

Improving Supply Chain Resilience: Adapting to Global Geopolitical and Economic Challenges

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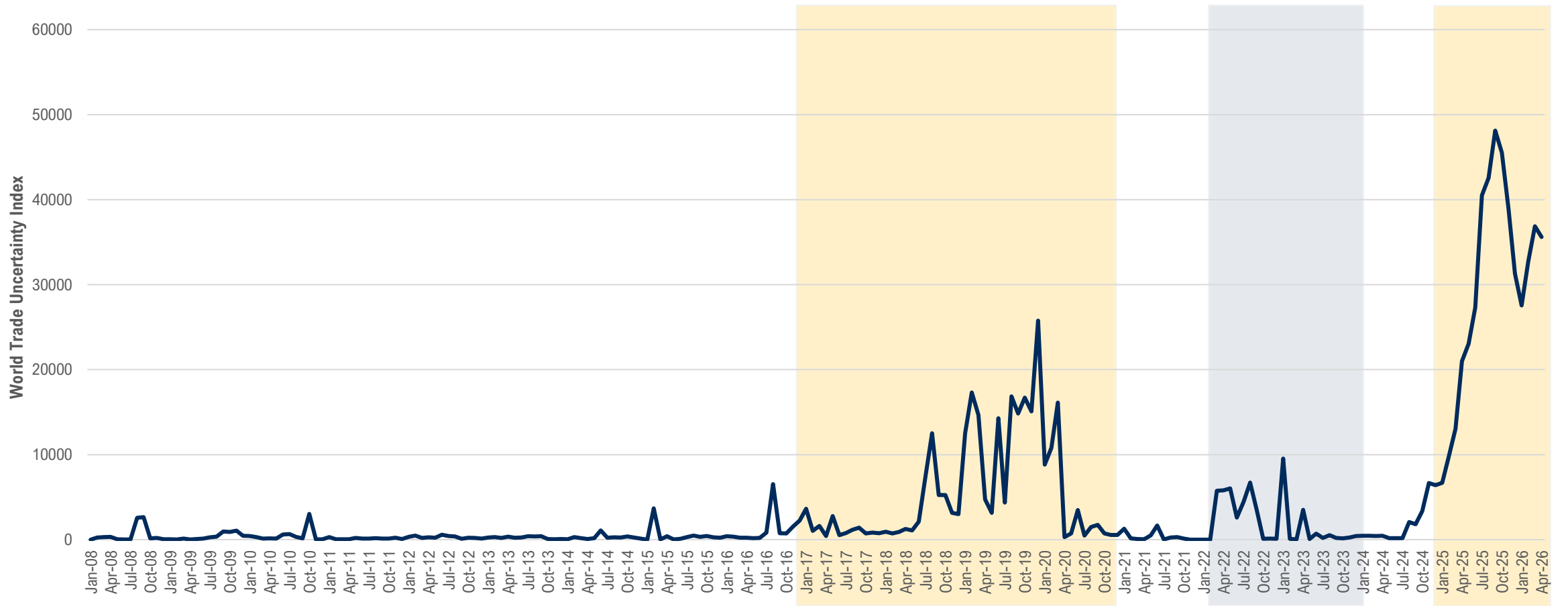


AGENDA

1. Volatility is now structural
2. Re-engineering of global trade
3. Structural dependencies are vulnerabilities
4. Key Challenges and The Way Forward

