 대비 5.7% 크게 증가하였으며, 북미 동안/걸프 지역에서는 같은 기간 9.7% 감소하며 올해 처음으로 1계단 하락한 4위를 기록함

선석 생산성 Berth Productivity

지역별 (8,000TEU 이상)



순위	지역	선석 생산성(회/시간)					전년 동기 대비	순위				
		'22.Q4	'23.Q1	'23.Q2	'23.Q3	'23.Q4		'22.Q4	'23.Q1	'23.Q2	'23.Q3	'23.Q4
1	South/South East Asia	106.2	109.4	105.7	108.6	112.1	↑5.6%	1	1	2	1	1
2	North Asia	99.6	103.2	106.5	106.0	106.9	↑7.3%	2	2	1	2	2
3	Middle East/Africa	90.0	89.4	84.7	89.4	84.4	↓6.2%	3	3	3	3	3
4	Mediterranean Region	70.4	78.1	78.7	78.1	82.7	↑17.6%	5	5	5	5	4
5	North Europe	75.2	78.3	79.7	78.8	76.8	↑2.1%	4	4	4	4	5
6	East Coast/Gulf North America	65.6	68.6	69.1	68.6	67.9	↑3.5%	6	6	6	6	6
7	Latin America	61.6	63.7	62.2	59.0	56.4	↓8.5%	7	7	7	7	7
8	West Coast North America	56.1	57.1	53.0	51.0	54.2	↓3.4%	8	8	8	8	8
World		85.7	89.2	89.3	88.6	88.8	↑3.7%	–	–	–	–	–

자료 : IHS Markit, 항만수요분석연구실 분석
주 : 전 세계 약 400여개 항만의 샘플 데이터를 기반으로 함

- 8,000TEU 이상 선형의 전 세계 선석생산성은 88.8회/hr로 전년 동기 대비 3.7%, 전 분기 대비 0.3% 증가함
- 중동/아프리카 지역의 경우 전체 선형에서는 전년 대비 증가세를 보인 반면, 8,000TEU 이상 선형에서는 6.2% 감소하여 8,000TEU 이상 선박에 대한 경쟁력이 약화됨
- 반면, 동남아시아의 경우 전체 선형에서는 전년 대비 3.5% 감소하였으나, 8,000TEU 이상 선형에서는 5.6% 증가하여 8,000TEU 이상 선박에 대한 경쟁력이 향상됨

선석 생산성 Berth Productivity

국가별 (전체 선형)

1위 오만





-7.0%

2위 중국





10.5%

3위 아랍에미레이트





-5.0%

4위 카타르

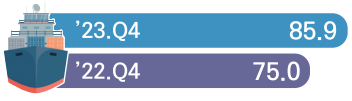




7.8%

5위 모로코

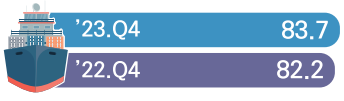




14.5%

6위 싱가포르

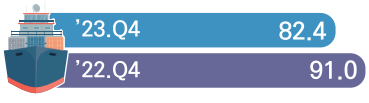




1.9%

7위 인도

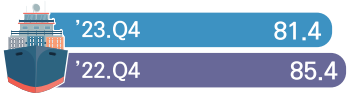




-9.5%

8위 스리랑카

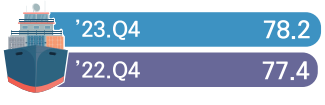




-4.7%

9위 베트남

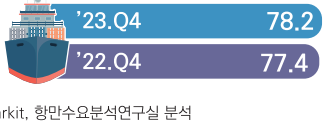




4.0%

10위 말레이시아

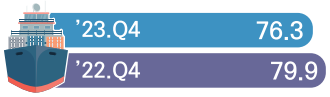




1.0%

11위 사우디아라비아

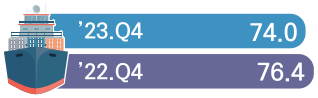




-4.5%

12위 대한민국

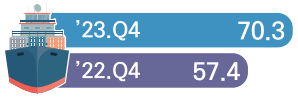




-3.2%

13위 요르단

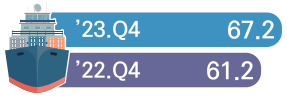




22.6%

14위 바레인

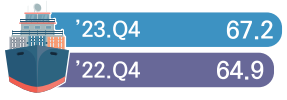




9.8%

15위 네덜란드

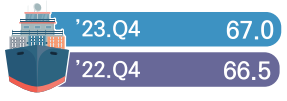




3.5%

16위 홍콩

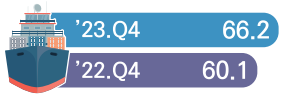




0.8%

17위 벨기에

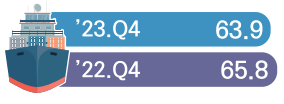




10.3%

18위 페루

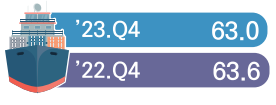




-2.8%

19위 이집트

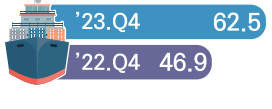




-0.9%

20위 덴마크





33.2%

자료 : IHS Markit, 항만수요분석연구실 분석
주 : 전 세계 약 400여개 항만의 샘플 데이터를 기반으로 함

- '23년 4분기 전체 선형의 국가별 선석생산성 상위 20위 중 **대한민국은 전년 동기 대비 3.2% 감소한 74.0회/hr를 기록함**
- 상위 20개 국가 중 **8개 국가는 전년 동기 대비 감소세를 기록**하였으며, **12개 국가는 증가세를 기록**함
- 특히, **모로코(+14.5%), 요르단(+22.6%) 등 중동 지역**의 국가를 비롯하여 **덴마크(+33.2%)에서 전년 대비 증가세**가 두드러지게 나타남

선석 생산성 Berth Productivity

국가별 (8,000TEU 이상)

1위 말레이시아



▲ 10.4%

2위 모로코



▲ 14.5%

3위 중국



▲ 11.6%

4위 베트남



▲ 4.0%

5위 싱가포르



▲ 3.3%

6위 인도



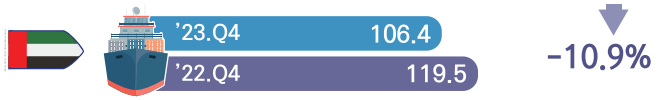
▲ 0.2%

7위 오만



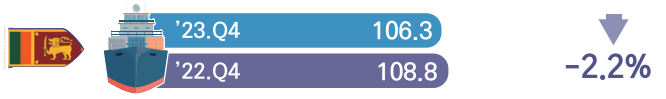
▼ -16.1%

8위 아랍에미레이트



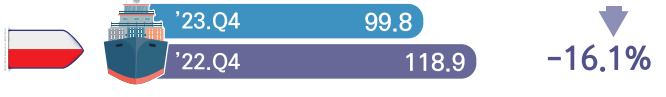
▼ -10.9%

9위 스리랑카



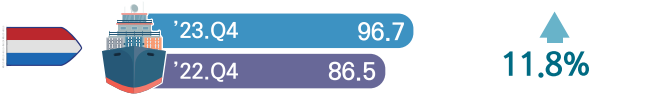
▼ -2.2%

10위 폴란드



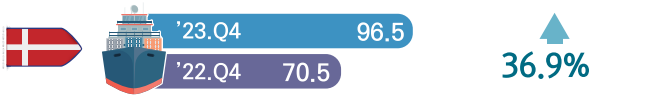
▼ -16.1%

11위 네덜란드



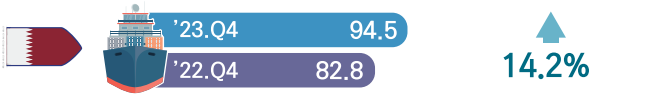
▲ 11.8%

12위 덴마크



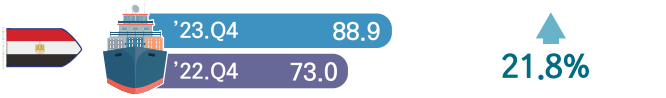
▲ 36.9%

13위 카타르



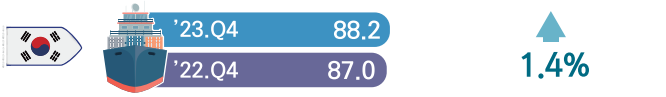
▲ 14.2%

14위 이집트



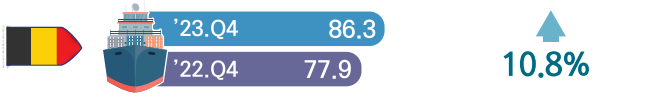
▲ 21.8%

15위 대한민국



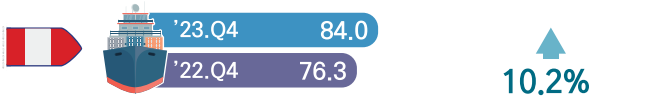
▲ 1.4%

16위 벨기에



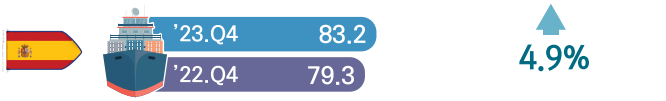
▲ 10.8%

17위 페루



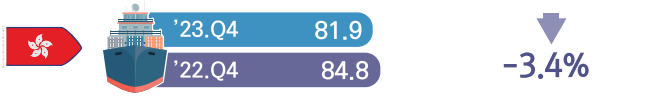
▲ 10.2%

18위 스페인



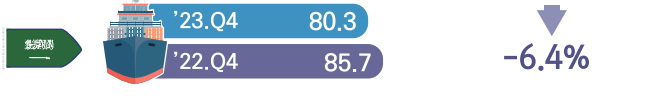
▲ 4.9%

19위 홍콩



▼ -3.4%

20위 사우디아라비아



▼ -6.4%

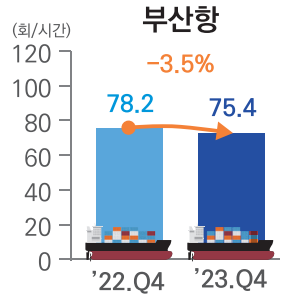
자료 : IHS Markit, 항만수요분석연구실 분석
주 : 전 세계 약 400여개 항만의 샘플 데이터를 기반으로 함

