



DAY8 海洋联盟推介会

长荣国际船务青岛分公司营业部亚洲课，专注于中东、红海、印巴、澳洲、非洲、近洋及冷特柜等业务，接下来的时间将共同探讨2024年DAY8产品变化、红海危机下的挑战以及未来工作重点。

保时捷大厦5楼A室

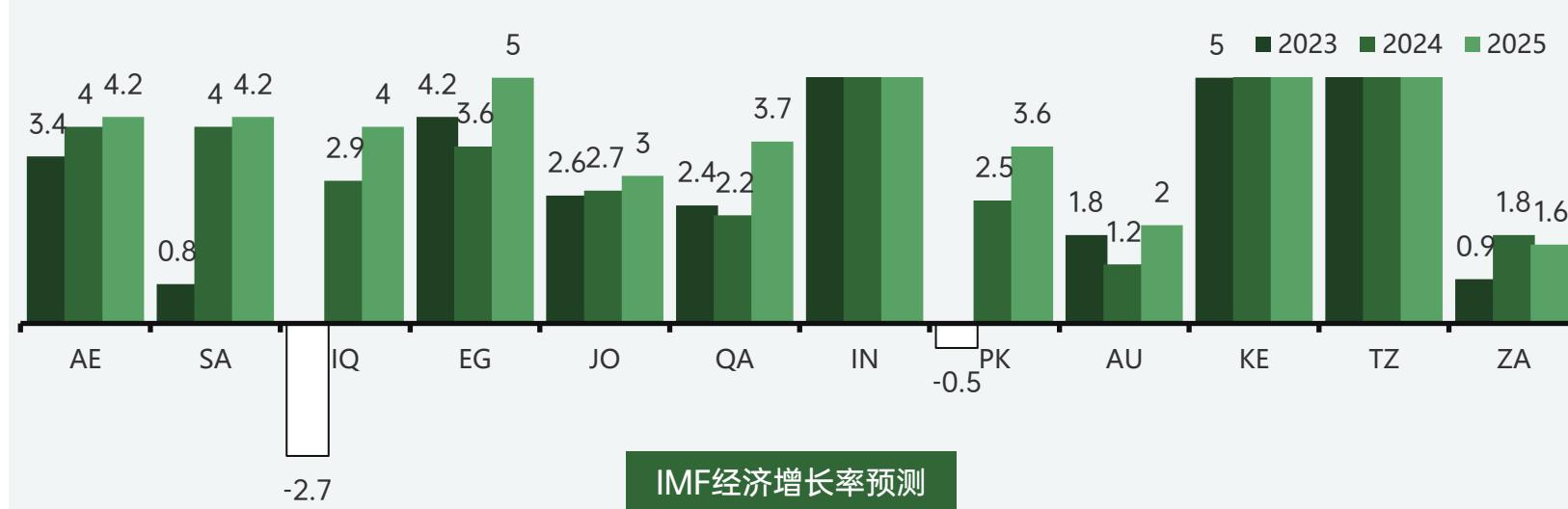
QND-BIZ-IAS

2024年4月9日 周二 9:00~11:00



市场舱位变化

红海危机影响下，中东红海舱位减少，印巴稳定增长，澳洲罢工结束舱位恢复，非洲保持稳定。



长荣舱位变化

中东

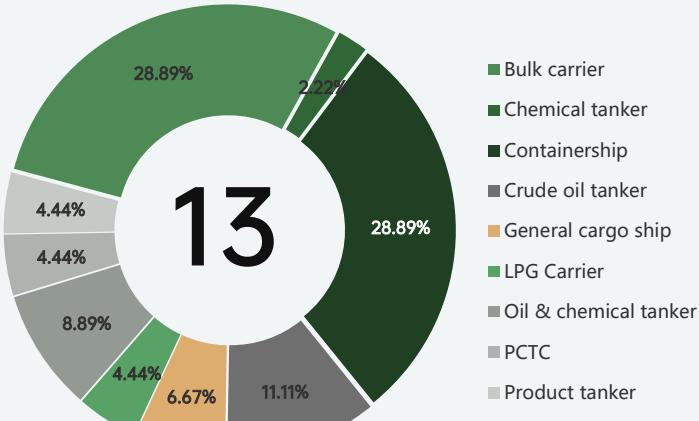


Figure 1.3 Drewry container forecast, 2024

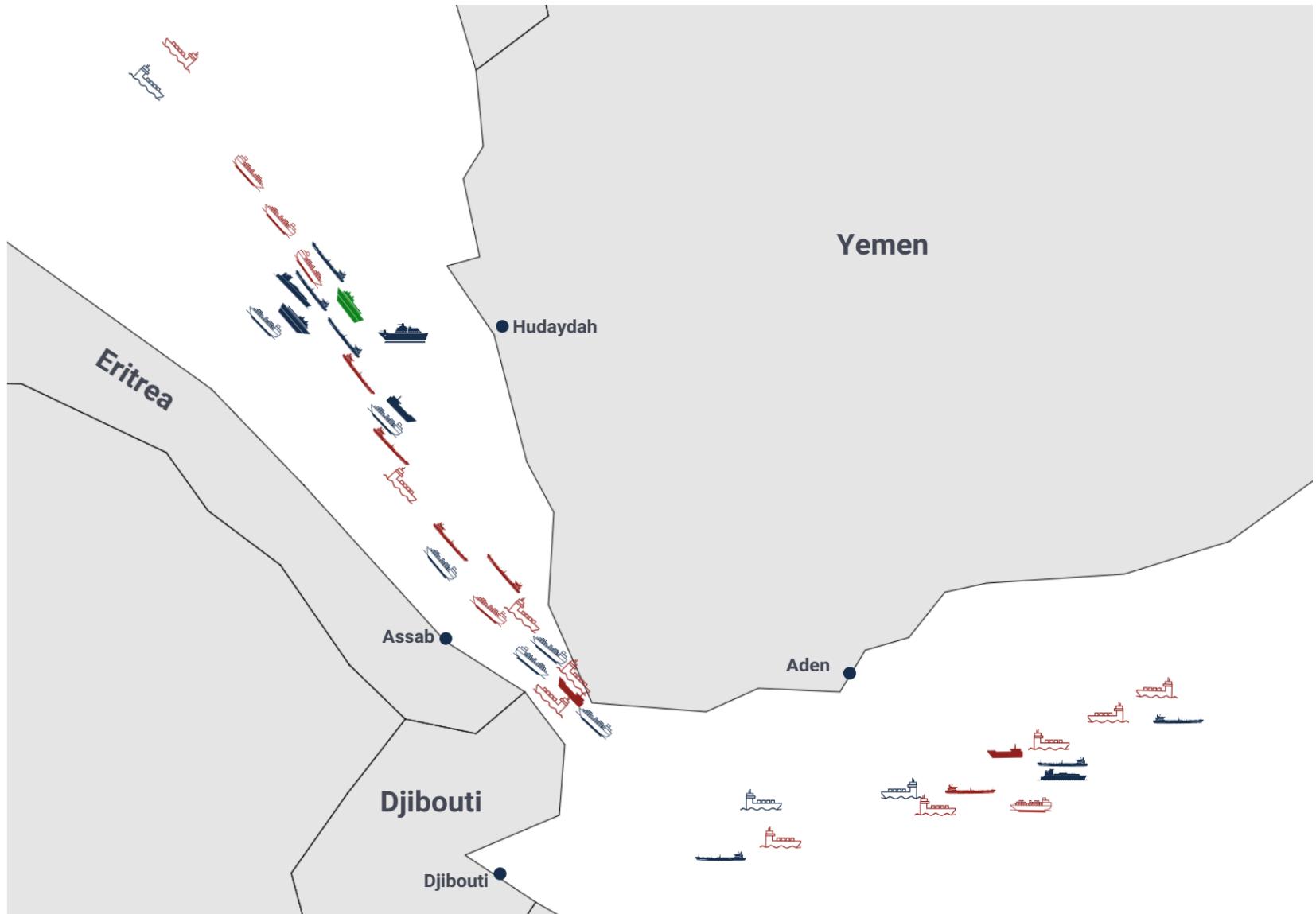




Houthi attacks in the Red Sea and Gulf of Aden



Date	Vessel Name	Incident Type	Flag
2023/12/3	Number 9	Missile	Liberia
2023/12/14	Maersk Gibraltar	Missile	Hong Kong
