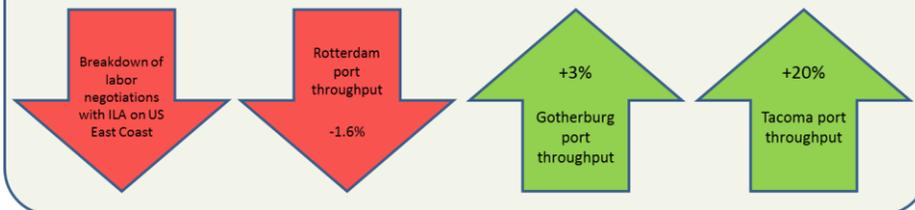


Indicators from the week 20 Aug. – 26 Aug. 2012



Container Reliability July 2012 INTRA + SeaIntel data

See page 15 for details.

GOLDEN WEEK CAPACITY REDUCTIONS

Insufficient capacity reductions announced, Asia-Europe need to see 75.000TEU/week additionally pulled

We have previously analyzed the week-on-week capacity variability in the main Asia-Europe and Transpacific trades in the SeaIntel Sunday Spotlight. The result was that weekly variability could have a substantial impact on the supply/demand balance on a weekly basis.

This week we have chosen to analyze the variability for the coming 12 weeks on the Asia-Europe trade and the Transpacific trade as the Chinese holiday – Golden week – is approaching and we therefore expect to see a decline in the weekly capacity after Golden week, as carriers respond to the temporary reduction in volume.

Overall, we have identified 43 services in the Asia-Europe trade and we have identified 64 services operating between Asia and North America. Out of the 64 services, 22 of them serve the North American east coast directly, while the remaining 42 services are calling the US west coast.

Overall we find that the average weekly volume has increased 5% on the Asia-Europe trade compared with the average weekly capacity we saw in the trade, when we made the same analysis back in May this year. The average weekly capacity on the Transpacific trade is nearly identical to

Real or not?

Labor negotiations on the US East Coast were suspended Wednesday. Old hands will remember the port closures on the US West Coast in 2002, which were highly costly to the US economy and disrupted supply chains for months. The ILA union knows this as well; hence is the negotiation breakdown caused by real disagreements – or is it a negotiation tactic intended to put pressure on shippers, who in turn will put pressure on the carriers? Time will tell, but the clock runs out on Sept.30.

Content

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- 8...Q2 market share
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