



WORLD SHIPPING COUNCIL
PARTNERS IN TRADE

Shifting International Trade Routes

Tampa, Florida - January 19, 2012





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About the Council

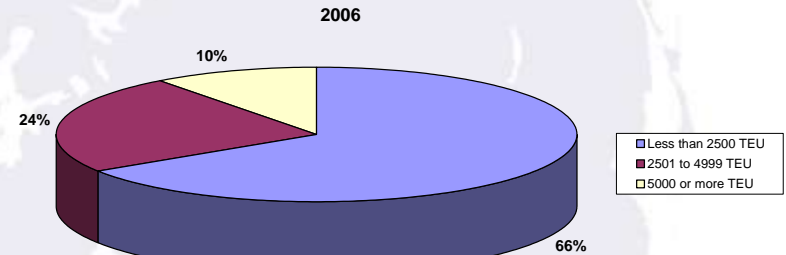
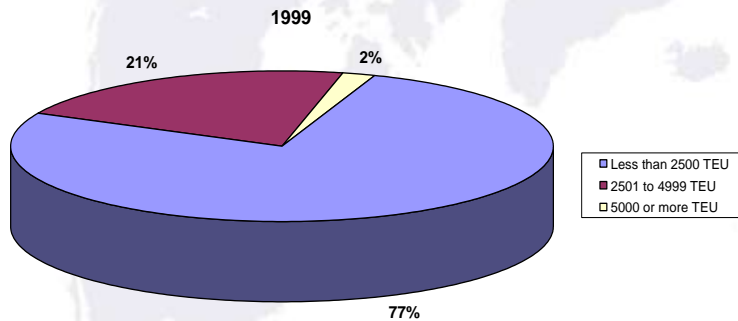
- **Coordinated voice for liner shipping on matters affecting public policy focused primarily on:**
 - Port and maritime security
 - Environmental impacts
 - Maritime transportation infrastructure
 - Cargo Liability Reform
 - Cargo Safety
- **Founded in 2000 in Washington, D.C.**
- **Opened Brussels office in 2007**
- **28 member companies**
 - **90% of global**
liner shipping capacity
 - **99% of US**
international container
trade



