



**PORT TRENDS**

# Navigating the Future

Analyzing Shipping & Cargo Data

**Aqaba April 2025**







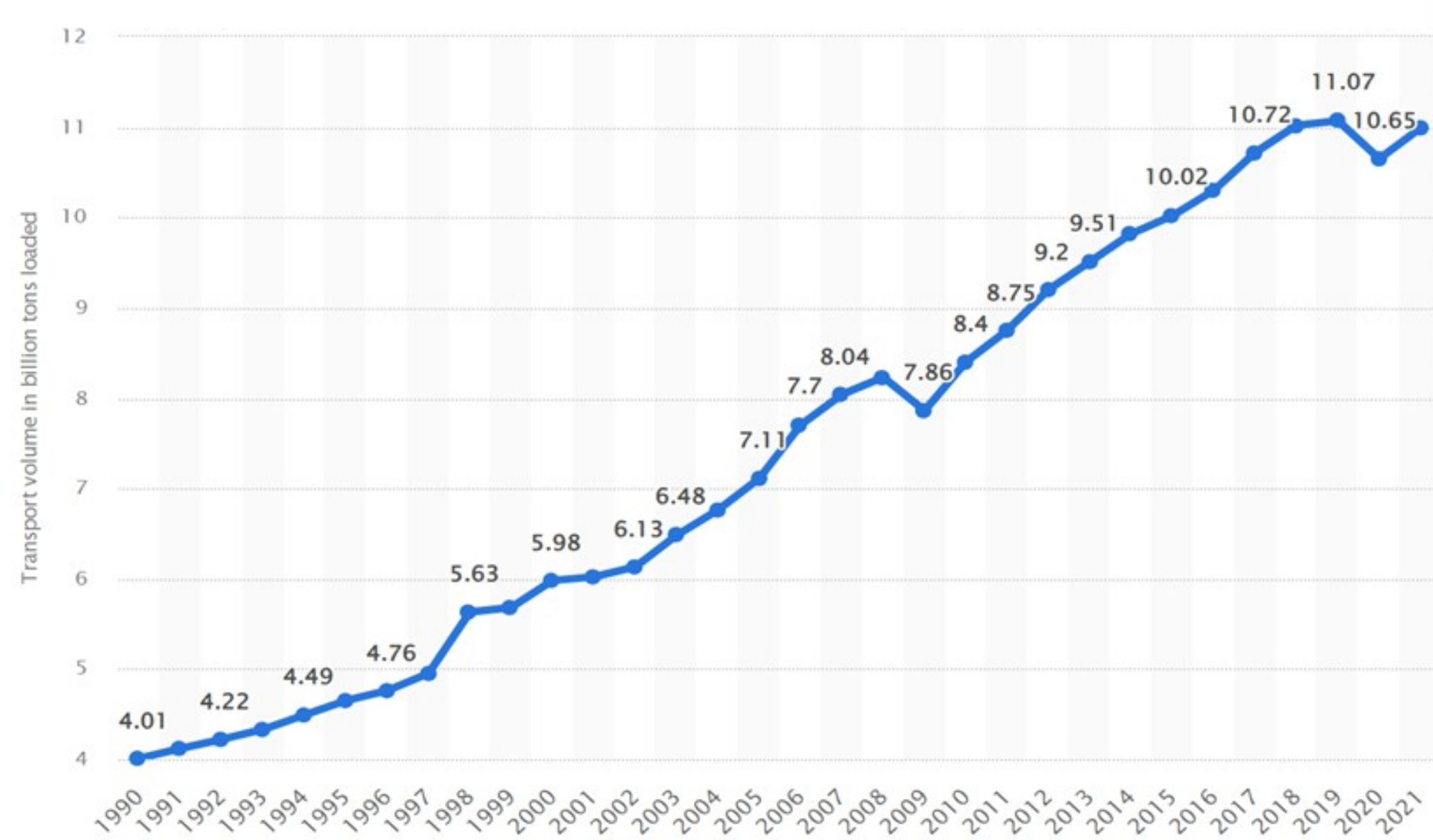
# Presentation Overview

## Global Maritime Trade Overview

Global maritime trade is the backbone of the world economy. This presentation will start by providing an overview of its importance and impact on international commerce.

## Shipping companies & Port Operators

Trends will be analyzed in the different types of cargo carried by ships, including the growth and patterns in each segment, to gain insights into the shipping industry's current state.



## Challenges and Opportunities

The presentation dives into the challenges and opportunities faced by the maritime industry in the future, including new technologies, regulations, environment in a VUCA context

## Port Trends. Navigating the future.

Ports trends will be analyzed in the short and mid term. The ports of the future will be drawn, analyzing other sectors trends, under the point of view of governance, ESG, environment, and digitalization; then, what will be next.



# Why ?

## GLOBAL TRADE BY ROUTE

### Maritime Trade and the Global Economy

Maritime trade is essential for the global economy, connecting producers and consumers worldwide. It plays a crucial role in the transportation of goods and fuels economic growth.

