GREENCARRIER

YANG MING

Nautiska Föreningens Vintermöte

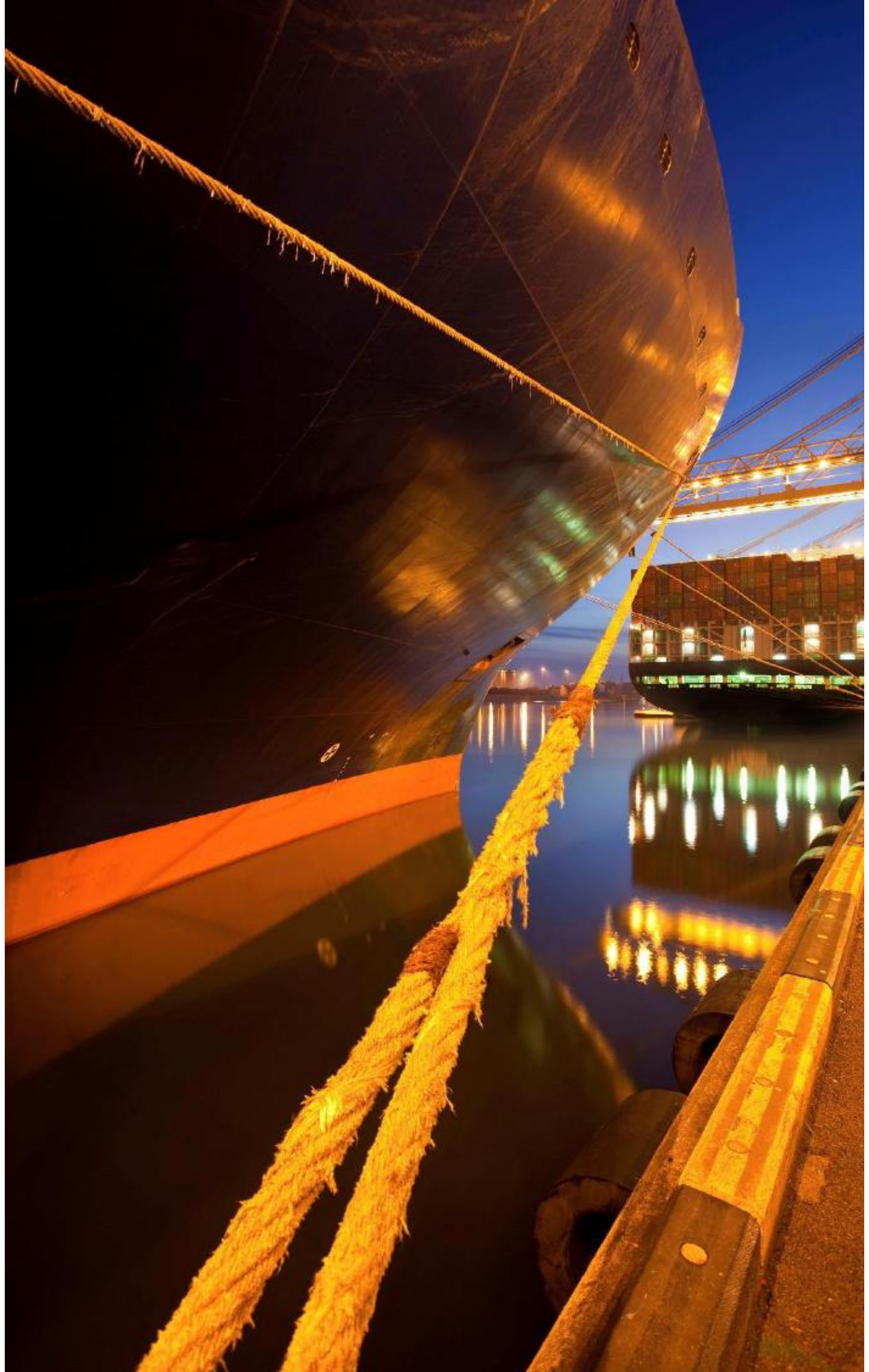
2019-01-29

Wilhelmina Lund & Fredrik Hermansson

Tema:

”- Linjeagenterna – konsolidering och investeringar i containerbranschen”

