

Emerging challenges, opportunities and strategies of ports and terminal operators

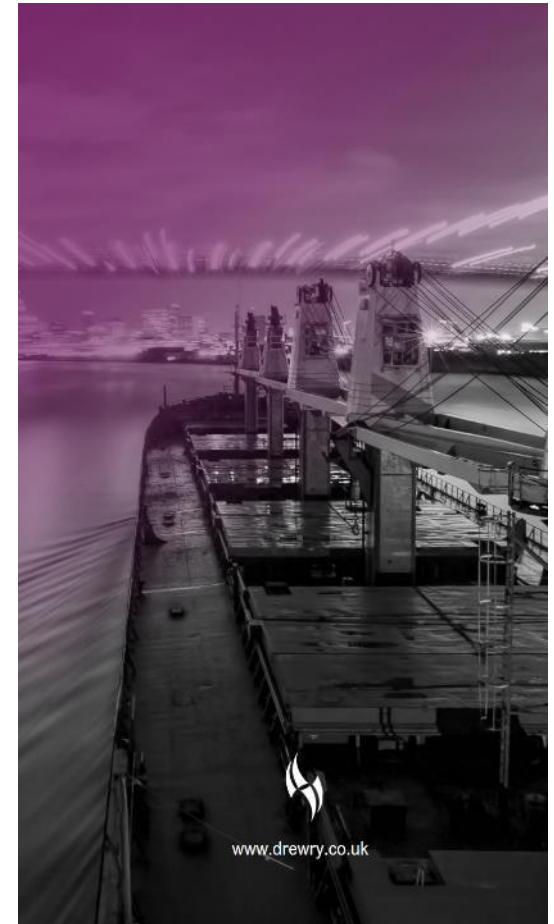
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Who we are

Drewry is the leading international provider of research and consulting services to the maritime and shipping industry with unrivalled experience and expertise across all market sectors from containers and ports to tankers and dry bulk.

From our origins in 1970 London to a 21st century maritime and shipping consultancy, **Drewry** has established itself as one of the most widely used and respected sources of impartial market insight and industry analysis. This in-depth understanding and objectivity provides our clients with the actionable advice and recommendations they need to achieve their ambitions and stay ahead of the market.

We provide our services through four business units: Drewry Maritime Advisors supporting the needs of shipping and financial institutions; Drewry Supply Chain Advisors providing seafreight procurement support to retailers and manufacturers; Drewry Maritime Research publishing market-leading research on every key maritime sector; and Drewry Maritime Equity Research delivering an Investment Research Service on listed companies operating in the industry.



