

Trends in Container Shipping

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Stakeholder Meeting on Container Shipping

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OECD Conference Centre

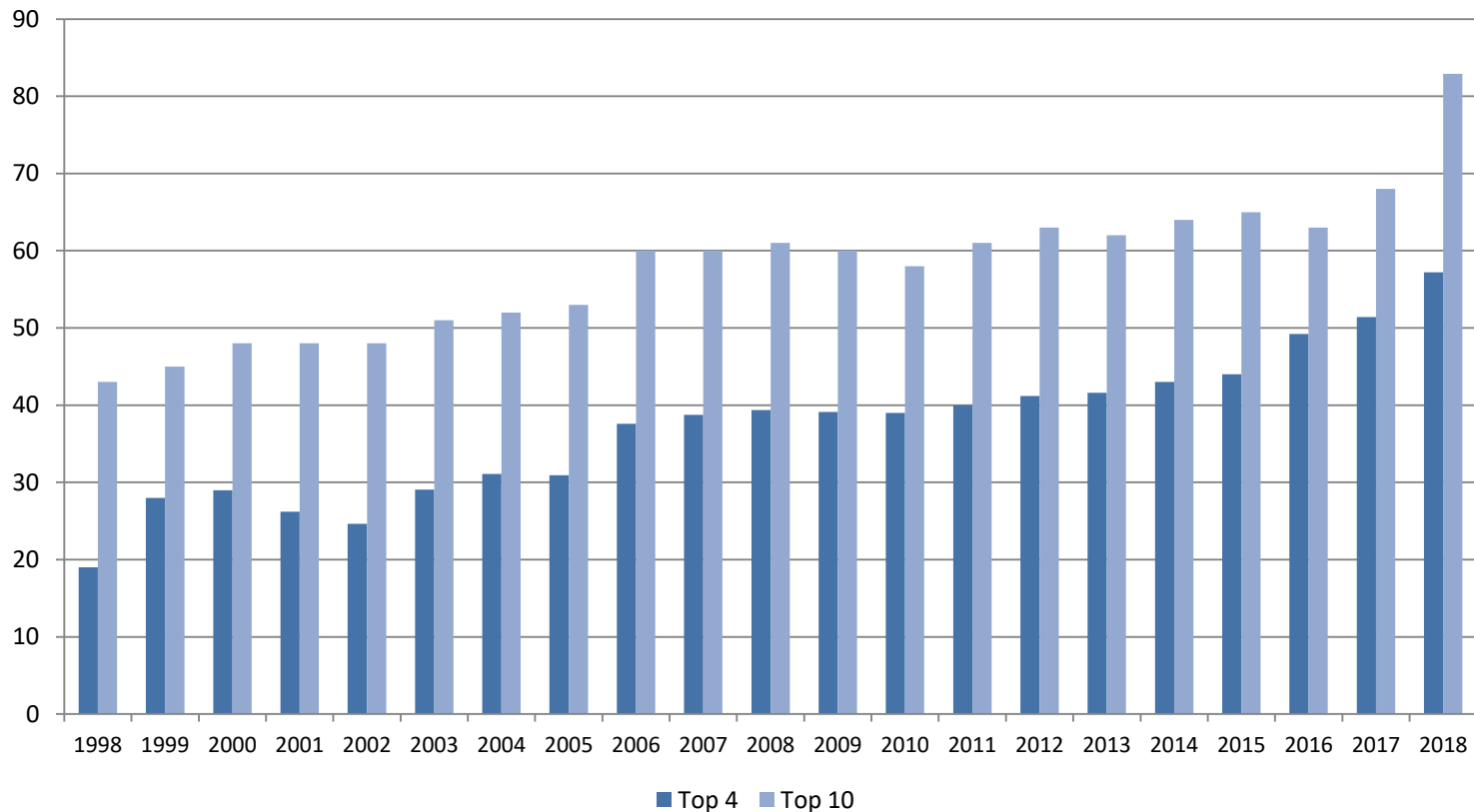
Trends

1. Concentration
2. Vertical integration
3. Price
4. Service quality



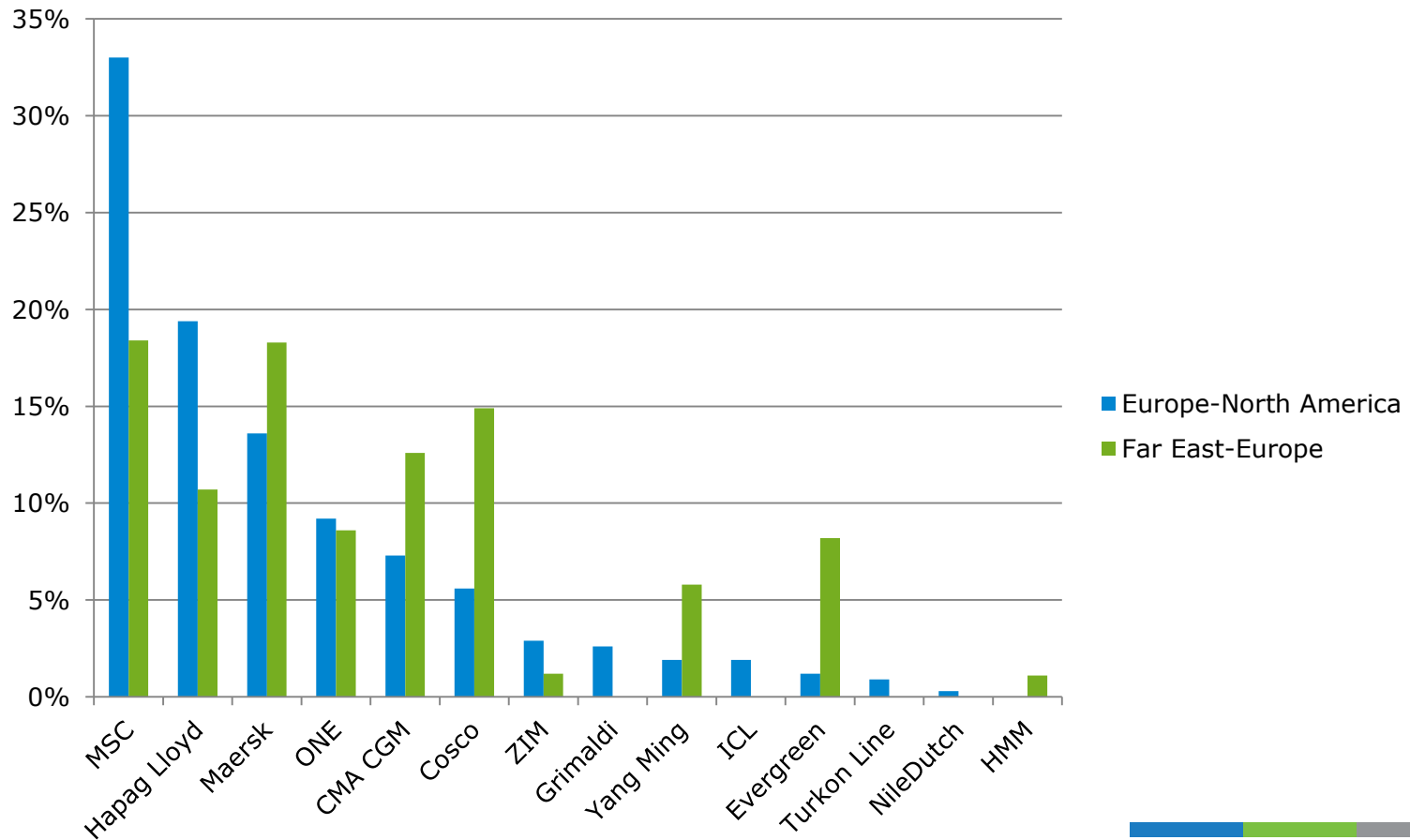
1. Concentration (global carrier capacity)

Capacity market shares global carriers (1998-2018)



