SHIPPING LINE ALLIANCES

Major trends in the shipping industry

1. The global fleet has grown, with more vessels of greater capacity. Major operators, like Maersk, are expanding their fleet sizes.

2. Such vessels require deeper draft channels for larger vessels. These vessels often require special terminal designs to handle larger cargoes.

3. Consolidation in the shipping industry has resulted in recent merger and acquisition activity, such as:
   - The Hapag-Lloyd acquisition of Maersk
   - The CMA CGM acquisition of Container Terminals

4. These alliances and mergers have led to increased efficiencies and reduced costs for shipping companies.

5. The impact of these alliances on market development is significant, influencing trade flows and geopolitical relationships.
actions and focus on labor negotiations in particular.

Recently this has resulted in the bankruptcy of Hanjin shipping

...as, although recent trend is for positive operating profits in

...ent quarters.

2017 recent demand has increased to major trade

...es, but vessel ordering is still great demand.
1. SFT Foam Filled Fenders. What is that?

- Fenders systems for dedicated berths.
- Made in Germany and the US from high density highly engineered design.
- Foamed 100% closed cell filament reinforced.
Number of lessons from cross industry perspective and from cross product experience.
Demands of shipping liners

- High performance level from terminals
- Throughput rate per berth
- Turnaround time of a vessel/external trucks

Consequently, terminals challenge with:

- Larger vessels
- Bigger piles
- Taller cranes
Figure – The new Container Terminal

Go-live Phase 2 Q1 2020
The world of Hutchison Ports
49 Ports in 26 Countries
From Italy To Hollywood, passing through Malta: in 2013 some scenes of "Captain Phillips" were shot in Malta Freeport Terminal, with the participation of our cranes as "Supporting Actresses".
All-in-one comprehensive solutions

- Integrated VBS
- Combined container and general cargo yard management
- MHE routing optimization
- Integrated terminal information
- Integrated resource planning
- Automated vessel cargo stowage planning
- Yard operation
Founded 2012
- € 315 mil. in sales
- 750 employees worldwide (01.01.2017)
- 12 VAHLE subsidiaries worldwide
  (VAHLE South-East Asia founded in 2008)
- Representations in 52 countries
- 100% family owned
- Production based in Germany

VAHLE
STROMZUFUHRUNGEN

Subsidiary
Representative
Almost 65 years since the initial idea became a patented solution
It's not easy being green

- Nitrous Oxide (NO$_x$)
- Particulate Matter
- Carbon Dioxide (CO$_2$)
We believe that the short sea shipping industry has still margin to growth due to the current trade area and all the rest of European countries.

Most of European economies are incorporating pre-crisis levels:

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<tbody>
<tr>
<td>UK</td>
<td>-2.5%</td>
<td>0.9%</td>
<td>2.2%</td>
<td>2.6%</td>
<td>3.2%</td>
<td>4.1%</td>
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<td>2.3%</td>
<td>2.5%</td>
<td>2.6%</td>
<td>2.8%</td>
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New markets could be developed due to growing economies:

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<thead>
<tr>
<th>Country</th>
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<td>MONACO</td>
<td>13.6 $</td>
<td>15.8 $</td>
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<td>ALGERIA</td>
<td>12.4 $</td>
<td>13.0 $</td>
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<tr>
<td>TUNISIA</td>
<td>12.2 $</td>
<td>12.5 $</td>
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Mario Massarotti
General Logistics Manager
Speech: Speaker
Trade Facilitation, Customs and Security Committee

- Created in 2014 in order to address those aspects of transport impacting on trade in terms of efficiency and costs linked to ports, border control and agencies.

- Main topics:
  - Systems performance in EU ports
  - Cargo (e.g., immigration)
  - Brexit