2023/12/15	Al Jasrah	Missile/Drone	Liberia
2023/12/15	MSC Palatium III	Missile	Liberia
2023/12/18	MSC Clara	Missile/Drone	Liberia
2023/12/26	MSC United VIII	Missile	Liberia
2023/12/30	Maersk Hangzhou	Armed approach	Singapore
2024/1/2	CMA CGM Tage	Missile/Drone	Malta
2024/1/24	Maersk Detroit	Missile	USA
2024/1/24	Maersk Chesapeake	Missile	USA
2024/2/1	Koi	Missile	Liberia
2024/3/4	MSC Sky II	Missile	Liberia
2024/3/11	Pinocchio	Missile	Liberia

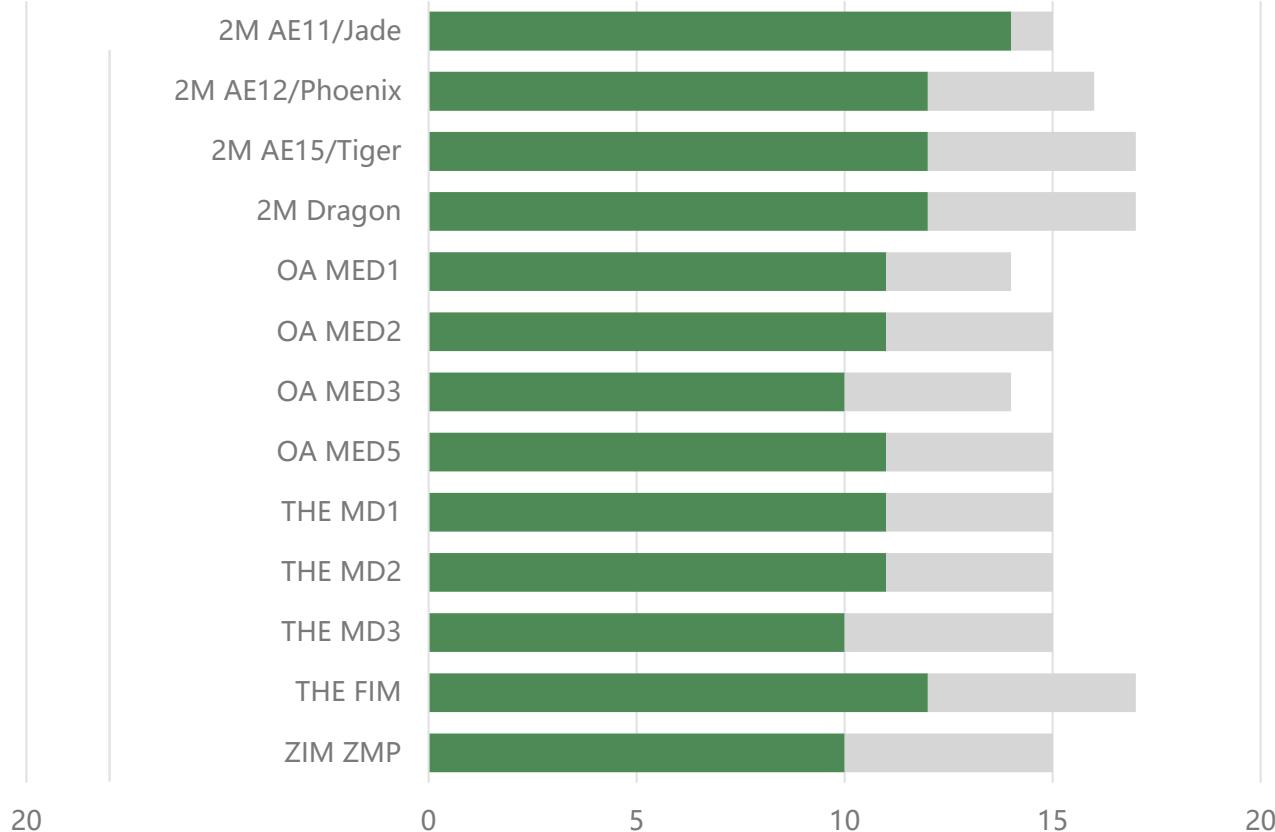
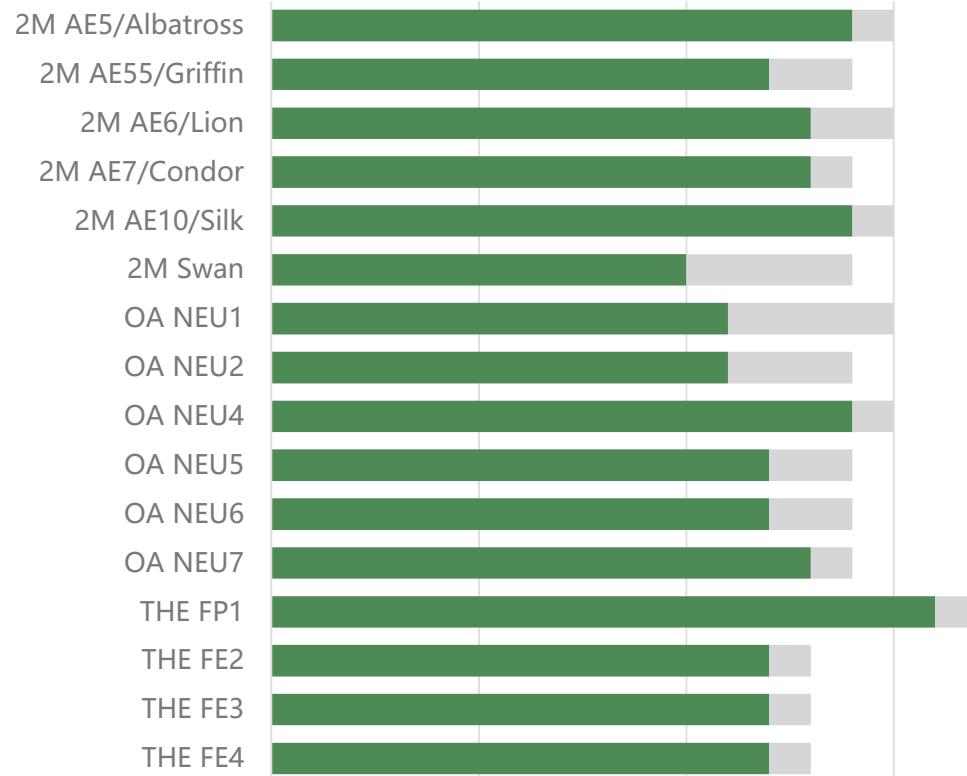




