

Shifting Trade Routes in the Automotive Sector

Tampa, January 23rd, 2014

Höegh Autoliners Profile:

Operates approximately 60 PCTCs in global trade systems

Carries about 2 M CEUs annually

Makes about 3.500 port calls annually

20 offices globally in 4 regions

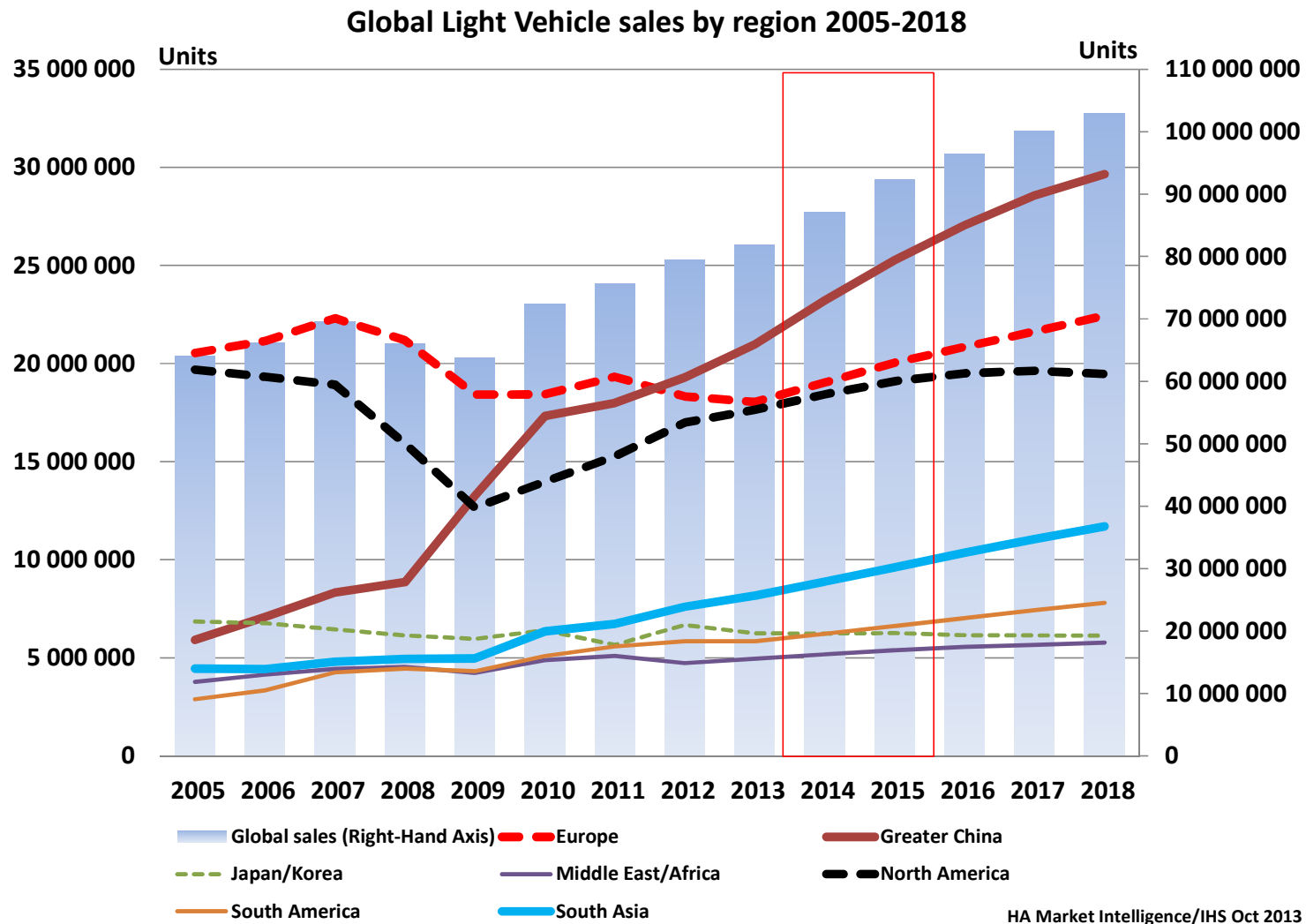
Region Americas is headquartered in Jacksonville, FL

