

## Shipping, Trade & Economic Outlook

A Worldwide Overview on Container Logistics Market

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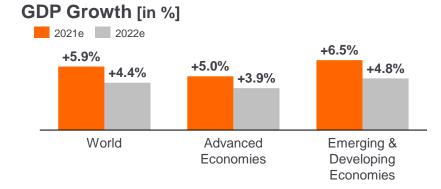
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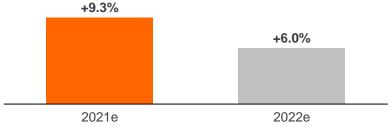
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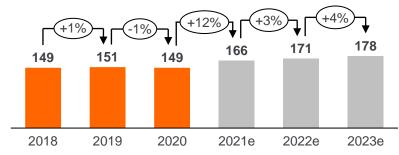
## **Container Shipping Remains a Growth Industry**



### World Trade Growth [in %]



#### Global Container Trade [in mTEU]



#### Container Trade Growth by Route [in %]

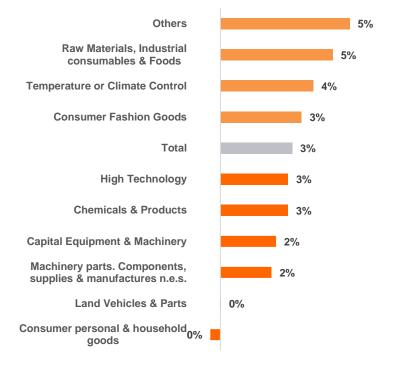




## **Worldwide Commodity Split and Growth**

High Consumer Others 0% Fashion Technology Capital 2% Goods 3% Equipment & Machinery 4% Temperature or Climate Control 6% Land Vehicles & Parts 8% **Chemicals &** Products 8% Machinery parts. Components, supplies & **Raw Materials. Industrial** manufactures n.e.s. consumables & Foods 8% **Consumer personal &** 46% household goods 15%

#### Growth Rate 2022e

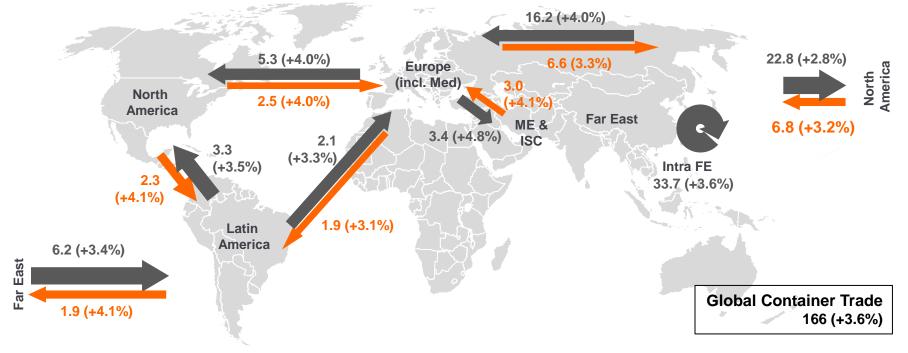


**Commodity Shares 2021e** 



## Stable long-term growth along all major trades

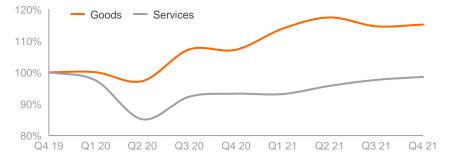






# The shift in demand has outlined the vulnerability of global supply chains

#### **US CONSUMPTION EXPENDITURES**



## PRESSURE ON SUPPLY CHAINS

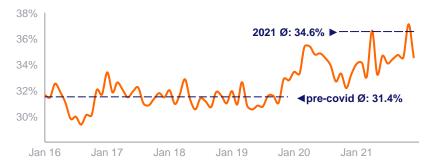
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COVID-19 pandemic has **shifted consumer behavior** from services to more consumer goods mainly produced in Asia



High demand and COVID related labor shortages led to **supply chain disruptions** 





