

Shifting International Trade Routes

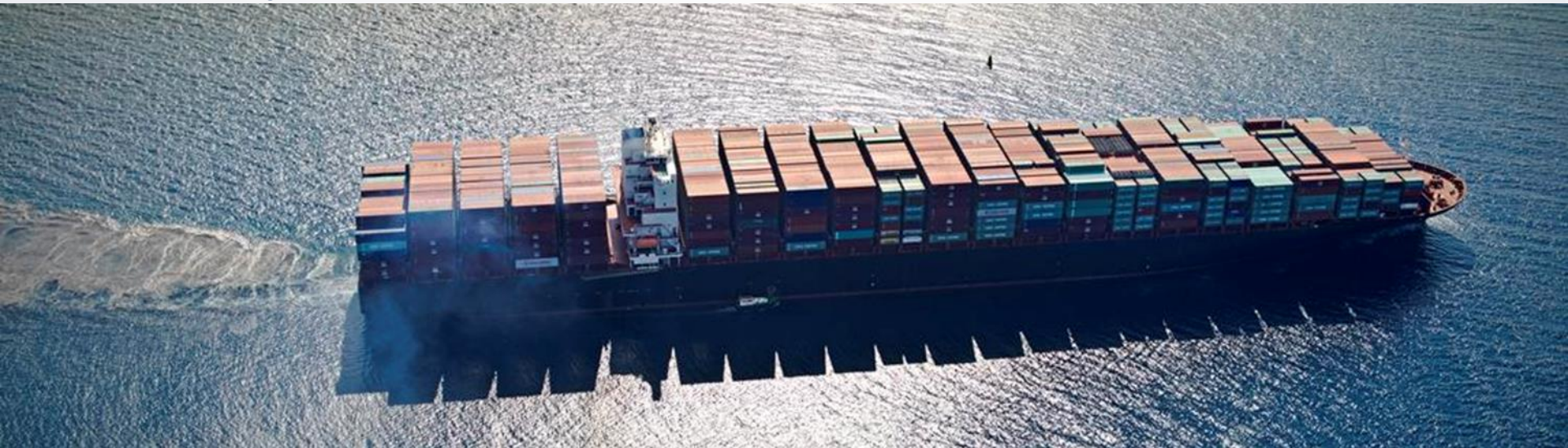


American Association of Port Authorities

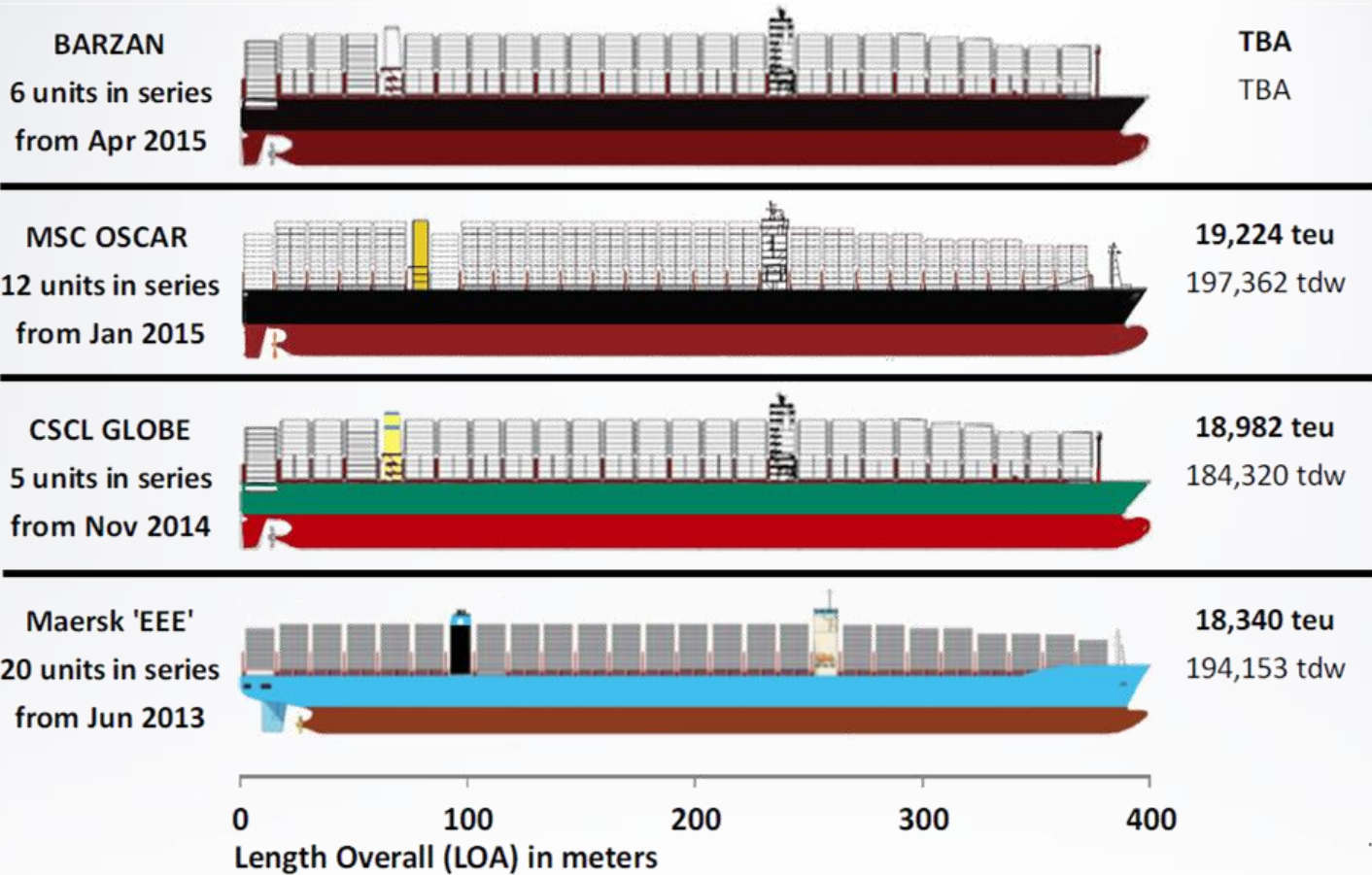


Shipping Industry Overview

- In 2015, Carriers might face long-standing overcapacity in the market, still the demand is very high
- Lower fuel prices may improve carriers finance
- Signs of economic recovery in some regions may have positive impact
- New global alliances begin operation
- Larger ships continue to enter the market...



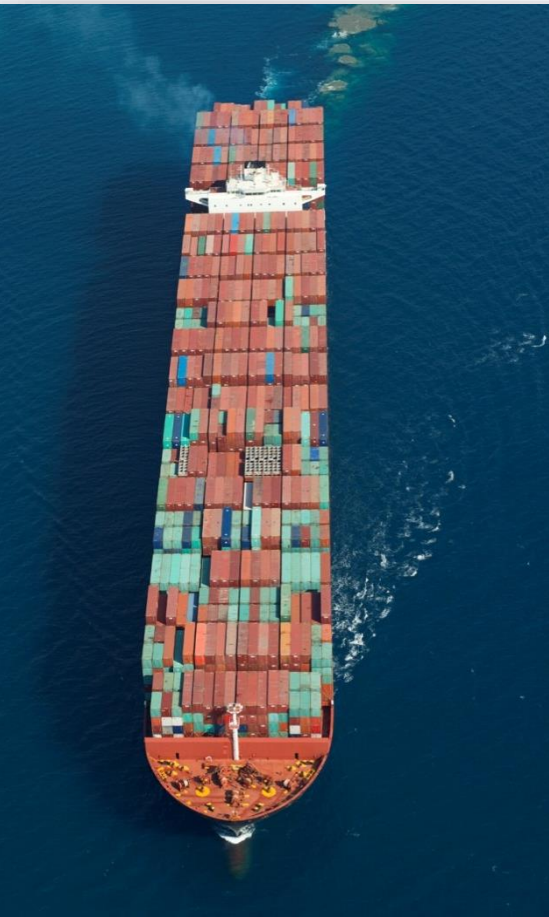
Industry Overview



SOURCE: ALFALINER



The Megaships Trend



- The trend to megaships is driven by economy of scales. It is here to stay.
- Increase in ship size caters for growing market demand

But Bigger ships also means:

- longer stay in ports due to longer discharge/loading time
- Insufficient infrastructure, creating
 - Congestions
 - Lack of chassis
 - L/T issues
 - Ports efficiency

Customer will benefit from megaships - once the infrastructure catches up!



The Megaships Trend

Carriers Alliances allow more efficiency, better t/t and frequency, more reliable service & better port coverage

New global Alliances structure:

- In January 2015 the '2M' (Maersk, MSC) and 'Ocean Three' (CMA CGM, CSCL, UASC) launched new service networks in FE-North America routes
- ZIM cooperates with the G6 alliance on the Transpacific trade



