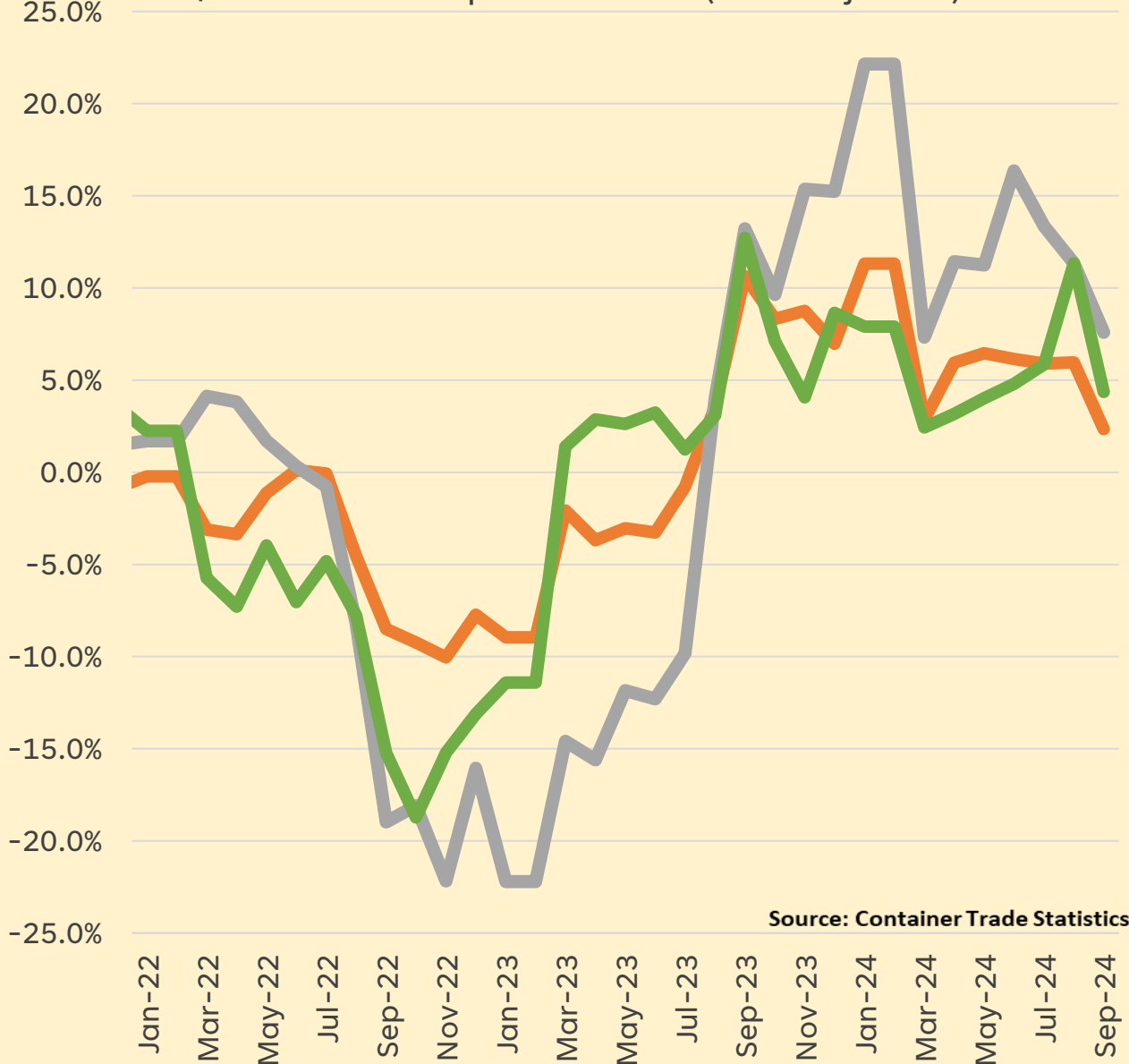


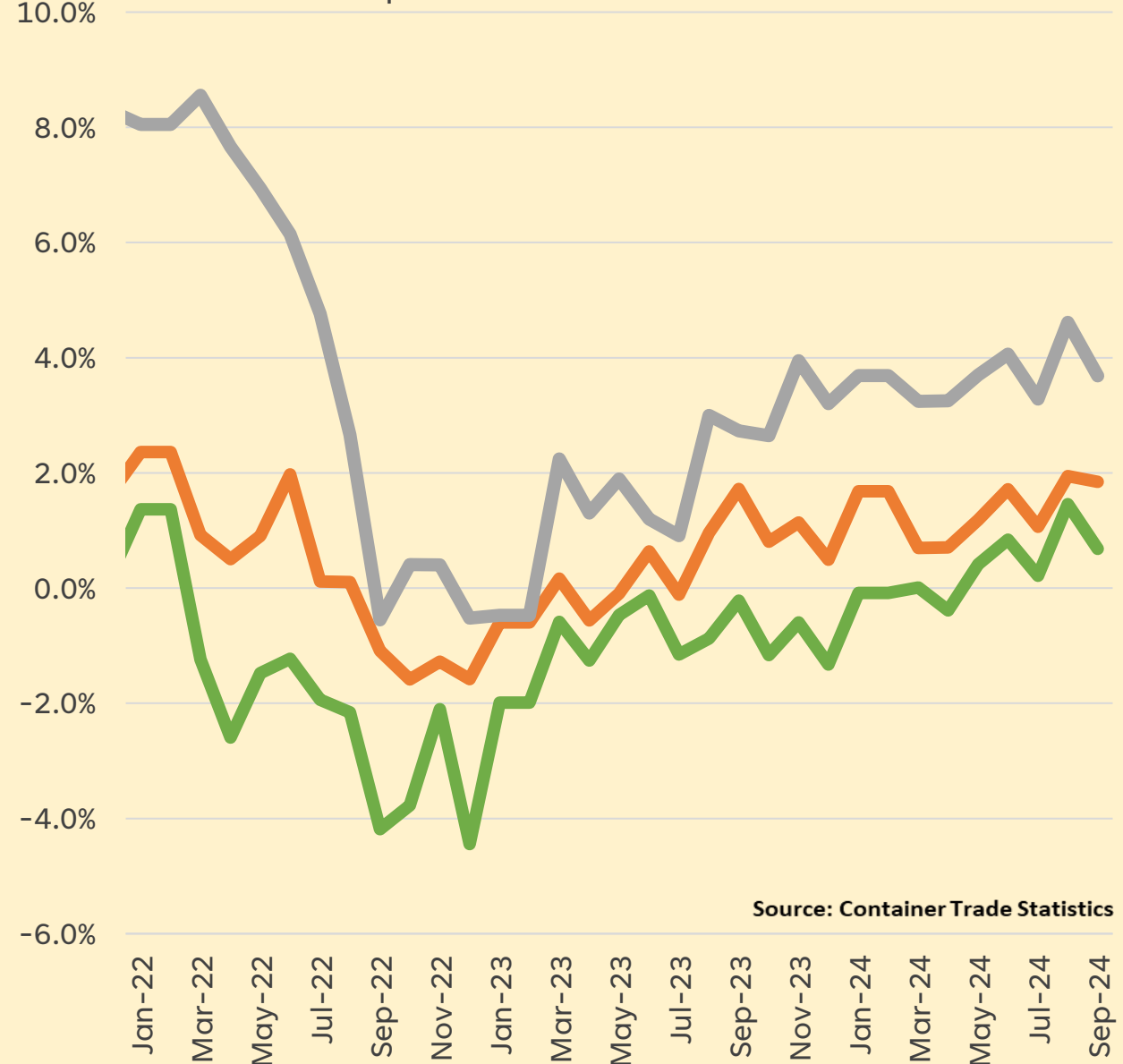
CONTAINER MARKET OUTLOOK

WE'RE STILL FEELING THE PANDEMIC SWINGS

Y/Y Container import volumes (CNY Adjusted)



Container import volumes annualised over 2019



Information Classification: General

Global North America

Europe

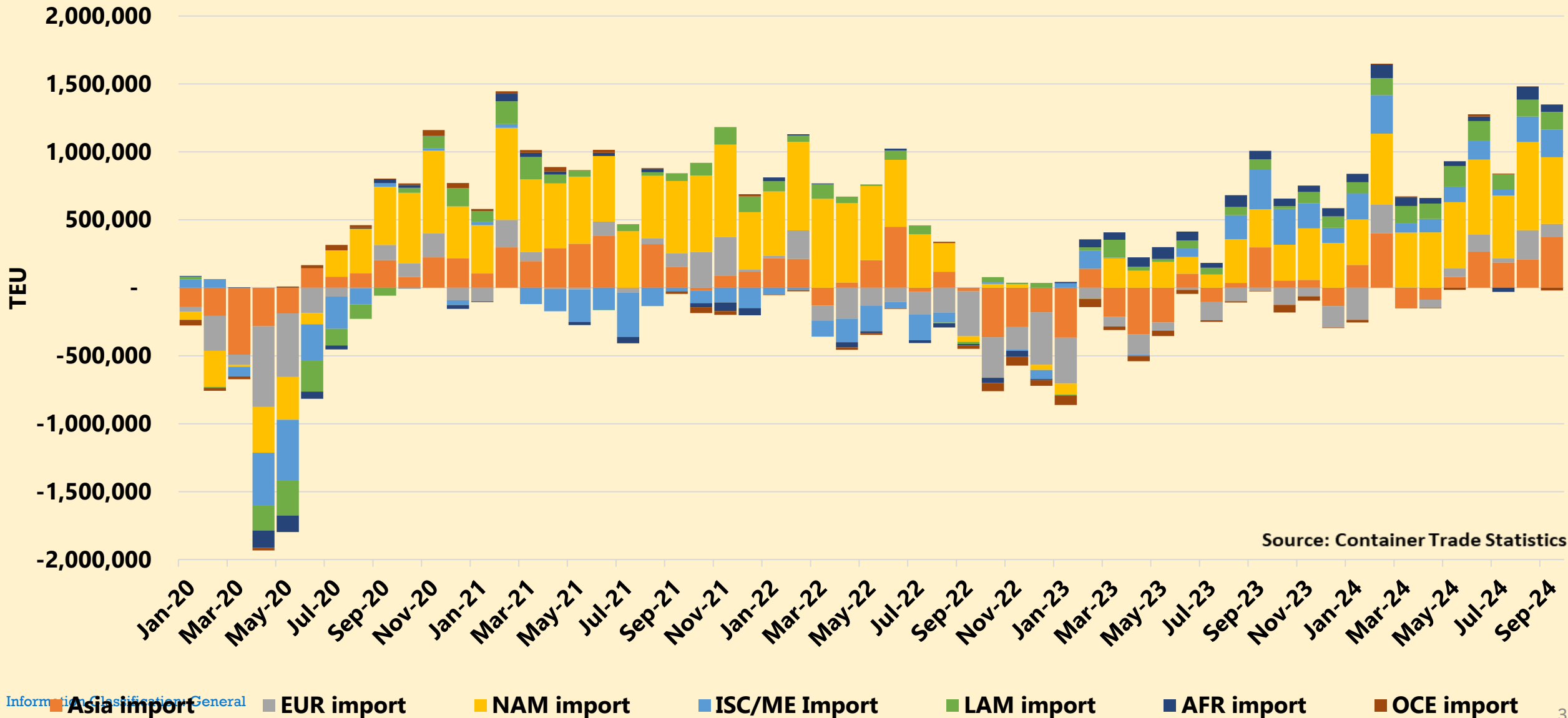
Global

North America

Europe

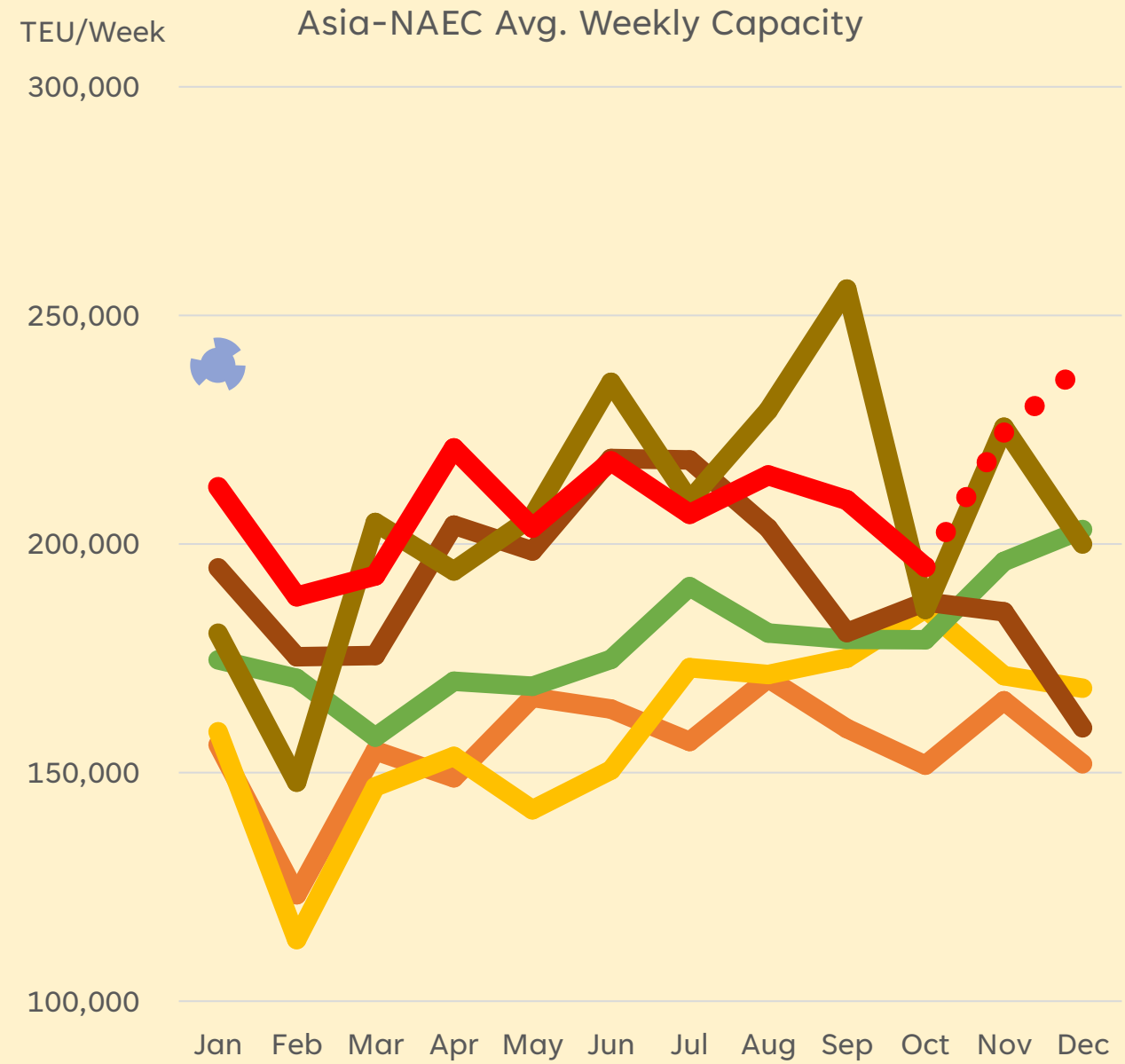
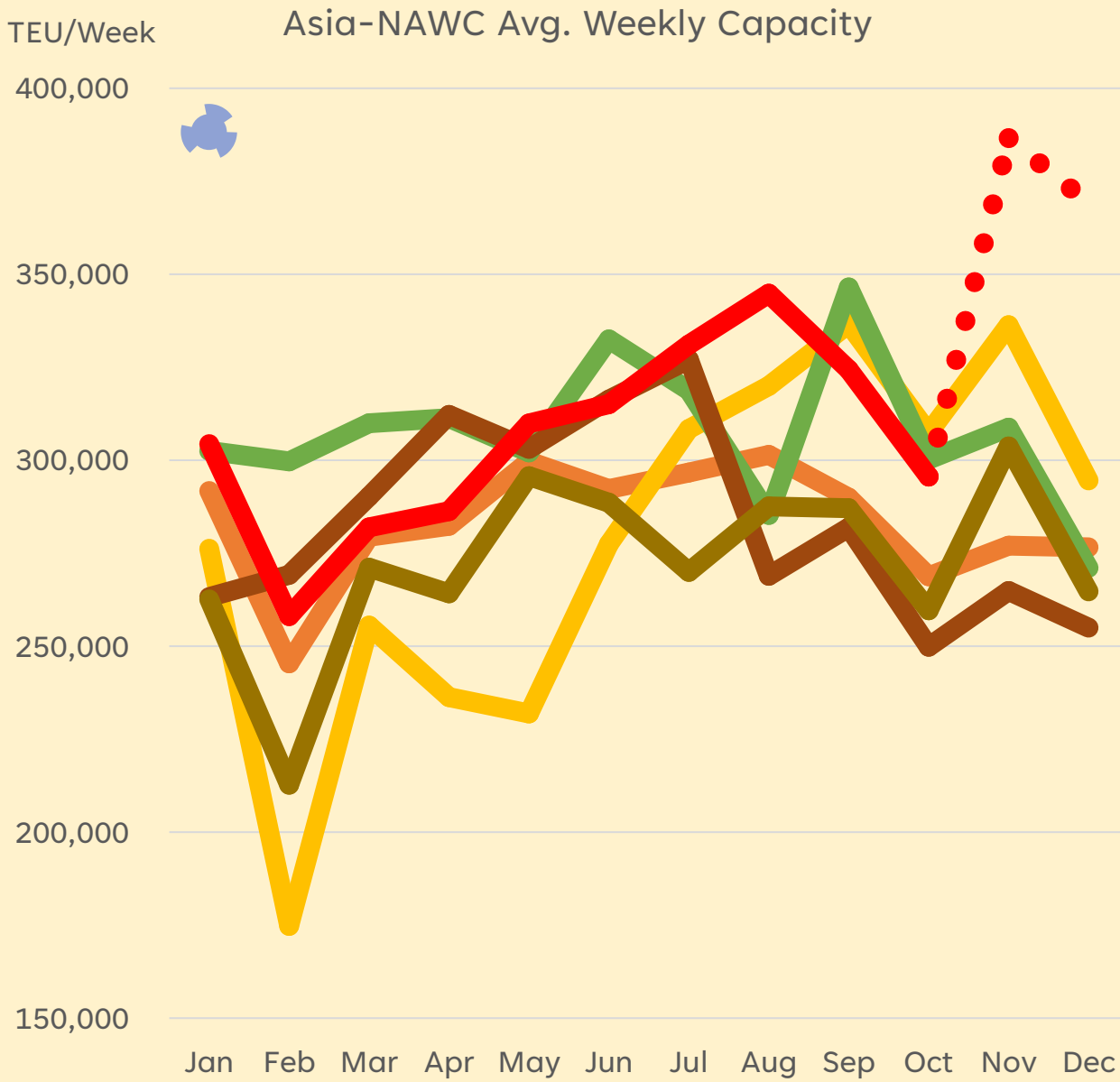
EVEN MORE SO WHEN LOOKING AT CONTRIBUTION SINCE 2019