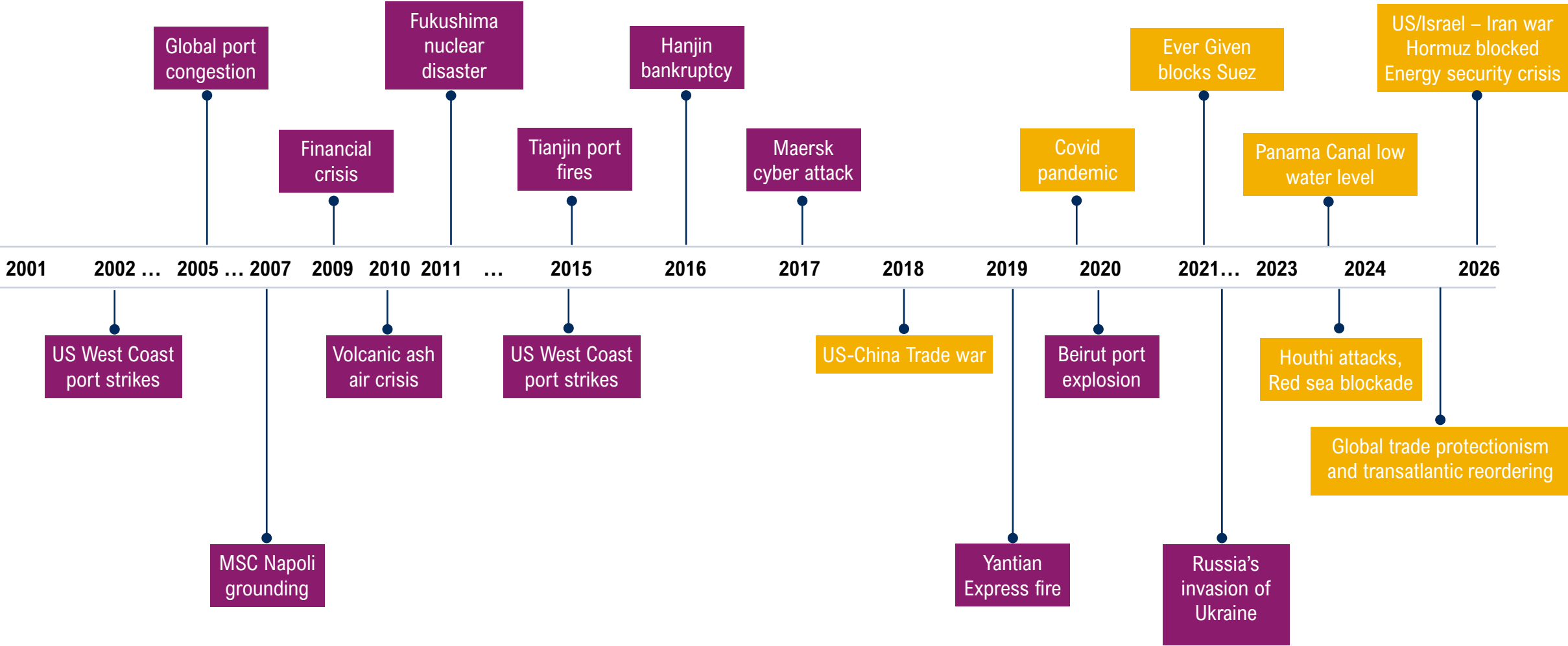


Elevated Risk and Uncertainty



2017-2020: Trump's inauguration and uncertainty about U.S. foreign policy
 Jan2020-May 2023: COVID
 February 2022, Russia invaded Ukraine
 2025 onwards: Trump's inauguration and radical uncertainty about U.S. foreign policy