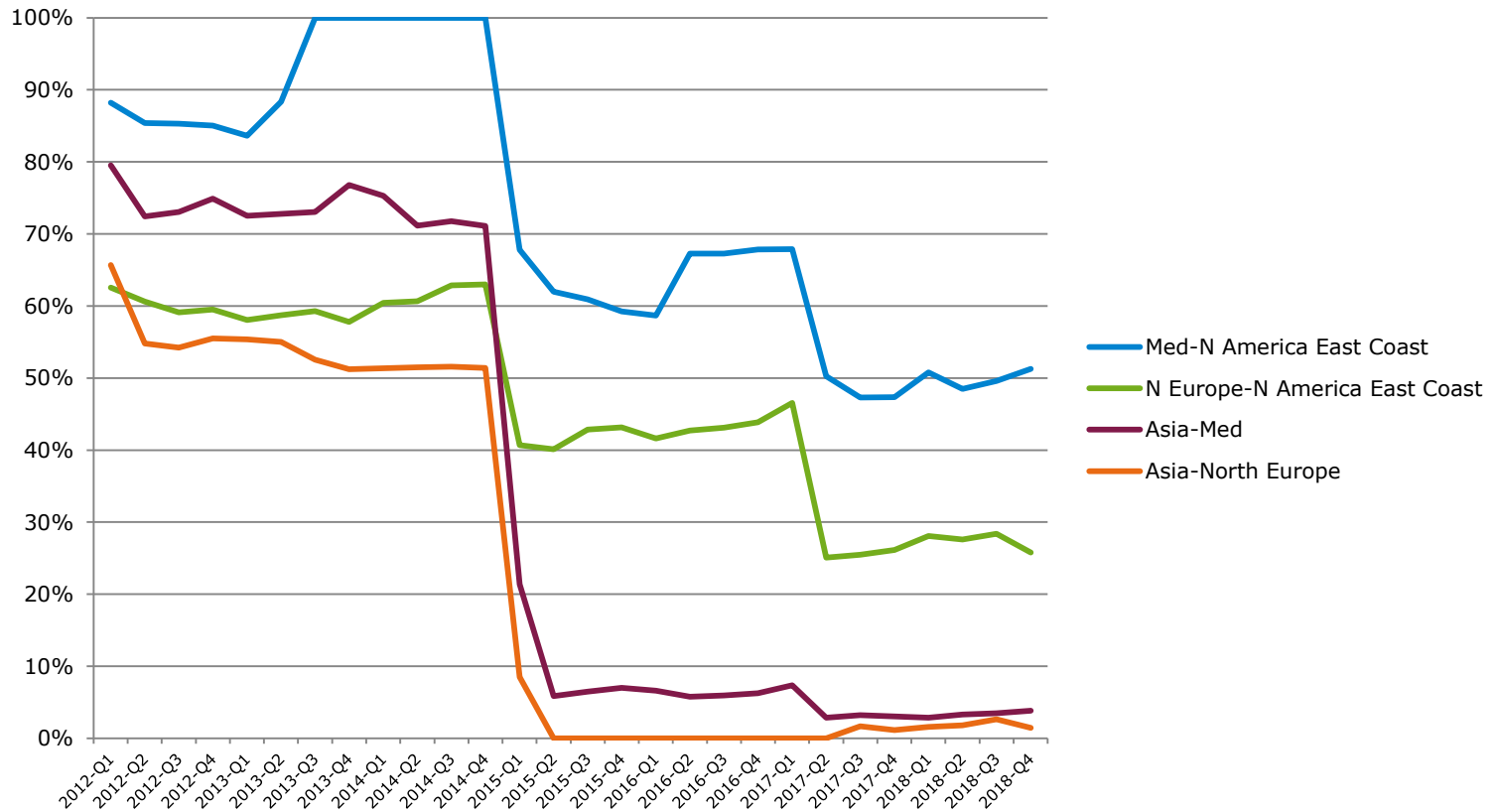
1. Concentration (ship capacity per trade lane)

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



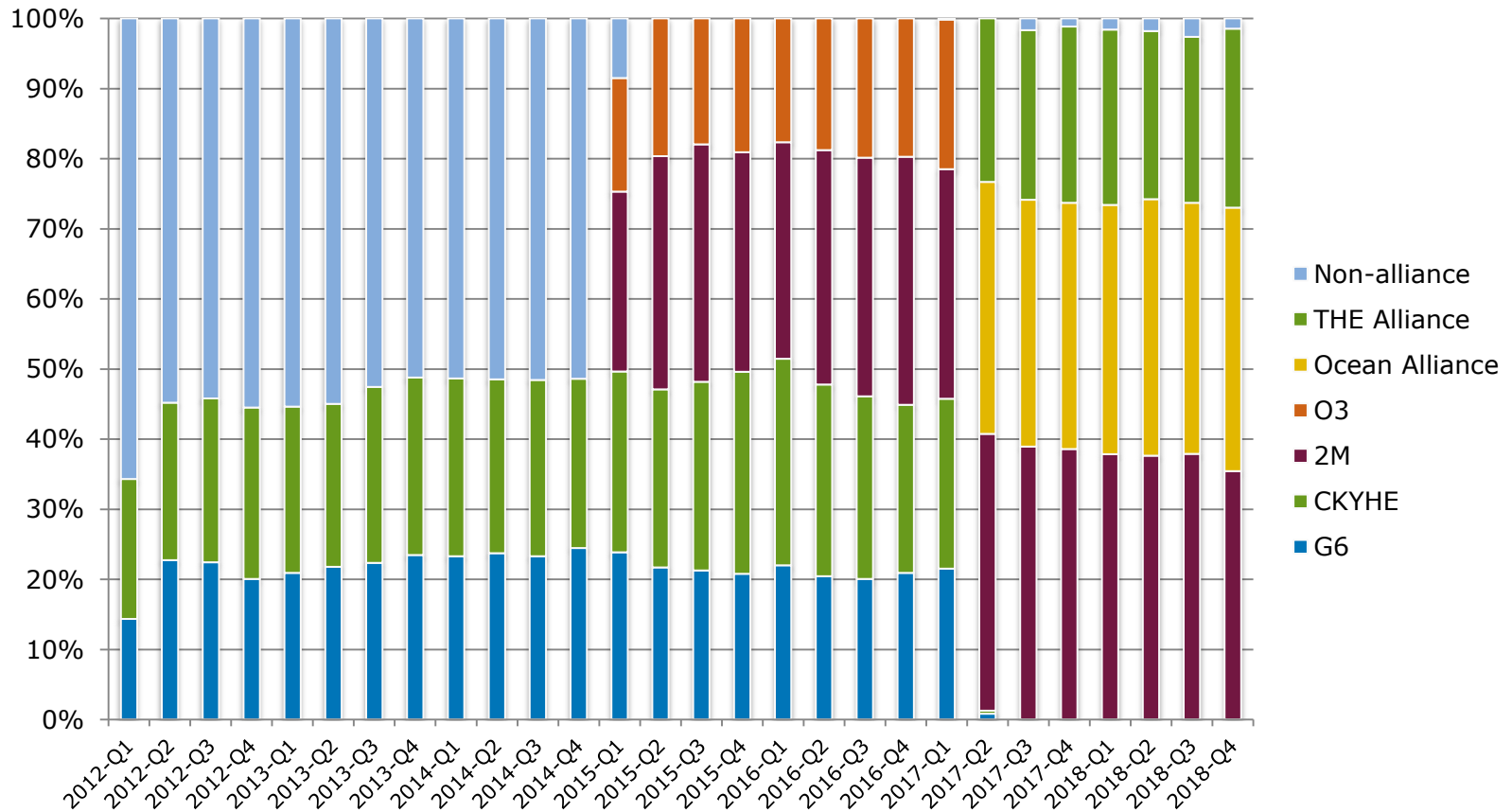
1. Concentration (alliances)