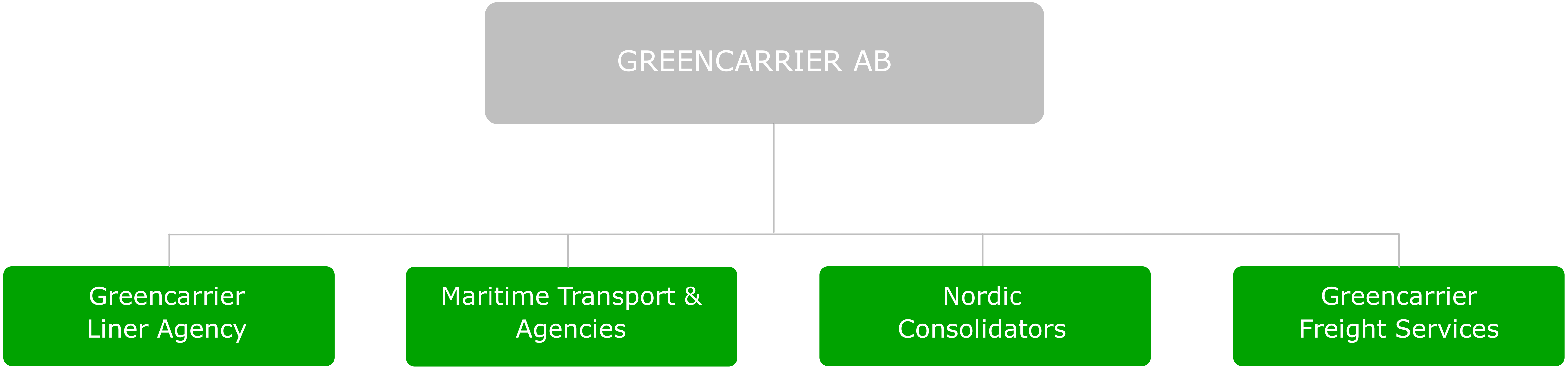
Alexander Broström



Fredrik Hermansson

?

Operating independent in 4 business areas



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As Agent for Evergreen Line

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Greencarrier Liner Agency

-As Agent for Evergreen Line

- 7 offices in 7 countries
- Approx. 100 employees
- In cooperation with Evergreen since 1979

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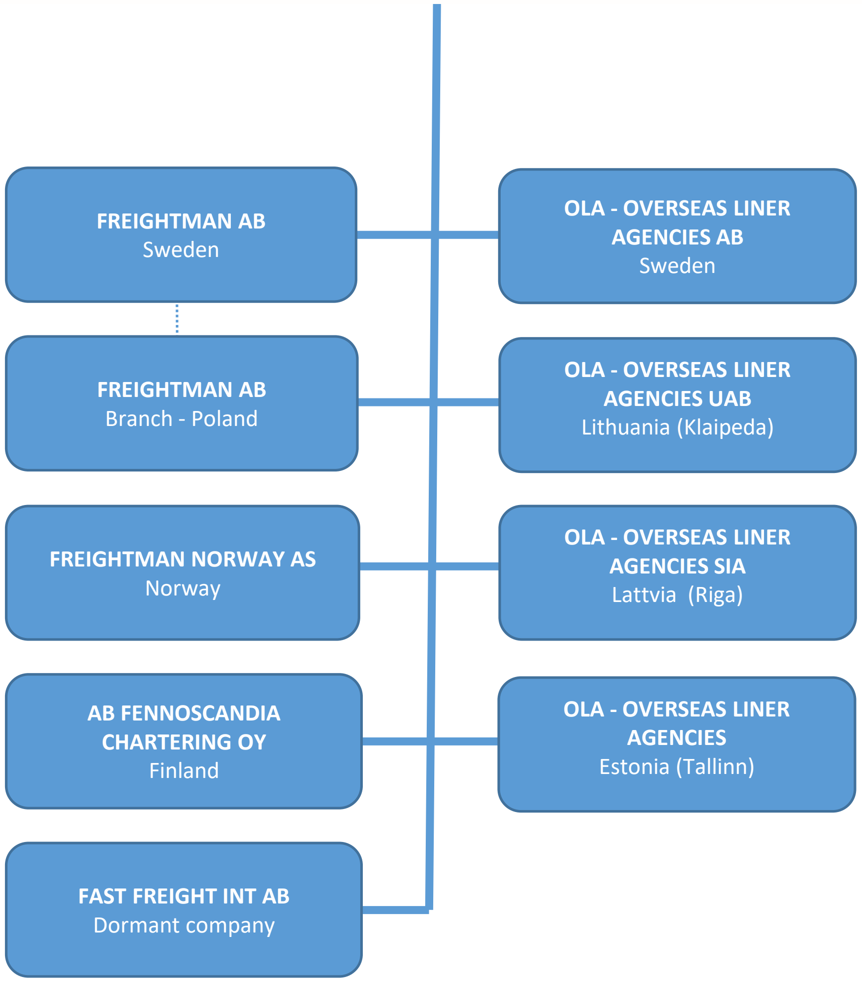
WILHELMINA LUND

Vice VD för Freightman AB och OLA Overseas Liner Agencies AB

Bakgrund:
BSc - Management & Organization – Gothenburg Universiry (Handelshögskolan)
MSc - Leadership & Management – Universiteit van Amsterdam

