

New Orleans cut off from direct Europe services

The pandemic materially changed the total number of port-pair connections on the Europe-North America East Coast (NAEC) trade. In the first half of 2019, the total number of port-pair connections were relatively stable, hovering within 600-800 connections. The pandemic, however, seems to have hit NEUR-NAEC the most, as the total number of connections dropped significantly, before increasing back to the pre-pandemic level in 2023. MED-NAEC did not exhibit the same decline, and post-pandemic, there is a clear level shift in favour of MED-NAEC, with the post-pandemic figure slightly higher than the pre-pandemic baseline.

In terms of distinct connections (where one port-pair connection is counted once and not impacted by the number of times that connection is made/called) the pandemic accelerated the pre-pandemic increasing trend for MED-NAEC. Compared to the same time-period in 2019, distinct connections on MED-NAEC increased by 26% in 2023, whereas for NEUR-NAEC, the increase was lower at 18%.

Fig. 1: Change in Port-Port Connections

| Port Name | Lost | Gained | Net Change |
|--------------|------|--------|------------|
| Saint John | 0 | 12 | 12 |
| Boston | 0 | 6 | 6 |
| Halifax | 0 | 5 | 5 |
| Jacksonville | 0 | 4 | 4 |
| Wilmington | 0 | 4 | 4 |
| Montreal | 0 | 3 | 3 |
| Charleston | 4 | 1 | -3 |
| Houston | 3 | 0 | -3 |
| New Orleans | 9 | 0 | -9 |

Even though distinct port-pair connections increased for both trades compared to pre-pandemic, the change was not similar across the board. When we compare 2023 to 2019, New Orleans lost 9 direct connections to Europe and gained none, effectively cutting it off from any direct services originating in Europe. Saint John on the other hand was the largest beneficiary, gaining 12 direct port-pair connections from

Europe, having previously not been connected at all. Figure 1 shows a summary of the most significant positive and negative changes in direct port-pair connections on Europe-North America East Coast.

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All quotes can be attributed to: Alan Murphy, CEO, Sea-Intelligence.

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