ATSea Consulting
Reaching for the Top Tiers Efficiency in Containership Operation

SMDG Genoa

State of the carrier industry

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1. High rate of consolidation yet to be done in 2017- 2018
    1. MSK + HSD
    2. CMA-CGM + APL + (MERCOSUL june2017)
    3. COSCO + CSCL
    4. HLL + UASC
    5. ONE: MOL + NYK + K Line
2. High rate of ULCC building (up to 22,000 Teu)
3. Freight rate low yet in recovery
4. Launch of 3 giant alliances (E-W trade)/ Transat/ Transpac/ Asia-Eu
    1. 2M : MSK + MSC + HMM
    2. The Ocean Alliance: CMA + COS + EVE
    3. THE ALLIANCE: HLL + ONE + YAN
5. Run for the slot cost

Challenges of the operations today

Nb of vessel	5,151
Nb of teu capacity	20,706,249
Average vessel size (teu)	4,020
NB of TEU carried	191,599,791
annual turnover in Billions of $	211
Number of final loading produced every year	456,678
Number of plan simulated/ year	1,598,374
number of moves/ year	663,326,540
Number of operation managed in the Carriers CommercialOperation System	22,413,541,189
Number of end users carriers+ agency+Onboard	72,944
Number of Vessel stowage managers	1,429
Number of cargo flows/ capacity managers	1,286

Evolution of the carrier fleets in FY 2016 and consolidation

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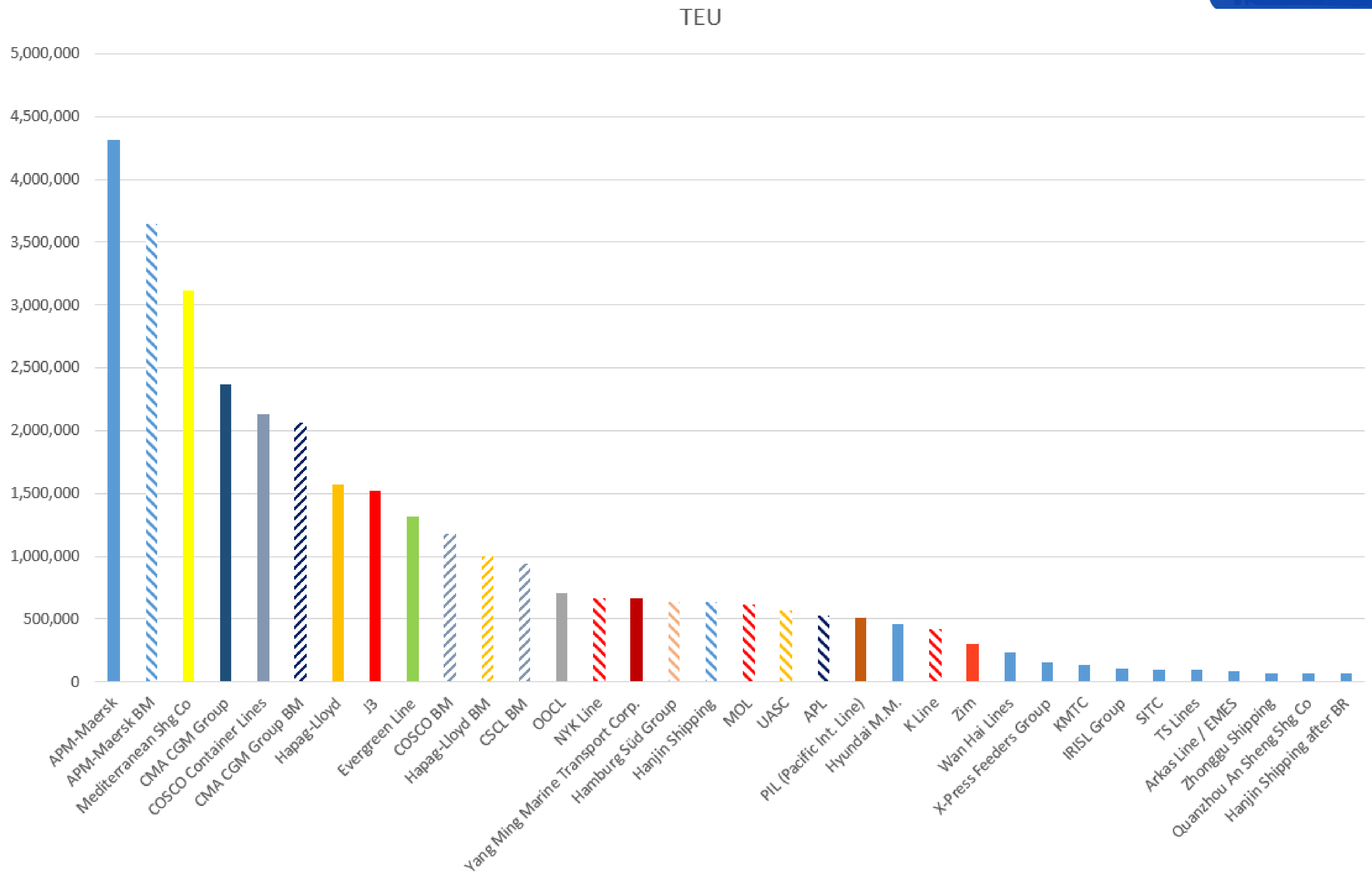