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



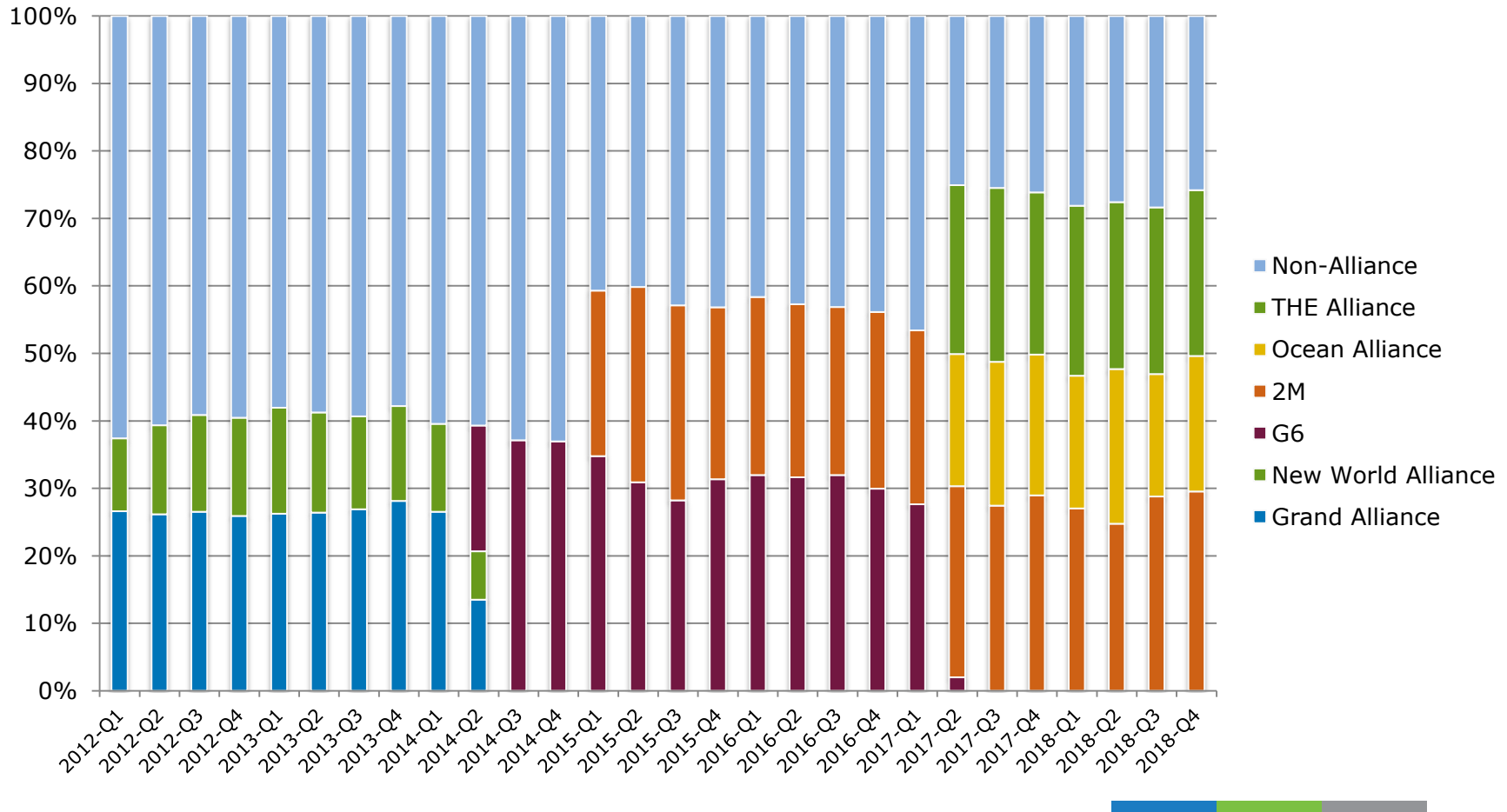
1. Concentration (alliances)