三大联盟欧洲16条航线绕行好望角合计缺船28艘，其中OA联盟6条航线缺13艘，平均每条航线需要补船2艘。



三大联盟地中海13条航线绕行好望角合计缺船53艘，其中OA联盟4条航线缺15艘，平均每条航线需要补船4艘。



004 | 影响因素

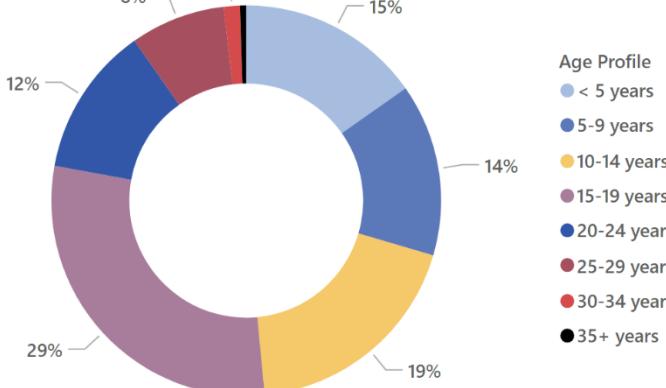
FACTORS



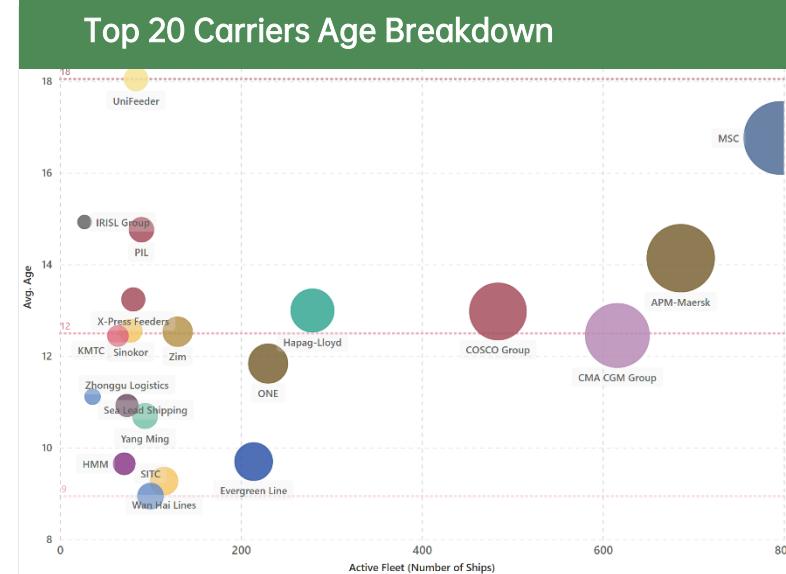
WTI Crude Oil Historical Data from 2014.1 to 2024.3



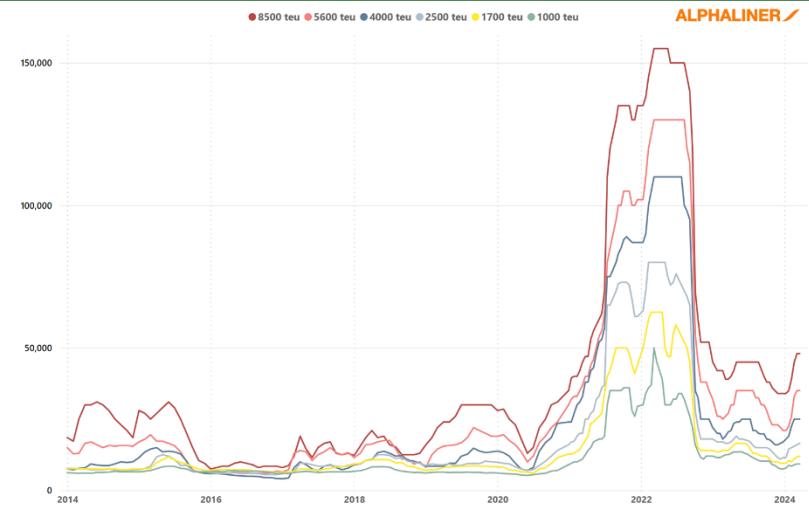
Age Profile Breakdown



Top 20 Carriers Age Breakdown



Charter Rate from 2014.1 to 2024.3





	AMA	CMEX	TPA	AGI	VGX	FRS	RGI
POL	Qingdao Ningbo Shekou	Qingdao Shanghai Ningbo Nansha	Shanghai Ningbo Kaohsiung Shekou	-	-	Tianjin Qingdao Ningbo Nansha Shekou	-
SEA	Singapore	Singapore	Port Kelang W	Laem Chabang Singapore Port Kelang W	Cai Mep Laem Chabang Port Kelang W	Singapore	-
POD	Abu Dhabi Jebel Ali Hamad Dammam Sehar	Jebel Ali Abu Dhabi Dammam	Jebel Ali Dammam* Umm Qasr	Colombo Jebel Ali Karachi Mundra	Jebel Ali Dammam Sohar	Jeddah Sokhna Aqaba	Jebel Ali Jeddah Sokhna
仓位	仓位维持	仓位减少	仓位维持	仓位维持	新增航线 From Feb, 2024	航线暂停 From Dec, 2023	新增航线 From Apr, 2024
策略	限重10吨/TEU 轻货优先	限重10吨/TEU 轻货优先	Dammam自有靠泊	第三地业务	换舱航线 第三地业务	航线暂停	换舱航线 Jebel Ali中转红海



