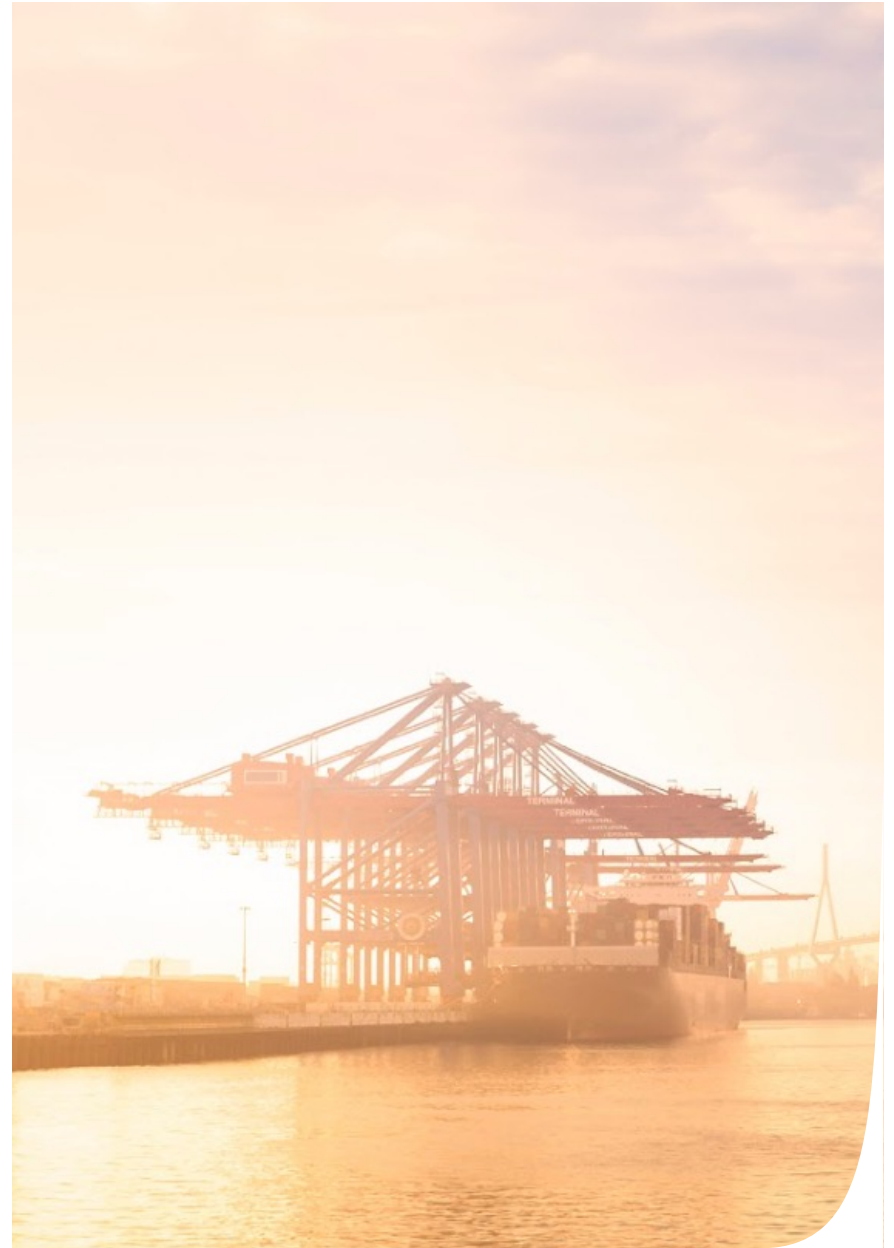


Schedule Reliability Scorecard

Q2 – 2024

Published 8 July, 2024



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INTRODUCTION

Welcome to the SRS

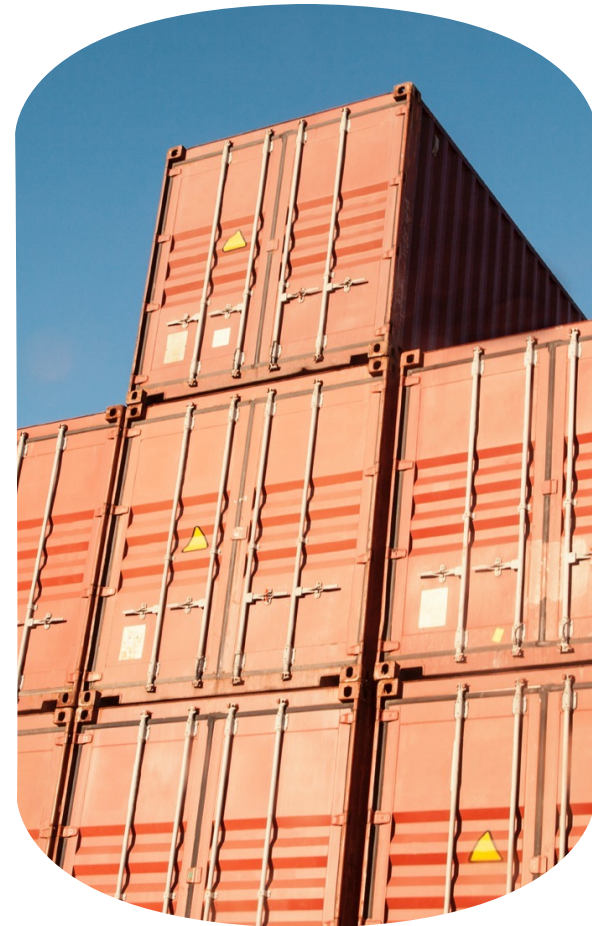
- Analysis of global schedule reliability; delays and on-time performance.
- Broken down by carrier, trade lane, region and port.
- Includes rankings and top insights.
- Published quarterly.
- Methodology and terminology in appendix.
- Sub-topics further explored on eeSea LinkedIn page.
- More granular data and insights available from eeSea.



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Reliability continues steep decline for most

INSIGHT #1

Global & Trade

Global reliability dropped back to pandemic bubble levels as feared.

- Total average schedule reliability dropped by more than 30% compared to previous quarter (from -3.2d in Q1, to -4.2d in Q2).
- All E/W trades were subject to negative factors like significant congestion, political instability, and fears over imminent strike actions; but the decline gained special momentum in Asia-Europe and East Coast North America.
- Newly established routes around the Cape of Good Hope may have increased instability into first ports of call like Tanger Med – leading to exceptional decline in the Far East-Mediterranean.
- Despite uncertainty of possible strike actions, West Coast North America is the only coastal region that saw actual improvement in average delays, from -4.0d in Q1 to -3.6d in Q2, largely due to positive US port performance.

INSIGHT #2

Carriers & Alliances

PIL & CMA CGM took 1st place in the carrier rankings.

- Maersk (-2.7d) fell just behind PIL (-2.6d) in operator rankings after a four-year winning streak and was also narrowly edged out by CMA CGM (-3.5d) in the VSA rankings.
- In another rare sight, non-alliance services dropped out of favour and were replaced by the OCEAN alliance for 1st place.
- Carriers like PIL and HL, that exhibited just a -0.1d and -0.3d decline since Q1, improved their rankings just by maintaining their service levels.
- With a lot of pitfalls in place, staying high in the rankings in 2024 has become about who declines the least.

INSIGHT #3

Ports & Regions

Top 10 ports saw Livorno back to 1st place.

- Livorno (-1.4d) returned to 1st place ranking after being uprooted last quarter by Guayaquil (-1.6d) which retreated to 3rd place.
- The Top 10 and Top 20 were dominated by European ports in Q2: Laem Chabang gained an additional 48hrs of delay and dropped from 20th to 25th – causing the Asia region to lose its lead.
- Much like Q1, the Top 50 ports are still most heavily distributed by coastal region in Northeast Asia (10), Southern Europe (8), and Northern Europe (7).
- Major transshipment hubs like Singapore and Tanger Med suffered from spikes in congestion, contributing to a fall in the rankings.