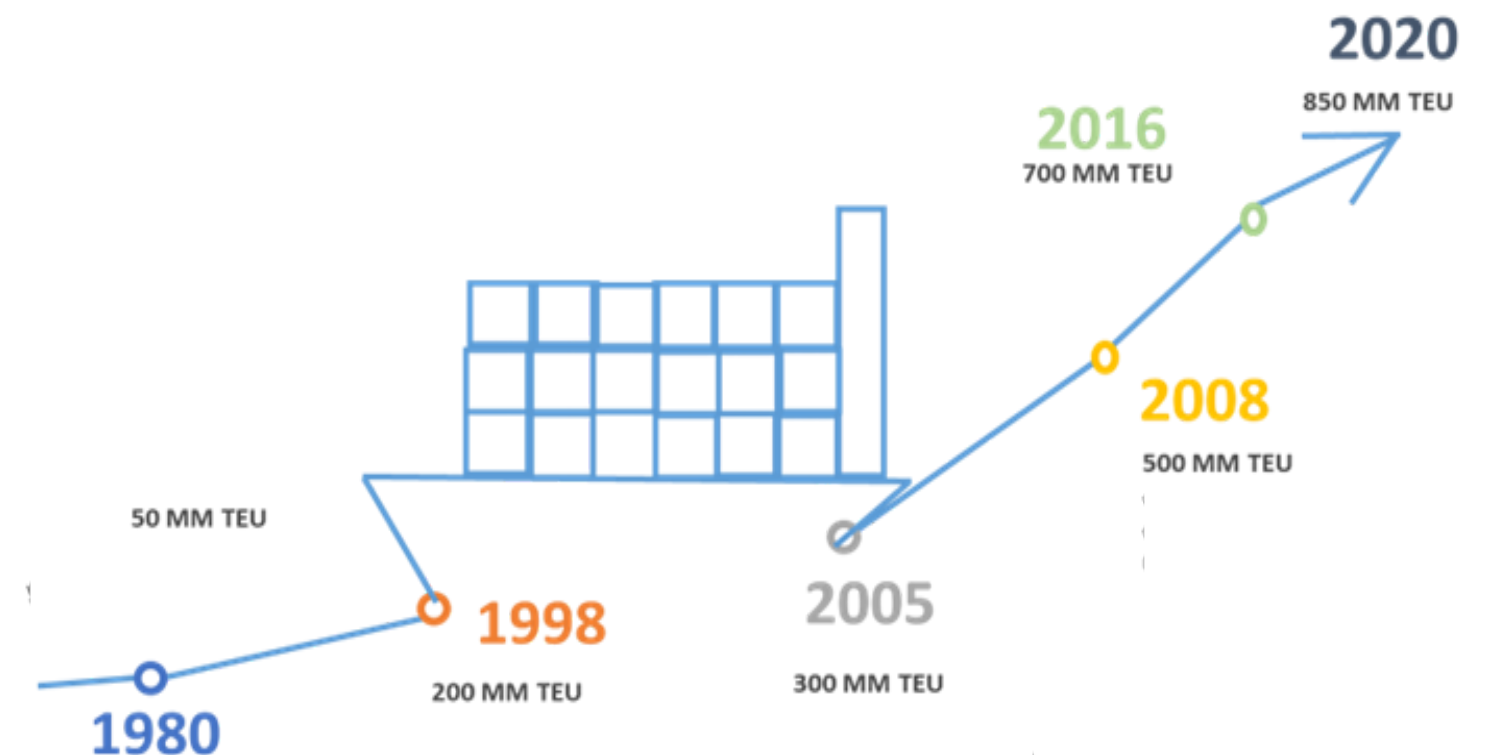
### Regional Patterns of Maritime Trade

Maritime trade is characterized by regional patterns of imports and exports. Certain regions are major exporters, while others are major importers.

### Main Players in the Industry

The maritime trade industry comprises many players, including ship owners, shipping lines, port operators, and freight forwarders. The world's largest shipping lines dominate the industry but there are new players getting new roles.

## CONTAINER REVOLUTION FROM 50 TO 900 M. TEU



- **East Asia as global factory: 40% maritime routes East-West**

- **From Shanghai to Valencia:**

1Ton screws 3,000 €

100 gr screws 1,500 €

Secondary routes involving developing countries' trade are increasingly important.

