



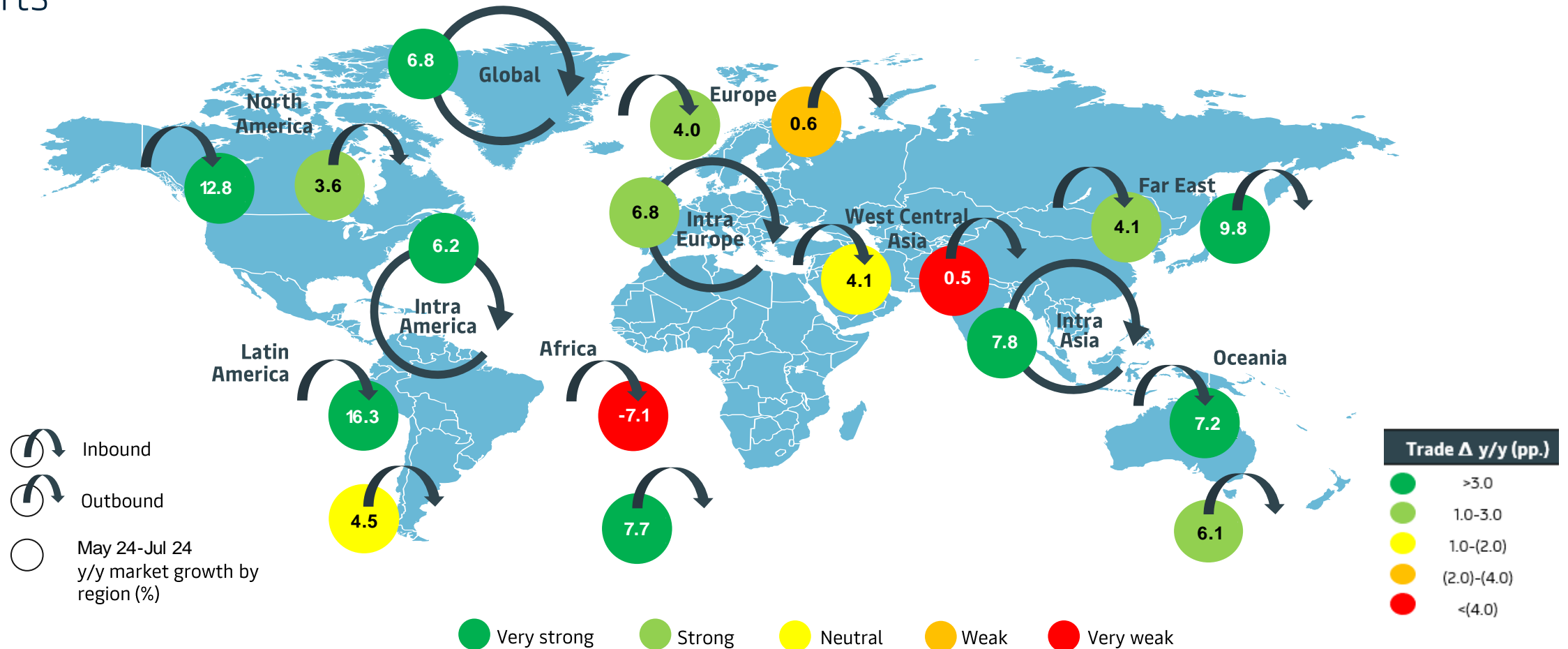
Navigating Challenges and Opportunities in the Search of Resilience