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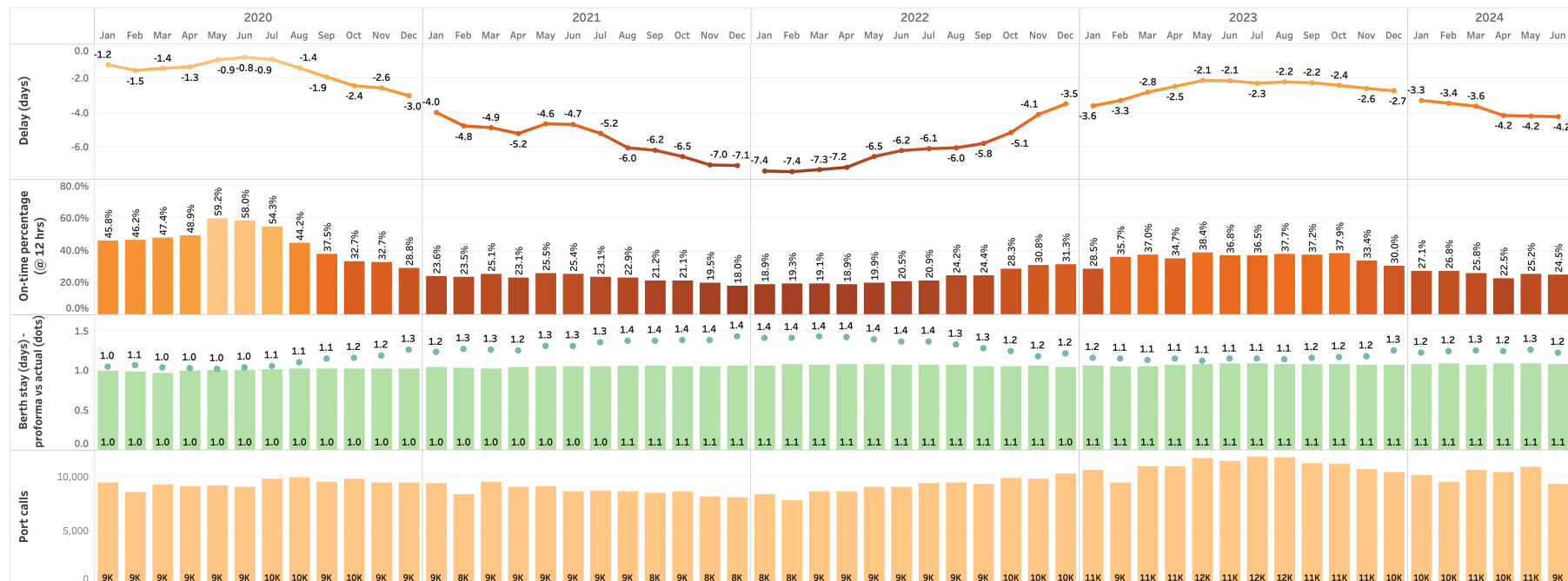
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GLOBAL SCORECARD

2024 Q2 continues decline, crosses pandemic-level threshold



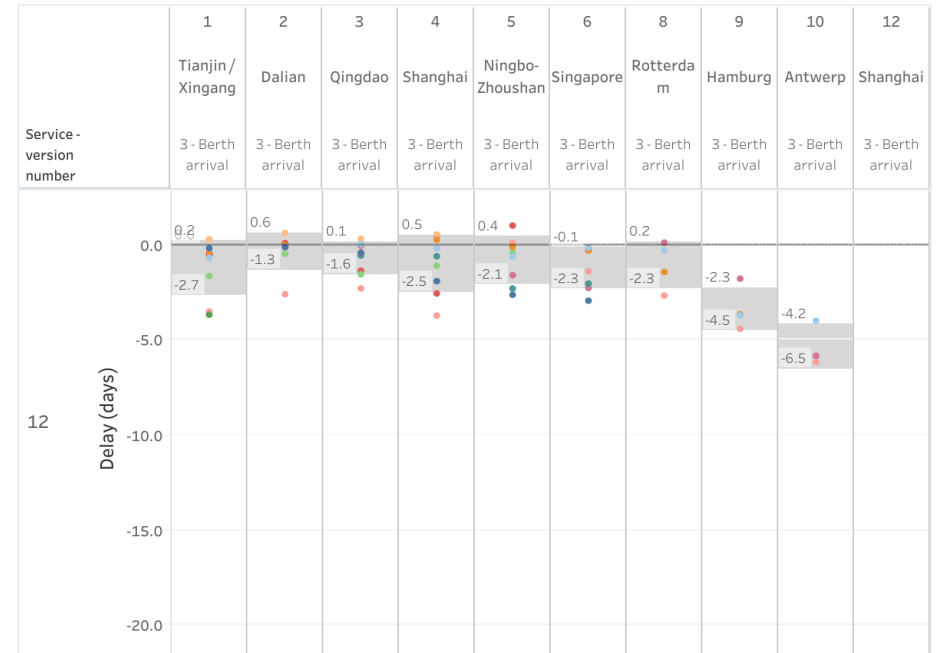
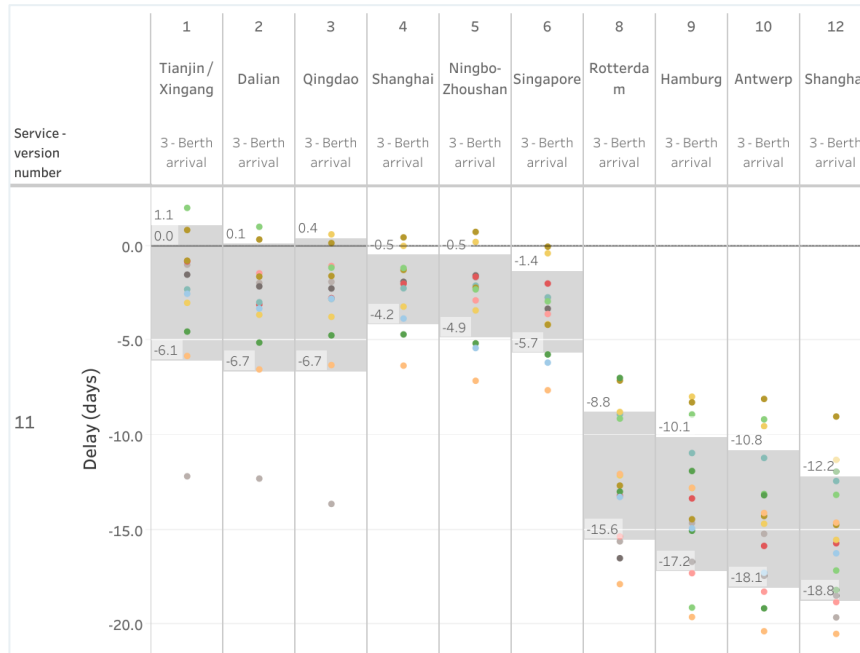
1. Global average for the period 2023 Q3 - 2024 Q2: -3.1 days, 30% on-time performance (OTP).
2. Q2 (-4.2 days, 25% OTP) continues deterioration over Q1 (-3.4 days, 27% OTP). There is no single 'bad trade' responsible for sinking averages as nearly all have suffered persistent decline since the beginning of 2024.
3. Poor reliability is still nowhere near the worst during Covid but now past the threshold of where we entered 2021 Q1 and left 2022 Q4.

Criteria

- All mainline E/W and N/S services, excluding feeders/intras.
- All ports on service rotation.
- Berth arrivals only.
- Delays = negative numbers.

GLOBAL SCORECARD

Small adjustments lead to big impacts



1. On an Asia-Europe OCEAN alliance service; every vessel on service version 11 was at least 7 days late into Rotterdam from the start of 2024.
2. At the start of Q2, the service took on an additional slot and increased its roundtrip from 91 to 98 days.
3. The v12 changes beginning in April had positive impact on reducing vessel delays; shortening the window of standard deviation for every port, reducing frequency and extremity of outliers, and closing the massive jump between Singapore and Rotterdam.

Criteria

- Dots represent port calls.
- Grey band represents a +1 / -1 standard deviation.
- The Alliance's PN4 service.
- Berth arrivals only.
- Delays = negative numbers.