Regional import contribution to Global TEU gain/loss over same month in 2019

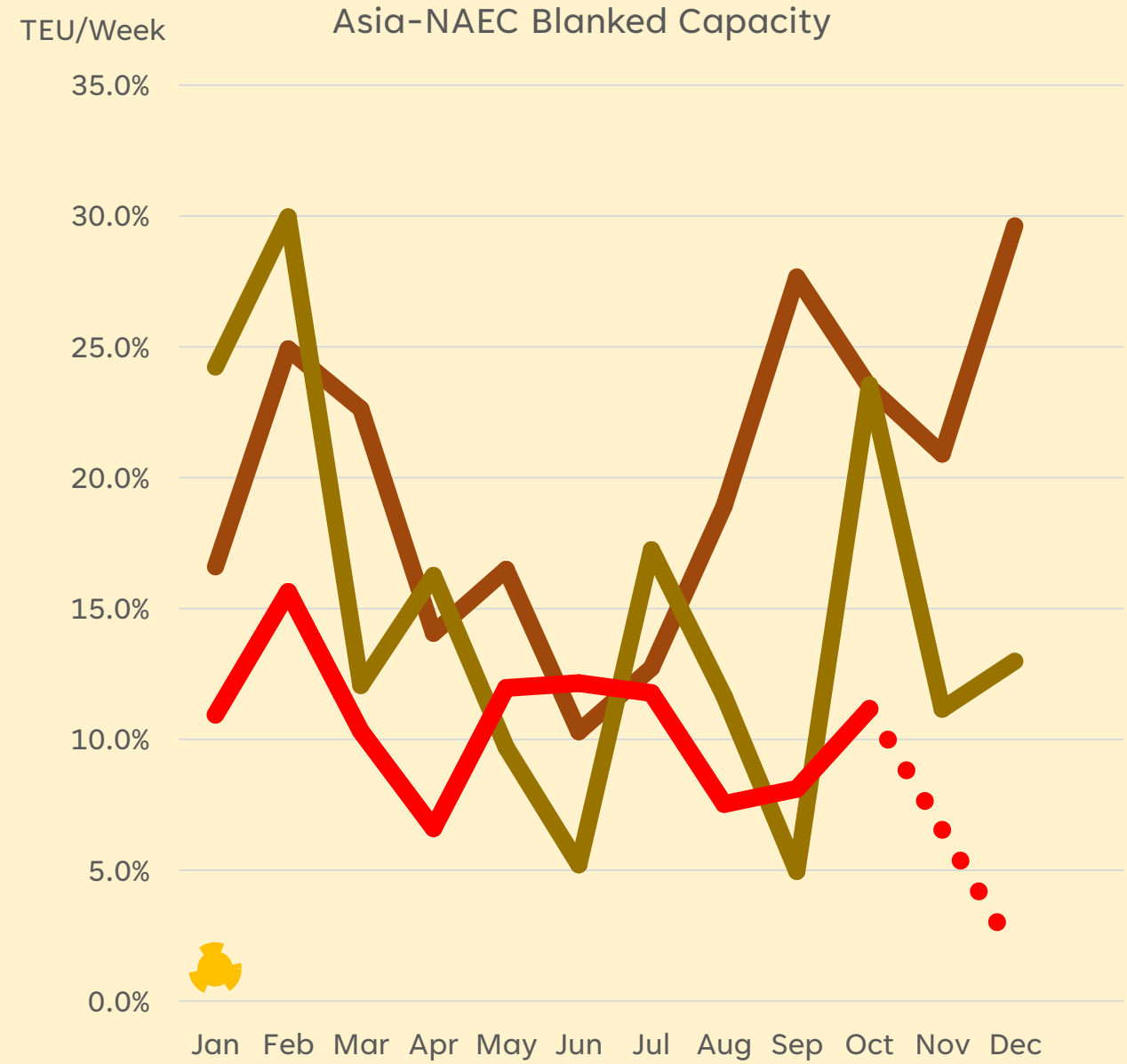
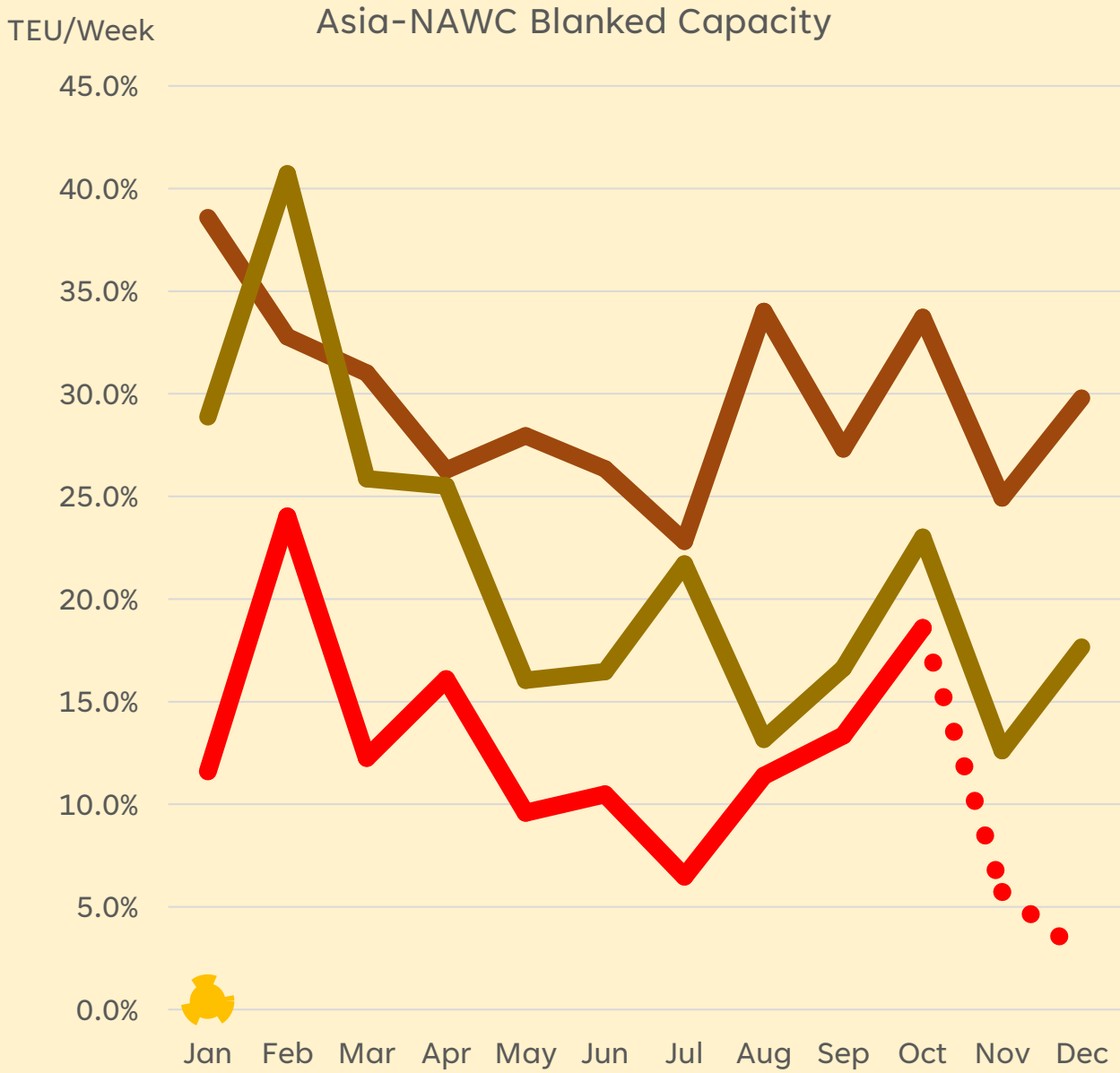


Source: Container Trade Statistics

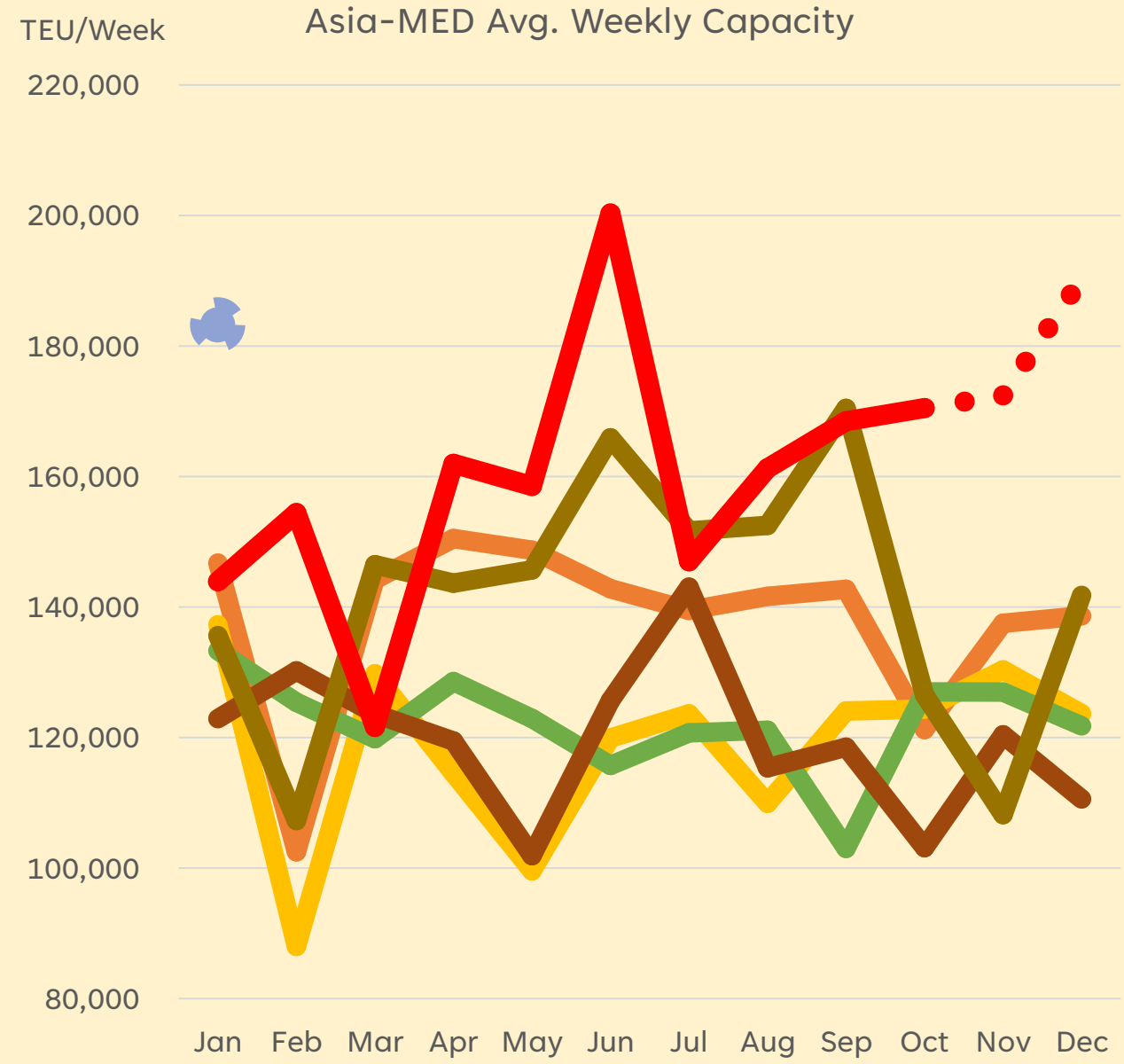
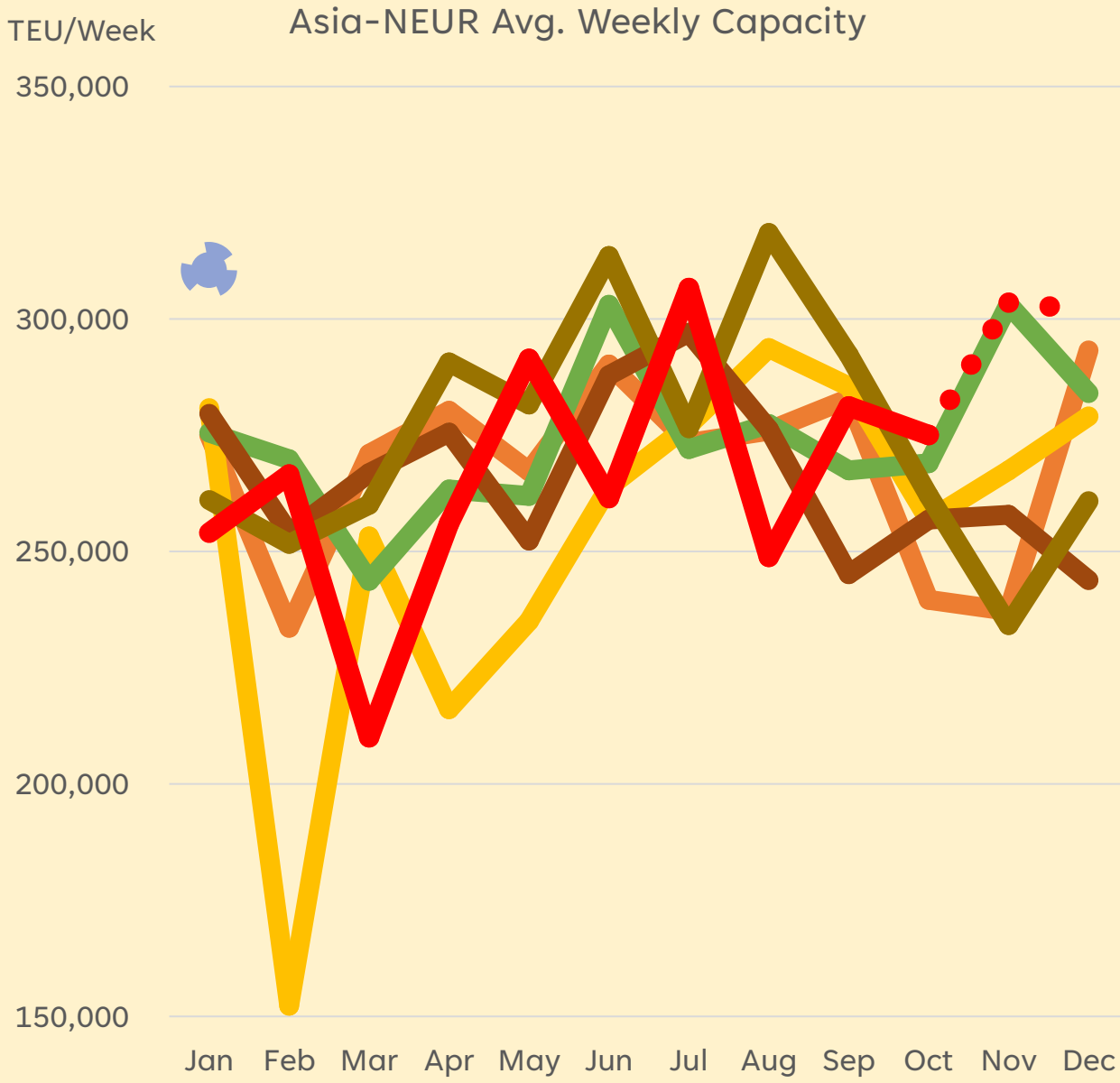
CARRIERS WERE "LATE" WITH TP SUPPLY, LOOMING OVERSUPPLY