LUNDGROUP



FREIGHTMAN AB
Sweden
FREIGHTMAN AB
Branch - Poland
FREIGHTMAN NORWAY AS
Norway
AB FENNOSCANDIA CHARTERING OY
Finland
FAST FREIGHT INT AB
Dormant company
OLA - OVERSEAS LINER AGENCIES AB
Sweden
OLA - OVERSEAS LINER AGENCIES UAB
Lithuania (Klaipeda)
OLA - OVERSEAS LINER AGENCIES SIA
Lattvia (Riga)
OLA - OVERSEAS LINER AGENCIES
Estonia (Tallinn)

FREIGHTMAN

- Grundat 1973
- Agent för:
- **SCI** – Shipping Corporation of India Ltd. (Sverige, Finland, Norge, Polen)
- **ESLSE** – Ethiopian Shipping Logistics Service Enterprise (Sverige, Finland, Norge, Polen, St. Petersburg)
- W.E.C. Lines B.V. (Sverige)
- Men också;
  - Spedition, flyg, projektlast, tullhantering, charter av båt och flyg m.m.

OVERSEAS

- Grundat 1987
- Agnet för **Yang Ming**

(Sverige, Estland, Lettland och Litauen)

YANG MING


YANG MING A Transport Group With Excellence
We Deliver GOOD for Life
YANG MING


YANG MING
YANG MING

Supply & Demand

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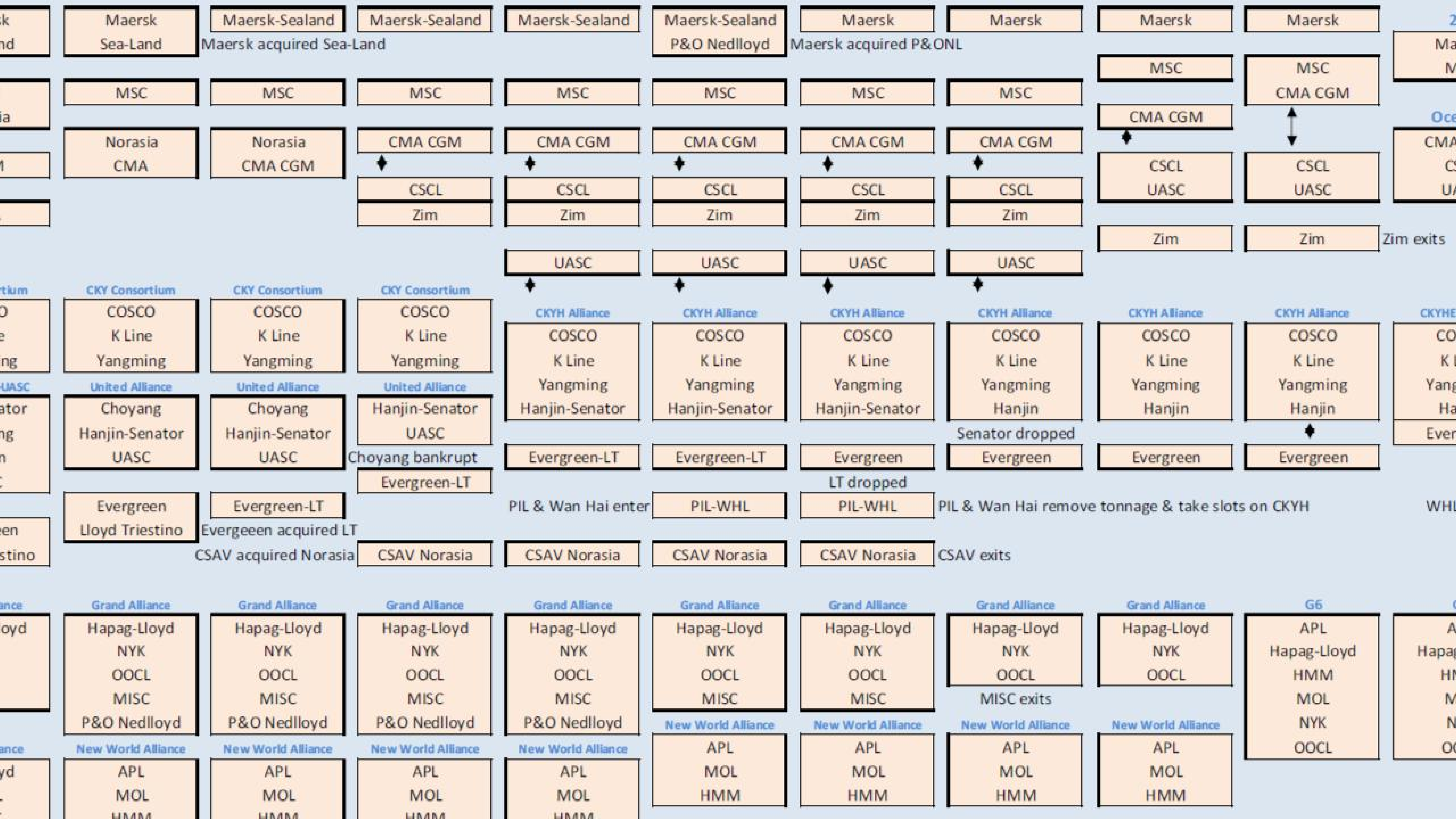

