

Il long-covid economico, tra inflazione industriale, scarsità e congestione

Sintomo o malattia? Noli e congestioni

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OCEAN FREIGHT NUMBERS

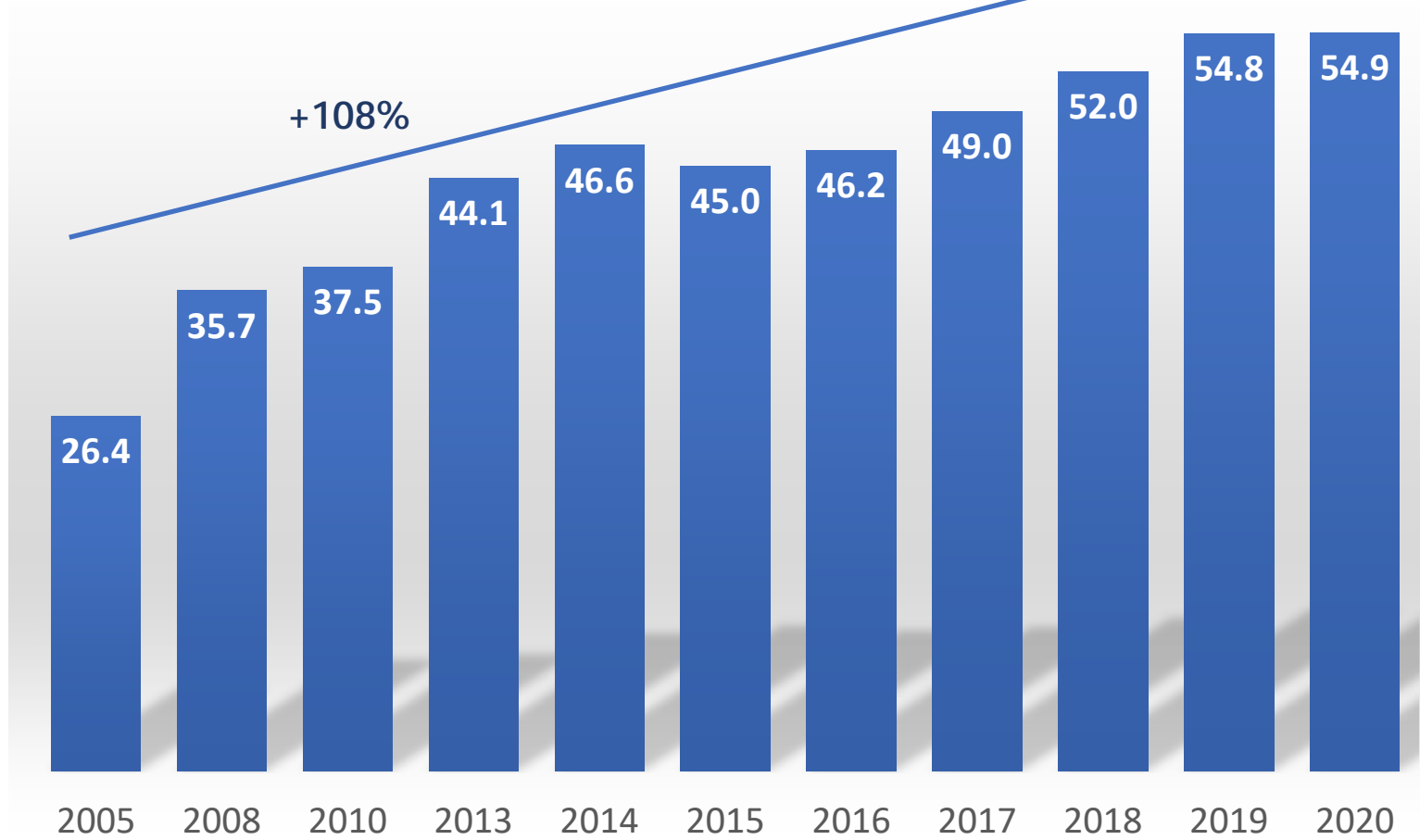
		2019	2020	2021
	Average Container Spot Price (\$) how much does a 40ft container cost on average on the main world routes?	\$ 1.421	\$ 2.171 ↑	\$ 7.556 ↑
	Worldwide container throughput at ports (million TEUs) how many millions of containers are handled every year in world ports?	802	775 ↓	827* ↑
	Carriers Reliability (%) how many times do cargo ships arrive at the ports of destination <i>on time</i> ?	78%	64% ↓	36% ↓
	Transit Times (days) how many days does it take on average for a shipment to arrive at its destination from China to the USA?	39	49 ↑	68 ↑

Sources: Drewry, Statista, Sea-Intelligence.

* forecast

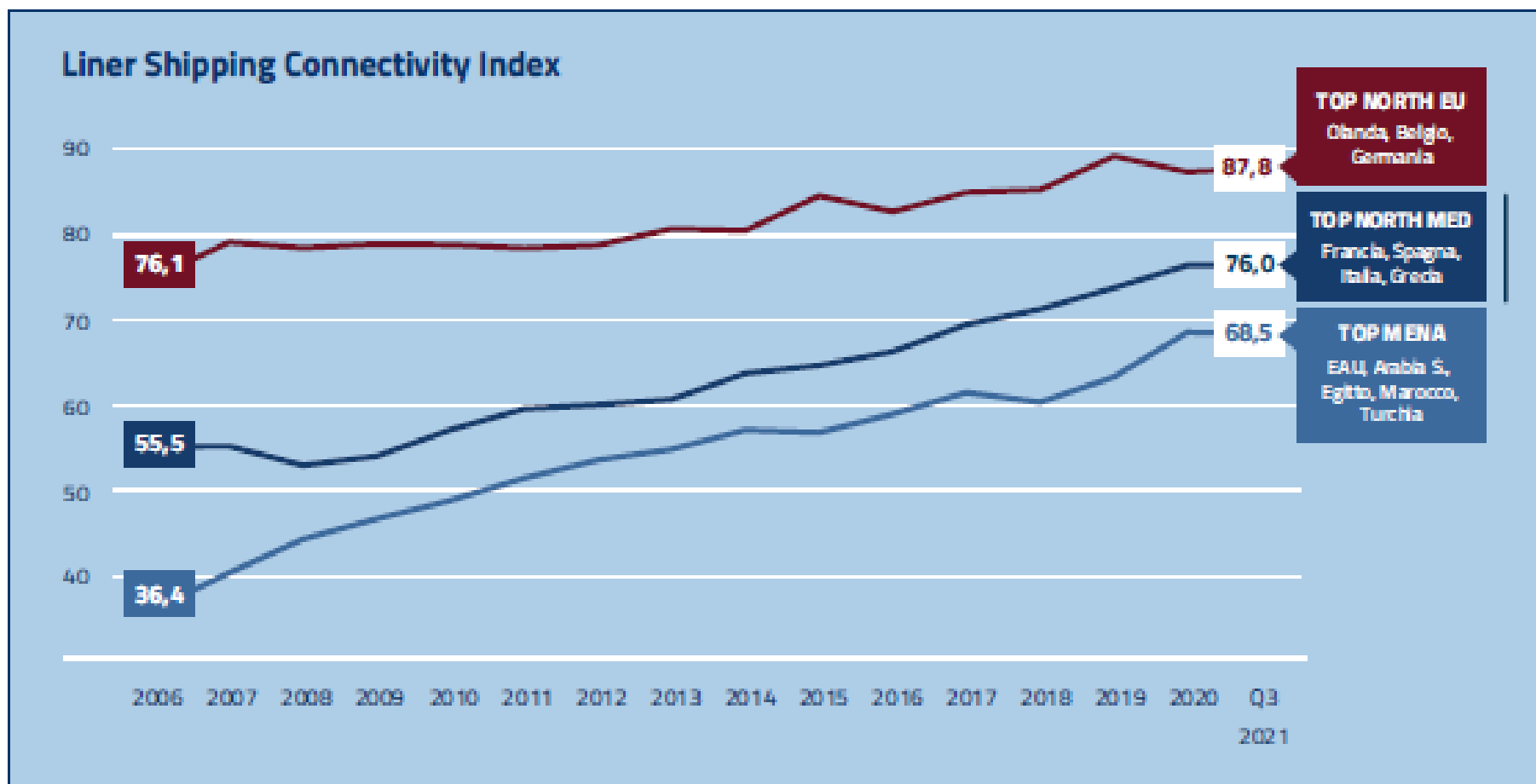
Il Mediterraneo nonostante il tornado non perde traffico