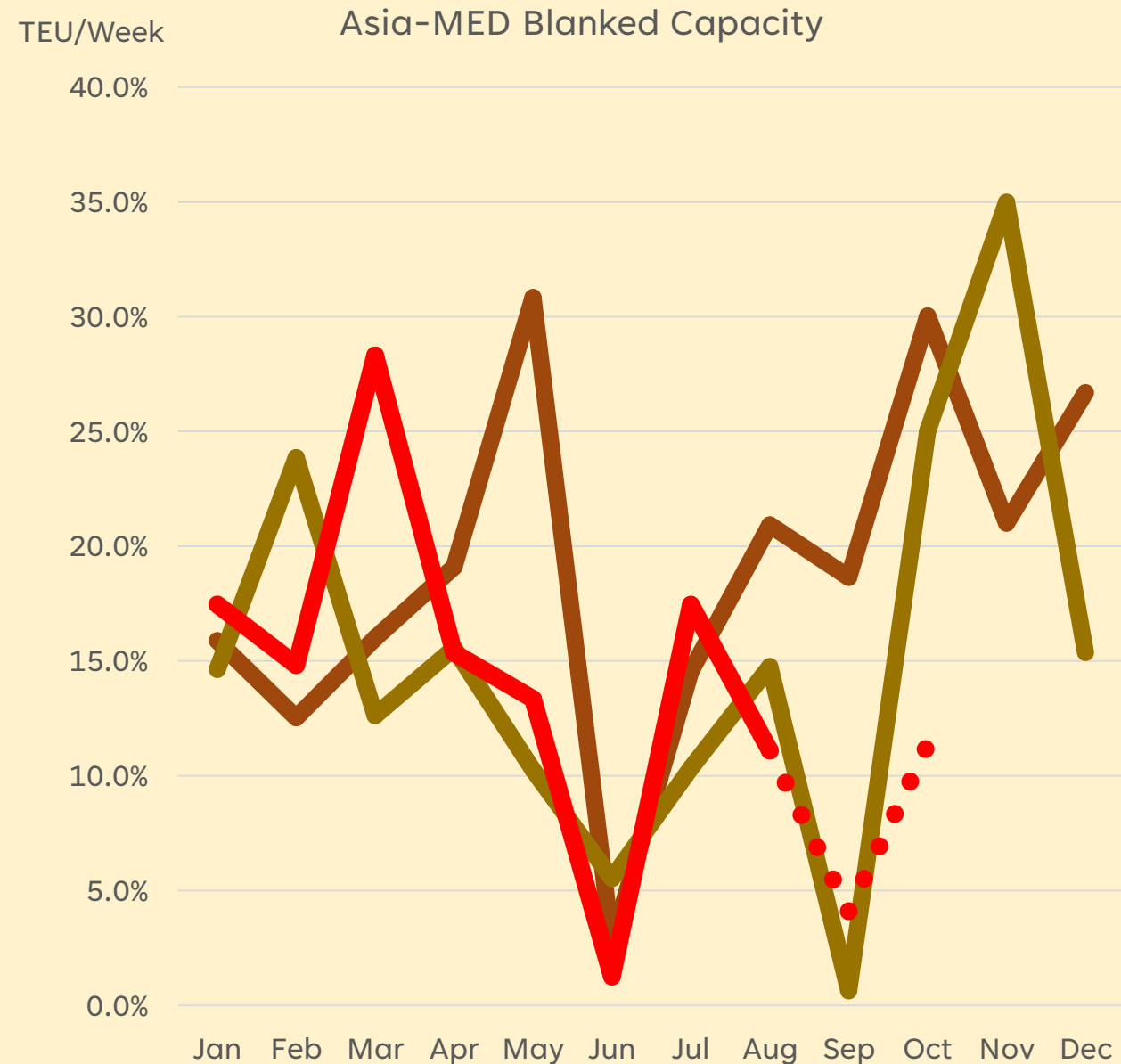
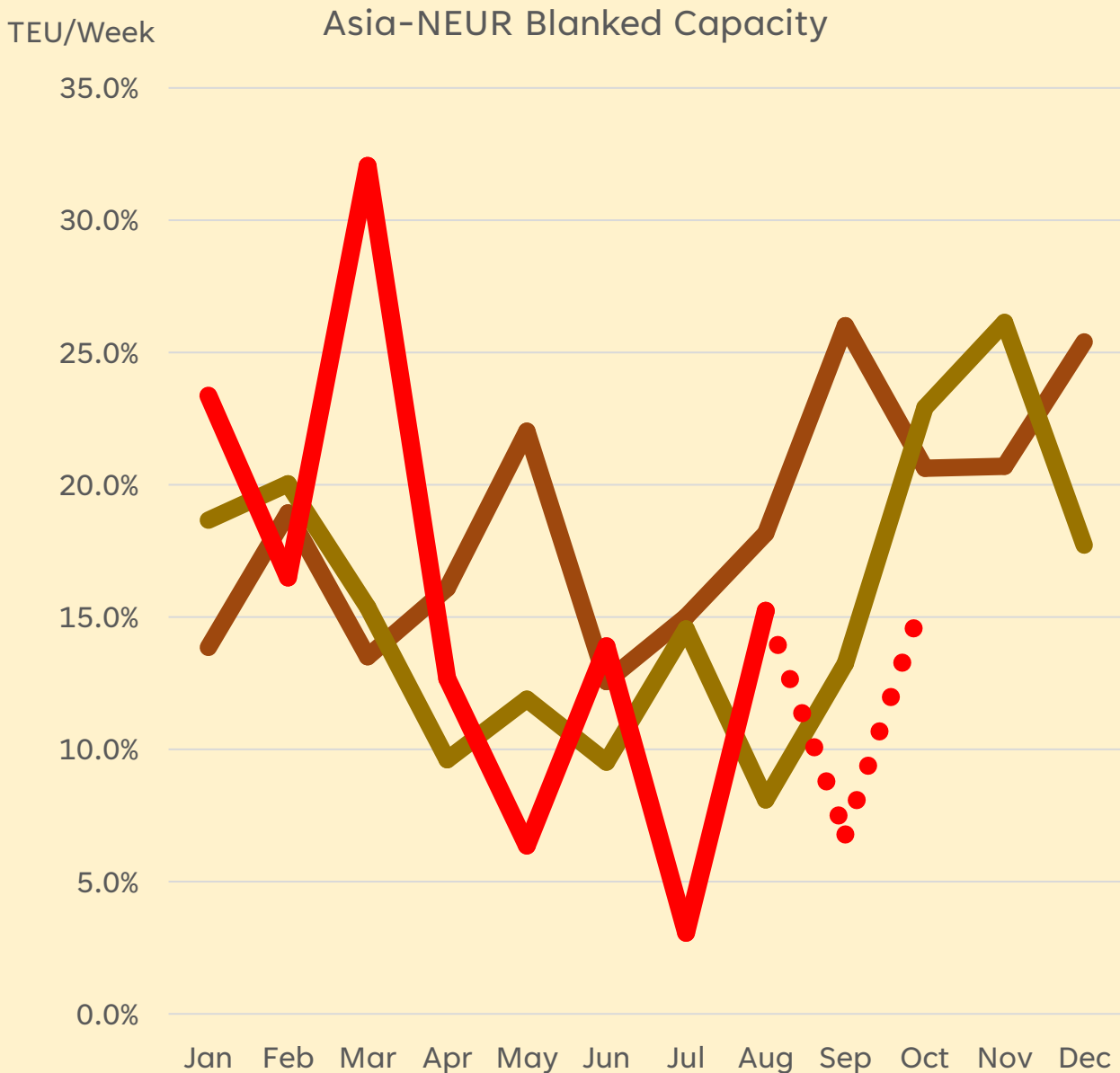
TRANSPACIFIC BLANK CAPACITY AS SHARE OF TOTAL SUPPLY



ASIA-NEUR MATCHING PAST, ASIA-MED TRENDING OVERSUPPLY



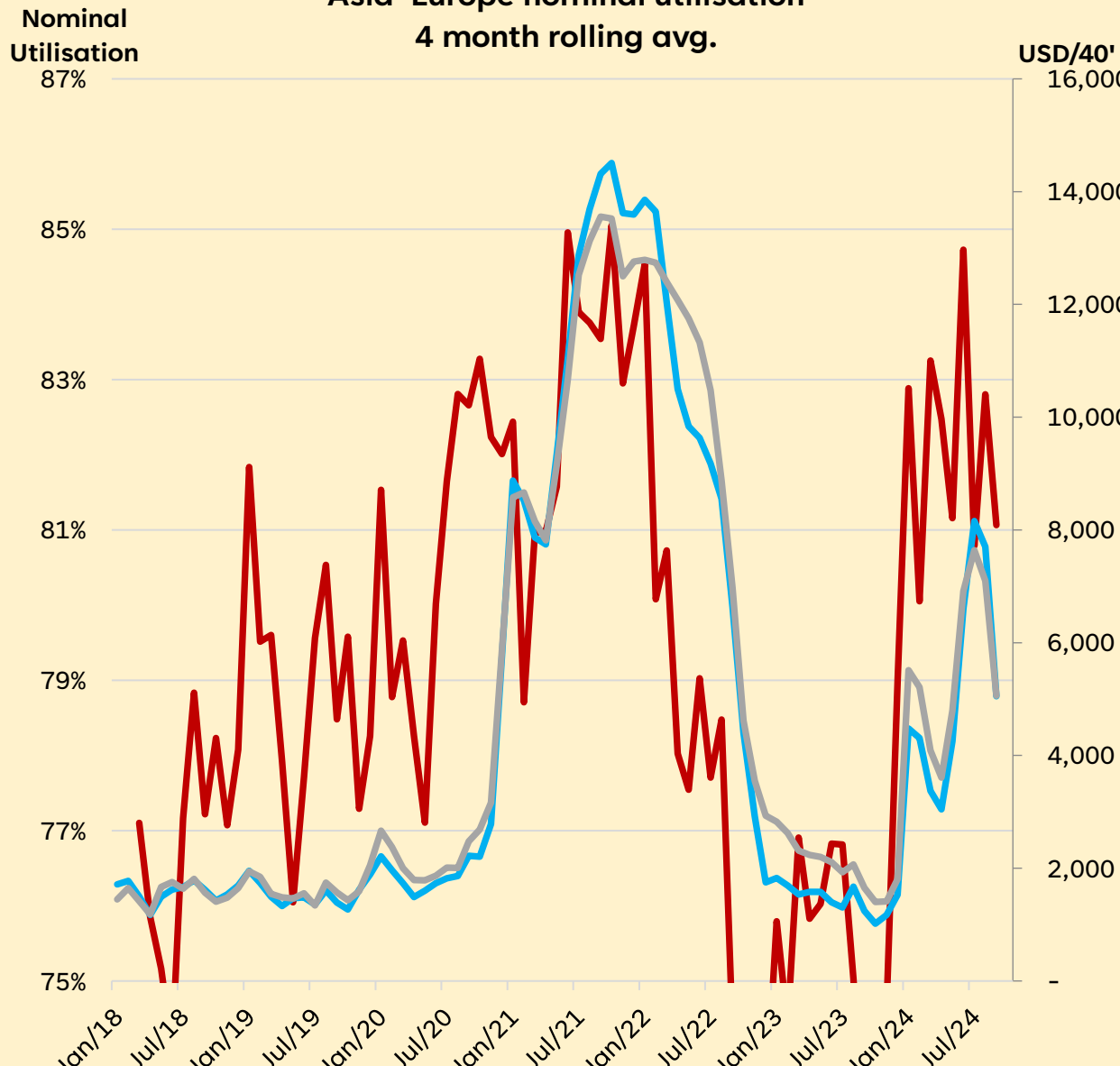
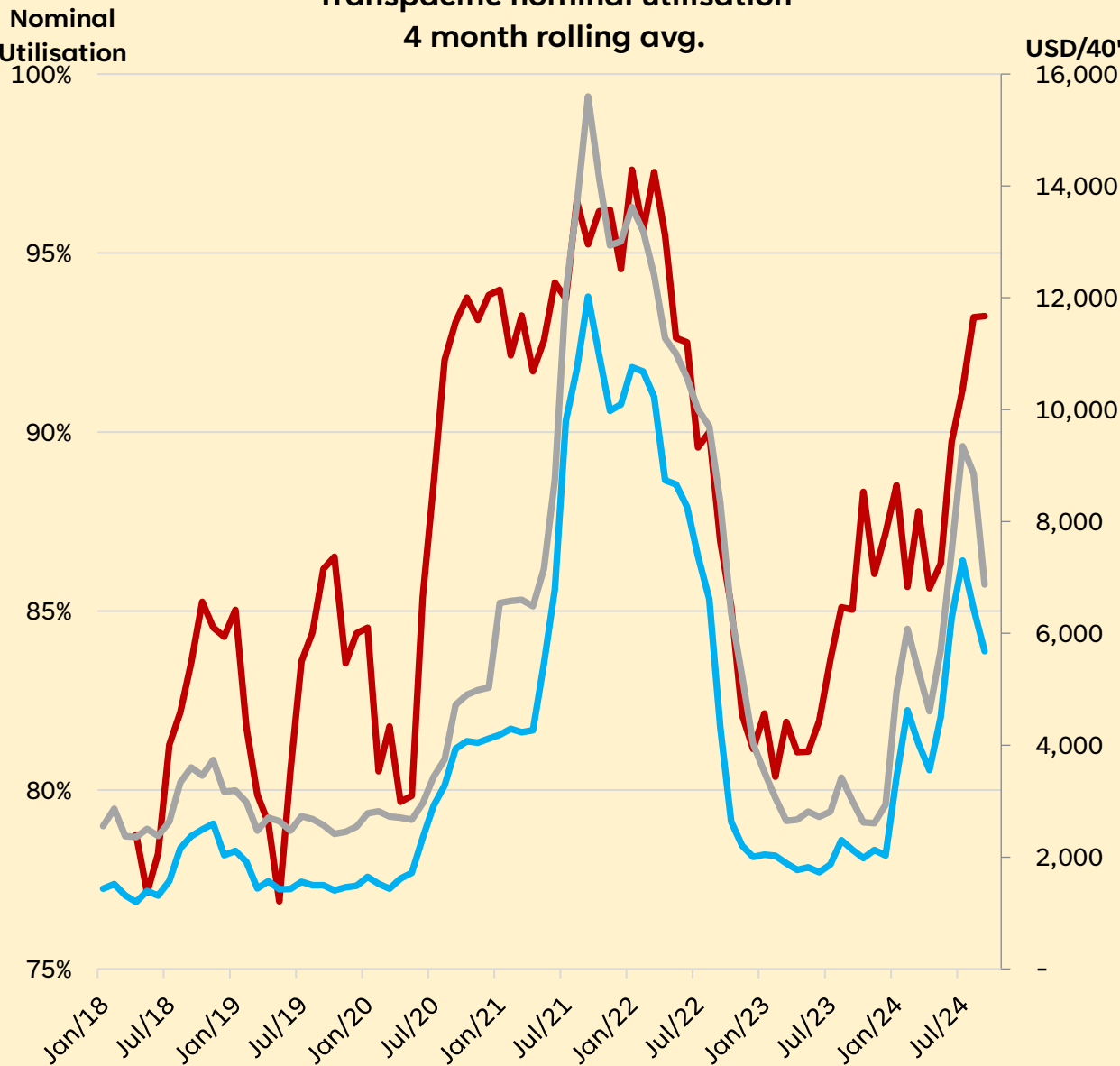
ASIA-EUROPE BLANK CAPACITY AS SHARE OF TOTAL SUPPLY



SUPPLY/DEMAND BALANCE DRIVING SPOT PRICES

**Transpacific nominal utilisation
4 month rolling avg.**

**Asia-Europe nominal utilisation
4 month rolling avg.**

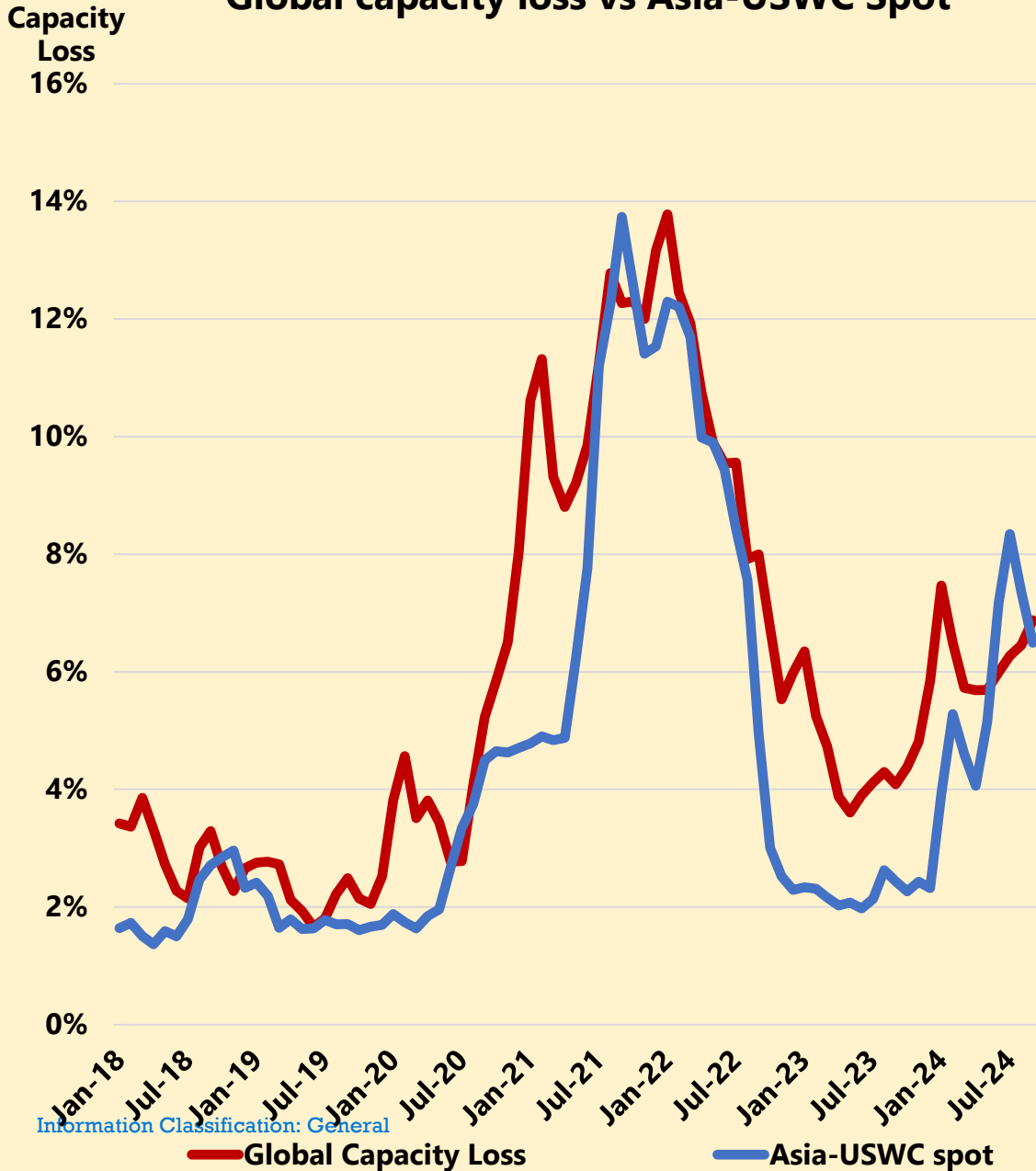


Information Classification: General
— TP Utilisation — Asia-USWC Spot — Asia-USEC Spot