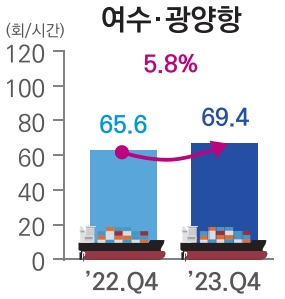
- 8,000TEU 이상 선형의 경우 **대한민국은 전년 동기 대비 1.4% 증가한 88.2회/hr를 기록**하였으며 **순위는 15위를 기록**
- '23년 4분기에도 **말레이시아가 꾸준히 1위 자리를 차지**하고 있으며, 상위 20개 국가 중 **6개 국가만이 전년 동기 대비 감소세를 기록**
- 8,000TEU 이상 선형에서는 전체 선형에서와 달리 **오만(-16.1%), 아랍에미리트(-10.9%) 등 중동 지역에서 감소세**가 나타남

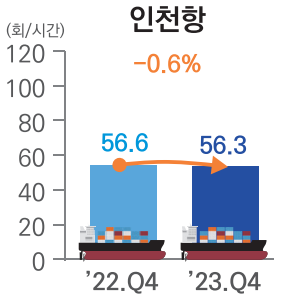
선석 생산성 Berth Productivity

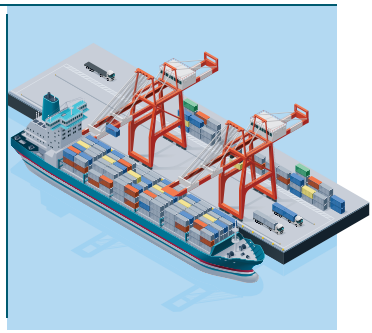
항만별 (전체 선형)