Evolution of the carrier fleets in FY 2016 and consolidation 2

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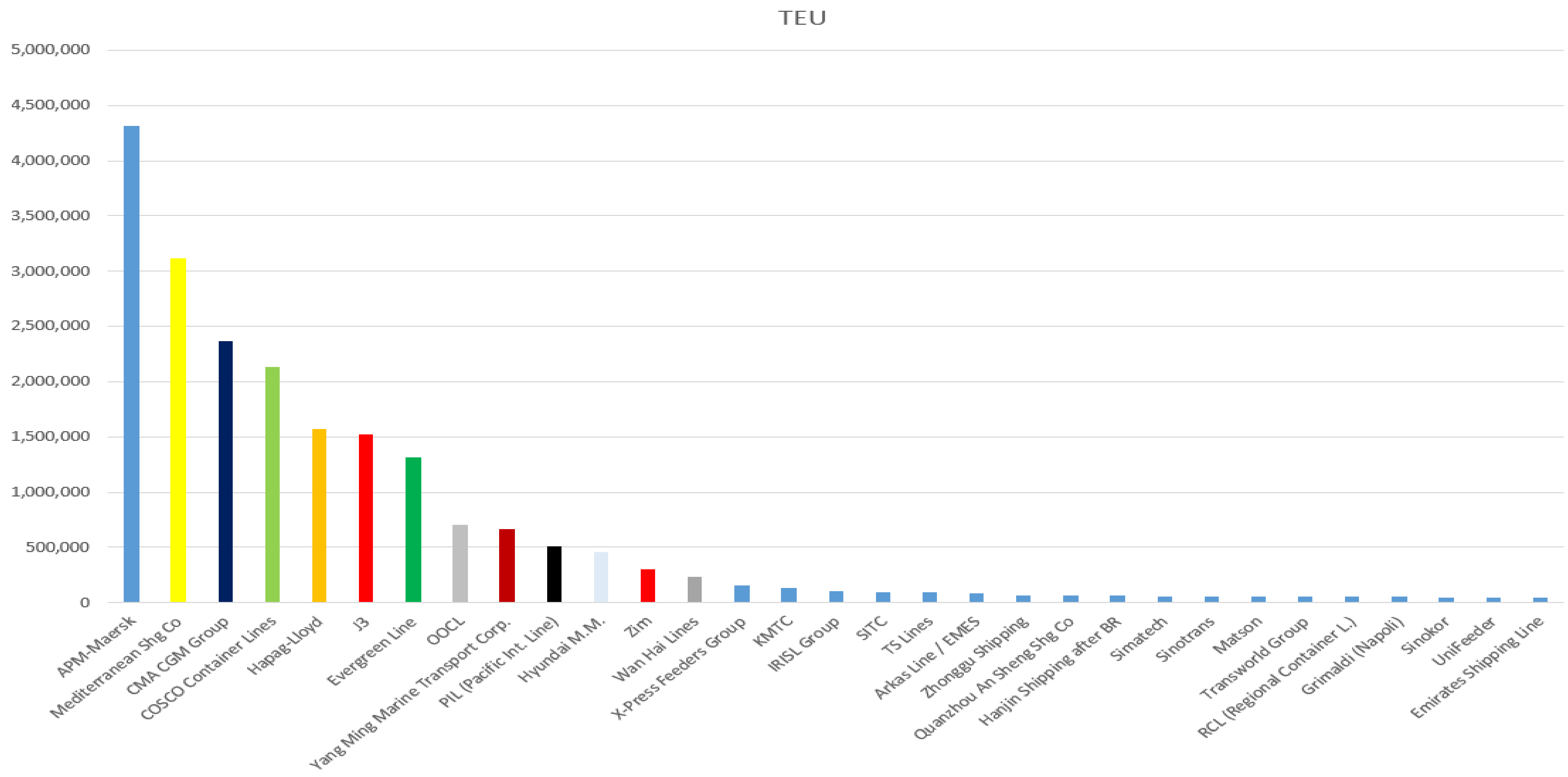