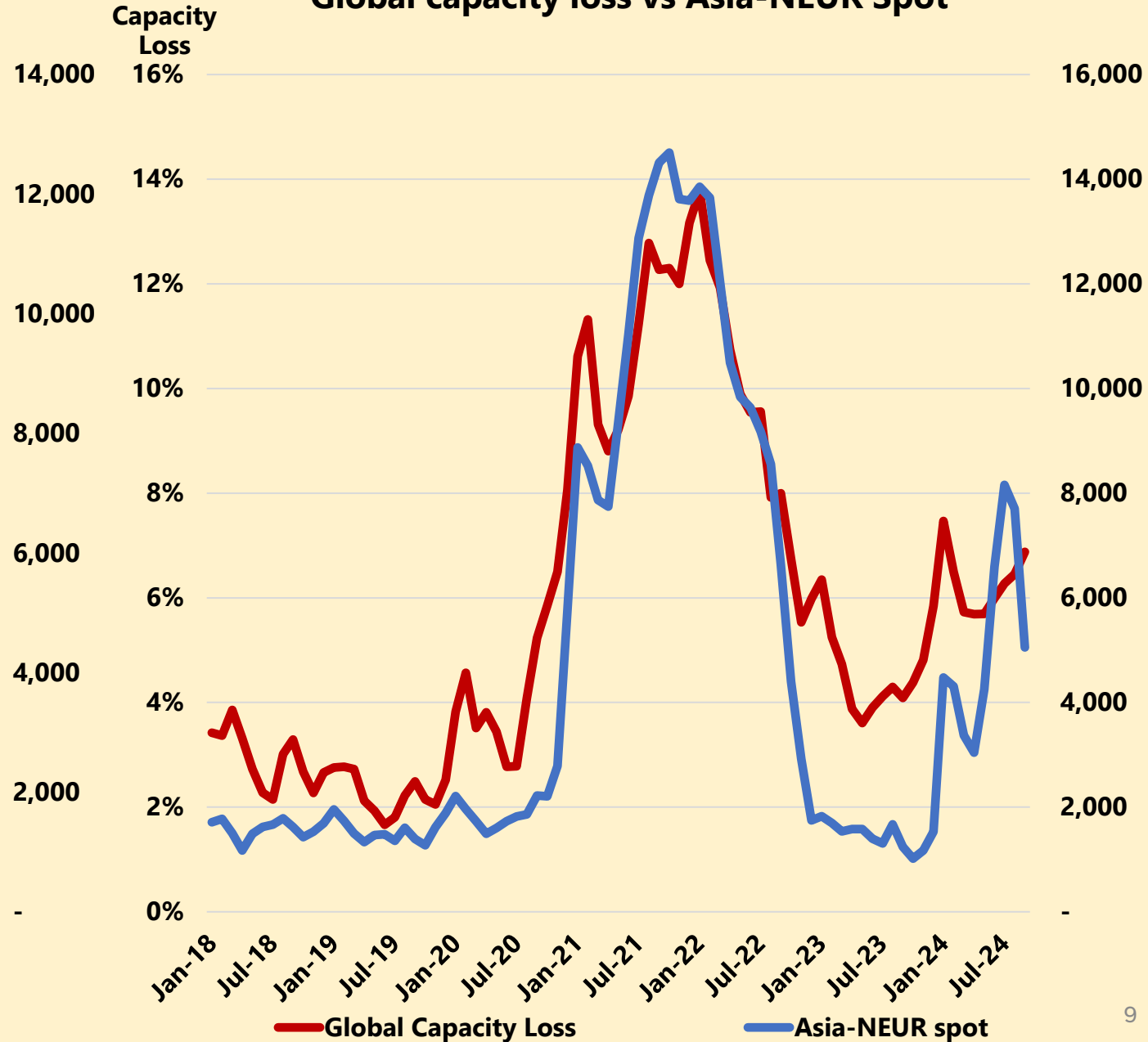
— AE Utilisation — Asia-NEUR Spot — Asia-MED Spot

