

SeaIntel Sunday Spotlight

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Executive Summary

Continued erosive forces

We analyse freight rate erosion on the Asia-Europe and Transpacific trade lanes, and find that the Asia-Europe trade remains in the grip of strong erosive forces, and the data does not indicate any improvement of the situation.

Commoditisation of ports served on Asia-Europe

We analyse the number of unique port-to-port combinations on the Asia-Europe trade lane, and find that it has declined by nearly 10% since 2012. G6's number of unique port-to-port combinations has declined by 33% in the same period.

Changes in average vessel size

We take a closer look at the development in average vessel size in Asia-North Europe, Asia-MED, Asia-USWC, Asia-USEC and North Europe-ECSA trades over the last two years, and find that average vessel size in all trades has increased in excess of 10% from 2012 to 2014.

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Weekly Indicators –

11 – 17 Aug 2014

Port of Shanghai

July 2014 throughput

3.06m TEU
+2.8% Y/Y

Port of Savannah

July 2014 throughput

293,889 TEU
+19.2% Y/Y

DHL

2014-1H Global Container volume

1.438m TEU
+5.2% Y/Y

OOCL

2014-1H

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