

GLOBAL SHIPPING

AGENDA

MARKET OUTLOOK

INDUSTRY OUTLOOK

OUTSIDE-IN PERSPECTIVE

INSIDE-OUT PERSPECTIVE

DIVERSIFICATION



Deloitte.

GLOBAL SHIPPING MARKET OUTLOOK

2010-2018

Max.

Min.

Now

New Normal

Return on Equity rates

15

-5

3-5

Fuel prices

130

29

70

EUR/USD

1,5

1,0

1,25

GDP Growth

4,5

2,3

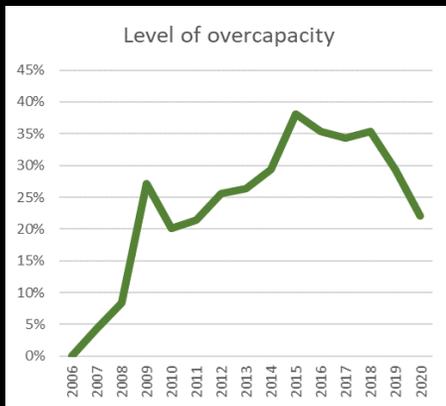
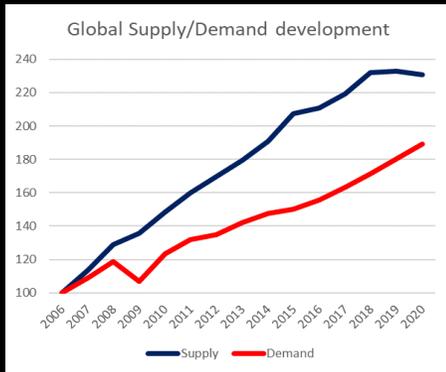
2,5

After app. 60 years of stability global shipping is now faced with unstable market conditions

No signs over the coming 10 years that the development will ease off

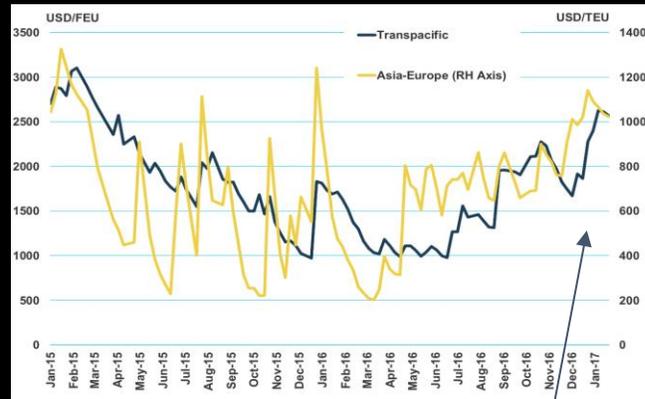
GLOBAL SHIPPING INDUSTRY OUTLOOK

OVER CAPACITY

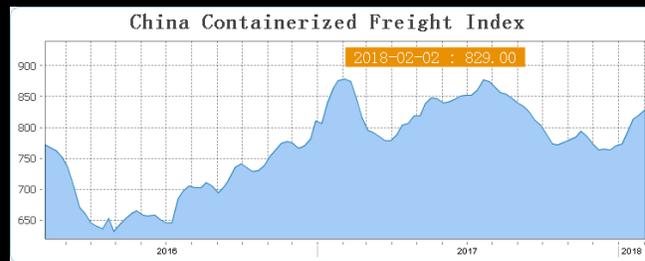


Source: SeaIntelligence, January 2018

PRICE WAR



Hanjiin Bankrupt



SOME TRENDS

Rolls-Royce Opens Autonomous Ship R&D Centre in Finland



Engineering company Rolls-Royce has opened a research facility in Turku, Finland, to develop the technologies needed to shape the future of autonomous global shipping industry.

