

## SeaIntel Sunday Spotlight

June 14, 2015 – Issue 215

### Executive Summary

#### Asia-Europe capacity outlook 2015-16

We take a closer look at the outlook for capacity development on Asia-Europe for the rest of 2015 and for 2016, and find that if no services are closed Asia-North Europe capacity stands to grow by 3% Y/Y in 2015, while Asia-MED will grow by 8%. 2016 sees a reverse with Asia-North Europe growing 6% while Asia-MED is projected to grow just 3% in 2016.

#### Asia-Europe Utilisation, Jan-Apr 2015

Analysis of the development in capacity and volumes in the Asia-Europe trades shows that utilisation levels declined in 2015-Q1. Recent CTS data for April shows no improvement in volumes, so it should be expected that carriers will begin to respond with capacity cut-backs.

#### Declining ratio of local vessels

Small vessels suitable for feeder and short-sea services appear to be underrepresented in terms of new orders.

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### Weekly Indicators

8 - 14 June 2015

#### CTS

April 2015  
Asia-North  
Europe volumes

750,647 TEU  
-9.4% Y/Y

#### Port of Shanghai

Apr 2015  
Container  
Volumes

3.16M TEU  
+4.7% Y/Y

#### Port of Nhava Sheva

Apr 2015  
Container  
Volumes

747,000 TEU  
+4% Y/Y

#### Port of Kaliningrad

Jan-Apr 2015  
Container  
Volumes

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