Trend of traffic in the Top 25 Med Ports 2005-2020
(Million TEUs)



Source: SRM on Port Authorities

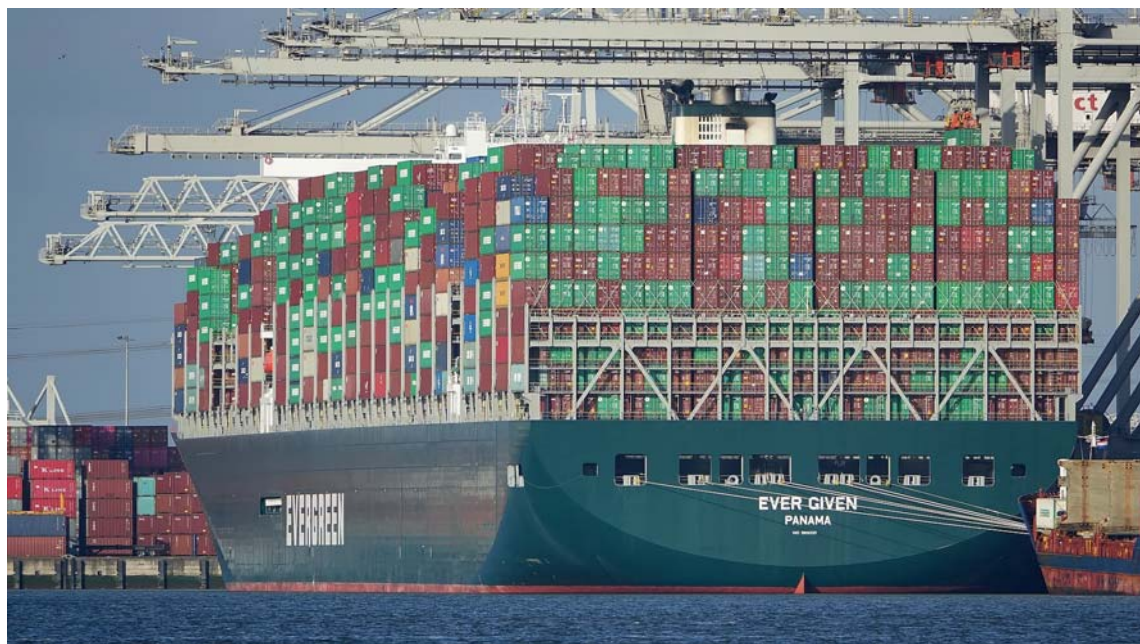
La competitività portuale



- Il Gap dell'area MENA con il North MED passa da 20 punti a 7,5 in 15 anni.

Source: Unctad

Suez ha mostrato quanto fosse debole il sistema logistico mondiale

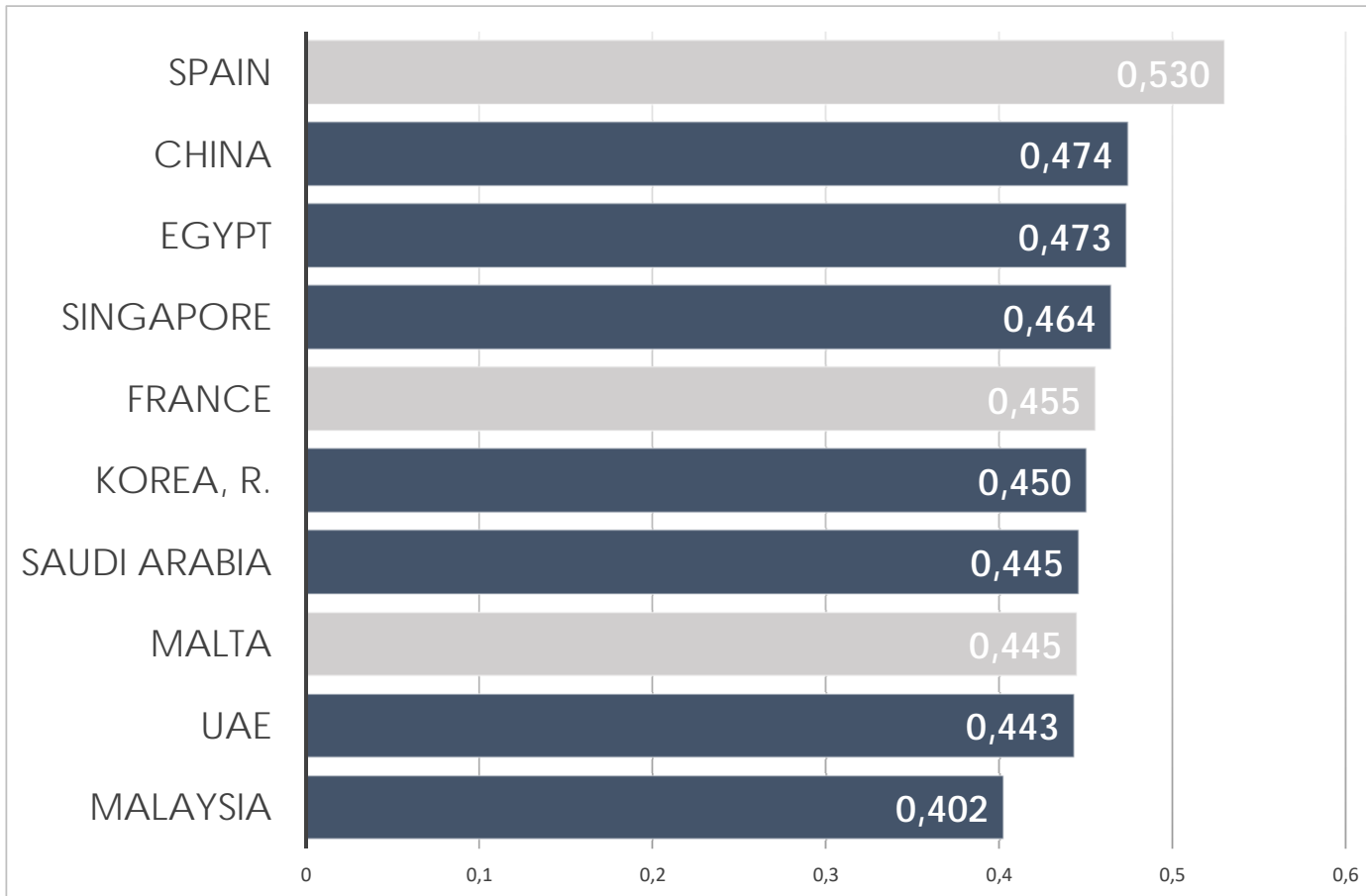


Source: SRM on Suez Canal Authority

1. Mega nave ferma 6 giorni. Disagi per circa 6 mesi.
2. il valore giornaliero delle merci in transito è stato di 9,6 miliardi di dollari, pari circa 400 milioni all'ora.
3. tornato alla ribalta il tema delle Megaships.
4. 420 navi ferme all'imbocco del canale nord e sud, congestione portuale, rimbalzo dei noli.