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Head of Operations – Americas
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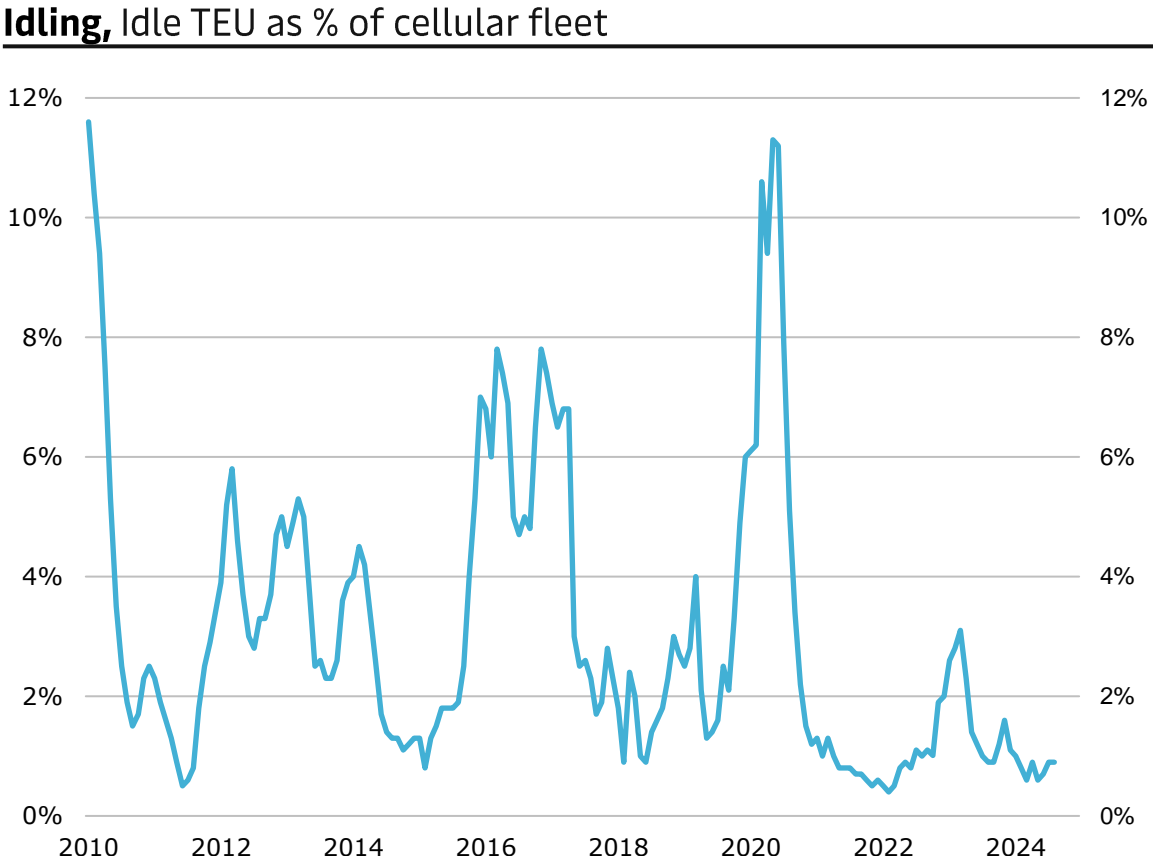
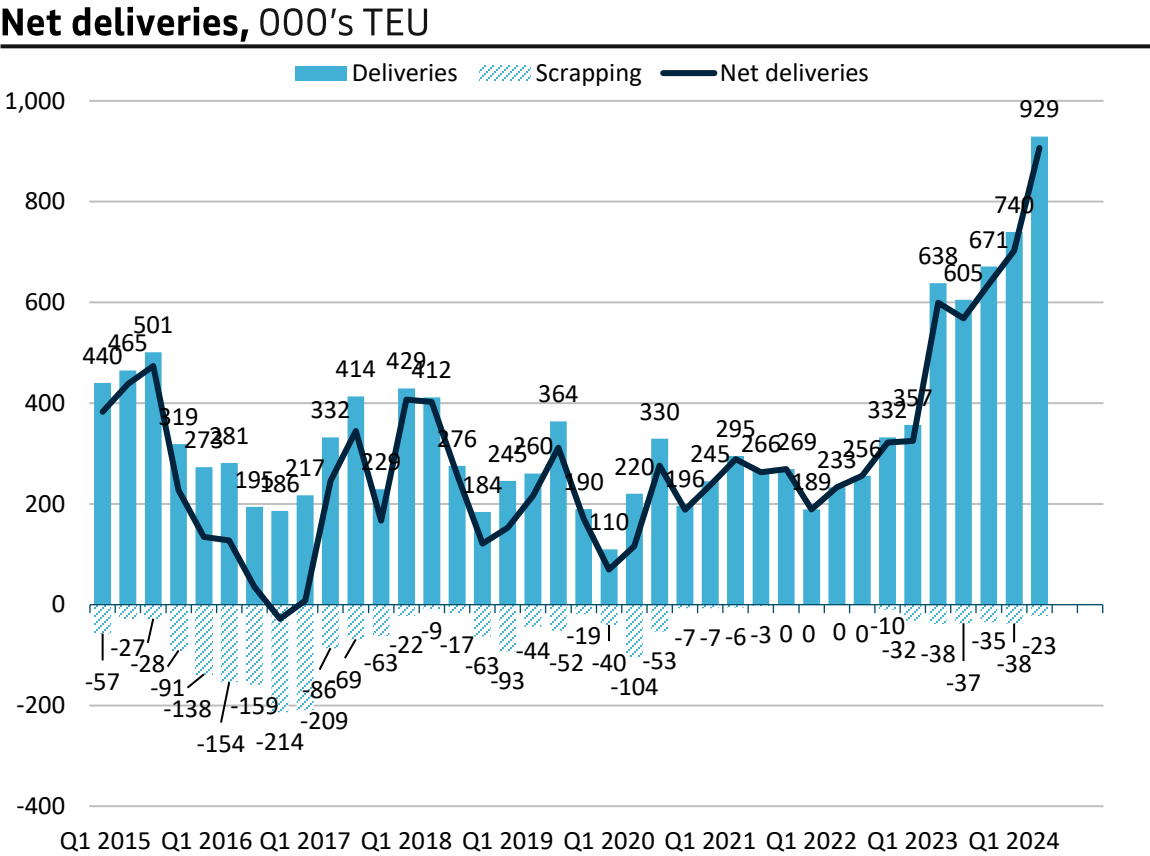
Overall Market Conditions
Continue to
Remain Challenging

