

CONTAINER TERMINAL FORESIGHT 2020

The complete market report consists of 3 separate sections and an executive summary.

| | |
|---|-----------|
| Section 1: Executive Summary | 64 pages |
| Section 2: Global Container Throughput | 128 pages |
| Section 3: Container Terminal Projects | 109 pages |
| Section 4: Container Handling Equipment | 123 pages |

SECTION 1: EXECUTIVE SUMMARY

Consists of the main findings of Section 2, 3 and 4

SECTION 2: GLOBAL CONTAINER THROUGHPUT

Annotations
Abbreviations and Symbols

Chapter 1 Container Industry Environment

| | |
|--|--------------|
| 1.1 World Trade & Seaborne Trade | 9-21 |
| Summary | 10 |
| World Trade 2013 | 11 |
| Exports of Goods 2012 by Commodities | 12 |
| Seaborne Trade 2013 | 13-14 |
| Seaborne Trade Development 1990 - 2013 | 15-17 |
| Megatrends of Trade | 18-21 |
| 1.2 Container Freight Industry | 22-38 |
| Summary | 23 |
| Value Chain and Core Business | 24 |
| Critical Success Factors & Key Challenges | 25 |
| Vertical Integration | 26 |
| Revenue Pool 2012 | 27-28 |
| Freight Forwarder (Competitors, Cost Structure, Profit) | 29-31 |
| Shipping Lines (Competitors, Cost Structure, Profit) | 32-35 |
| Terminal Operators (Competitors, Cost Structure, Profit) | 36-38 |
| 1.3 FCC Fleet (Fully Cellular Containerships) | 39-52 |
| Summary | 40 |
| Containership Fleet | 41 |
| Nominal Capacity 2000 - 2020 | 42 |
| Supply Demand Balance | 43 |
| Nominal vs. Effective Capacity 2008 - 2014 | 44-45 |
| Freight and Charter Rates | 46 |
| Fleet & Vessel Size Development 1985 - 2014 | 47-50 |
| Voyage Cost by Vessel Size | 51-52 |

CONTAINER TERMINAL FORESIGHT 2020

Chapter 2 Container Throughput Forecast

| | |
|--|---------------|
| <u>2.1 Methodology</u> | <u>53-64</u> |
| Summary | 54 |
| Starting Point | 55 |
| Introduction on Throughput Forecasting | 56 |
| Conventional Approach | 57-58 |
| Other Options for Forecasting | 59 |
| New Approach | 60-61 |
| Considering Country Income Levels | 62-63 |
| Forecasting Model | 64 |
| | |
| <u>2.2 Global Container Throughput</u> | <u>65-76</u> |
| Summary | 66 |
| Throughput 2012 - 2013 | 67 |
| Global Throughput Forecast 2020 | 68-69 |
| Transshipment & ECH Forecast 2020 | 70-75 |
| Port Concentration | 76 |
| | |
| <u>2.3 Regional Container Throughput</u> | <u>77-108</u> |
| Overview | 78-80 |
| Americas | 81-87 |
| Europe | 88-93 |
| Middle East / Africa | 94-99 |
| China | 100-102 |
| Asia | 103-108 |

Annex **109-128**

- Composition of Regions & Country Codes
- Vessel Size Definition
- Tables: IMEX of Manufactures Projection 2020
- Tables: Throughput Projection 2020
- Tables: Transshipment and EHC Projection 2020

CONTAINER TERMINAL FORESIGHT 2020

SECTION 3: CONTAINER TERMINAL PROJECTS

| | | |
|------------------|---|---------------|
| | Annotations | |
| | Abbreviations and Symbols | |
| Chapter 1 | Review of Capacity Development (2010 - 2013) | 8-15 |
| | Summary | 9 |
| | Container Terminal Capacity | 10 |
| | Global Capacity Utilization | 11 |
| | Global Excess Capacity | 12 |
| | Regional Capacity Utilization 2013 | 13 |
| | Utilization vs Profit | 14 |
| | Investment Behavior of Terminal Operators | 15 |
| Chapter 2 | Description of Identified Projects | 16-27 |
| | Summary | 17 |
| | Largest Future Projects | 18 |
| | Identified Projects vs Throughput Forecast | 19-20 |
| | Timeline by Project Status | 21 |
| | Current Project Status | 22 |
| | Identified Projects by Region | 23-24 |
| | Projects & Type of Investment | 25-26 |
| | Identified Projects per Country | 27 |
| Chapter 3 | Future Supply / Demand Balance (2014 - 2020) | 28-46 |
| | Introduction | 29 |
| | Approach | 31-32 |
| | Americas | 33-36 |
| | Europe | 37-39 |
| | Middle East & Africa | 40-42 |
| | China | 43 |
| | Asia | 44-46 |
| Chapter 4 | Capacity Projection 2020 | 47-55 |
| | Global Capacity Projection 2020 | 48 |
| | Projection 2014 - 2016 | 49 |
| | Capacity Utilization 2016 | 50 |
| | Projection 2017 - 2020 | 51 |
| | Capacity Utilization 2020 | 52 |
| | Investment Requirements | 53-55 |
| Annex | | 56-109 |
| | Composition of Regions & Country Codes | 57-59 |
| | Table: Capacity Projection 2020 (Chapter 4) | 60 |
| | Tables: Supply / Demand 2020 (Chapter 3) | 61-64 |
| | Tables: Project List | 65-109 |

CONTAINER TERMINAL FORESIGHT 2020

SECTION 4: CONTAINER HANDLING EQUIPMENT

Annotations
Abbreviations and Symbols

| | | |
|------------------|--|----------------|
| Chapter 1 | Current Equipment Market | |
| 1.1 | Market Overview | 8-21 |
| | Summary | 9 |
| | Market Segments | 10 |
| | Market Volume & Dynamics 2005 - 2013 | 11-16 |
| | Competition: | |
| | - Key Business Areas & Product Portfolio | 17 |
| | - Industry Margin | 18 |
| | - M&A in the Container Handling Industry | 19 |
| | - Market Shares 2011-'13 | 20-21 |
| 1.2 | Market Segments | 22-93 |
| 1.2.1 | STS Cranes | 22-35 |
| 1.2.2 | MHC Cranes | 36-43 |
| 1.2.3 | RTG Cranes | 44-54 |
| 1.2.4 | RMG Cranes & ASCs | 55-69 |
| 1.2.5 | Straddle Carriers | 70-77 |
| 1.2.6 | Reachstackers | 78-82 |
| 1.2.7 | Forklift Trucks | 83-87 |
| 1.2.8 | Terminal Tractors & AGVs | 88-93 |
| Chapter 2 | Market Outlook | 94-115 |
| | Summary | 95 |
| | Approach | 96-98 |
| | Market Volume 2013-'20 | 99-100 |
| | STS Cranes - Forecast 2020 | 101-103 |
| | MHC Cranes - Forecast 2020 | 104 |
| | Yard Cranes - Forecast 2020 | 105-106 |
| | ASC - Forecast 2020 | 107-110 |
| | RTG- Forecast 2020 | 111-112 |
| | RMG - Forecast 2020 | 113 |
| | Straddle Carrier - Forecast 2020 | 114 |
| | Mobile Equipment - Forecast 2020 | 115 |
| Annex | | 116-123 |

For further information, please contact
Mr. Daniel Schäfer
Mobile: +49 (0) 171 6974549
schaefer@ctf2020.info
or visit www.ctf2020.info