	CIX2	CIX3	FME	FME2	PMX	CIX4	CIX5
POL	Tianjin Qingdao Kaohsiung	Qingdao Shanghai Ningbo Dachan Bay	Busan Qingdao Shanghai Shekou	Qingdao Busan Shanghai Shekou	Shanghai Ningbo Fuqing Shekou	Shanghai Ningbo Shekou	Shanghai Ningbo Shekou
SEA	Singapore Port Kelang W	Port Kelang W	Singapore Port Kelang W	Singapore Port Kelang W Port Kelang N	Singapore Port Kelang N	Singapore Port Kelang W	Singapore Port Kelang N
POD	Nhava Sheva Mundra Colombo	Nhava Sheva Hazira Mundra Colombo	Chennai Visakhapatnam	Chennai Kattupalli	Colombo Karachi Mundra	Nhava Sheva Mundra Karachi	Nhava Sheva Karachi Mundra Colombo
仓位	仓位减少	仓位减少	仓位维持	新增航线 From Mar, 2023	仓位维持	新增航线 From Jul, 2023	新增航线 From Nov, 2023
策略	轻货优先 印度为主	轻货优先 Hazira为主	轻货优先 Chennai为主	轻货优先 Chennai为主	中转航线 Karachi为主 挂靠K&P港	中转航线 Karachi为主 挂靠S港	中转航线 Karachi为主 挂靠S港



	NEAX	AEF	ASEA	FAX	ASA
POL	Busan Qingdao Shanghai Ningbo Yantian	Qingdao Shanghai Ningbo Nansha	-	Qingdao Shanghai Ningbo	Kaohsiung Xiamen Hong Kong Nansha Shekou
SEA	-	Singapore Port Kelang W	Singapore Tanjung Pelepas Port Kelang W	Singapore	Singapore
POD	Sydney Melbourne Brisbane	Mombasa	Dar Es Salaam	Durban	Durban Cape Town
仓位	仓位维持	仓位增加 航线改造 From Oct, 2023	仓位维持	仓位维持	仓位维持
策略	逢自有船仓位充足 Melbourne为主	小柜轻货 Mombasa为主 可揽收乌干达	小柜轻货 Dar Es Salaam为主	轻货为主 逢自有船仓位充足 Durban为主	小柜轻货 Cape Town为主



市场舱位变化

受惠于产业转移，马来西亚、越南、印尼及菲律宾在近10个月改组升级或新增13条航线。



长荣舱位变化

新加坡

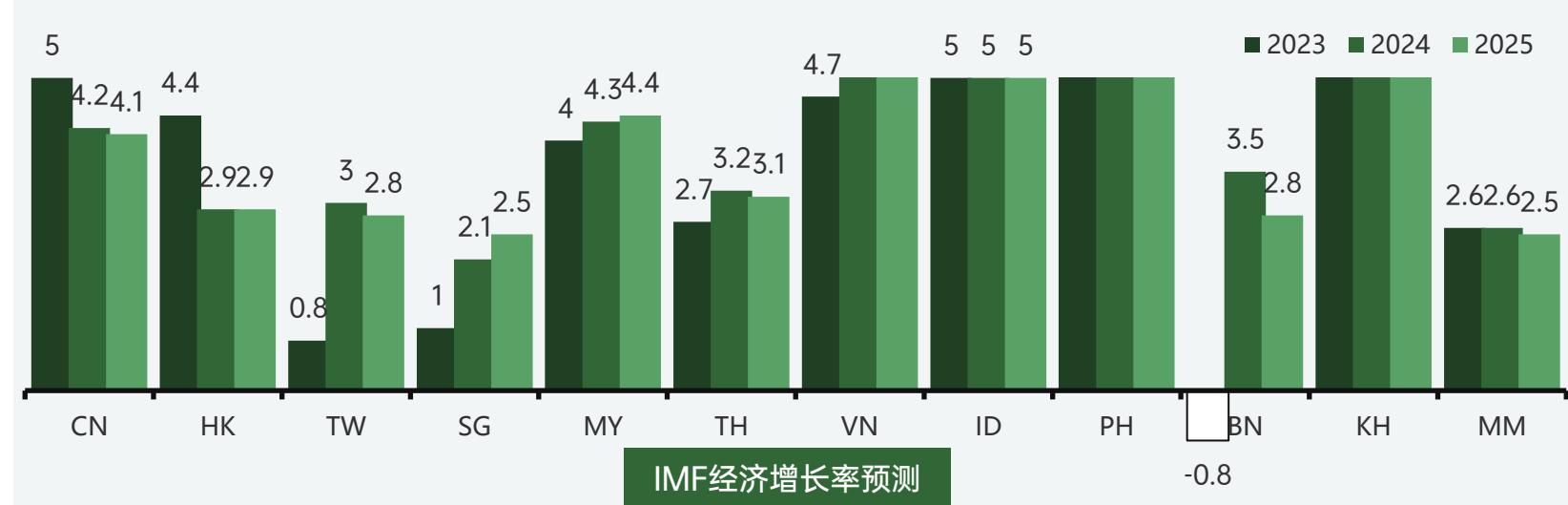
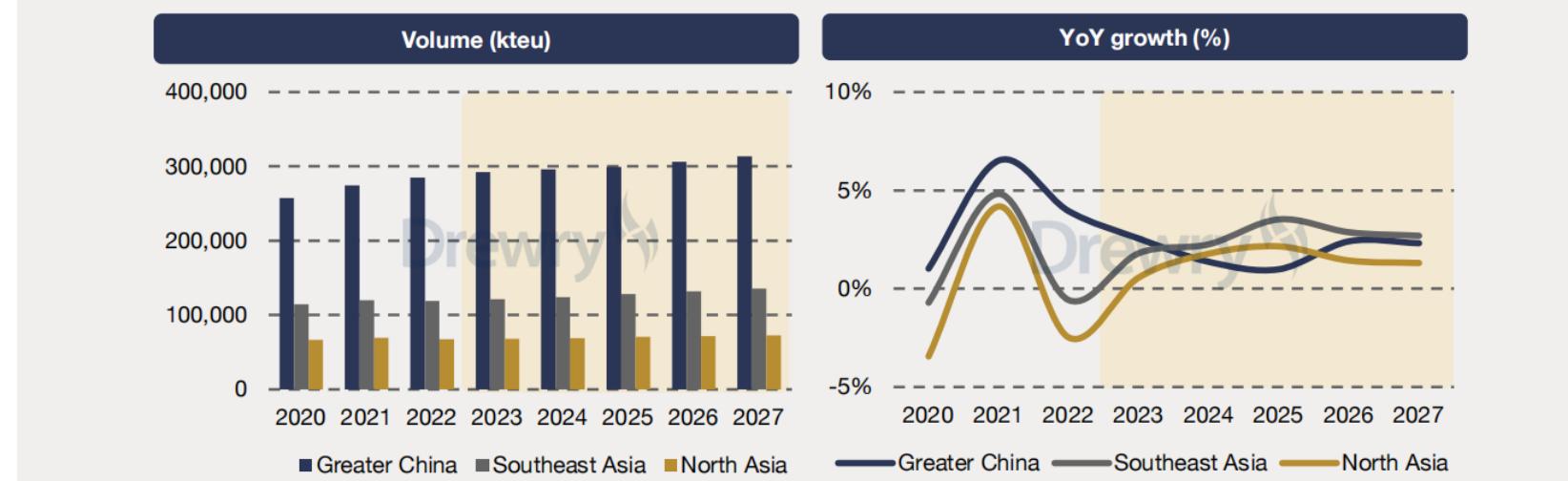