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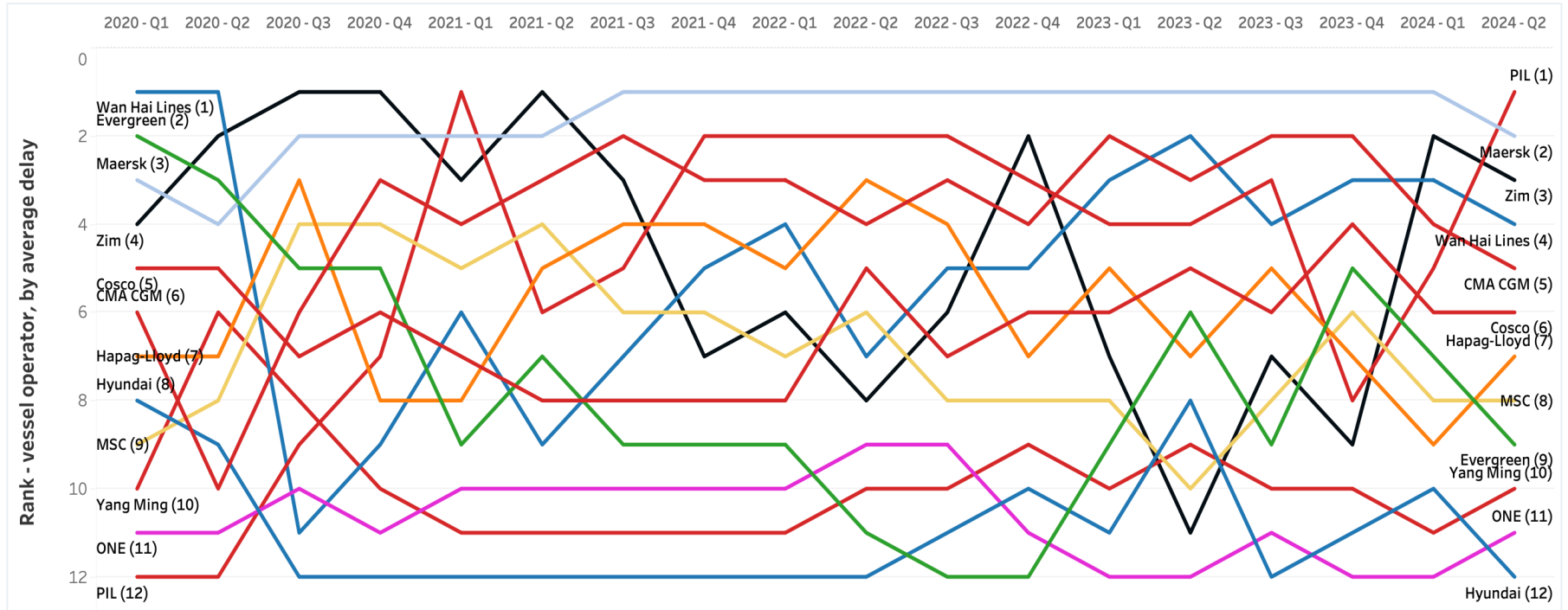
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CARRIERS

Pacific International Lines take first place

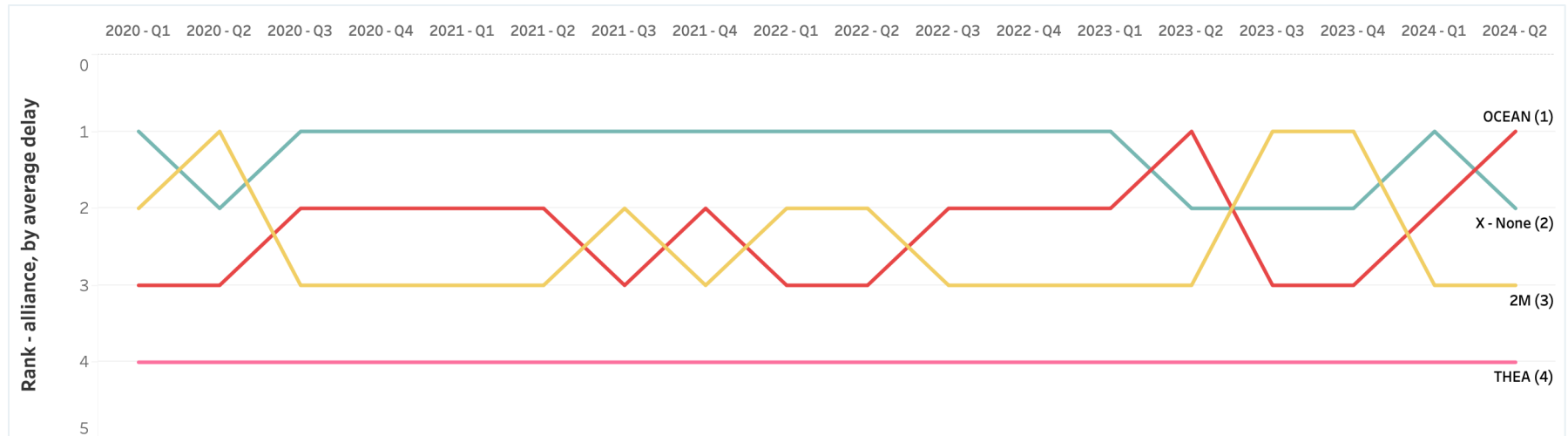


1. PIL jumped from 5th to 1st place in Q2 (-2.6 days, 27% OTP) but remains in 4th place for OTP rankings. It is the only carrier with delays that improved since Q1 (-2.8 days, 28% OTP).
2. Maersk just barely lost the lead by -0.1 days (-2.7 days, 31% OTP) for the first time since 2021 Q3.
3. Hapag-Lloyd edged up from 9th to 7th place and saw a relatively minor decline from Q1 (-3.6 days, 27% OTP) through Q2 (-3.7 days, 25% OTP).

Criteria

- 2020 Q1 – 2024 Q2
- Ranking based on average delay.
- All vessels operated by the carrier.
- All port calls, berth arrivals only.
- All mainline E/W and N/S services, excluding feeders/intras.
- Only top 12 carriers by size.

OCEAN alliance jumps ahead of the pack



1. OCEAN alliance took the lead in Q2 (-3.6 days, 25% OTP) despite a -0.5 day increase in delay against Q1 (-3.1 days, 27% OTP). This is just the second time that OCEAN alliance achieves 1st place in the past four years – a spot historically consistently dominated by non-alliance services up to 2023 Q2.
2. Non-alliance services drastically dropped in reliability by a full day from Q1 (-3.0 days, 29% OTP) to Q2 (-4.0 days, 26% OTP) falling to 2nd place.
3. 2M continued to decline by an additional -0.6 days from Q1 (-3.8 days, 20% OTP) to Q2 (-4.4 days, 18% OTP) but held on to its 3rd place ahead of THEA (-5.6 days, 16% OTP).

Criteria

- Ranking based on average delay.
- All vessels on all service operated within or outside an alliance.
- All port calls, berth arrivals only.
- Covers the EUR-NAM, FEA-EUR, FEA-NAM and Middle East trades.

CARRIERS

Ranking by VSA participation is more relevant for some

← VERSIONS OCEAN - PSW3 & AWE3 || CMA - CJX | COSCO - SEA2 & AWE5 | EMC - PE1 | OOCL - Asia - North America

