

Container Shipping Market Normalisation How will we get there?

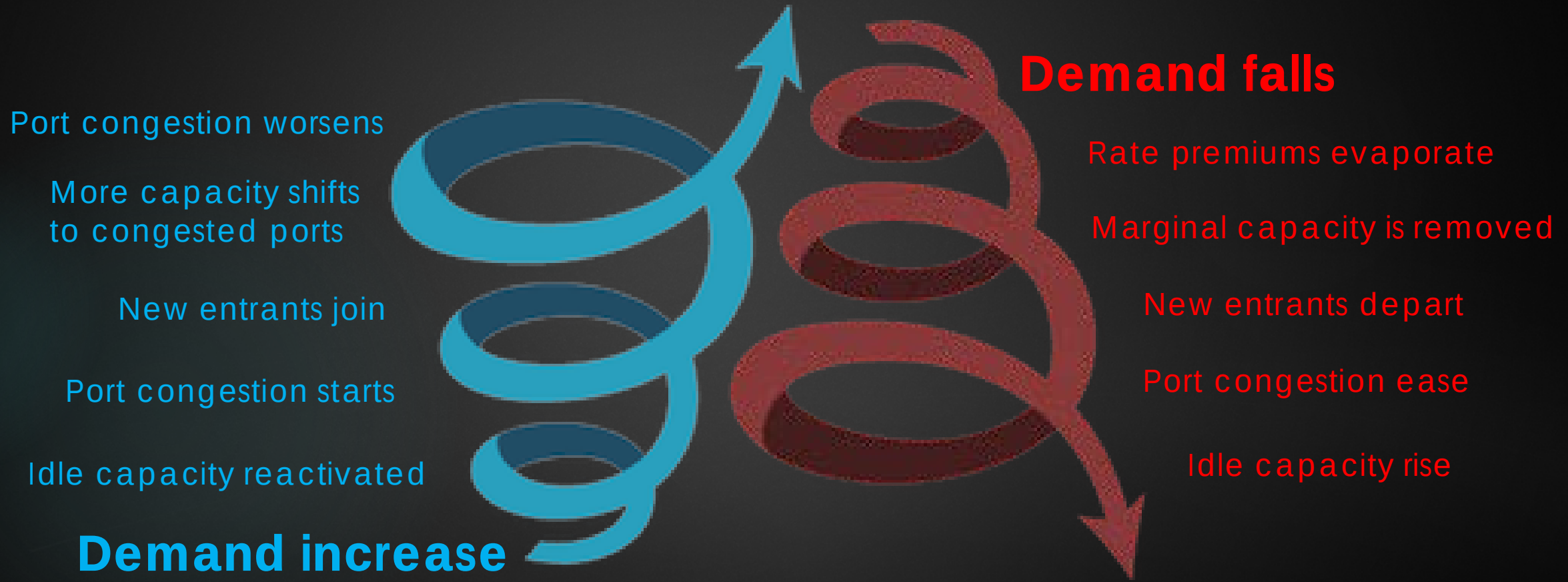


The upward rate spiral – When will it normalise?

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Although the current focus is on port congestion, the main driver is still container demand

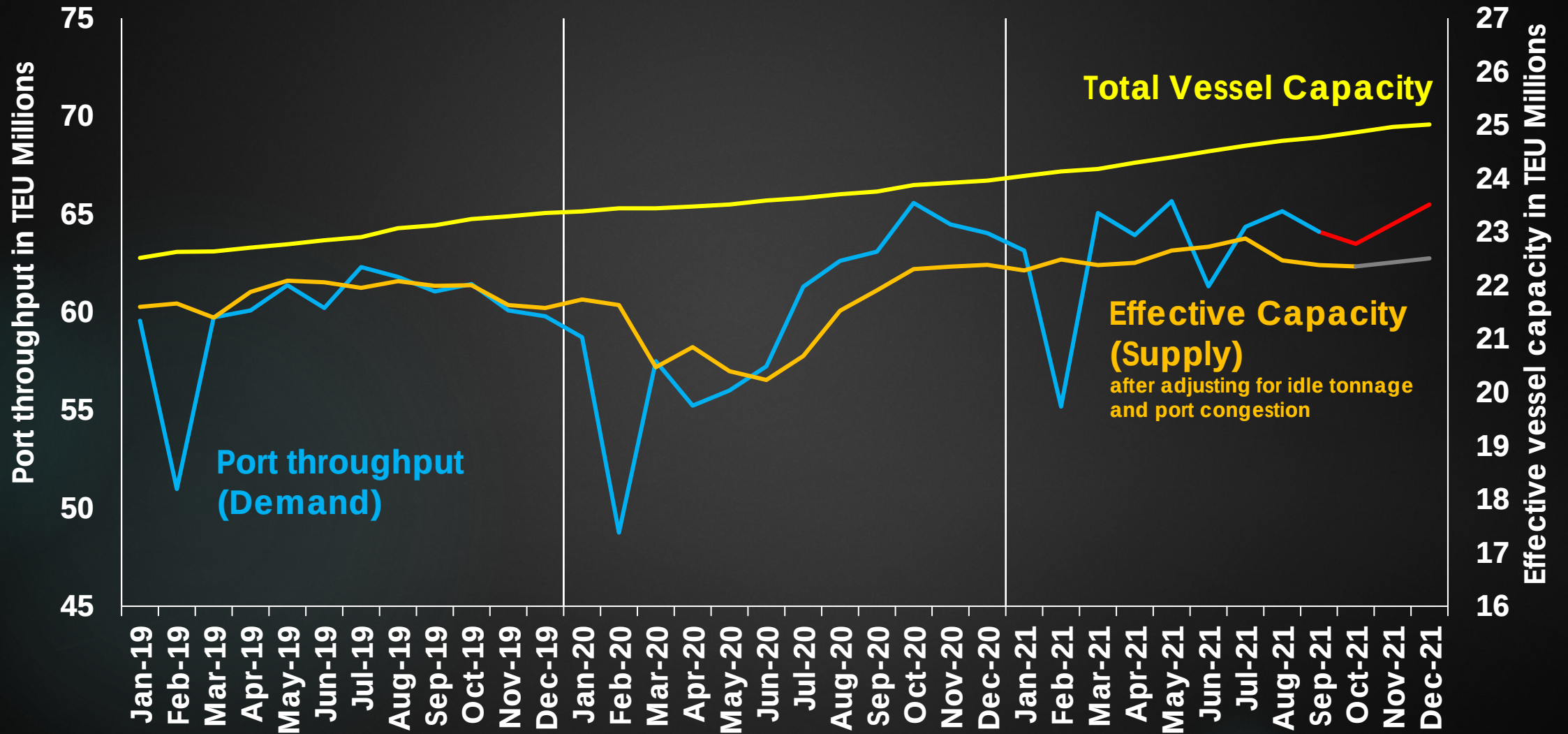


Demand growth still ahead of effective supply

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Container demand vs supply trend : 2019-2021