Container Demand – Exports out of FEA continue to show robust growth, mirrored by an increase in IAS. Strong momentum also is observed in NAM-LAM imports



Note: 1) Data displayed on geographical regions excl. Intra REG, 2) Colours embed information on the current dynamics relative to the 2011-19 average.
Source: FBR.

Supply – The large influx of deliveries continued in Q2 and helped addressing the reorganisation of networks after the Red Sea crisis. Idling remains low

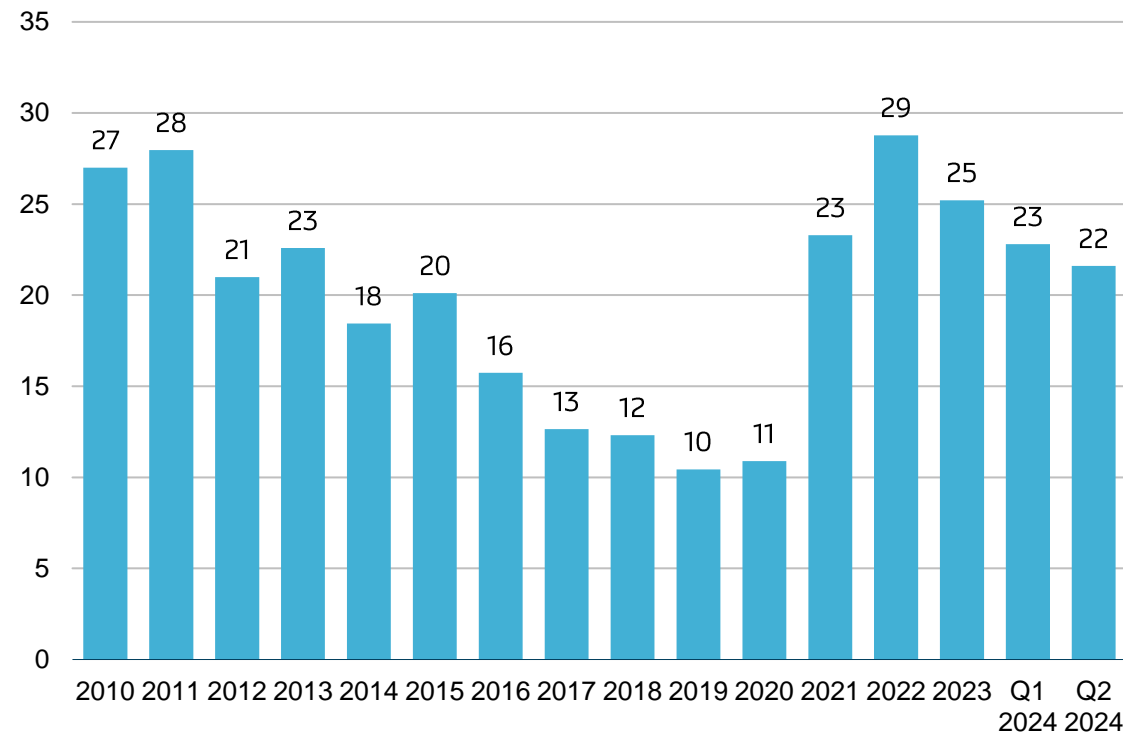


Note: Net deliveries are updated only once a quarter. Latest update was July 2024.
Source: Alphaliner



Container Supply – The industry orderbook has rebounded strongly since end of 2020, and although it has started to decline, it remains elevated

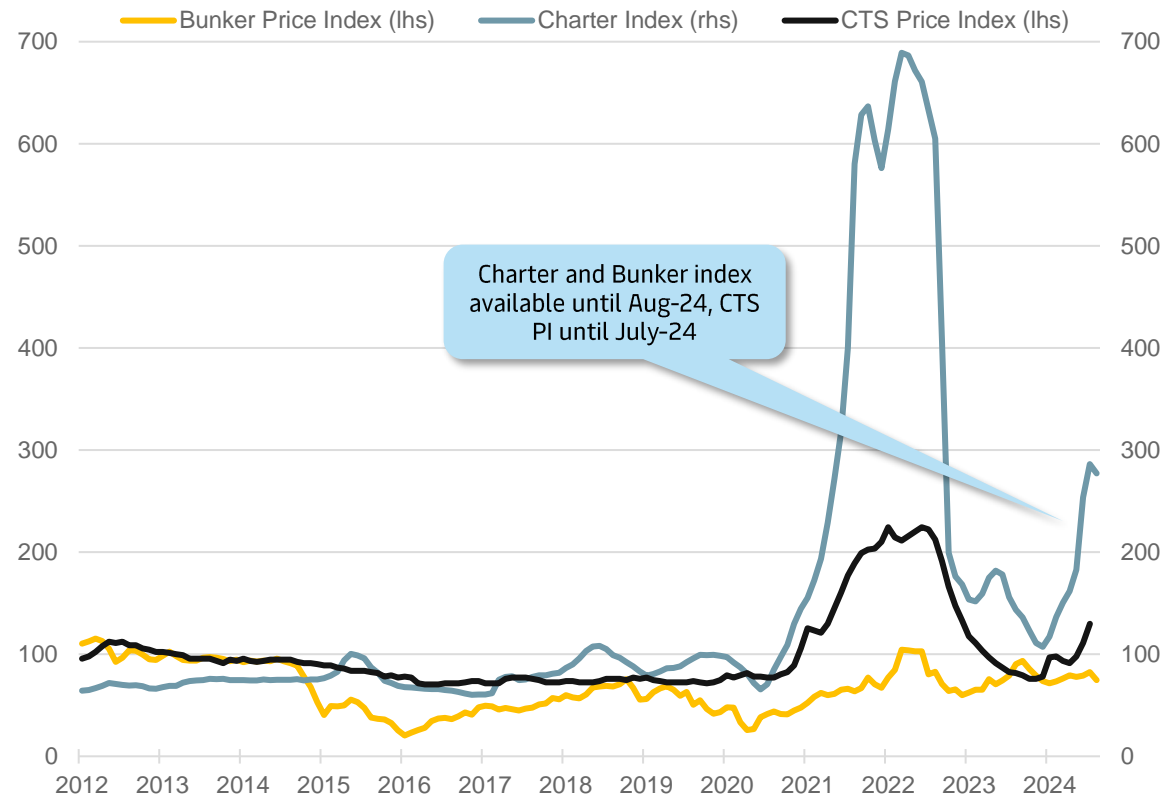
Orderbook, % of current fleet (end of period)