BUT SUPPLY LOSS CLEARLY IS A STRONGER DRIVER

Global capacity loss vs Asia-USWC Spot

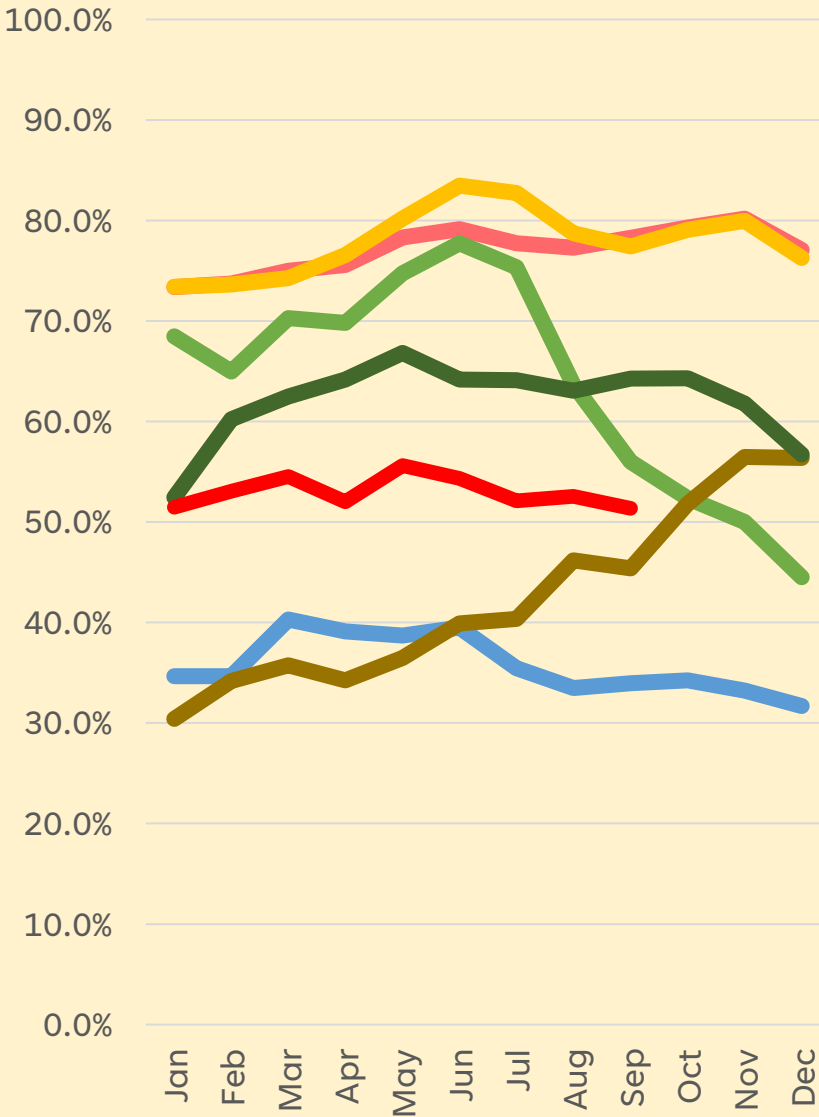


Global capacity loss vs Asia-NEUR Spot

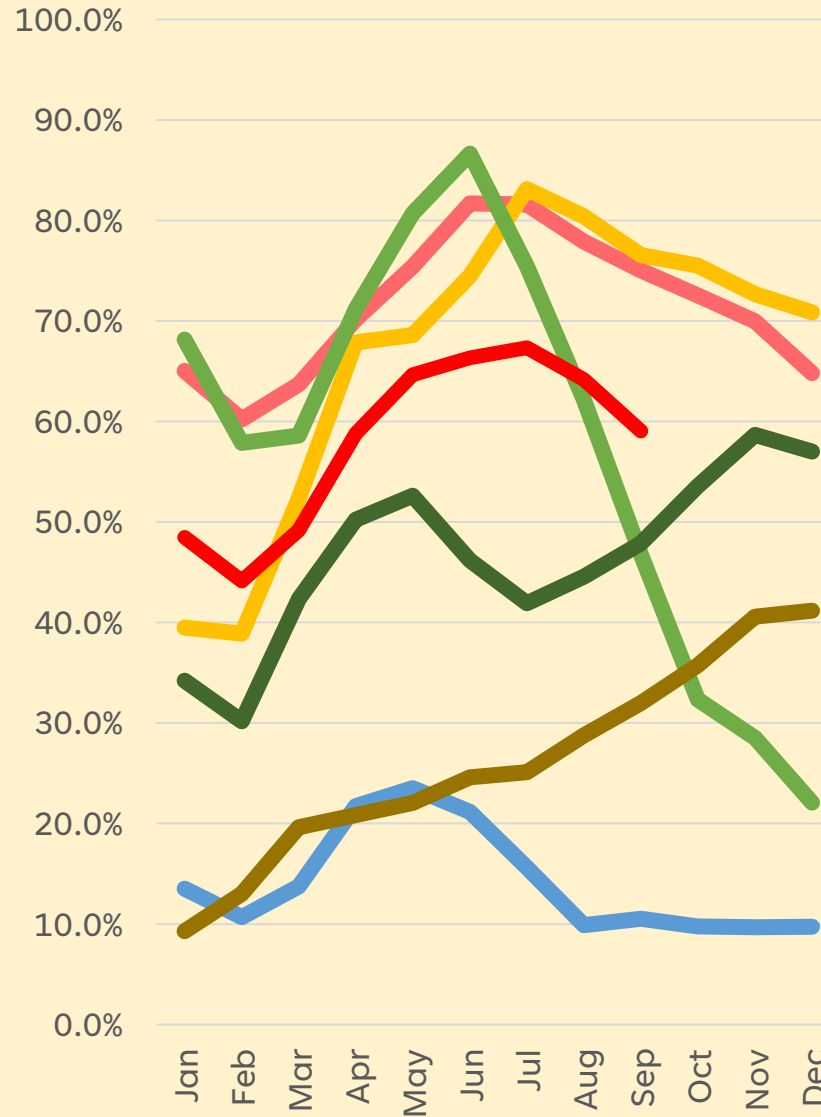


2024 GLOBAL RELIABILITY AND DELAYS REMAIN POOR

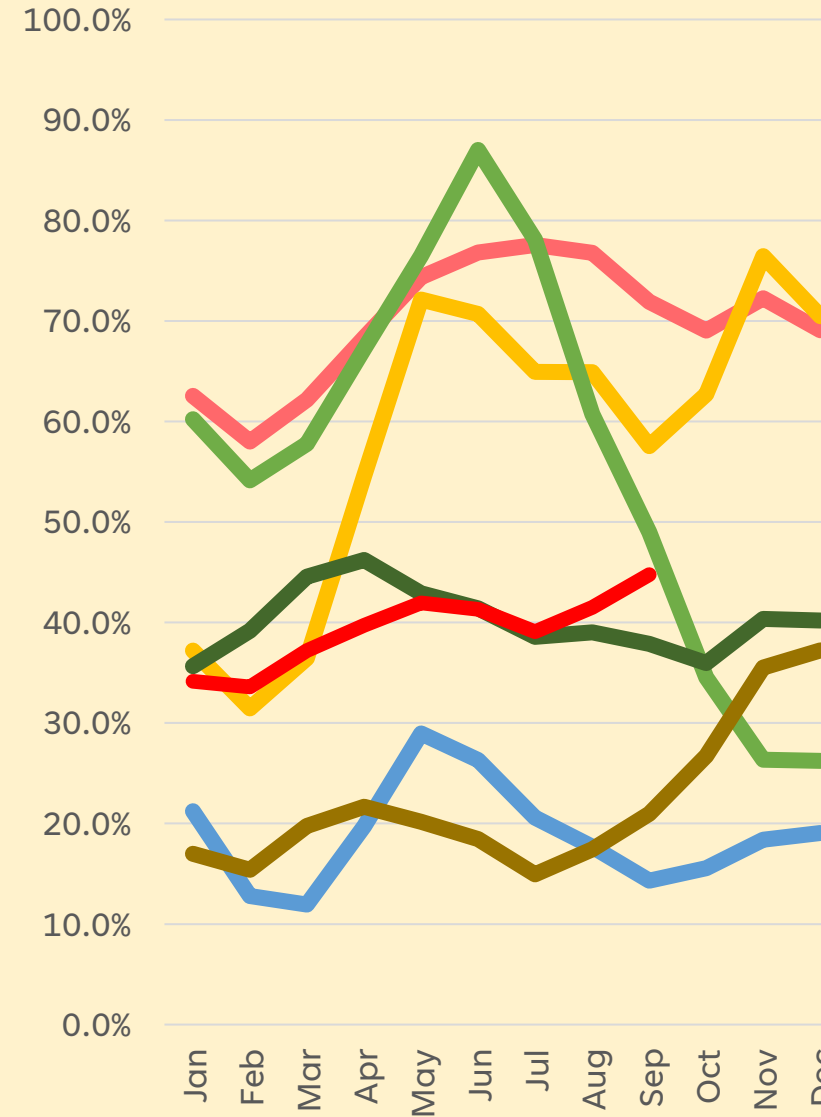
Global Schedule Reliability



Asia-NAWC Schedule Reliability



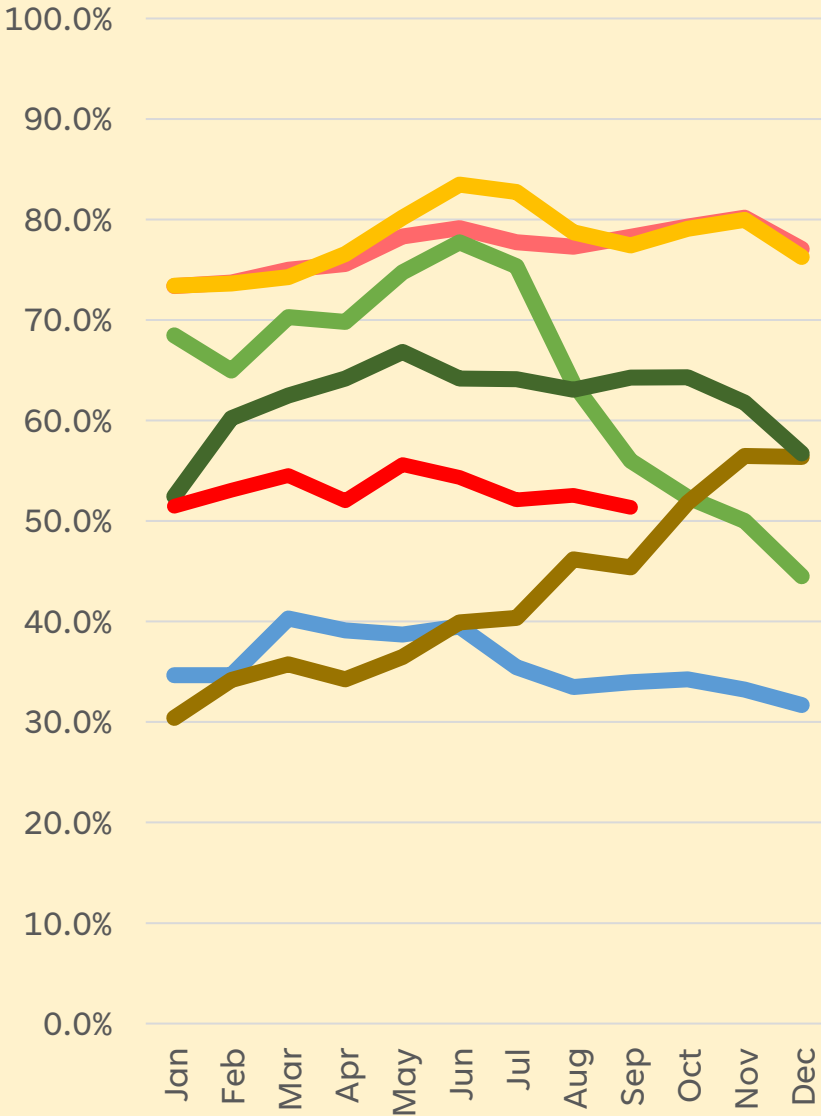
Asia-NAEC Schedule Reliability



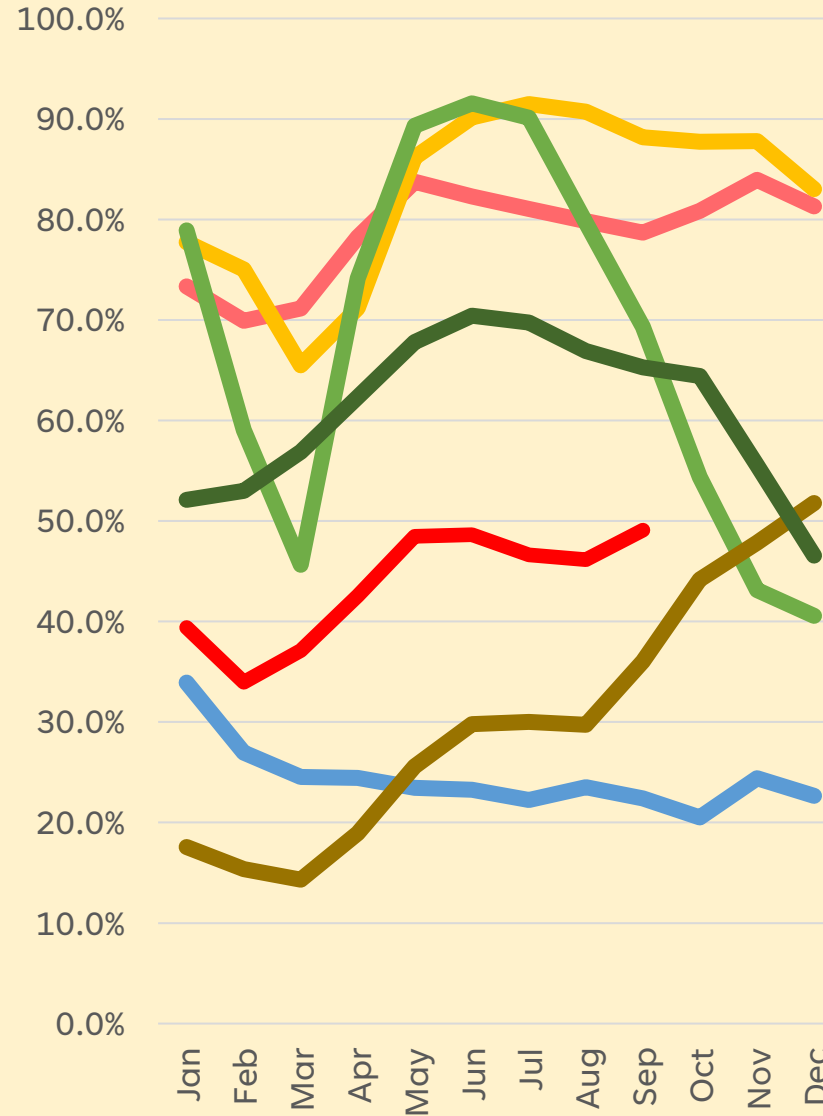
Information Classification: General

BOTH ASIA-EUROPE TRADE UNDERPERFORM GLOBAL

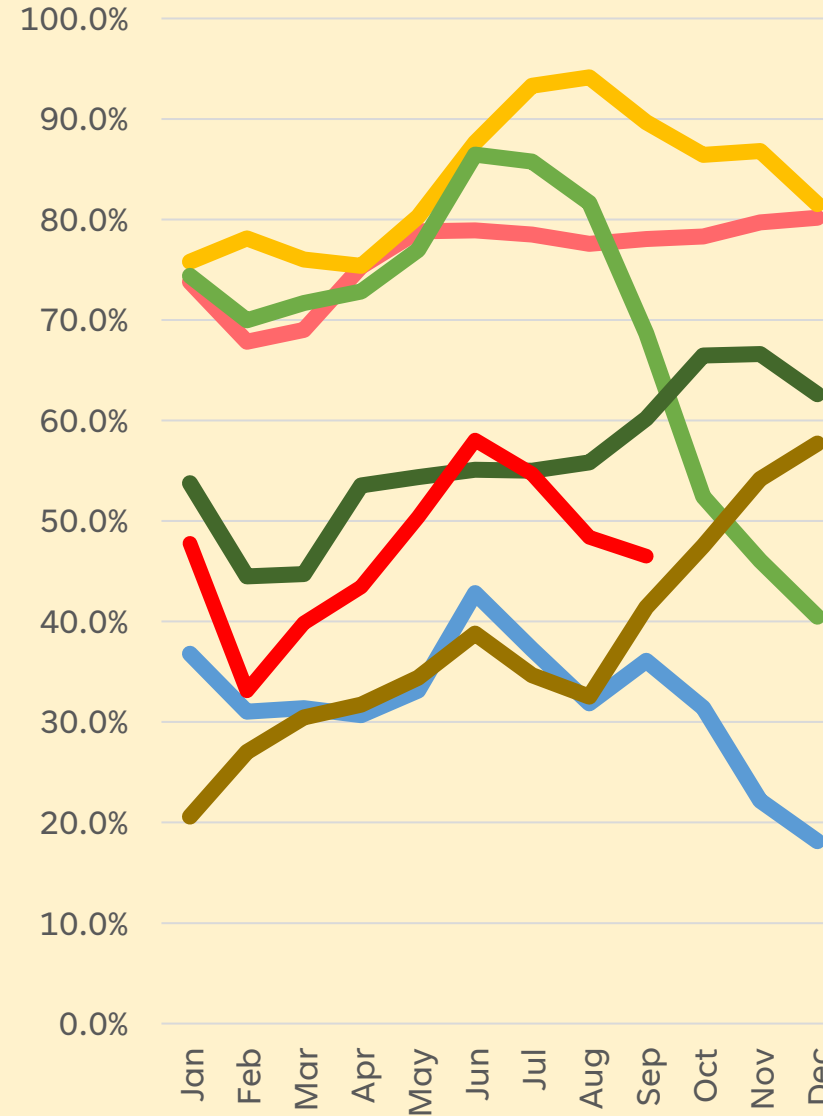