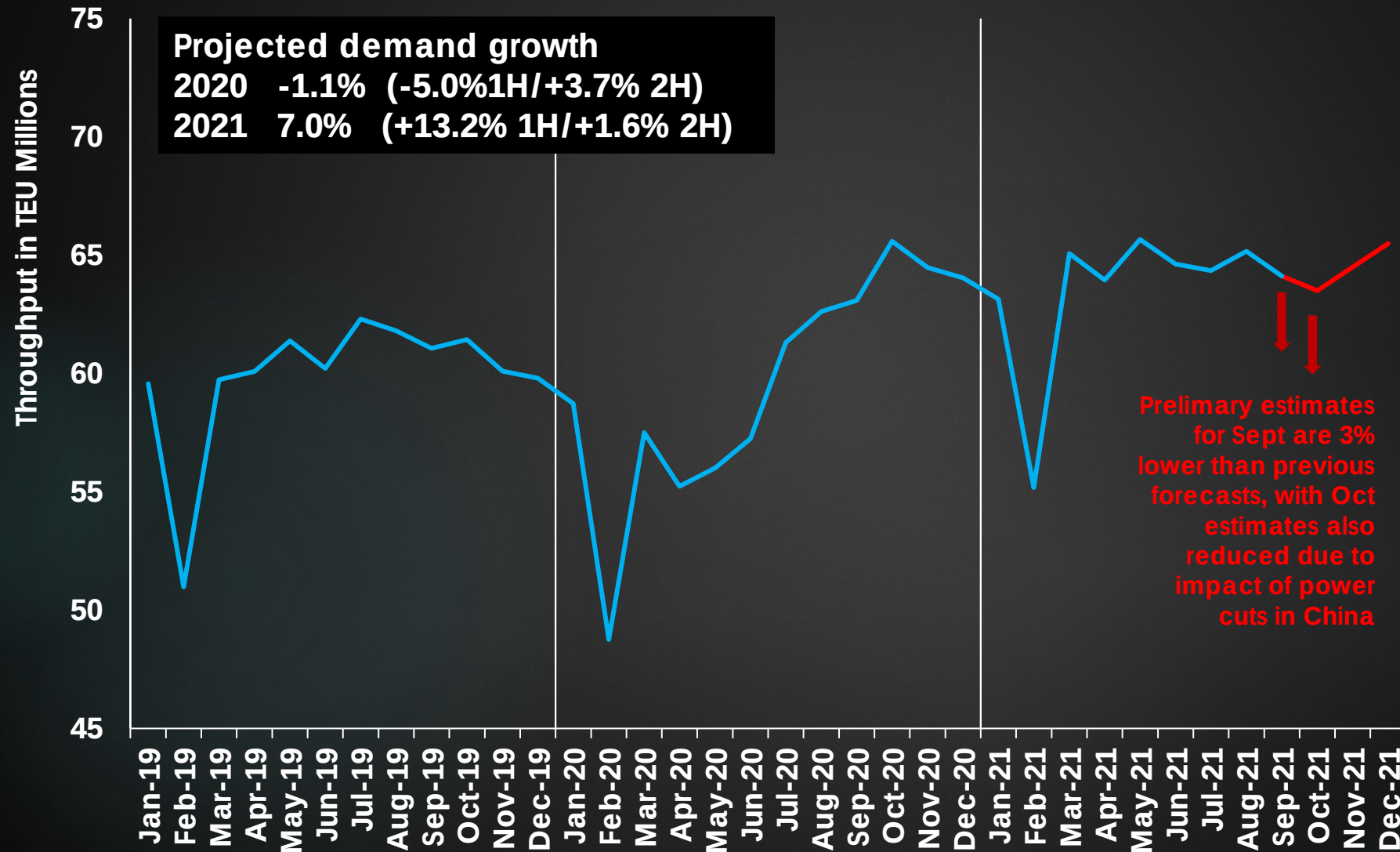
High demand has driven supply chain chaos

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Monthly Port Volumes - Linerlytica Global Sample



Jan-Sep 2021 growth %

	vs 2020	vs 2019
Global Sample	10%	6%

Breakdown by region

China & HK	9%	7%
Other North Asia	6%	1%
SE Asia	9%	6%
Indian sub-cont.	19%	9%
Middle East	0%	-1%
North America	20%	13%
Latin America	15%	11%
North Europe	8%	2%
South Europe	7%	3%
Africa	19%	16%
Oceania	12%	10%

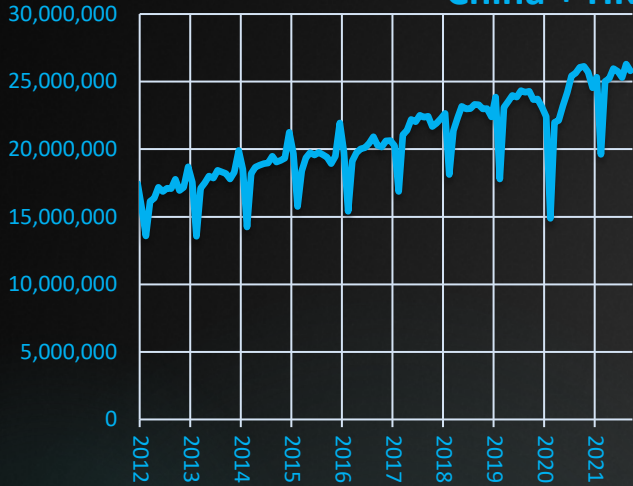
High container volumes driven by US and China

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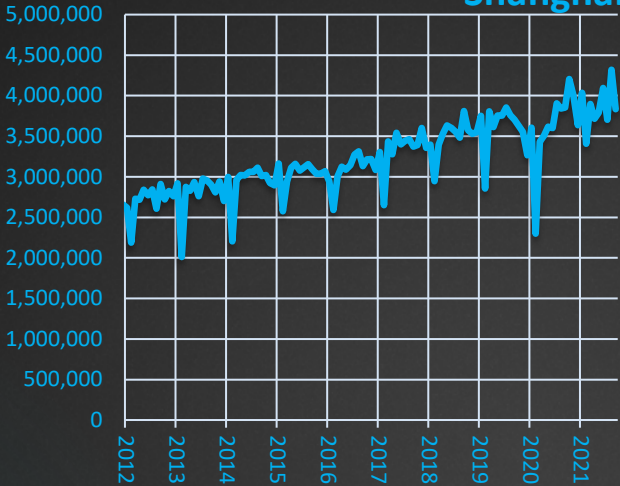


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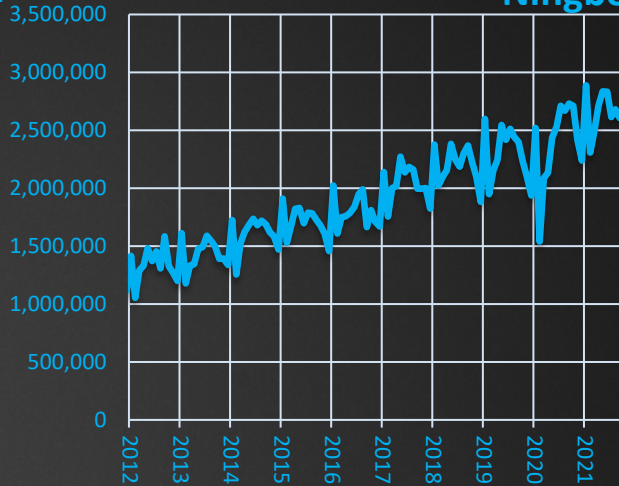
Container throughput in TEU