Main customers are Auto manufacturers, High & Heavy Equipment manufacturers and Project shippers



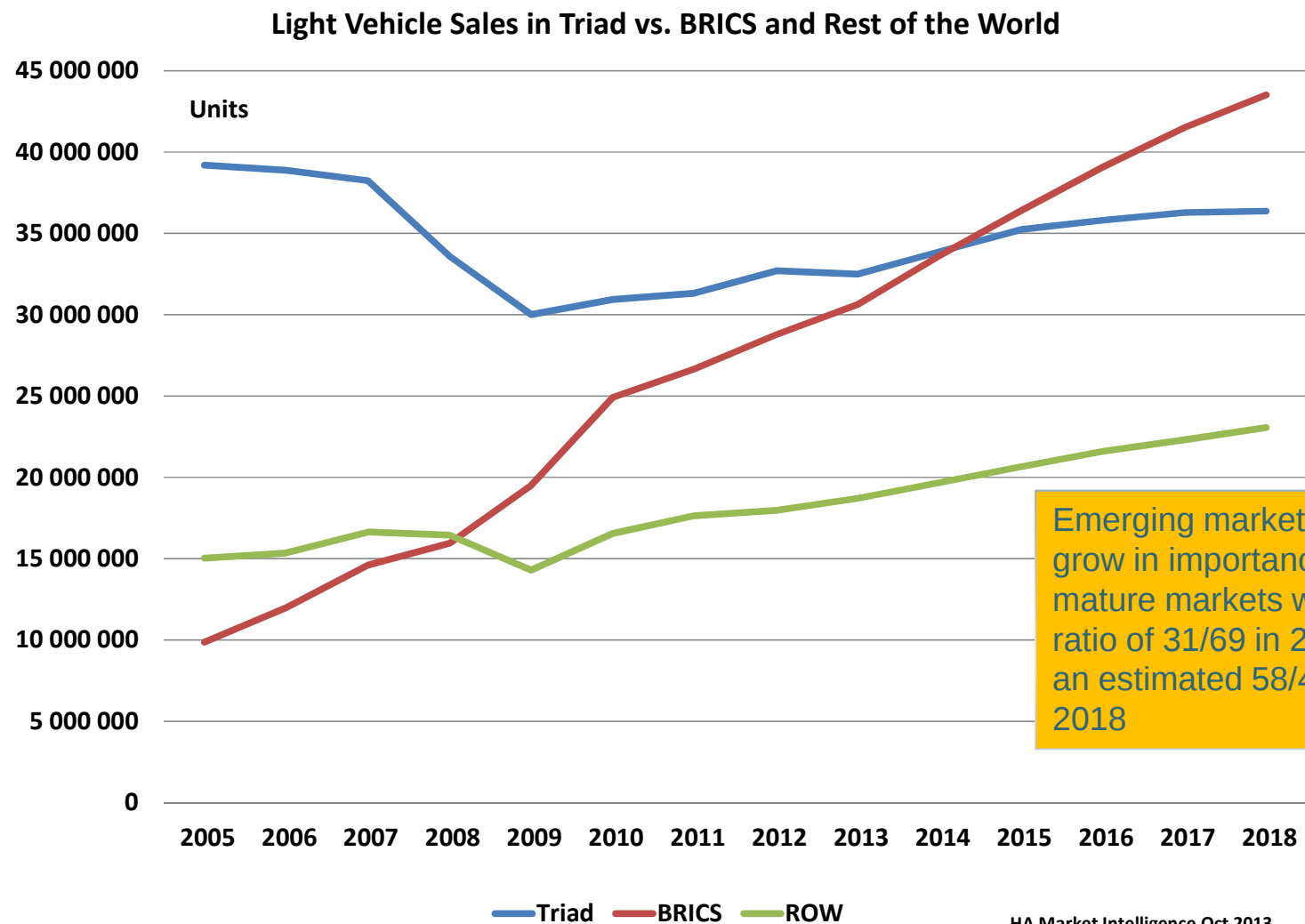
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Global light vehicle sales will pass 100 Million units by 2018



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Moderate sales in the Triad vs rapidly growing BRICS