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

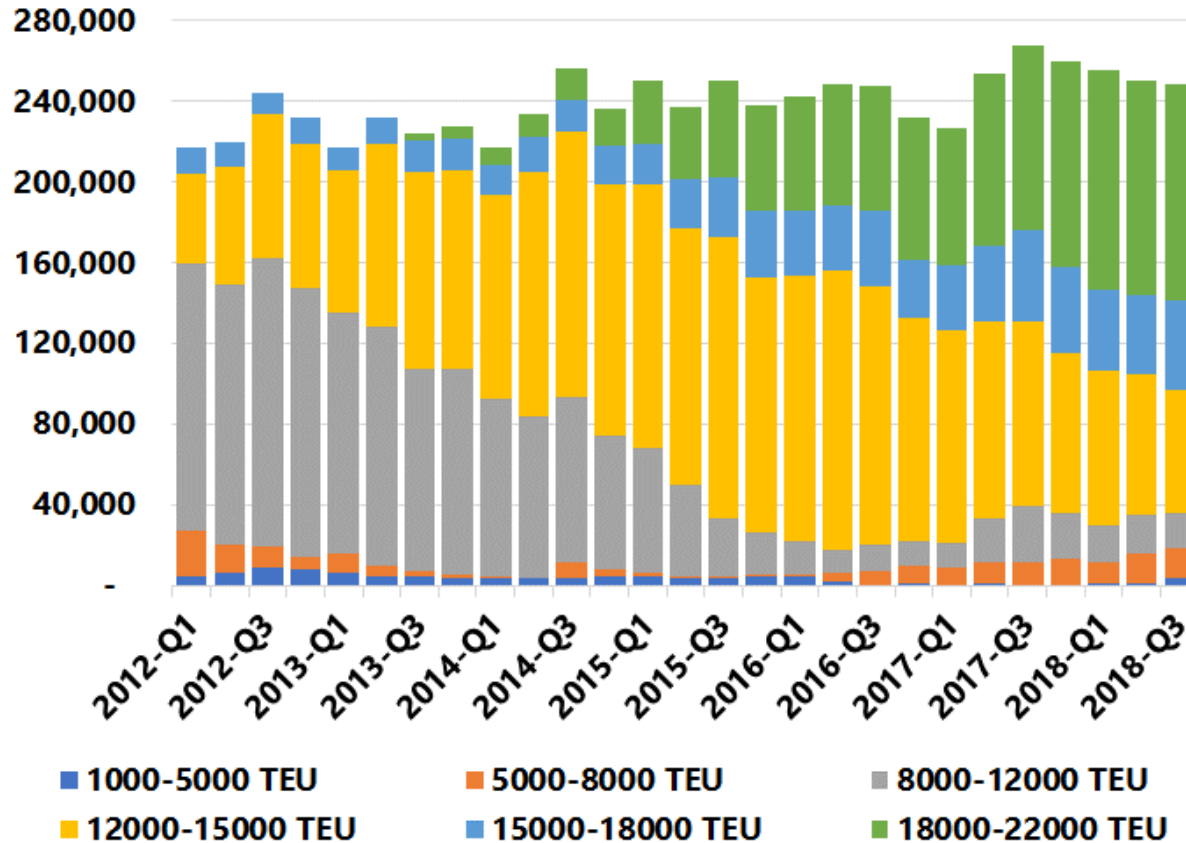


1. Concentration (alliances)

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

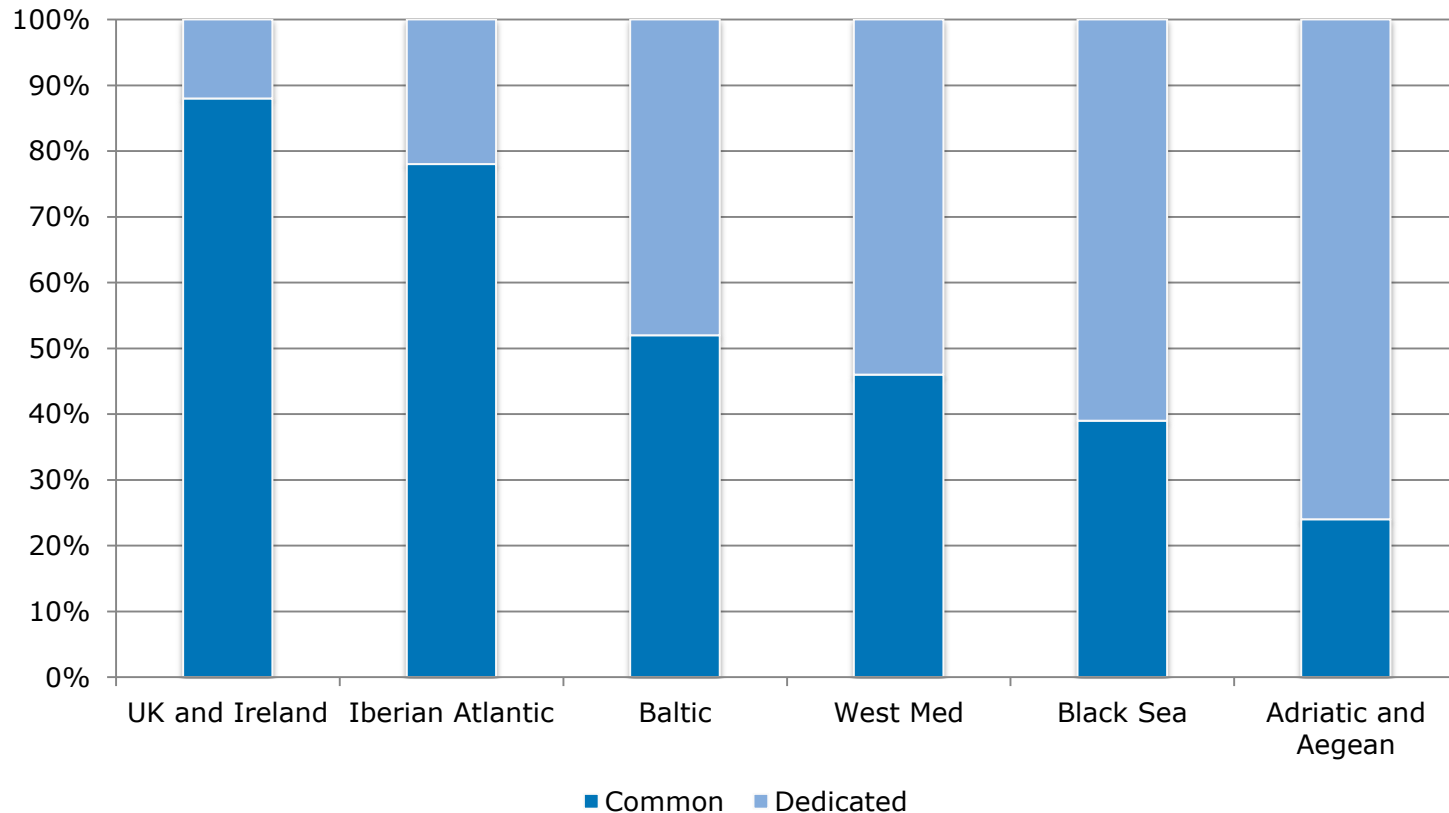


1. Concentration (ship size)



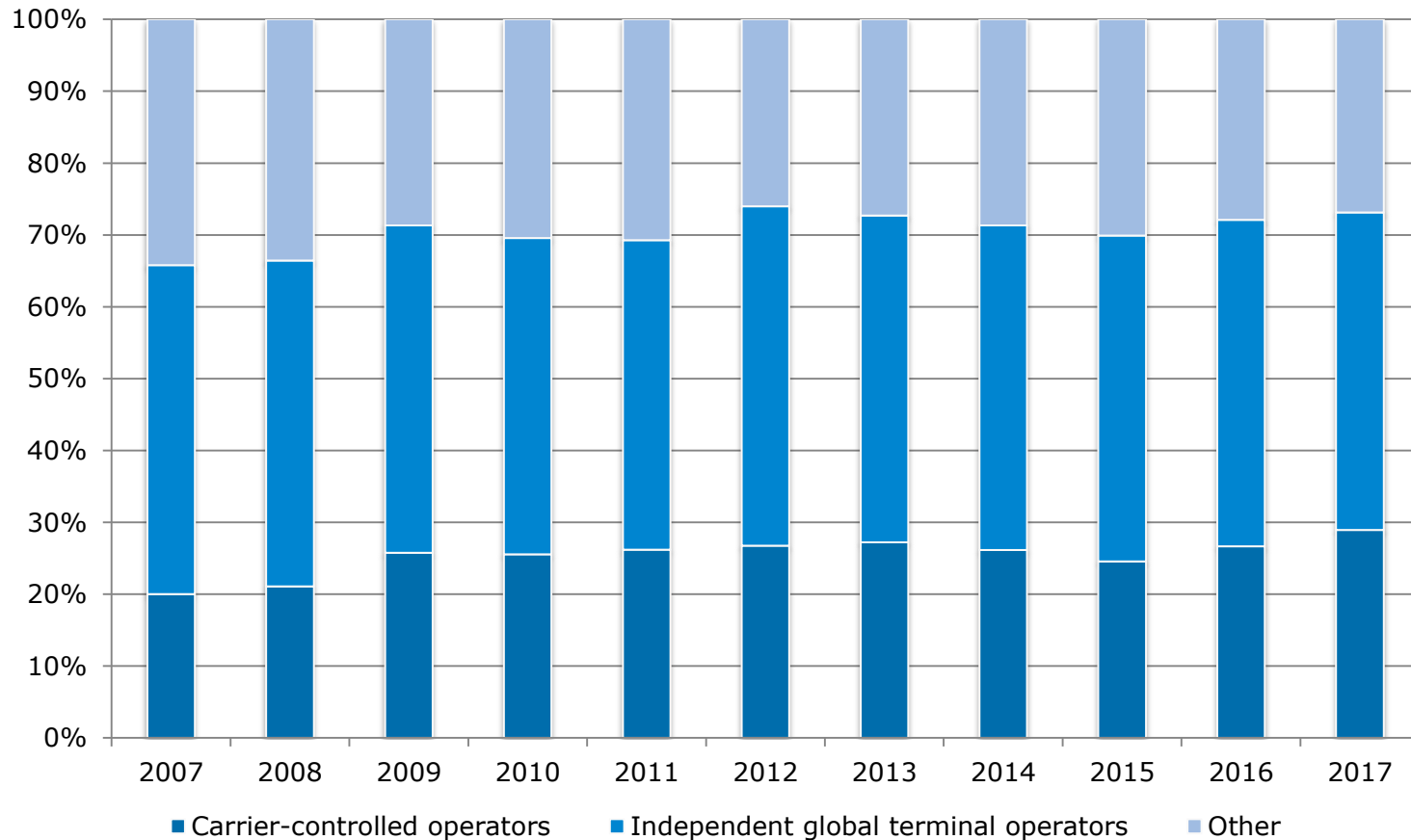
2. Vertical integration (feederling)

Share of common and dedicated operators in European regions

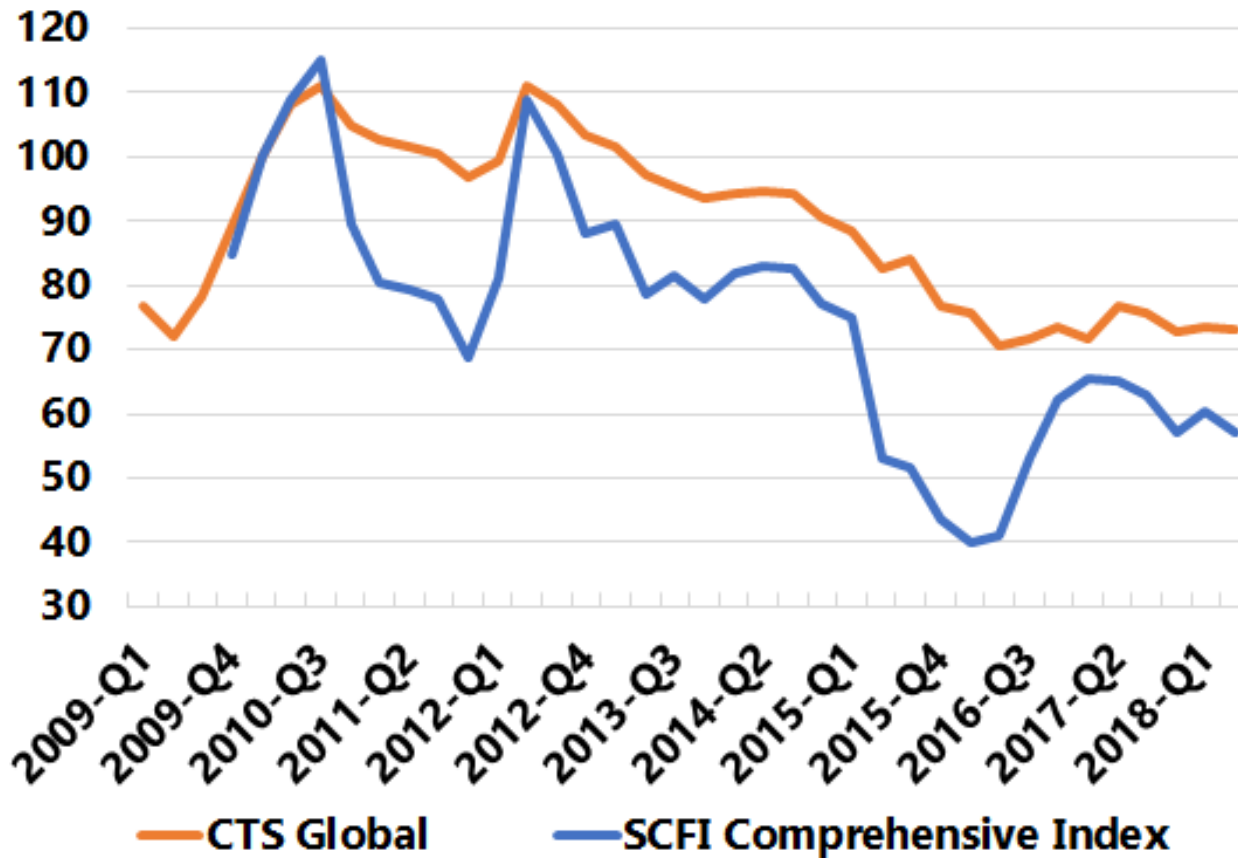


2. Vertical integration (terminals)

Types of terminal operators in Europe (2007-2017)

