



Global and regional container trends and developments

Transport Middle East 2026 – Abu Dhabi

28th January 2026



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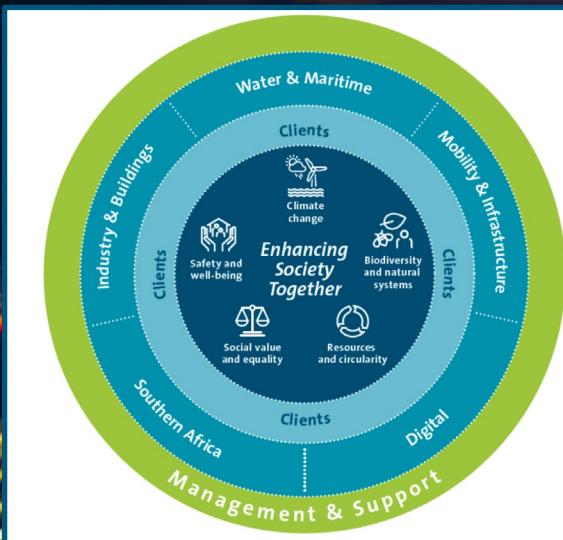
Introduction

Haskoning is an independent international engineering and project management consultancy. Ocean Shipping Consultants (OSC) is the maritime economics and financial consultancy arm of the company.

- Originally founded in 1881
- Over 140 years of experience
- Turnover €600m
- Deliver services in the fields of:
 - aviation,
 - buildings,
 - energy,
 - industry,
 - infrastructure,
 - maritime,
 - mining,
 - transport,
 - urban / rural development,
 - water.



- Ocean Shipping Consultants (OSC) is the maritime economics and financial consultancy arm of the company and is a leading brand in the maritime sector with over 35 years' experience.



Key projects in the region

Examples of recent projects in the region



Neom Port of Duba expansion - 2022

Neom is a new smart city being built in Northwestern Saudi Arabia. Port of Duba, as part of the development, will be expanded to accommodate the expected growth in volumes. Royal HaskoningDHV was contracted by Deloitte to make a review of the existing market study and produce an independent market assessment of the expected volumes and requirements of the port facilities.

Royal HaskoningDHV successfully completed the works and the analysis and projections were used as input into the Financial Model to support the Business Plan.



Port of Sohar Due Diligence - 2024

A global port investor is considering an acquisition of shares in the Vale berth and terminal operations in Sohar port, Oman. Haskoning was asked to perform a due diligence assessment, including a commercial, operational, technical and ESG workstream.

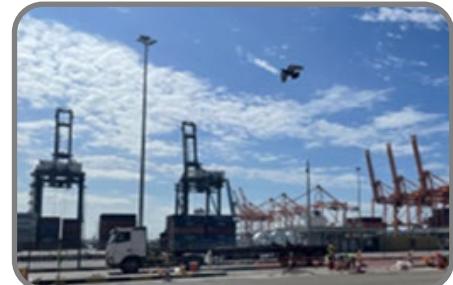
Haskoning combined experts from different disciplines to bring together the expertise required for this DD. The report was well received by the client, who entered into a joint venture partnership related to the Vale Oman Distribution Center.



UAE 10-Year Strategic Development Study – 2025

Abu Dhabi Ports (ADP) engaged Haskoning to conduct a comprehensive study on the current capacity, operational efficiency, and potential for expansion of ADP's key ports in the UAE, specifically Khalifa Port, Mina Zayed, Freeport, Mugharraq Port, and Fujairah Terminal. The study aimed to support ADP's long-term growth vision and economic goals.

The final report provided ADP with actionable insights and recommendations to enhance port operations, accommodate future growth, and improve competitiveness both regionally and globally.



Transaction Advisory PPP (BOT) Port Terminal Bids - 2025

Red Sea Gateway Terminal, an international port and terminal operating company, aims to acquire four concessions in KSA. Haskoning provided financial and commercial advisory services to support the client in its bidding process. This included delivering market forecasts, preparing bid documentation and structuring a detailed financial model to assess the four investment opportunities, substantiate the bids and enable the arranging of required financing.

The support enabled the client to submit a fully compliant bid for four terminals.

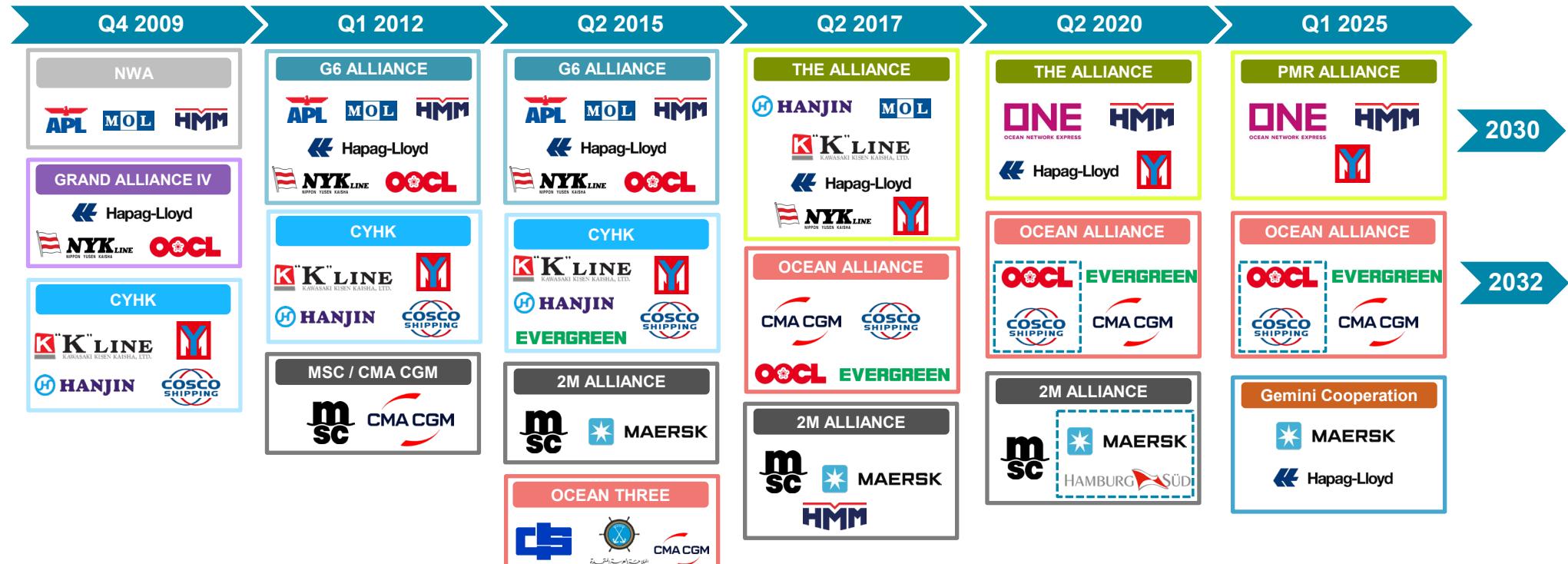
Major events shaping the shipping industry