Le deep sea routes: bilateral connectivity index 2021

Top 10 partners in 2021 - Italy

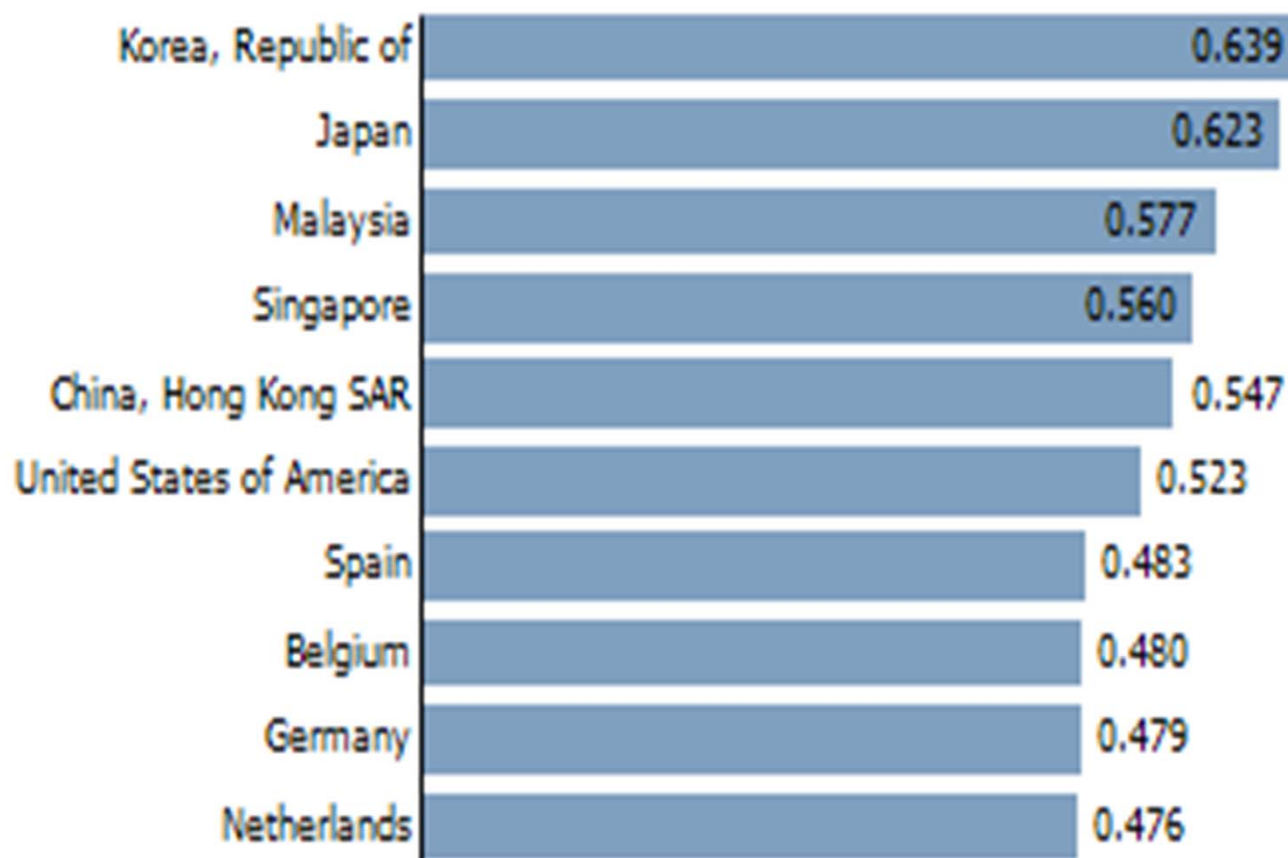


Source: SRM on UNCTAD

- Oltre 80 miliardi di import export italiano passano per Suez ogni anno. Circa il 10% del nostro interscambio.
- 7 dei nostri maggiori 10 partner marittimi sono al di là di Suez o in prossimità.

Le deep sea routes: bilateral connectivity index 2021

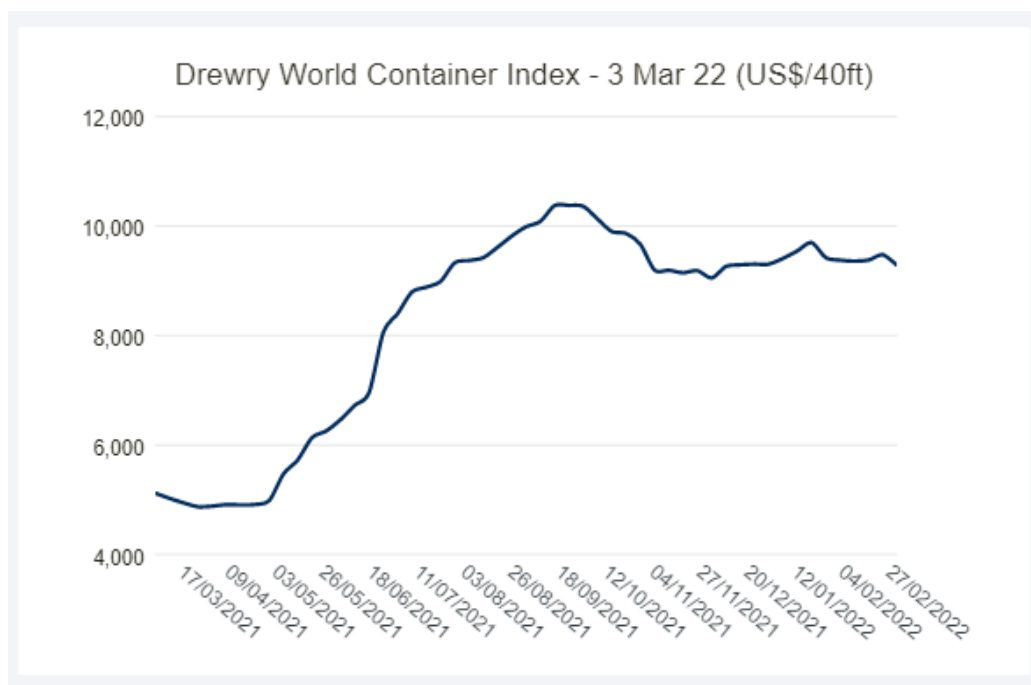
Top 10 partners in 2021 - CHINA



- 6 dei 10 partner strategici della Cina non sono al di là del varco di Suez.
- Spagna, Belgio, Germania e Olanda, sede dei megaporti europei rimangono le sedi preferite delle navi del dragone.