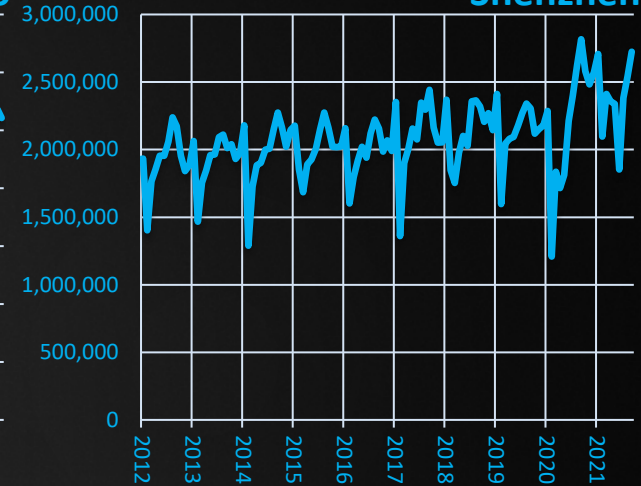
Container throughput in TEU



Container throughput in TEU



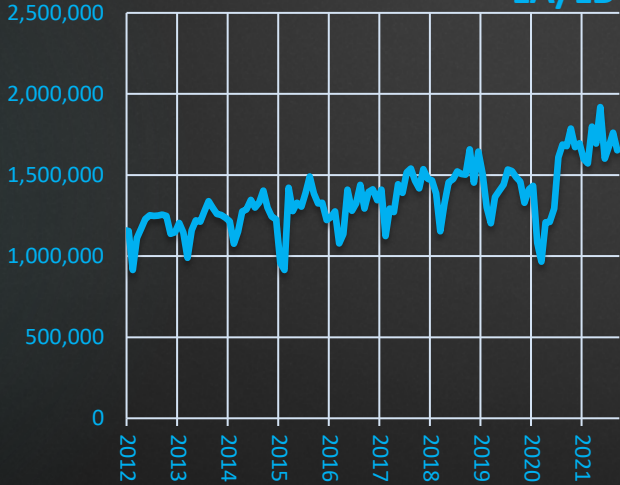
Container throughput in TEU



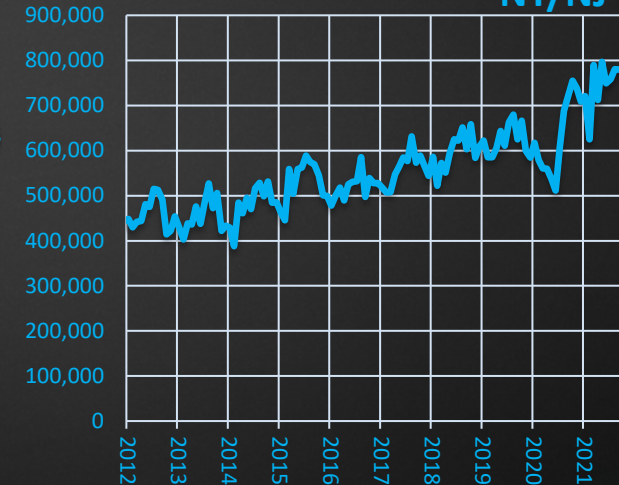
Container throughput in TEU



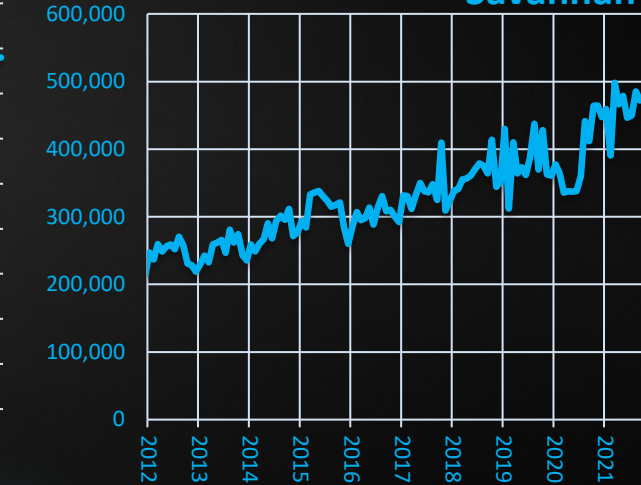
Container throughput in TEU



Container throughput in TEU



Container throughput in TEU

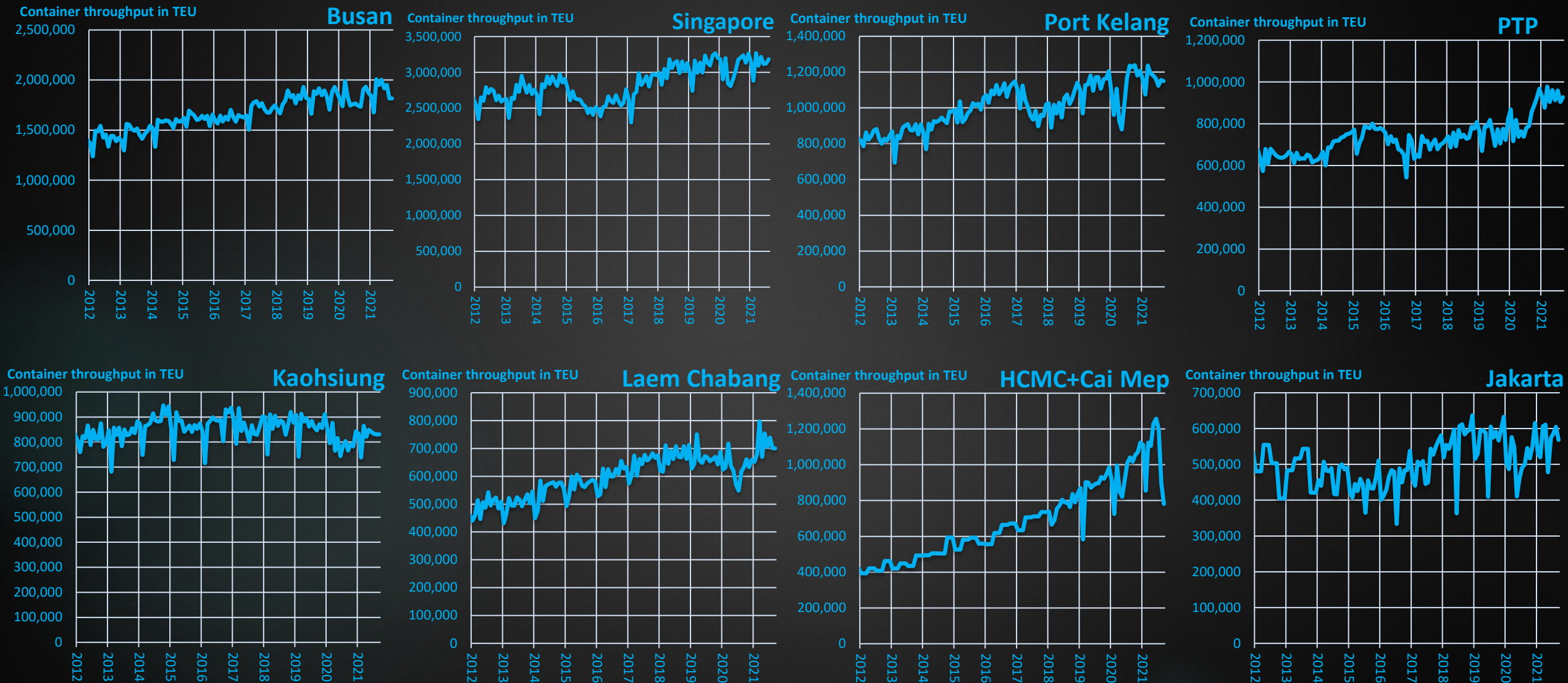


Regional Asia volumes mixed

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Congestion has taken up to 10% of global fleet