DIGITAL JOURNAL <http://www.digitaljournal.com/business/shipping-is-undergoing-digital-disruption/article/507805>

Shipping is undergoing digital disruption

Posted Nov 16, 2017 by [Tim Sandle](#)

SealIntel: Maritime Technology Investments Nearing USD 1 Bn

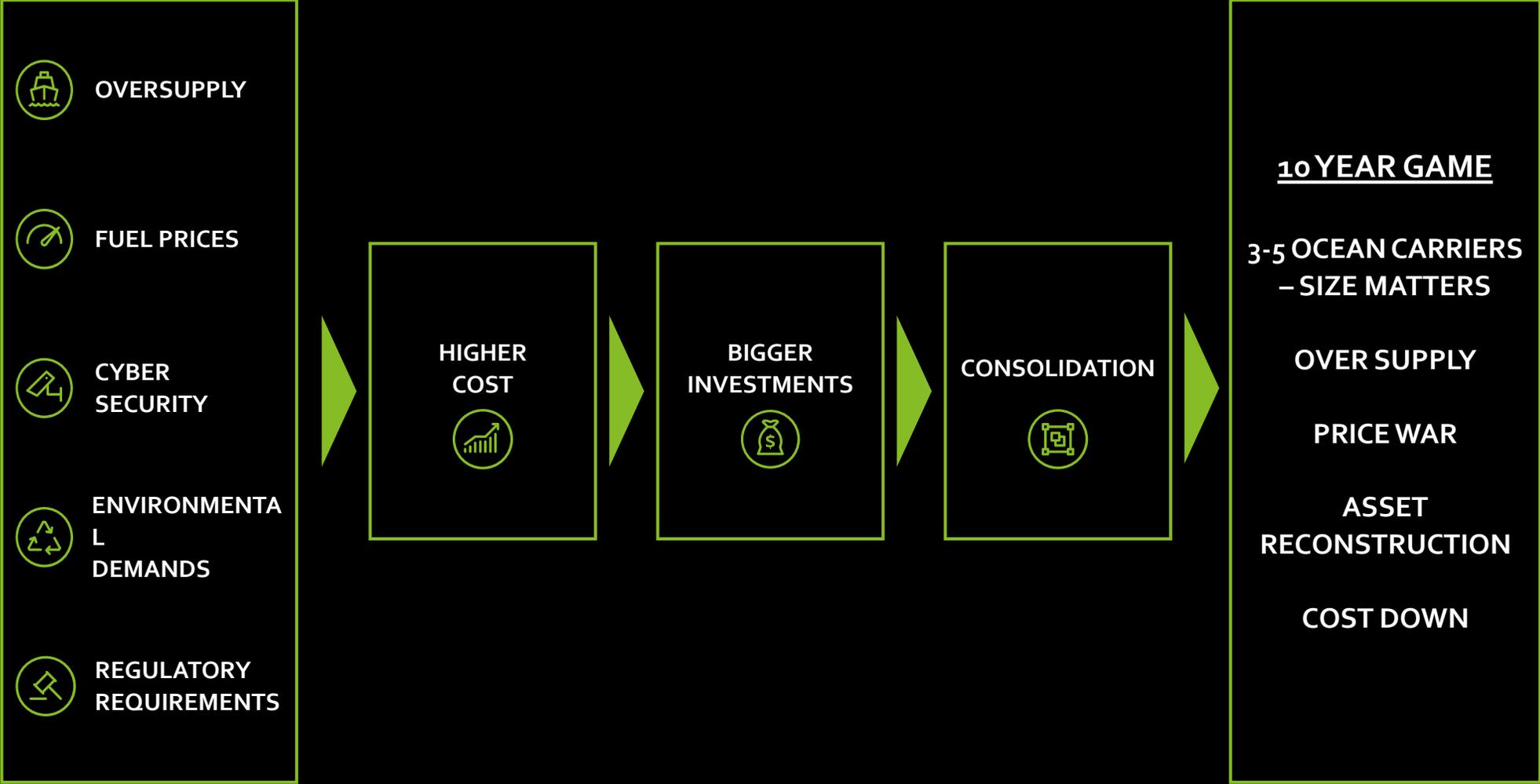


Technology investments in the maritime industry are getting close to USD 1 billion, according to data by Crunchbase, a database of technology investments.