# Global Maritime Trade

+24%  
growth  
in 2024

# VUCA Context

WORLD MARITIME TRADE. OVERVIEW AND EVOLUTION

## INTERNATIONAL MARITIME TRADE BY CARGO TYPE, MILLION TONS LOADED, 2023

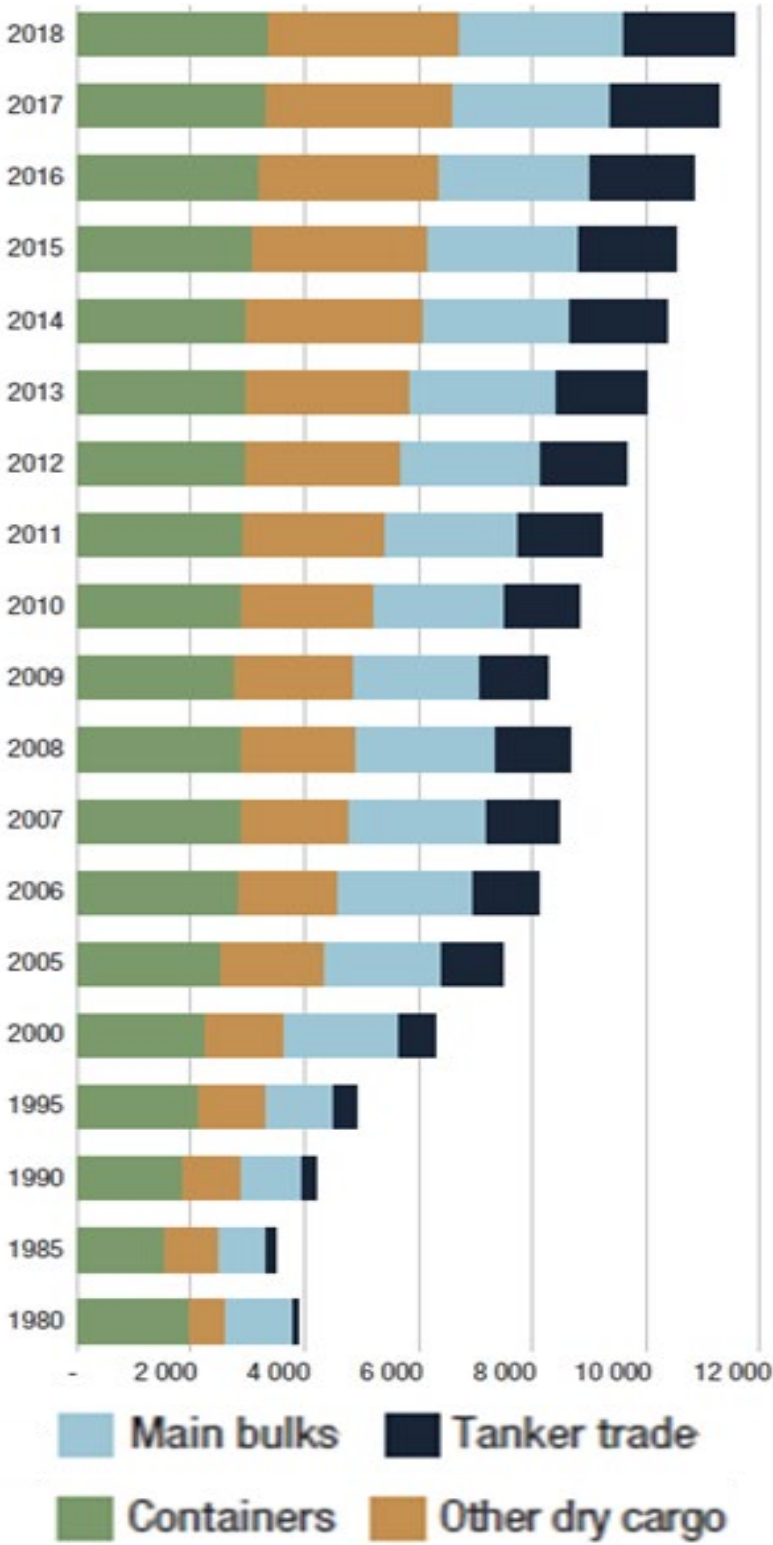
**\$23 Billion / 12.3 billion tons**

In 2023, major dry bulk commodities represented more than 30 % of total cargo: Liquid bulk, represent 25% of total cargo, while containerized trade accounted for 24% and minor bulks for 21%. The remaining volumes were made of other dry cargo.

Tanker trade shipments (oil, gas and chemicals) accounted for roughly 25% of total maritime trade volume, which contrast with the 55% reached nearly five decades earlier.

**Containerized cargo expanded at the fastest rate, with volumes rising at an annual average rate of 8.0 per cent between 1980 and 2024.**