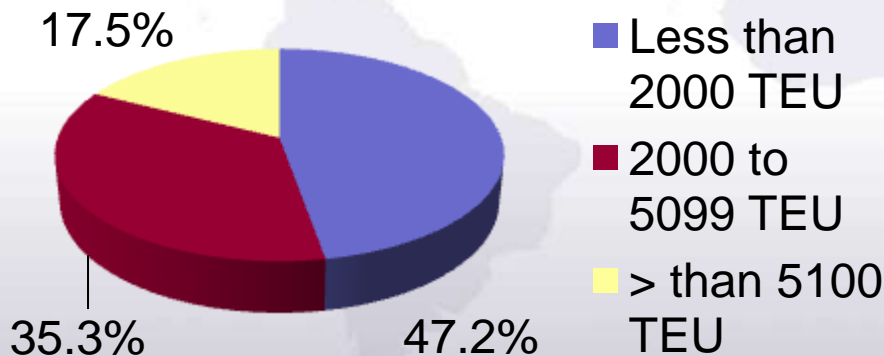
www.worldshipping.org



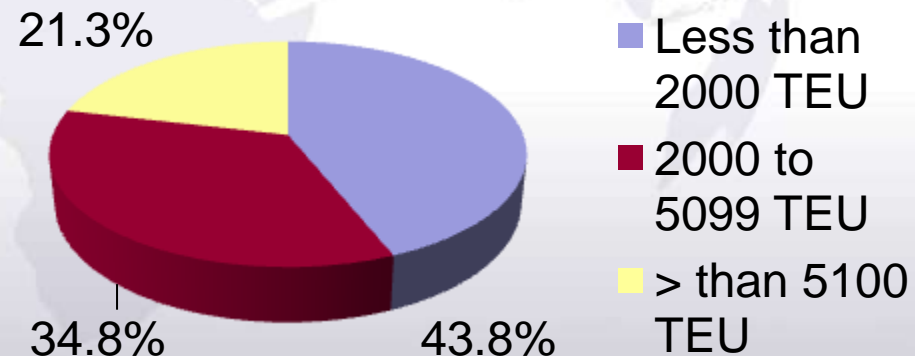
Fleet Composition



2011



2015



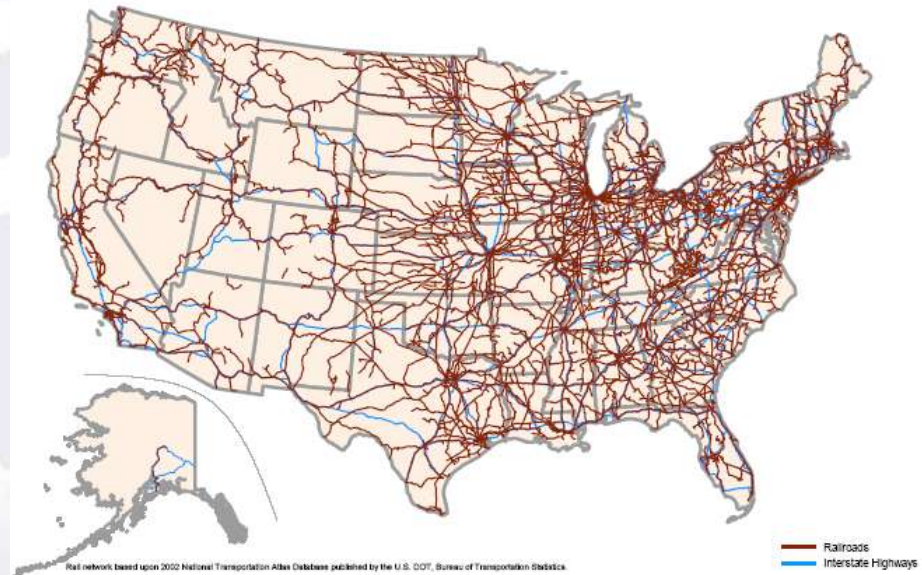
21% of ships = 52% of available capacity



Landside Connections

- **U.S. population to grow by 30% by 2050, with growth in the U.S. South up 43% by 2030***
 - New distribution and manufacturing facilities opening in East Coast and Gulf states
- **Container trades will continue to grow long-term**

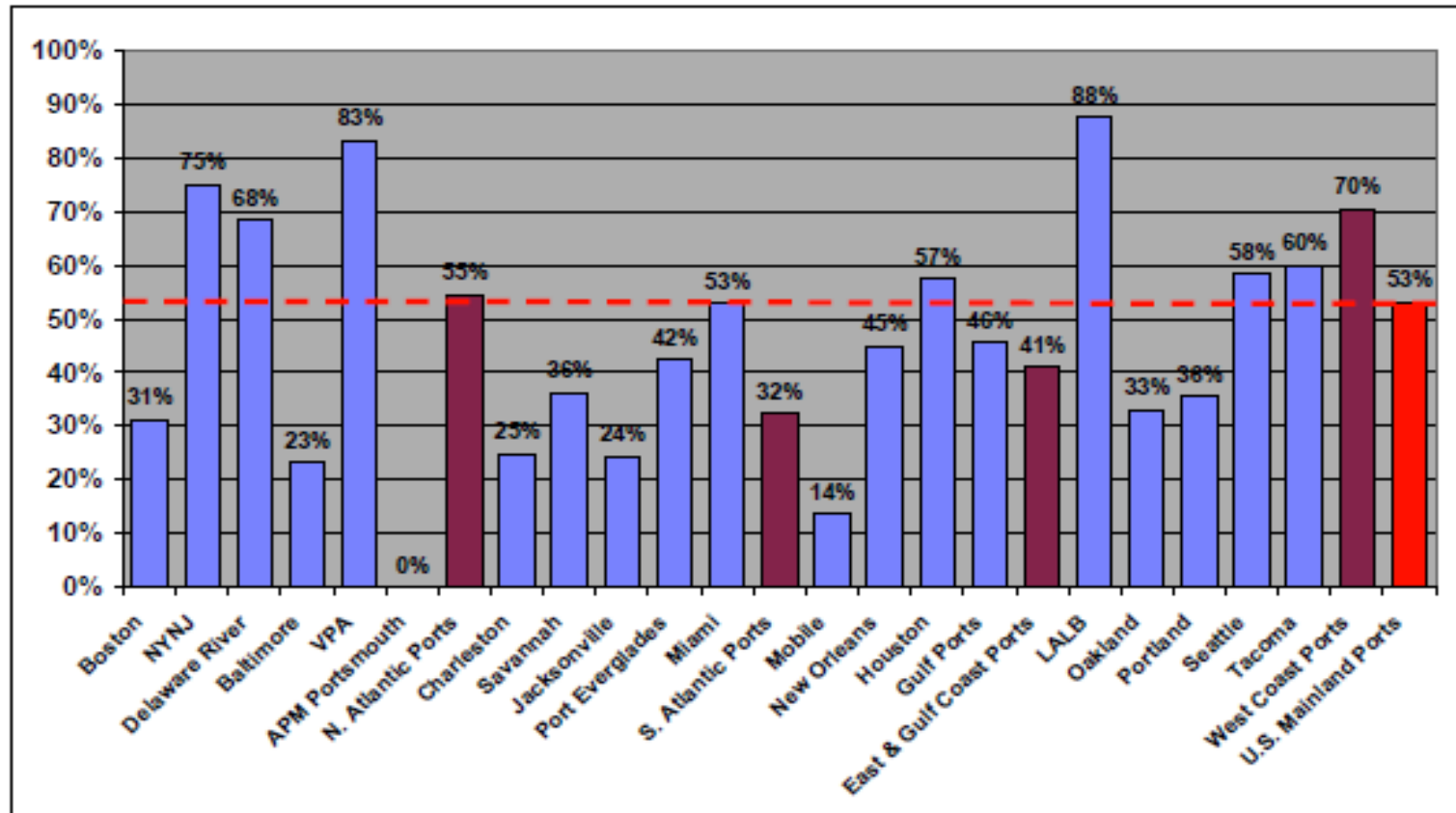
U.S. Road and Rail Network





Port Capacity Utilization

East coast and gulf ports collectively have more physical capacity to expand than west coast ports.