Maritime Research

Maritime Advisors

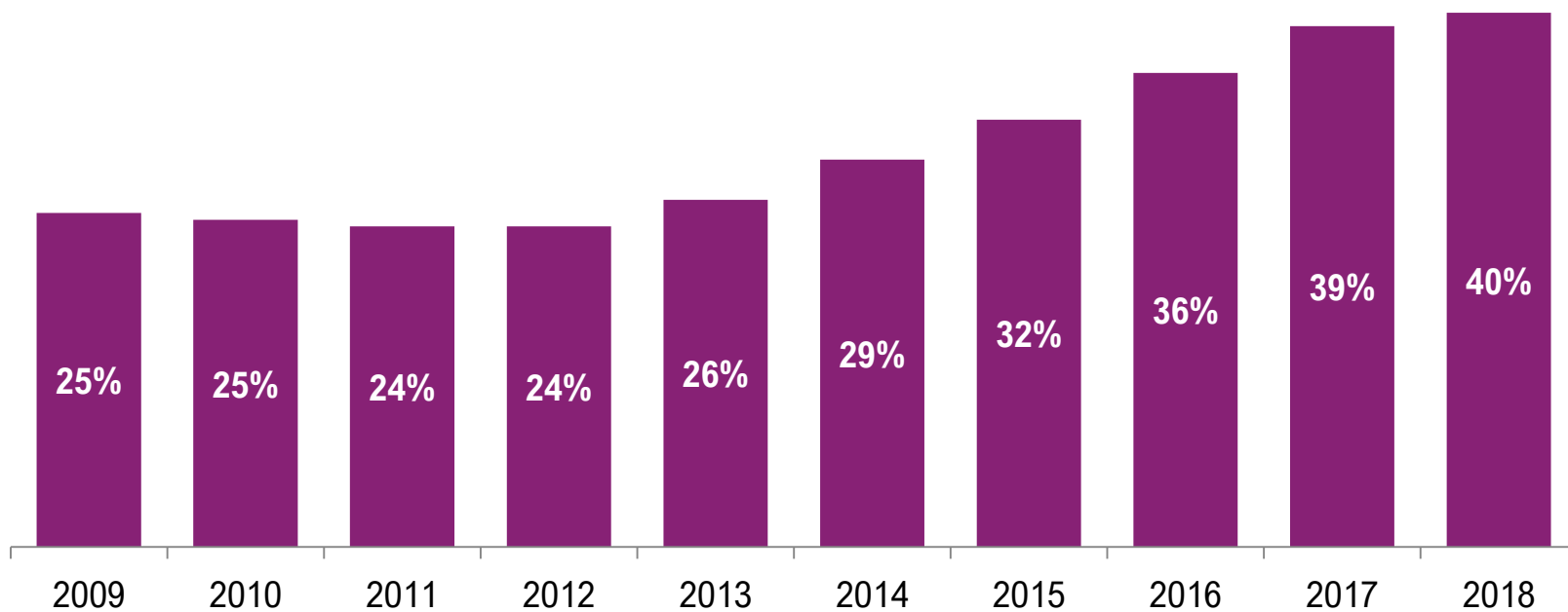
Supply Chain Advisors

Maritime Financial Research

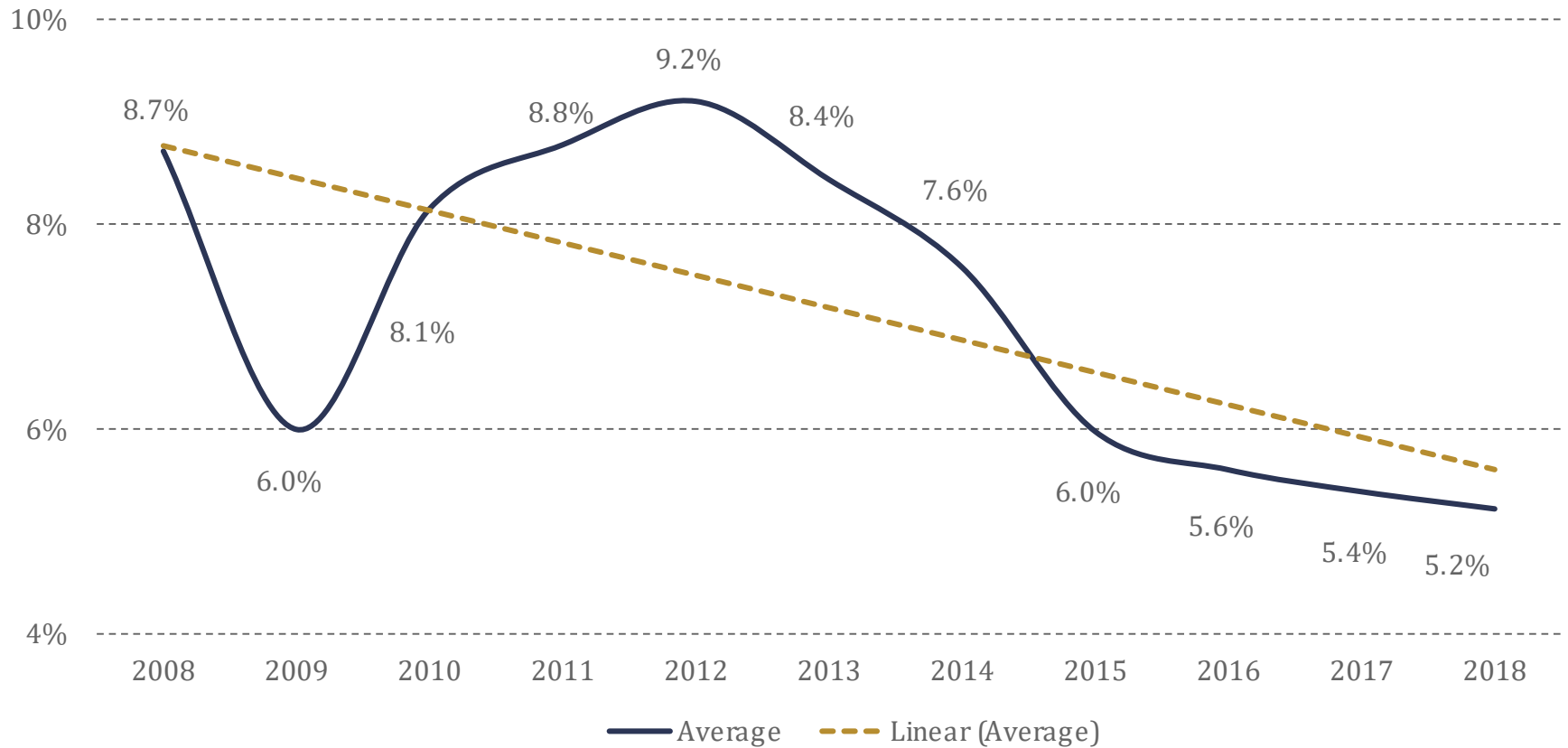
Industry in transition.....market landscape changing rapidly