Maersk
Sea-Land
Maersk-Sealand
Maersk acquired Sea-Land
Maersk-Sealand
Maersk-Sealand
Maersk-Sealand
P&O Nedlloyd
Maersk
Maersk acquired P&ONL
Maersk
Maersk
Maersk
MSC
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CMA CGM
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COSCO
K Line
Yangming
CKY Consortium
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Hanjin-Senator
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Yangming
Hanjin
Senator dropped
CKYH Alliance
COSCO
K Line
Yangming
Hanjin
CKYH Alliance
COSCO
K Line
Yangming
Hanjin
United Alliance
Choyang
Hanjin-Senator
UASC
United Alliance
Choyang
Hanjin-Senator
UASC
United Alliance
Hanjin-Senator
UASC
Choyang bankrupt
Evergreen-LT
Evergreen-LT
Evergreen-LT
Evergreen
LT dropped
Evergreen
Evergreen
Evergreen
Evergreen
Lloyd Triestino
Evergreen-LT
Evergeeen acquired LT
PIL & Wan Hai enter
PIL-WHL
PIL-WHL
PIL & Wan Hai remove tonnage & take slots on CKYH
CSAV acquired Norasia
CSAV Norasia
CSAV Norasia
CSAV Norasia
CSAV Norasia
CSAV exits
Grand Alliance
Hapag-Lloyd
NYK
OOCL
MISC
P&O Nedlloyd
Grand Alliance
Hapag-Lloyd
NYK
OOCL
MISC
P&O Nedlloyd
Grand Alliance
Hapag-Lloyd
NYK
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Grand Alliance
Hapag-Lloyd
NYK
OOCL
MISC
Grand Alliance
Hapag-Lloyd
NYK
OOCL
MISC exits
Grand Alliance
Hapag-Lloyd
NYK
OOCL
G6
APL
Hapag-Lloyd
HMM
MOL
NYK
OOCL
New World Alliance
APL
MOL
New World Alliance
APL
MOL
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APL
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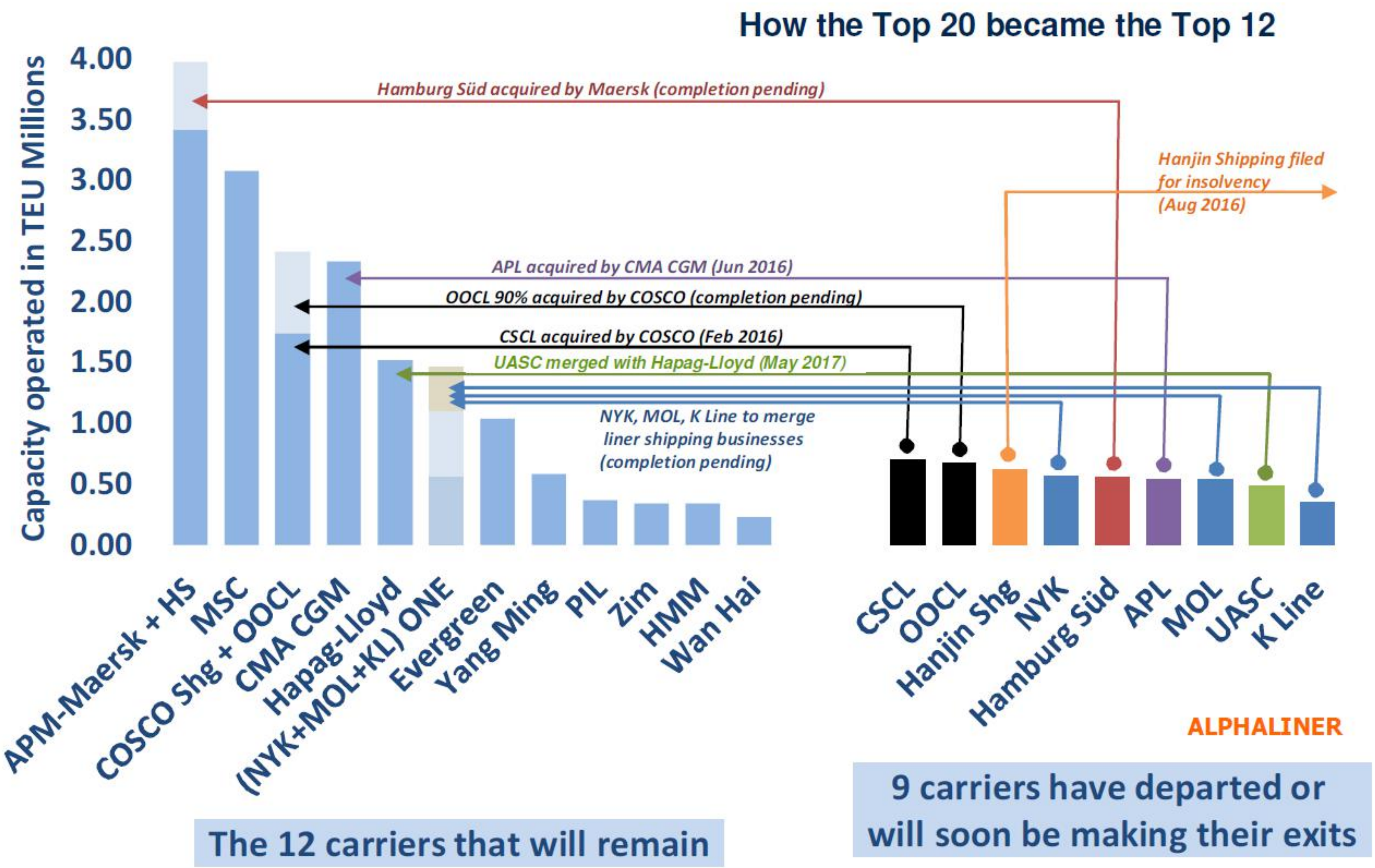
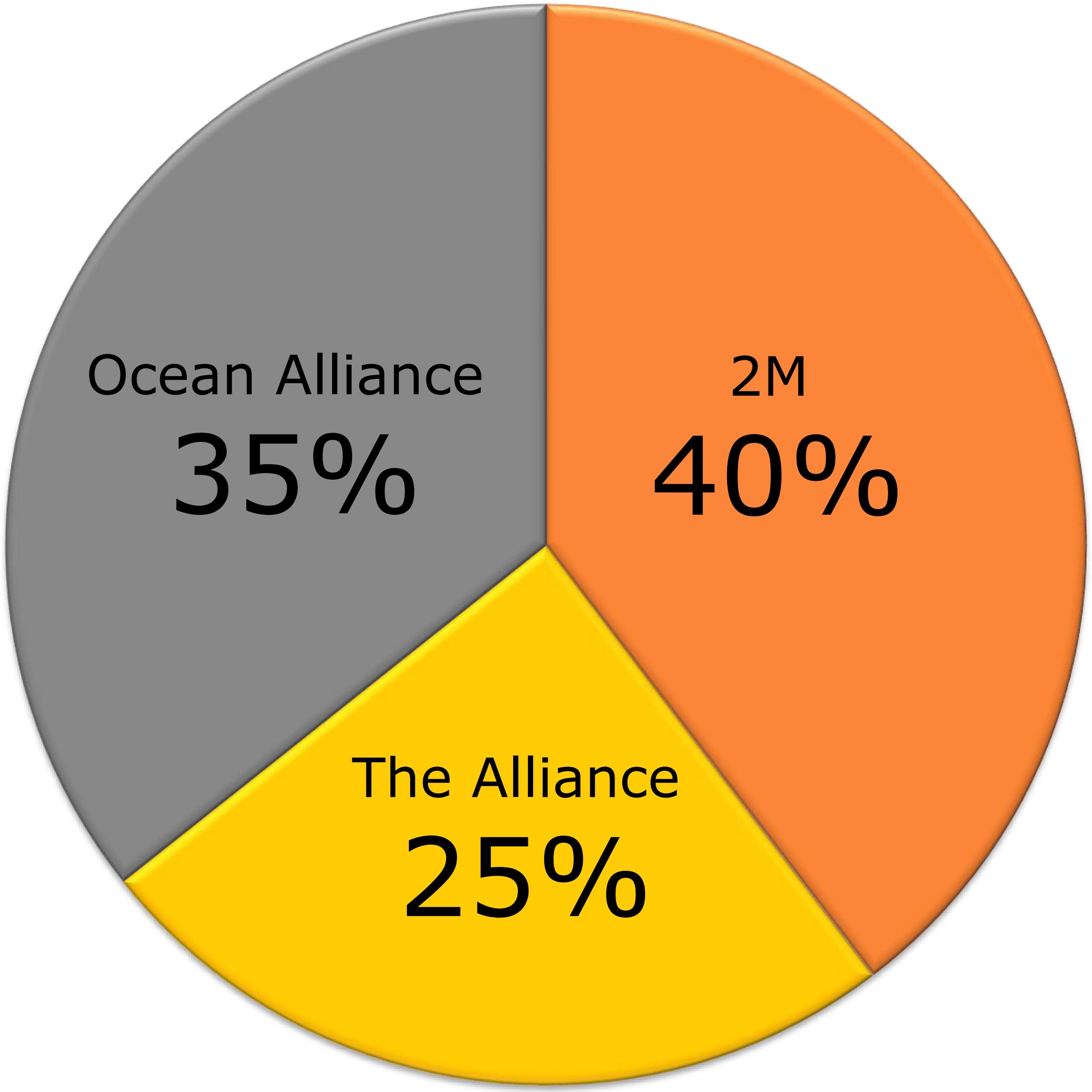
Shipping World Changes