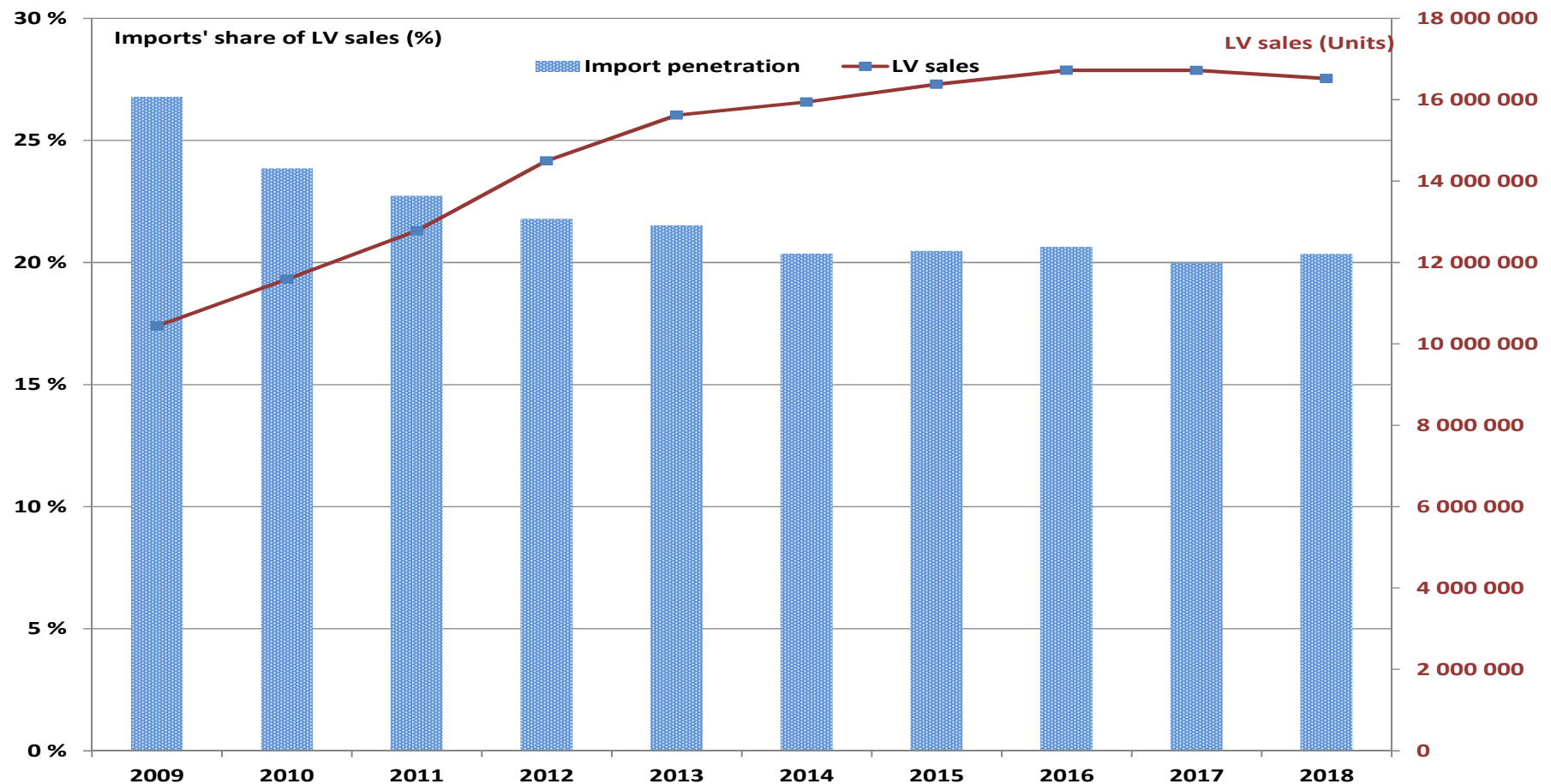


Triad: USA, W. Europe, Japan



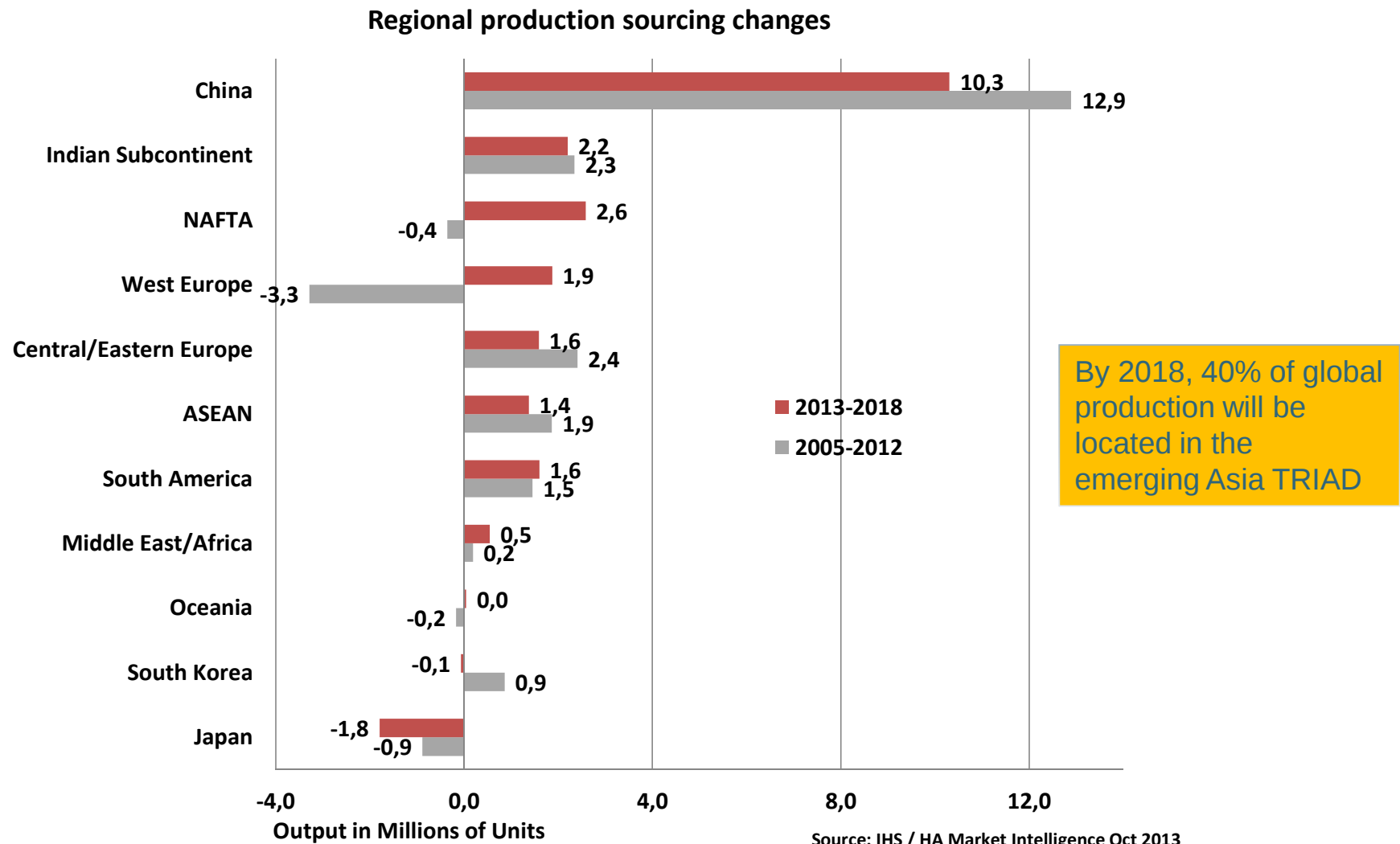
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U.S. market growth to return to 1-2% CAGR between 2013 and 2018; Import penetration to stabilize at 20%



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Automotive landscape in transition; 14m units of production will be added in the «Emerging Asia TRIAD» in 2013-2018