Alliances impact

US West coast situation carriers view point

- Carriers and shippers are on the same side on this issue
- The situation causes operational disruptions and additional costs
- Carriers encourage a fast resolution and return to normal
- **We are acutely aware of the predicament of the shippers and want to help in any way possible**



US West Coast situation

- Our extensive network allows for alternatives to congested West Coast ports
- We use other gateways such as the Gulf, South Atlantic, and the PNW. These gateways are available to shippers.
- Its possible to ship via Houston, Savannah, New York



West coast alternatives

- Chassis – jurisdiction and ownership
- Trucking- the last mile
- Profitability
- Technology



Challenges

3 Vessels, 2800 TEU
R/T – 21 days, Frequency – weekly fix day



Transit Time table

		Kingston	Tampa	Mobile	New Orleans	Houston	Caucedo
		W	W	W	W	E	E
Caucedo	W	3	5	6	11	14	18
Kingston	W		1	2	8	10	14
Tampa	W	15		1	6	8	12
Mobile	W	14	16		4	7	11
New Orleans	W	9	11	12		1	6
Houston	E	6	8	9	14		3

Line Route map



Caucedo - Kingston - Tampa - Mobile - Houston - New Orleans - Caucedo



ZIM GLOBAL REACH LOCAL TOUCH
Integrated Shipping Services Ltd



Why choose ZIM?

Service quality is part of Our Vision!

We Listen to our Customers and strive to exceed their needs



Our Unique Touch



Just Say the World



ZIM at your service