A few key major events and forces shaping the shipping industry today and steering its future trajectory

Key events	Context	Impact on shipping
Stricter IMO Emission Regulations	IMO Carbon Intensity Indicator and related rules are tightening	Shipowners pushed towards cleaner fuels, retrofits, and new vessel designs
Green Shipping Corridors	Major ports are establishing zero-emission trade routes	Accelerates investment in alternative fuels
Geopolitical Tensions & Route Disruption	Conflicts and strategic chokepoint instability (e.g., Red Sea, Middle East instability)	Increase the need for diversified logistics and more resilient supply chains
Digitalization & Autonomous Shipping	Expansion of autonomous vessel pilots and AI-driven fleet	New competitive differentiator for safety, efficiency, and cost control
Fleet Renewal Constraints & Shipyard Capacity Limits	Global shipyard slots are tight	Transition to greener fleets slowing down, impact on freight rates and market cycles
Ageing Global Fleet & Need for Modernisation	Many vessels are nearing end-of-life just as environmental standards rise	Creates pressure for accelerated scrapping and newbuild investment

Global container shipping sector

The shipping industry has consolidated through alliances and M&A to improve vessel utilization and sea freight rates and enables liners to bundle their routes to offer a wider global network. Since 2015 all main carriers have been part of an alliance. The 2M Alliance was discontinued in January 2025, with Maersk switching to the Gemini Cooperation. The OCEAN and PMR Alliance run until 2032 and 2030.