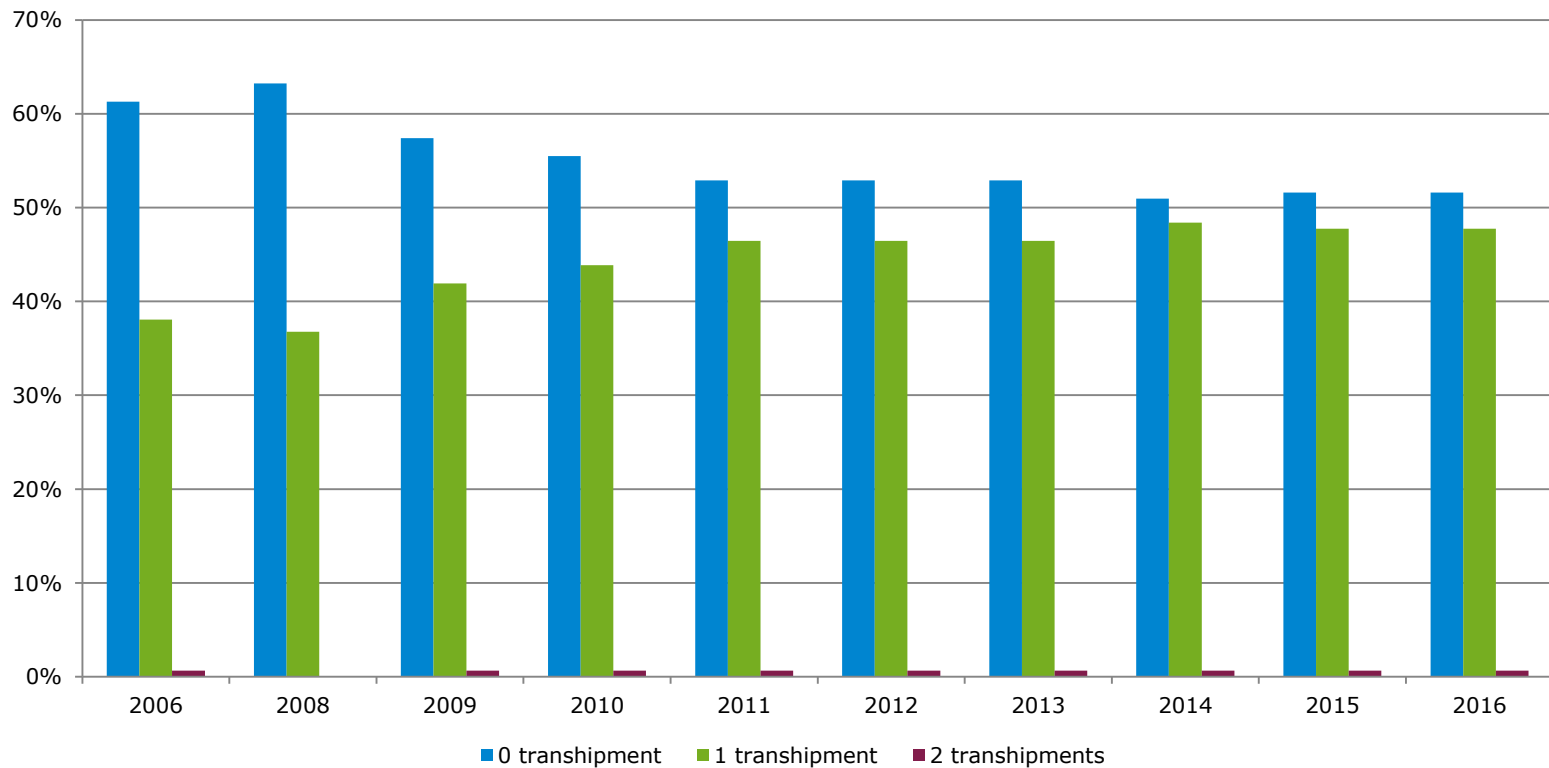


3. Price



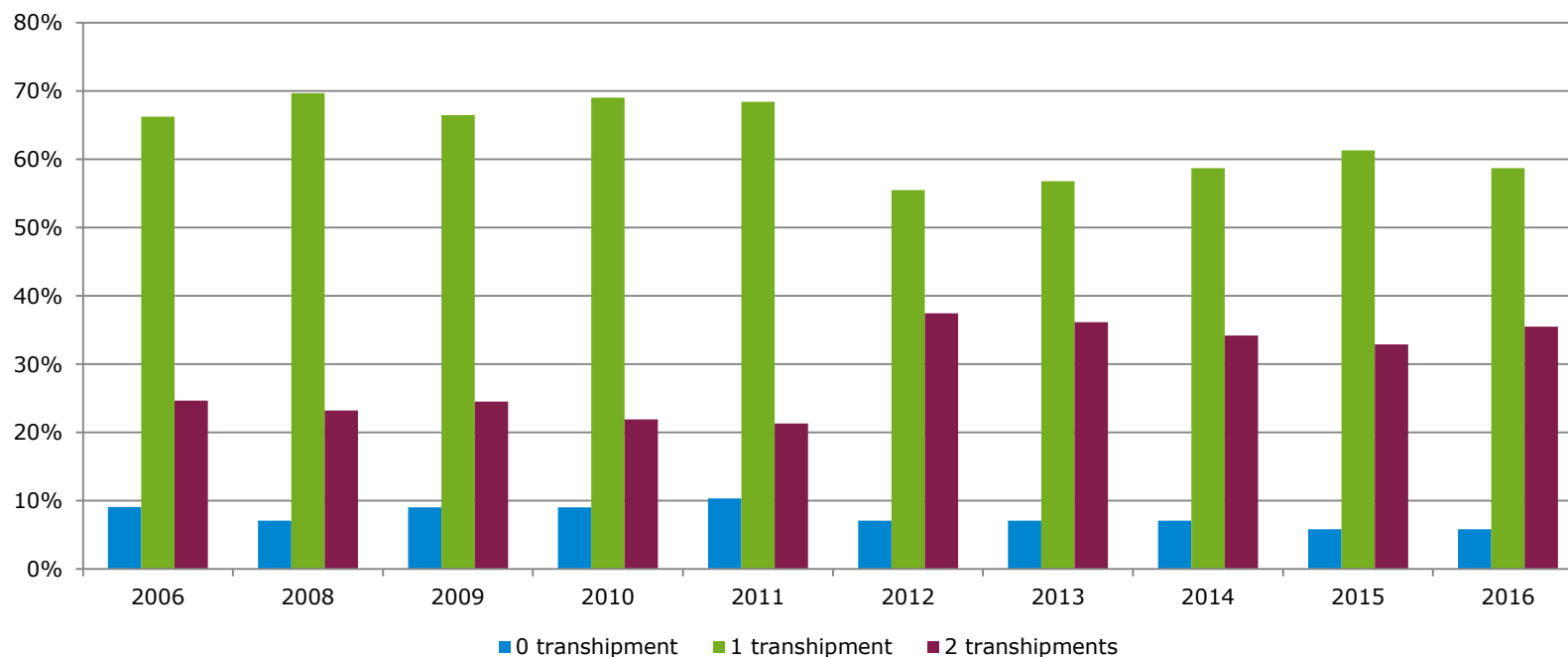
4. Service quality (direct liner connectivity)