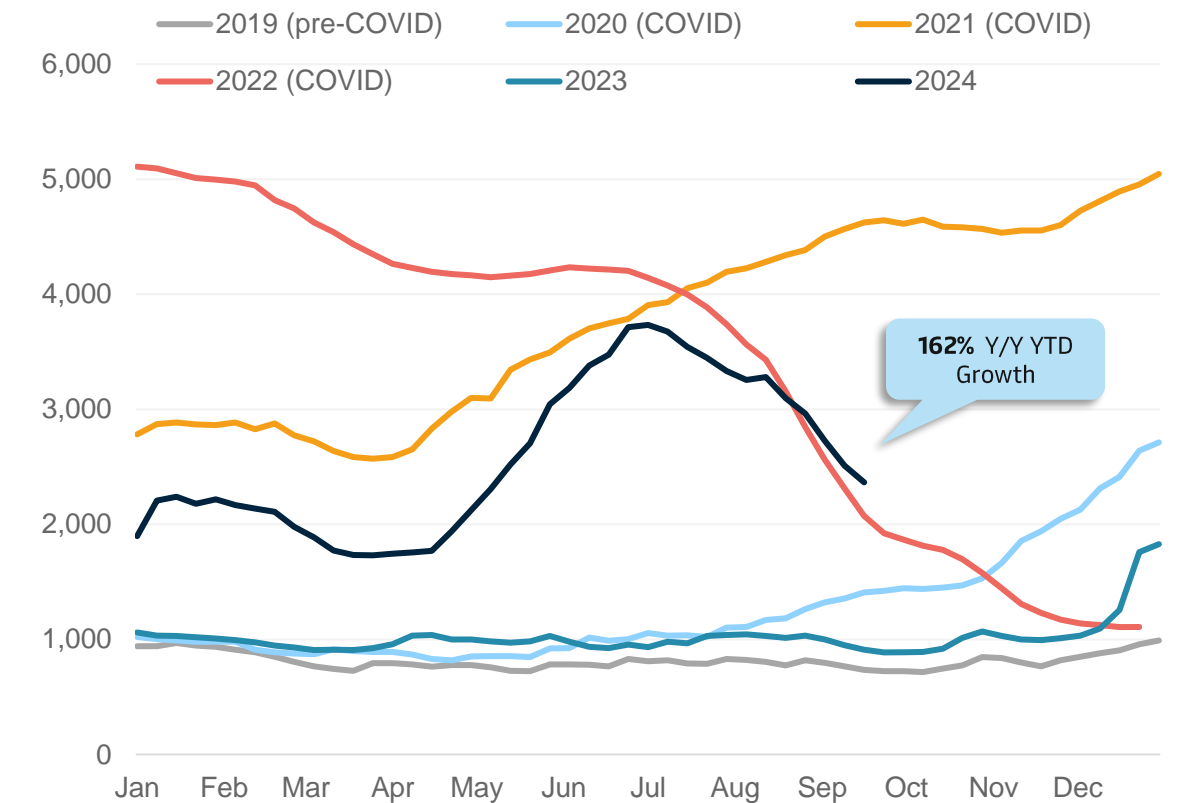
Source: Alphaliner

Freight Rates – CTS global price index rose in July but is expected to have peaked. Spot rates increased significantly in Q2, but lost momentum through July and August

Bunker Index, Charter Rates and CTS Price Index, Index (2011=100)