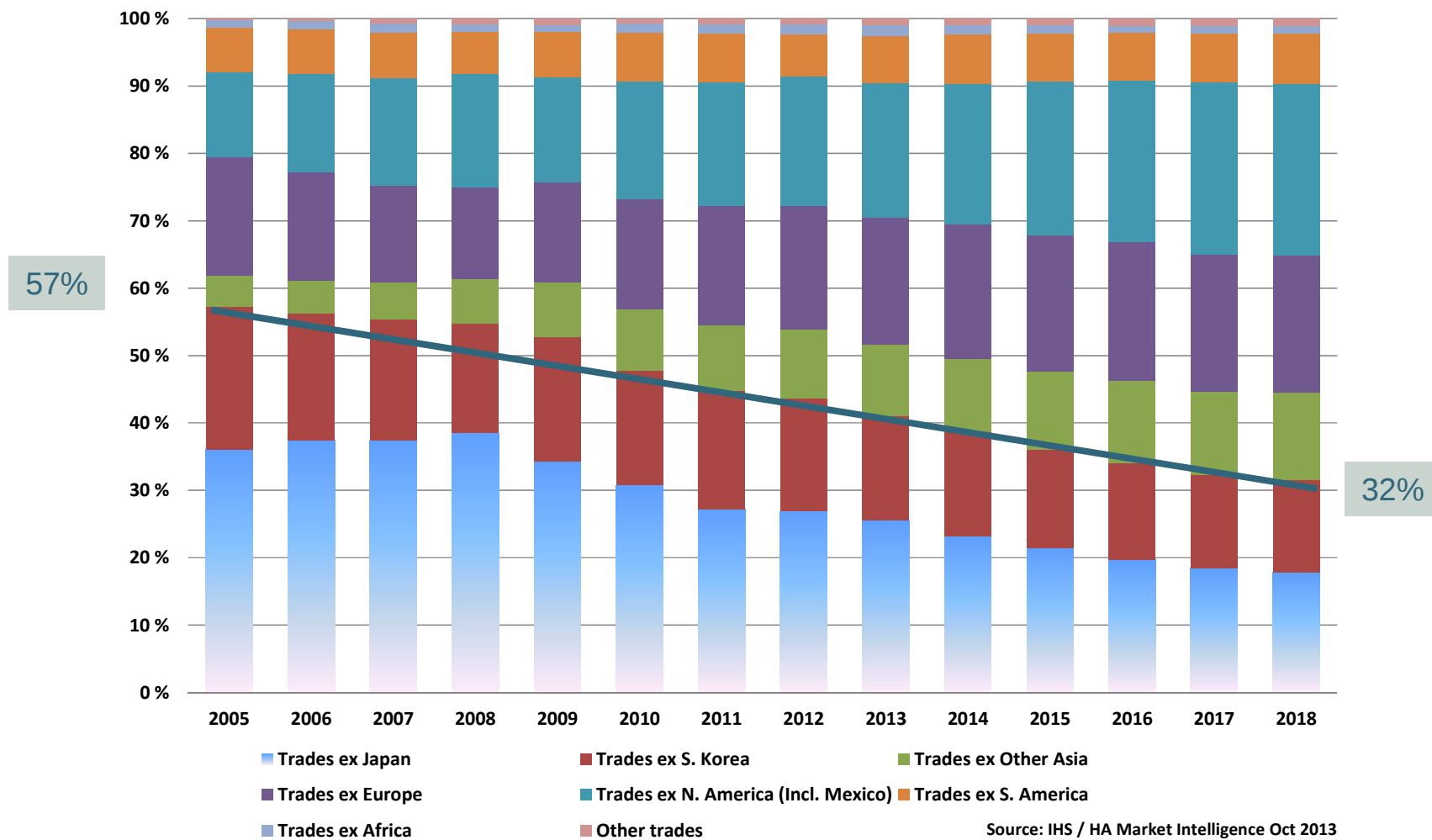
Emerging Asia TRIAD = China, India, ASEAN