Global Schedule Reliability



Asia-NEUR Schedule Reliability



Asia-MED Schedule Reliability

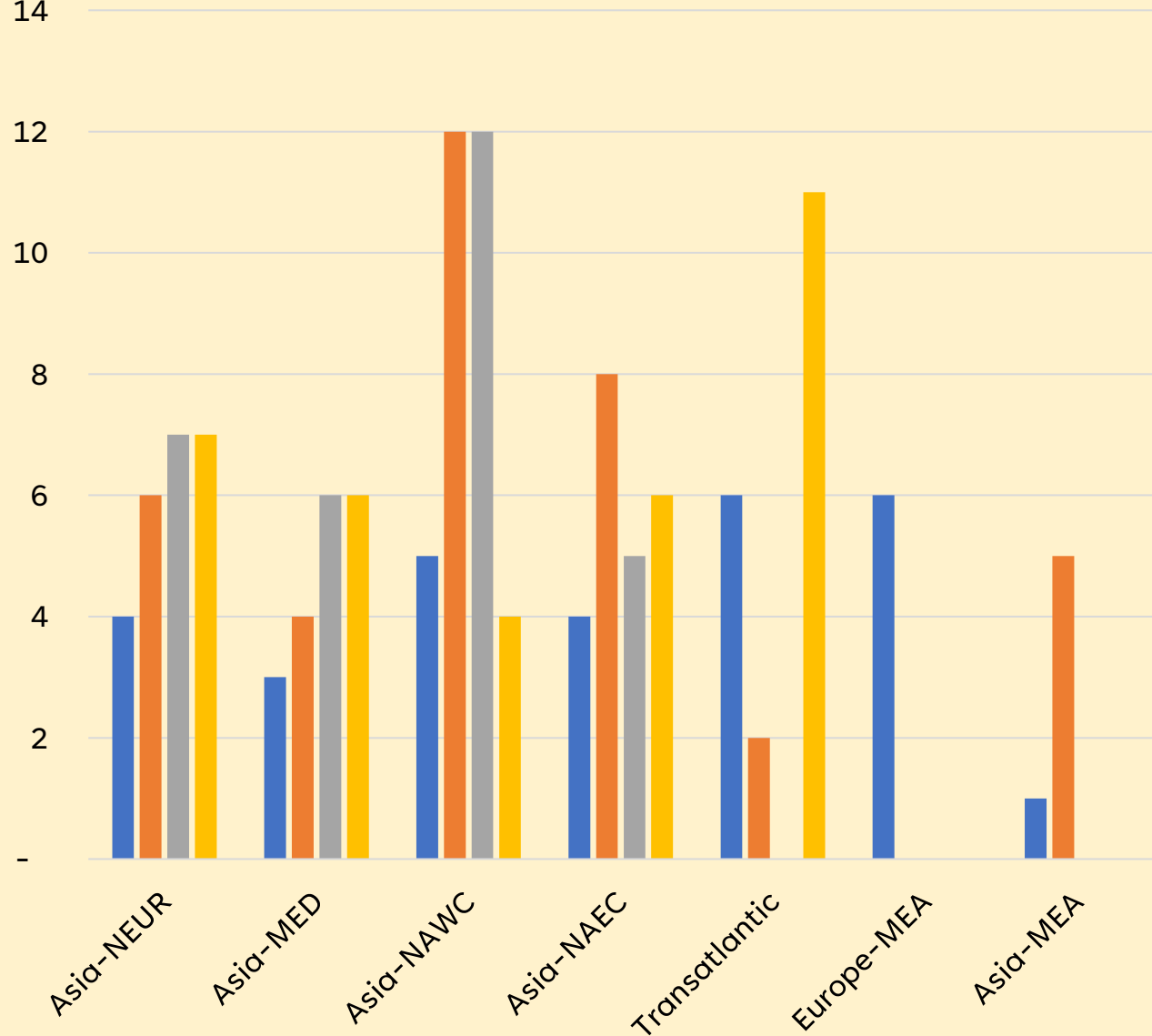


2025 ALLIANCE NETWORKS

WEEKLY SERVICES ON THE NEW 2025 ALLIANCE NETWORKS

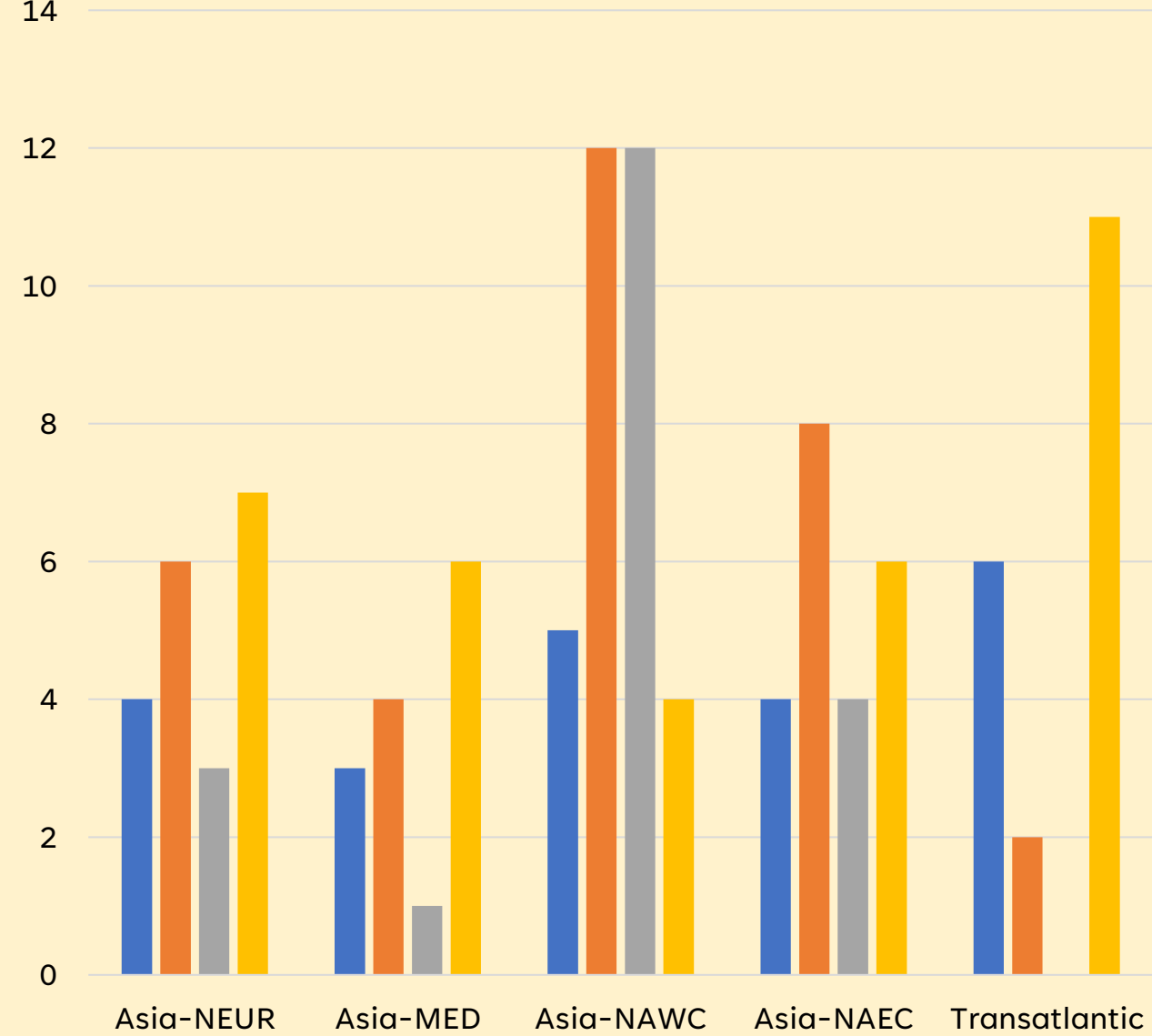
Weekly services
14

Weekly Alliance services marketed



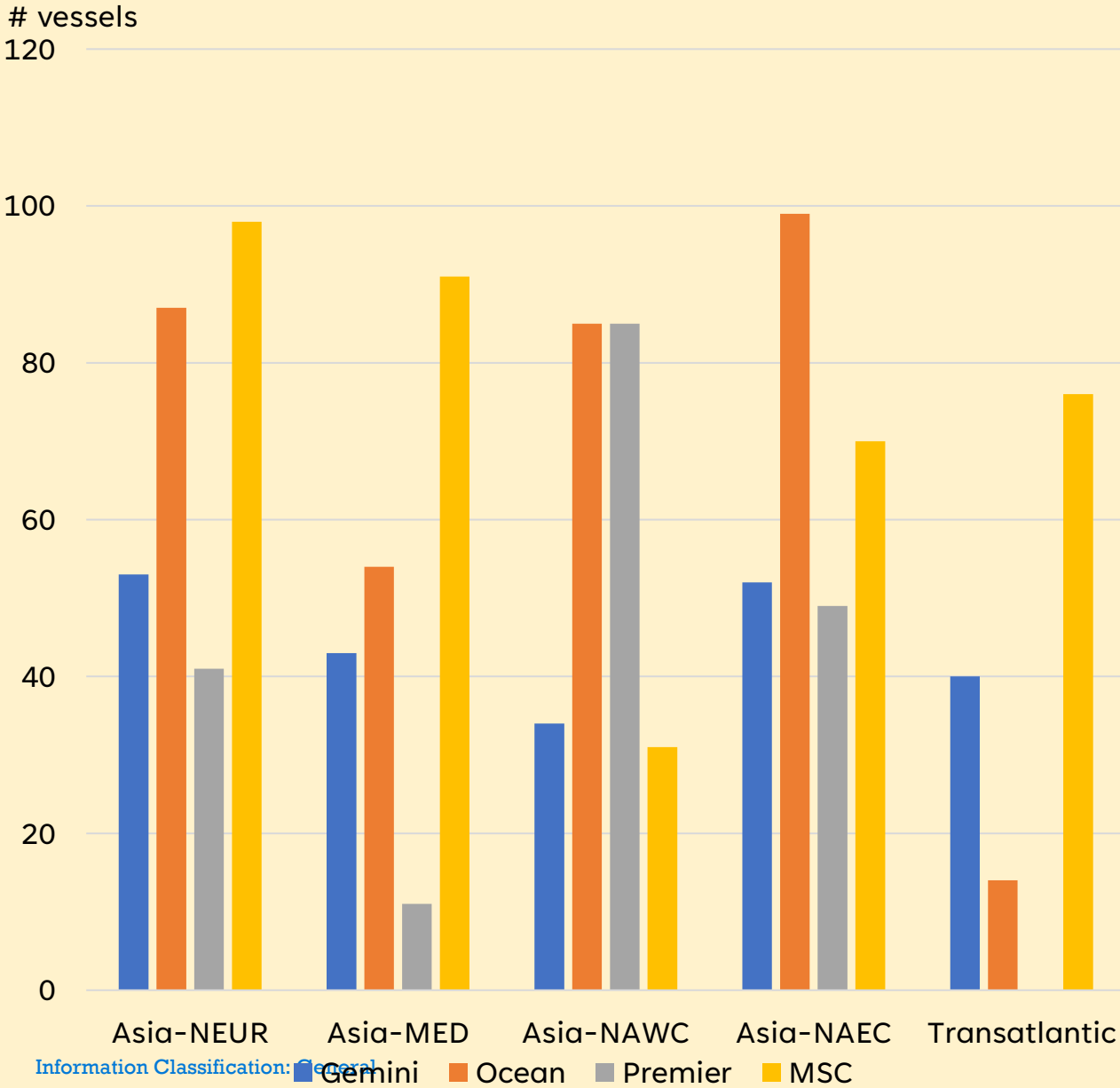
weekly services
14

Weekly Alliance services actually operated

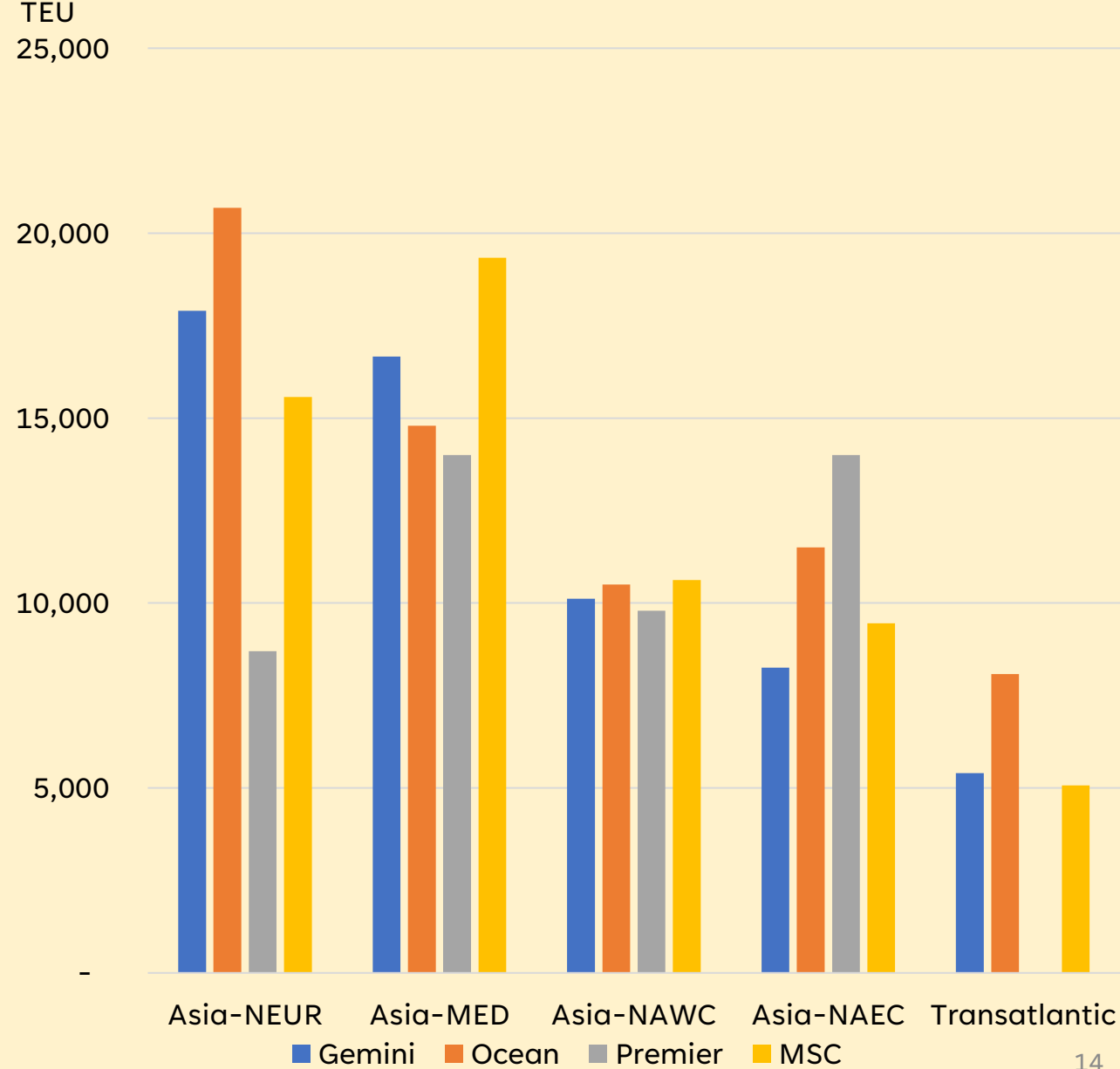


NO. OF VESSELS AND AVERAGE VESSELS SIZE

Vessels committed to East/West trades

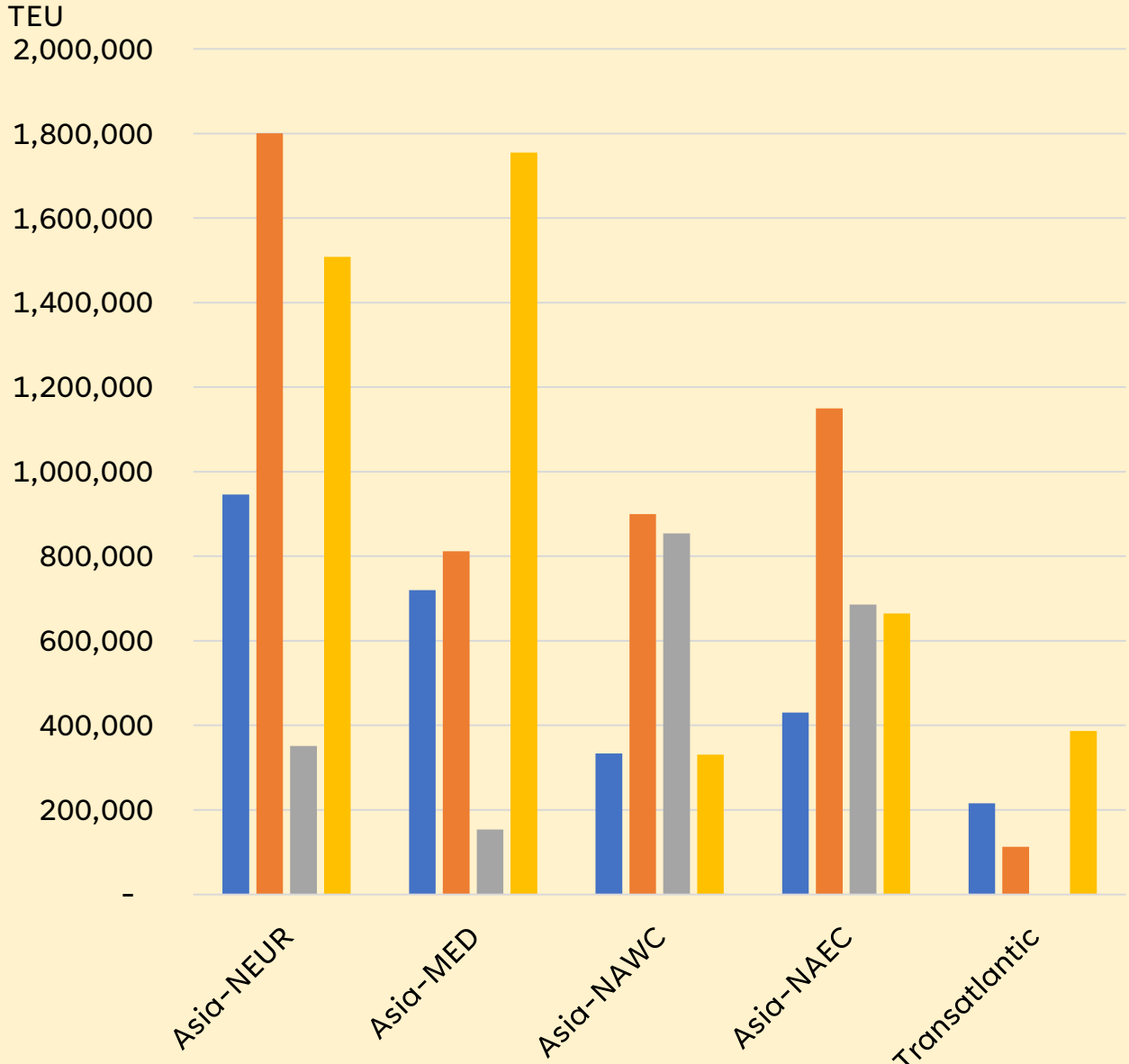


