The West Coast South America Container Trades

Europe, including Mediterranean
North America
Far East

Full Report - August 2008
MODULE I

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Sources
THE DYNAMAR CONTAINER TRADES REPORTS SERIES

Since 2004 Dynamar has been publishing reports on specific container liner trades. In essence, these consultancy studies portray a trade from the viewpoint of a carrier that:
- may consider to enter the trade lane under review
- already serves the route and needs to keep track of the latest developments

This explains the basis of these studies that in particular aim at providing:
- An assessment of the size of the trade (volume in terms of full containers)
- An in-depth competition inventory (services, schedules, ships, capacity)

The set up is based upon a proven concept, and develops along the following lines:

Module I:

- General overview:
  - Executive summary of the report’s findings through key facts and figures (number of carriers, services, total volume, total capacity, major ports)
  - Introduction to the trade that briefly highlights the salient points and a general outline of the trade under study; its recent history, development and current situation
  - Summary of the direct ports of call of the services under review
    - Often completed with a wider ports/countries overview
  - Port activity
    - Statistics of port handled TEU in direct ports of call on both sides of the trade
  - Carryings of full TEU in both directions, providing the size of the trade.
    - The set up of this chapter depends on the availability of information but is usually built on statistics of full containers loaded and discharged in the direct ports and/or on the basis of carriers’ full TEU liftings, if available at all. The outcome is often also presented in various regional overviews and analysed from various points of view
  - Commodities
    - Overview of the main moving cargo items in both directions
    - May be completed with additional information on specific cargo flows
  - Container Shipping Services
    - Short trade-related profiles of all vessel providing carriers
    - All direct container services operated (trade names, port rotation, frequency, number and size of ships)
    - Services grid (ports of call sequence), providing the emphasis of the trade in terms of ports used
    - Recent carrier and trade developments
  - Capacity and Trade Share Analyses
    - The annualised trade capacity is analysed by carrier and/or grouping, taking into account such factors as frequencies, non core ports and actual vessel sizes
    - The annualised trade capacities and the overall carryings form the basis for estimates of trade shares/liftings by carrier
  - Hubbing and Transhipment
    - Overview/inventory of connections within the areas with the main direct ports of call
  - Conferences, Discussion Agreements and the like
    - Details of such bodies, if any, governing the trade under review
    - Freight rates, if available and (standard) surcharges
  - Other than container services
    - A broad overview of breakbulk, Ro-Ro and multipurpose operators in the trade, which may incidentally compete for containers
Module II usually provides reference material and detailed information, such as:
- Raw, usually not further analysed statistics, such as TEU per port/country combination,
  and/or, if available:
- Liftings by individual carriers/brands and/or by relevant individual countries, if any
- Other subjects of indirect, but not immaterial interest
- Port projects; port and/or country developments (since the previous report)
- Country economy profiles

Obviously, each individual report may be expanded with additional trade-specific information.
In the case of the 2008 West Coast South America Container Trade publication, this is already
a unique one in the series of Markets and Trades reports, as it covers 3 trade lanes, i.e. WCSA
with the European Union (Europe/Mediterranean), with the USA and with the Far East. Fur-
thermore, three important WCSA trade segments are additionally highlighted in Module II of
the report: Copper, Fresh (Reefer) Produce and Oil.

This wide range of factors and subjects make these reports also of particular interest to other
stakeholders in the subject trade areas, including (alphabetically): consultants, container les-
sors, financiers, forwarders, NVOCCs, port authorities, port developers, shippers, terminal op-
erators, training institutes and others.

It should be noted that Dynamar is generally able to further customise the contents each report
by adding information and analysis to the specific terms of reference of the interested party.

We trust that you find the following pages of use and interest and as always, welcome any
comments or feedback you may have.

Dirk Visser
(Managing Editor)

Dynamar B.V.