Trends

1. Concentration
2. Vertical integration
3. Price
4. Service quality
1. Concentration (global carrier capacity)

Capacity market shares global carriers (1998-2018)

Source: Alphaliner
1. Concentration (ship capacity per trade lane)

Far East-Europe and Europe- North America (February 2019)

Source: Alphaliner
1. Concentration (alliances)

Share non-alliances in East-West trades (2012-2018)

Source: Sea Intelligence
1. Concentration (alliances)

Market shares on Asia-North Europe trade lane, per quarter (2012-2018)

Source: Sea Intelligence
1. Concentration (alliances)

Market shares on North Europe- North America East Coast trade lane (2012-2018)

Source: Sea Intelligence
1. Concentration (ship size)
2. Vertical integration (feedering)

Share of common and dedicated operators in European regions

Source: Dynamar
2. Vertical integration (terminals)


- Carrier-controlled operators
- Independent global terminal operators
- Other

Source: Drewry
3. Price

Source: Sea Intelligence
4. Service quality (direct liner connectivity)

Share of countries that can be reached by German exporters with zero transhipment 2006-2016

Source: UNCTAD
4. Service quality (direct liner connectivity)

Country share that can be reached by Slovenian exporters with zero transhipment 2006-2016

Source: UNCTAD
4. Service quality (port-to-port connections)

Distinct port pairs on Asia-North Europe services 2012-2018

Source: Sea Intelligence
4. Service quality (port-to-port connections)

Distinct port pairs on Asia-Med services 2012-2018

Source: Sea Intelligence
4. Service quality (service frequency)

Weekly service frequency on Asia-Europe trade lanes 2012-2018

Source: Sea Intelligence
4. Service quality (service frequency)

Weekly service frequency on Transatlantic trade lanes 2012-2018

Source: Sea Intelligence
4. Service quality (schedule reliability)

Schedule reliability on European trade lanes (2012-2018)

Source: Sea Intelligence
4. Service quality (blank sailings)

Number of blanked sailings on Asia-Europe trade lanes (2012-2018)

Source: Sea Intelligence
4. Service quality (blank sailings)

Capacity withdrawn because of blanked sailings on Asia-Europe trade lanes (2012-2018)

Source: Sea Intelligence
Impact on transport stakeholders

• What are the most relevant developments in container shipping since the last Review of the Consortia Block Exemption Regulation?

• What are the most important concerns now and for the future for your organisation that the Review should take into account?