Container shipping

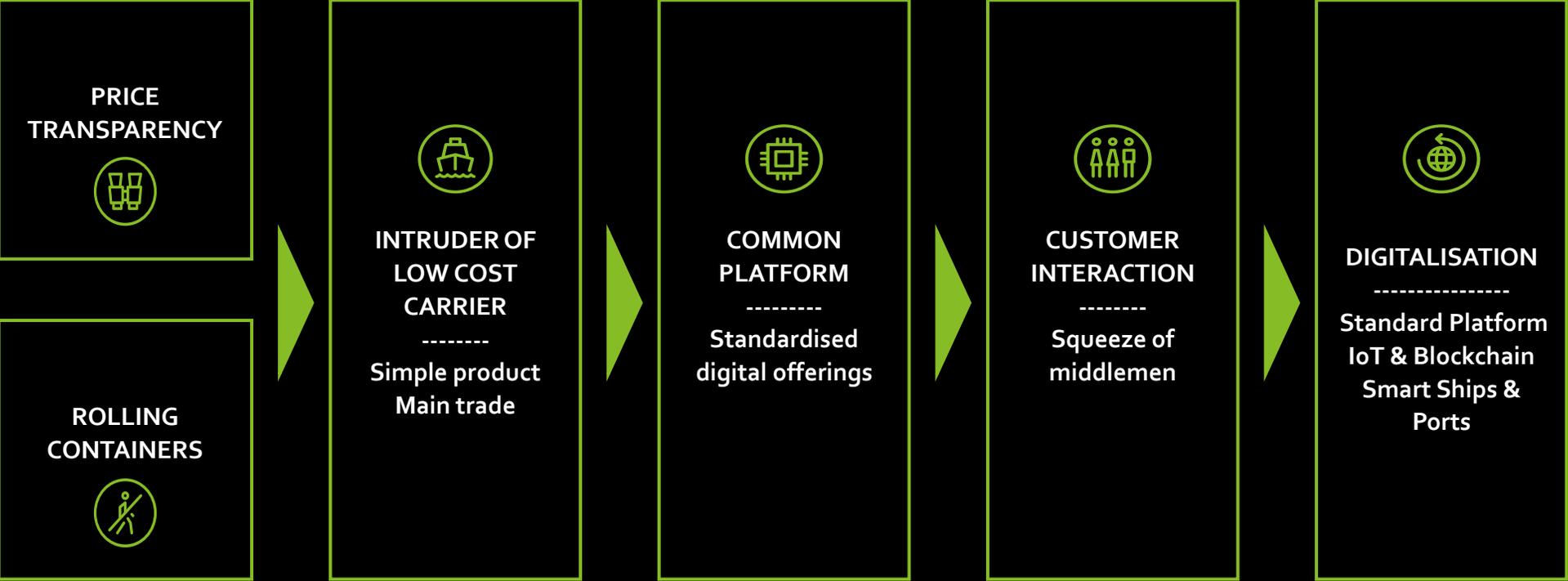
Container shipping faces critical moment after years of losses

GLOBAL SHIPPING OUTSIDE-IN PERSPECTIVE



GLOBAL SHIPPING

INSIDE-OUT PERSPECTIVE



DISRUPTION OF THE CLASSICAL VALUE CHAIN?



GLOBAL SHIPPING DIVERSIFICATION

AGILE CAPABILITIES & TECH TALENT

PREDICTIVE ANALYTICS & AI

SMART SHIPS AND PORTS

PARTNERING INTEGRATION WITH E2E SUPPLY CHAIN

**DIGITAL TRANSFORMATION
IOT – BLOCKCHAIN – CYBER SECURITY**