Source: Review of Maritime Transport UNCTAD, 2024



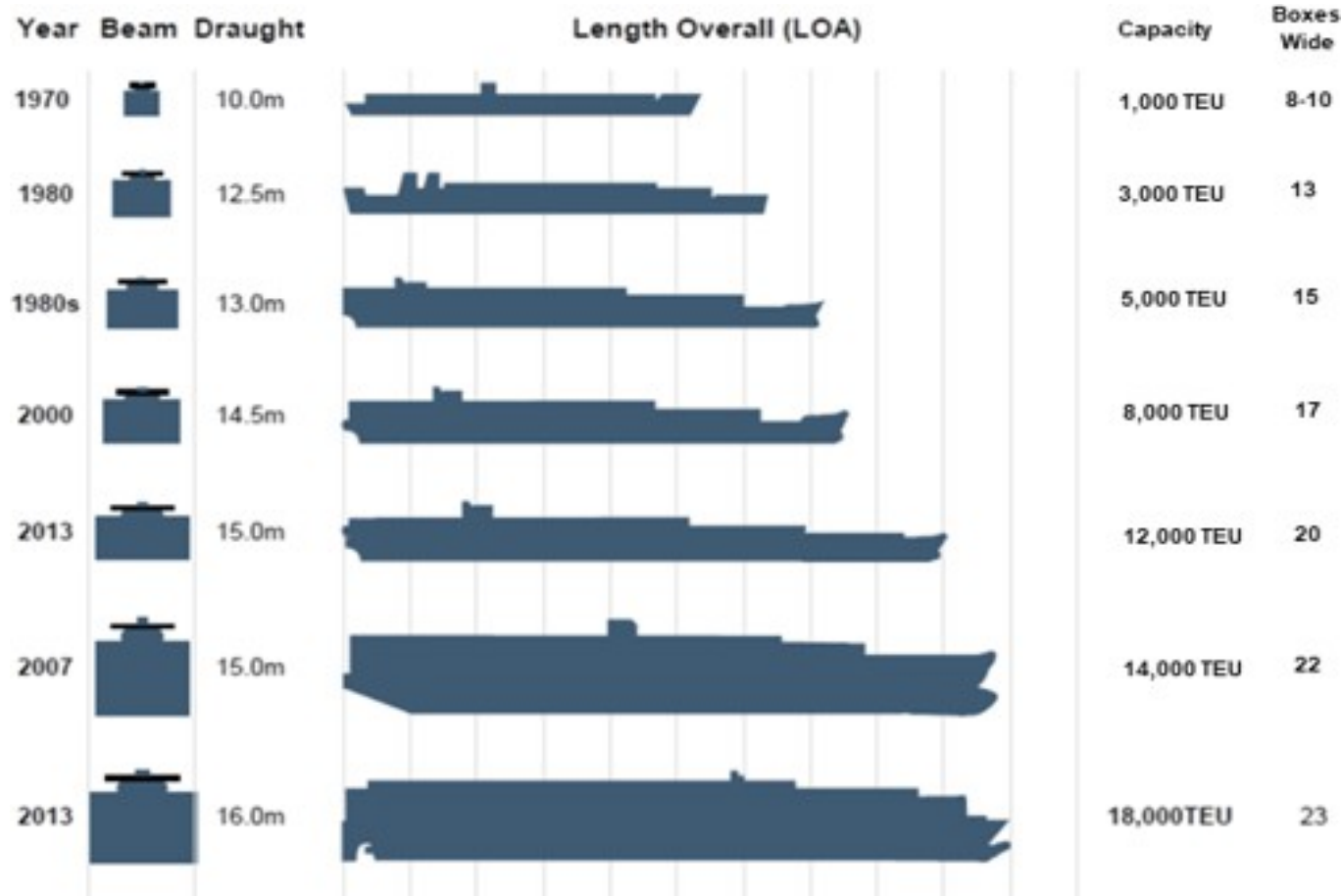
Year	Total seaborne trade	Containerized trade
2024	2,4	3,2
2025	2,2	3,2
2026	2,2	3,2
2027	2,1	3
2028	2,1	2,9

# Shipping Companies. Trends

## SHIPPING COMPANIES AND MAIN ALLIANCES

COMPANY	TOTAL(2018) (vessels)
Maersk Line	2,303
Cosco	1,695
MSC	1,252
CMA CGM	1,070
Hapag-Lloyd	1,024
Evergreen	559
NYK	380
PIL	344
MOL	274
K Line	250
Total	9,151

Suezmax ships: 20.1 m of draught with the beam no wider than 50 m or 12.2 m of draught with maximum beam of 77.5 m



ALLIANCE	MEMBERS	DETAILS OF ALLIANCE
GEMINI COOPERATION	Maersk & Hapag Lloyd	Starting feb 2025
2M	MSC & Maersk	Formed in 2015 (33% Market) to an end in 2025
OCEAN ALLIANCE	CMA-CGM, Cosco Group, OOCL & Evergreen	Formed in 2015 (33% Market) to an end in 2032. Capacity of 3.8 Million TEU
THE ALLIANCE/ PREMIER ALLIANCE	Hapag lloyd, NYK, Yang Ming, MOL, K-Line, HMM	Launched in 2017. Capacity of 3.3 Million TEU