SCFI Composite, Index

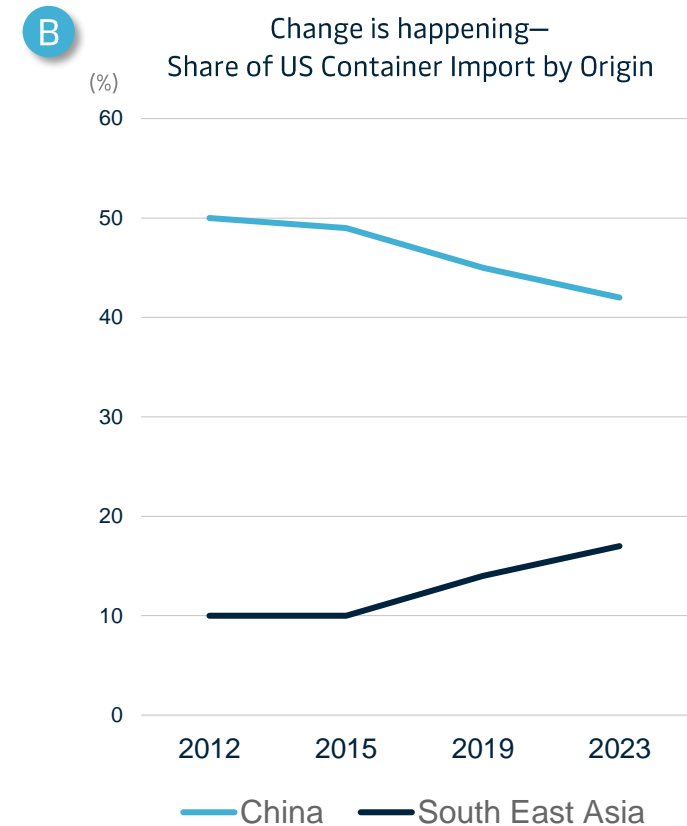
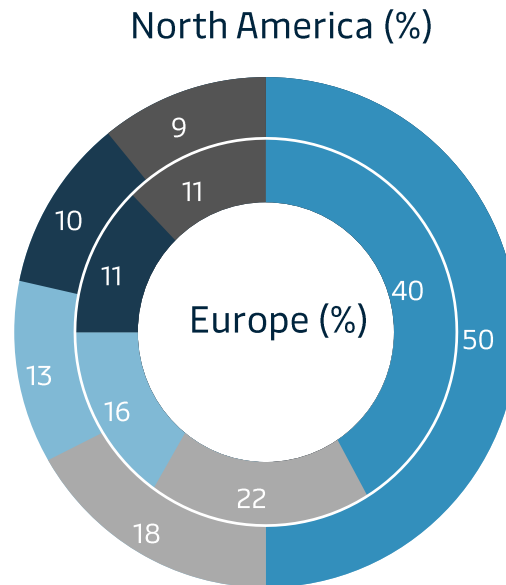


Note: 1) The CTS Price Index covers around 50% of global trade and is made up of both contract and spot cargo while SCFI only covers spot out of Shanghai.
Source: Shanghai Shipping Exchange, CTS, Clarkson, Maersk Strategic Intelligence calculations.

Some Responses to the Uncertainty

A "Companies are **more responsive now**. They are responsive to where they think things are going, they are responsive to consumers, they are responsive to regulations".