Current Versions Partners Proforma Map Description News

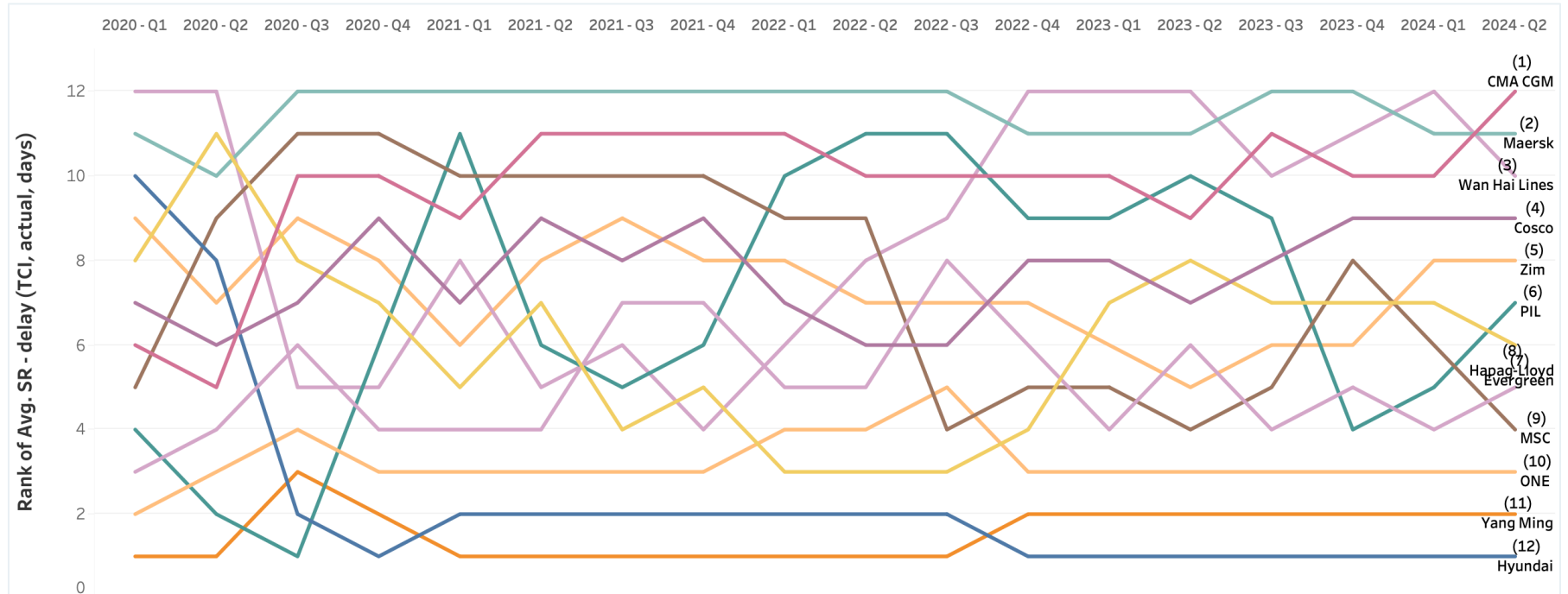
#12 ▾

	COMPANY	PARTNER ROLE	SERVICE CODE SERVICE NAME
	CMA CGM	VESSEL PROVIDER	CJX Columbus Jax
	Cosco Shipping Lines	ALLIANCE PARTNER	SEA2 & AWE5 SEA2 & AWE5
	Evergreen Line	ALLIANCE PARTNER	PE1 Pendulum Express 1
	Orient Overseas Container Line	ALLIANCE PARTNER	SEAP South East Asia Pendulum

- Vessel operator view is straightforward: a carrier controls the vessel that it operates.
- But carriers engage in complex alliances and VSA's: a customer buying space with Hapag-Lloyd may instead receive slots on a Yang Ming vessel.
- We've created a measure to properly reflect every participating carrier, not just the operator.
- This measure is especially relevant for cargo owners and logistics providers.

CARRIERS

CMA CGM takes the lead for VSA rankings



1. CMA CGM moved into 1st place (-3.5 days, 27% OTP) just ahead of Maersk (-3.6 days, 26% OTP) and WHL dropped to 3rd (-3.6 days, 24% OTP)
2. PIL showed the least overall decline in delay and moved up 2 slots to 6th place from Q1 (-4.2 days, 23% OTP) to Q2 (-4.3 days, 23% OTP) – not quite edging past ZIM (-4.2 days, 23% OTP)
3. ONE, YML, and Hyundai consistently remain at the bottom of the VSA rankings, echoed in the operator rankings.

Criteria

- Ranking based on average delay.
- All vessels on which the carrier participates, either by operating them or through an alliance or VSA.
- All port calls, berth arrivals only.
- All mainline E/W and N/S services, excluding feeders/intras.
- Only top 12 carriers by size

Under the hood...