<i>Global economy – growth resetting to a new normal</i>	<i>Miniaturisation of devices, digitisation of devices</i>	<i>Near-Shoring & On-Shoring</i>	<i>Demographic (Expenditure) Changes</i>	<i>Increasing trade barriers distorting existing trade flows and affecting shipping demand</i>
<i>Significant growth in world cellular container fleet</i>	<i>Drive for bigger ships - Significant growth in ship size deployed</i>	<i>Severe Decline in Freight Rates - Industry struggles to make a profit</i>	<i>Rapid consolidation reshaping the industry</i>	<i>Liner services and Port call trends – Gravitation towards Direct Shipping</i>
<i>Port capacity developments “suitability / fit for purpose” - danger of premature obsolescence</i>	<i>Higher market share volatility / business risks</i>	<i>Local players (SOEs) dominant in certain markets; Intensified competition for new ports</i>	<i>Rise of the hybrids - terminal portfolios owned by carriers - but operated at arm’s length</i>	<i>Competitive focus shifts inland: using ICDs/dry ports to provide supply chain solutions</i>
<i>Cloud computing / Big data / Internet of Things: Digital data storage, analysis, management and processing</i>	<i>Automation (AI) and robotics: improve productivity, performance and worker safety</i>	<i>Blockchain: The future of trade finance?</i>	<i>Hyperloop: The future of freight transport?</i>	<i>Manufacturing technology : 3D printing</i>