### MSC IRINA

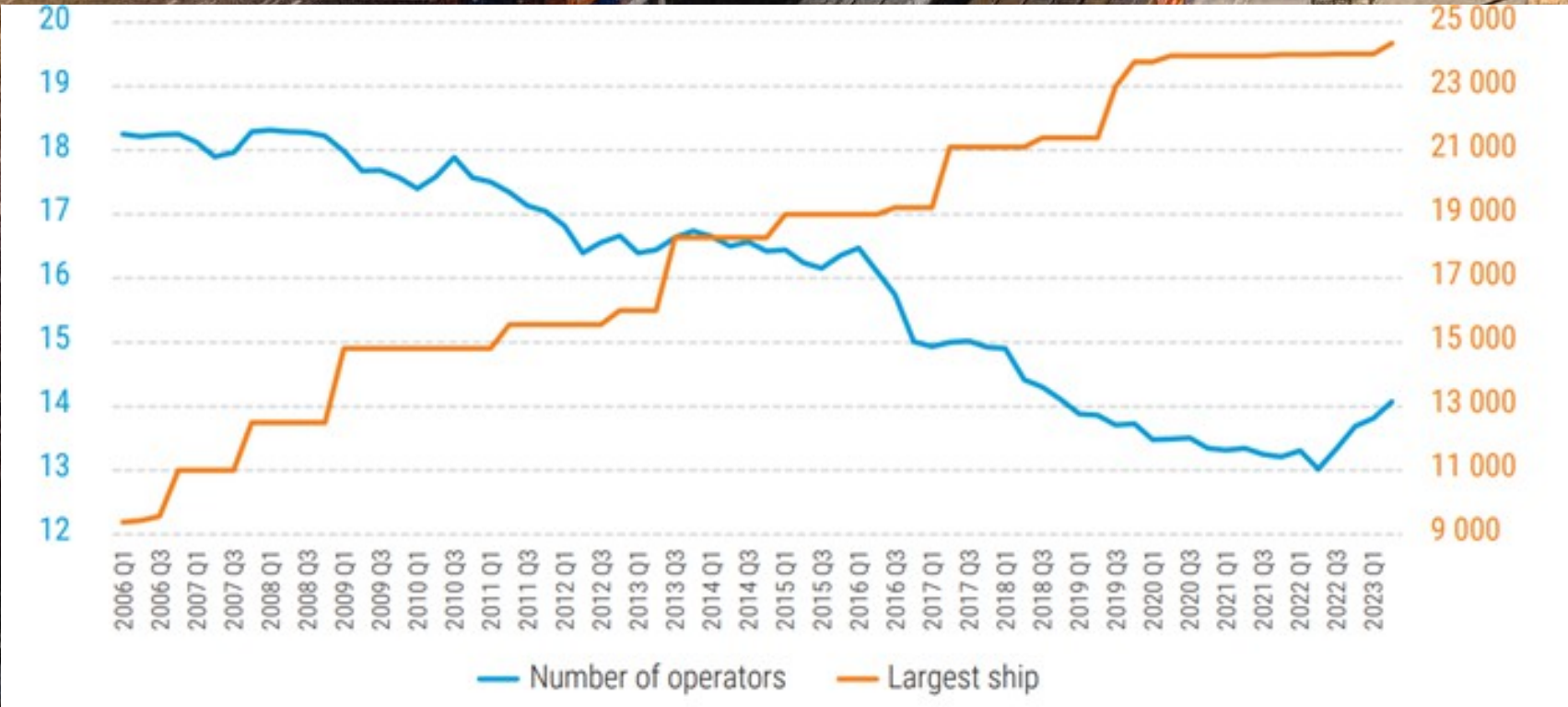
Length: 399.9 meters  
Beam (width): 61.3 meters  
Container capacity: 24,346 TEU



# Shipping Companies and Port Operators

## PORT OPERATORS

	OPERATOR	COUNTRY	TEU (MILLION)	TERMINALS	SHIPPING LINE	REVENUE (\$)
1	PSA INTERNATIONAL	SINGAPUR	61	50	NO	
2	COSCO SHIPPING PORTS (CSP)	CHINA	48	36	YES	
3	APMT	THE NETHERLANDS	44	75	YES	3.2 B
4	CHINA MERCHANTS GROUP	CHINA	44			
5	DUBAI PORTS WORLD (DPW)	UAE	44	180	NO	8.5 B
6	HUTCHISON PORTS	CHINA	44	52	NO	
7	TIL (MEDITERRANEAN SHIPPING COMPANY GROUP)	SWITZERLAND	28	40	YES	
8	ICTSI	PHILIPPINES	10	34	NO	
9	CMA CGM	FRANCE	8	48	YES	
10	EVERGREEN MARINE CORPORATION	TAIWAN	8		YES	



Average distance travelled, grain, other dry bulk, container and oil cargo, 1999–2024, (Nautical miles)