Market size by number of vessels controlled

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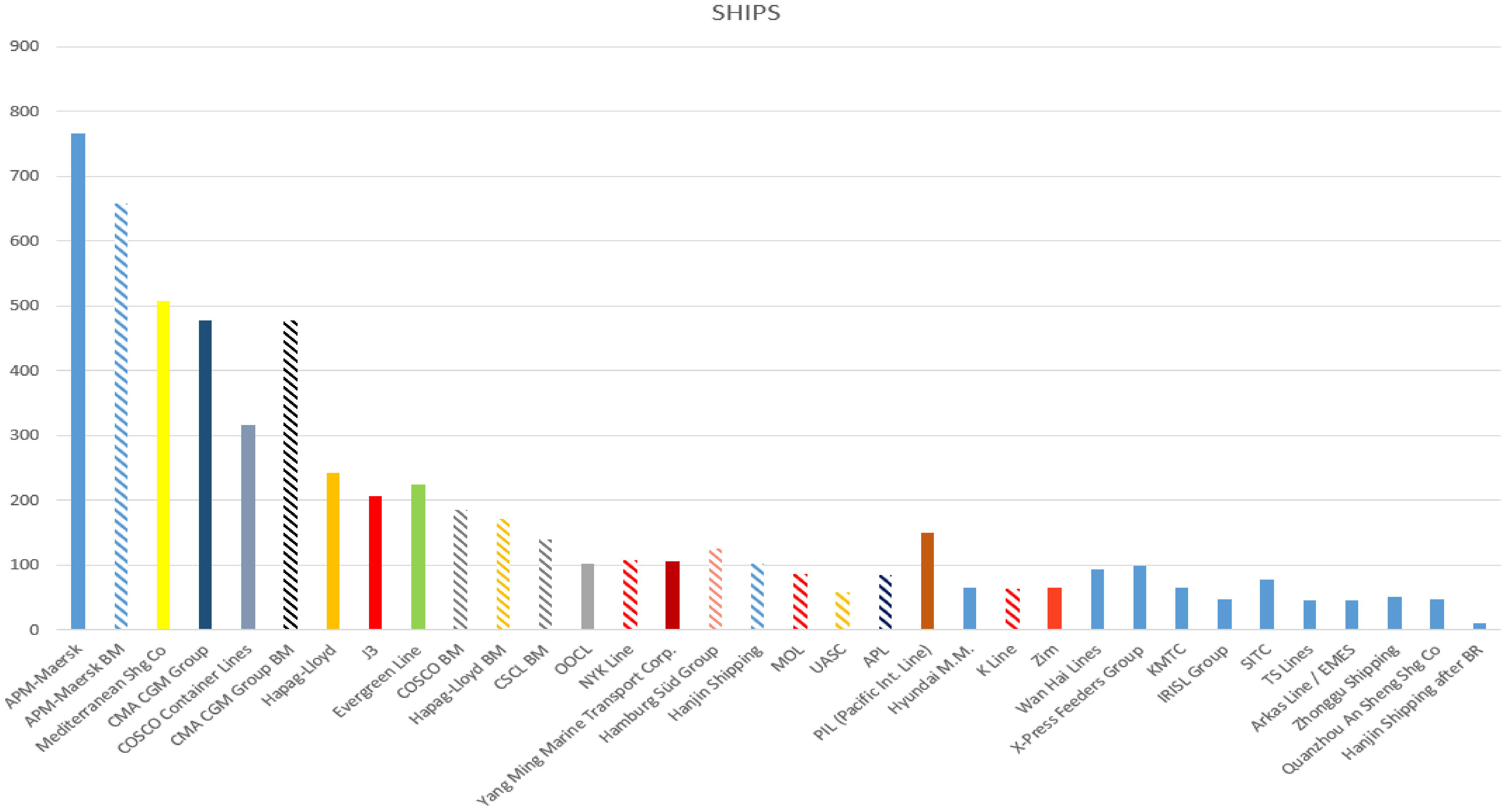