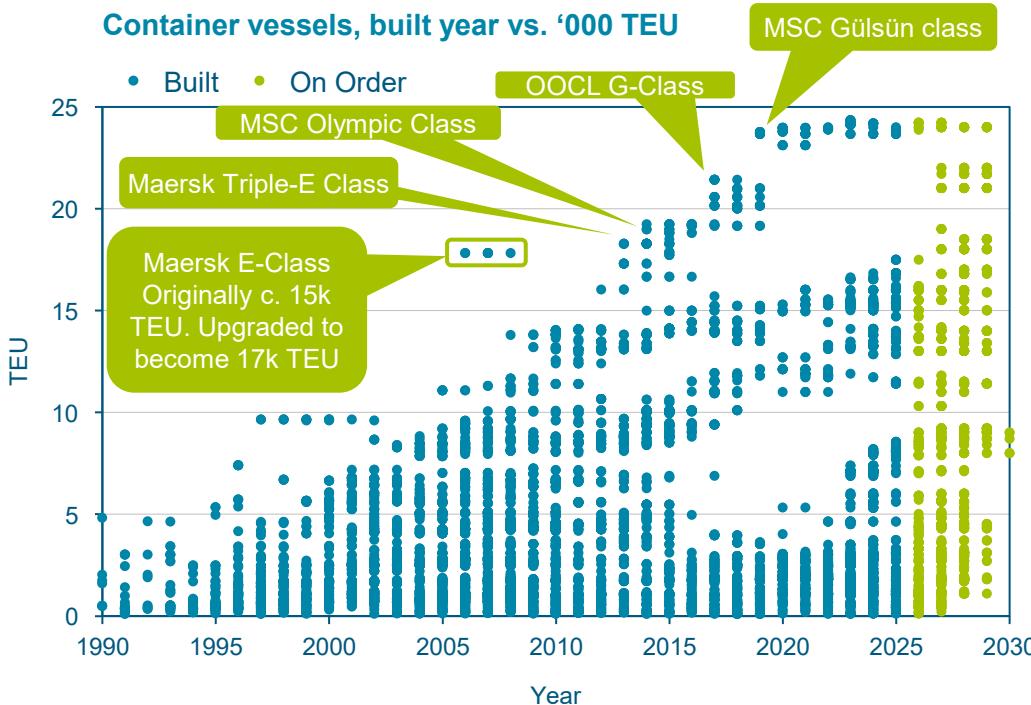
Main Carriers Not Part of an Alliance



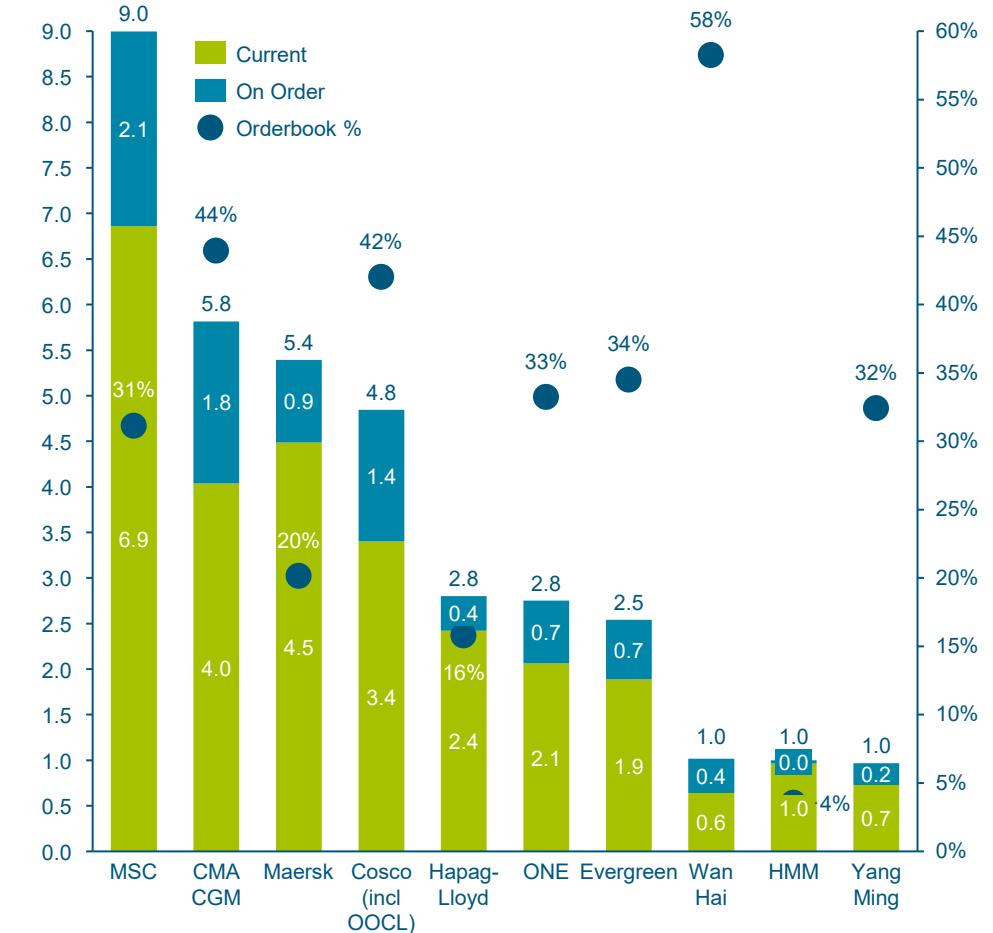
Source: Haskoning

The orderbook of most major shipping lines is leaning towards large ULCV.

- MSC's 7 million TEU vessel capacity or 9 million TEU including orderbooks → largest liner in the market.
- CMA CGM, which has 5.8 million TEU capacity in 2nd place
- Cosco has a large orderbook and announced that they ordered 12x 18,000 TEU LNG-capable ships in Jan 2026



Top 10 liners vessel capacity split by current and on order (million TEU)