Supply chain disruption



Rewiring of global trade

Geopolitical conflict

Middle East war - Hormuz disruption, energy security crisis, Red sea disruption

Russia-Ukraine/NATO conflict — Baltic / Black Sea constraint

Geopolitical competition

Structural dependency - Trade protectionism & tariffs

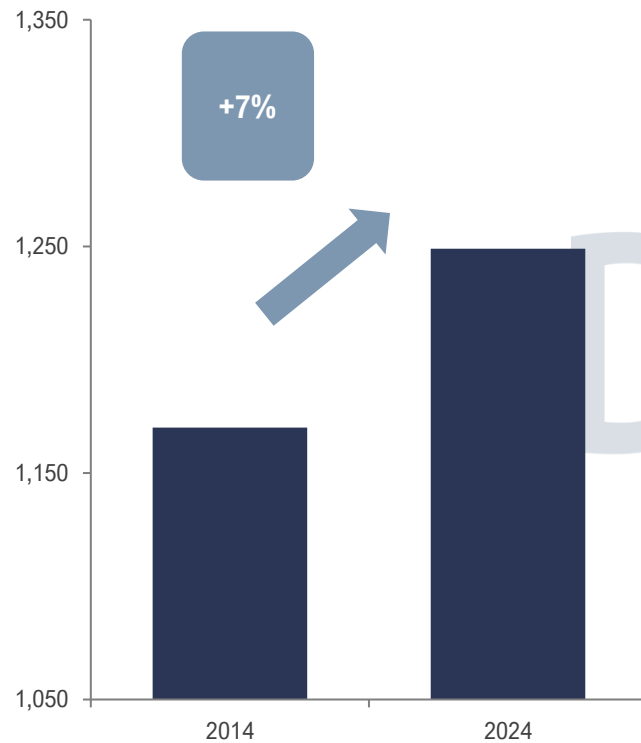
Structural dependency – Technology decoupling

Global performance benchmarks, 2014-2024

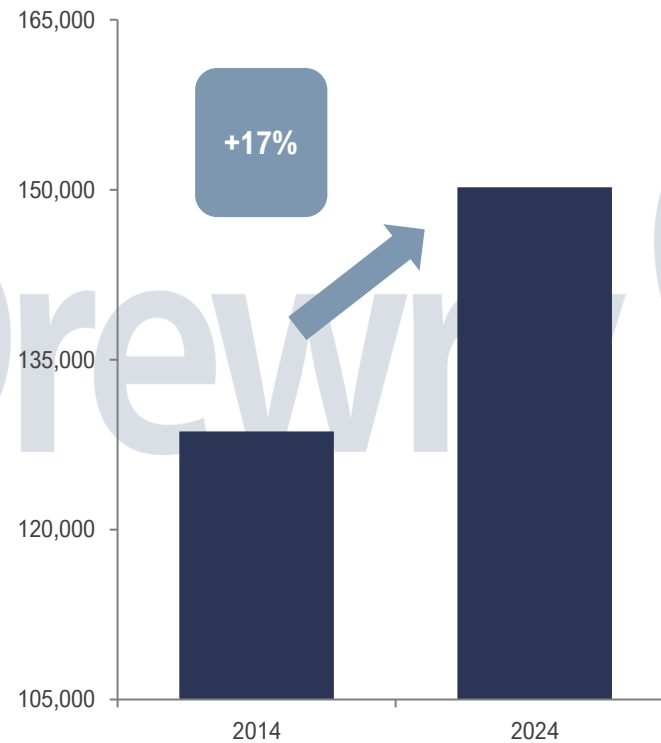
Technological improvements have increased the intensity of asset use at container terminals over the past decade.

Will it impact ability to cope with increasing levels of volatility and uncertainties?

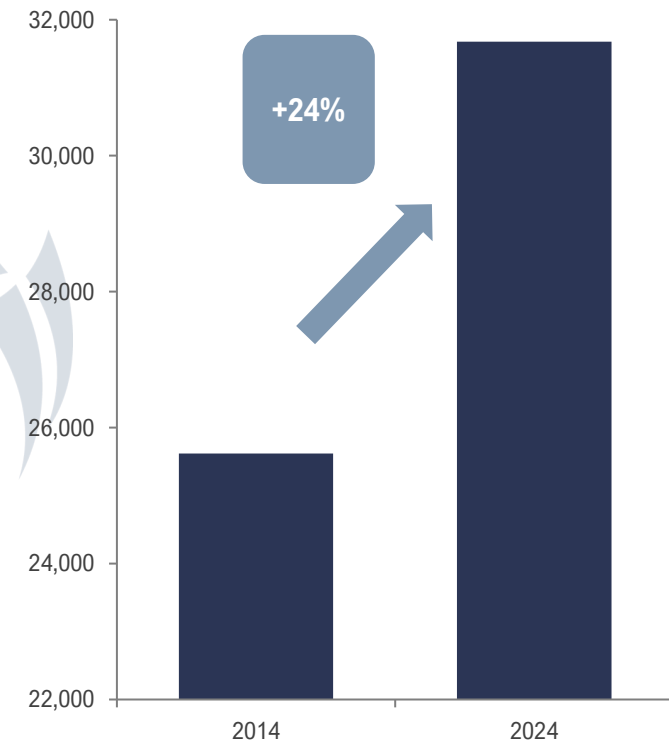
Berth performance
(teu per metre of quay)



Crane performance
(teu per STS crane)



Yard performance
(teu per hectare)



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The background of the slide is a grayscale photograph of a port at night. Several large gantry cranes are visible on the left, with their lights reflecting on the water. In the distance, a city skyline with illuminated buildings is visible under a cloudy night sky.

