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
Global light vehicle sales will pass 100 Million units by 2018

Global Light Vehicle sales by region 2005-2018

Global sales (Right-Hand Axis)
- Europe
- Greater China
- Japan/Korea
- Middle East/Africa
- North America
- South America
- South Asia

HA Market Intelligence/IHS Oct 2013
Moderate sales in the Triad vs rapidly growing BRICS

Light Vehicle Sales in Triad vs. BRICS and Rest of the World

Units

Emerging markets will grow in importance vs mature markets with a ratio of 31/69 in 2005 to an estimated 58/42 in 2018

Triad: USA, W. Europe, Japan
U.S. market growth to return to 1-2% CAGR between 2013 and 2018; Import penetration to stabilize at 20%
Automotive landscape in transition; 14m units of production will be added in the «Emerging Asia TRIAD» in 2013-2018

By 2018, 40% of global production will be located in the emerging Asia TRIAD

Emerging Asia TRIAD = China, India, ASEAN
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

Source: IHS / HA Market Intelligence Oct 2013
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.
Confirmed order book is 63 vessels for delivery 2014-2017. 65% of the order book are Post Panamax type.
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…