# CHALLENGES

V

## VOLATILITY

The nature and dynamics of change

U

## UNCERTAINTY

The lack of predictability and knowledge

C

## COMPLEXITY

The multiplicity of factors involved

A

## AMBIGUITY

The difficulty of interpreting reality



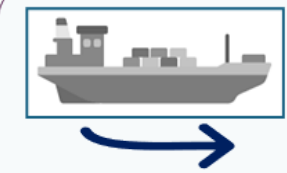
Geopolitical uncertainty



Digitalization



Liner shipping consolidation



Larger vessel development

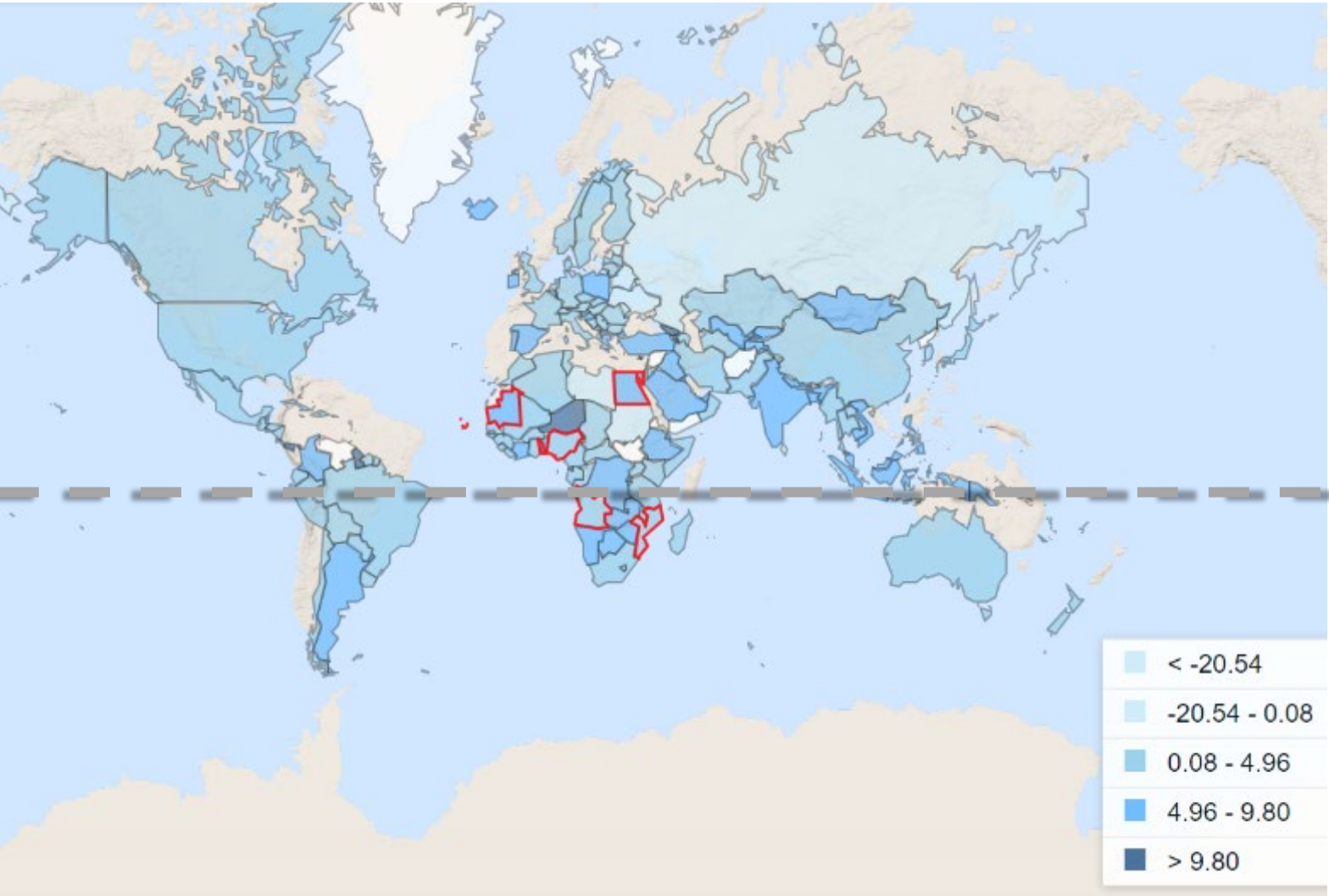


Environmental performance

### VUCA Context

We are currently navigating a deeply **VUCA** environment marked by the early stages of rising tariffs and a noticeable shift back toward 19th-century-style protectionism. While this return to trade barriers is still in its infancy, it remains unclear whether it will solidify into a long-term global trend or whether 21st-century societies, with their interdependence and global outlook, will demand a return to the multilateral trade frameworks established after World War II. In this scenario, forecasting future trends is extremely challenging—and predicting cargo volumes becomes even more complex and uncertain.

# GDP BY COUNTRY 2024



Source: UNCTAD.

- By 2050 India to be most populated country.
- By 2050 Latin America to be almost 800 Million people.