(Source: Alphaliner, July, 2017)

Alliance Market Share: Asia – EUR Capacity Share

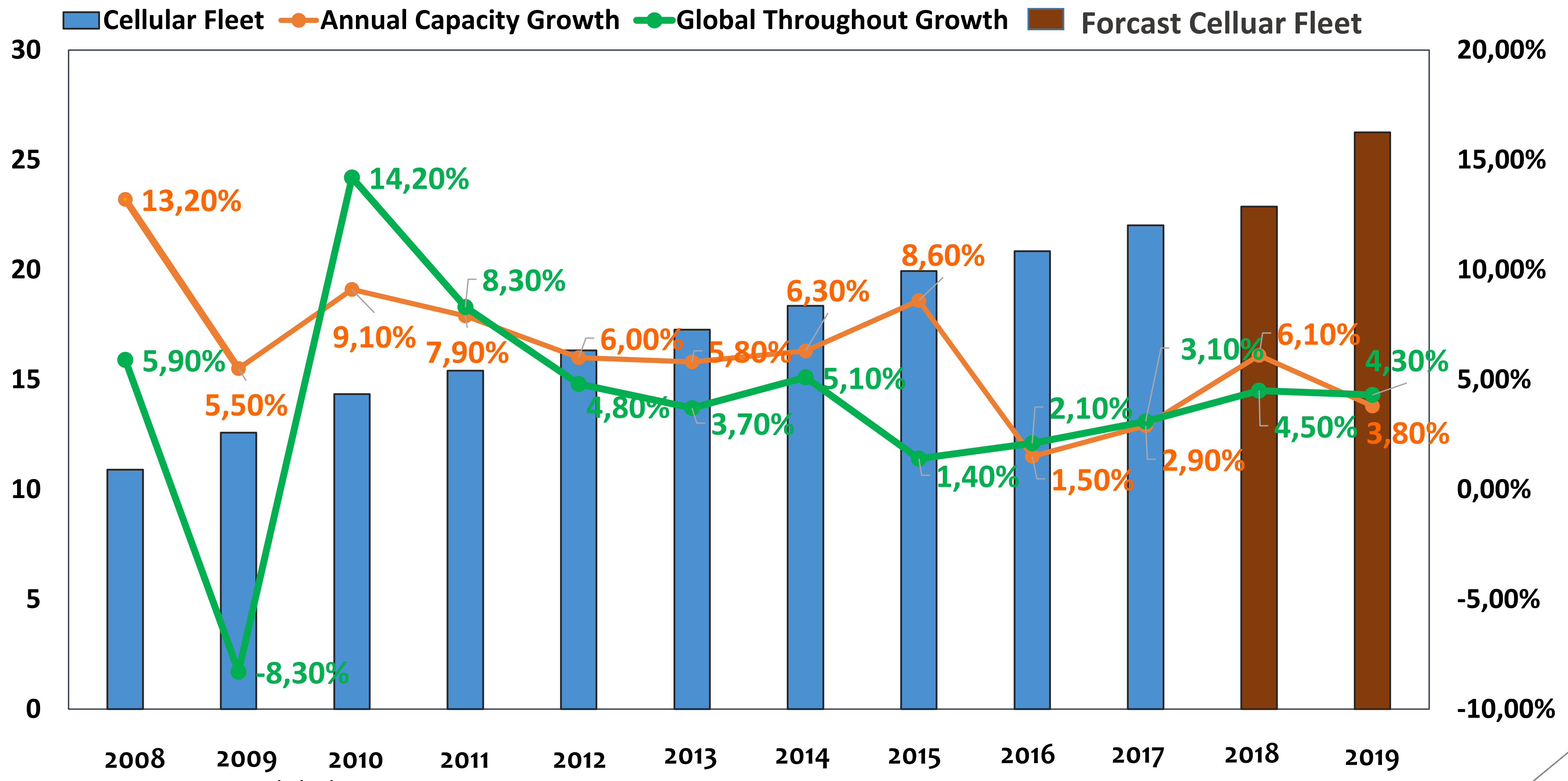


6 Loops (93,000TEU)

6 Loops (103,309TEU)

5 Loops (64,250TEU)

Cellular Fleet Growth vs Global Throughout



DATA SOURCE : Alphaliner

Growth of containerisation

New Merging Markets

Meeting growth

Containerisation crucial for development of global trade.

