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Container Freight Rates: Container Capacity: March 2021 - 2023
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Container Capacity Insight

Global

EUROPE

ASIA

AMERICA

Capacity

Revenue

Revenue

Year date

2021

2022

2023

Revenue

2021

2022

2023

2021

2022

2023

2021

2022

2023

2021

2022

2023

2021

2022

2023

Week 1 | 2024

East West major trades - headwinds

In March, cancelled sailings on the Transpacific route are expected to decrease from 20 to 26 TON on the USOC and from 20% to 19 TON on the USLCC, on average 18 to 19% TON.

North Europe and western basin 3 to 11 from the West, indicating an overall loss of 20% TON. Container sailings on Asia North Europe are expected to increase from 10 to 13 TON, while on the Asia-West route from 9 to 13 TON.

Effective capacity on the Asia-West, European West will contract to 2% during the same period, while it will remain steady on the Asia-Mediterranean.

Monthly Number of Cancelled Sailings Evolution, East West Major Trades

Month	2021	2022	2023
Jan	5	25	28
Feb	10	22	25
Mar	15	18	22
Apr	18	15	18
May	22	12	15
Jun	18	10	12
Jul	15	10	12
Aug	12	15	15
Sep	10	18	18
Oct	12	15	15
Nov	15	12	12
Dec	18	10	10

Source: Drewry, Drewry Ocean Connect



Comprehensive weekly analysis of cancelled sailings, effective capacity and key operational metrics across the main E-W trades lanes



Annual subscription: \$2,100

Weekly analysis of port congestion, transit times and cancelled vs scheduled sailings, based on schedules published by the world's major ocean container carriers and alliances.

With carriers continuing to carefully adjust their schedules to meet demand, access to a regularly updated picture of container capacity and service availability is more important than ever.

As well as AIS data, we closely analyse service and schedule data feeds to understand current container capacity and market development - by alliance across the main trades.

To provide a historical context year-on-year comparisons are included in the weekly analysis.

Weekly PDF Insights, Annexes in Excel and access to interactive online service

1 Analysis across the major trades

Within each weekly Container Capacity Insight report, we analyse major East-West service schedules to provide a **“5-week”** forward picture of anticipated market development for the following main trades (headhaul):

- Transpacific Eastbound, Asia-North Europe & Mediterranean, South Asia-North Europe & Mediterranean, Transatlantic Westbound

Infographic/global map of the container market forecast (for next month) including capacity and spot rate fluctuations, as well as cancelled vs scheduled sailings).

2 Regional port congestion and transit time assessment

- Assessment and trend analysis
- Port congestion assessment for 7 regions ('Z' Scores for high and medium volume ports, based on the number of vessels waiting for a berthing window and Port congestion comparison between neighbouring ports (powered by Drewry AIS analysis)

3 Cancelled sailings weekly forward outlook

Weekly analysis for each of the above four main trade lanes:

- Transpacific Eastbound
- Asia-North Europe & Mediterranean
- South Asia-North Europe & Mediterranean
- Transatlantic Westbound

4 Year-on-year analysis

5 CO2 emissions, Utilisation and Dwell time

FAST FACTS:

Port congestion and trend analysis

Cancelled vs scheduled sailings

Analysis by trade route and alliance

Carriers CO2 emissions, Utilisation and Dwell time

Weekly .pdf updates (52 per annum)