Figure 2.8 Regional container forecast: Asia





	NCS	CEM	KTP	KTH	NCI	HBT	HKH
POL	Inchon Qingdao Ningbo Fuqing Hong Kong Yantian	Qingdao Shanghai Ningbo Taipei Yantian	Dalian Tianjin Qingdao Hong Kong Shekou Kaohsiung	Hakata Busan Kwangyang Inchon Qingdao Taipei Kaohsiung	Tianjin Dalian Qingdao Gunsan Ningbo Nansha	Lianyungang Qingdao	Dalian Tianjin Qingdao Gunsan Ningbo
POD	Pasir Gudang Port Kelang N Port Kelang W Penang Kuantan	Singapore	Manila N Laem Chabang	Haiphong	Ho Chi Minh Tanjung Pelepas Jakarta Surabaya	Kaohsiung	Hong Kong
仓位	仓位维持	仓位维持	仓位维持	新增航线 From Jun, 2023	新增航线 From Apr, 2024	仓位维持	仓位减少
策略	Passir Gudang优先 Penang优先 Kuantan市场唯一	自有船仓位充足 Singapore中转 印尼/缅甸等	Manila N优先	VIP GREENPORT 港区靠近市区	越南/印尼优先	台湾当地货优先 日照及周边货源优先	全新V型船舶稳定 Hong Kong中转 马来/越南/菲律宾等

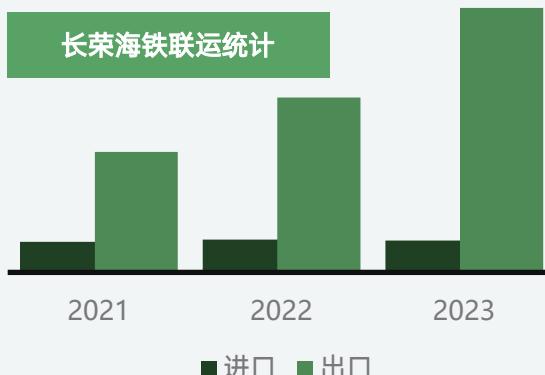


新腹地新通道

10%影响

- 初期青岛-日照支线模式不可替代，丝滑过渡至日照自给自足模式。
 - 鲁西南及苏北地区新货源新客人，定期出差拜访当地优质企业争取增量。
 - 威海、烟台等地支线网络开拓，争取烟威地区更低成本的支线至日照。
 - 曹县、临清、泰安、济南等地海铁联运新通道，争取直达日照班列。