Source: SRM on UNCTAD

Freight rates: il trend delle rotte strategiche



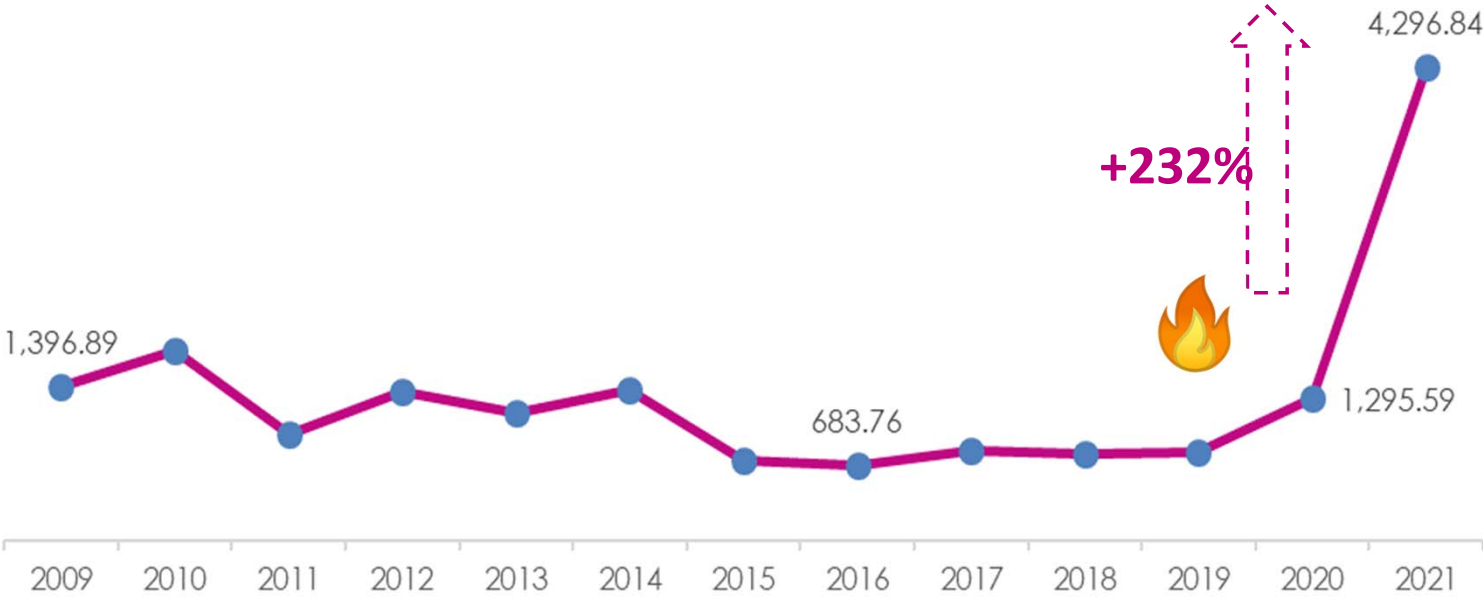
Source: Drewry

Route	Average for December in \$	Average for January in \$	Average for February in \$	MoM change
Shanghai – Rotterdam	13.579 \$	13.857 \$	13.645 \$	↓
Rotterdam – Shanghai	1.556 \$	1.495 \$	1.416 \$	↓
Shanghai – Genoa	12.740 \$	12.791 \$	12.750 \$	↓
Shanghai – Los Angeles	10.059 \$	10.757 \$	10.678 \$	↓
Los Angeles – Shanghai	1.307 \$	1.274 \$	1.274 \$	=
Shanghai – New York	12.984 \$	13.624 \$	13.247 \$	↓
New York – Rotterdam	1.186 \$	1.244 \$	1.222 \$	↓
Rotterdam – New York	6.265 \$	6.280 \$	6.467 \$	↑

- Drewry's composite World Container Index scende del 2.1% portandosi a \$9,279.46 per 40ft container, ma rimane dell'81% più alto rispetto allo scorso anno.

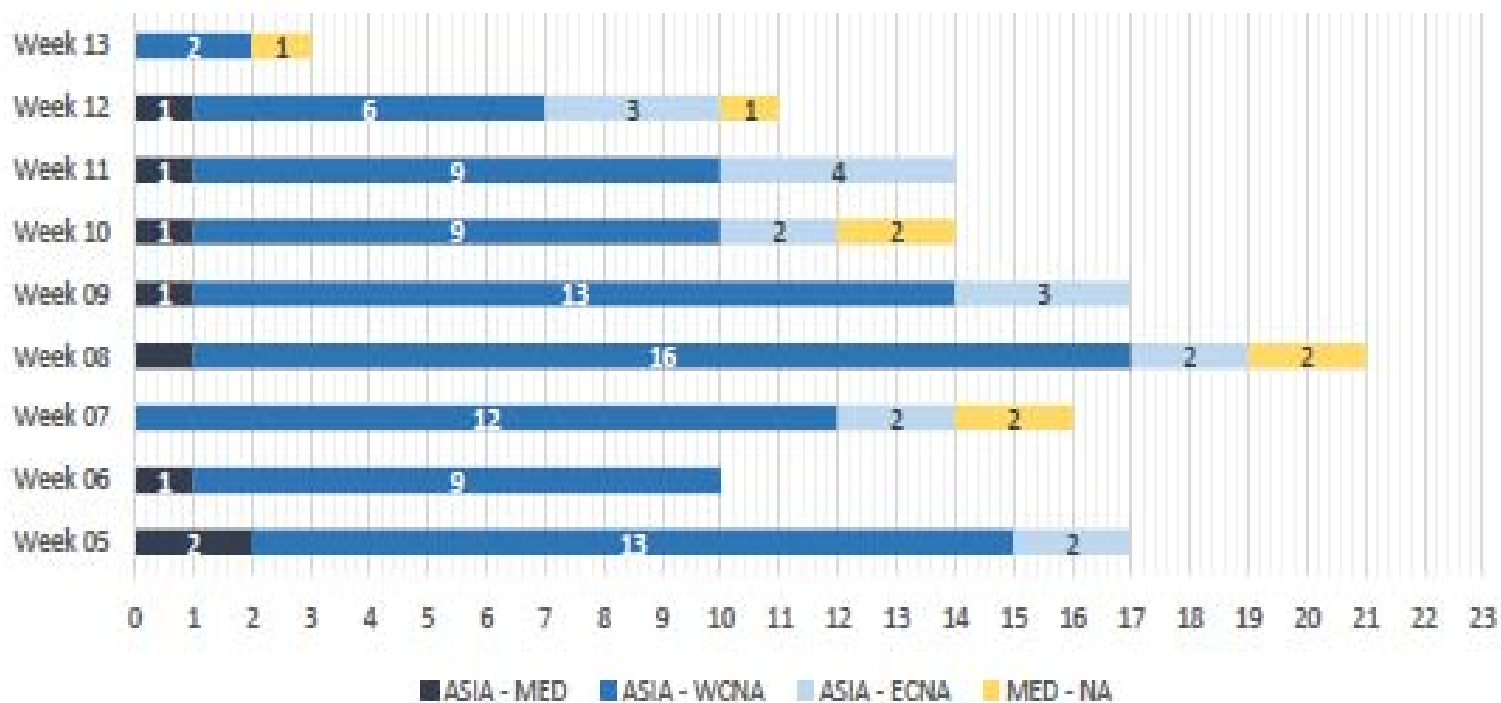
SCFI Asia – Med ha raggiunto rialzi storici