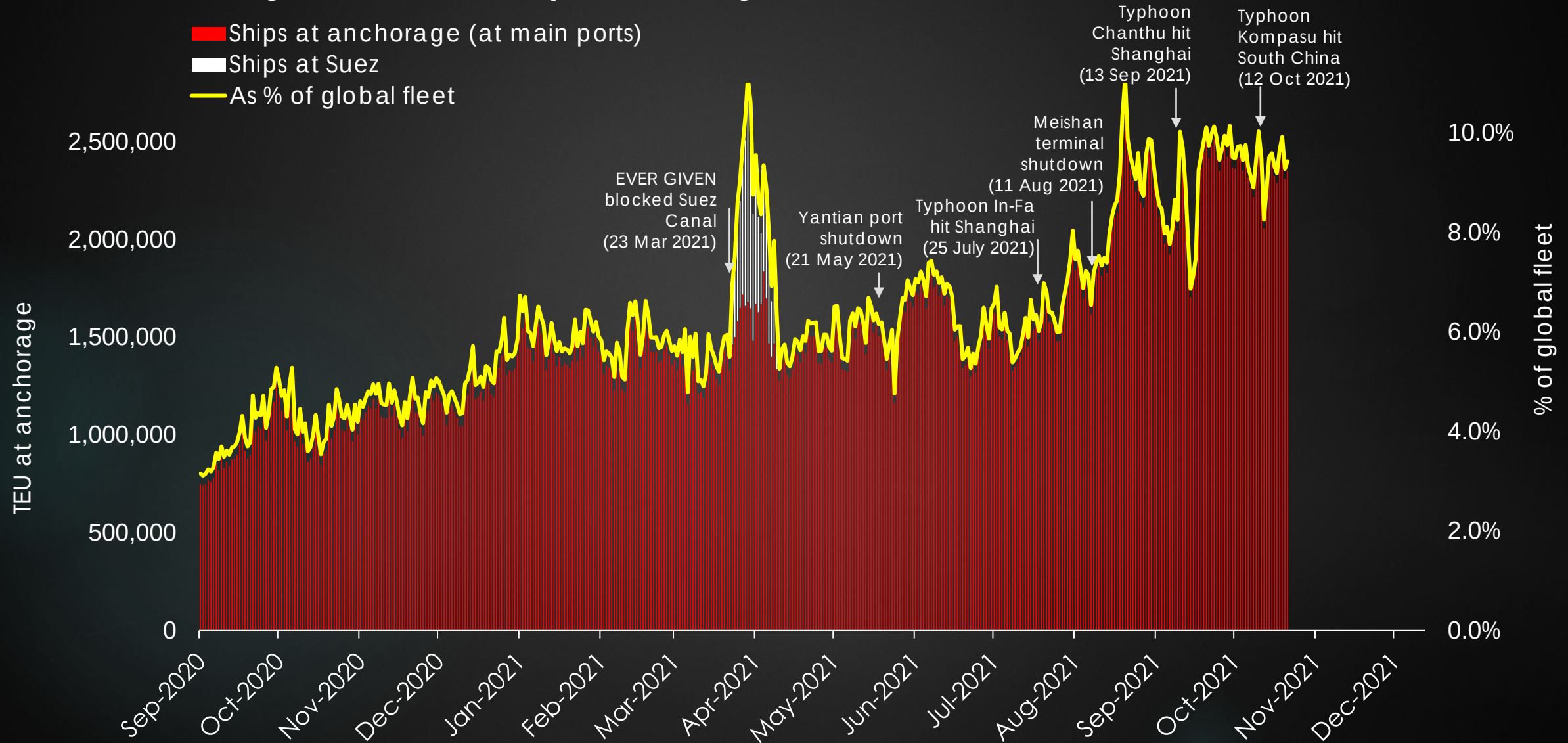
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% of global fleet at main port anchorages