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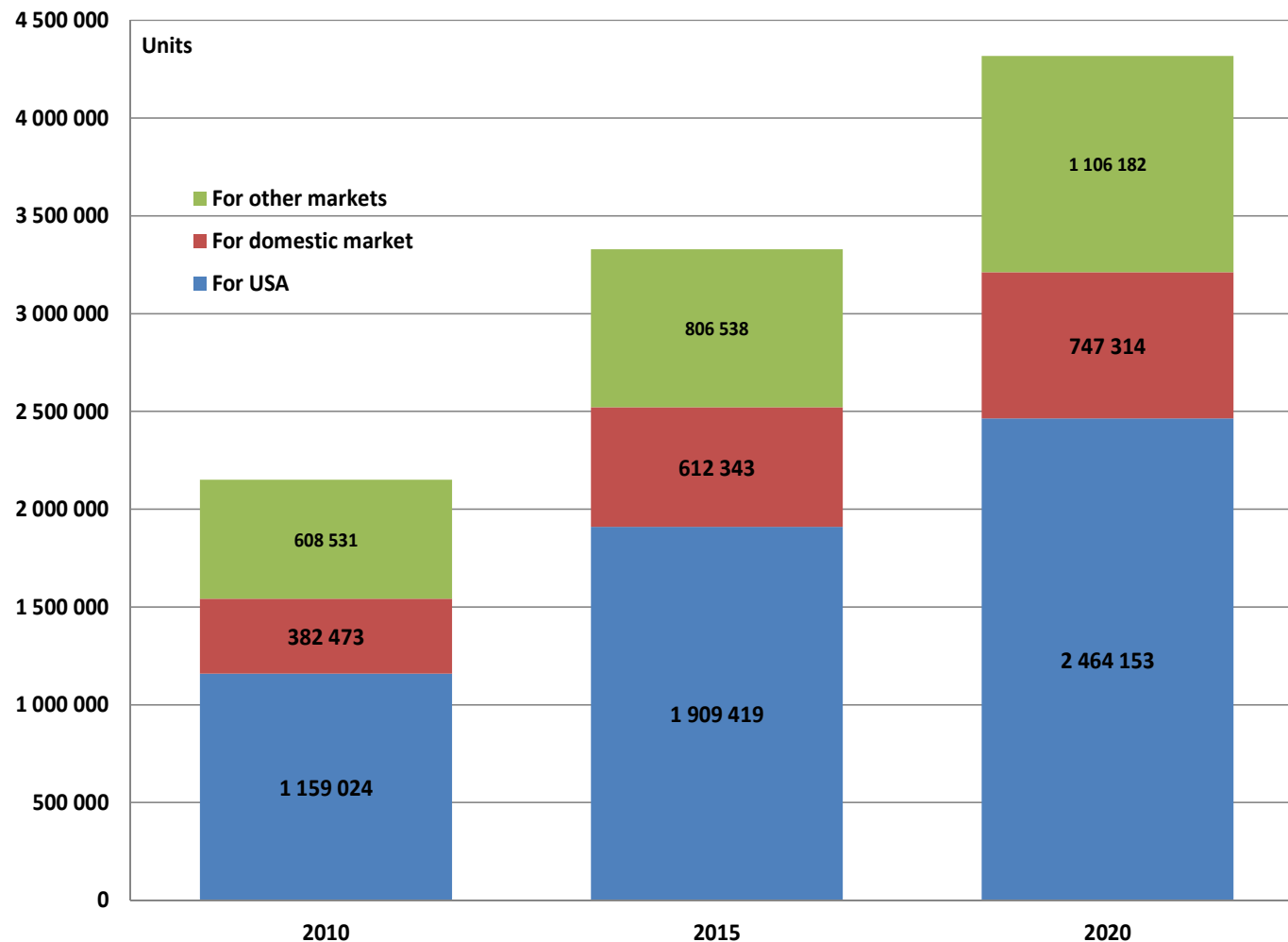
The role of Japan and S. Korea as export hubs is declining dramatically, Trades ex N. America will gain in importance