SCFI Shanghai-Med (base port) Freight Rate - \$/TEU



Source:
SRM on Clarksons

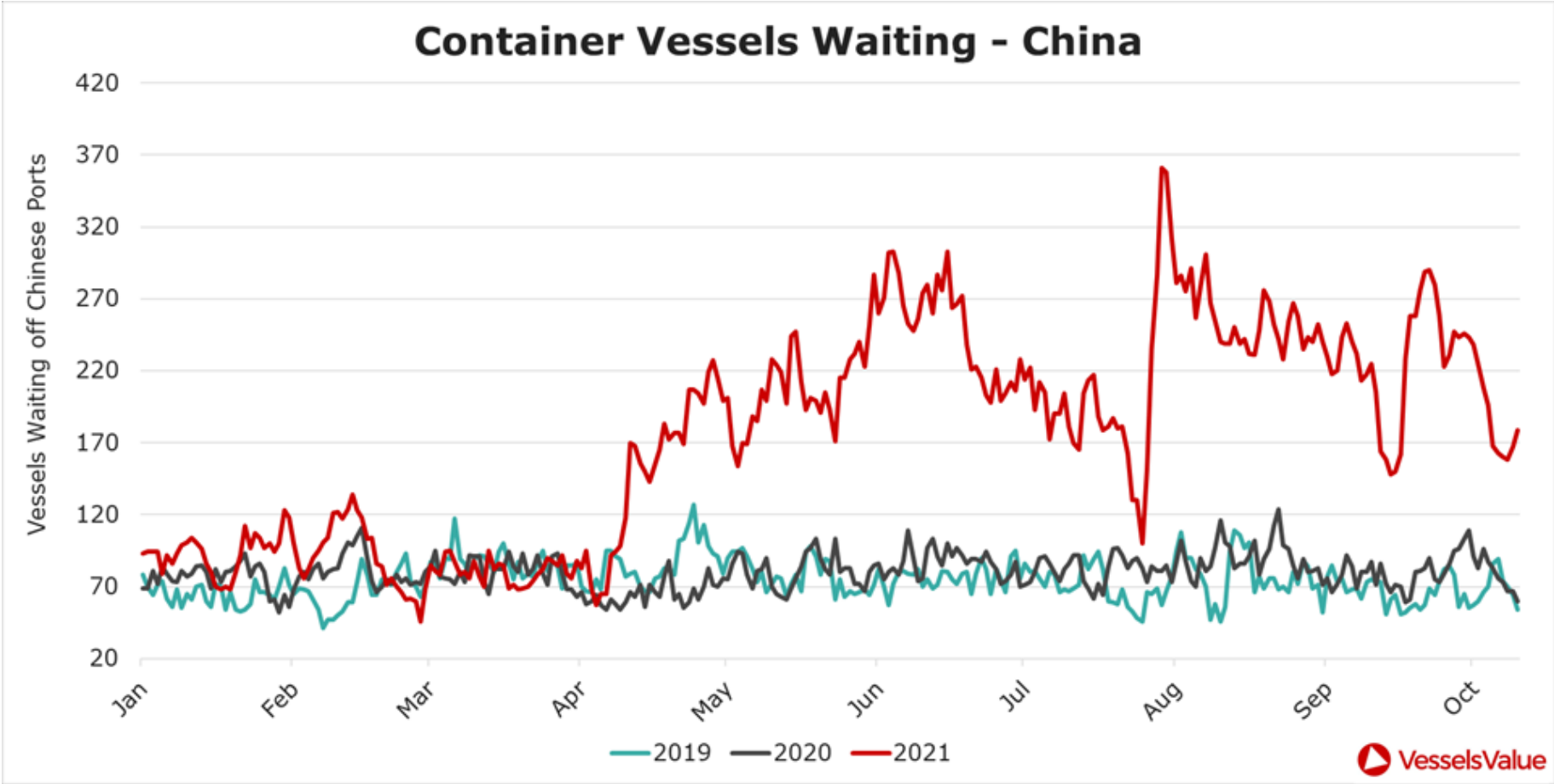
Blank sailing



- Blank sailing soprattutto sulla rotta blu ASIA WCNA

Source: DB Group

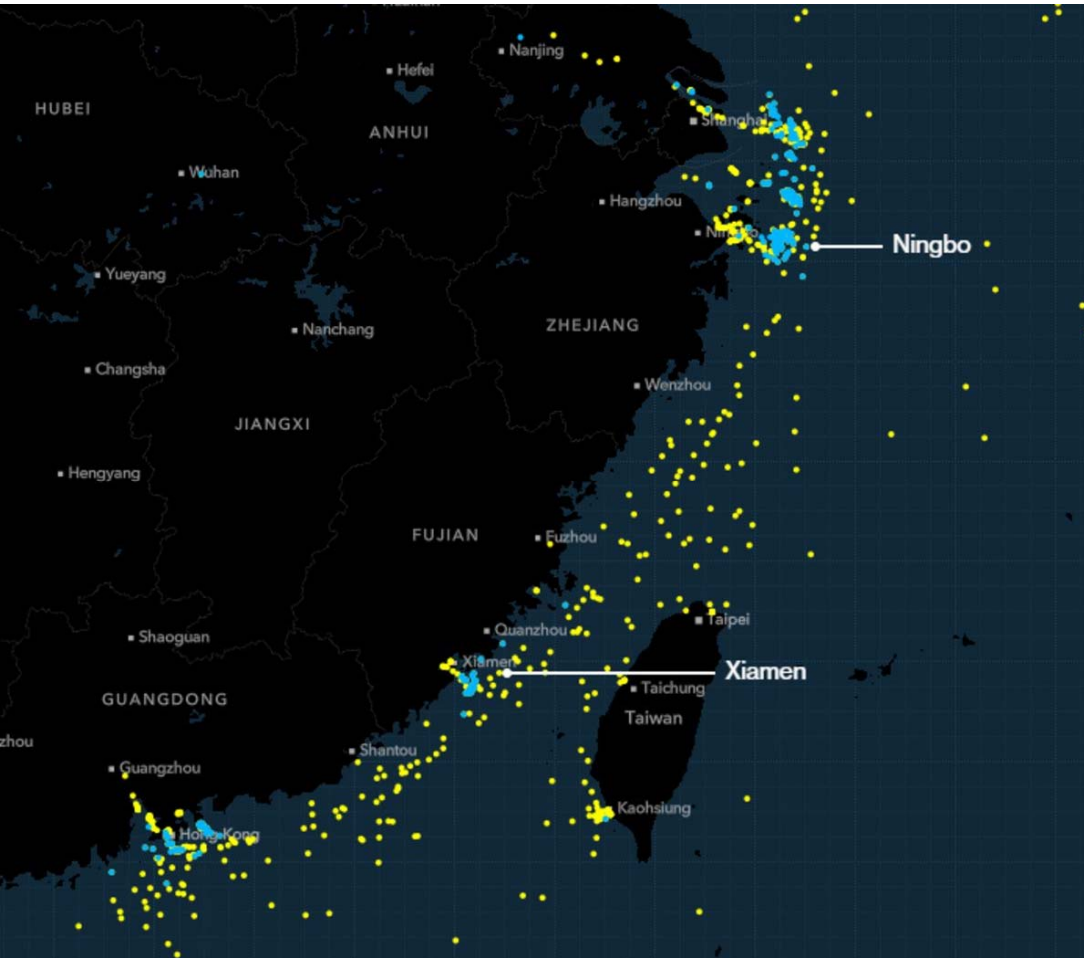
La Port congestion



Source: SRM on Hellenic Shipping News



La Port congestion



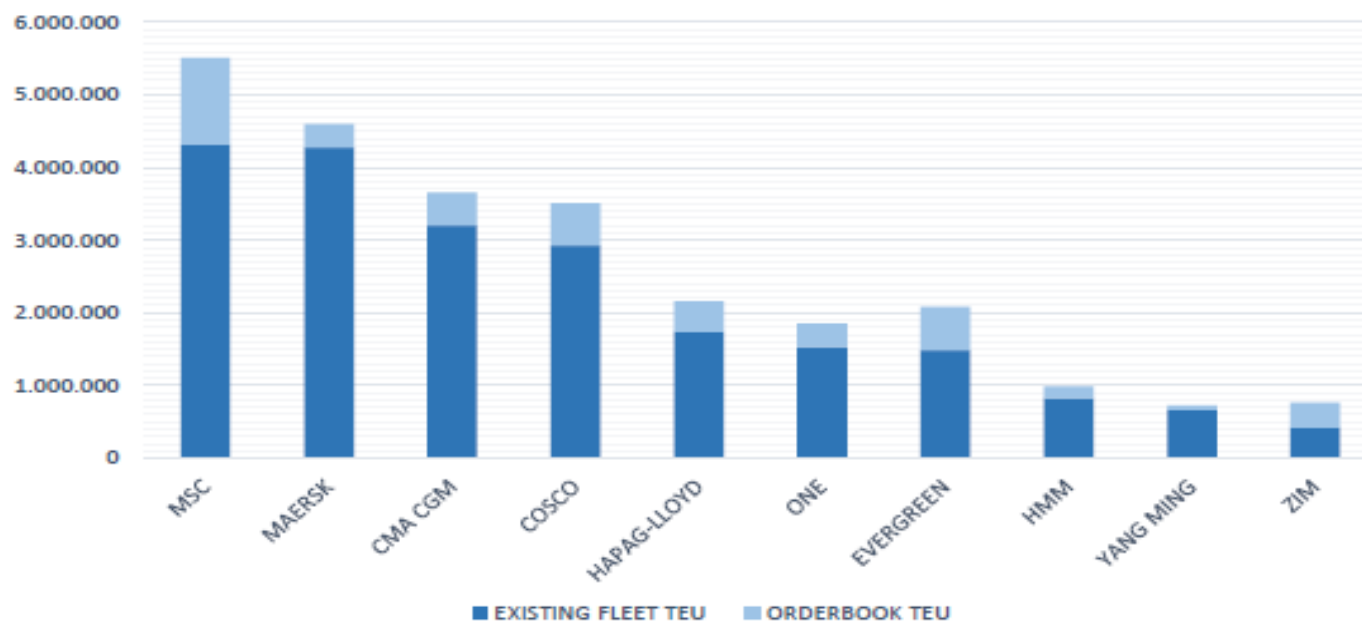
- Omicron ha devastato un Sistema logistico

Source: SRM on Bloomberg



Orderbook: tutti i maggiori carrier hanno navi negli ordinativi

Capacity and Orderbook (TEU) by Carrier



Weekly Capacity by Trade-Lane