- Ships at anchorage (at main ports)
- Ships at Suez
- As % of global fleet

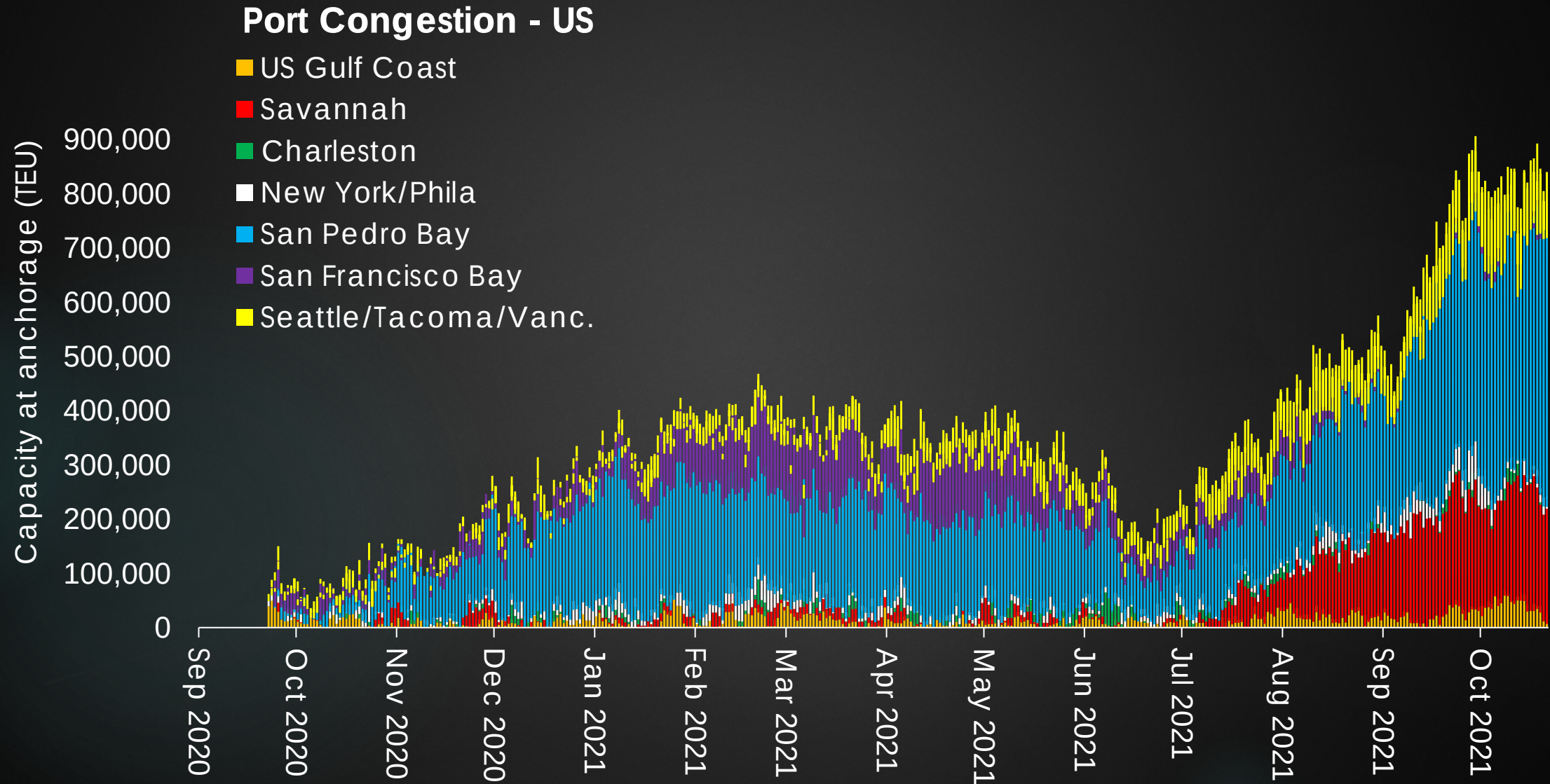


US port congestion at critical levels

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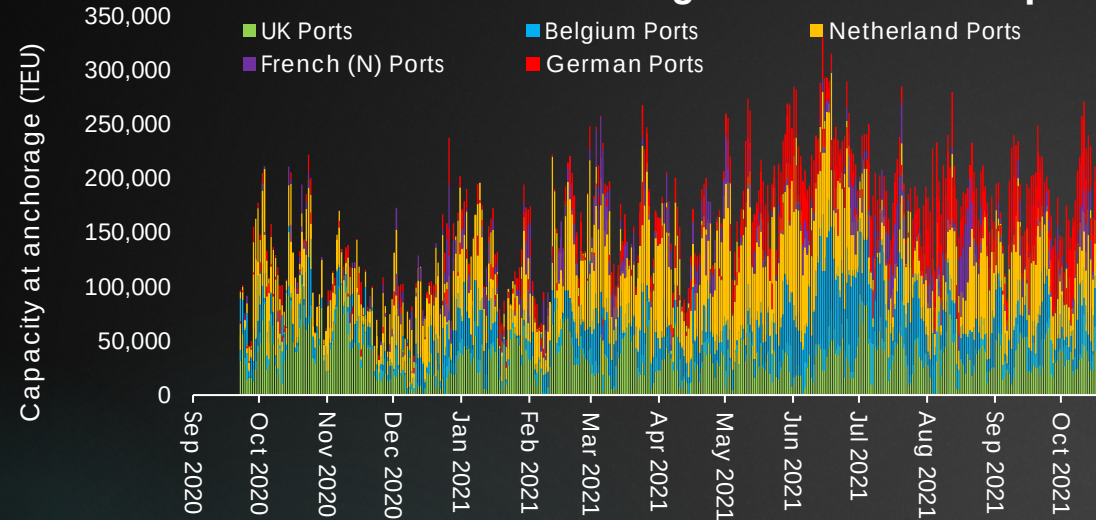
North Europe congestion remains high

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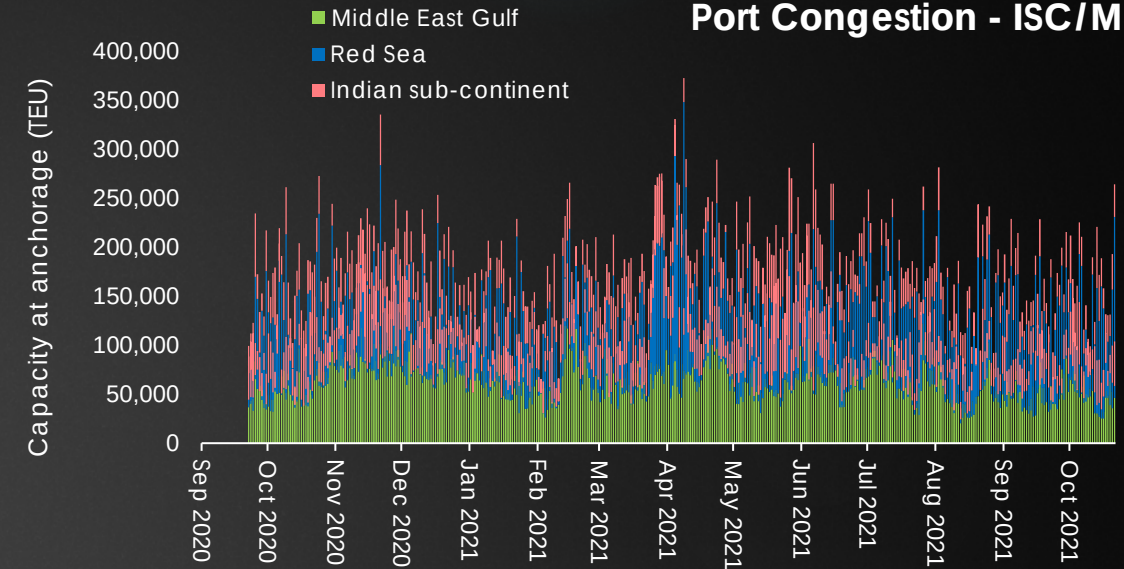


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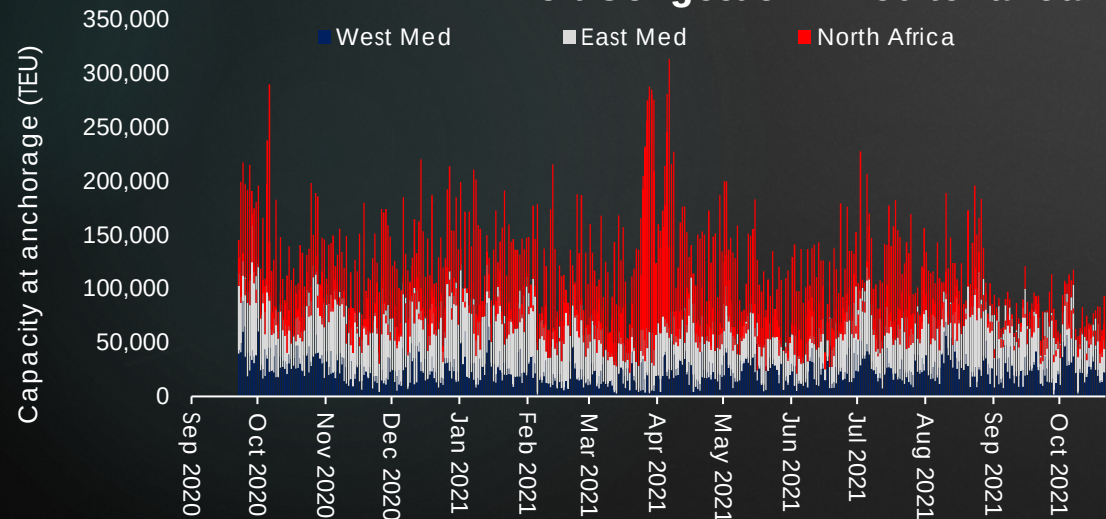
Port Congestion - North Europe