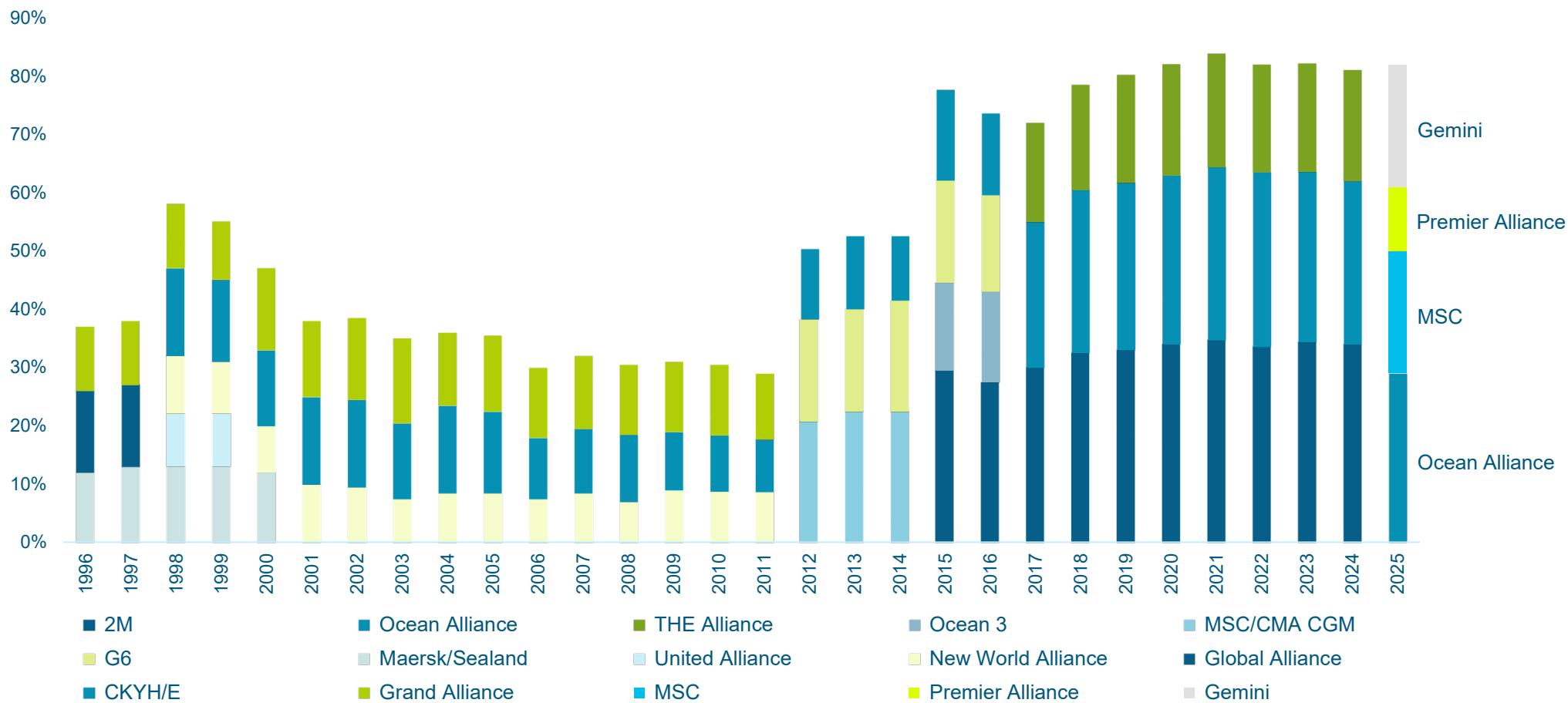


Source: Clarkson, eeSea

Global container shipping sector

The upscaling of alliances in the shipping sector led to very quick growth of the combined market share of the three largest alliances, from less than 30% in 2011 to over 80% in 2024. Alliances changed in January 2025, with Maersk and Hapag-Lloyd forming Gemini, while MSC is no longer in an alliance.

Development of the combined market shares of the three largest shipping alliances 1996-2021

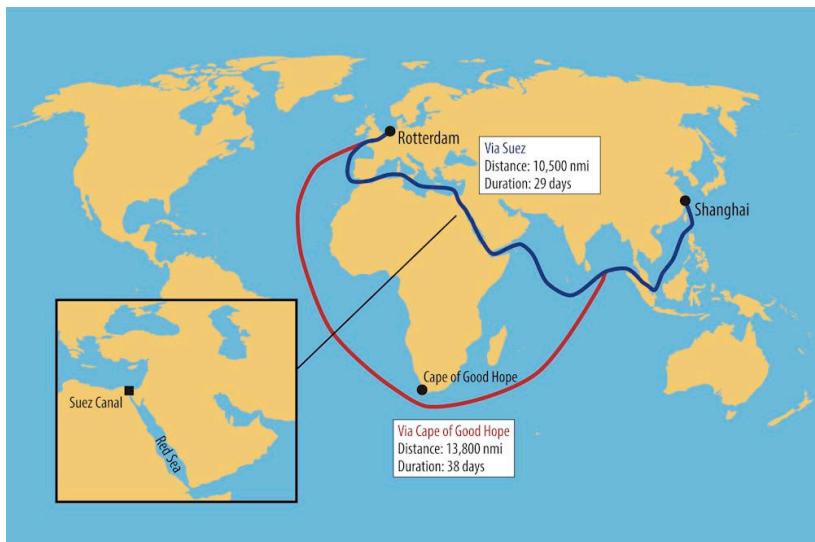


Source: Alphaliner, Clarksons

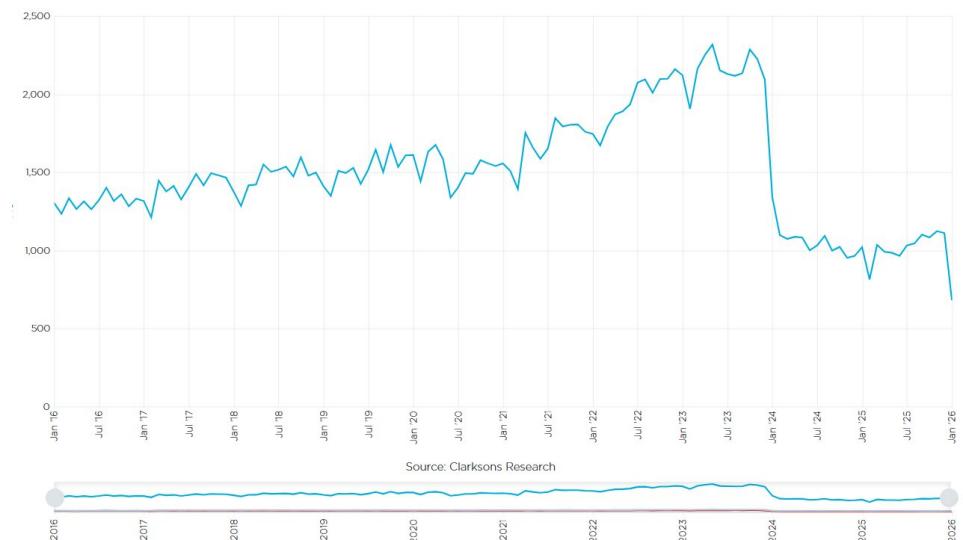
Key regional impact on shipping - Red Sea Crisis

The increased geopolitical uncertainty in the Red Sea has affected international trade routes, freight rates and insurance premiums.

- The conflict in the Middle East, driven by continuous attacks by Yemen's Houthis on ships, is re-shaping international trade routes at sea.
- From December 15th, 2023, A.P Moller-Maersk has announced diversions in their routes while Hapag-Lloyd also decided to stop sailing through the Suez Canal and reach European ports via Cape of Good Hope.
- Container traffic has plummeted by over 60%, resulting in increased shipping costs from additional fuel expenses and insurance due to the longer travel.
- Freight rates have not yet recovered their long-term historical average levels.