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



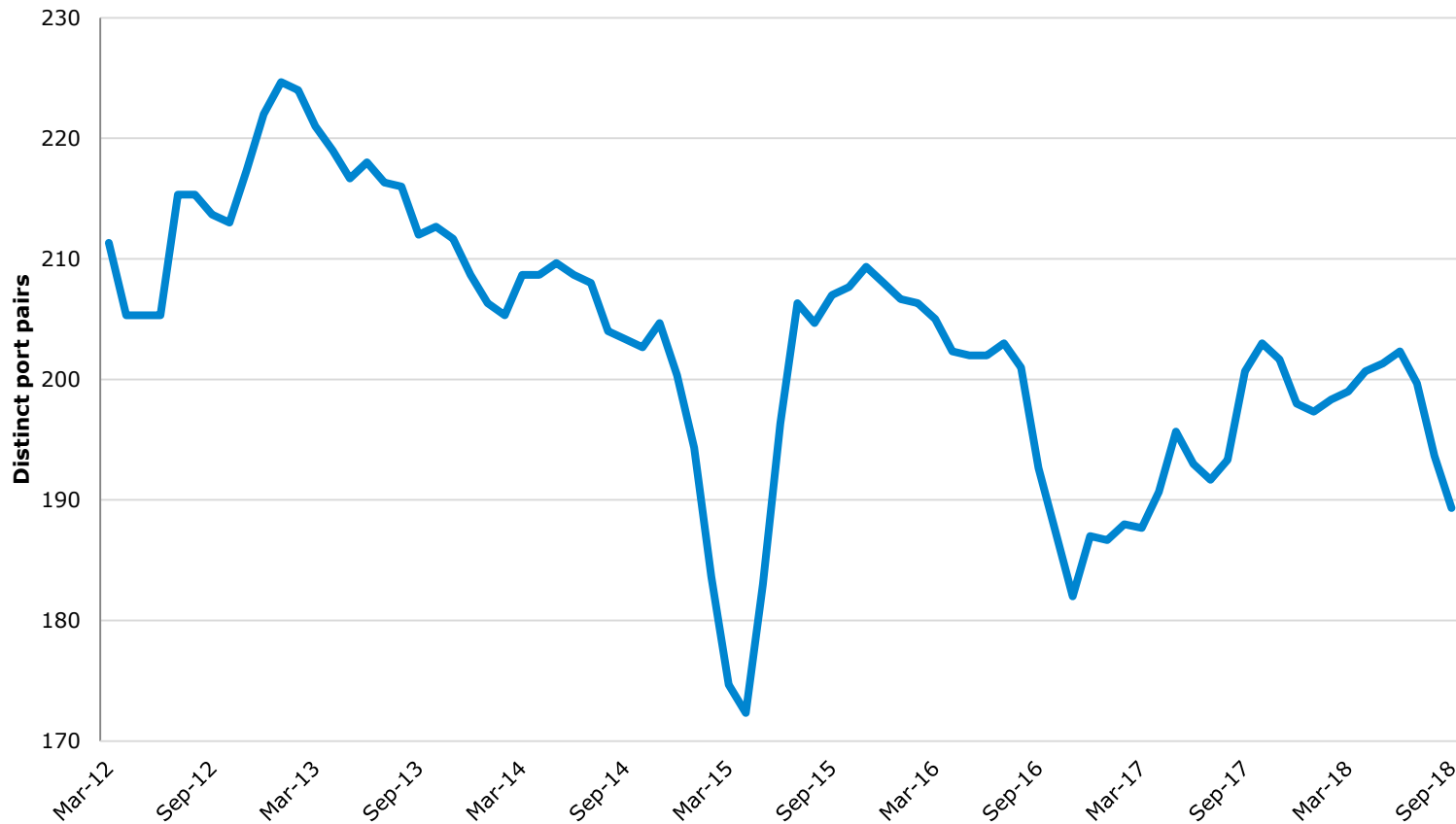
4. Service quality (direct liner connectivity)

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



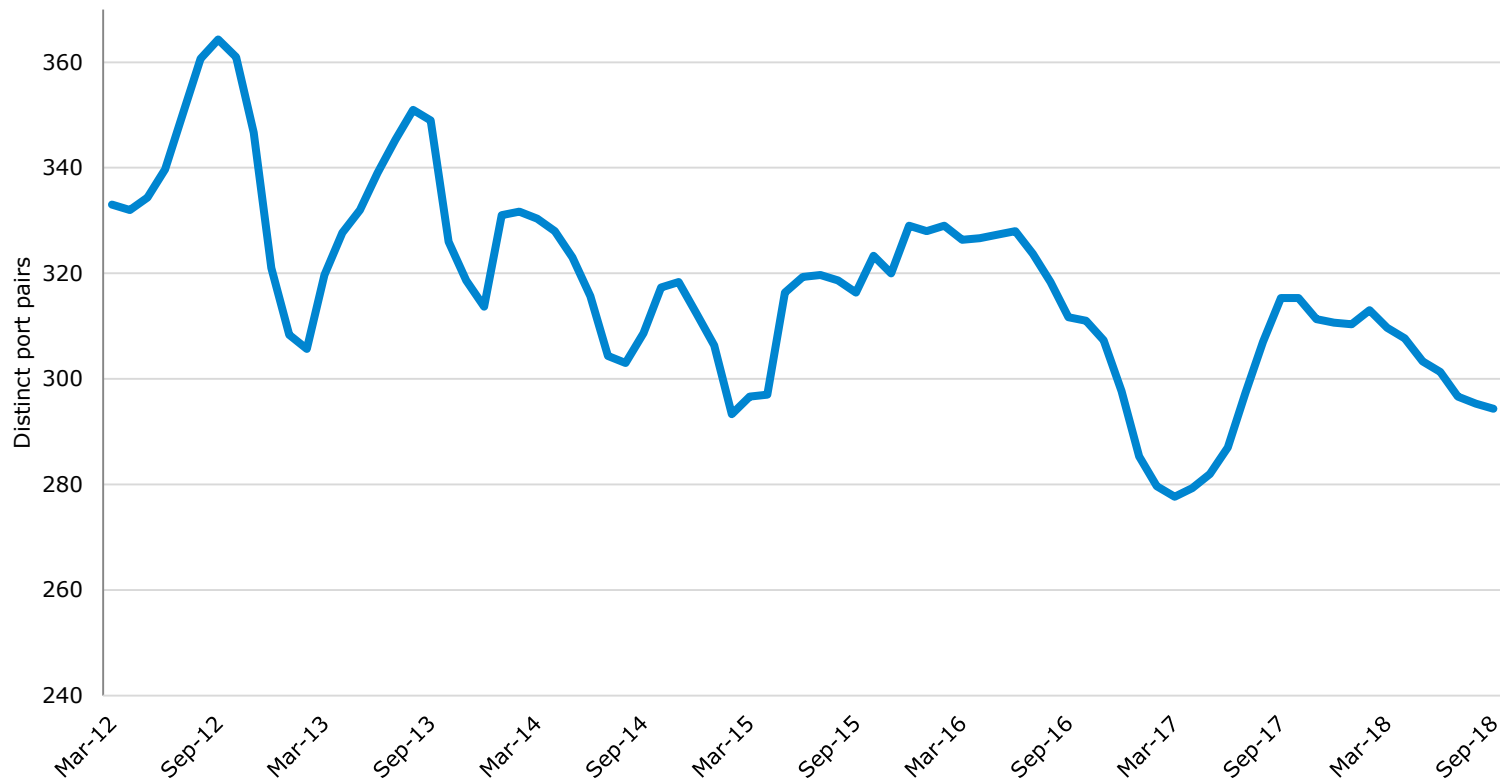
4. Service quality (port-to-port connections)

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



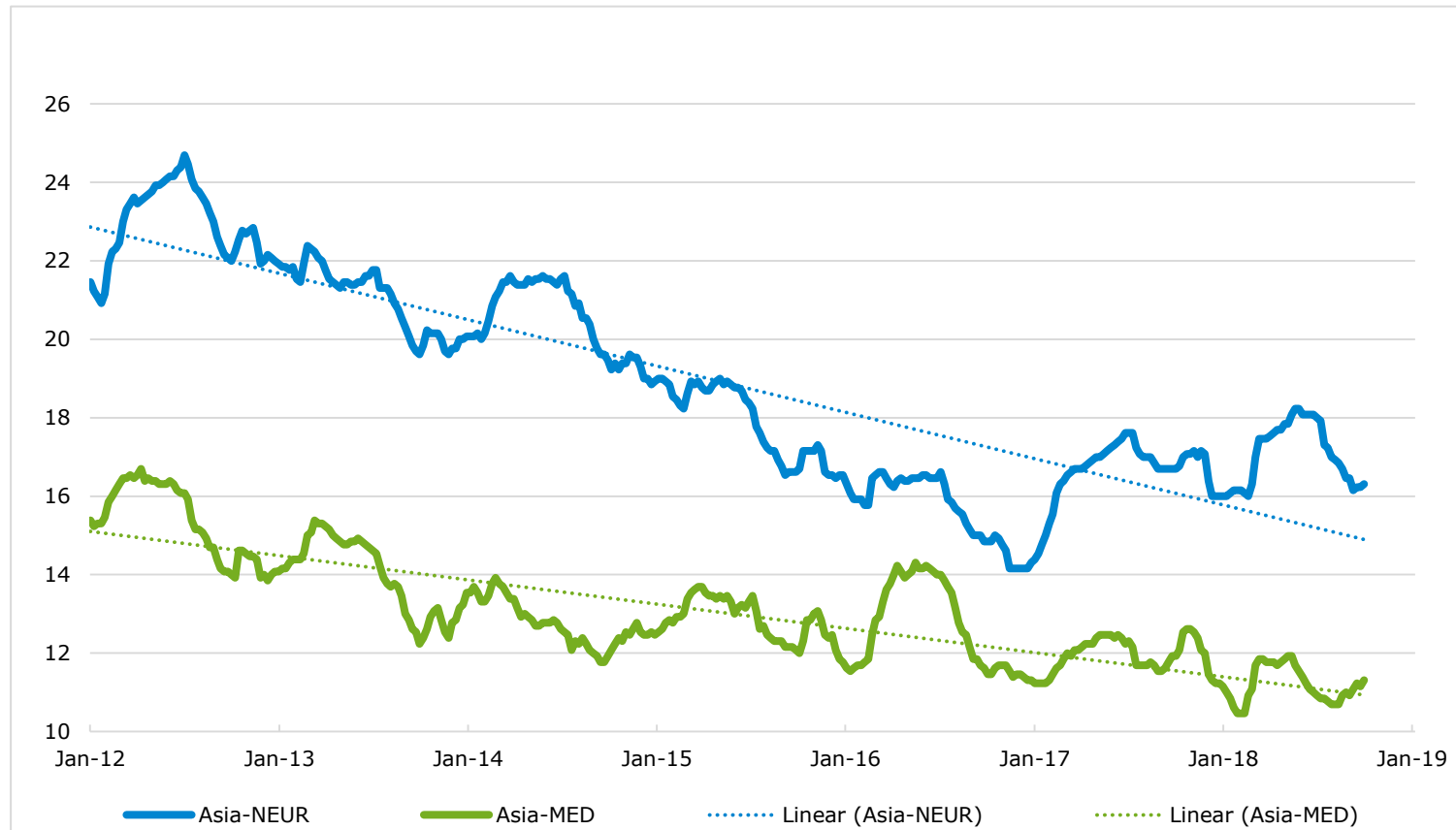
4. Service quality (port-to-port connections)