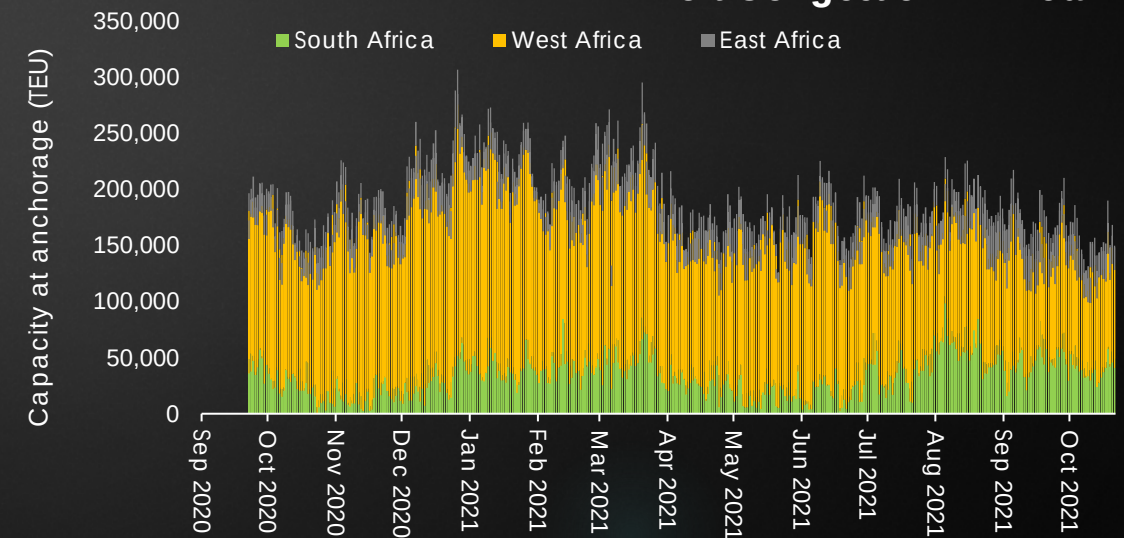
Port Congestion - ISC/ME



Port Congestion - Mediterranean



Port Congestion - Africa



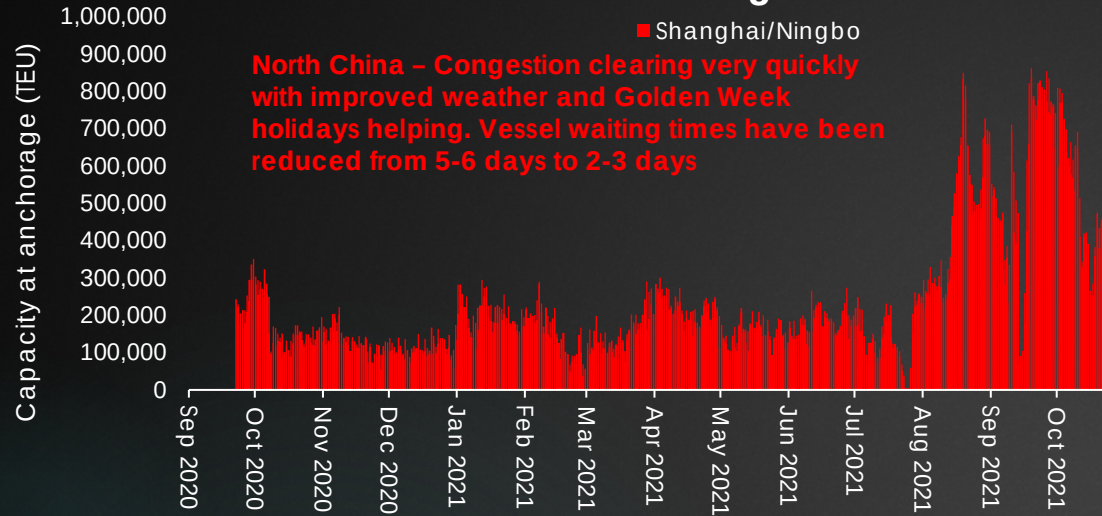
Improvements in North China to continue

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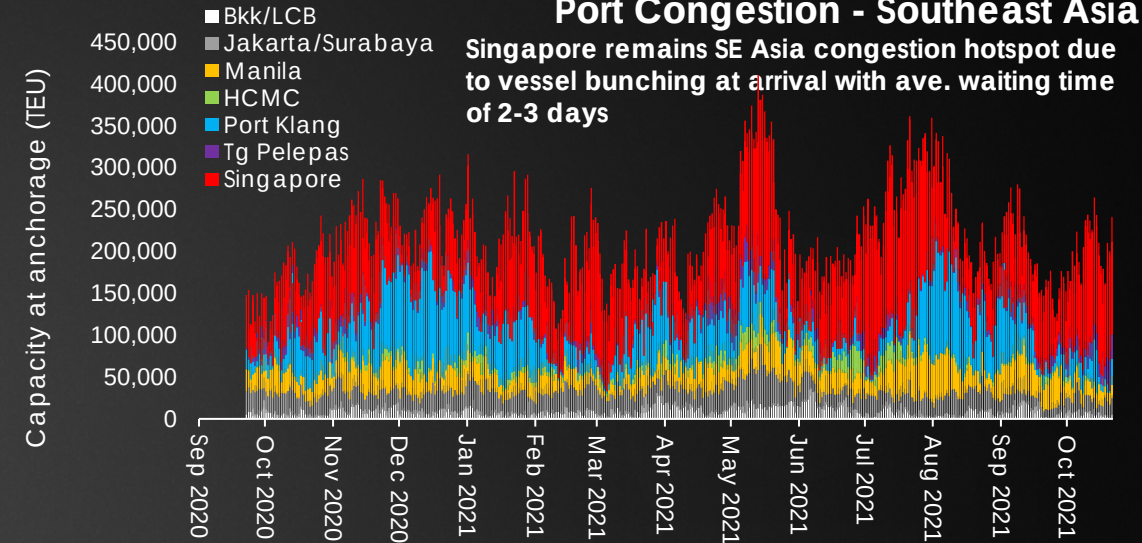


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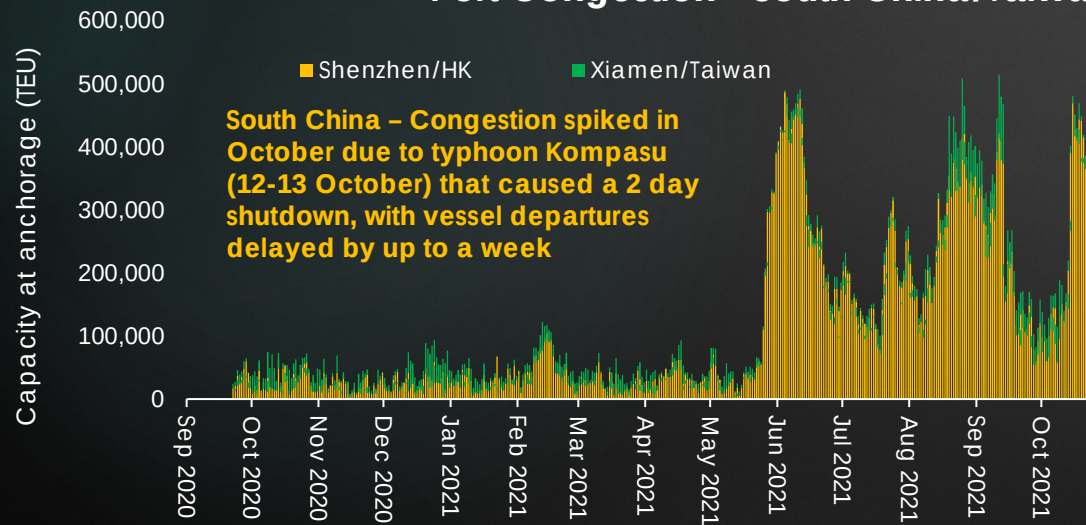
Port Congestion - North China