Monthly number of ship transit in the Suez Canal



China-Europe Container Freight Rate Index

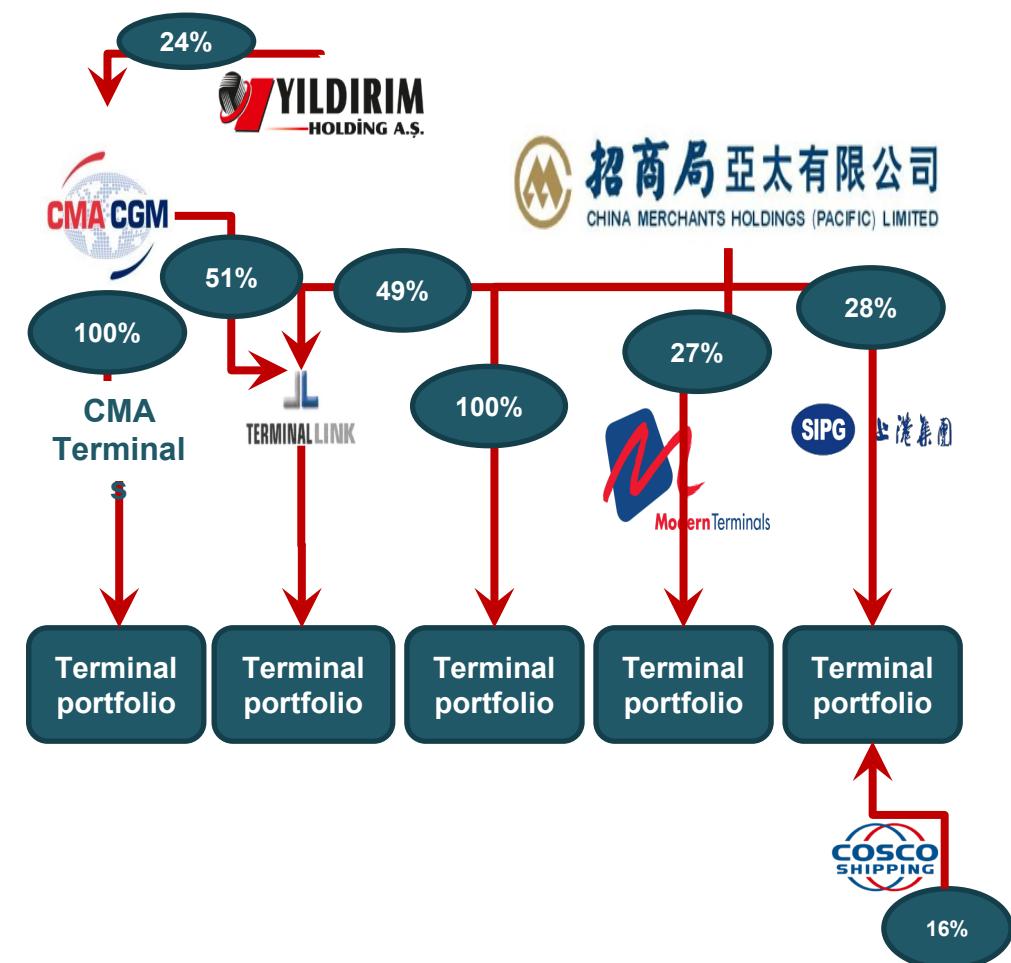


Source: Clarksons

Container port & terminals sector

Port operators have responded by forming alliances, partnering with shipping lines, acquiring or merging with competitors.
This has created a significantly complex ownership structure.