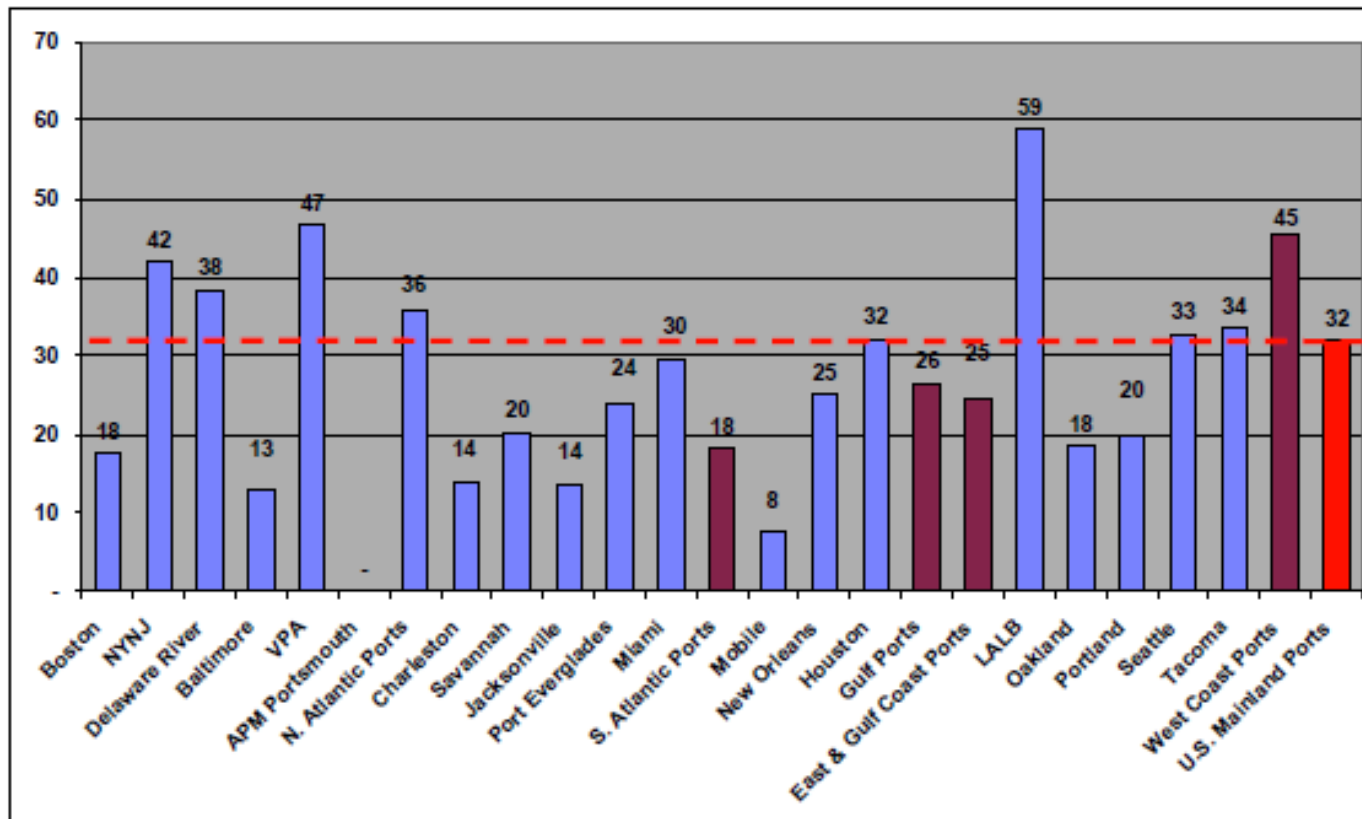




Key to long-term growth at ports: *Increased Productivity*

Productivity Metric Example

Exhibit 7: Annual TEU per Slot (Turns)





- **Ships will continue to get bigger**
- **Shippers and carriers need gateway (port) options**
 - Expanded Panama Canal increases the options
- **Container trade will continue to grow long-term**
- **Physical capacity expansion of ports has an upward limit**
- **Port productivity is key to ability to handle long-term container trade growth**



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Thank you.

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