Market size by number of vessels controlled 2

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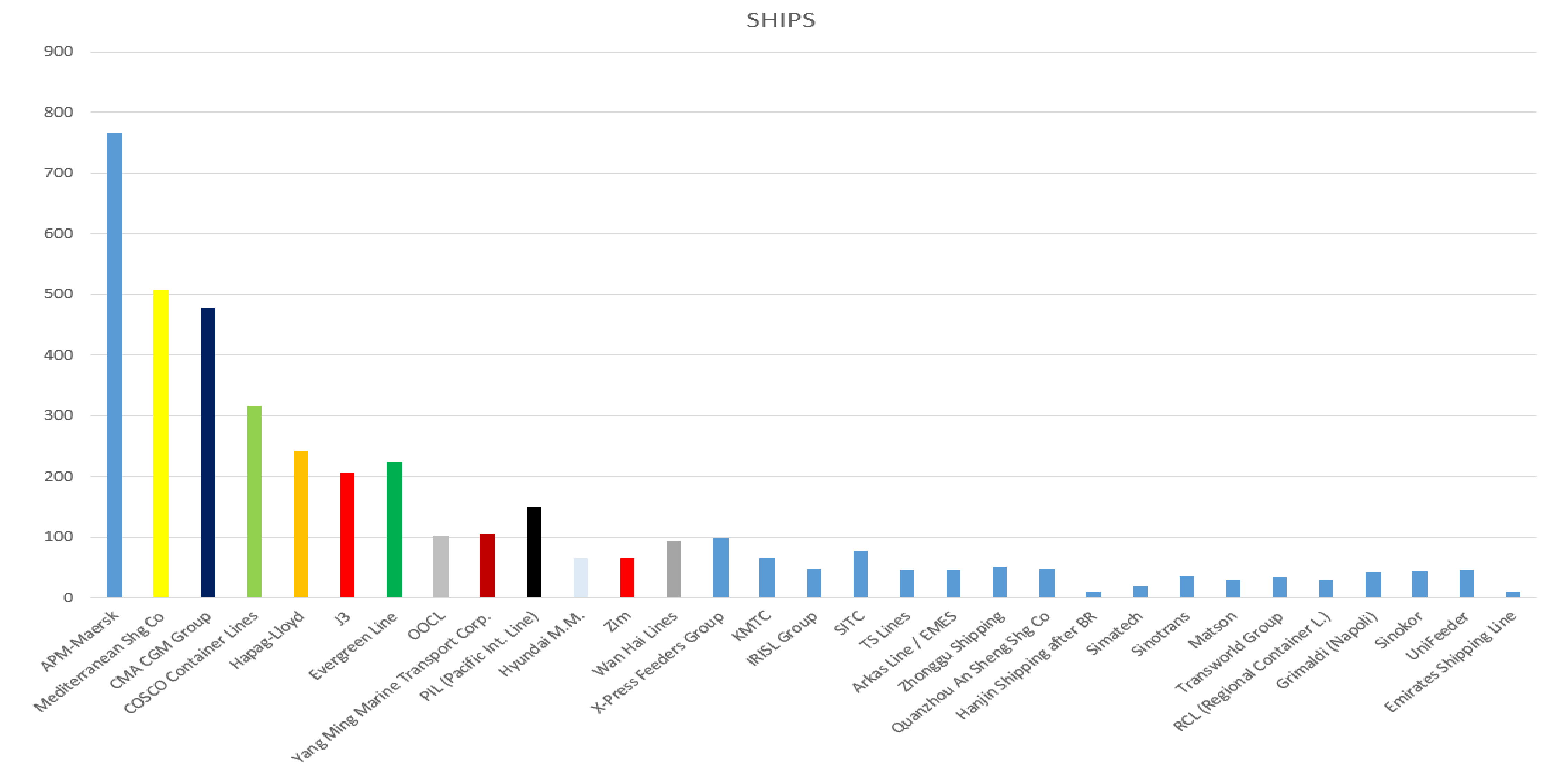