Shifting export hubs 2005-2018



Mexico light vehicle production will double between 2010 and 2020

Mexico Ligh Vehicle Production Development 2010-2020



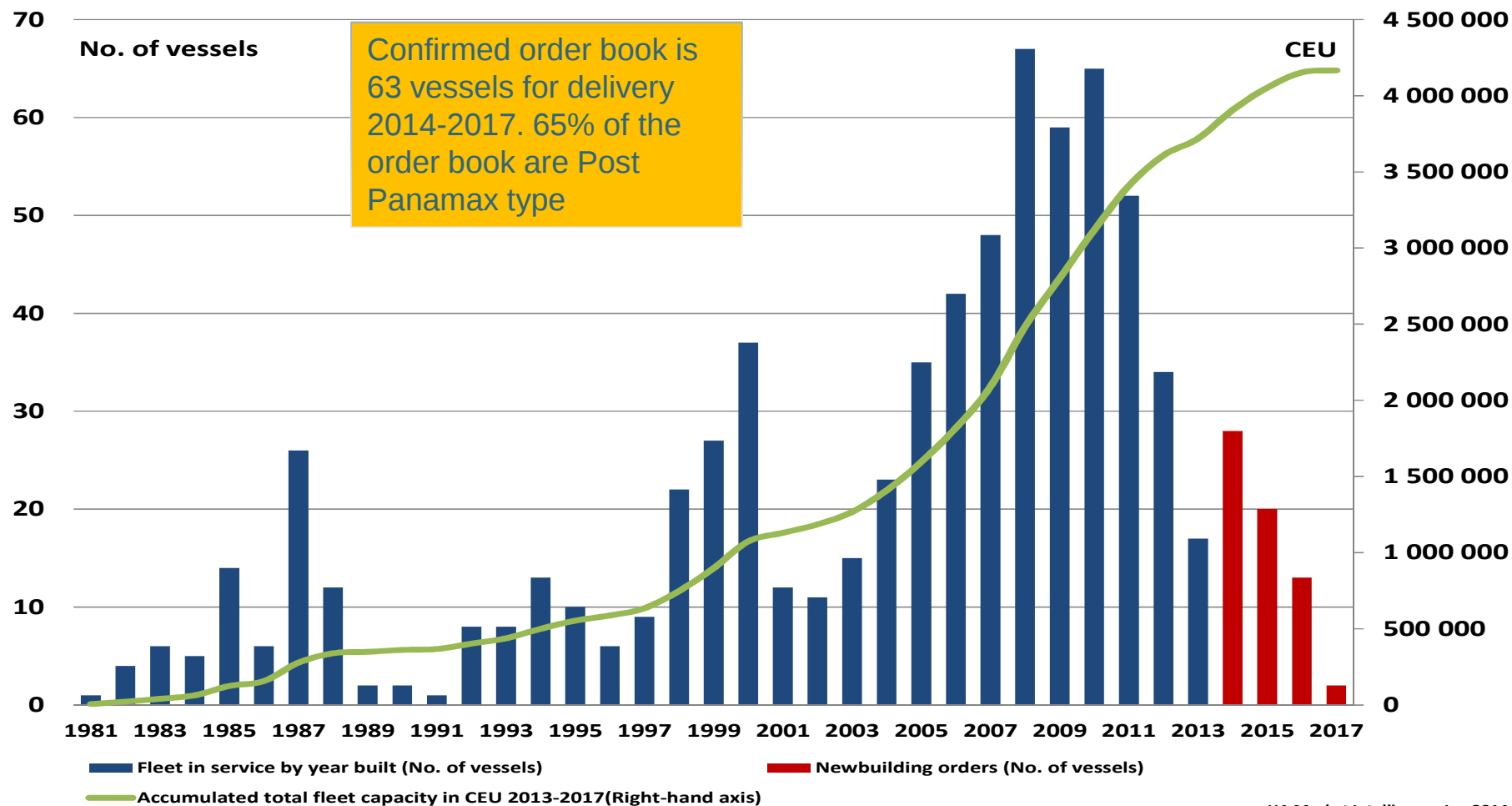
This growth will drive significant development of the Supply Chain

Logistics, port & terminal capacity, short sea service capabilities



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Existing global PCTC fleet and confirmed new buildings



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New Horizon Post Panamax

Xiamen Shipbuilding Industries
Design by Höegh Autoliners & Deltamarin

8.500 vehicle capacity...
14 decks whereof 5 hoistable...
6.5 M main deck height...
250 T quarter ramp capacity...
16 knots design/service speed...
LOA 199,90 M...
Breadth moulded 36,50 M...
Slow speed electronically controlled de-rated main engine...



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