Avg. Vessel size per East/West trade - TEU

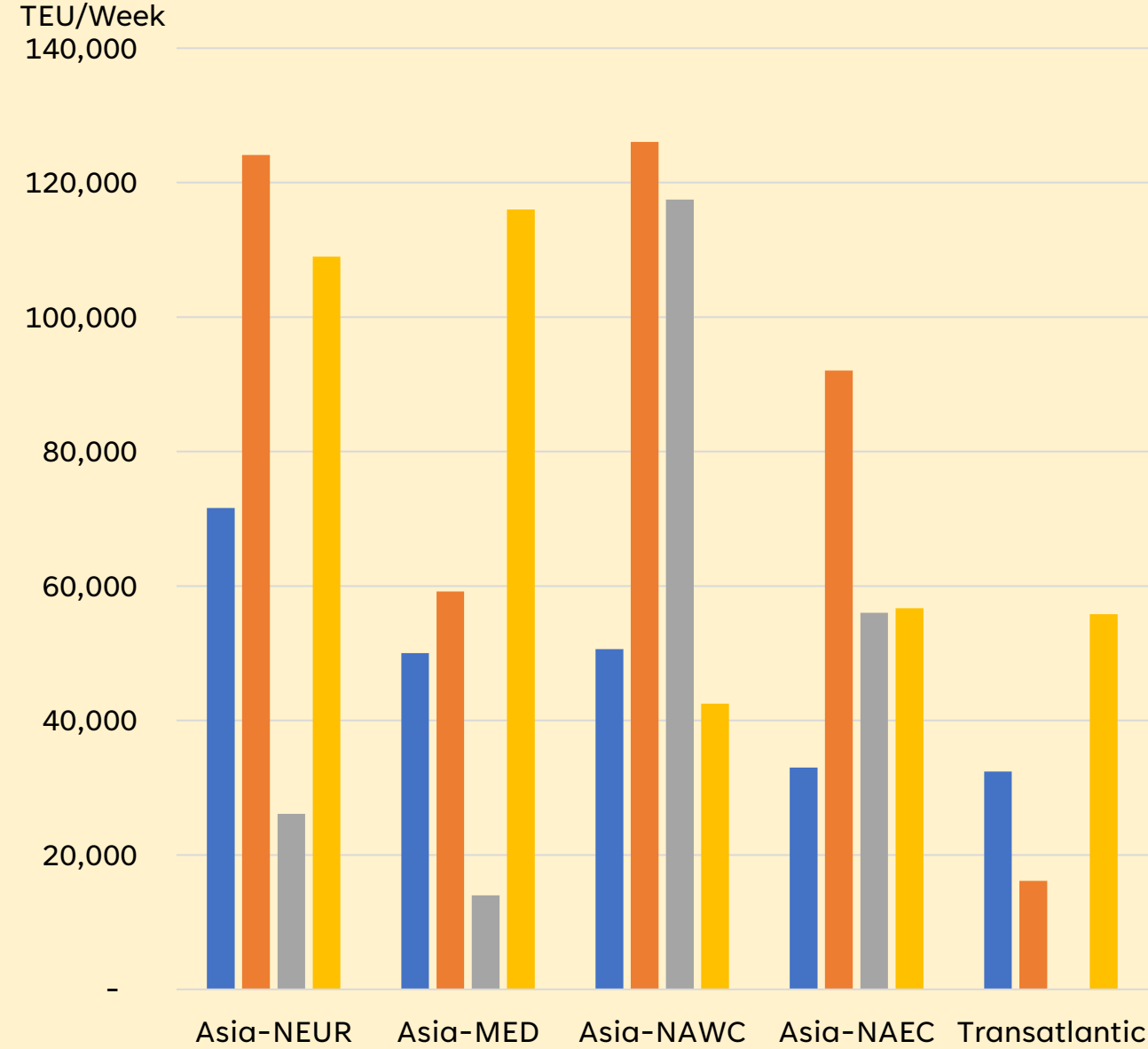


"INVESTED CAPACITY" AND DEPLOYED CAPACITY

Total Committed vessel capacity per trade

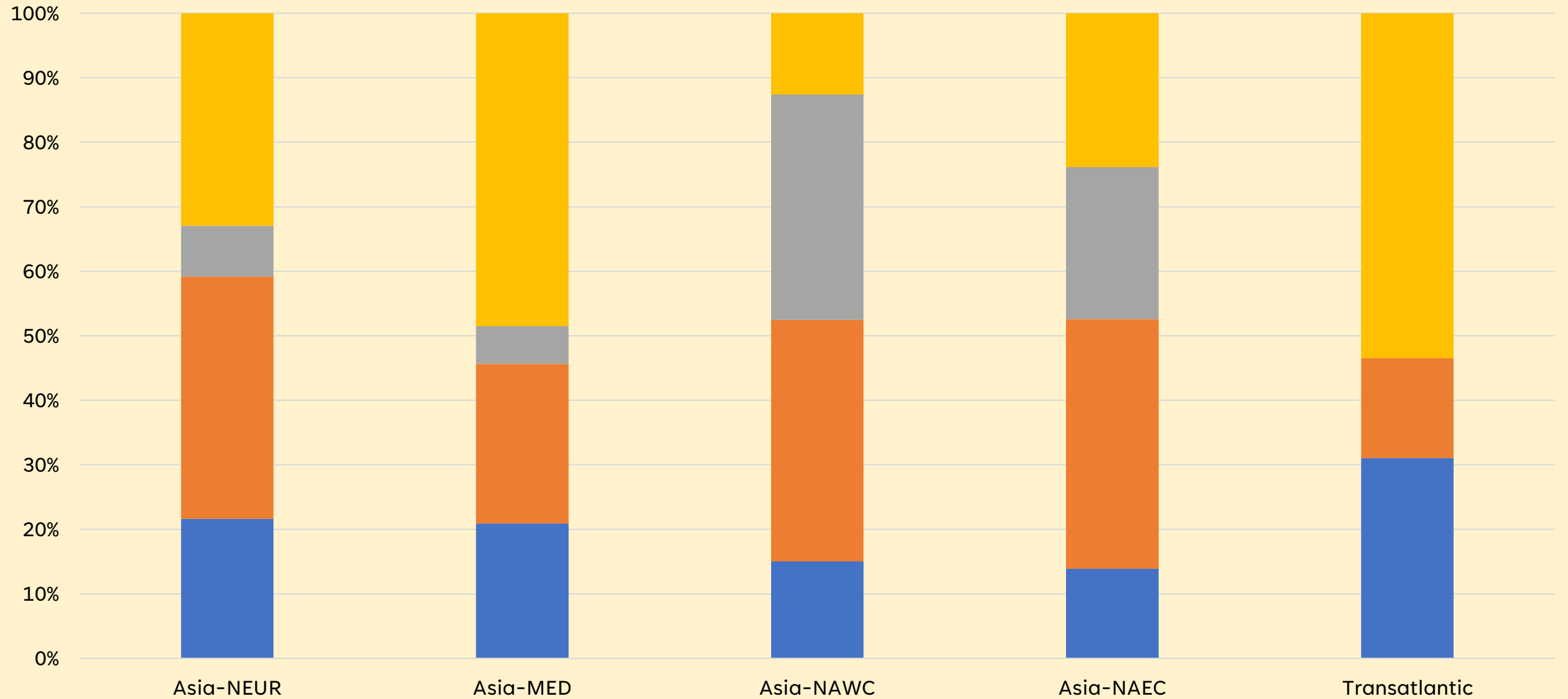


Weekly Deployed Capacity per trade



2025 ALLIANCE CAPACITY MARKET SHARES

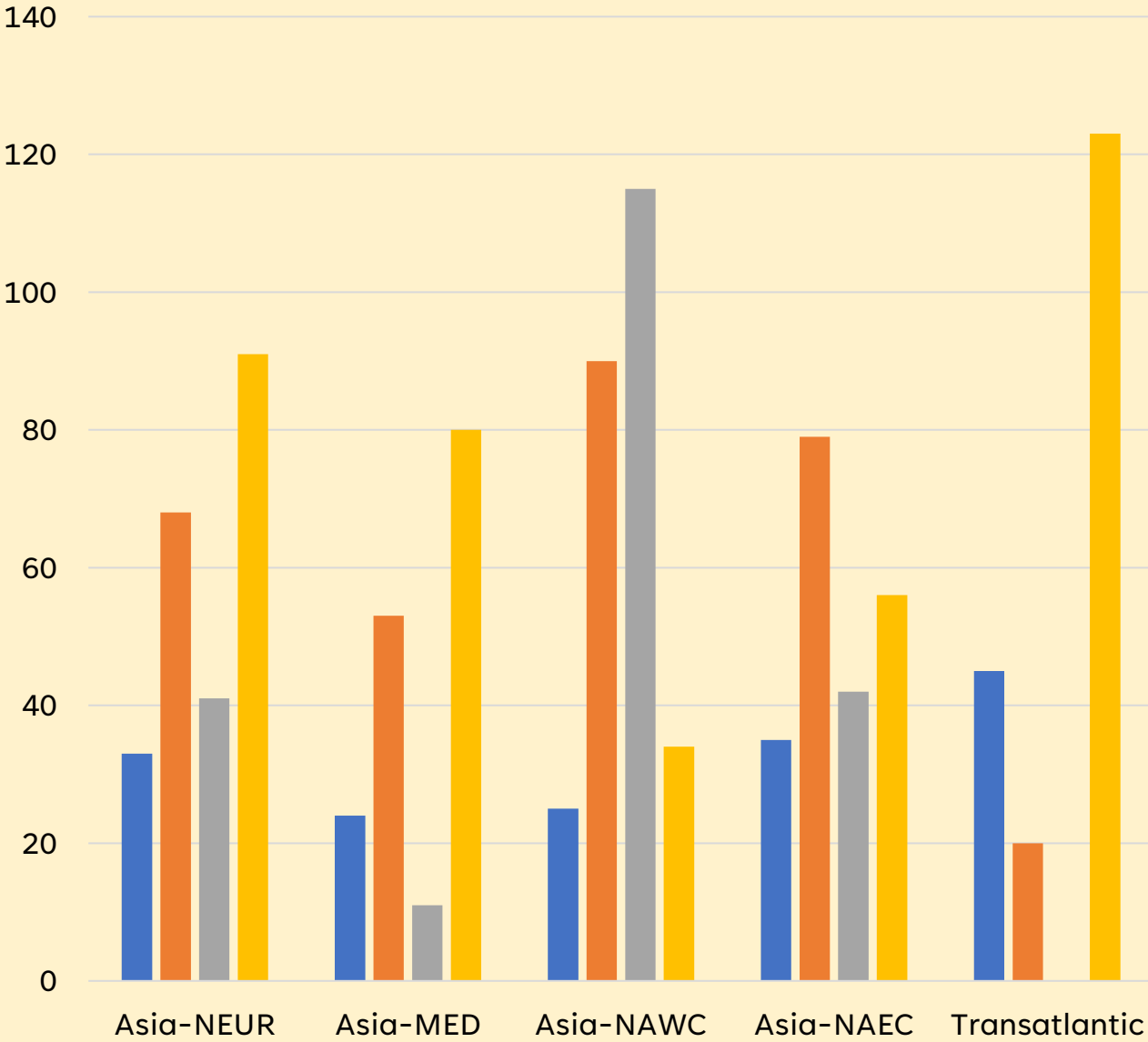
Capacity market share per trade



WEEKLY PORT CALLS AND AVG. PORT CALLS/SERVICE

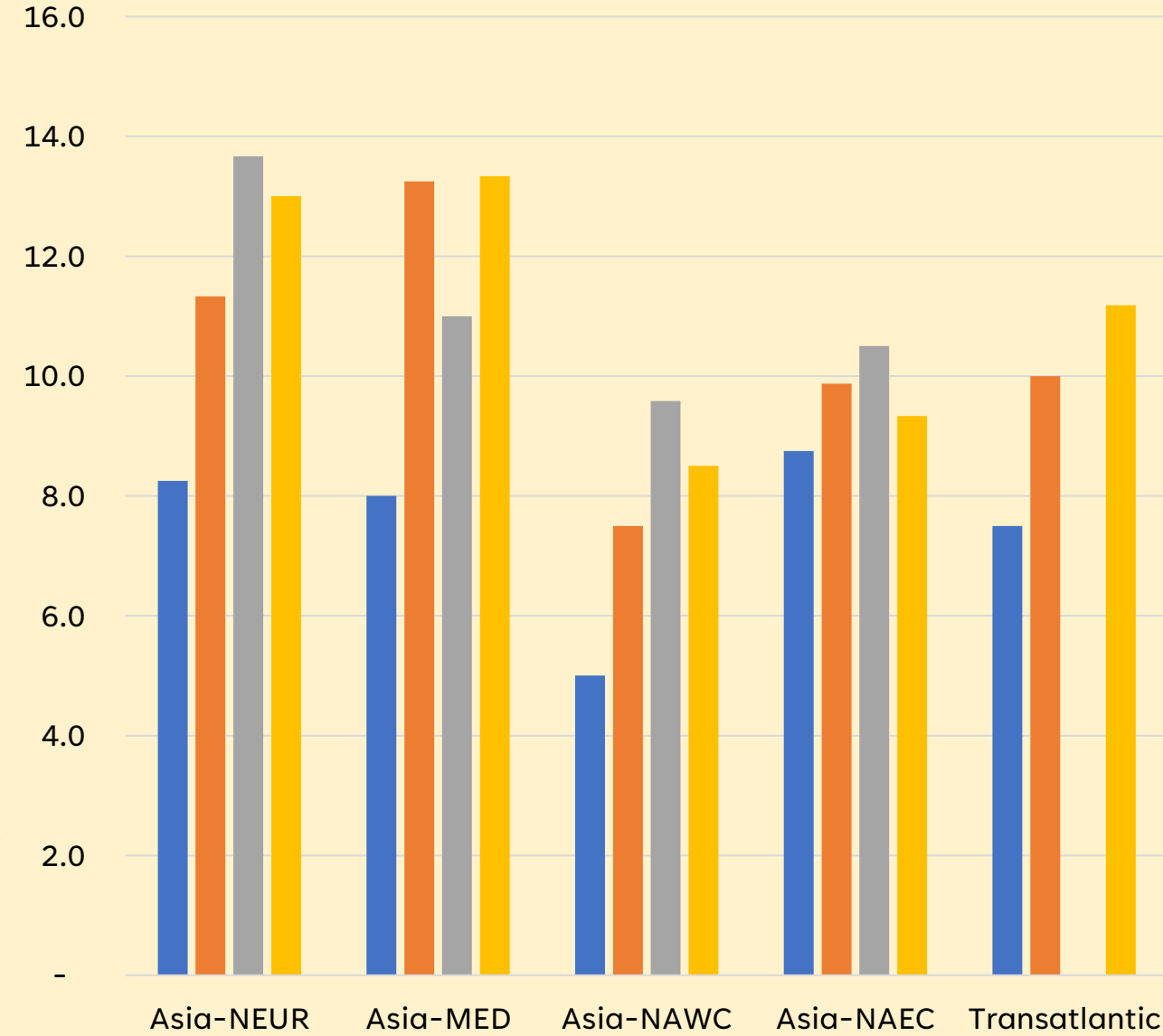
weekly port calls

Weekly port calls per trade

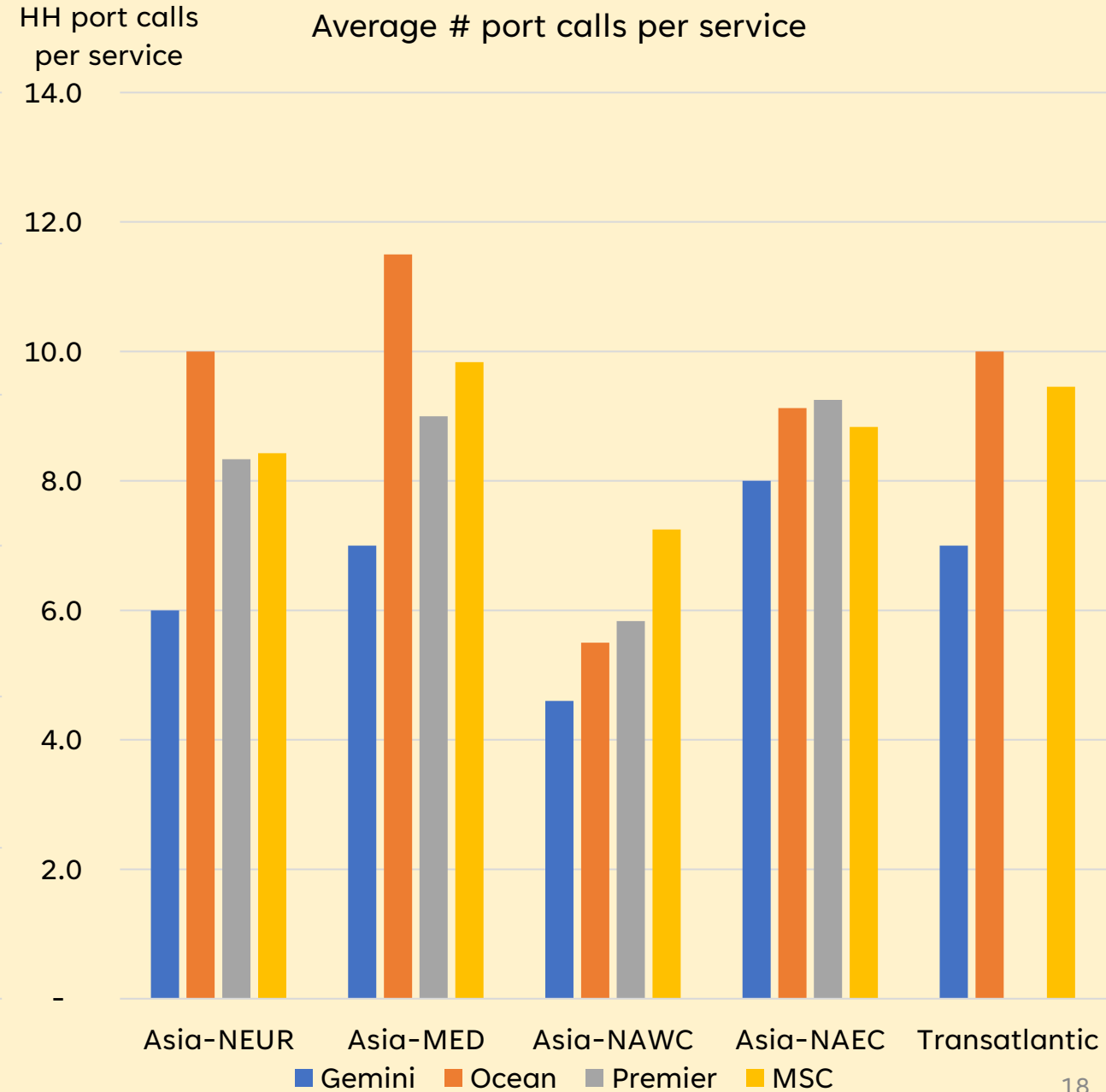
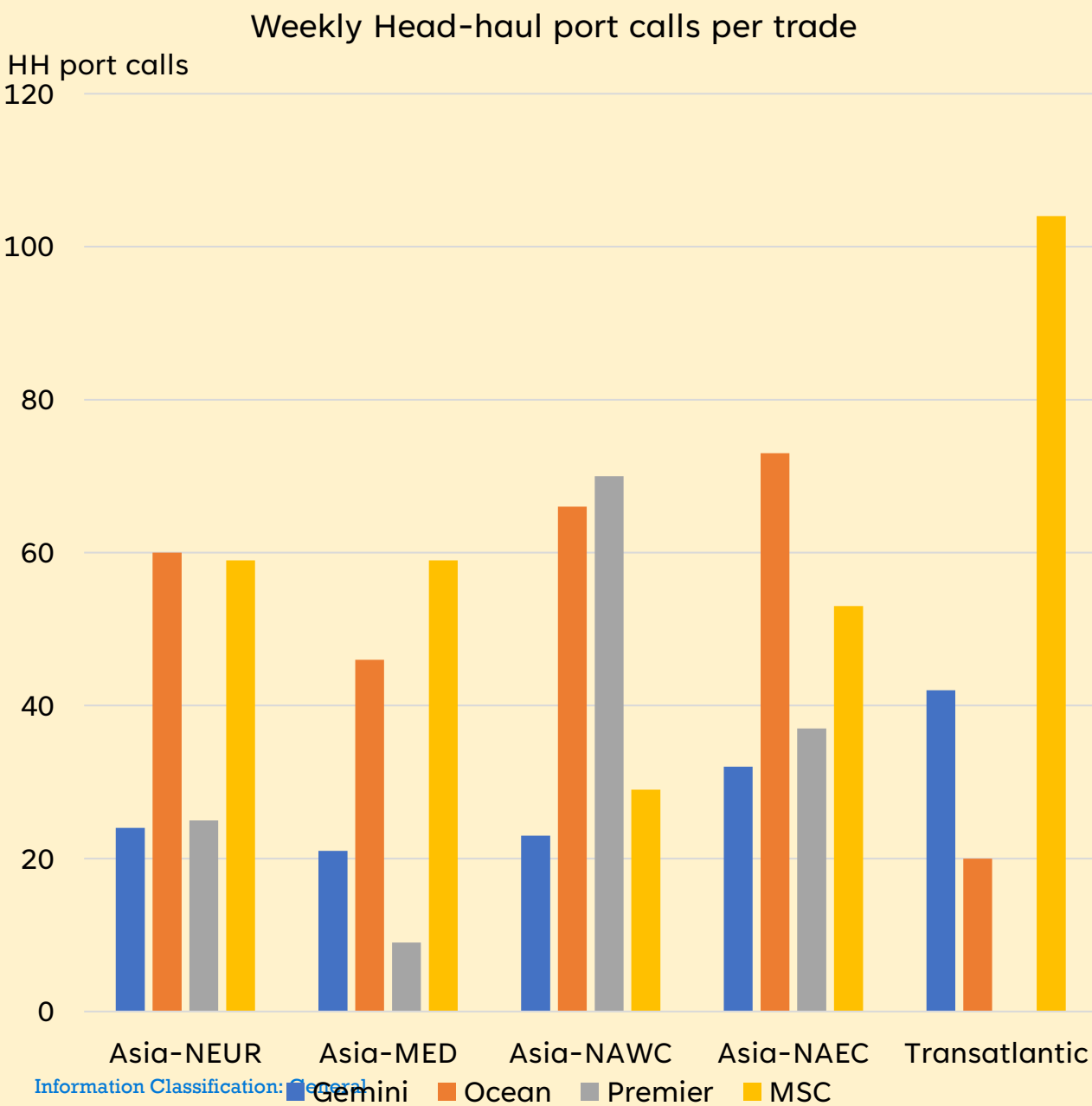