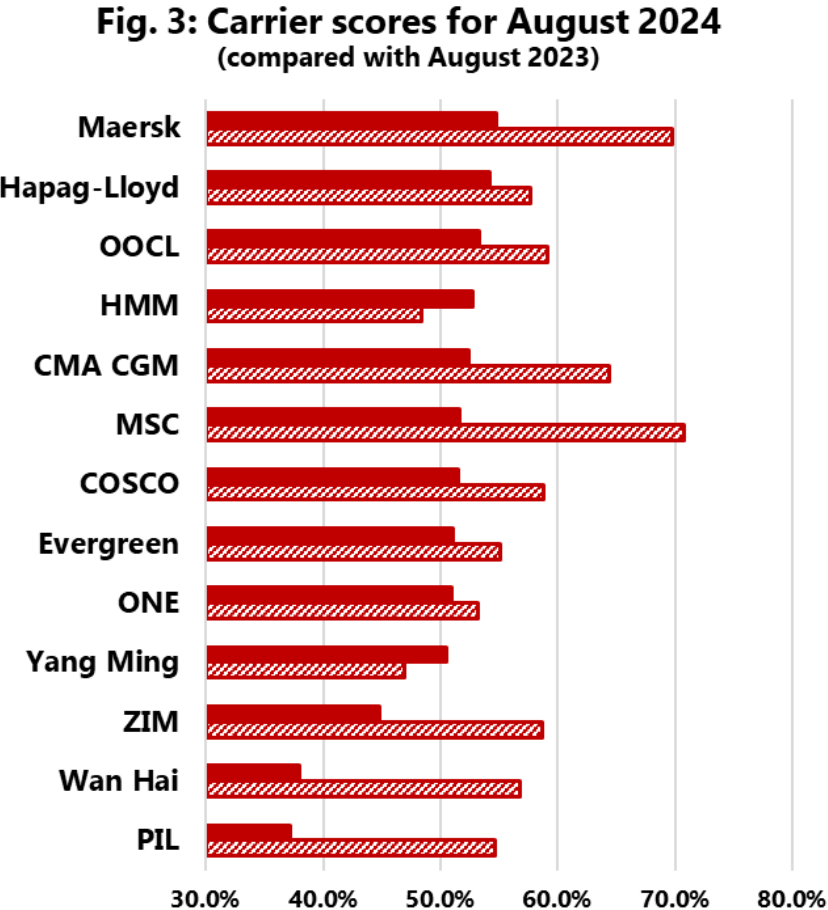
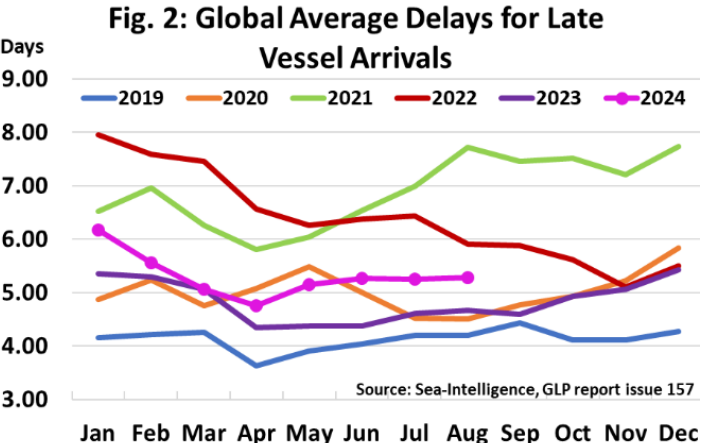
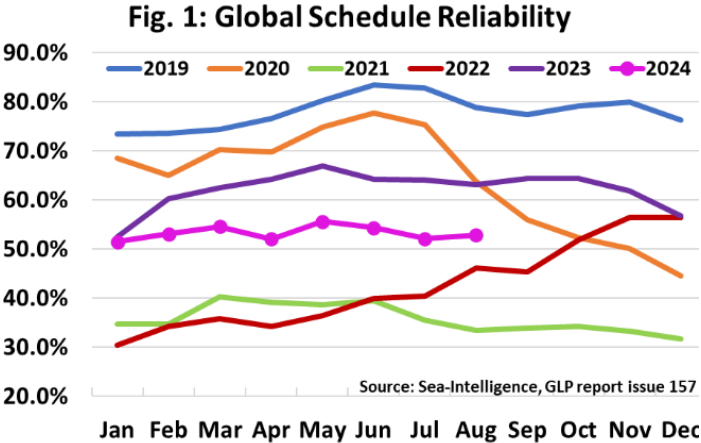
- Diversifying the supplier base
- Nearshoring/regionalisation
- Reshoring
- Working with fewer suppliers regardless of location
- Currently not reconfiguring supply chain





Addressing Reliability

Global Schedule Reliability



Source: Sea Intelligence, August 2024





DISRUPTIONS ARE INEVITABLE AND EXPENSIVE

- A recent study by Accenture revealed **disruptions cause 1.6 trillion USD in missed revenue** on average each year.
- Events such as the Red Sea crisis have shown us that disruptions can spring from anywhere and leave a **lasting impact across your supply chain**.
- Issues like **port congestions**, often seen at major harbours, **cause domino delays** that can last several weeks and **result in missed sales, stacked inventories, high D&D costs**.
- These situations **also affect logistics services**, affecting ocean service reliability, schedule predictability, which have a **knock-on effect on your businesses** today and your objectives tomorrow.
- However, despite increasing carrier capacity and fleet sizes, **reliability continues to be a challenge**.