(W04 vs W52 - 2021)

Trans - Pacific
675.208 TEU
(+1,7% M-o-M)

Far East - Europe
447.762 TEU
(+0,5% M-o-M)

Trans - Atlantic
150.183 TEU
(-0,2% M-o-M)

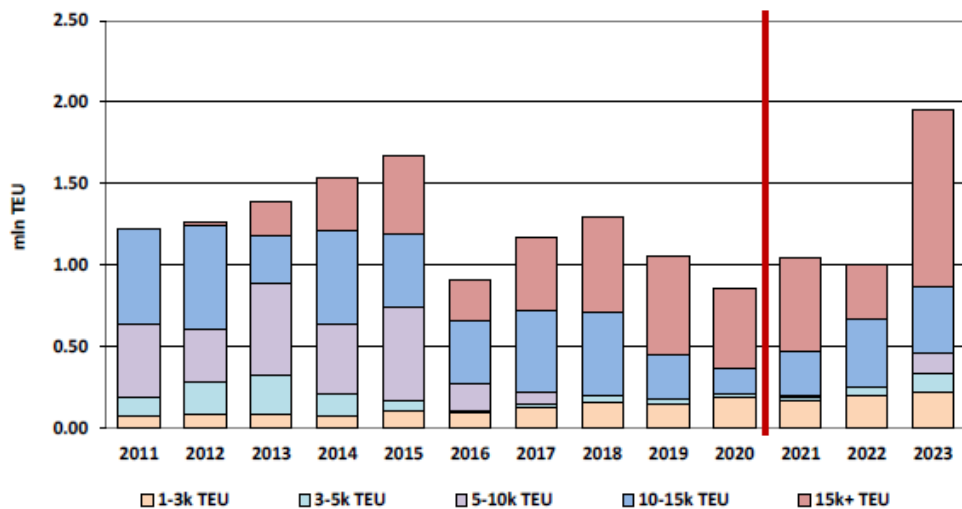
Source: DB Group



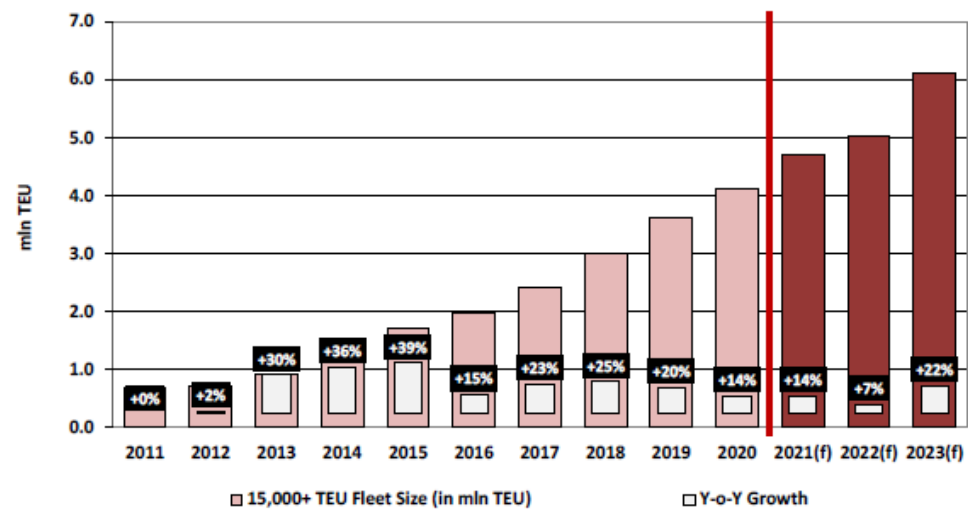
...e sono anche grandi

...oltre 15 mila teus

Containership Deliveries + Orderbook in TEU - Annual
(Nov 2021 ; only units over 1,000 TEU ; in mln TEU ; after assuming slippage)



Projected Ultra Large Containership Fleet Growth
(Nov 2021 ; only units over 15,000 TEU ; in mln TEU ; after assuming slippage and demo)