port calls per service

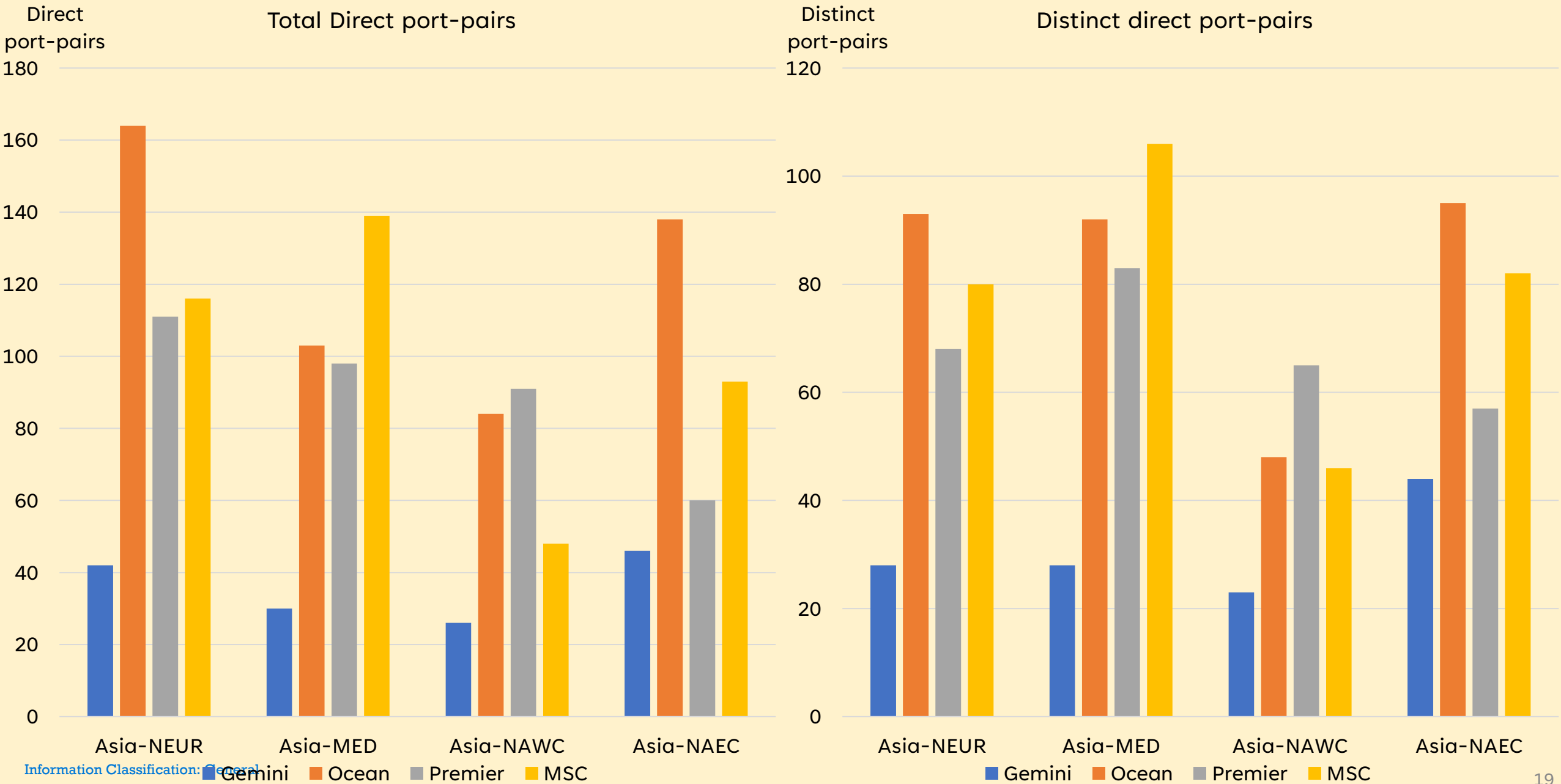
Average # port calls per service



AVG. HEAD-HAUL PORT CALLS PER SERVICE



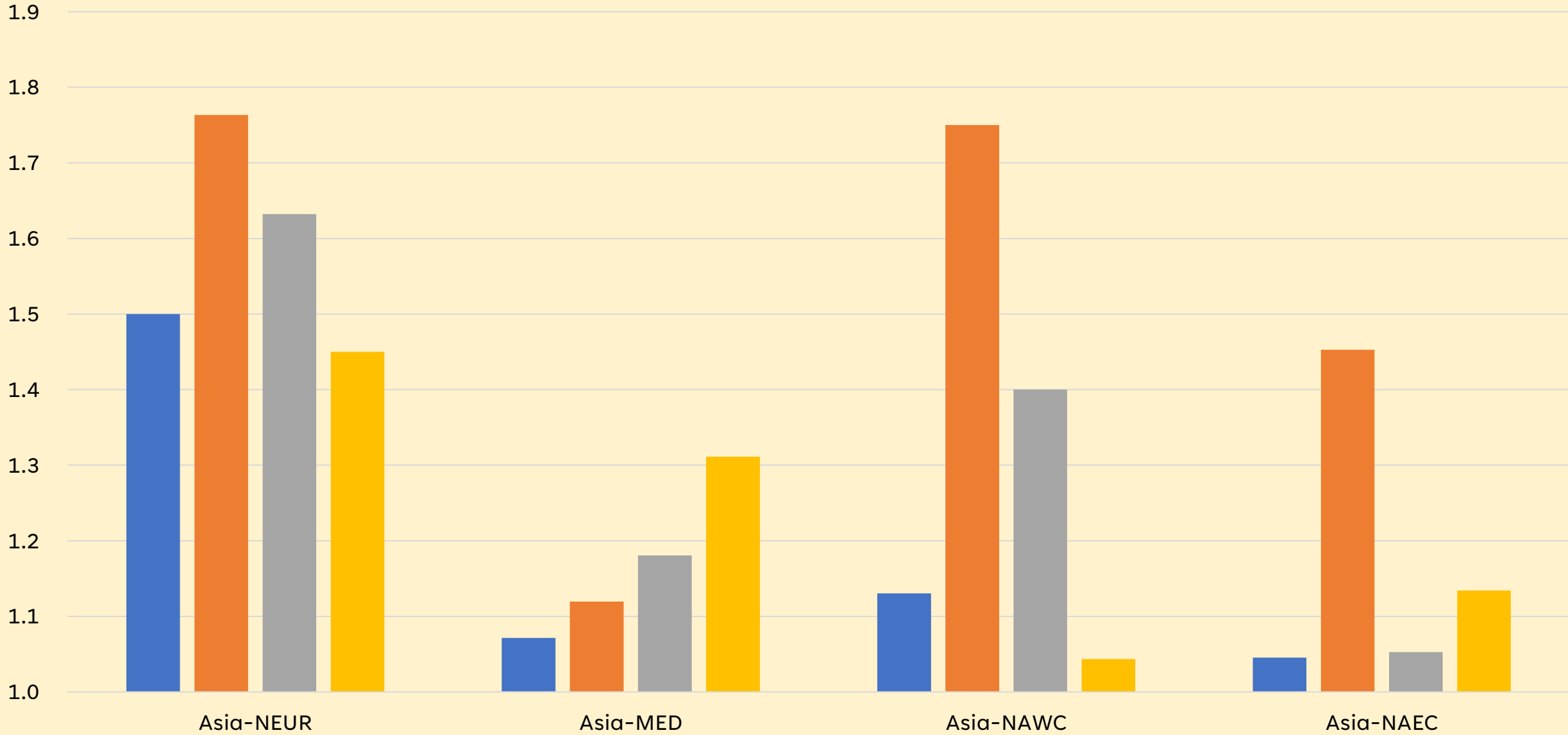
TOTAL DIRECT AND DISTINCT PORT-PAIRS



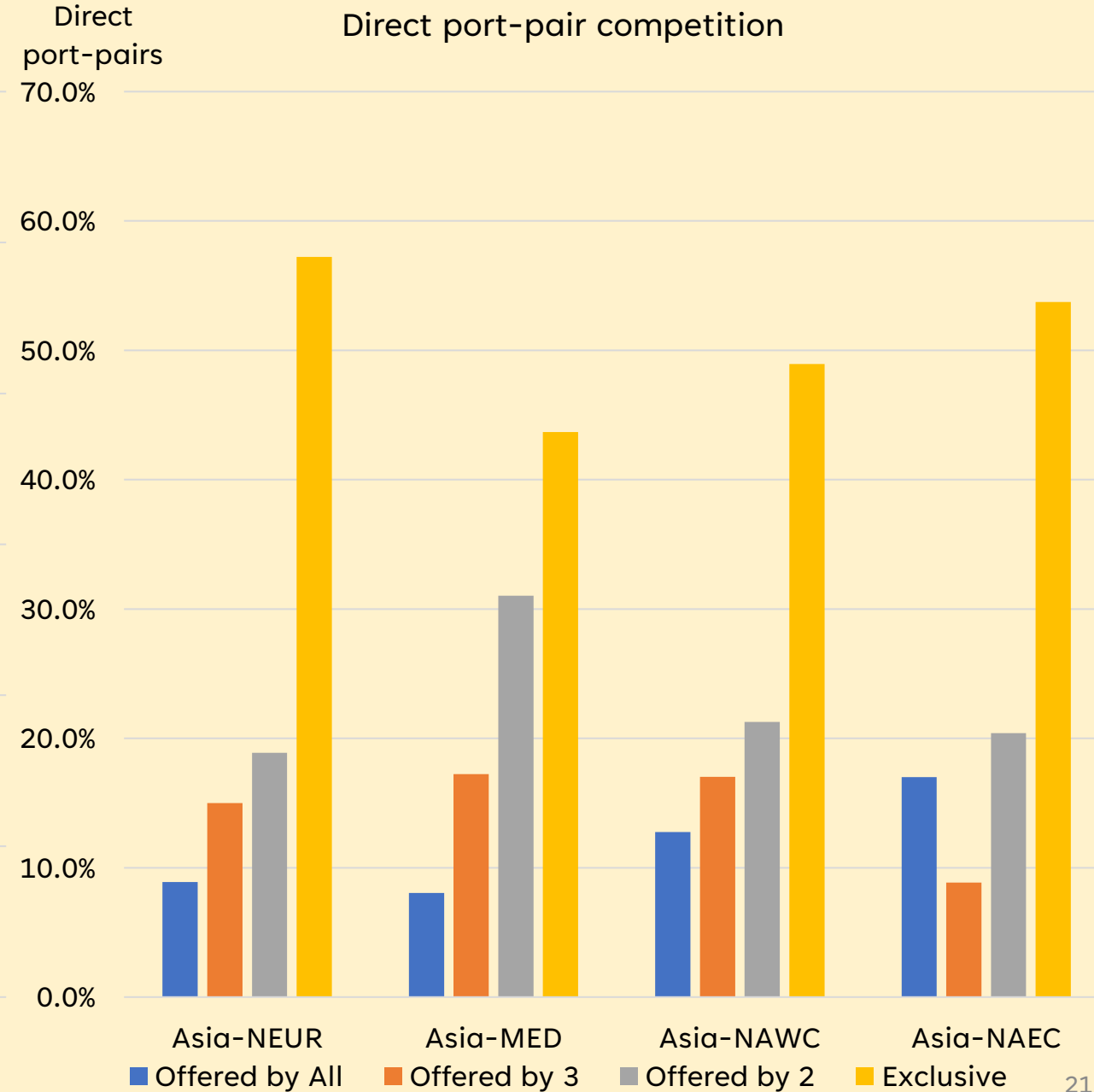
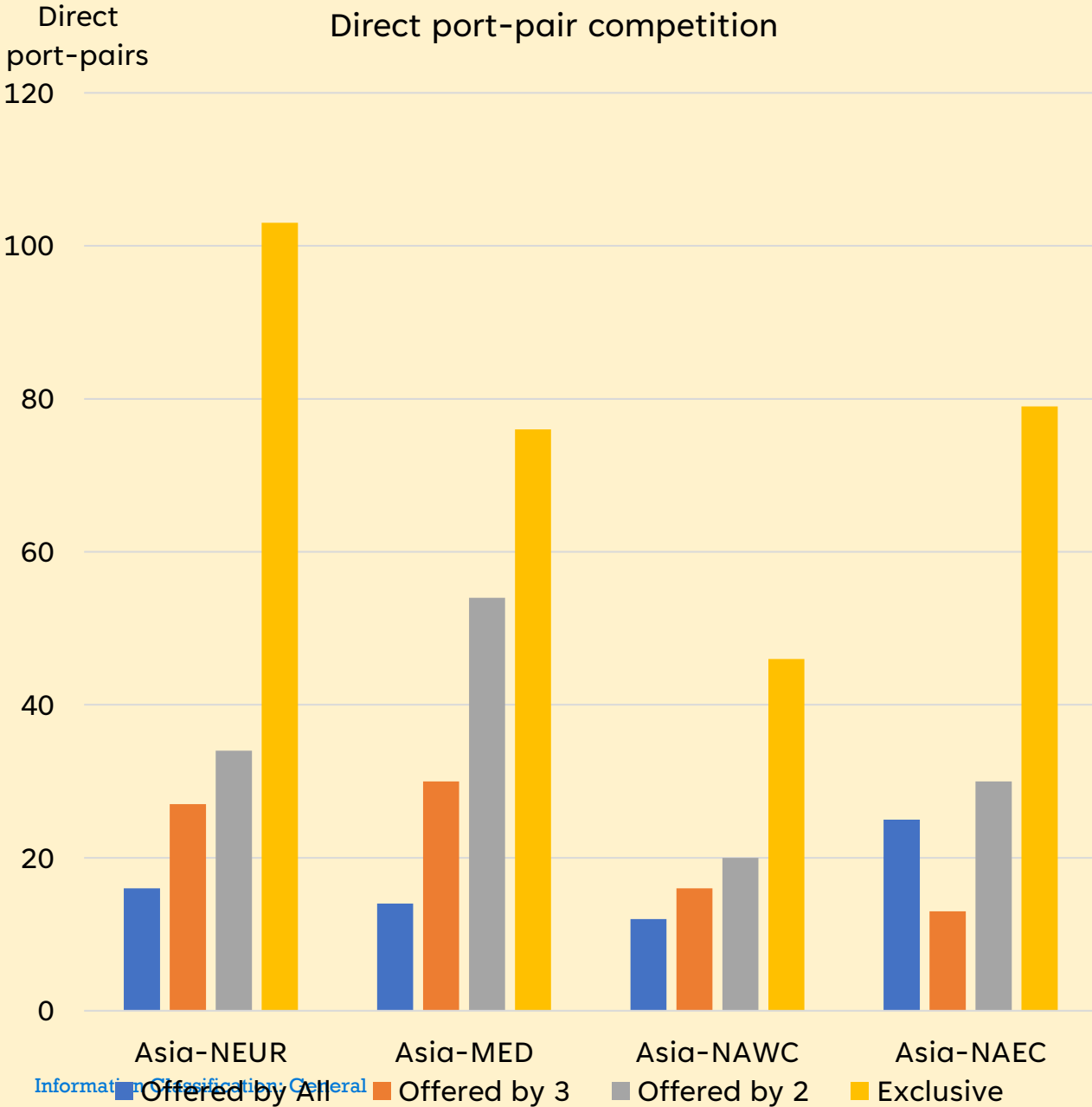
PORT-PAIR FREQUENCY

Average weekly port-pair frequency

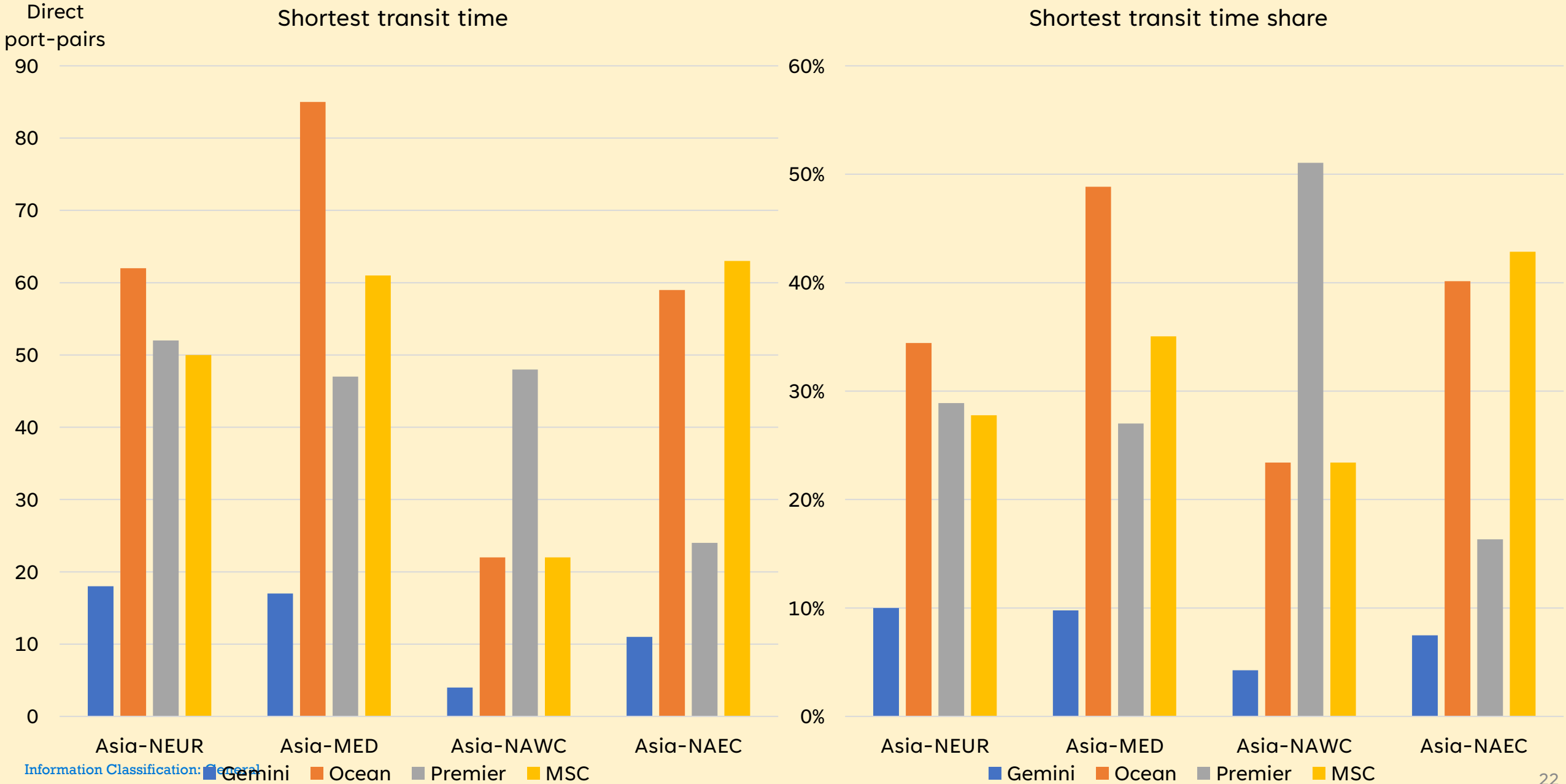
Port-pair
Frequency



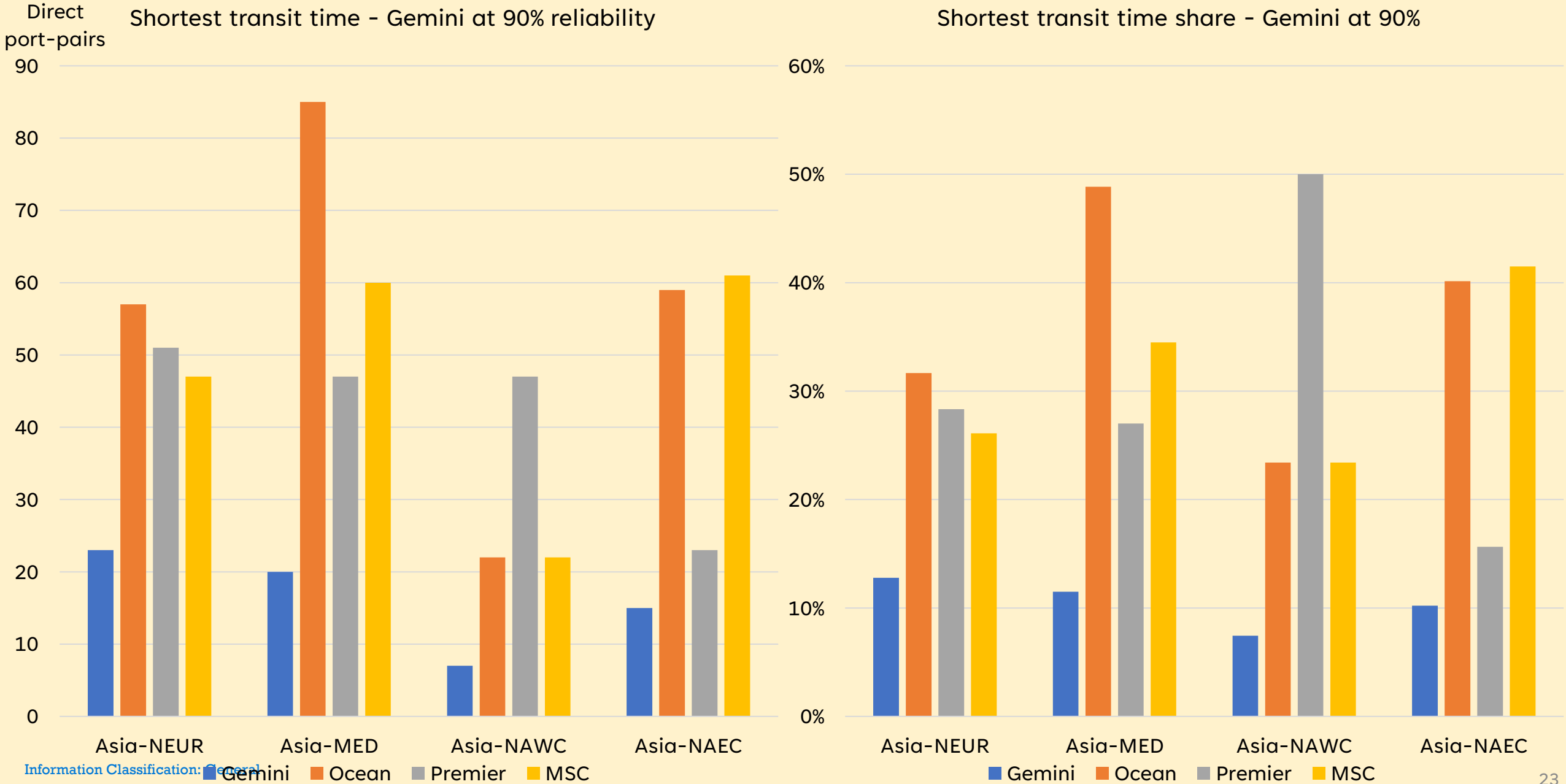
PORT-PAIR COMPETITION AND EXCLUSIVITY



WHO ADVERTISES THE BEST TRANSIT TIMES?



WHAT IF GEMINI HAS 90% RELIABILITY?



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The liner industry's by far most comprehensive study of ocean liner schedule reliability, measuring schedule reliability and vessel delays across all deep-sea liner services in the World. Based on more than 12,000 distinct vessel arrivals each month, across 60+ carriers, 300+ loops, and 34 trade lanes.



Trade Capacity Outlook

The liner shipping industry's only forward-looking capacity deployment report, based on actual named vessel schedules. The report covers every single vessel sailing, in every single week, across all loops/services in 19 main deep-sea trade lanes, and provides a 12 week outlook of capacity fluctuations.



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