*Going faster is not the
answer, and neither
is sailing more ships...*



MAERSK

Introducing the **NETWORK OF THE FUTURE**



We'll deploy a fleet of 300 vessels and capacity of 3.4 million TEU on Trans Suez routes and 341 vessels with 3.7 million TEU capacity via the Cape of Good Hope.



The new network gains its reliability and flexibility through the optimised use of our fleets of mainline and shuttle vessels, combined with the global network of transshipment hubs and inland services.



Maersk and Hapag-Lloyd have come together in a long-term operational collaboration – called the **Gemini Cooperation**.



This enhanced agility of the new network enables us to transport your containers on major East-West trade lanes via optimised routes to get ahead of potential delays and disruptions.



Decarbonising
our Global Operations

Maersk's Climate Commitments

Validated by the Science Based Targets initiative

Aligned with 1.5 degree pathway by 2030

2030

Net Zero by 2040

2040

Main KPIs and targets: Baseline year 2022

Scope 1

Own operation

35% Absolute reduction in total scope 1 emissions

Scope 2

Purchased electricity

100% Renewable electricity sourcing

Scope 3

Value chain

22% Absolute reduction in total scope 3 emissions

96% Absolute reduction in total scope 1 and 2 emissions*

90% Absolute reduction in total scope 3 emissions*



* Residual emissions will be neutralised in accordance with the Net Zero criteria of the Science Based Targets initiative.



All the way to zero

Maersk investments in dual-fuel vessels

25 owned **methanol** vessels **with dual-fuel engines**. They will enter the fleet from 2026 to 2030 and replace aging vessels.

2,100 container capacity



Laura Mærsk (feeder)

2,100 TEU

16,000 / 17,000 container capacity



18 vessels (four in operation)

16,000/17,000 TEU

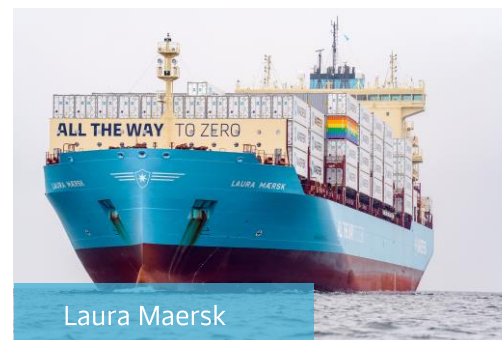
9,000 container capacity



6 vessels

9,000 TEU

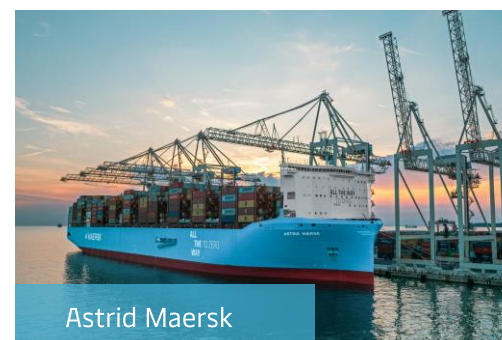
50-60 **dual-fuel vessels** **ordered in 2024**. These vessels will be a mix of methanol and liquefied gas propulsion system that can sail on conventional and low GHG emission fuels.



Laura Maersk



Antonia Maersk



Astrid Maersk



Ane Maersk



Alette Maersk



Looking
Ahead



MAERSK



Continued disruption and
pressure on global
supply chain



Reliability requires
all players to
work together



Global regulations
on shipping
emissions

Thank
you