국내 주요 항만 선석 생산성

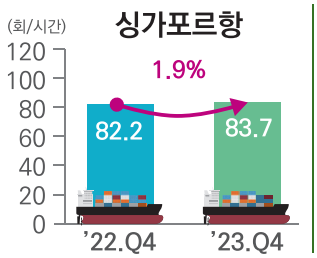


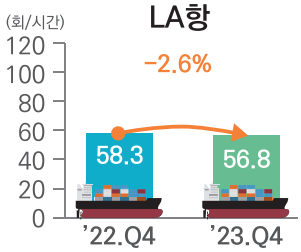


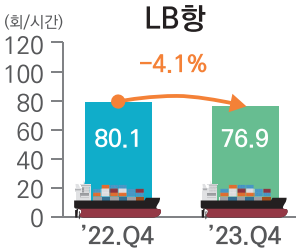


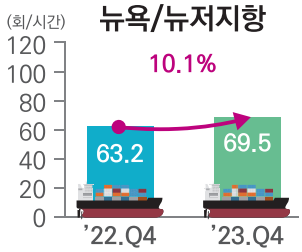


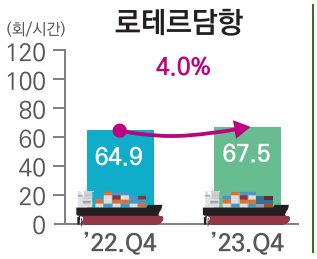
세계 주요 항만 선석생산성

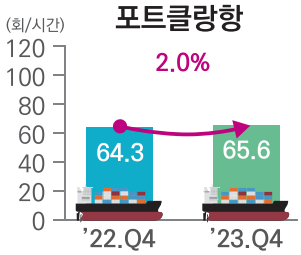


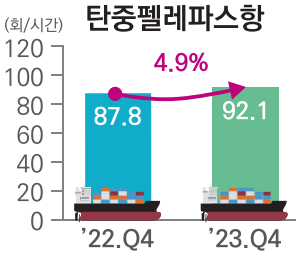


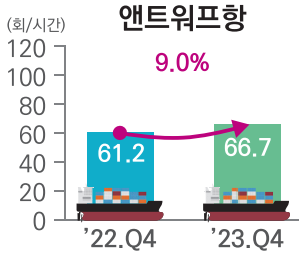


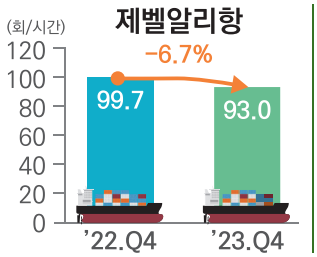


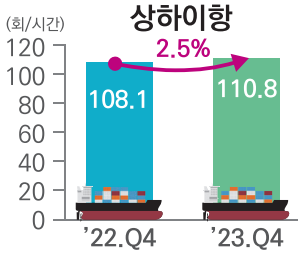


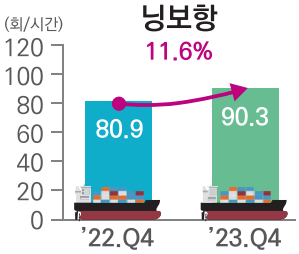


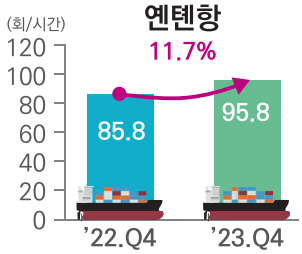


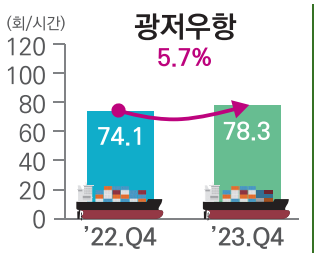


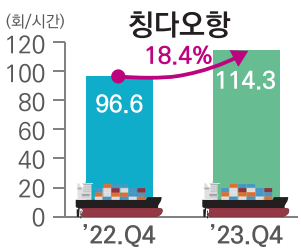


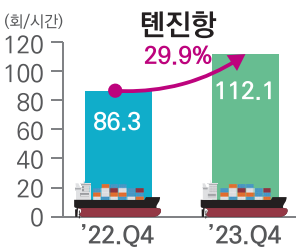


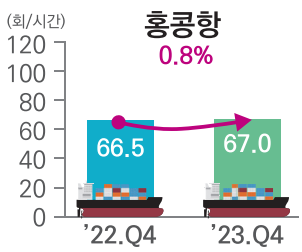








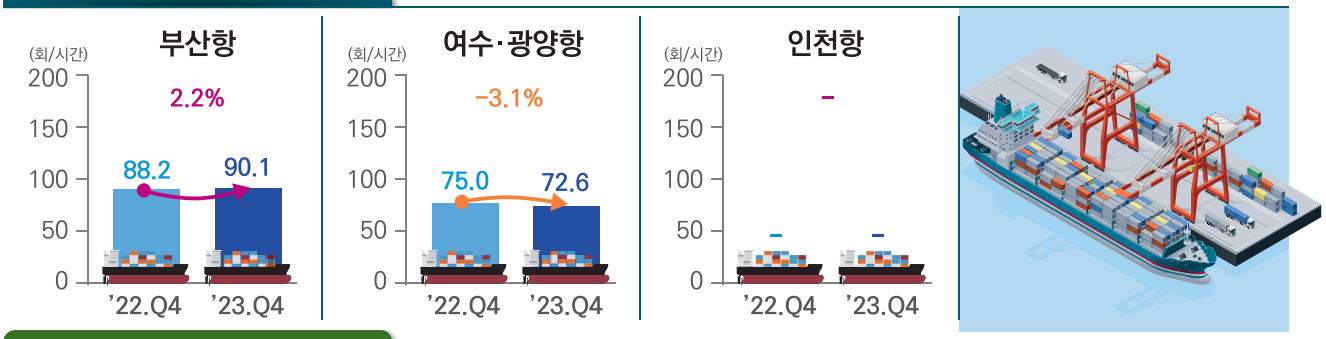




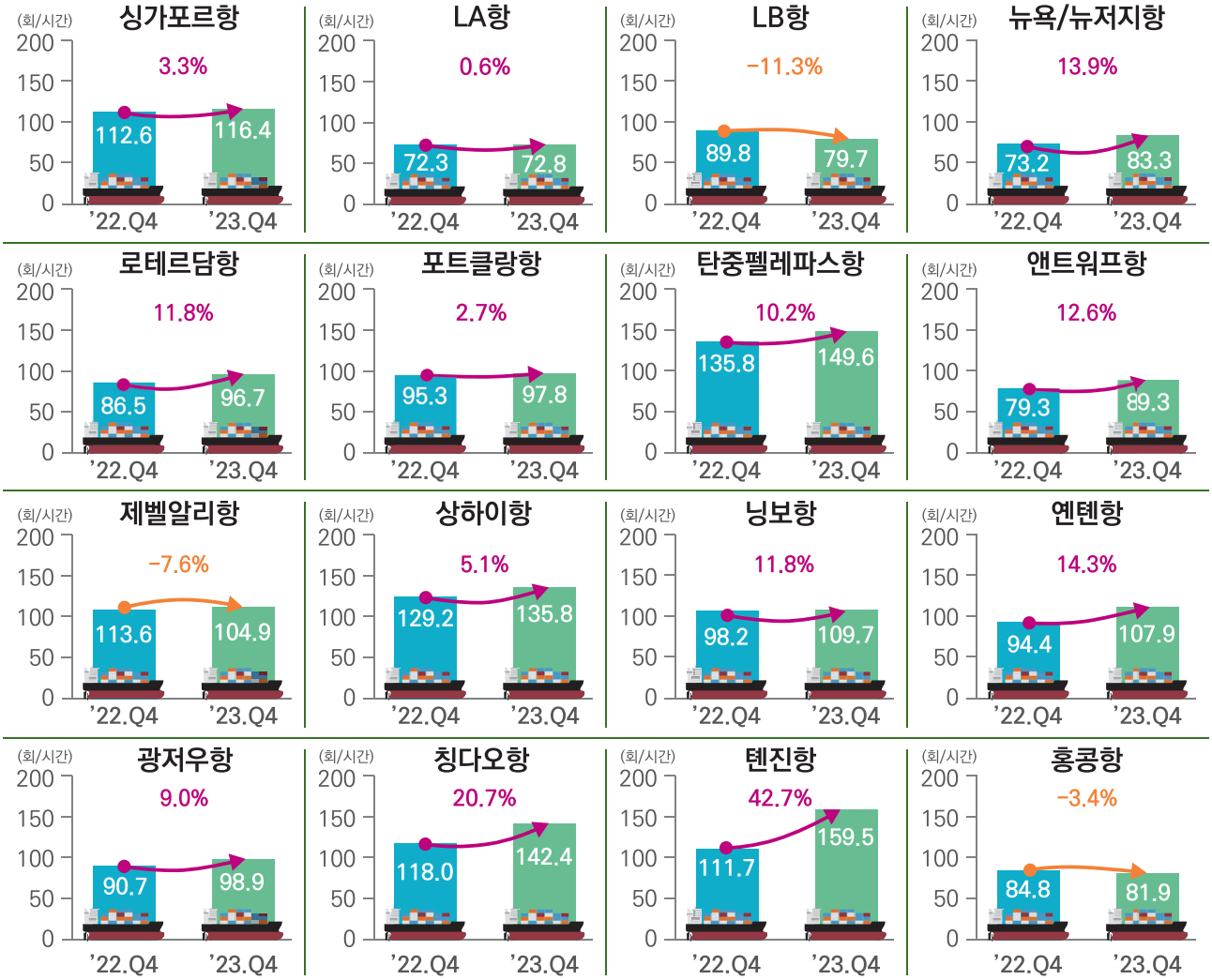
- '23년 4분기 국내 주요 항만의 전체 선형 선석생산성은 부산항(-3.5%), 인천항(-0.6%)은 전년 동기 대비 하락세를 기록한 반면, 광양항(+5.8%)은 증가세를 기록함
- 세계 주요 항만의 경우 LA항(-2.6%), LB항(-4.1%), 제벨알리항(-6.7%)을 제외하고 모두 전년 동기 대비 증가세를 기록함
- 특히 중국의 톈진항(+29.9%)과 칭다오항(+18.4%)이 크게 증가하면서 '22년 이후 100회/hr 이상을 꾸준히 기록중임

항만별 (8,000TEU 이상)

국내 주요 항만 선석 생산성



세계 주요 항만 선석생산성

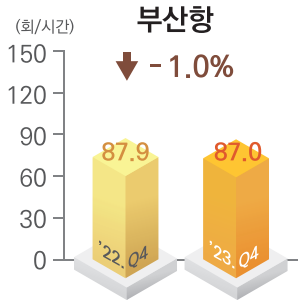


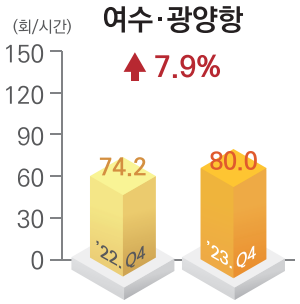
- 국내 주요 항만의 8,000TEU 이상 선형 선석생산성은 부산항(+2.2%)은 전년 동기 대비 증가세를 기록하였으나, 광양항(-3.1%)은 감소세를 기록함
- 부산항의 경우 전체 선형에서는 전년 대비 감소세를 기록하였으나 8,000TEU 이상 선형 부문에서는 증가세 를 기록, 광양항은 오히려 8,000TEU 이상 선형에 대해 감소세를 기록함
- 세계 주요 항만의 경우의 경우 LB항(-11.3%), 제벨알리항(-7.6%), 홍콩항(-3.4%)을 제외하고 8,000TEU 이상 선형에 대한 선석생산성이 전년 동기 대비 증가함
- 전체 선형에서와 마찬가지로 중국의 톈진항(+42.7%), 칭다오항(+20.7%)이 큰 폭으로 증가함

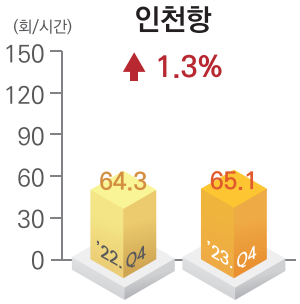
순선석 생산성 Net Berth Productivity

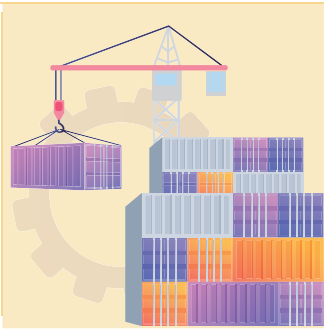
항만별 (전체 선형)