Trends pointing towards more containerisation:

1. Global trade patterns and new challenges for China
2. Industries are adapting to containerisation
3. Tug of war between containers and roro
4. Gained ground from general cargo and break bulk
5. Further potential for containerisation of timber

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World Trade Balance

THREE LEADERS

- America – Donald Trump
- China – Xi Jinping
- Russia – Vladimir Putin

TEN THREATS

1. Poverty
2. Infectious Disease
3. Environmental Degradation
4. Inter-State Conflict
5. Civil War
6. Genocide
7. Atrocities including Trade in Children
8. Proliferation
9. Terrorism
10. Transnational Crime

TWELVE POLICIES

1. Agriculture
2. Diplomacy
3. Economy
4. Education
5. Energy
6. Family
7. Health
8. Immigration
9. Justice
10. Security
11. Society
12. Water

ONE CENTURY – OF PEACE

Utmaningar/Möjligheter

- Storlek Hamnar / Fartyg / Allianser
- Hamn – Hamn konkurrens
- Geografisk Position
- Avgifter, Sjöfartsverket avgiftshöjningar t.ex. Farledsavgifter, Lots
- Miljö, SECA & ECA (Emission Control Areas)
- Kund fokus / Teknologi
- Kostnadsreducering i.e. productivity

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The ports

- Who are the competitors?
- ROI?
- Less ports, priority, investments?
- Port, who do they cooperate with?

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Port Updates

Rank		Port	1H 2018 TEU	Growth % 1H 18 vs 17	2Q 2018 TEU	Growth % 2Q 18 vs 17	1Q 2018 TEU	Growth % 1Q 18 vs 17
1	(1)	Shanghai	20,506,800	4.6%	10,767,000	5.0%	9,739,800	4.1%
2	(2)	Singapore	18,021,268	11.6%	9,156,644	7.2%	8,864,624	16.5%
3	(4)	Ningbo-Zhoushan	13,311,800	7.5%	6,818,300	5.2%	6,493,500	10.4%
4	(3)	Shenzhen	12,075,500	1.9%	6,104,400	-2.1%	5,971,100	6.4%
5	(6)	Busan	10,633,043	4.3%	5,512,057	4.0%	5,120,986	4.6%
6	(7)	Guangzhou	10,543,400	8.4%	5,609,900	7.2%	4,933,500	9.7%
7	(5)	Hong Kong	9,857,000	-3.8%	4,969,000	-7.5%	4,888,000	0.2%
8	(8)	Qingdao	9,381,200	3.2%	4,835,600	5.5%	4,545,600	0.7%
9	(9)	Los Angeles-Long Beach	8,262,066	4.1%	4,255,534	3.6%	4,006,532	4.7%
10	(11)	Tianjin	7,807,600	5.2%	4,206,100	3.3%	3,601,500	7.5%
11	(10)	Dubai	7,738,000	0.2%	3,912,000	-2.3%	3,826,000	3.0%
12	(12)	Rotterdam	7,077,406	6.2%	3,606,810	6.4%	3,470,596	6.1%
13	(13)	Port Kelang	5,875,909	-5.7%	2,942,871	-2.0%	2,933,038	-9.1%
14	(14)	Antwerp	5,567,905	8.3%	2,823,679	6.0%	2,744,226	10.7%
15	(16)	Kaohsiung	5,183,803	0.1%	2,622,379	2.3%	2,561,424	-2.1%
16	(15)	Xiamen	5,165,600	7.6%	2,673,900	4.4%	2,491,700	11.6%
17	(17)	Dalian	4,815,400	0.4%	2.601,100	0.2%	2,214,300	0.6%
18	(19)	Tanjung Pelepas	4,382,002	5.8%	2,198,075	4.3%	2,183,927	7.4%
19	(18)	Hamburg	4,355,000[(f)]	-2.7%	2,194,863[(f)]	-2.6%	2,160,137	-2.8%

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Sustainability

Environmental Regulation Timeline

international shipping is a heavily regulated industry. in this decade, it will see a plethora of additional regulations becoming effective, with significant economic and operational implications. Managing their cumulative impact may be one of the decade's key challenges for individual companies; those not making the right strategic choices may face a severe impact on their long-term viability