长荣海铁联运统计



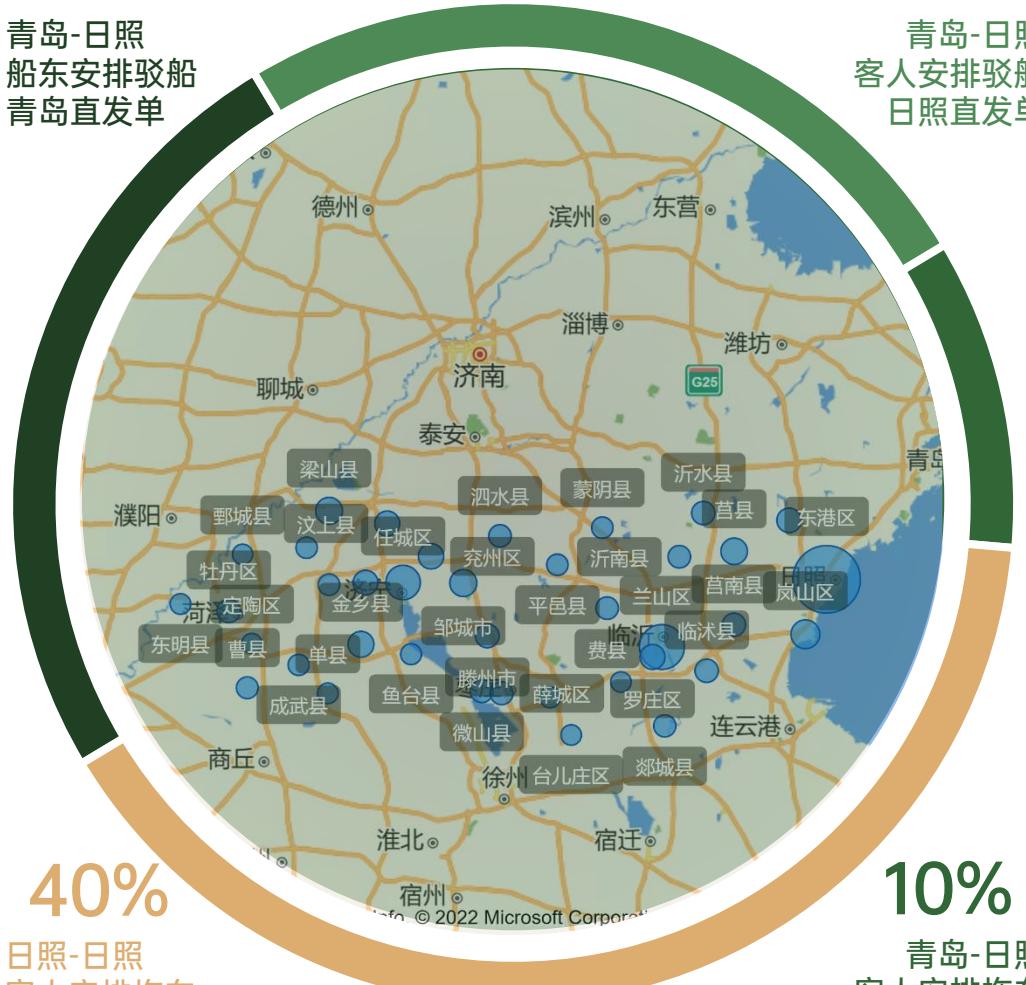
25%

青岛-日照
船东安排驳船
青岛直发单

25%

青岛-日照
客人安排驳船
日照直发单

40%
日照-日照
客人安排拖车
日照直发单

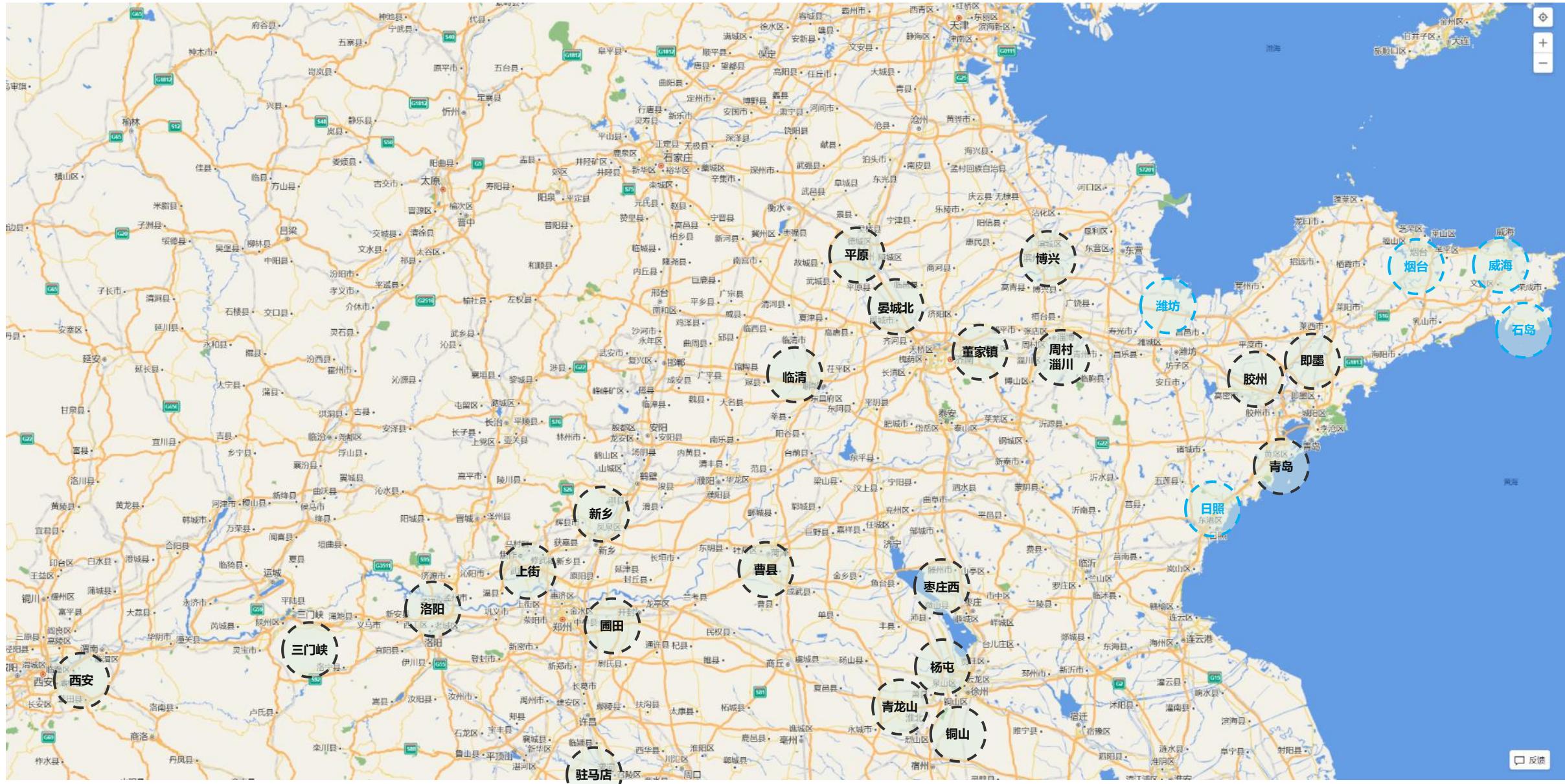


货载结构优化

HBT	TWKSG/TWTCG/TWTPE
HBT-CPH	PHCEB/PHDVA
HBT-TPH	PHKGY/PHDVA/PHGTC
HBT-NSA	PHBTG/PHMJJ/PHZUB
HBT-CPM	MYKOK/MYBUV/BNMRI
HBT-JPI	IDDKT/IDSRG/IDSUB
HBT-NSC	VNDNG/VNHCM
HBT-TPA*	AEJBA/SADMN/IQQUS
HBT-WSA*	MXMZD/COBVT/PECAL