국내 주요 항만의 순선석 생산성

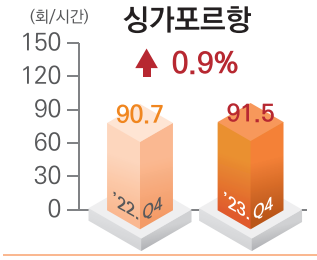


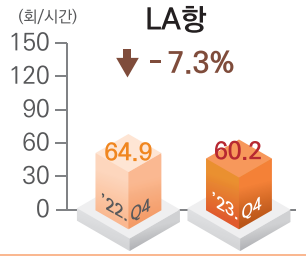


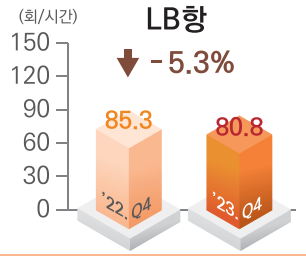


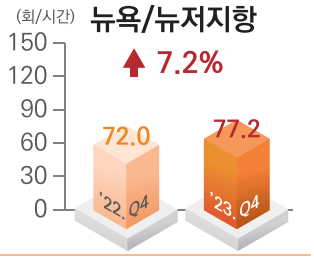


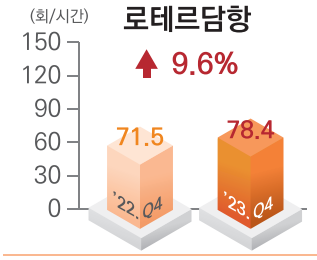
세계 주요 항만의 순선석 생산성

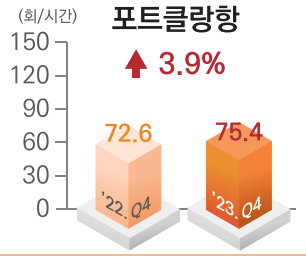


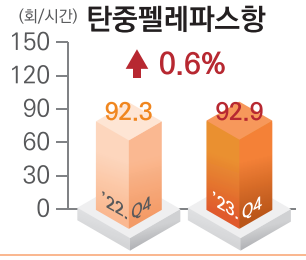


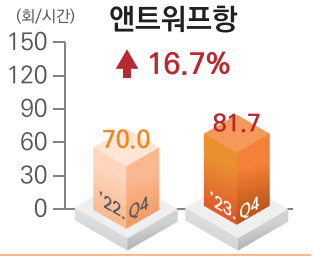


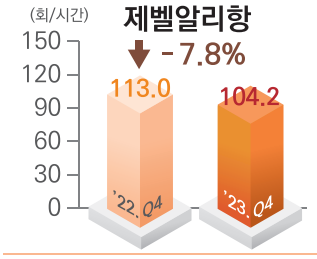


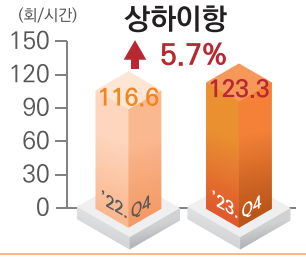


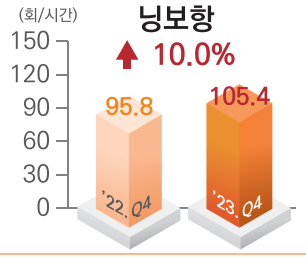


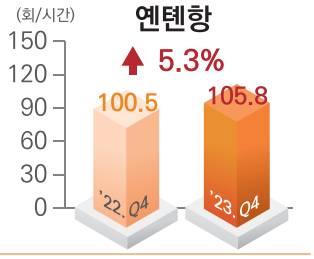


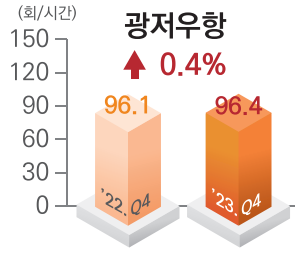


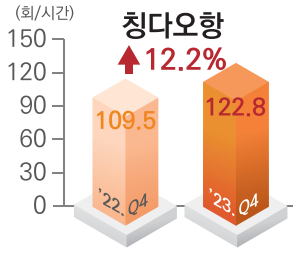


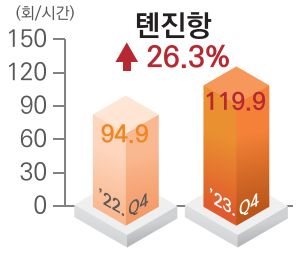


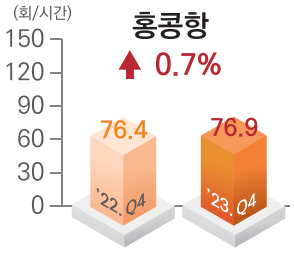










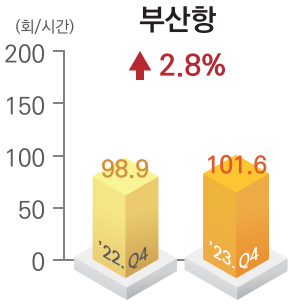


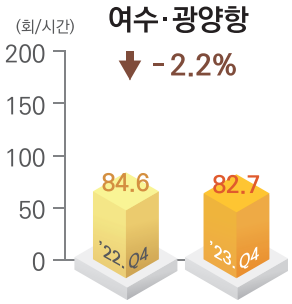
- '23년 4분기 국내 주요 항만의 전체 선형 순선석 생산성은 부산항(-1.0%)은 전년 동기 대비 감소하였으나, 광양항(+7.9%), 인천항(+1.3%)은 증가세를 기록함
- 세계 주요 항만의 경우 LA항(-7.3%), LB항(-5.3%), 제벨알리항(-7.8%)을 제외하고 모두 전년 동기 대비 증가세를 기록함
- 순선석 생산성 역시 중국의 톈진항(+26.3%)과 칭다오항(12.2%)이 높게 나타났으며, 벨기에의 앤트워프항(+16.7%) 역시 두 자릿수 이상 증가세를 나타냄

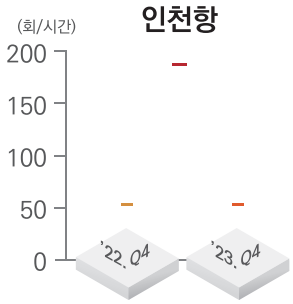
순선석 생산성 Net Berth Productivity

항만별 (8,000TEU 이상)

국내 주요 항만의 순선석 생산성

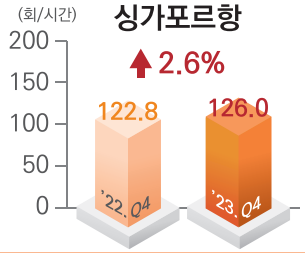


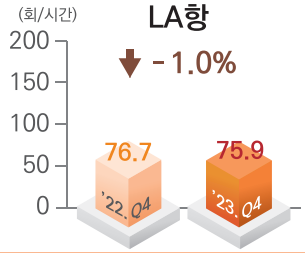


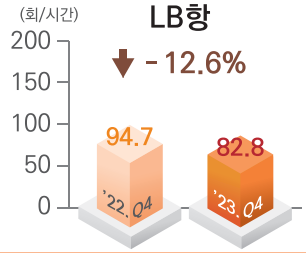


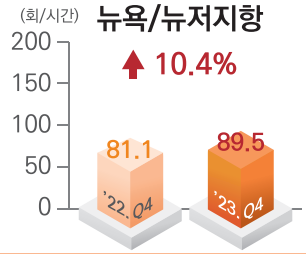


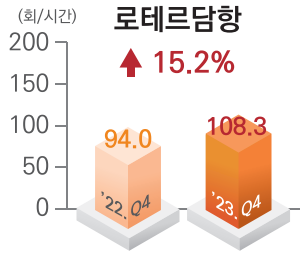
세계 주요 항만의 순선석 생산성

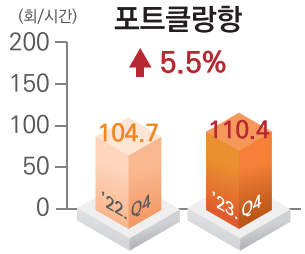


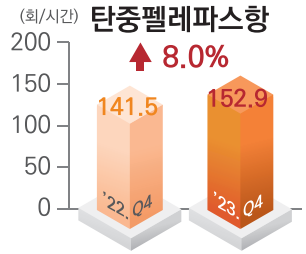


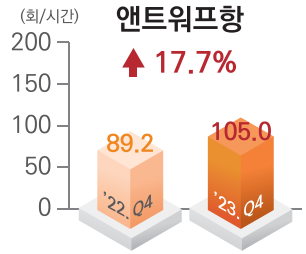


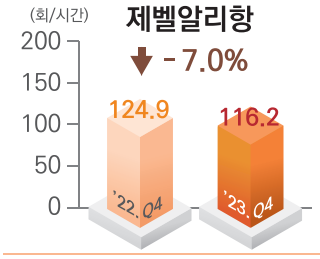


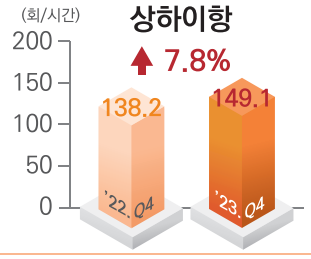


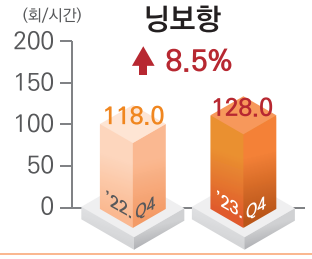


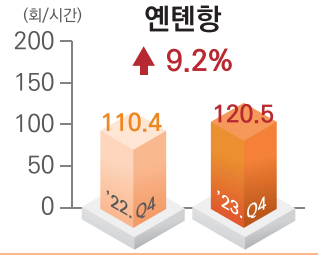


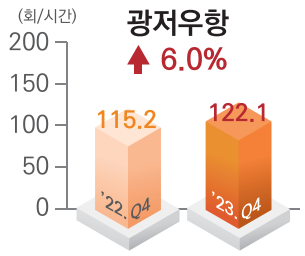


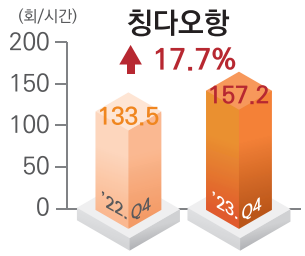


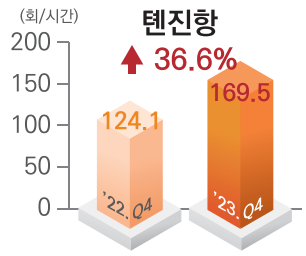


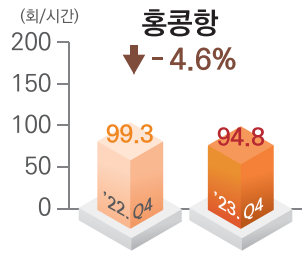










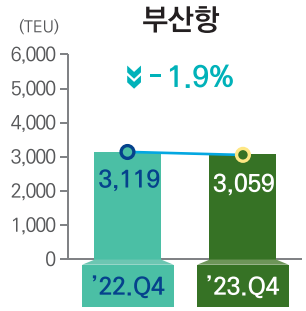


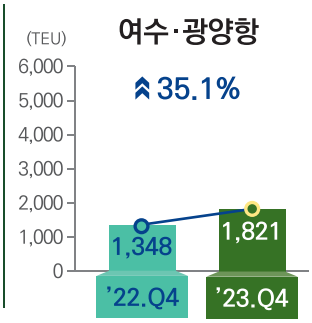
- 국내 주요 항만의 8,000TEU 이상 선형 순선석 생산성은 부산항(+2.8%)은 전년 동기 대비 증가세를 기록하였으나 광양항(-2.2%)은 하락세를 기록함
- 전체 선형의 순선석 생산성과 비교하면 부산항은 8,000TEU 이상 선형에서 강세를 보인 반면 광양항은 약세를 나타냄
- 세계 주요 항만의 경우 4개 항만을 제외하고 전년 동기 대비 증가세를 기록하였으며, 뉴욕/뉴저지항(+10.4%), 로테르담항(+15.2%), 앤트워프항(+17.7%), 칭다오항(+17.7%), 톈진항(+36.6%)은 두 자릿수 이상 증가세를 나타냄