Thank you



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Drewry Maritime Advisors

Drewry Maritime Advisors provide expert advice to owners, operators, financial institutions, port authorities, terminal operators and governments covering the full spectrum of commercial and technical facets across all maritime and shipping sectors. Our combination of deep knowledge and understanding of the market sectors we serve, allows our clients to make the right commercial decisions at the right time.

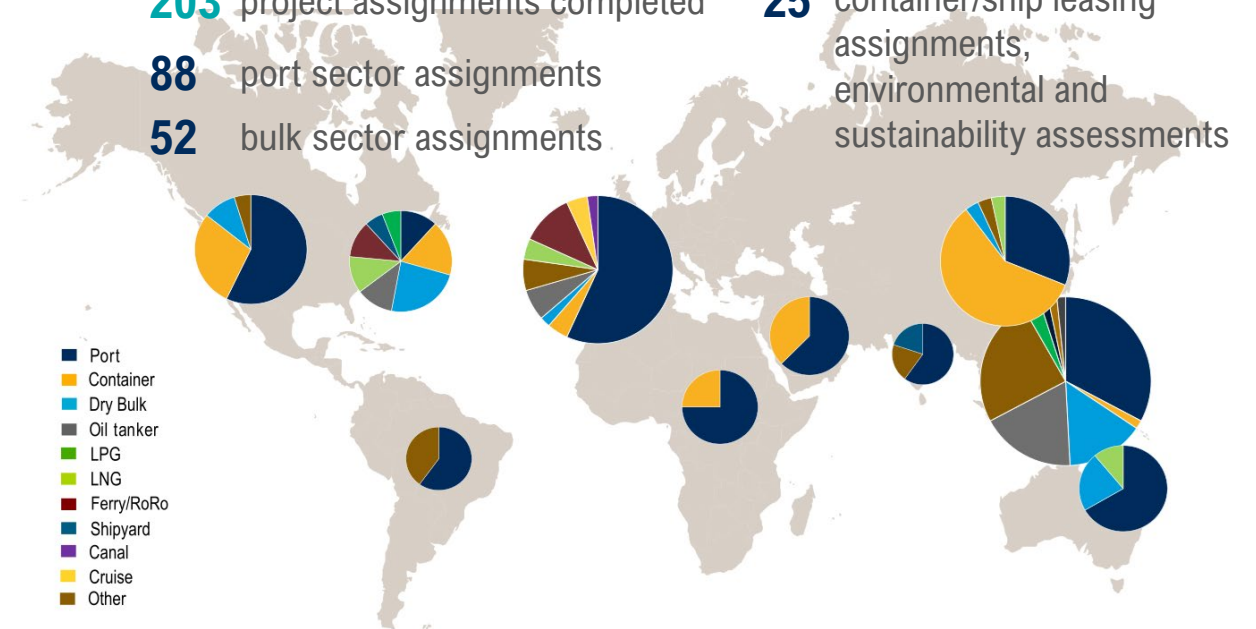


Project assignments (Jan 2021-Dec 2022)

203 project assignments completed **25** container/ship leasing assignments, environmental and sustainability assessments

88 port sector assignments

52 bulk sector assignments



Whether commissioning our advisory team to provide strategic analysis, commercial due diligence or market analysis, you can rely on our independence and rigour to provide sound professional advice. We can provide an in-depth assessment of the characteristics, dynamics and trends of your market, conduct customer analysis or evaluate its competitive environment to help you overcome challenges or realise asset opportunities.



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