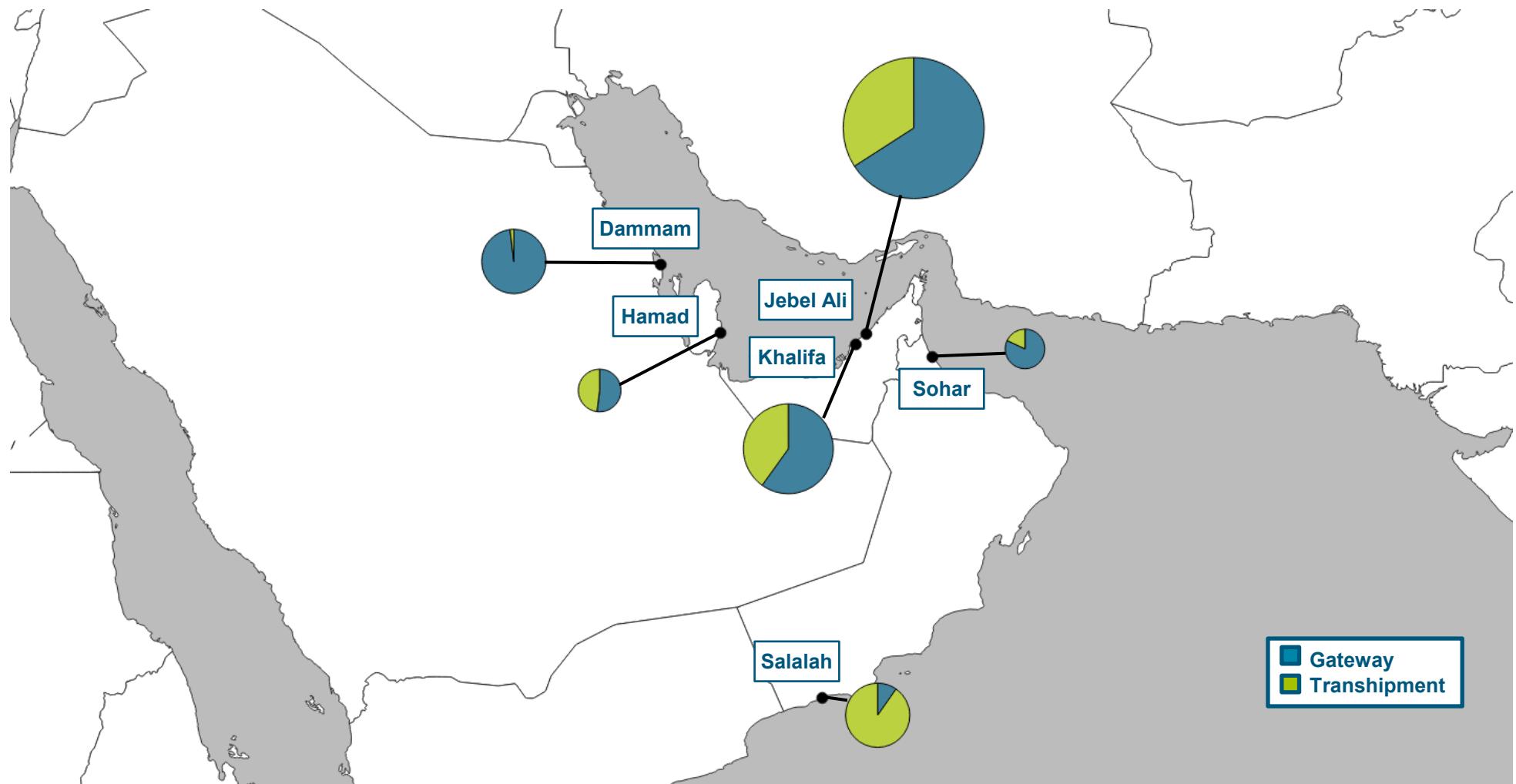
Rank	Rank	Operator	Volumes (TEUm)			CAGR	2024 Share %
			2016	2024			
1	1	PSA	52.4	63.4	3.2%	6.8%	
5	2	Cosco	29.1	54	10.9%	5.8%	
6	3	China Merchant	27.9	51	10.6%	5.4%	
4	4	APM Terminals	37.3	48	4.3%	5.1%	
3	5	DP World	40	47.4	2.9%	5.1%	
2	6	Hutchison Ports	45.6	43.7	-0.7%	4.7%	
-	7	MSC/TiL	-	42	-	4.5%	
8	8	ICTSI	7.9	12.2	7.5%	1.3%	
14	9	CMA-CGM	5.1	10.1	12.1%	1.1%	
-	10	SSA Marine	-	8.7	-	0.9%	
Top 10 volumes		245.3	380.5	7.6%			
Top 10 share		34%	41%	2.8%	41.6%		
Global Port volumes		713.7	937	4.6%			



Regional port competition

Transhipment volumes are concentrated in Jebel Ali, Khalifa Port and Salalah, which together handle over 90% of the transhipment volumes in the region.