Market turn over and TEU carried

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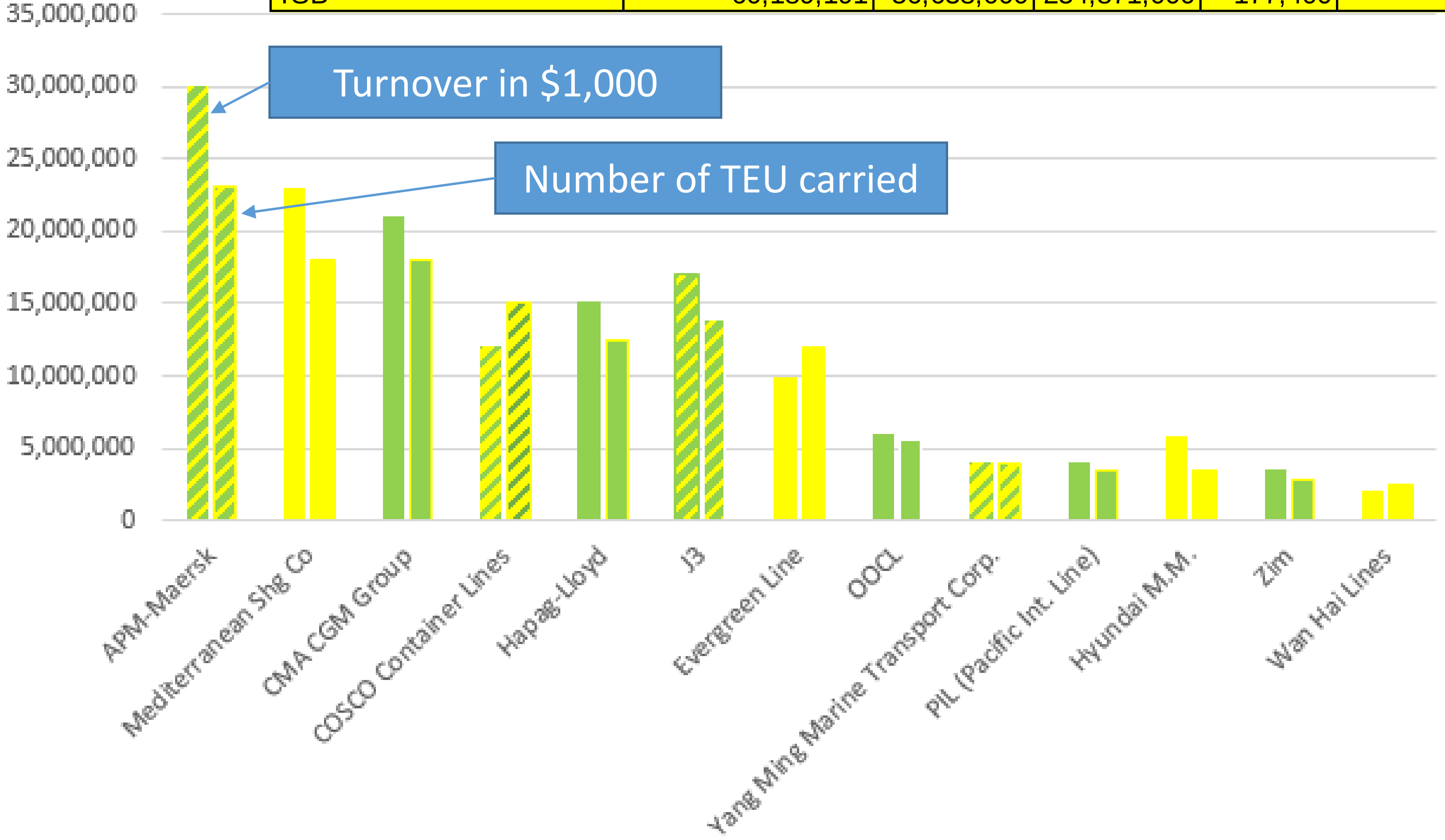
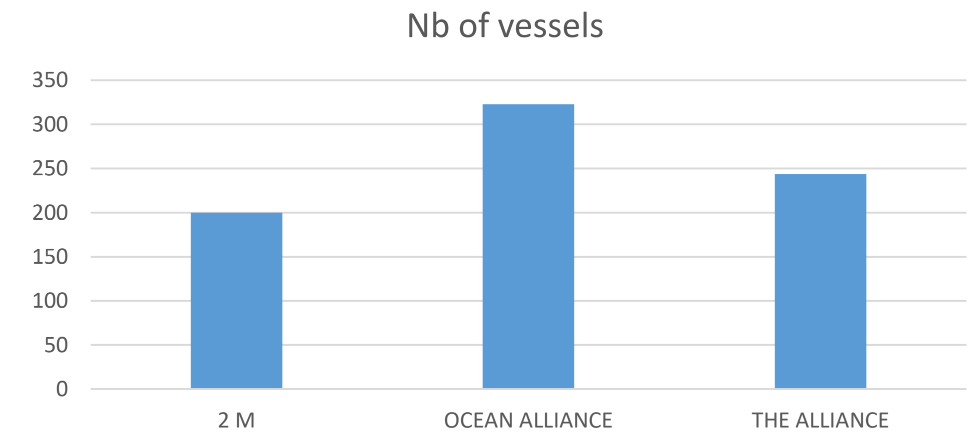
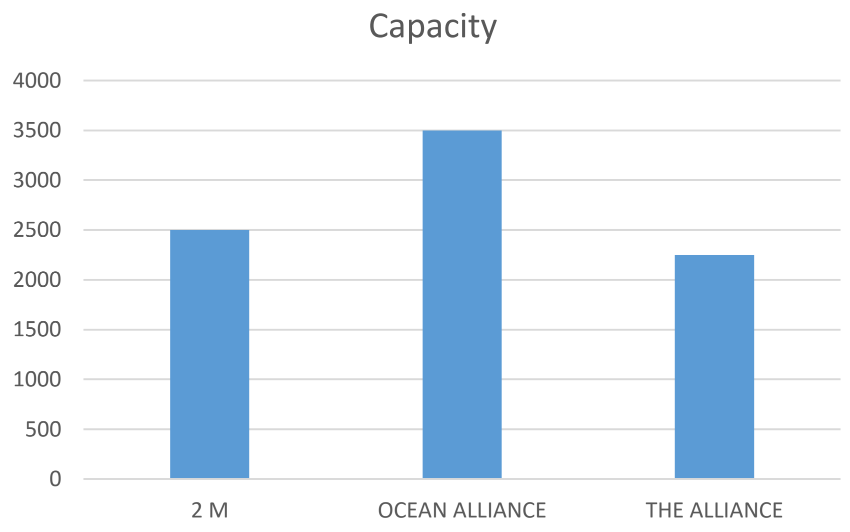
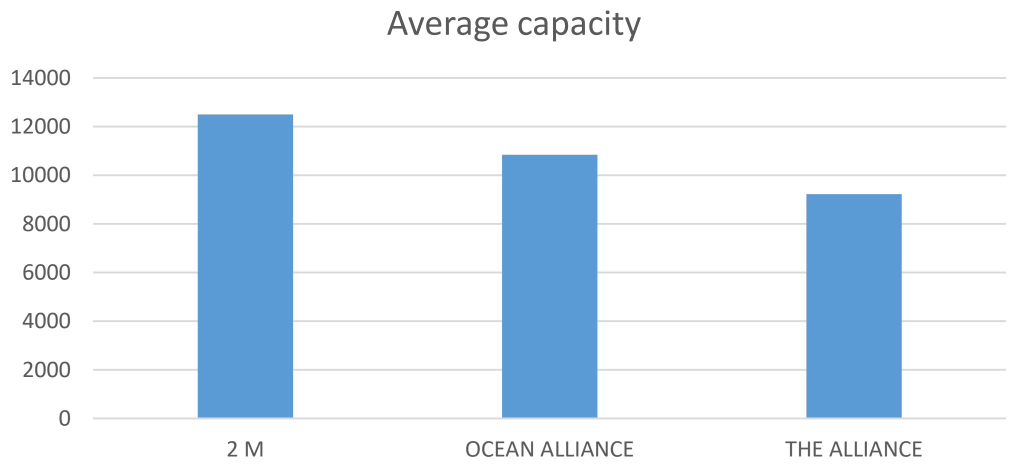
	Turn over managed in 000$	TEU carried	Moves	Bayplans	Number of ship managers	cargo flow	agent	c/o/ capt
Navis group	93,120,000	77,711,000	388,555,000	239,800	697	377	9,140	5,503
TSB	60,189,191	56,638,000	254,871,000	177,400	591	287	9,720	3,761