The **service quality** in the entire industry was under heavy pressure



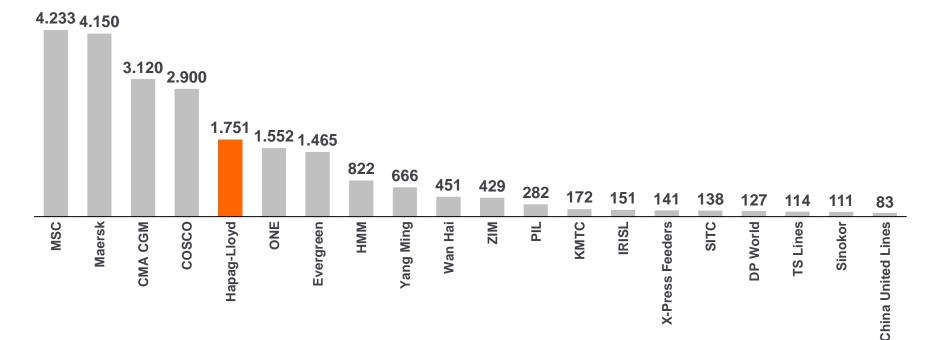
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**Operational costs** went up clearly due to rising charter rates, longer storage durations and lack of hinterland transport capacity



## Hapag-Lloyd – a Leading Global Operator

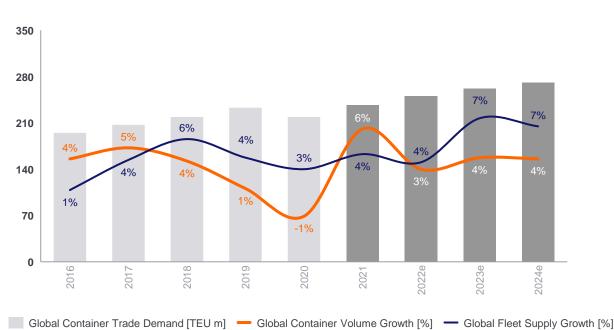
#### Current Fleet of Top 20 [in kTEU]



# Demand has rebounded strongly since the end of 2020 and supply is expected to converge in the coming years

#### SUPPLY/DEMAND BALANCE

[TEU m, %]





Demand is expected to remain robust





Capacity influx will increase from 2023 onwards to cater for high demand





Sustainability efforts might accelerate scrapping

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Demand/supply fundamentals to become more balanced in the years to come

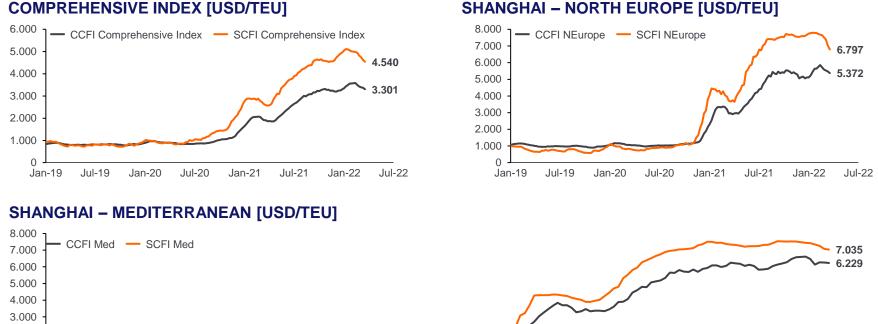
Note: Global Container Trade Growth: CTS data until 2021; average calculation based on Alphaliner, Clarksons & Seabury for 2022e onwards.

Source: Alphaliner (January 2022), Clarksons (March 2022), CTS (February 2022), Drewry (various issues), Seabury (December 2021)



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## Freight rate development



#### SHANGHAI – NORTH EUROPE [USD/TEU]

Jan-19 Mar-19 May-19 Jul-19 Sep-19 Nov-19 Jan-20 Mar-20 May-20 Jul-20 Sep-20 Nov-20 Jan-21 Mar-21 May-21 Jul-21 Sep-21 Nov-21 Jan-22 Mar-22 May-22





## Thank you for your attention!