Distinct port pairs on Asia-Med services 2012-2018



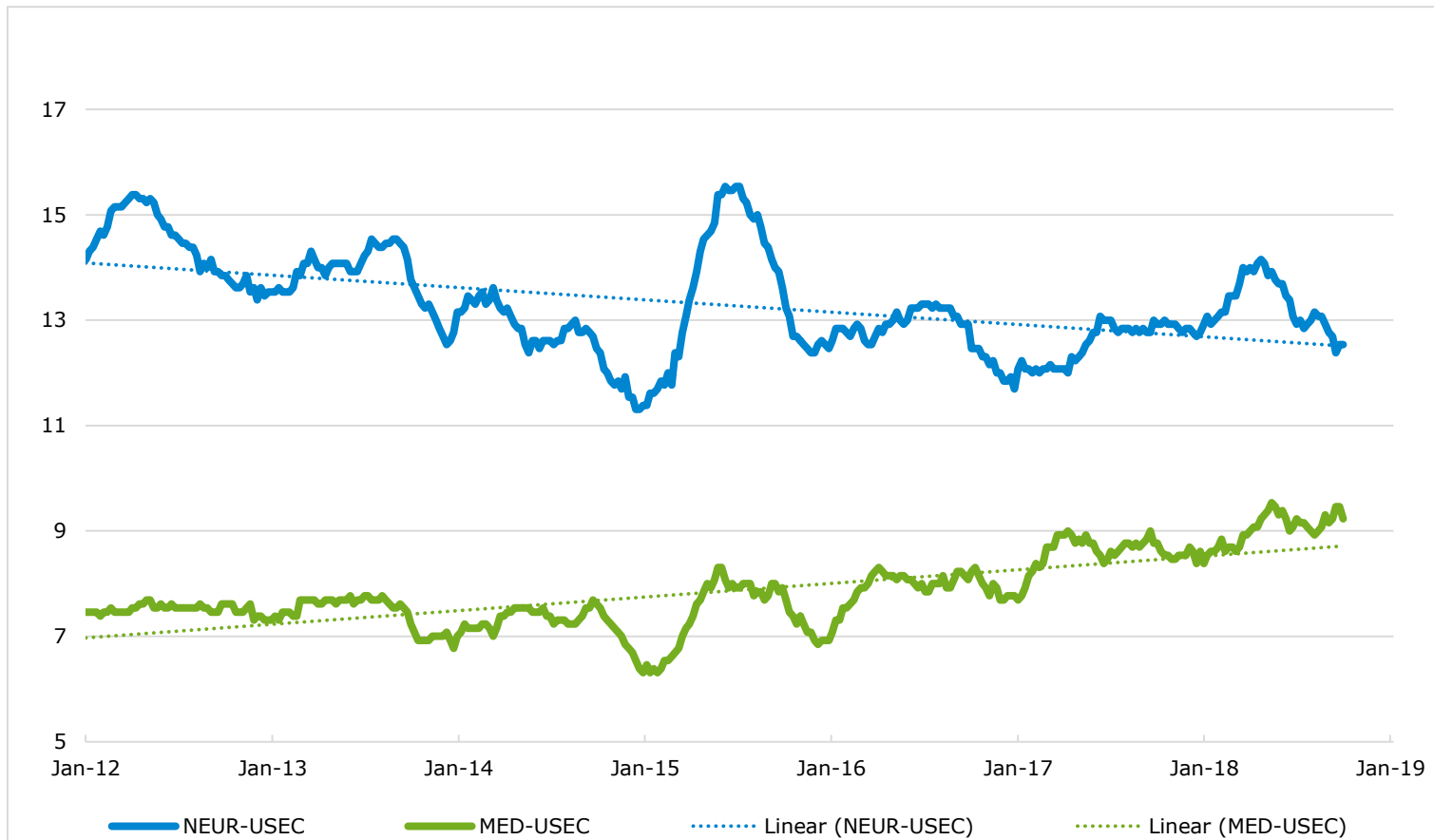
4. Service quality (service frequency)

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



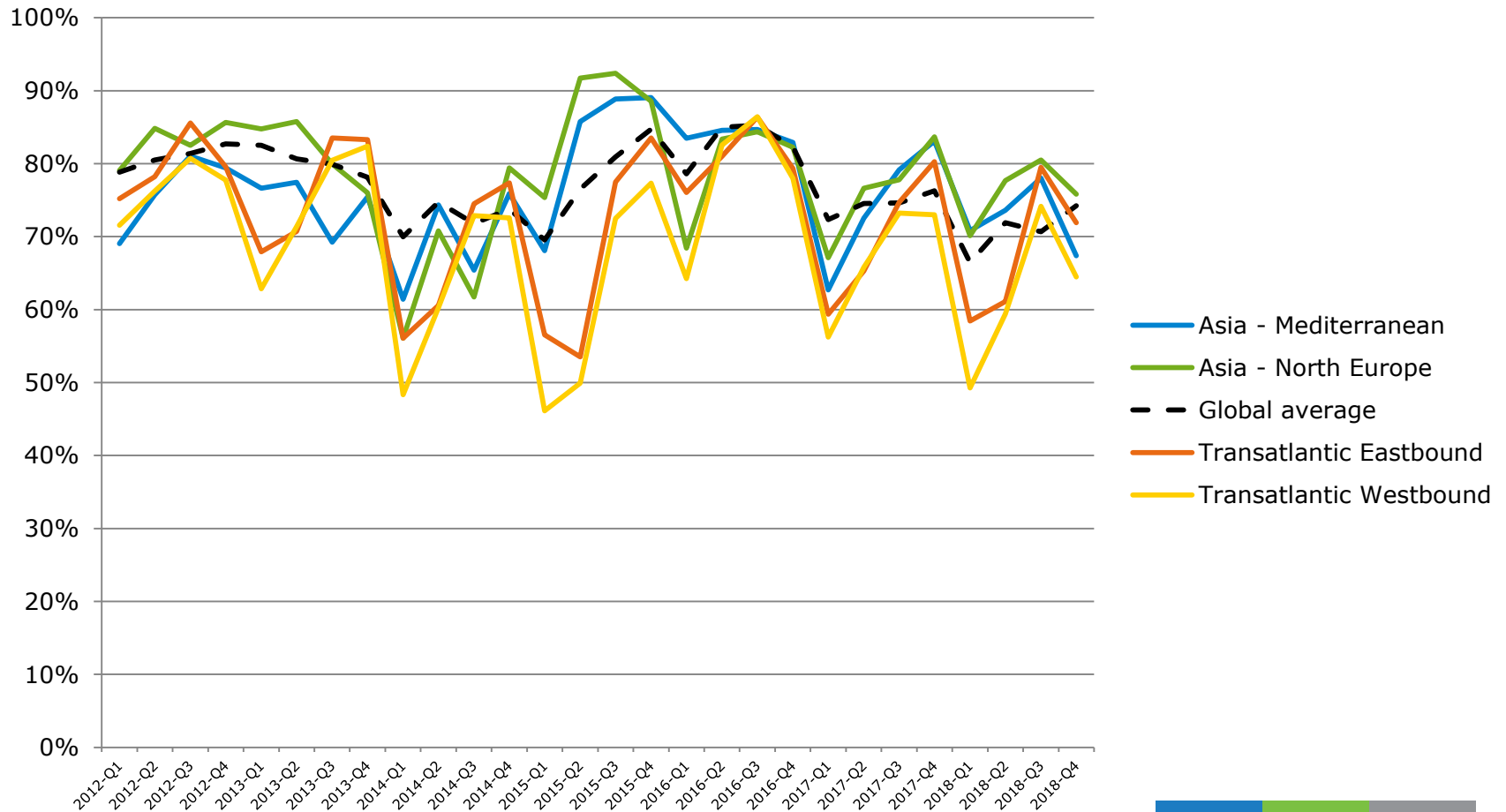
4. Service quality (service frequency)

