



XENETA

2025 Ocean Freight Outlook

Key factors that will impact the container shipping market

TOC Asia, 26-27 November 2024



Informing budget and planning, strategic alignment, CSC resilience

Our latest product release

Market Rate Outlook: End of April 2025

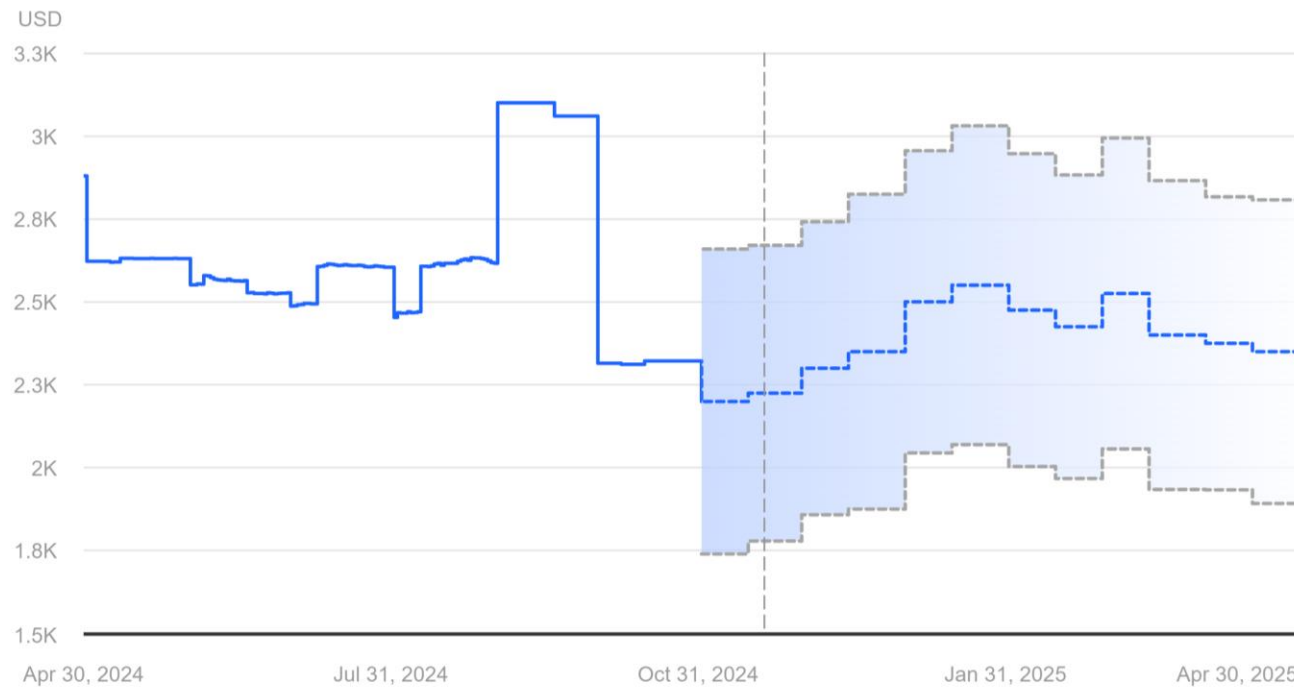
Far East Main - Mediterranean Main

Change

+6% vs Today

Prediction range

\$1,893 to \$2,807



What is impacting the market?

As the premium to Far East - Europe has been restored the weakness of the overall market will also weight down on this trade, as long-term rates trend lower.