011 | 多式联运

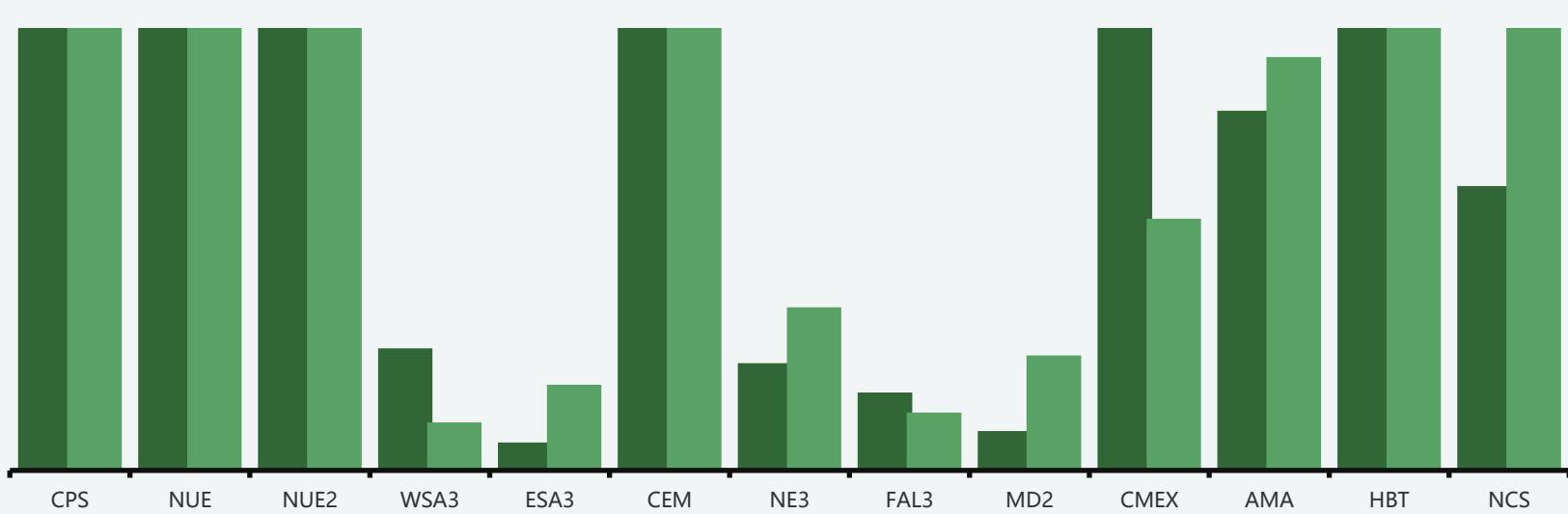
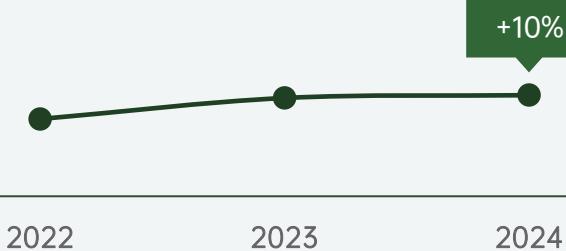
MULTIMODAL TRANSPORT





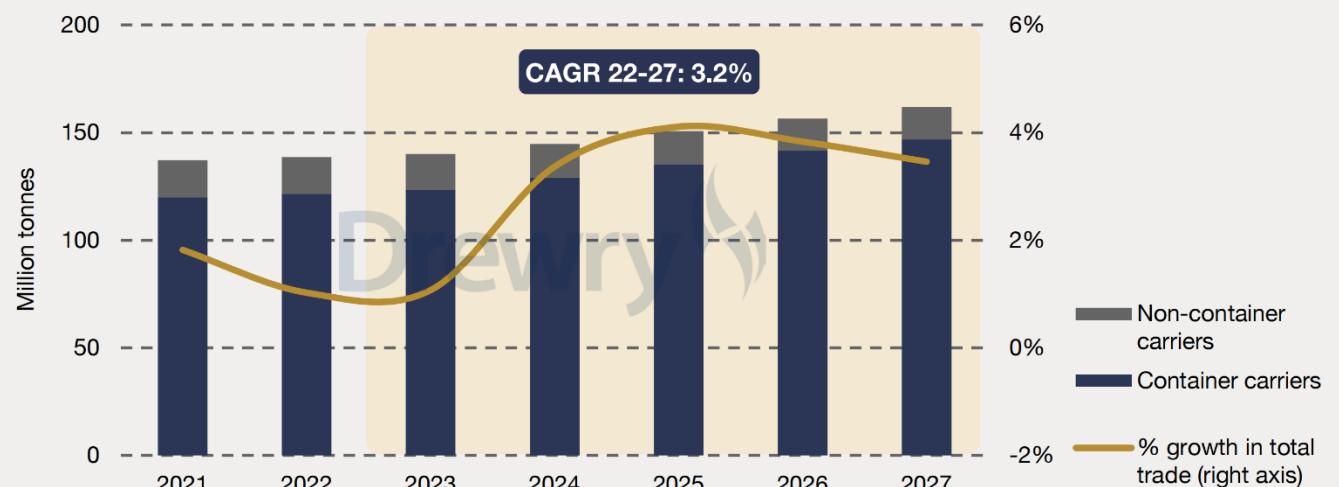
冻柜市场预估

美洲维持，欧地增加，近东减少及近洋增加。加强季节性货载揽收。重点关注美洲智能货柜。



Data	Basic Package \$50	Plus Package \$100
Temperature Set Point	✓	✓
Actual Supply Temperature	✓	✓
Actual Return Temperature	✓	✓
Power Status(On/Off)	✓	✓
Cargo Movement	✓	✓
Relative Humidity*	✗	✓
Report and Download	✗	✓
CO2 Set Point %**	✗	✓
CO2 Actual Value %**	✗	✓
O2 Set Point %**	✗	✓
O2 Actual Value %**	✗	✓
USDA Probes Data	✗	✓

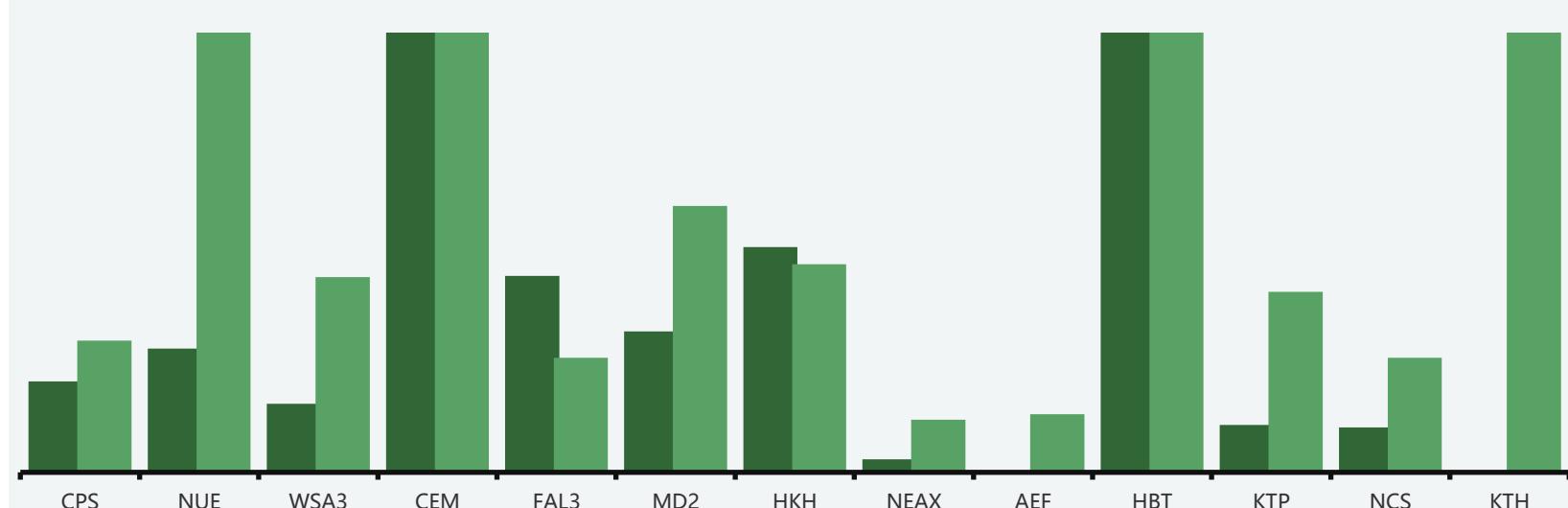
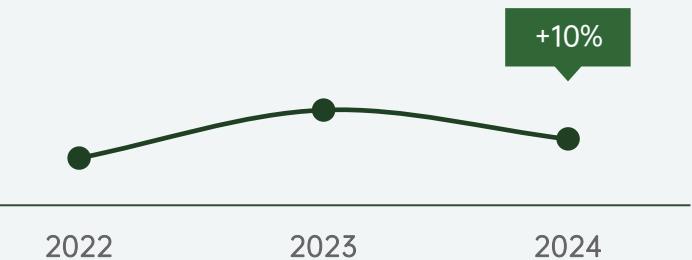
Figure 2.1 Worldwide seaborne reefer cargo modal split forecast