Weekly service frequency on Transatlantic trade lanes 2012-2018



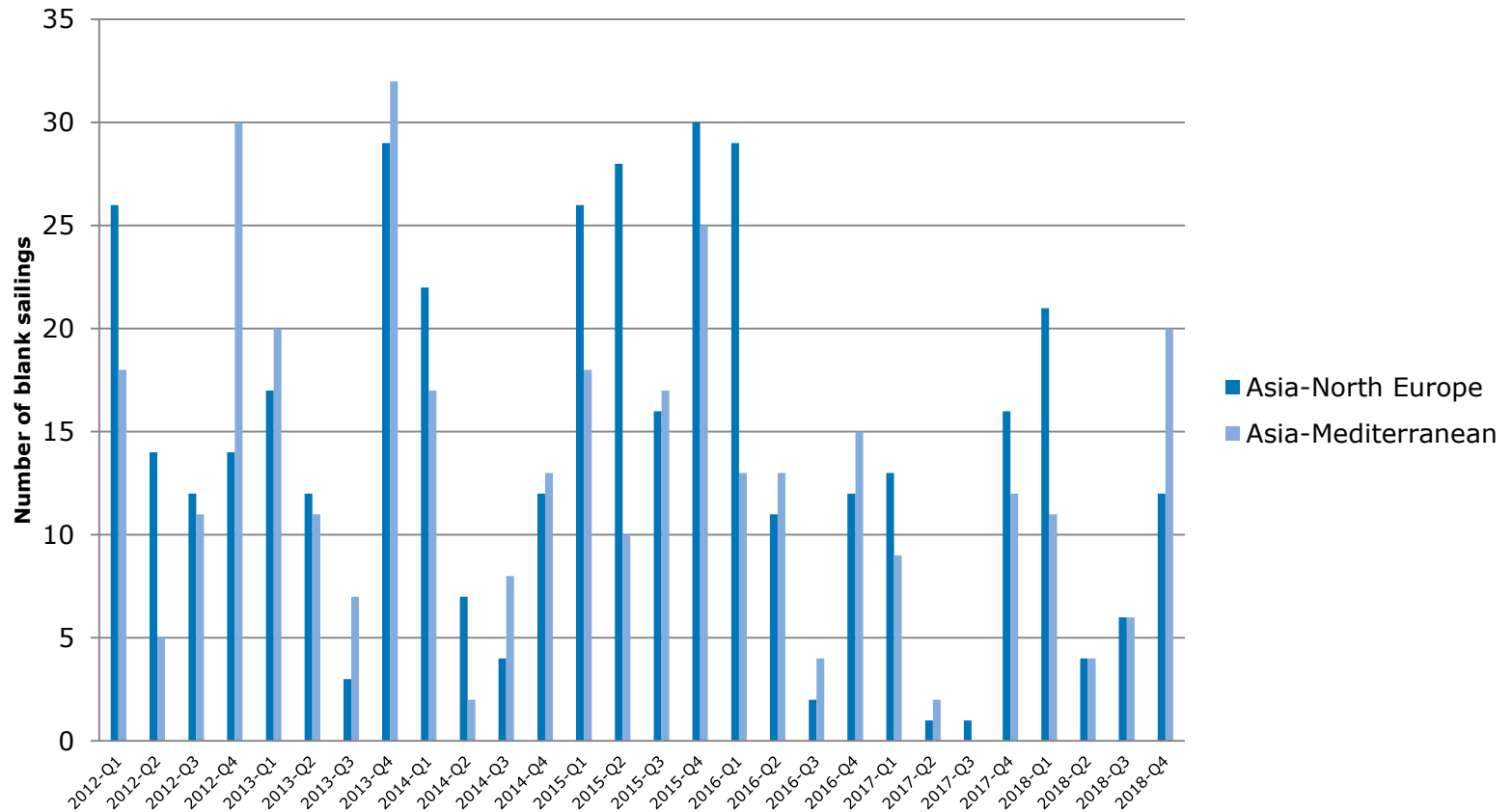
4. Service quality (schedule reliability)

Schedule reliability on European trade lanes (2012-2018)



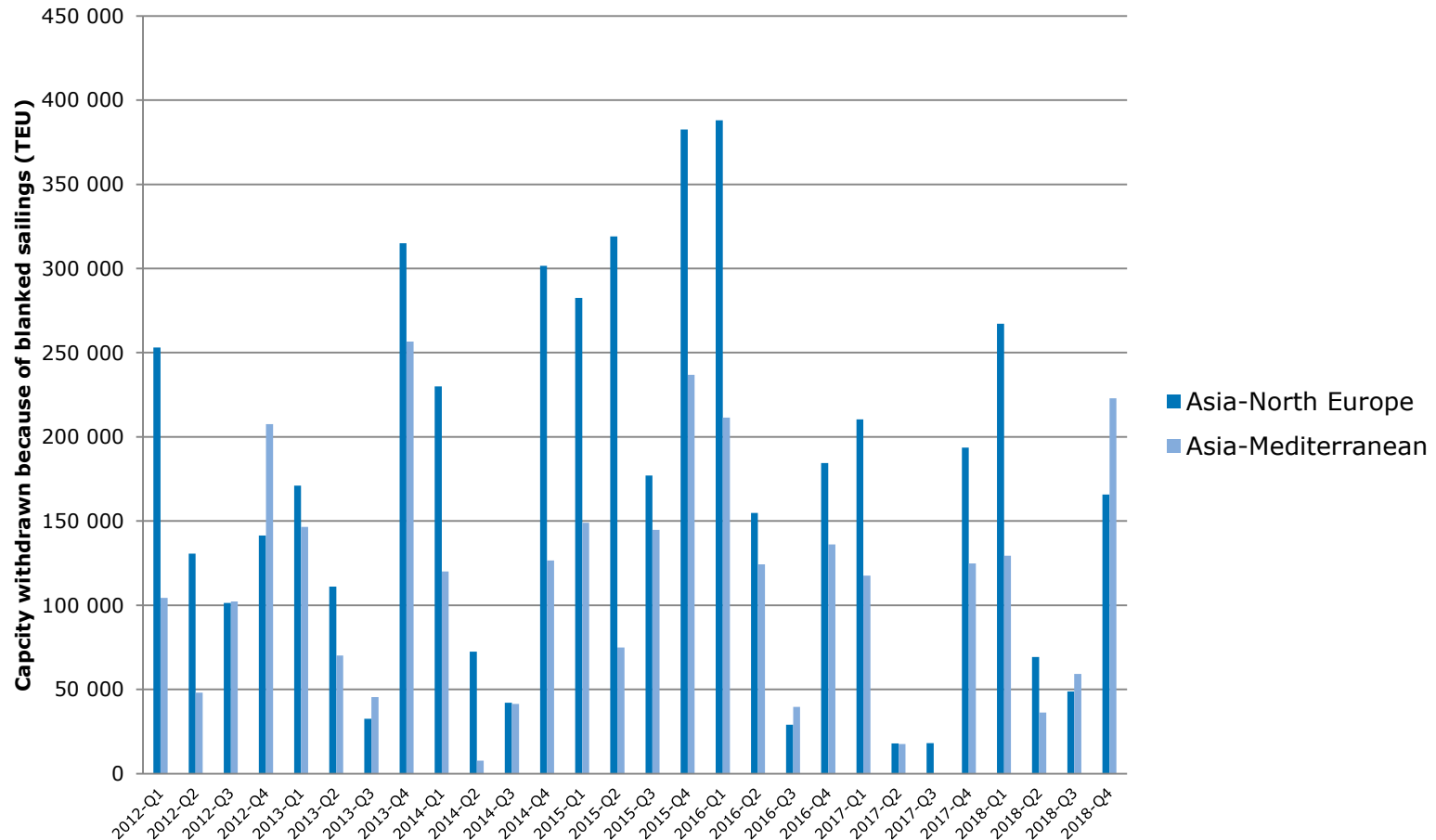
4. Service quality (blank sailings)

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



4. Service quality (blank sailings)

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



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?