Key factors

Stable Demand

Weak Demand

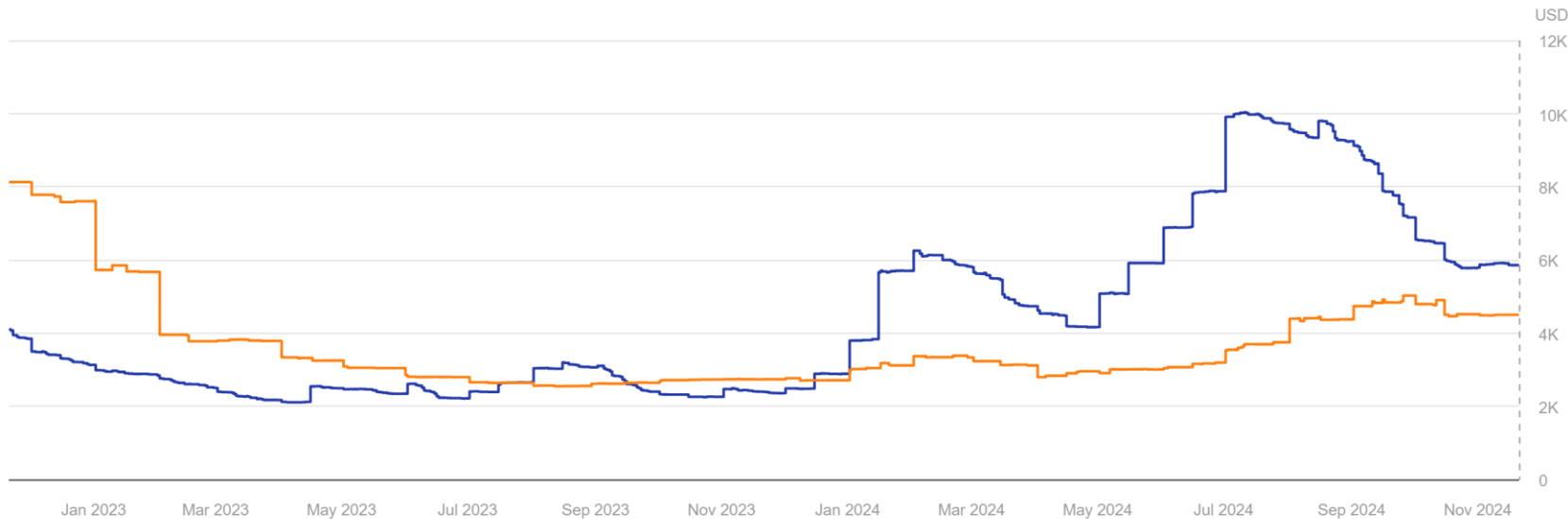
Prediction confidence 80%

A 2-year perspective on Trans-Pacific

Rate movement

Market Average⁺ for Short-term, Long-term — last 3 months⁺ contracts, 40' DC⁺ container type and THC Destination.⁺

From Far East Main⁺ to US East Coast Main⁺ trade lane
Nov 2022 - Nov 2024 (undefined)



Legend

- Market rate — average, regional ^
- Short-term 250K+ contracts x
- Long-term — last 3 months 6.0K+ contracts x



2025 will see 3% more boxes moved but without the Red Sea disruption TEU-miles may drop by 11%.