	VSA - company code (group)	2020					2021					2022					2023					2024				Grand Total
		Q1	Q2	Q3	Q4	Total	Q1	Q2	Q3	Q4	Total	Q1	Q2	Q3	Q4	Total	Q1	Q2	Q3	Q4	Total	Q1	Q2	Total		
Delay - days	CMA CGM	-1.3	-1.0	-1.4	-2.3	-1.5	-4.1	-4.4	-5.6	-6.5	-5.1	-7.2	-6.7	-5.8	-4.1	-5.9	-2.8	-1.7	-1.8	-2.2	-2.1	-3.1	-3.5	-3.3	-3.5	
	Cosco	-1.3	-1.0	-1.5	-2.5	-1.6	-4.1	-4.9	-6.5	-7.3	-5.6	-8.0	-7.3	-6.7	-4.6	-6.6	-3.3	-1.9	-2.1	-2.5	-2.4	-3.2	-3.7	-3.5	-3.8	
	Evergreen	-1.3	-0.8	-1.5	-2.6	-1.5	-4.6	-5.3	-7.8	-9.2	-6.6	-9.7	-8.3	-7.7	-5.3	-7.7	-3.3	-1.9	-2.4	-2.7	-2.6	-3.6	-4.3	-3.9	-4.3	
	Hapag-Lloyd	-1.5	-1.1	-1.5	-3.2	-1.9	-5.9	-5.7	-6.8	-8.0	-6.6	-9.0	-7.4	-6.5	-5.0	-6.9	-4.2	-2.8	-2.6	-3.2	-3.2	-4.2	-4.5	-4.4	-4.5	
	Hyundai	-1.1	-1.0	-2.1	-5.0	-2.4	-9.3	-8.9	-9.8	-11.2	-9.8	-11.6	-10.5	-8.7	-6.9	-9.4	-5.7	-3.7	-4.1	-4.4	-4.4	-5.2	-5.9	-5.6	-6.2	
	Maersk	-1.0	-0.8	-1.2	-2.1	-1.3	-3.3	-3.9	-4.7	-5.4	-4.3	-5.3	-4.9	-5.1	-3.8	-4.8	-2.7	-1.6	-1.6	-1.7	-1.9	-3.0	-3.6	-3.3	-3.8	
	MSC	-1.4	-0.9	-1.2	-2.3	-1.5	-3.7	-4.5	-5.6	-7.2	-5.2	-7.8	-7.1	-7.7	-5.0	-6.9	-4.0	-2.9	-2.4	-2.6	-2.5	-3.7	-4.7	-4.2	-4.0	
	ONE	-1.7	-1.2	-2.0	-4.2	-2.3	-7.3	-7.3	-8.4	-9.7	-8.1	-9.6	-8.2	-7.1	-5.4	-7.5	-4.4	-3.0	-3.1	-3.6	-3.5	-4.4	-5.1	-4.8	-5.2	
	PIL	-1.4	-1.3	-2.1	-2.8	-1.9	-3.6	-5.5	-7.5	-8.5	-6.1	-7.5	-6.5	-5.7	-4.2	-5.8	-3.0	-1.6	-2.1	-3.3	-2.5	-4.2	-4.3	-4.2	-3.8	
	Wan Hai Lin..	-0.8	-0.6	-1.8	-2.9	-1.5	-4.1	-5.6	-7.2	-9.6	-6.5	-8.7	-7.2	-6.2	-3.8	-6.3	-2.6	-1.5	-1.9	-2.1	-2.0	-3.0	-3.6	-3.3	-4.0	
Yang Ming	-2.2	-1.3	-2.1	-5.0	-2.7	-9.5	-9.4	-10.5	-12.5	-10.3	-13.2	-10.5	-8.9	-6.9	-9.7	-4.9	-3.1	-3.7	-4.4	-4.0	-5.2	-5.5	-5.3	-6.3		
Zim	-1.2	-1.0	-1.5	-2.5	-1.6	-4.4	-5.2	-6.1	-7.4	-5.7	-7.9	-7.3	-6.6	-4.9	-6.6	-3.7	-2.8	-2.4	-2.8	-2.9	-3.3	-4.2	-3.8	-4.1		
Rank of Avg. SR - delay (TCI, actual, days) along Table (Down)	CMA CGM	7	8	3	3	3	4	2	2	2	2	2	3	3	3	3	3	4	2	3	3	3	1	3	2	
	Cosco	6	7	6	4	7	6	4	5	4	4	6	7	7	5	5	5	6	5	4	4	4	4	4	3	
	Evergreen	5	2	5	6	4	8	6	9	8	9	10	10	10	9	10	6	5	6	6	6	6	7	6	8	
	Hapag-Lloyd	10	9	7	9	8	9	9	6	6	8	8	8	5	7	8	9	7	9	8	9	9	8	9	9	
	Hyundai	3	5	11	12	11	11	11	11	11	11	11	11	11	12	11	12	12	12	12	12	12	12	12	11	
	Maersk	2	3	1	1	1	1	1	1	1	1	1	1	1	2	1	2	2	1	1	1	2	2	2	1	
	MSC	8	4	2	2	2	3	3	3	3	3	4	4	9	8	7	8	9	8	5	8	7	9	8	5	
	ONE	11	10	9	10	10	10	10	10	10	10	9	9	8	10	9	10	10	10	10	10	10	10	10	10	
	PIL	9	11	12	7	9	2	7	8	7	6	3	2	2	4	2	4	3	4	9	5	8	6	7	4	
	Wan Hai Lin..	1	1	8	8	5	5	8	7	9	7	7	5	4	1	4	1	1	3	2	2	1	3	1	6	
Yang Ming	12	12	10	11	12	12	12	12	12	12	12	12	12	11	12	11	11	11	11	11	11	11	11	12		
Zim	4	6	4	5	6	7	5	4	5	5	5	6	6	6	6	7	8	7	7	7	5	5	5	7		
Delay - on-time percentage	CMA CGM	49.6%	57.8%	47.1%	33.4%	46.9%	25.0%	24.8%	22.6%	20.2%	23.3%	18.4%	17.3%	22.9%	29.9%	22.4%	37.5%	43.0%	41.8%	37.4%	40.0%	27.7%	26.9%	27.3%	33.2%	
	Cosco	51.9%	58.4%	45.3%	32.2%	46.8%	23.0%	19.0%	16.3%	13.9%	18.3%	12.9%	12.5%	16.9%	24.1%	16.8%	31.7%	38.5%	36.1%	34.8%	35.4%	27.0%	24.6%	25.8%	30.0%	
	Evergreen	50.4%	62.3%	43.7%	28.3%	46.2%	17.3%	13.8%	7.3%	6.3%	11.6%	7.0%	9.6%	12.4%	19.7%	12.4%	30.9%	36.9%	32.2%	30.3%	32.6%	23.3%	21.4%	22.3%	26.5%	
	Hapag-Lloyd	45.2%	54.4%	46.5%	31.0%	44.0%	21.7%	22.9%	19.0%	15.2%	19.9%	14.6%	15.9%	18.2%	24.9%	18.5%	28.9%	32.4%	32.7%	28.3%	30.6%	23.9%	20.9%	22.4%	28.3%	
	Hyundai	50.6%	52.2%	33.3%	16.8%	37.7%	10.1%	13.5%	8.0%	5.5%	9.4%	10.3%	9.5%	12.6%	19.1%	13.0%	23.9%	21.2%	17.0%	19.8%	20.3%	18.1%	13.7%	15.8%	20.2%	
	Maersk	52.3%	60.0%	50.9%	36.0%	49.9%	29.8%	28.9%	27.8%	29.0%	28.9%	29.5%	28.9%	29.5%	37.4%	31.3%	41.7%	46.3%	45.9%	46.0%	45.0%	30.3%	26.3%	28.3%	38.2%	
	MSC	44.1%	54.5%	45.5%	30.8%	43.6%	23.8%	21.4%	18.4%	16.1%	20.0%	14.4%	15.7%	14.5%	25.4%	17.8%	24.5%	28.3%	35.0%	31.9%	30.1%	23.1%	20.2%	21.6%	27.8%	
	ONE	41.8%	50.4%	37.1%	22.3%	37.6%	14.9%	14.8%	11.0%	9.0%	12.6%	13.5%	15.4%	16.3%	22.3%	17.1%	26.7%	26.3%	25.8%	24.9%	25.9%	23.7%	19.5%	21.5%	23.5%	
	PIL	49.2%	54.7%	37.0%	30.6%	43.2%	26.8%	15.5%	10.5%	8.8%	16.1%	13.4%	14.6%	19.2%	22.7%	17.9%	35.1%	39.7%	32.3%	28.4%	33.9%	23.0%	22.5%	22.8%	28.5%	
	Wan Hai Lin..	57.9%	60.0%	36.1%	32.8%	46.6%	23.6%	16.1%	10.5%	5.8%	14.3%	9.4%	13.3%	11.4%	24.5%	15.1%	31.9%	38.3%	35.9%	36.0%	35.6%	25.0%	23.6%	24.3%	27.1%	
Yang Ming	35.4%	49.3%	35.0%	18.6%	34.1%	9.9%	9.4%	6.1%	5.0%	7.8%	7.6%	7.8%	9.4%	16.8%	10.7%	27.2%	26.2%	21.3%	19.7%	23.5%	20.4%	15.1%	17.7%	19.5%		
Zim	48.3%	58.3%	45.4%	29.6%	44.9%	22.1%	23.7%	15.9%	10.7%	18.4%	14.2%	13.9%	18.2%	27.7%	18.9%	29.6%	30.6%	33.2%	32.1%	31.4%	26.4%	23.0%	24.7%	28.0%		
Actual vessel events	CMA CGM	10.2K	10.3K	11.1K	10.5K	42.1K	9.6K	9.4K	8.8K	8.4K	36.1K	8.2K	9.0K	9.2K	9.7K	36.1K	10.2K	11.0K	11.3K	10.6K	43.1K	9.5K	9.8K	19.2K	176.7K	
	Cosco	9.2K	9.0K	9.9K	9.3K	37.4K	8.4K	8.1K	7.4K	7.0K	31.0K	6.9K	7.5K	7.7K	8.2K	30.4K	8.6K	9.4K	9.8K	9.2K	37.0K	8.5K	8.9K	17.4K	153.3K	
	Evergreen	5.7K	5.8K	6.2K	5.7K	23.4K	5.4K	5.2K	4.6K	4.3K	19.6K	4.3K	4.7K	4.7K	5.1K	18.9K	5.5K	6.0K	6.0K	5.7K	23.2K	5.4K	5.5K	10.9K	96.0K	
	Hapag-Lloyd	9.3K	9.2K	10.1K	10.0K	38.6K	9.1K	8.9K	8.3K	7.7K	34.1K	7.6K	8.0K	7.8K	8.2K	31.5K	8.2K	8.7K	9.4K	8.7K	35.0K	7.8K	8.2K	16.0K	155.1K	
	Hyundai	3.5K	3.9K	4.1K	4.0K	15.5K	3.8K	3.6K	3.3K	3.2K	14.0K	3.2K	3.1K	3.1K	3.4K	12.8K	3.4K	3.7K	4.0K	3.6K	14.7K	3.3K	3.6K	6.9K	63.8K	
	Maersk	9.9K	9.4K	9.8K	9.4K	38.6K	8.7K	8.6K	8.3K	8.2K	33.7K	7.9K	8.0K	8.2K	8.1K	32.2K	8.2K	8.6K	9.0K	8.1K	33.9K	7.2K	7.4K	14.7K	153.0K	
	MSC	7.9K	7.9K	8.4K	8.3K	32.6K	7.6K	7.3K	7.1K	6.9K	29.0K	6.5K	6.5K	6.7K	7.5K	27.1K	8.1K	9.2K	9.2K	8.4K	34.8K	7.7K	7.8K	15.5K	139.0K	
	ONE	6.6K	6.4K	7.0K	6.9K	26.8K	6.6K	6.4K	5.9K	5.5K	24.5K	5.6K	5.9K	6.0K	6.6K	24.1K	6.6K	7.2K	7.5K	7.1K	28.4K	6.8K	7.2K	14.0K	117.8K	
	PIL	2.4K	2.3K	2.4K	2.1K	9.2K	1.8K	1.6K	1.4K	1.5K	6.3K	1.5K	1.8K	2.0K	2.2K	7.6K	2.2K	2.4K	2.5K	2.2K	9.3K	2.2K	2.2K	4.4K	36.8K	
	Wan Hai Lin..	1.1K	1.1K	1.1K	1.1K	4.3K	1.3K	1.4K	1.2K	1.1K	5.0K	1.2K	1.3K	1.5K	1.6K	5.5K	1.5K	1.7K	1.7K	1.6K	6.5K	1.5K	1.5K	3.0K	24.4K	
Yang Ming	3.9K	4.0K	4.5K	4.5K	16.8K	4.3K	4.0K	3.6K	3.2K	15.2K	3.2K	3.4K	3.4K	3.8K	13.9K	3.7K	4.1K	4.4K	4.0K	16.2K	3.7K	4.0K	7.6K	69.7K		
Zim	2.9K	2.9K	3.3K	3.3K	12.5K	3.4K	3.3K	3.1K	3.0K	12.8K	2.9K	3.0K	3.3K	3.5K	12.7K	3.5K	3.8K	3.9K	3.5K	14.6K	3.7K	3.7K	7.4K	60.0K		
Delay - days	Total	-1.4	-1.0	-1.4	-2.7	-1.6	-4.6	-5.0	-6.0	-7.0	-5.6	-7.5	-6.7	-6.1	-4.3	-6.1	-3.2	-2.2	-2.2	-2.5	-2.5	-3.4	-4.0	-3.7	-3.8	
Rank of Avg...	Total	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	
Delay - on-ti...	Total	48.0%	56.9%	45.9%	31.5%	45.4%	24.0%	23.5%	21.1%	18.9%	22.0%	18.6%	19.2%	22.3%	29.7%	22.7%	34.0%	37.4%	37.8%	34.8%	36.1%	27.0%	24.0%	25.5%	31.3%	
Actual vesse...	Total	26.0K	26.1K	27.9K	27.3K	107.3K	25.9K	25.3K	24.3K	23.3K	98.8K	23.0K	24.7K	25.8K	27.6K	101.2K	28.6K	31.4K	32.3K	29.8K	122.0K	27.6K	28.6K	56.2K	485.4K	

