

SeaIntel Sunday Spotlight

July 14, 2013 – Issue 120

Weekly Indicators –
7 Jul - 14 Jul 2013

Executive Summary

Rate increase efficiency

We analyze the efficiency of the June 15 and July 1st rate increases on Asia to North Europe, Mediterranean, USEC, USWC, Middle East, East Coast South America, West Africa and Australia in three difference ways, and find significant differences in success rates.

The rate calamity in South America

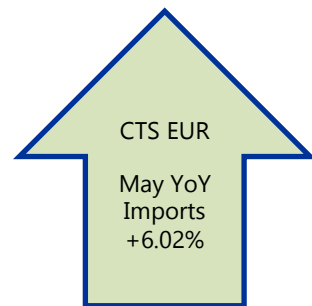
A combination of low demand and substantial capacity injections sends the Asia-South America market rates into a tailspin.

Carriers' exposure to different markets

We have investigated whether the carries had shifted their focus – and hence volume –due to the dramatic volatility in the container shipping markets, combined with the growth in what is generally being labeled “emerging markets” over the past 5 years. We find that the Asian carriers have downscaled their exposure to the two main deep-sea trades, Asia-Europe and Transpacific - and increased their exposure in Intra-Asia and PRC.

Content

Rate increase efficiency	Page 3
The rate calamity in South America	Page 8
Carriers' exposure to different markets	Page 10
Service changes	Page 15
Rate announcements	Page 15
SeaIntel products	Page 17



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