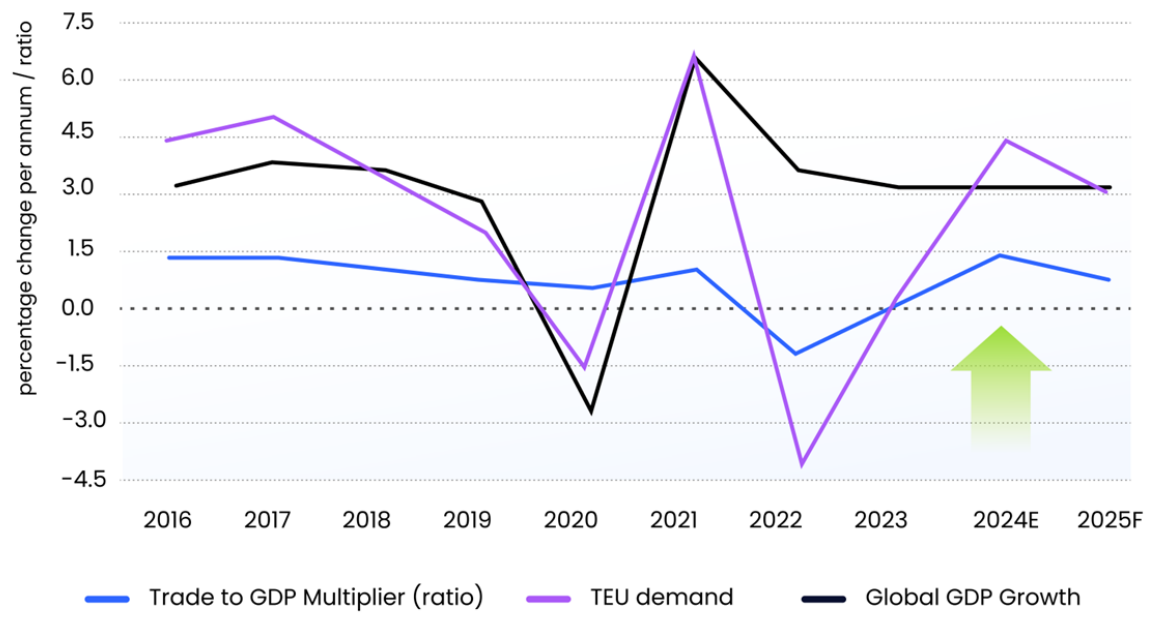
3%

-11%

Major frontloading in 2024, 2025 looks set to be quieter

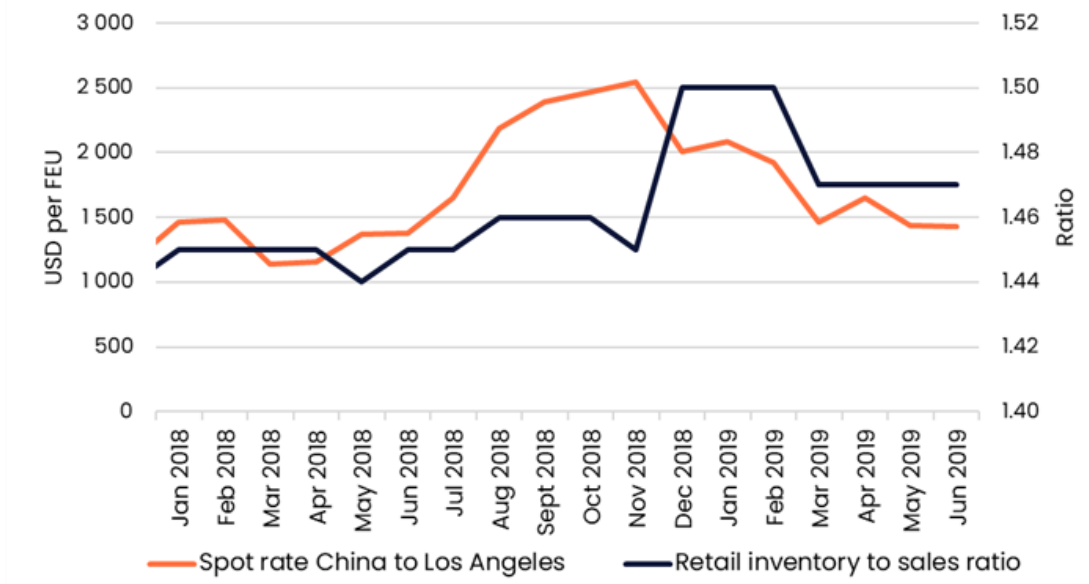
2024 was a year of front-loading, 2025 will see a return a Trade-to-GDP multiplier around 1 – after lift following US election result

Identifying frontloading, 2016-2025F



Source: Xeneta, Container Trades Statistics, IMF

Frontloading during 2018 US/China trade war



Source: Xeneta, US Census Bureau

What happens if ships return to the Red Sea?

TEU-miles will be key. Limited upside potential in work for containerships

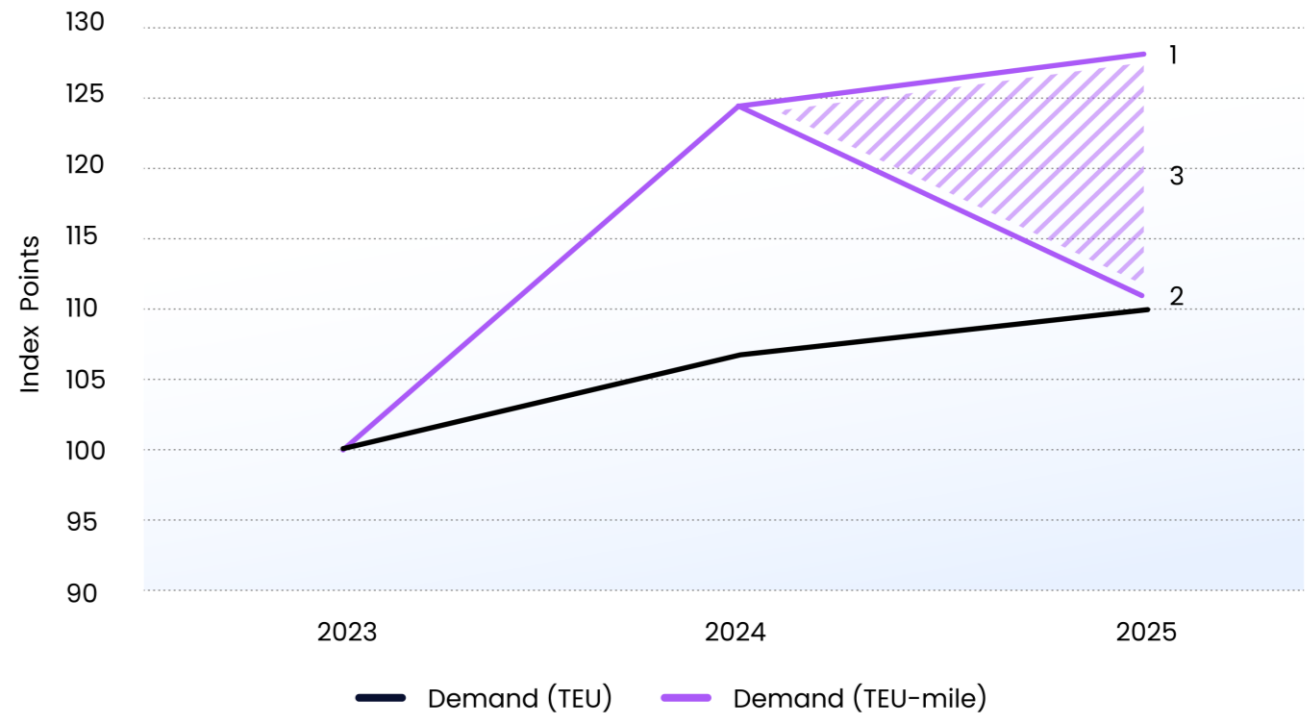
3 scenarios for 2025

Scenario 1:
No return to Red Sea

Scenario 2:
Full return to Red Sea

Scenario 3:
Partial return

Range for TEU-mile demand in 2025



Source: Xeneta, Container Trades Statistics

Global shocks that hit 2024 – and will do it again in 2025

Geopolitics and regional disputes that shipper should plan for are plenty

PORT STRIKE LOCATIONS



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Outlook – get it here

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INSIGHTS | OCEAN FREIGHT SHIPPING



Thanks!

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