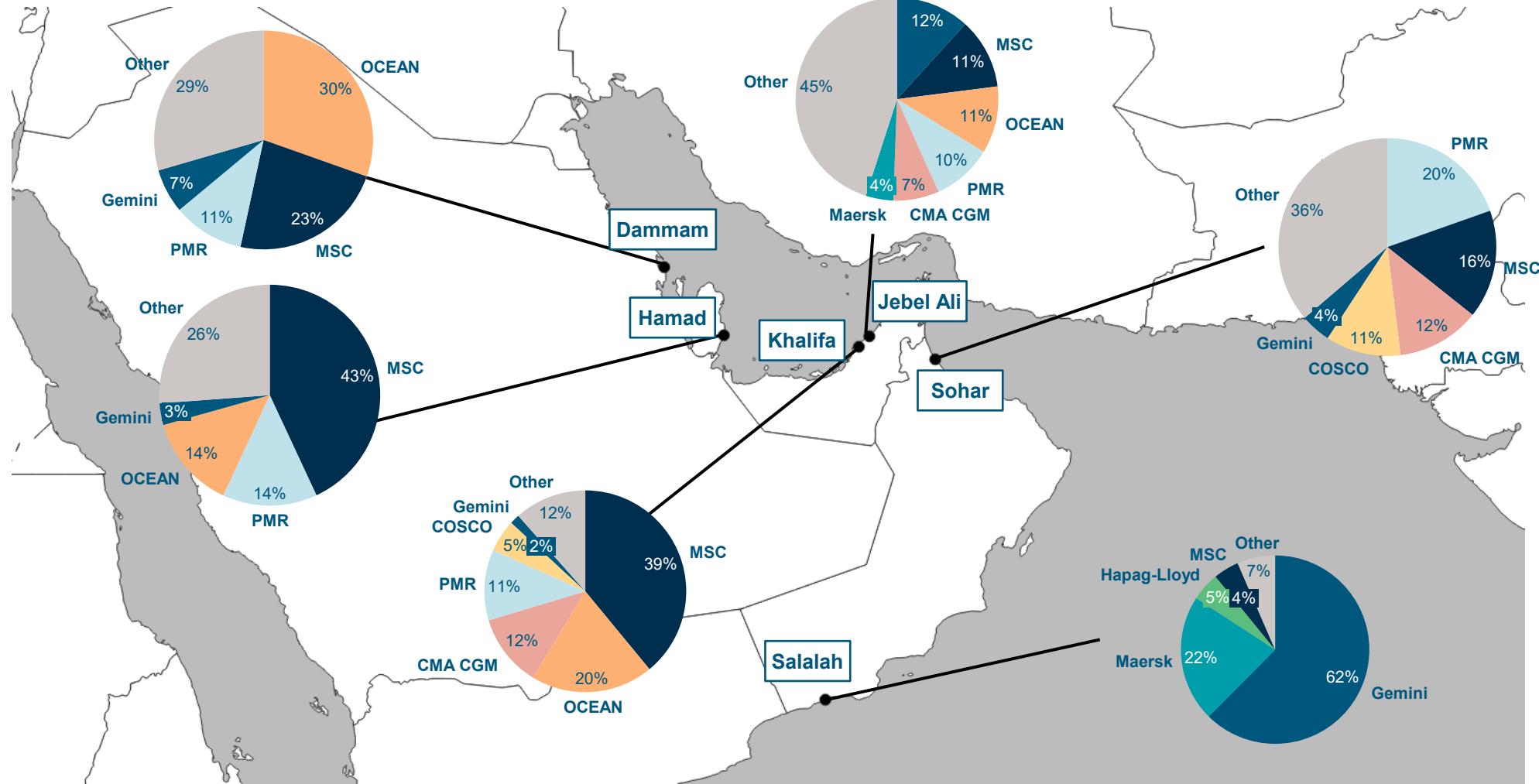
Main regional ports



Regional port competition

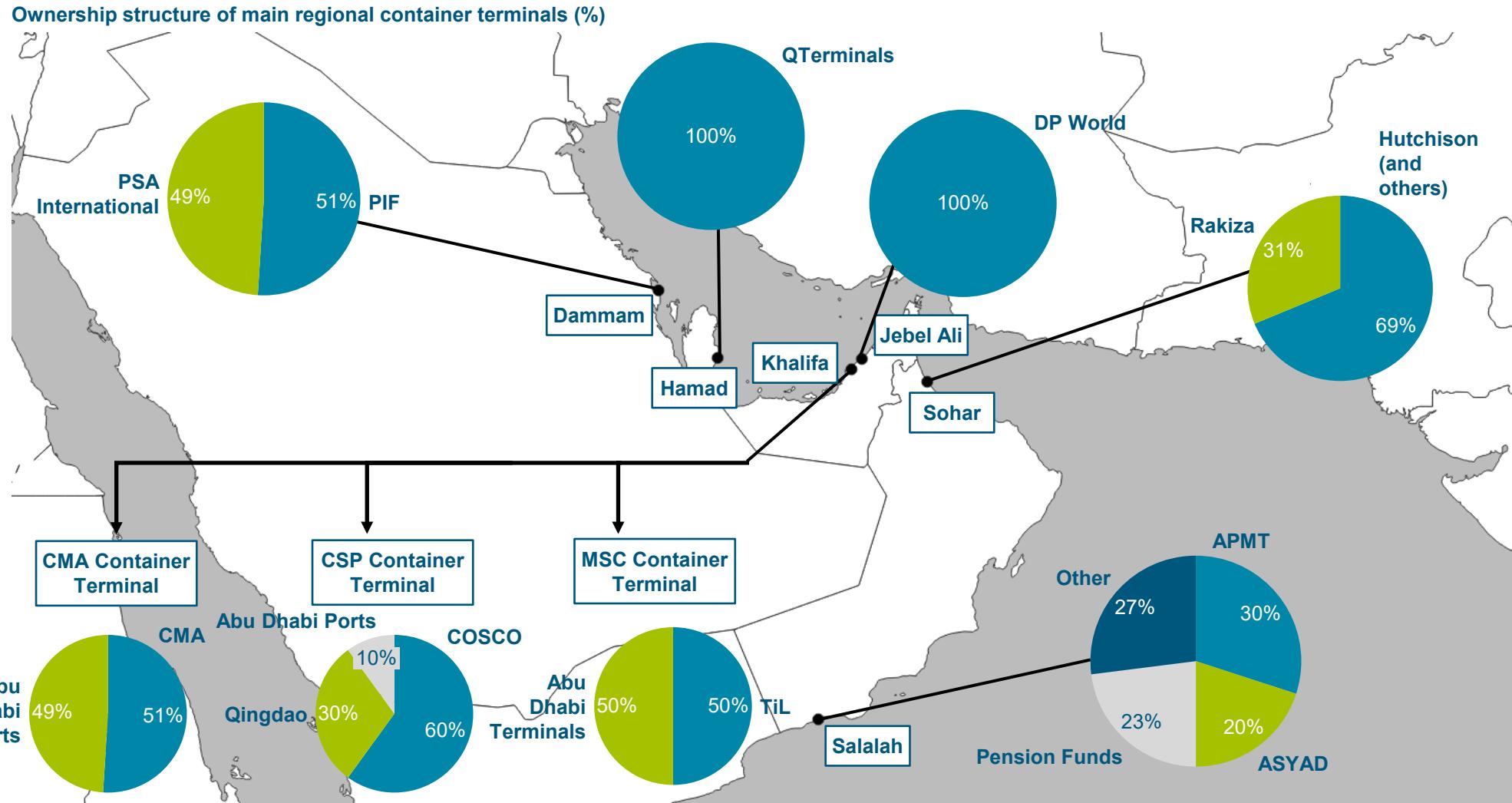
MSC deploys the highest weekly capacity in the region. All three alliances have a big presence in the region. The other largest independent shipping services are from CMA CGM, Maersk and COSCO.

Market share per shipping lines (%)



Regional port competition

All major global terminal operators have an equity investment in a terminal in the region. Hamad, Jebel Ali and Sohar are operated by global terminal operator not linked to any major shipping line.