All data, tables and charts also provided in Excel

Each weekly report accompanied by MS Excel data sheets

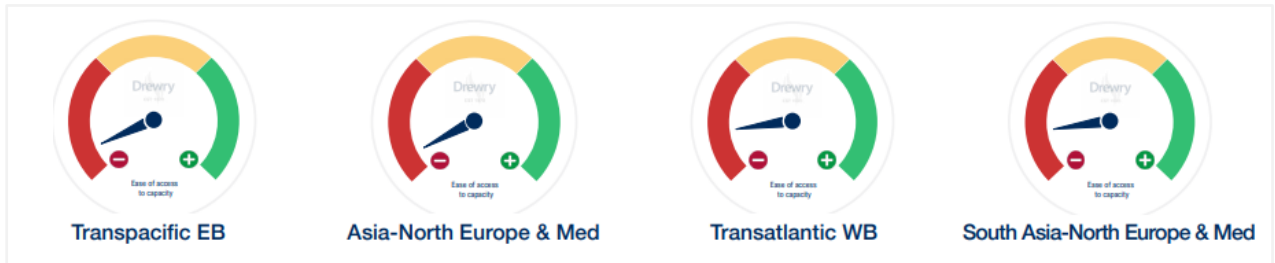
1. List of the cancelled vessels, including name of the ships, capacity, operator and routing
2. Weekly cancelled and scheduled sailings over 17 weeks, including 4 coming weeks
3. Year-on-year monthly cancelled sailings by trade lane and alliance



Section 1 CONTAINER MARKET FORECAST

'Ease of access to capacity' indicators headhaul (latest assessment for next 4 weeks) for the following trade lanes:

- Transpacific Eastbound, Asia-North Europe & Mediterranean, Transatlantic Westbound and South Asia-North Europe & Mediterranean



Section 2 CO2 EMISSIONS

- Average CO2 emissions by trade lane (E-W) vs best carrier
- Most eco-friendly carrier by trade lane (E-W)
- Updated quarterly

Section 3 CANCELLED SAILINGS

Weekly forward outlook by main trade lane:

- Transpacific Eastbound
- Asia-North Europe & Mediterranean
- Transatlantic Westbound
- South Asia-North Europe & Mediterranean

Includes spot rate development for each trade lane (sources: WCI or CFRI)

Section 4 YEAR-ON-YEAR ANALYSIS

- Evolution of cancelled sailings (headhaul) across each main trade lane
- Anticipated change in headhaul effective capacity for the next month, by trade lane and by carrier, as well as year-on-year comparison

Section 5 BEST CASE TRANSIT TIMES

Assessment of best case transit times with historical comparison

- Last port in Asia and first port in WCNA
- Last port in South East Asia and first port in North Europe
- Comparison of current year vs previous and vs long term trend

Section 6 PORT CONGESTION

Port congestion trend analysis

- Port Congestion 'Z' Scores for high and medium volume ports, based on the number of vessels waiting for a berthing window (AIS analysis)
- Port congestion comparison between neighbouring ports.

Section 7 DWELL TIME

- Trend analysis of import container dwell times at major ports

Section 8 UTILISATION

- Year-on-year analysis of utilisation trends across the major East-West trade lanes



Download an example weekly report

FEATURES

- ✓ Includes latest alliance schedule data feeds and AIS analysis of port congestion
- ✓ Global map visual of the container market forecast for the next month; change in spot rates, change in effective capacity, cancelled vs scheduled sailings
- ✓ A weekly 'forward analysis' of cancellations for each main trade; Transpacific Eastbound, Asia-North Europe and Mediterranean, Transatlantic Westbound and South Asia-North Europe & Mediterranean
- ✓ Regional port congestion and transit time analysis with year-on-year trend comparison
- ✓ Ease of access to capacity indicators (anticipating capacity on each of the 4 main trade routes over the next 4 weeks)
- ✓ List of the cancelled vessels, including name of the ships, capacity, operator and routing
- ✓ Weekly cancelled and scheduled sailings over 17 weeks, including 5 coming weeks
- ✓ Year-on-year monthly cancelled sailings by trade lane and alliance
- ✓ Import Dwell Time at selected ports and Utilisation indices spanning major East-West trade routes
- ✓ Comprehensive analysis on carriers CO2 emissions

Weekly PDF Insights, Annexes in Excel and access to new interactive online service via Drewry's Container Freight Portal



"Having a regularly updated picture of service availability is more important than ever."

Preferential terms available to subscribers of our Benchmarking Club and Container Freight Rate Insight service.

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