Source: Banchemo Costa

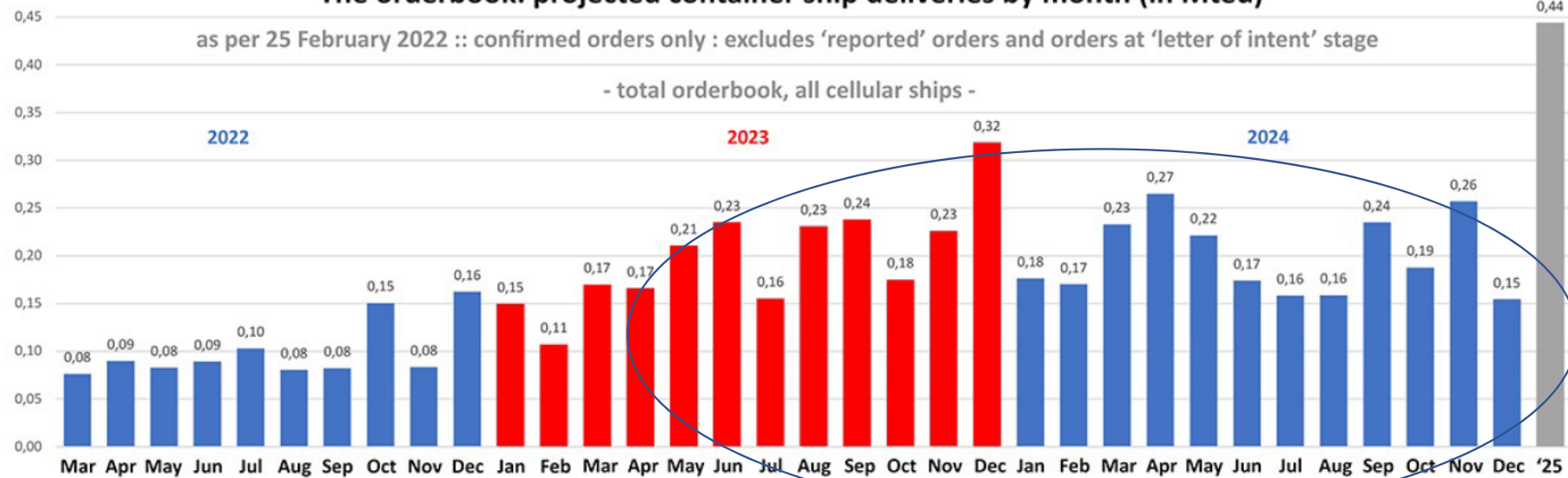


Chart of the week

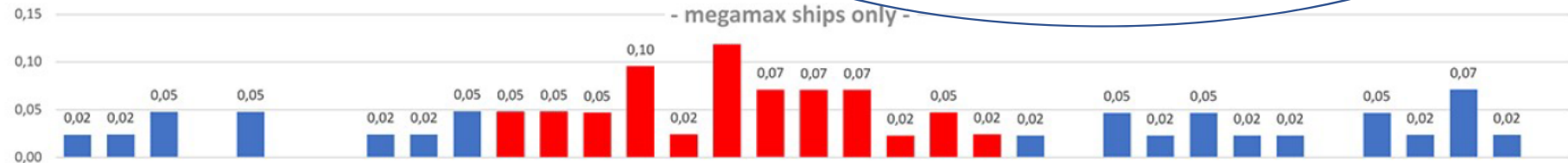
The orderbook: projected container ship deliveries by month (in Mteu)

as per 25 February 2022 :: confirmed orders only : excludes 'reported' orders and orders at 'letter of intent' stage

- total orderbook, all cellular ships -



- megamax ships only -



Source: Alphaliner

- In absolute terms, the 'confirmed' orderbook now stands at more than 6.22 Mteu.
- The vast majority of container ships ordered in the recent boom will only join active service in 2023 and 2024

Il green tonnage:LNG, Methanol and ammonia

vessels with LNG or methanol propulsion

all size classes :: excludes ships described as 'ready' or 'prepared' for alternative fuels such as LNG, methanol or ammonia