- Unlike WHL, which took the lead in rankings by delay in Q1 but fell behind for OTP in 4th place, CMA CGM maintains 1st place in all categories in Q2: delays, OTP, and total actual vessel events.
- While CMA CGM earned 1st place in every category, it also added another -0.4d delay since Q1, just managing to stay ahead of Cosco (-3.7 days, 25% OTP) which also added -0.5 days delay.
- Despite consistently low rankings, HL was one of just two carriers that showed minimal increase in delay from Q1 (-4.2 days, 24% OTP) to Q2 (-4.5 days, 21% OTP) and managed to bump MSC (-4.7 days, 20% OTP) out of 8th place.

CONTENTS

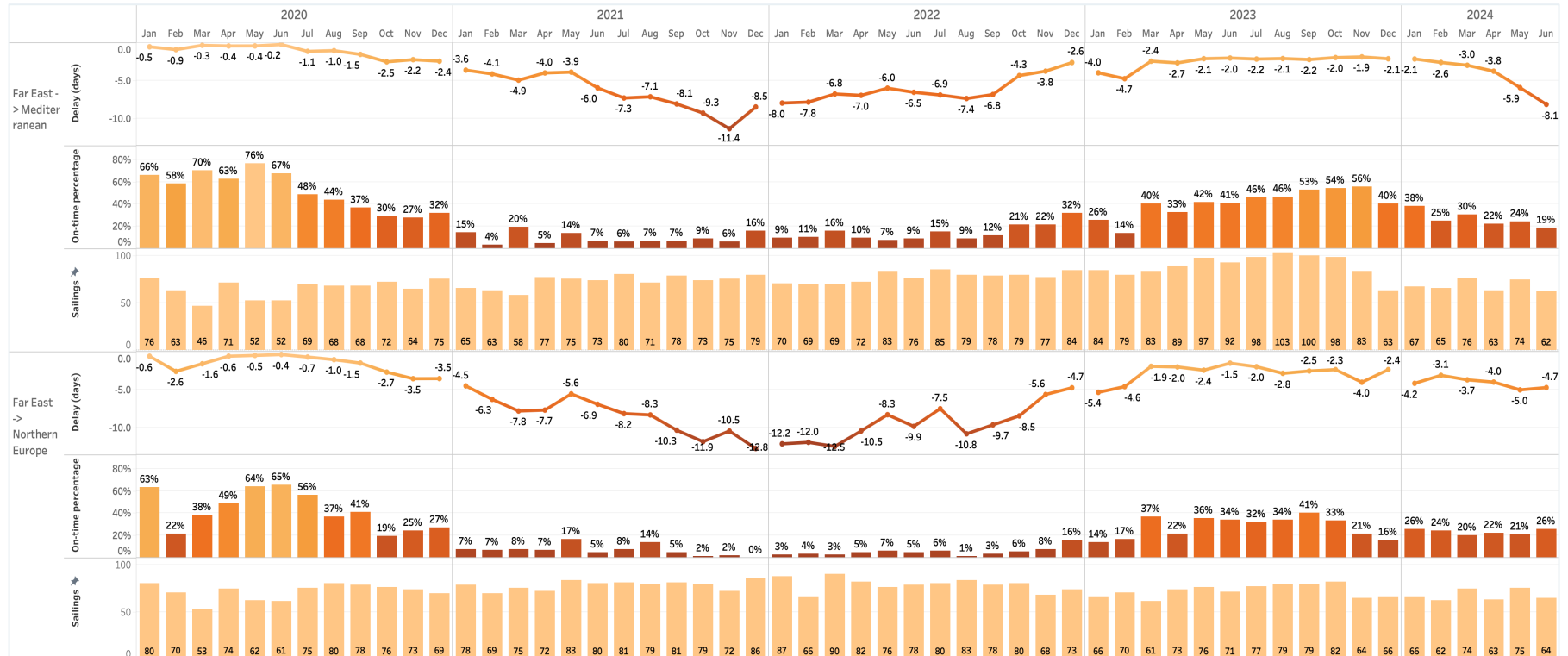
Schedule Reliability Scorecard (SRS)

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TRADE LANES

Far East → Europe



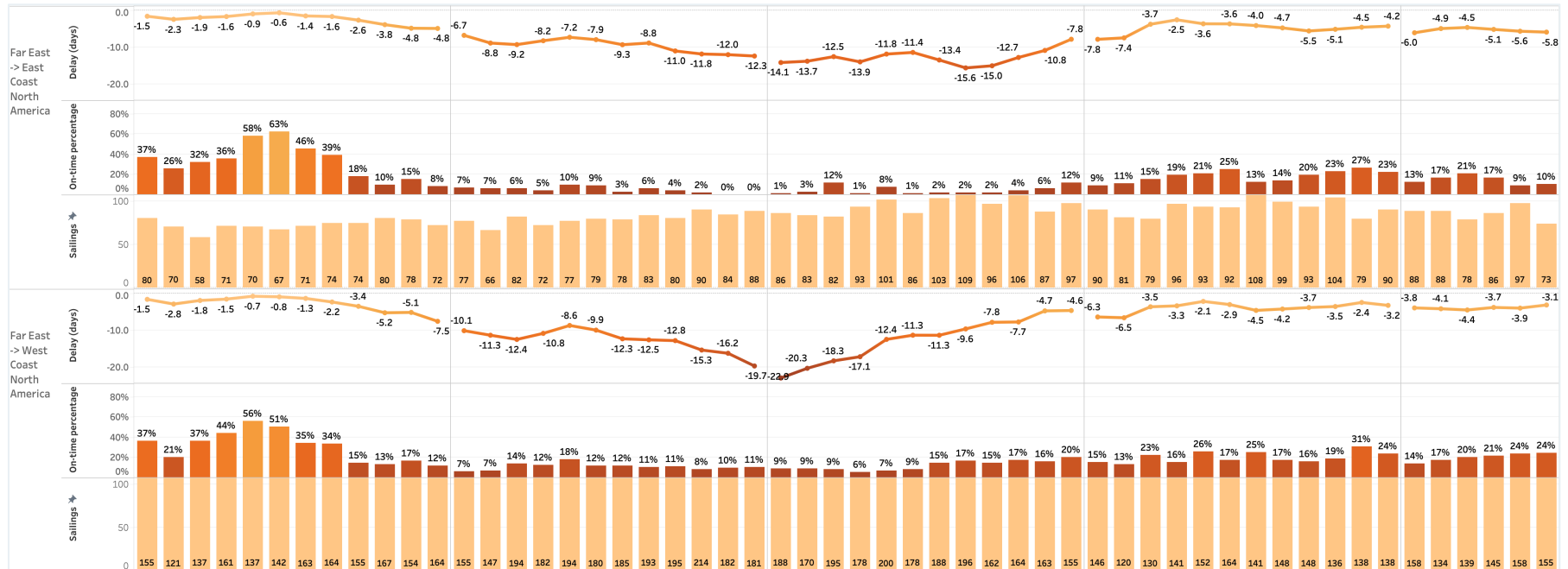
1. With average delays up by -1.0 days into Northern European ports and an additional -3.3 days into the Mediterranean in Q2, it's likely we'll also be in for a difficult Q3.
2. **2024 Q1 averages vs. 2024 Q2: -3.0 days, 25% OTP vs. -5.25 days, 22% OTP**
 - Med: -2.6 days, 31% OTP vs. -5.9 days, 22% OTP
 - NEUR: -3.6 days, 23% OTP vs. -4.6 days, 23% OTP
3. Extended transit around the Cape of Good Hope due to the Red Sea conflict, and thus shift in carriers' first discharge ports, may have contributed to the striking decline on the Med trade from Q1 (-2.6 days) to Q2 (-5.9 days).