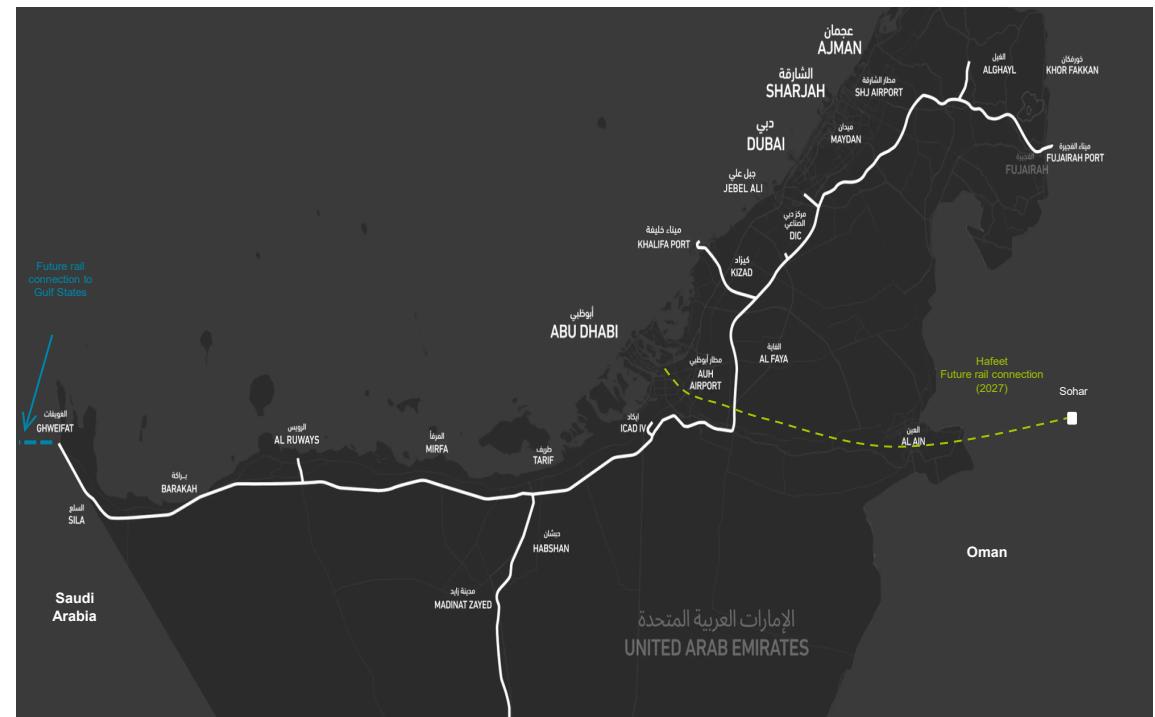


Key UAE economic drivers - Rail network development

Etihad Rail operates and maintains the UAE's freight rail network. Plans are in place to connect the network to Oman and other Gulf states. Rail has the potential to shift the logistics routes of major bulk commodities and containers.

- UAE rail network primarily runs along the coast from Ghweifat in the west to Fujairah in the east. It connects to major ports and industrial areas across the UAE including Khalifa Port, ICAD, KEZAD, Fujairah (Terminals) and Jebel Ali.
- Etihad Rail operates and maintains the rail network. Established in 2009, the state-owned company is the only freight rail operator in the UAE and has the ambition of moving 60m tons by 2030.
- The network is not yet connected to neighbouring countries; however, there are plans to establish connections.
- **Oman:** A new 303km rail connection between Abu Dhabi and Sohar via Al Ain called Hafeet Rail is being developed. Engineering works have commenced, and financing has been secured for the project which is expected to be completed late 2027.
- **Gulf States:** There are plans to expand freight rail along the Gulf under an initiative known as Gulf Railway. This would connect the UAE, Saudi Arabia, Qatar, Bahrain and Kuwait. Additionally, plans exist to connect the UAE via rail.

- India-Middle East-Europe Corridor (IMEC) is a ship-to-rail transit network planned to supplement existing maritime and road transport routes and build a strategic economic alliance. The planned corridor includes rail connections through the UAE, Oman, Saudi Arabia, Jordan and Israel to connect the Gulf to the Mediterranean.



Etihad Rail Route

Source: Etihad Rail

Key UAE economic drivers – Economic Vision

The UAE has an ambitious economic vision to advance through diversification and investment into science and technology industries of the future. Abu Dhabi's Economic Vision 2030 complements the UAE Vision and identifies key growth sectors in which to focus resources.

'We the UAE 2031'

This turns the UAE's national vision into measurable targets that all institutions can deliver against. It is structured around four priorities:

- **Forward Society:** social empowerment for all
- **Forward Economy:** diversification into future growth sectors
- **Forward Diplomacy:** stronger global influence and a bridge for trade
- **Forward Ecosystem:** advanced, connected infrastructure and technology

Under **Forward Economy**, the UAE aims to build a diversified economy, strengthening established industries while leading in future technology and science, advancing the digital economy, and accelerating the energy transition toward renewables.

Abu Dhabi Economic Vision 2030

This is a a roadmap for long-term economic growth, aligning policy and planning and engaging the private sector. It identifies 11 growth sectors; those most relevant to ports include:

- **Transport, trade & logistics**
- **Energy:** oil & gas, petrochemicals
- **Metals:** iron, steel, aluminium

Success measures / targets include:

- **Economic:** 7% growth to 2015 then 6% to 2030 with non-oil GDP to grow faster than the oil sector. **The Abu Dhabi Falcon Strategy** aims for non-oil growth CAGR 8-12% and non-oil productivity growth CAGR 5-9% in 2022-2040.
- **Implementation:** Five-year strategies with detailed plans and targets.
- **Infrastructure:** align infrastructure expansion projects, including ports, with goals for growth in key sectors, and embed sustainability.

The UAE's Future Roadmap – Relevant Strategies and Plans



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*Thank
You!*