特殊柜市场预估

目标车辆类、玻璃类及机械类产品。关注自有航线或合营航线自有船。重点关注亚洲新增航线。



20' Flat Rack Container with Collapsible Ends

Cubic Capacity	-m³
Exterior	Length 6.058m Width 2.438m Height 2.591m



40' Flat Rack Container with Collapsible Ends

Cubic Capacity	-m³
Exterior	Length 12.192m Width 2.438m Height 2.591m



40' Flat Rack Hi-Cube Container Container with Collapsible Ends

Cubic Capacity	-m³
Exterior	Length 12.192m Width 2.438m Height 2.896m



20' Full Height Open Top Container

Cubic Capacity	32.5m³
Exterior	Length 6.058m Width 2.438m Height 2.591m



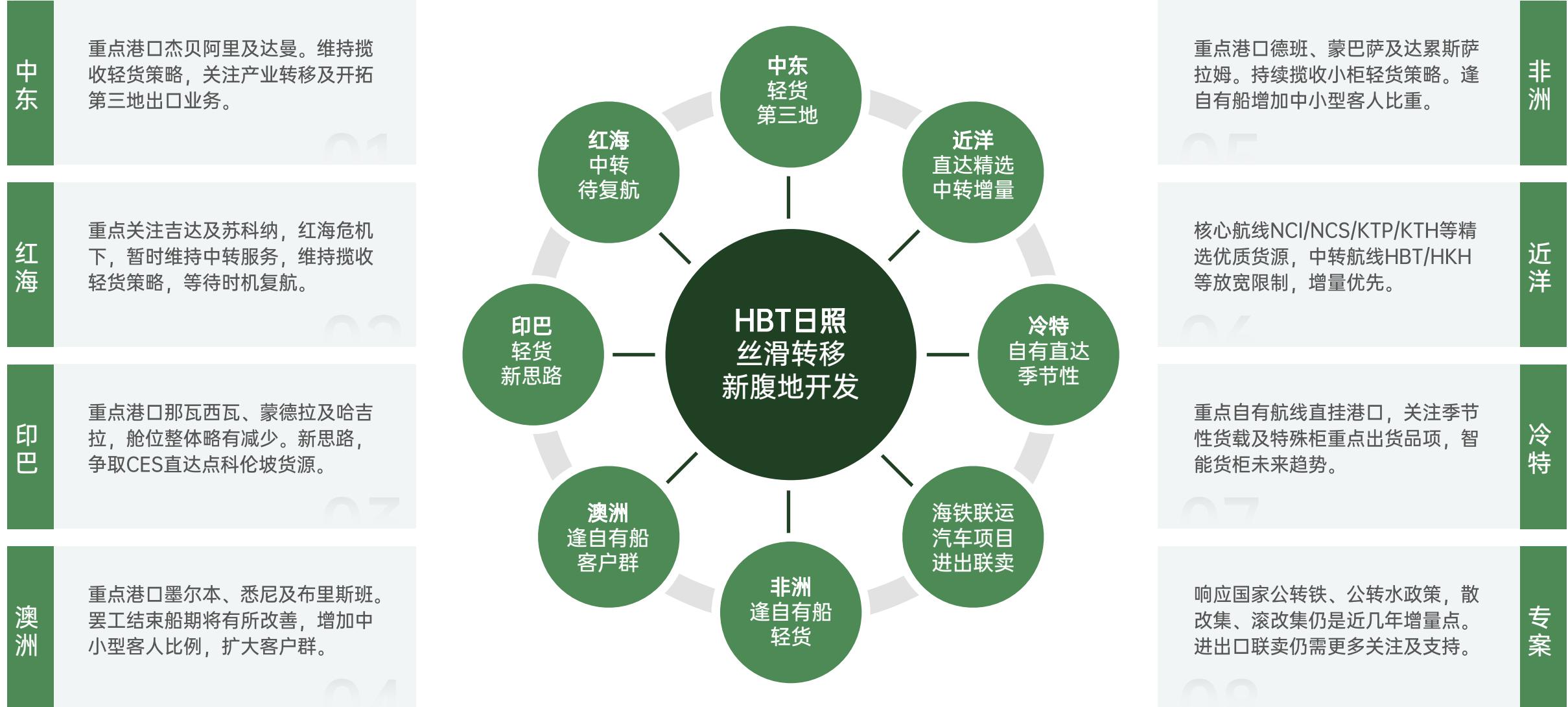
40' Full Height Open Top Container

Cubic Capacity	65.9m³
Exterior	Length 12.192m Width 2.438m Height 2.591m



40' Hi-Cube Open Top Container

Cubic Capacity	75.1m³
Exterior	Length 12.192m Width 2.438m Height 2.896m



015 | 销售团队

SALES TEAM



6896

Russ Li
非美加冷特
主做HBT/HKH
汽车专案小组组长

6895

Davy Song
近洋普柜
主做NCS/NCI/NSI/
CEM(近洋)/CIX2(近洋)

6891

Castiel Chen
近洋普柜+美加冷特
主做CV1/CV2/NCT/
KTP/KTH

6863

Flion Zhan
中东普柜
主做AMA/CMEX/TPA
第三地业务AGI

6892

Dennis Liu
印巴澳洲普柜
主做CIX2/CIX3/FME/
FME2/PMX/NEAX

6894

Philip Wang
红海东非南非普柜
主做FRS/RGI/FAX/ASA
AEF/ASEA



FULL STEAM AHEAD

相关资料来源：



INTERNATIONAL MONETARY FUND