Criteria

- Far East – Europe services, including NEUR and Med.
- Measured in the Westbound head haul.
- Only at first discharge port in NEUR or Med, berth arrival.

TRADE LANES

Far East → North America



- 2024 Q2 remains problematic across the board for EC & WC North America, but decline is not as dramatic as its sister E/W trade. West Coast North America stands out globally with a positive improvement.
- 2024 Q1 averages vs. 2024 Q2: -4.0 days, 22% OTP vs. -4.3 days, 20% OTP**
 - EC: -5.1 days, 17% OTP vs. -5.5 days, 12% OTP
 - WC: -4.1 days, 17% OTP vs. -3.6 days, 23% OTP
 - CAM/ CAR: -3.7 days, 28% OTP vs. -3.9 days, 24% OTP
- The EC continued to see notable decline in both days delay and OTP despite the steady return of services to Panama and Baltimore. The North American coasts mirrored one another with the EC adding another -0.4 days of delay and the WC bucking the trend by improving by 0.4 days.

Criteria

- Far East – North America services, incl EC and WC.
- Measured in the Eastbound head haul (SZC Westbound).
- Only at first discharge port in EC/WC, berth arrival.
- East Coast includes the US Gulf ports.

TRADE LANES

Europe FE & ME trades join worst performers in Q2

Service - trade lane - category		2020					2021					2022					2023					2024			Grand Total
		Q1	Q2	Q3	Q4	Total	Q1	Q2	Q3	Q4	Total	Q1	Q2	Q3	Q4	Total	Q1	Q2	Q3	Q4	Total	Q1	Q2	Total	
Delay - days	A: Europe - North America (E/W Primary)	-1.4	-0.9	-0.6	-1.8	-1.2	-3.9	-3.8	-4.1	-5.3	-4.2	-6.9	-5.8	-5.6	-3.5	-5.3	-2.8	-1.9	-1.3	-2.1	-2.0	-3.0	-2.8	-2.9	-3.0
	A: Far East - Europe (E/W Primary)	-1.6	-0.9	-1.3	-2.9	-1.7	-4.9	-5.8	-8.0	-9.5	-6.9	-9.1	-8.4	-8.4	-5.7	-7.9	-4.4	-2.7	-2.3	-2.6	-2.9	-3.4	-4.9	-4.2	-4.6
	A: Far East - North America (E/W Primary)	-1.7	-0.9	-1.8	-4.2	-2.2	-8.5	-8.5	-9.2	-11.0	-9.3	-12.3	-9.6	-9.2	-6.8	-9.4	-4.6	-2.7	-3.5	-3.3	-3.5	-4.1	-4.2	-4.1	-5.8
	A: Pendulum services (E/W Primary)	-1.0	-0.7	-1.3	-4.9	-2.1	-13.2	-13.3	-11.6	-11.6	-12.6	-13.7	-11.1	-9.4	-6.1	-10.6	-3.9	-2.1	-2.5	-4.1	-3.3	-7.8	-6.0	-6.8	-7.0
	B: Europe - Middle East (E/W Secondary)	-0.8	-0.6	-0.5	-0.9	-0.7	-1.6	-2.3	-1.8	-3.5	-2.3	-4.6	-4.3	-2.9	-1.8	-3.3	-1.8	-1.9	-1.4	-1.8	-1.7	-3.6	-5.3	-4.6	-2.2
	B: Far East - Middle East (E/W Secondary)	-0.9	-0.8	-2.0	-3.3	-1.8	-4.5	-5.5	-6.8	-8.0	-6.1	-7.1	-7.1	-5.2	-3.4	-5.5	-2.6	-2.1	-2.0	-2.1	-2.2	-3.1	-5.1	-4.1	-3.8
	B: North America - Middle East (E/W Secondary)	-1.1	-0.8	-0.2	-1.7	-1.0	-2.8	-3.9	-3.0	-4.4	-3.6	-6.0	-5.1	-7.1	-4.7	-5.7	-2.1	-2.0	-1.9	-1.3	-1.8	-2.0	-2.8	-2.4	-3.1
	C: Africa (N/S)	-1.9	-1.8	-2.1	-2.5	-2.1	-2.8	-2.4	-3.5	-3.8	-3.1	-3.9	-3.5	-2.6	-2.4	-3.1	-2.3	-2.1	-2.4	-2.8	-2.4	-3.4	-4.7	-4.0	-2.8
	C: Oceania (N/S)	-1.2	-1.3	-1.9	-4.0	-2.1	-4.6	-5.6	-6.5	-7.2	-5.9	-7.6	-8.1	-7.0	-4.8	-6.8	-3.5	-2.4	-2.2	-2.8	-2.7	-4.0	-4.6	-4.3	-4.3
	C: South America - East Coast (N/S)	-1.3	-1.2	-0.9	-1.6	-1.2	-2.8	-2.6	-4.9	-4.9	-3.7	-4.5	-4.8	-5.2	-3.8	-4.5	-3.5	-2.2	-2.7	-3.6	-3.0	-4.0	-4.6	-4.3	-3.2
	C: South America - West Coast (N/S)	-0.8	-0.4	-0.8	-1.1	-0.8	-2.0	-2.6	-3.8	-5.0	-3.3	-5.7	-4.6	-4.1	-3.6	-4.4	-2.6	-1.6	-1.4	-1.7	-1.8	-2.2	-2.1	-2.2	-2.5
Delay - d..	Total	-1.4	-1.0	-1.4	-2.7	-1.6	-4.5	-4.8	-5.8	-6.9	-5.5	-7.4	-6.6	-6.0	-4.2	-6.0	-3.2	-2.2	-2.2	-2.6	-2.5	-3.5	-4.2	-3.8	-3.8

1. Apart from Europe-North America, Pendulum Services, and West Coast-South America, all trades saw a decline in 2024 Q2.
2. Europe-Middle East, and West Coast-South America, still hold the lowest total average delays. Alternately, a comparison of YTD stats alone shows that North America-Middle East, and West Coast-South America, are tied for first (-1.9 days), followed by Europe-North America (-2.3 days).
3. Far East-North America, and Pendulum Services, may still be the worst cumulative performers, but Q2 reveals that Far East-Middle East, and Europe-Middle East, have both recently jumped the -5.0 days delay threshold, and could continue their decline in Q3. These 4-year averages could yield very different results at the end of 2024.

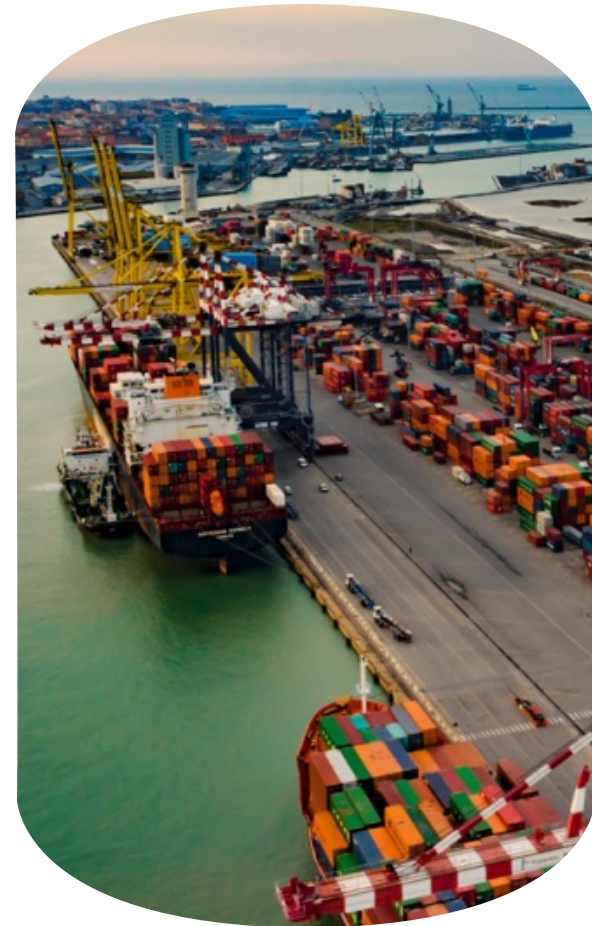
Criteria

- All mainline E/W and N/S services, excl feeders/intras.
- All ports on service rotation. Previous 2 slides head hauls only.
- Berth arrivals only.
- Delays = negative numbers.