2010-2014
- 1% ECA Sulphur limit
- Nox tire II for new build
- HFO pro-Habited in Antarctica

2015
- 3.5% global Sulphur limit
- 0.1% Sulphur Limit in Calf.
- BW convention
- NAME ECA
- 1% ECA Sulphur limit
- Entry into Force of EEDI and SEEMP

2016
- Nox tire III for new build

2017
- EU MBM Fully Implement

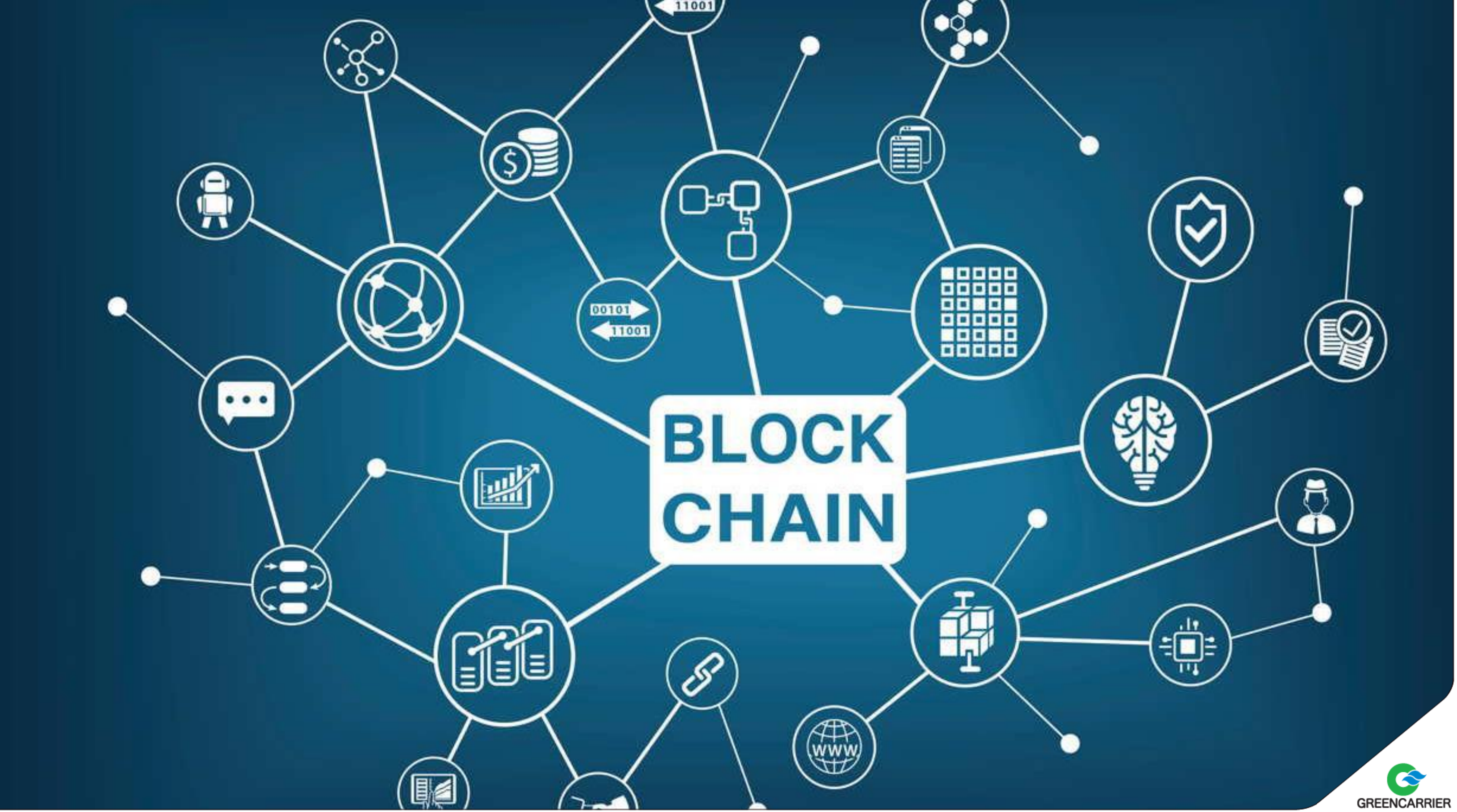
2018
- IMO Sulphur Availability review

2019
- 0.5% Global Sulphur limit
- BW treatment
- Entry info Recycling convention

2020

The maritime industry will be faced with ever increasing requirements for safety, security, environmental and efficiency performance beyond 2020. Environmental and efficiency demands will remain front and centre for technology development, with the IMO global sulphur limit and the EEDI being the strongest drivers. This may lead to fundamental changes in the industry.

Source: DNV



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Safety & Insurance

What to do?

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Yes, it’s possible!