

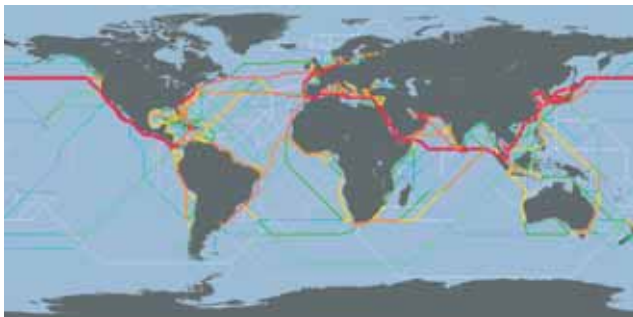
For the first time - the hard facts on supply and demand in the container business

- How will global shipboard supply and demand change in the next five years?
- Which routes will show most supply pressure?
- How will the ports manage?
- Where does port capacity need to expand and by how much?

Questions like these, and many more, are answered in this new publication - *Supply and Demand in the Container Trades* - from MDS Transmodal that not only charts the changes in historic supply and demand but also provides a route by route supply/demand forecast to 2011. Based on an entirely new and unique analysis of global demand for containerised traffic, the supply of port terminal capacity and the detailed deployment of the world's container fleet, the report provides an incisive analysis of the fundamentals of the world container shipping market. This new combination of data sources, as well as providing the data on which this report is based, is also marketed as a separate analytical consultancy service—the *World Freight Model*—by MDS Transmodal.

The report contains demand-side analyses and forecasts covering the period 1996-2011, provided at the global level and for nine geographic regions. Forecasts are

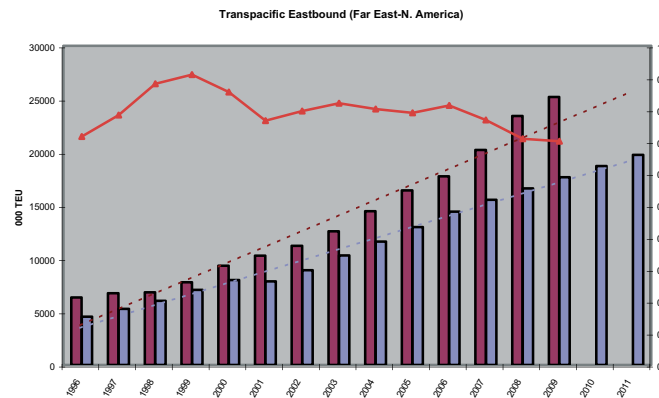
Mapped deployment of all containerships, Q4 2006



generated using an in-house computer model which converts world trade statistics into transport-friendly outputs of direct relevance to ports and shipping, in terms of TEU, loaded and empty containers and direction of trade. A unique feature of these forecasts is that they are constructed from a myriad of individual country/commodity forecasts and are consistent at all levels of aggregation.

Supply and Demand in the Container Trades provides detailed statistics covering all aspects of the development of the containership fleet since 1990, including deployment by carrier, the fleets of the top 30 carriers, analysis of the 200 biggest ships operating in the fleet, the deployment of the Post-Panamax fleet and fleet forecasts to 2009.

Predicted Transpacific Load Factor (red)



The report publishes detailed throughput statistics of the world top 30 ports in 2005 comparing relative positions in earlier years, analysing transshipment trends and forecasting port capacity to 2011. A new concept of port connectivity is also introduced, where ports are ranked according to the number of ports that can be reached directly by services calling at a port multiplied by the capacity of services deployed on those connections.



Some headline statistics from the report...

- Containerised maritime cargo grew from 332 million tonnes to an estimated 765 million tonnes between 1996 and 2006, representing an annual growth rate of 8.8%. This volume is forecast to increase by 42% to 1,086 million tonnes by 2011.
- Total global container port traffic, including transhipped containers, reached an estimated 452 million TEU in 2006, up 11% on 2005. This is forecast to increase in volume by 40% to reach 632 million TEU by 2011, representing a growth rate of 7% per annum over the next five years.
- By 2011 an extra 85 million TEU of port capacity in the major container ports will be required to handle this traffic – equivalent to 65 kms of new container berths.
- The containership fleet will grow from 11.3 million TEU slots in 2006 to over 16 million TEU in 2011.
- The total volume of transshipment traffic handled worldwide increased from 31 million TEU to 91 million TEU between 1996 and 2005, achieving an average growth rate of 13%. This increased to 103 million TEU in 2006 and in the next five years the volume of transshipment traffic will increase by a further 41%, to reach 145 million TEU.

Containing 30 tables, 20 colour charts and 16 statistical appendices, this 80 page report, and the *World Freight Model* from which it is derived, are set to become a key statistical reference source for the container industry. Order your copy now. Or use the form overleaf to make an enquiry about our consulting services and the *World Freight Model*.