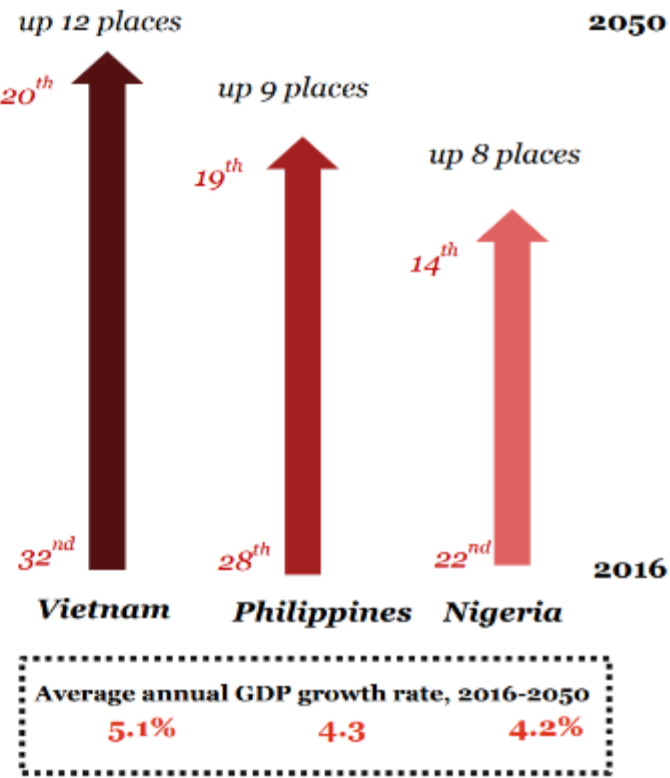
# GDP PROJECTION BY 2050

- Emerging markets will continue to be the growth engine of the global economy. By 2050, the E7 economies could have increased their share of world GDP from around 35% to almost 50%.
- China could be the largest economy in the world, accounting for around 20% of world GDP in 2050, with India in second place and **Indonesia in fourth place**.
- Mexico could be larger than the UK and Germany by 2050, and six of the seven largest economies in the world could be emerging markets by that time.

	2016	2050	
China	1	1	China
US	2	2	India
India	3	3	US
Japan	4	4	Indonesia
Germany	5	5	Brazil
Russia	6	6	Russia
Brazil	7	7	Mexico
Indonesia	8	8	Japan
UK	9	9	Germany
France	10	10	UK

E7 economies G7 economies

Source: PWC report



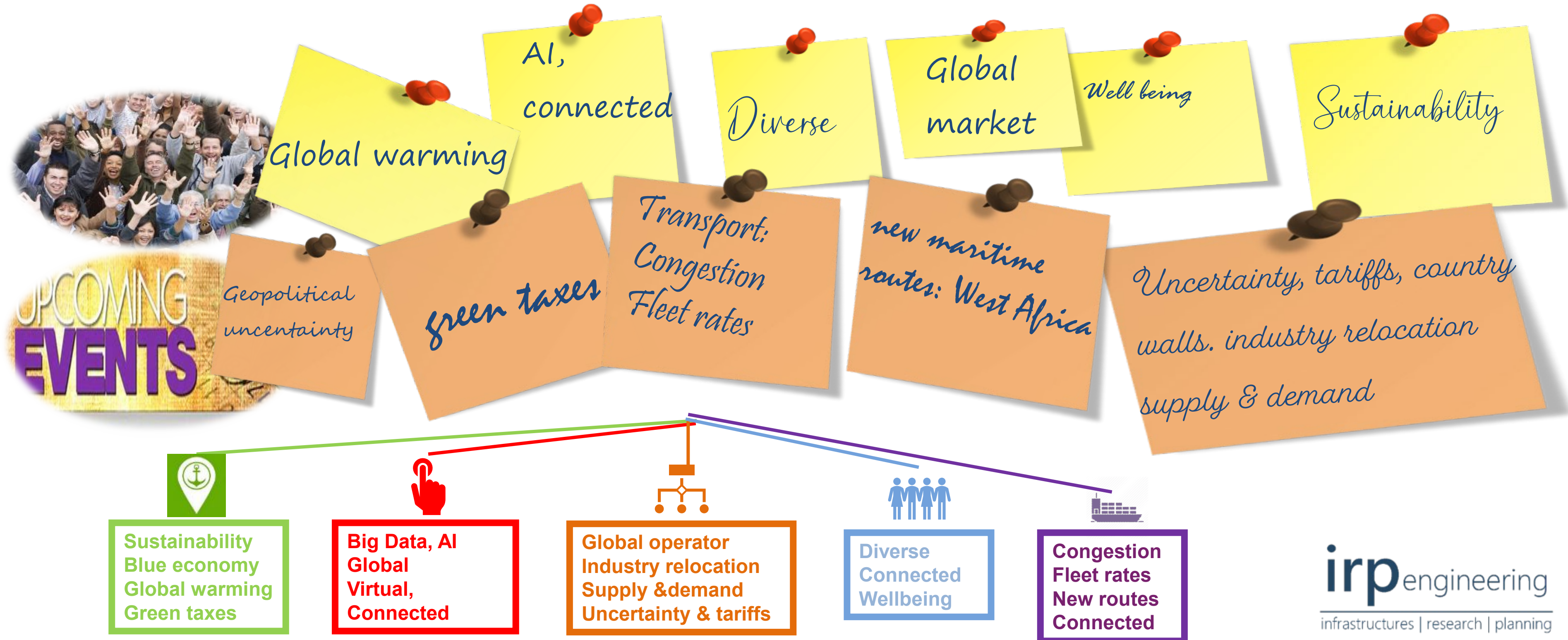


# How to navigate in a VUCA context (Medium term)

The ideas, processes and actions currently present in other sectors are analyzed and transferred to the port sector