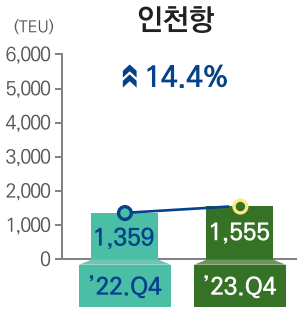
평균 하역량 Average Container Throughput

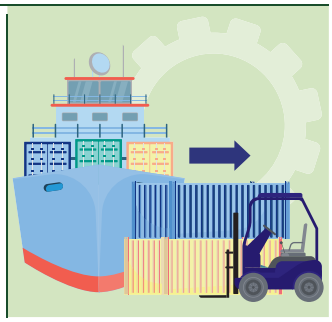
항만별 (전체 선형)

국내 주요 항만 평균 하역량

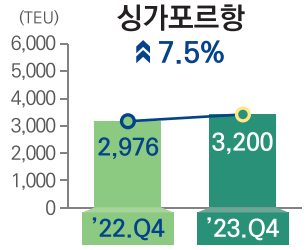


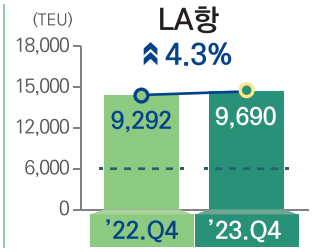


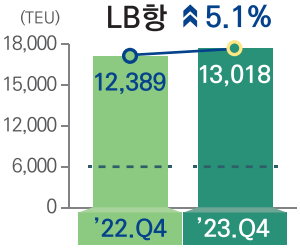


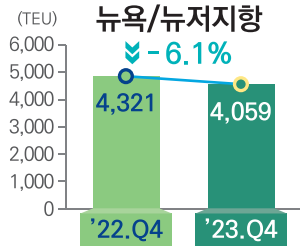


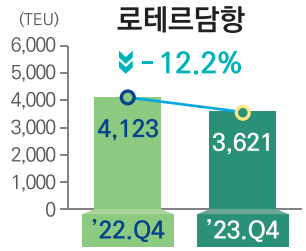
세계 주요 항만 평균 하역량

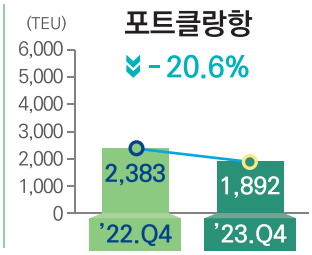


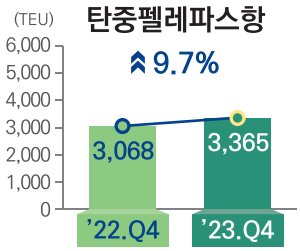


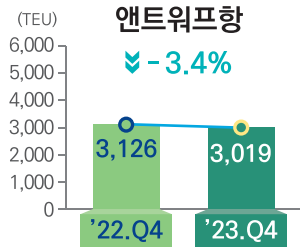


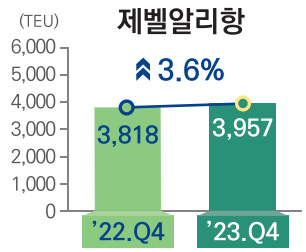


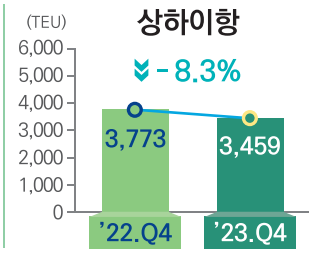


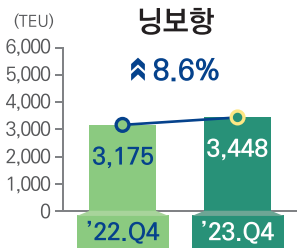


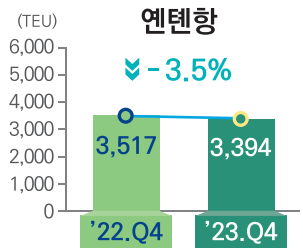


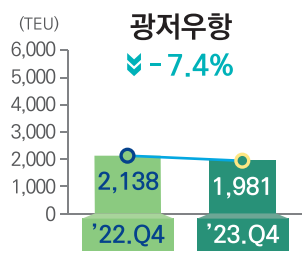


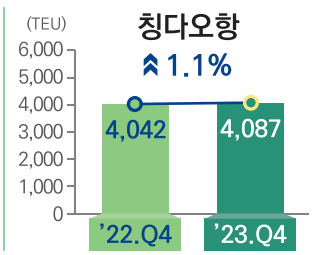


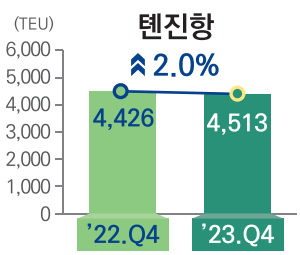


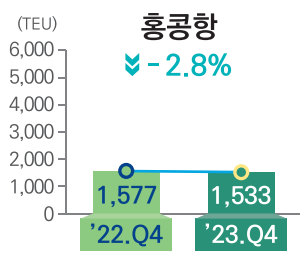










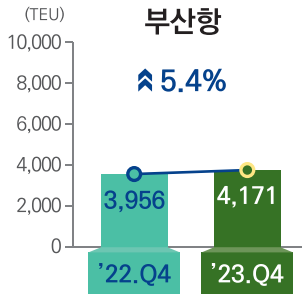


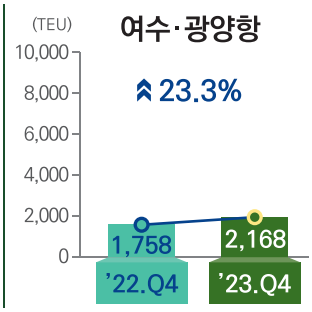
- '23년 4분기 국내 주요 항만의 전체 선형 기준 평균 하역량은 부산항(-1.9%)은 전년 동기 대비 감소세를 기록, 광양항(+35.1%), 인천항(+14.4%)은 전년 동기 증가세를 기록함
- 세계 주요 항만의 평균 하역량은 8개 항만에서 전년 대비 하락세를 나타냈으며, 8개 항만은 증가세를 기록함
- 그 중 두 자릿수 이상 증감률을 나타낸 항만은 로테르담항(-12.2%), 포트클랑항(-20.6%)으로 감소세가 크게 나타남

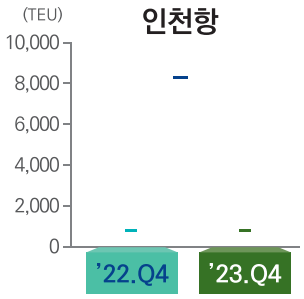
평균 하역량 Average Container Throughput

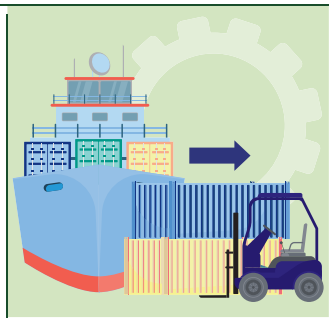
항만별 (8,000TEU 이상)

