

SeaIntel Sunday Spotlight

July 6, 2014 – Issue 168

Executive Summary

Bunker Consumption for Jones Act Carriers

We analyse the consequences of the aging Jones Act fleet and its impact on bunker oil consumption, environment and look at the challenges that Jones Act carriers Matson and Horizon Lines are facing.

UN Liner Shipping Connectivity Index

We take a closer look at the UN's 2014 Liner Connectivity Index, which SeaIntel has been given a privileged preview. We find that the Asian countries of China, Hong Kong, Singapore, South Korea and Malaysia are still the most well-connected nations, while USA, Netherlands and Germany slowly are reaching the level China had back in 2004.

Collusion or rational behaviour?

We investigate patterns in announcements of general Rate Increases (GRIs) in the Asia-North Europe trade lane, and discuss whether the scope of the GRIs and the seeming uniformity of the GRI levels across carriers is indicative of collusion or rational behaviour.

Content

East-west GRI success	Page 2
Bunker Consumption for Jones Act Carriers	Page 3
UN Liner Shipping Connectivity Index	Page 9
Collusion or rational behaviour?	Page 16
Carrier Service Changes	Page 20
Carrier Rate Announcements	Page 21
SeaIntel products	Page 24

Weekly Indicators –

30 Jun – 6 Jul 2014