Alliance


Nb of vessels
350
300
250
200
150
100
50
0
2 M
OCEAN ALLIANCE
THE ALLIANCE


Capacity
4000
3500
3000
2500
2000
1500
1000
500
0
2 M
OCEAN ALLIANCE
THE ALLIANCE


Average capacity
14000
12000
10000
8000
6000
4000
2000
0
2 M
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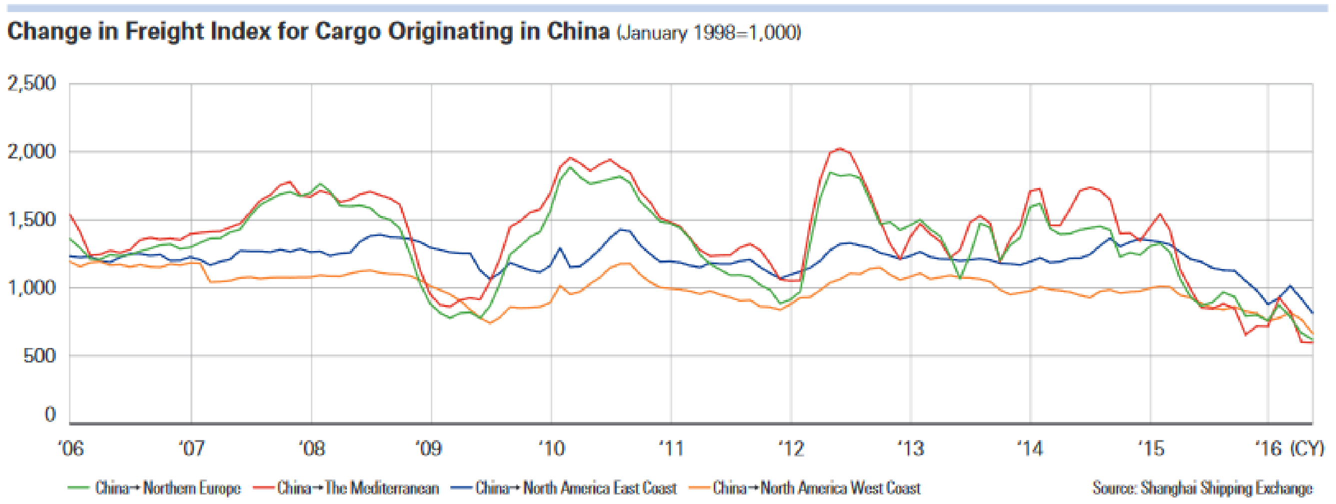
THE ALLIANCE


Change in Freight Index for Cargo Originating in China (January 1998=1,000)
2,500
2,000
1,500
1,000
500
0
'06
'07
'08
'09
'10
'11
'12
'13
'14
'15
'16 (CY)
China→ Northern Europe
China→ The Mediterranean
China→ North America East Coast
China→ North America West Coast
Source: Shanghai Shipping Exchange

Challenges of the operations today

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