국내 주요 항만 평균 하역량

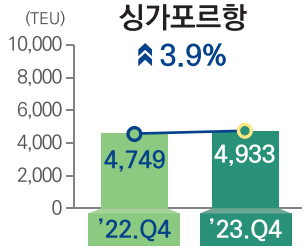


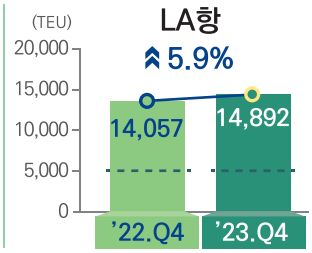


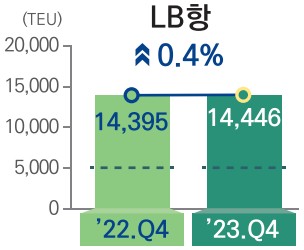


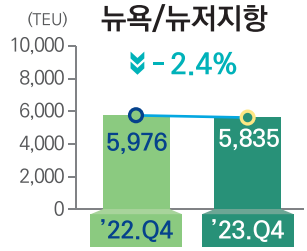


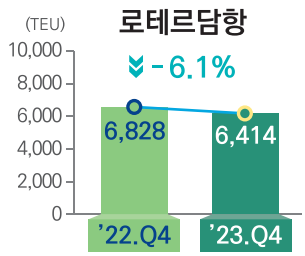
세계 주요 항만 평균 하역량

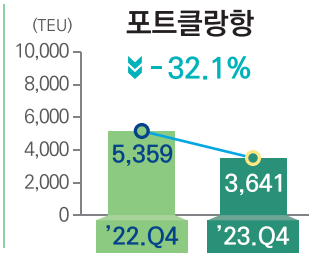


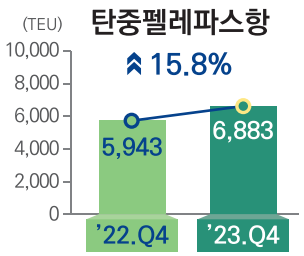


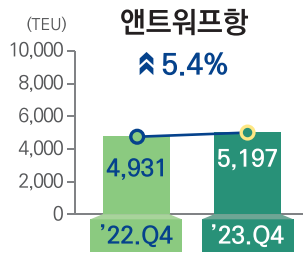


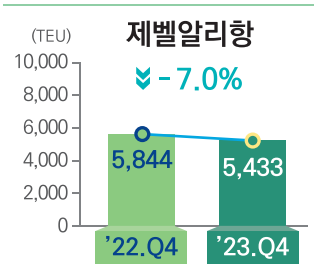


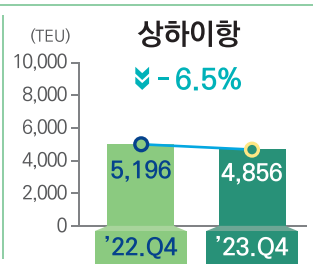


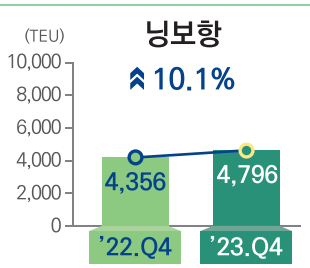


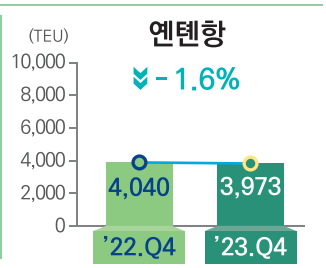


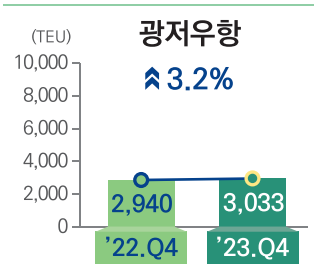


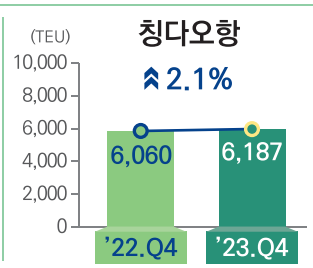


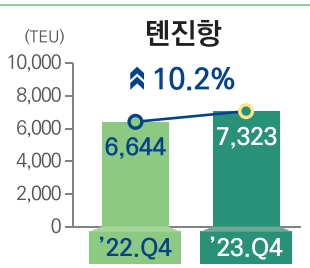


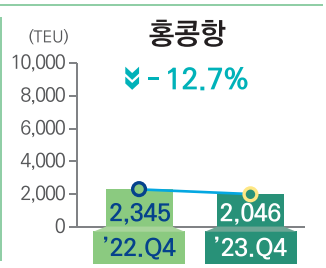












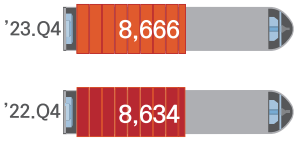
- 국내 주요 항만의 8,000TEU 이상 선형의 평균 하역량은 **부산항(+5.4%), 광양항(+23.3%) 모두 전년 동기 대비 증가세**를 기록함
- **부산항의 경우 전체 선형에서의 평균 하역량은 감소**하였으나, **8,000TEU 이상 선형의 평균 하역량은 증가함**
- 8,000TEU 이상 선형의 **평균 하역량 증가 항만은 총 16개 항만 중 9개, 감소항만은 7개**로 나타났으며, 그 중 **포트클랑항(-32.1%), 홍콩항(-12.7%)이 두 자릿수 이상 감소세**를 나타냄

평균 선형 Average Vessel Size

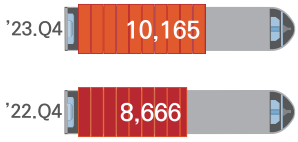
항만별 (전체 선형)

국내 주요 항만 평균 선형

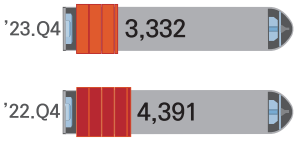
부산항 ↗ 0.4%



여수·광양항 ↗ 17.3%



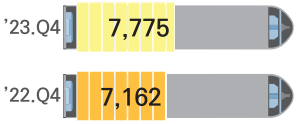
인천항 ↘ -24.1%



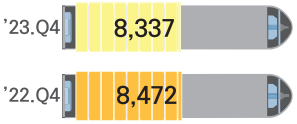


세계 주요 항만 평균 선형

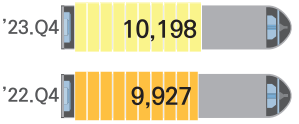
싱가포르항 ↗ 8.6%



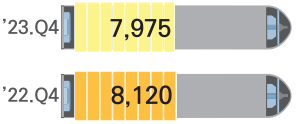
LA항 ↘ -1.6%



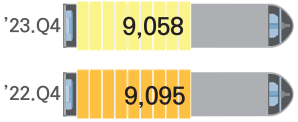
LB항 ↗ 2.7%



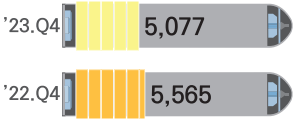
뉴욕/뉴저지항 ↘ -1.8%



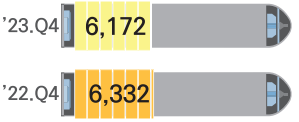
로테르담항 ↘ -0.4%



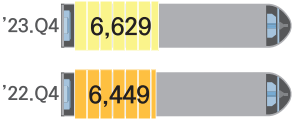
포트클랑항 ↘ -8.8%



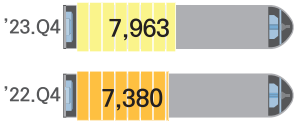
탄중펠레파스항 ↘ -2.5%



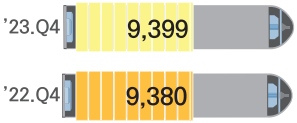
앤트워프항 ↗ 2.8%



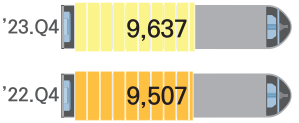
제벨알리항 ↗ 7.9%



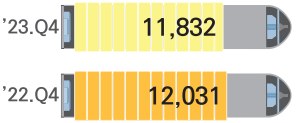
상하이항 ↗ 0.2%



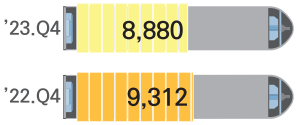
닝보항 ↗ 1.4%



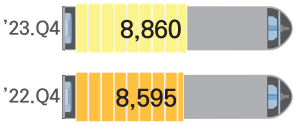
옌톈항 ↘ -1.7%



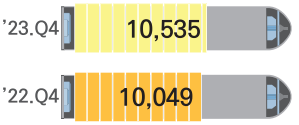
광저우항 ↘ -4.6%



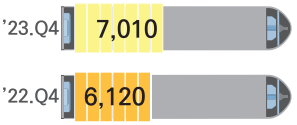
칭다오항 ↗ 3.1%



톈진항 ↗ 4.8%



홍콩항 ↗ 14.5%



- '23년 4분기 국내 주요 항만의 평균 선형은 부산항(+0.4%)과 광양항(+17.3%)은 전년 동기 대비 증가세를 기록하였으며 같은 기간 인천항은 24.1% 감소함
- 세계 주요 항만의 평균 선형의 경우 총 16개 항만 중 7개 항만이 전년 동기 대비 감소세, 9개 항만은 증가세를 기록하였으나 대부분 증감율이 크게 변화하지는 않음
- 단, 홍콩항의 경우 평균 선형이 전년 대비 14.5% 증가한 7,010TEU를 기록함

평균 선형 Average Vessel Size

항만별 (8,000TEU 이상)

국내 주요 항만 평균 선형

부산항 ↗ 5.0%

'23.Q4	12,842
'22.Q4	12,234

여수·광양항 ↘ -9.3%

'23.Q4	12,538
'22.Q4	13,822

인천항 -

'23.Q4	-
'22.Q4	-



세계 주요 항만 평균 선형

싱가포르항 ↗ 5.1%

'23.Q4	13,762
'22.Q4	13,098

LA항 ↘ -2.0%

'23.Q4	11,458
'22.Q4	11,693

LB항 ↘ -0.6%

'23.Q4	11,045
'22.Q4	11,109

뉴욕/뉴저지항 ↘ -0.3%

'23.Q4	10,520
'22.Q4	10,555

로테르담항 ↗ 8.6%

'23.Q4	15,952
'22.Q4	14,682

포트클랑항 ↗ 1.1%

'23.Q4	13,433
'22.Q4	13,289

탄중펠레파스항 ↗ 1.7%

'23.Q4	14,014
'22.Q4	13,778

앤트워프항 ↗ 8.3%

'23.Q4	13,467
'22.Q4	12,431

제벨알리항 ↗ 0.7%

'23.Q4	13,023
'22.Q4	12,931

상하이항 ↗ 3.2%

'23.Q4	14,026
'22.Q4	13,592

닝보항 ↗ 3.6%

'23.Q4	13,592
'22.Q4	13,121

옌톈항 ↘ -0.8%

'23.Q4	14,043
'22.Q4	14,154

광저우항 ↗ 8.6%

'23.Q4	14,854
'22.Q4	13,673

칭다오항 ↗ 2.4%

'23.Q4	13,851
'22.Q4	13,523

톈진항 ↗ 3.2%

'23.Q4	17,342
'22.Q4	16,796

홍콩항 ↗ 7.8%

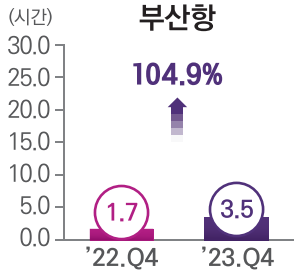
'23.Q4	12,412
'22.Q4	11,514

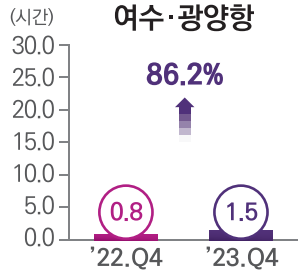
- 국내 주요 항만의 8,000TEU 이상 선형 기준 평균 선형은 부산항(+5.0%)은 전년 동기 대비 증가하였으나, 같은 기간 광양항(-9.3%)은 감소세를 기록
- 세계 주요 항만의 8,000TEU 이상 선형 기준 평균 선형은 총 16개 항만 중 4개 항만만이 전년 동기 대비 감소세를 기록하면서, 대부분 선형이 증가함
- 다만, 두 자릿수 이상 증가율 폭이 나타나지 않는 등 큰 변동 없이 전년과 유사한 수준을 나타내고 있음