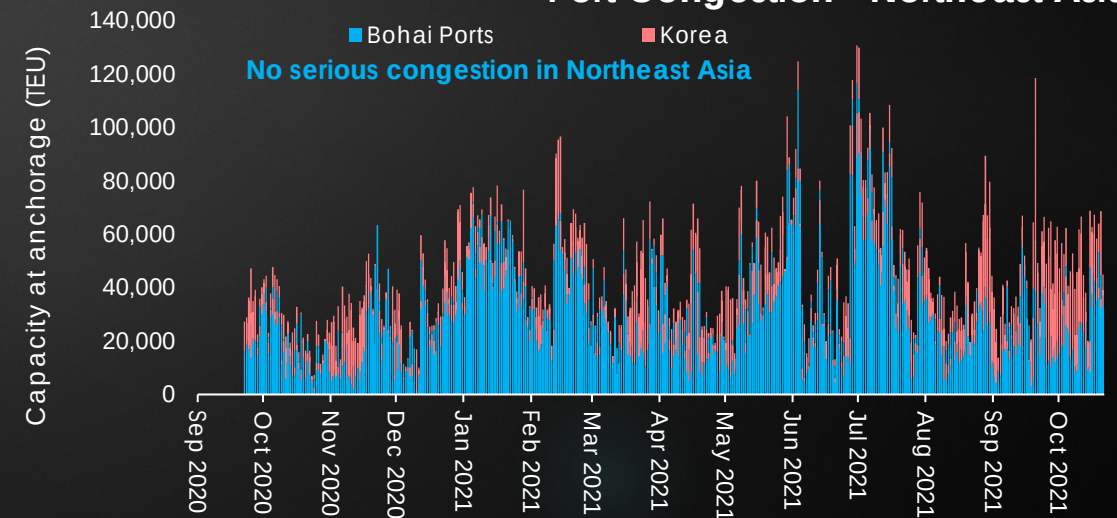
Port Congestion - Southeast Asia



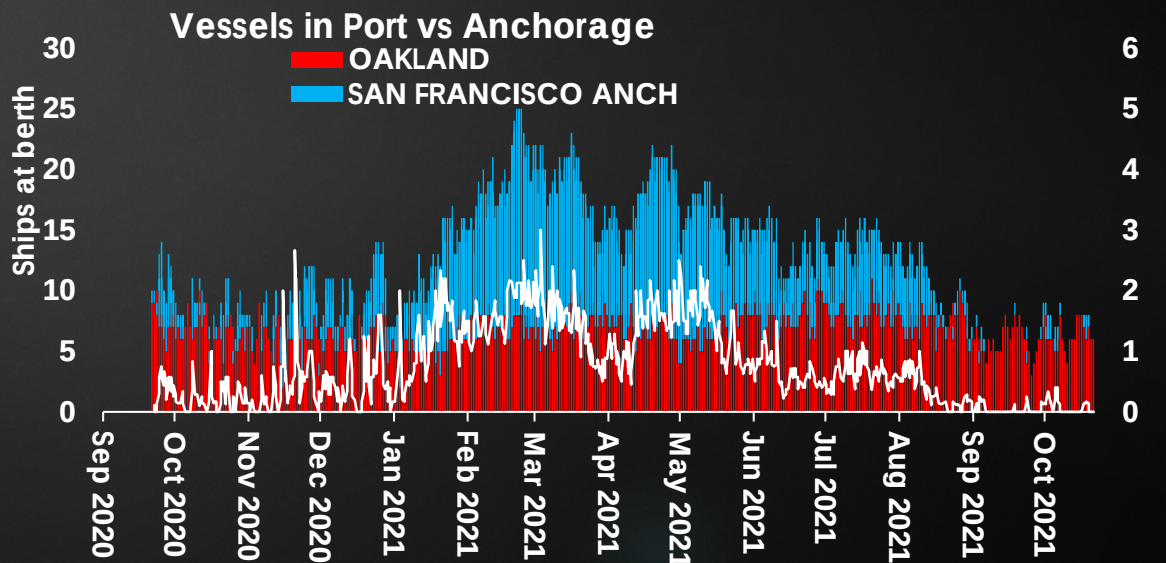
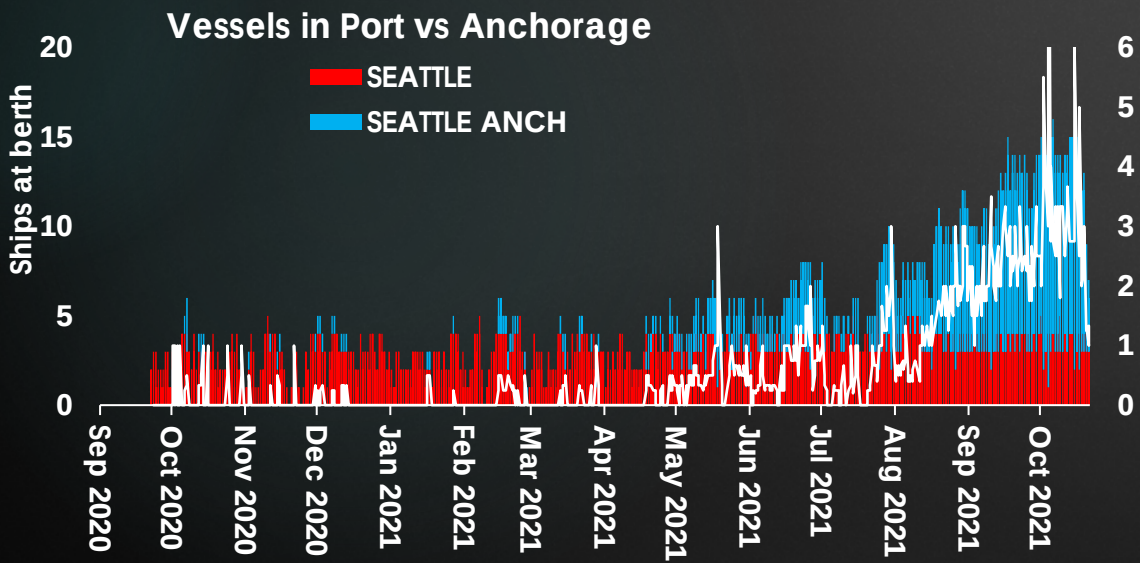
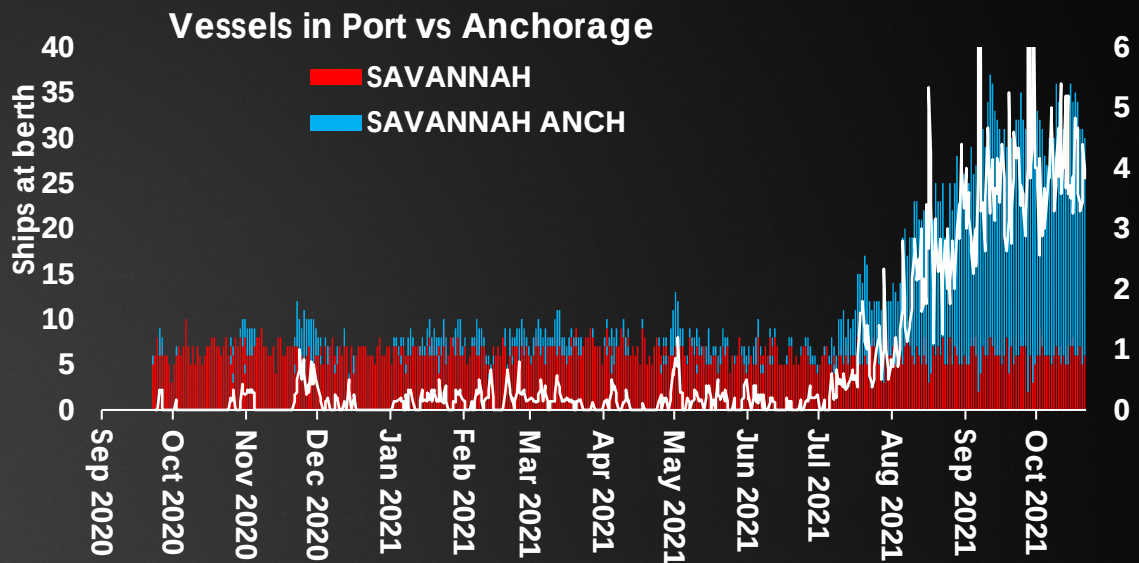
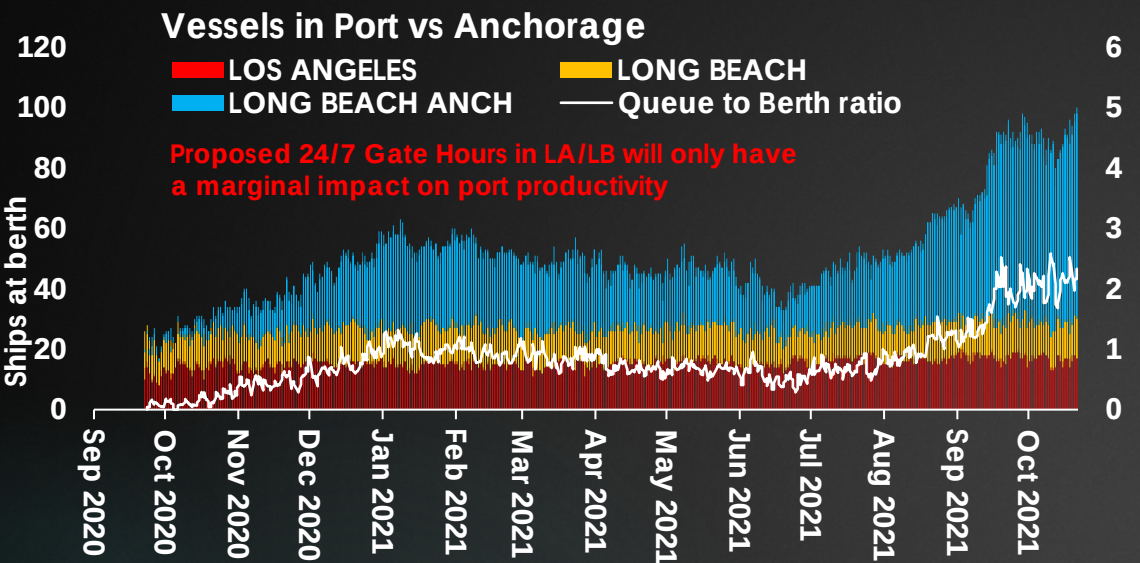
Port Congestion - South China/Taiwan