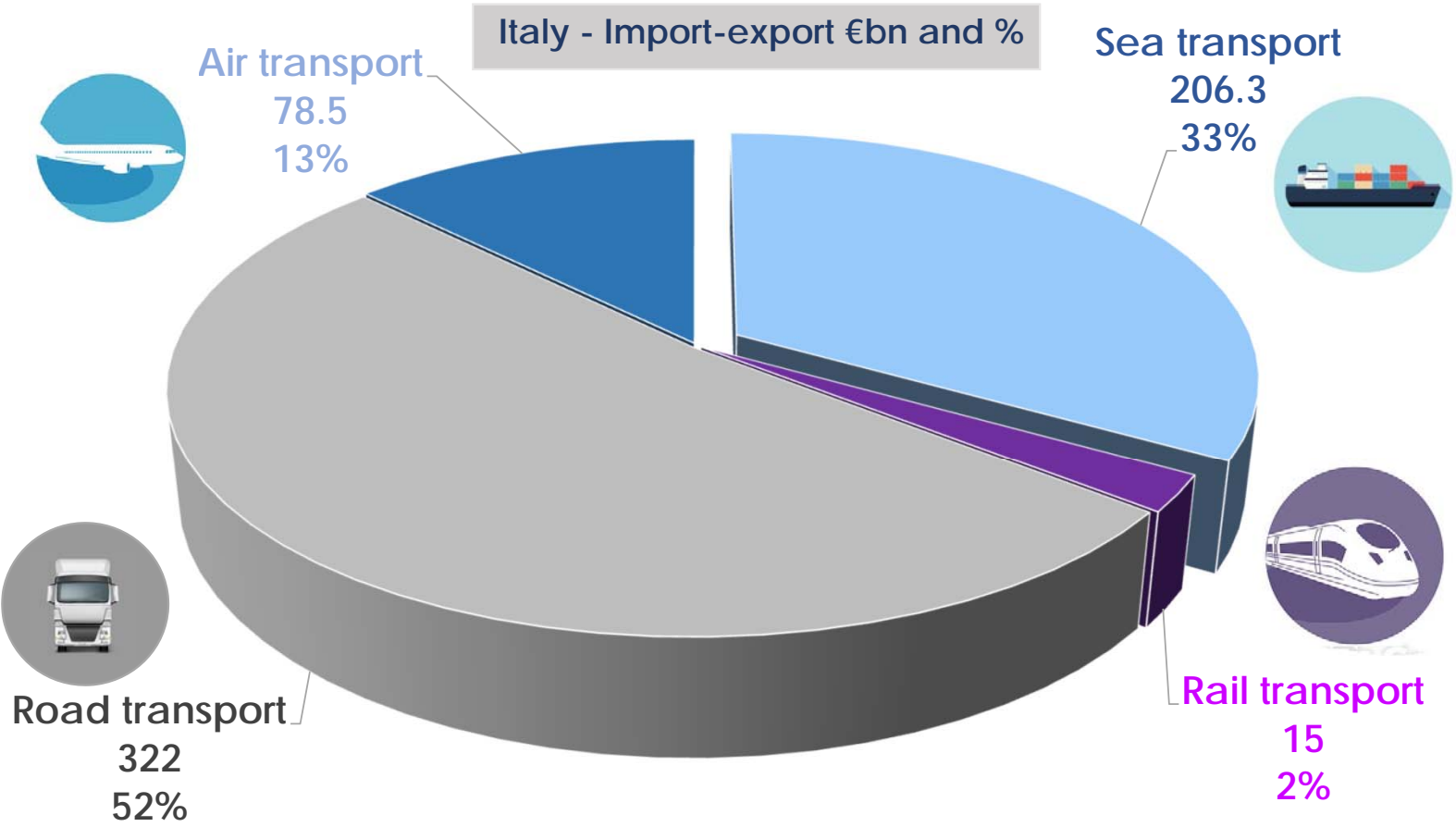
Source: Alphaliner

- Un outlook sulla flotta verde

	2022	2023	2024
LNG or methanol			
	14	37	76
Mteu			
	0.17	0.55	0.90

based on confirmed orders only

Il trasporto via mare rimane forte e solido



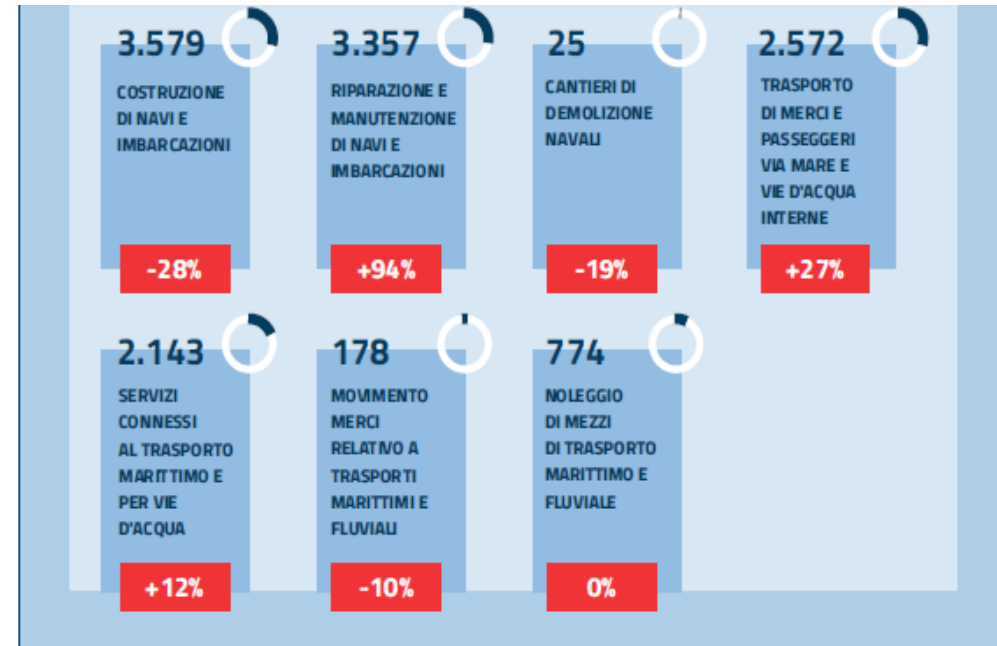
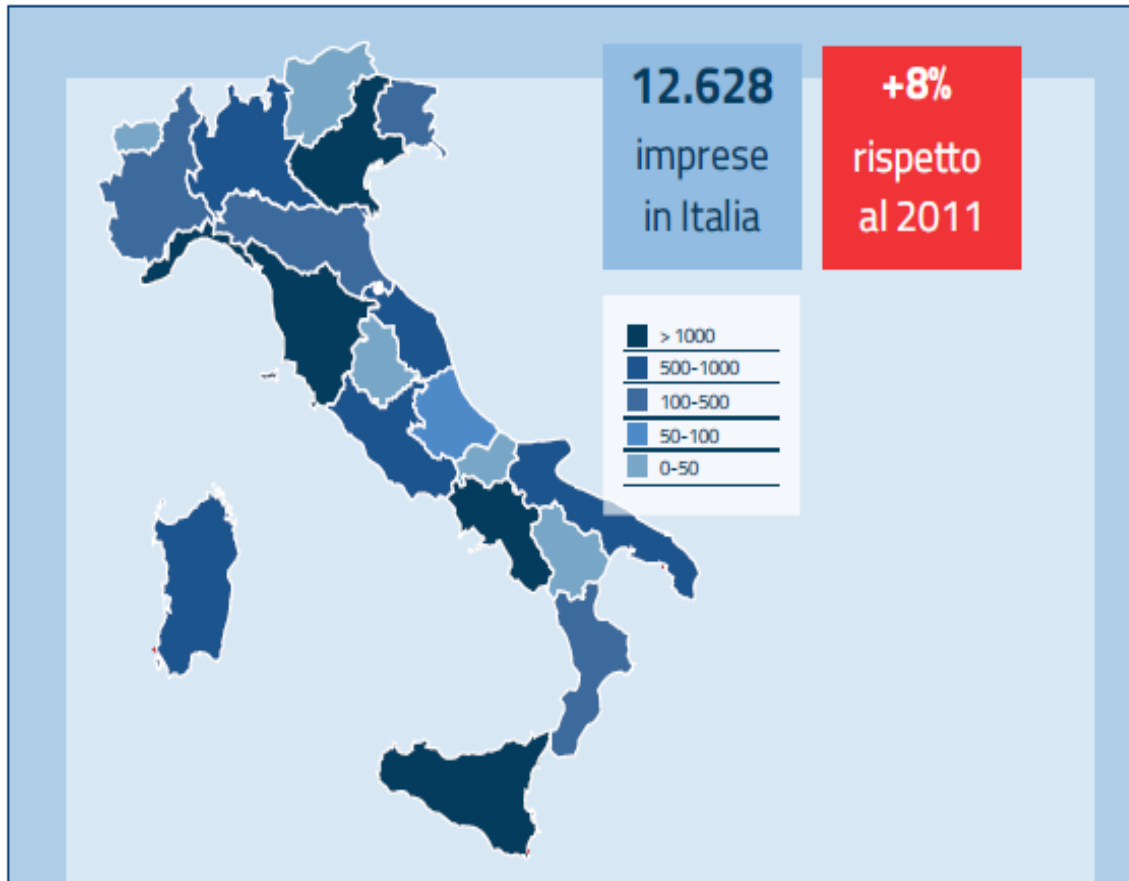
Source: SRM on Istat-Coeweb 2021. Data on 2020

...così come anche la nostra economia marittima



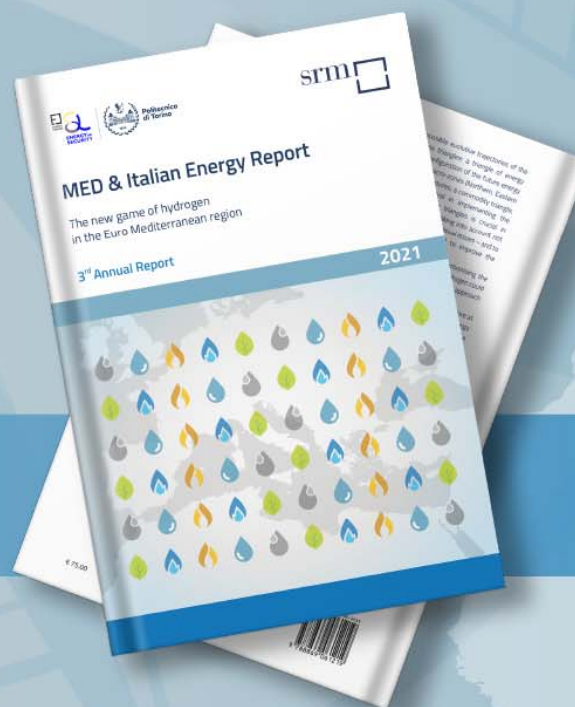
...uno sguardo alla filiera

La filiera delle imprese dello Shipping



Fonte: SRM su Camera di Commercio delle Marche

Scopri i nostri Rapporti Annuali 2021



Acquistali su sr-m.it

* disponibili singolarmente o in abbonamento.