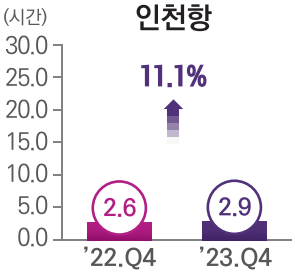
평균 대기시간 Average Waiting Time

항만별 (전체 선형)

국내 주요 항만 평균 대기시간

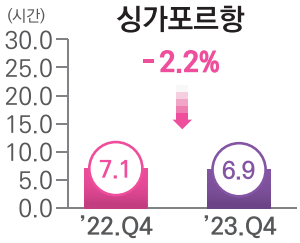


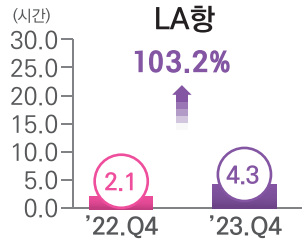


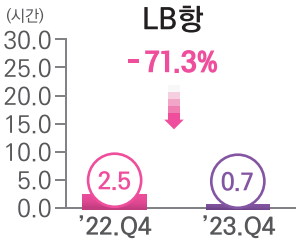


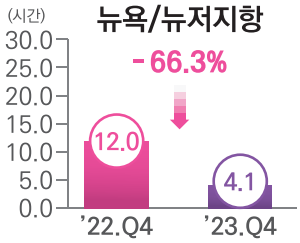


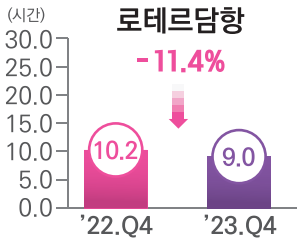
세계 주요 항만 평균 대기시간

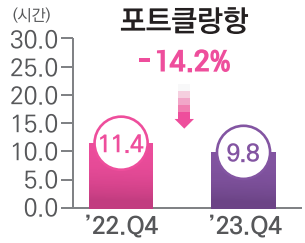


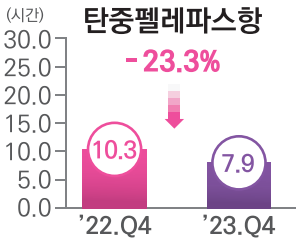


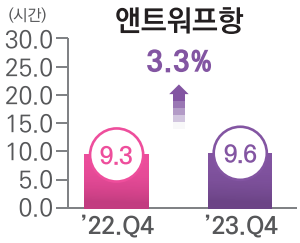


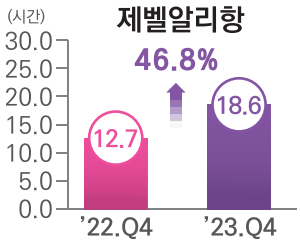


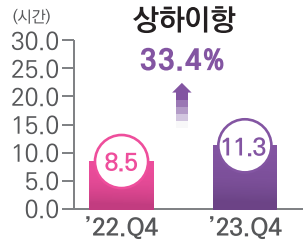


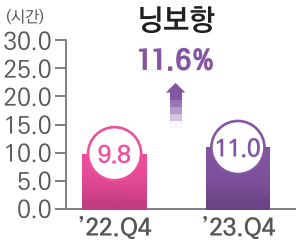


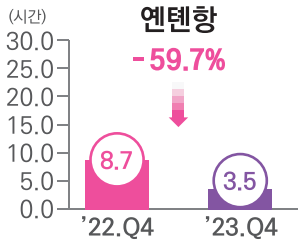


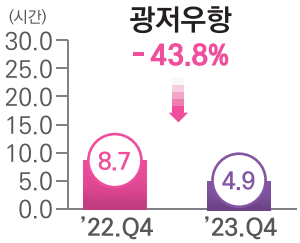


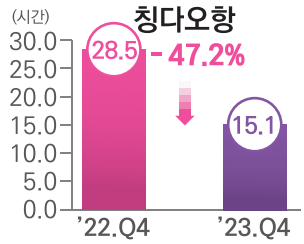


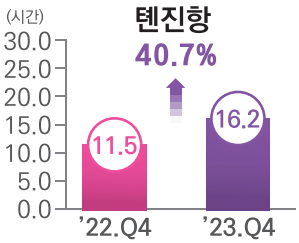


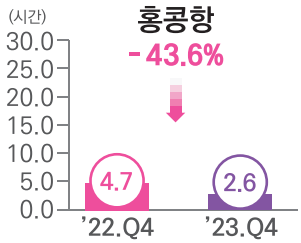










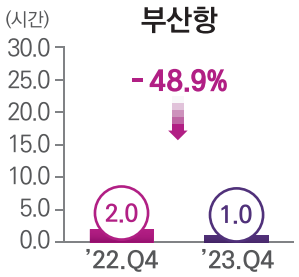


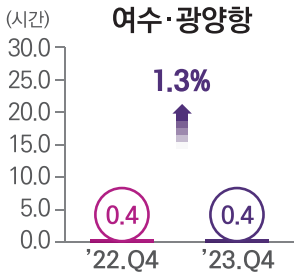
- '23년 4분기 국내 주요 항만의 평균 대기시간은 부산항이 3.5시간, 광양항이 1.5시간, 인천항이 2.9시간으로 나타나면서, 모두 전년 동기 대비 대기시간이 증가함
- 세계 주요 항만의 평균 대기시간은 총 16개 항만 가운데 10개 항만은 대기시간이 감소하였으며, 6개 항만은 대기시간이 증가함
- 특히 LA항(+2.2hr), 제벨알리항(+5.9hr), 상하이항(+2.8hr), 톈진항(+4.7hr)의 대기시간이 전년 동기 대비 크게 증가함

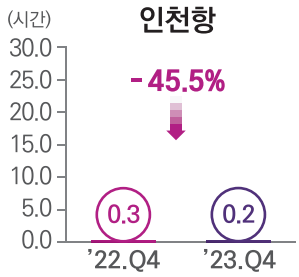
평균 대기시간 Average Waiting Time

항만별 (8,000TEU 이상)