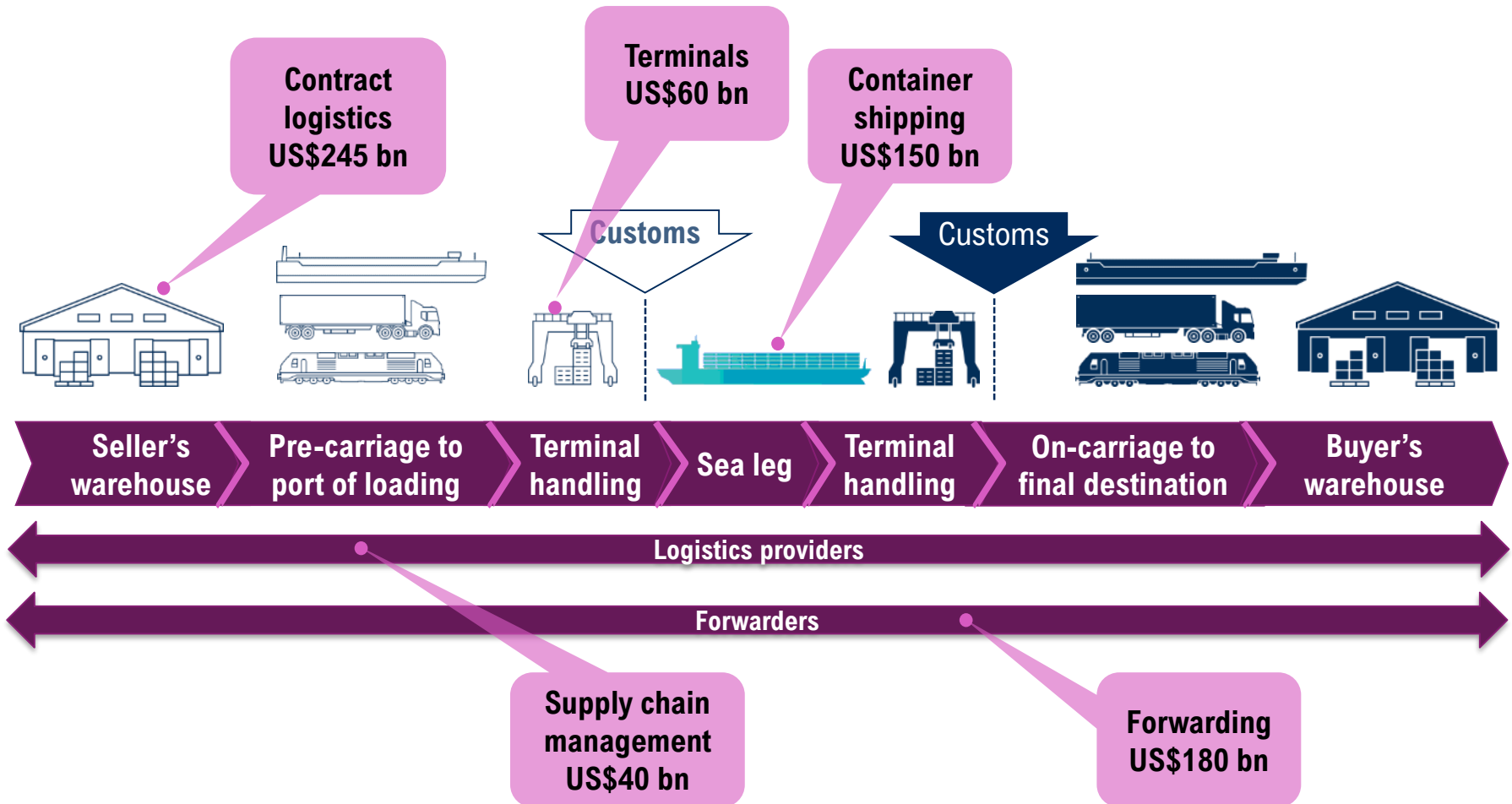
Terminal costs now the largest spend item for carriers



Sample port operators ROIC



Where is the Money?



Environment and sustainability



Maritime Research

Robust, objective market analysis and forecasts to inform business decisions

Market Sectors

Container Shipping
Ports and Terminals
Dry Bulk
Gas Shipping
Tanker Shipping
Specialised Shipping
Ship Management
Logistics Management
Intermodal Transport

Maritime Advisors

Bringing together the expertise, insight and resources clients need to achieve their commercial ambitions

Advisory Expertise

Market Analysis
Strategy and Planning
Market Entry Analysis
Operational Due Diligence
Technical Due Diligence
IPO Support

Supply Chain Advisors

Tools, resources and tailored advice to support every stage of the ocean freight procurement process

Advisory Expertise

Ocean Freight Cost Benchmarking
Ocean Freight Procurement Support
Network Design and Optimisation
Commercial Due Diligence
Hinterland Logistics Analysis

Maritime Financial Research

A truly independent investment research and advisory service on companies operating within the maritime industry

Market Sectors

Container Shipping
Container Manufacturing
Ports and Terminals
Dry Bulk
Gas Shipping
Tanker Shipping

Advisory Expertise

Credit Analysis
Bond Analysis

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