Current events and their future repercussions to the port sector are studied

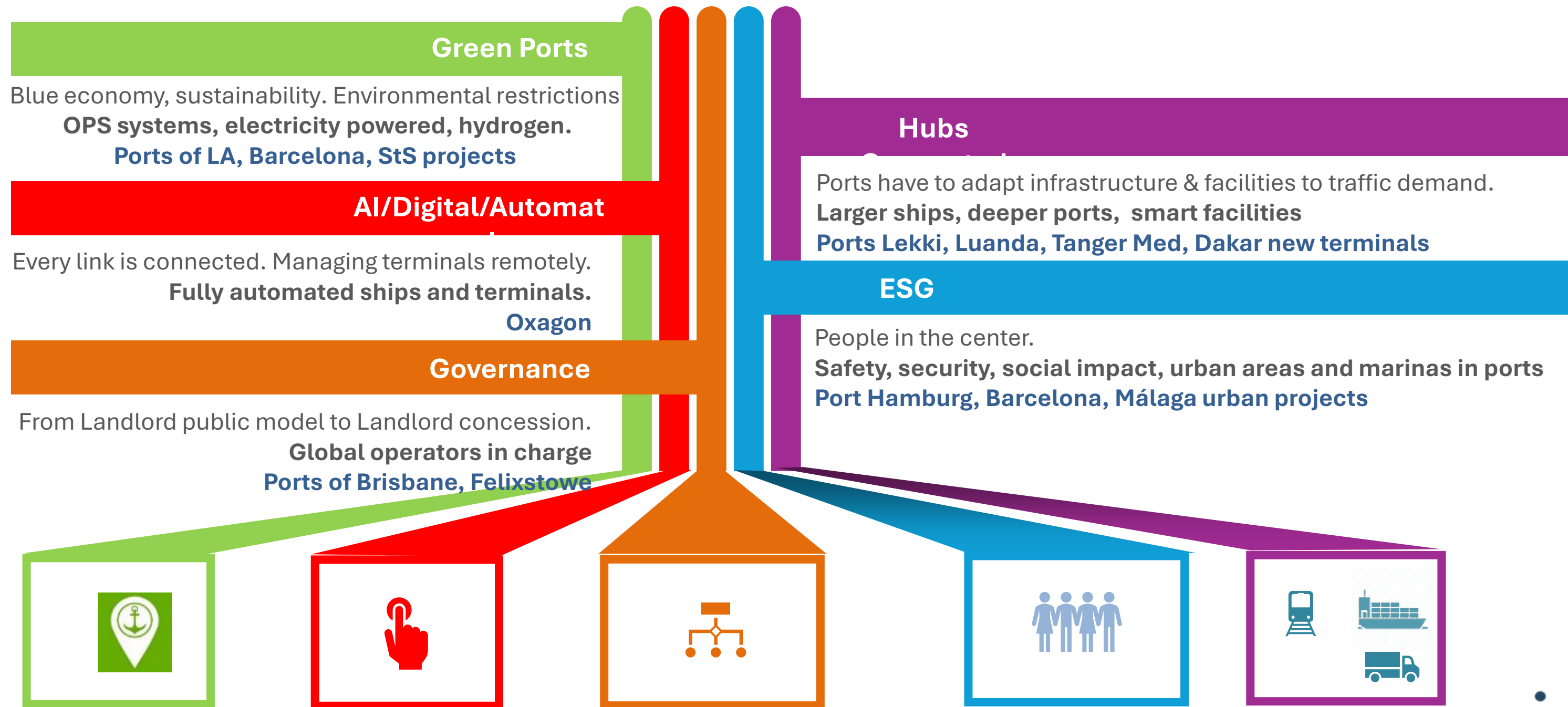
Repercussions of events and actions, processes and events are grouped into 5 concepts that together define the trend in the medium term





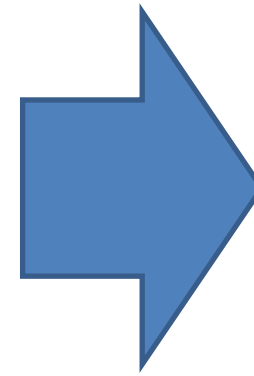
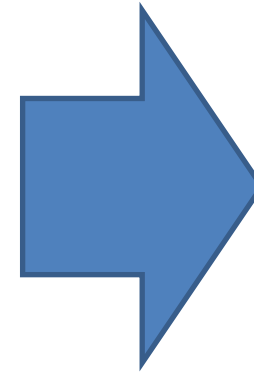
# Port trends ????

Ports have to adjust their strategy, assets, and the way they run to adapt to the upcoming market demands, by linking trends & players in a **global market**





# ...and next?



1. **Power ++**  
Port as energy island
2. **Container =**
3. **Bulk ++**  
Ships, facilities, logistics
4. **Logistic areas +**  
Linked to Bulk traffic  
Linked to 3d printing
5. **Transport connectivity ++**  
Door to door operators  
Port & land infrastructures



# Despite the current challenges, there is hope for the future.



Despite the turbulence, ports remain beacons of opportunity. Global maritime trade has always evolved through moments of crisis—transforming challenges into catalysts for innovation.

Today, amid rising uncertainties, the industry is embracing sustainability, digitalization, and resilient governance. Ports are becoming energy hubs, tech-driven nodes, and urban connectors. While the path ahead is unclear, the direction is forward. The future may be uncertain, but it is full of potential.