국내 주요 항만 평균 대기시간

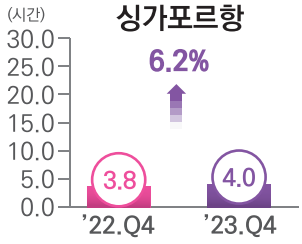


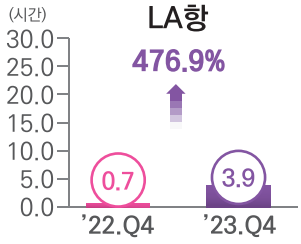


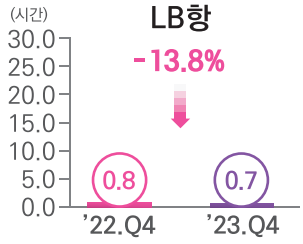


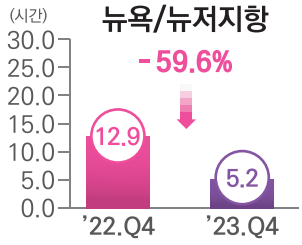


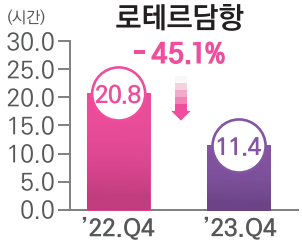
세계 주요 항만 평균 대기시간

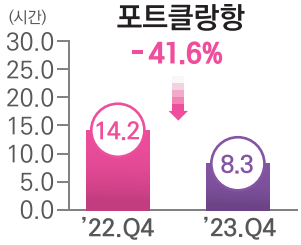


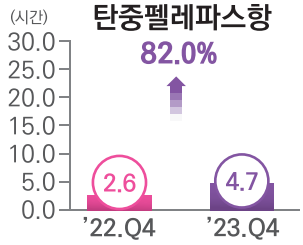


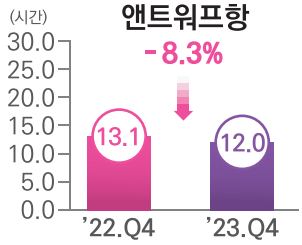


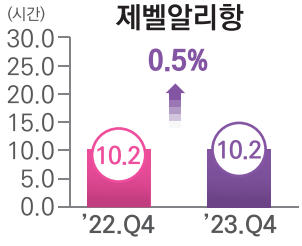


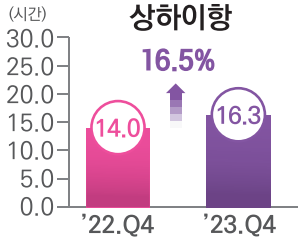


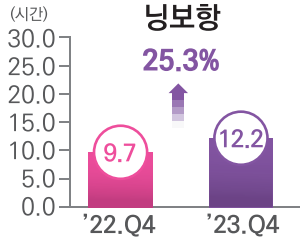


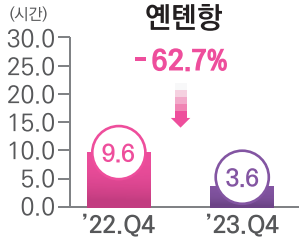


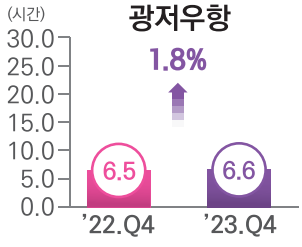


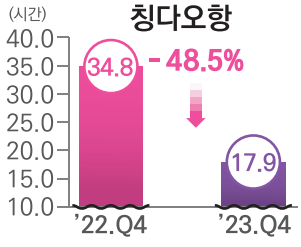


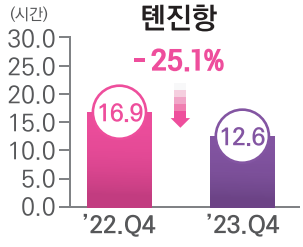


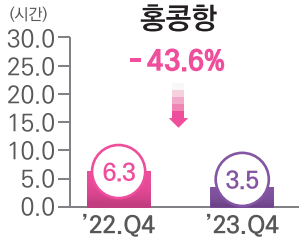










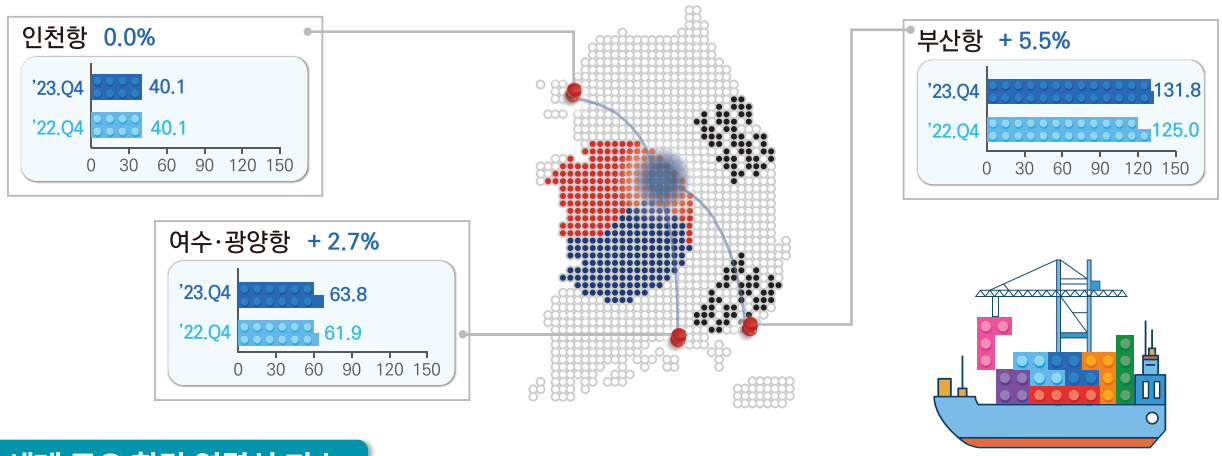


- 8,000TEU 이상 선형 기준 국내 주요 항만의 평균 대기시간은 부산항과 인천항은 전년 동기 대비 대기시간이 감소하여 각각 1.0hr, 0.2hr를 기록하였으며, 광양항은 전년 동기 대비 유사한 수준을 기록함
- 세계 주요 항만의 8,000TEU 이상 선형의 평균 대기시간은 총 16개 항만 가운데 9개 항만은 감소하였으며, 7개 항만은 대기시간이 증가함
- 특히, 칭다오항(-16.9hr)과 로테르담항(-9.4hr)에서 대기시간의 개선이 두드러지게 나타남

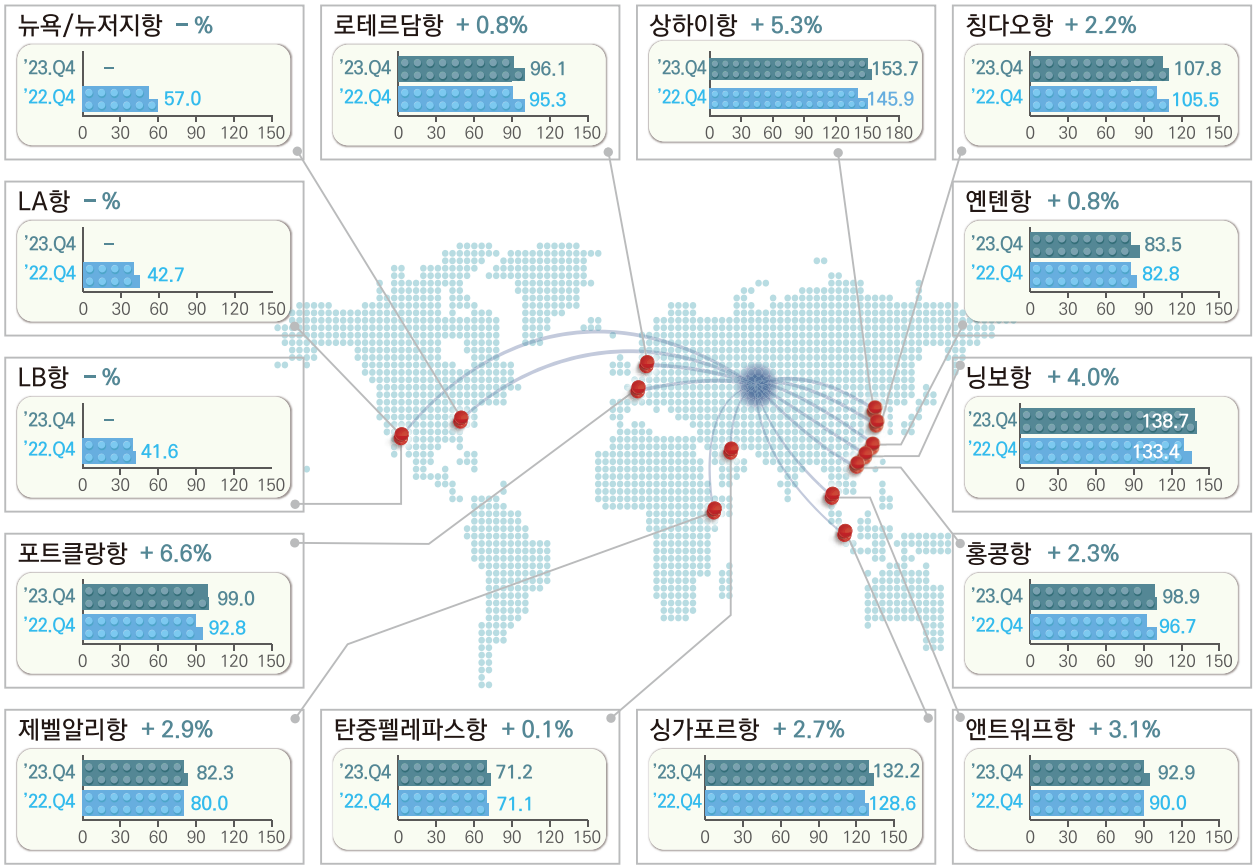
항만 연결성 지수

Port Liner Shipping Connectivity Index

국내 주요 항만 연결성 지수



세계 주요 항만 연결성 지수



* LA항, LB항, 뉴욕/뉴저지항의 경우 2023년 4분기 데이터 미발표에 따라 표기 제외함

- 국내 항만의 항만연결성 지수는 부산항이 전년 대비 5.5% 증가하여 지난해와 같이 세계 4위를 기록하였으며, 광양항은 같은 기간 3.1% 증가, 인천항은 유사한 수준을 기록함
- 항만연결성 지수는 모든 항만에서 전년 동기 대비 증가세를 기록하였으며, 특히 포트클랑항(+6.6%), 상하이항(+5.3%), 닝보항(+4.0%)의 증가세가 높게 나타남

연구책임자

최석우 항만수요분석연구실장

연구진

하태영 항만수요분석연구실 연구위원
이기열 항만수요분석연구실 연구위원
이수영 항만수요분석연구실 전문연구원
이화섭 항만수요분석연구실 전문연구원
신정훈 항만수요분석연구실 전문연구원
이나영 항만수요분석연구실 전문연구원
김영훈 항만수요분석연구실 전문연구원
조성현 항만수요분석연구실 연구원

감 리

김근섭 항만연구본부 본부장

세계 컨테이너 **항만 서비스 지표** 2023년 4분기

발행일 2024년 2월 27일
편집·발행인 **김종덕** 원장
발행처 한국해양수산개발원 항만연구본부 **항만수요분석연구실**
49111 부산광역시 영도구 해양로 301번길 26(동삼동)
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