Port Congestion - Northeast Asia



Serious congestion at LA, Savannah, Seattle



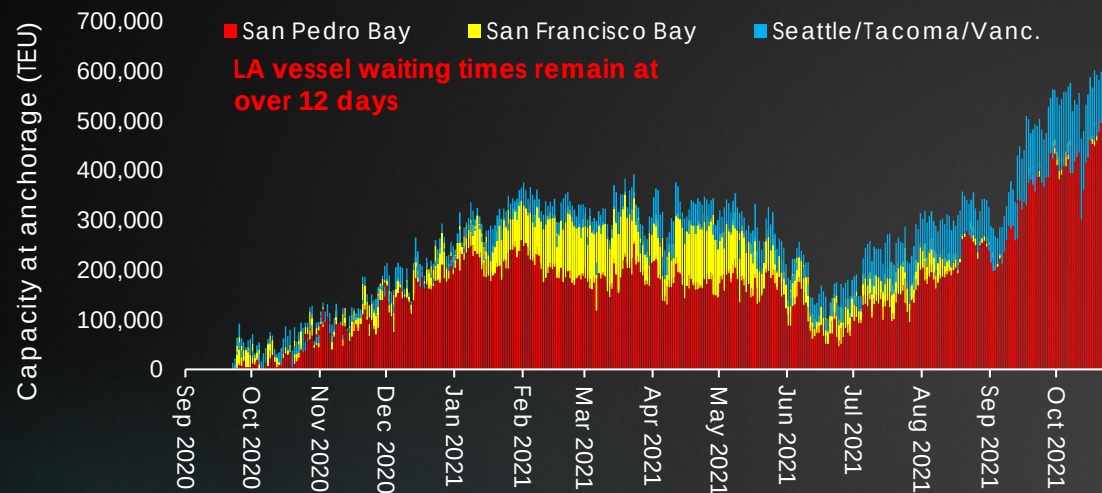
No short term fix for LA/Savannah congestion

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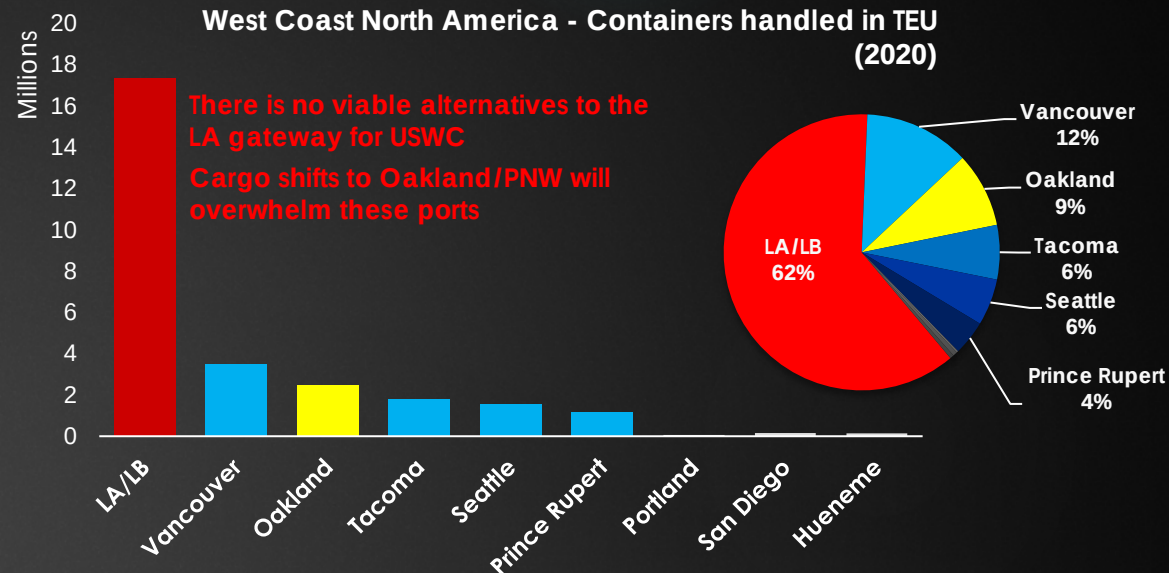


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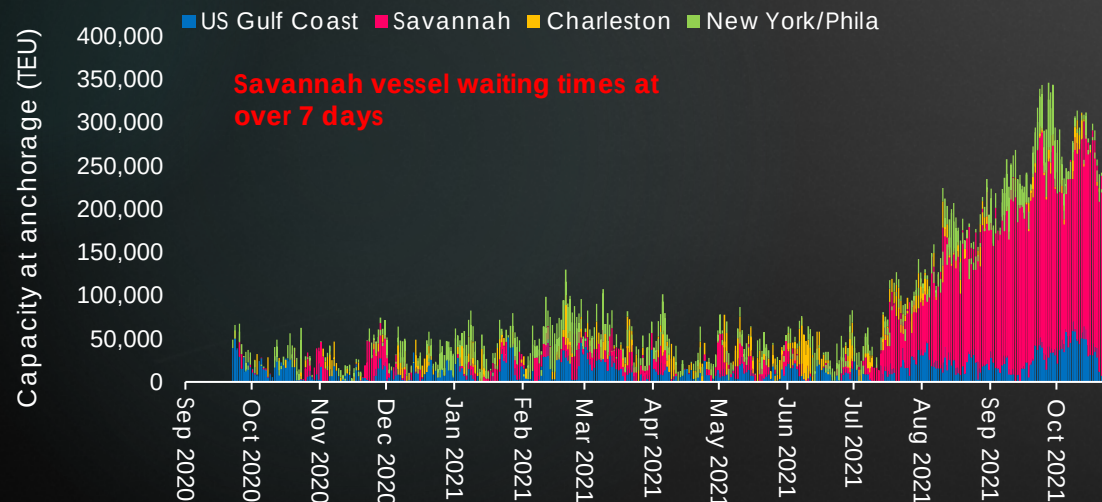
Port Congestion - US West Coast



West Coast North America - Containers handled in TEU (2020)



Port Congestion - US East Coast



East Coast North America - Containers handled in TEU (2020)