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REGIONS & PORTS

Top 50 reliable ports ranking

1	Livorno / Leghorn	EUR - Southern Europe	Avg delay: -1.44 days 45% on-time (12 hrs) Services: 13
2	Bremerhaven / Bremen	EUR - Northern Europe	Avg delay: -1.55 days 45% on-time (12 hrs) Services: 26
3	Guayaquil	SAM - West Coast South America	Avg delay: -1.62 days 59% on-time (12 hrs) Services: 16
4	Tianjin / Xingang	ASI - North East Asia (incl China)	Avg delay: -1.80 days 38% on-time (12 hrs) Services: 26
5	Le Havre	EUR - Northern Europe	Avg delay: -1.82 days 46% on-time (12 hrs) Services: 31
6	Southampton	EUR - Northern Europe	Avg delay: -1.88 days 58% on-time (12 hrs) Services: 14
7	Xiamen	ASI - North East Asia (incl China)	Avg delay: -1.89 days 39% on-time (12 hrs) Services: 51
8	Gioia Tauro	EUR - Southern Europe	Avg delay: -1.90 days 40% on-time (12 hrs) Services: 15
9	Tin Can Island / Lagos	AFR - West Africa	Avg delay: -1.95 days 41% on-time (12 hrs) Services: 13
10	Genoa	EUR - Southern Europe	Avg delay: -1.97 days 38% on-time (12 hrs) Services: 27
11	Yantian	ASI - North East Asia (incl China)	Avg delay: -2.01 days 37% on-time (12 hrs) Services: 72
12	Cai Mep / Vung Tau	ASI - South East Asia	Avg delay: -2.07 days 34% on-time (12 hrs) Services: 30
13	Callao	SAM - West Coast South America	Avg delay: -2.11 days 50% on-time (12 hrs) Services: 17
14	Buenaventura	SAM - West Coast South America	Avg delay: -2.11 days 46% on-time (12 hrs) Services: 15
15	Nhava Sheva / Jawaharlal Nehru	MEA - Indian Subcontinent	Avg delay: -2.16 days 45% on-time (12 hrs) Services: 57
16	Qingdao	ASI - North East Asia (incl China)	Avg delay: -2.19 days 32% on-time (12 hrs) Services: 99
17	Manzanillo / Colon (PA)	NAM - Central America	Avg delay: -2.20 days 45% on-time (12 hrs) Services: 18
18	London Gateway	EUR - Northern Europe	Avg delay: -2.23 days 38% on-time (12 hrs) Services: 21
19	Tanjung Pelepas	ASI - South East Asia	Avg delay: -2.24 days 35% on-time (12 hrs) Services: 34
20	Abidjan	AFR - West Africa	Avg delay: -2.27 days 34% on-time (12 hrs) Services: 20
21	Marseille Fos	EUR - Southern Europe	Avg delay: -2.28 days 35% on-time (12 hrs) Services: 15
22	Nansha	ASI - North East Asia (incl China)	Avg delay: -2.29 days 33% on-time (12 hrs) Services: 57
23	Ningbo-Zhoushan	ASI - North East Asia (incl China)	Avg delay: -2.34 days 28% on-time (12 hrs) Services: 175
24	Antwerp	EUR - Northern Europe	Avg delay: -2.35 days 37% on-time (12 hrs) Services: 59
25	Laem Chabang	ASI - South East Asia	Avg delay: -2.37 days 38% on-time (12 hrs) Services: 19
26	Shanghai	ASI - North East Asia (incl China)	Avg delay: -2.39 days 27% on-time (12 hrs) Services: 194
27	Balboa / Rodman	NAM - Central America	Avg delay: -2.42 days 47% on-time (12 hrs) Services: 21
28	Long Beach	NAM - West Coast North America	Avg delay: -2.43 days 28% on-time (12 hrs) Services: 21
29	Tanger Med / Tangier	AFR - North Africa	Avg delay: -2.48 days 33% on-time (12 hrs) Services: 44
30	Algeciras	EUR - Southern Europe	Avg delay: -2.55 days 37% on-time (12 hrs) Services: 42
31	Mundra	MEA - Indian Subcontinent	Avg delay: -2.59 days 39% on-time (12 hrs) Services: 56
32	Valencia	EUR - Southern Europe	Avg delay: -2.60 days 32% on-time (12 hrs) Services: 43
33	Shekou	ASI - North East Asia (incl China)	Avg delay: -2.61 days 27% on-time (12 hrs) Services: 78
34	Tauranga	OCE - Oceania	Avg delay: -2.61 days 44% on-time (12 hrs) Services: 11
35	Cartagena (CO)	SAM - North Coast South America	Avg delay: -2.68 days 40% on-time (12 hrs) Services: 20
36	Kaohsiung	ASI - North East Asia (incl China)	Avg delay: -2.71 days 31% on-time (12 hrs) Services: 42
37	Sines	EUR - Northern Europe	Avg delay: -2.80 days 17% on-time (12 hrs) Services: 13
38	Lome	AFR - West Africa	Avg delay: -2.87 days 36% on-time (12 hrs) Services: 18
39	Piraeus	EUR - Southern Europe	Avg delay: -2.91 days 28% on-time (12 hrs) Services: 17
40	Aqaba	MEA - Red Sea & Horn of Africa	Avg delay: -2.94 days 15% on-time (12 hrs) Services: 10
41	Tema	AFR - West Africa	Avg delay: -2.97 days 36% on-time (12 hrs) Services: 25
42	Ambarli / Istanbul	EUR - Eastern Mediterranean	Avg delay: -2.98 days 38% on-time (12 hrs) Services: 19
43	Veracruz	NAM - Central America	Avg delay: -3.01 days 26% on-time (12 hrs) Services: 16
44	Barcelona	EUR - Southern Europe	Avg delay: -3.02 days 28% on-time (12 hrs) Services: 29
45	Los Angeles	NAM - West Coast North America	Avg delay: -3.03 days 24% on-time (12 hrs) Services: 25
46	Jeddah	MEA - Red Sea & Horn of Africa	Avg delay: -3.06 days 36% on-time (12 hrs) Services: 48
47	Rotterdam	EUR - Northern Europe	Avg delay: -3.06 days 27% on-time (12 hrs) Services: 52
48	Hong Kong	ASI - North East Asia (incl China)	Avg delay: -3.11 days 30% on-time (12 hrs) Services: 53
49	Hai Phong	ASI - South East Asia	Avg delay: -3.15 days 19% on-time (12 hrs) Services: 16
50	Karachi	MEA - Indian Subcontinent	Avg delay: -3.15 days 30% on-time (12 hrs) Services: 21

Criteria: • 2023 Q3 – 2024 Q2 aggregate data. • Number of services = total unique services hosted by port over 12-month period. • OTP within 12-hour delay threshold.

Asia & Europe Dominate Top 20 Reliable Ports

Europe dominates Top-10

- Livorno gained back 0.7 days of reliability in Q2 (-1.44 days, 49% OTP), along with its 1st place.
- Bremerhaven (-1.55 days, 45% OTP) and Guayaquil (-1.62 days, 59% OTP) were close behind in 2nd and 3rd place.
- Despite increased delay against Q1, newcomer Genoa (-1.97 days, 38% OTP) joined the ranks of the Top-10, up from 20th place in Q1.
- Top-10 in Q2 sees six European ports in the top global performers.

Transshipment hubs face setbacks

- Singapore, one of the world's largest transshipment hubs, came close to entering the Top-50 in Q2, but gained -2 days in average delay and fell from 62nd to 66th – likely due in part to severe congestion that lasted for 6 weeks.
- Tanger Med only declined by -0.2 days from Q1 (-3.3 days, 22% OTP) to Q2 (-3.5 days, 27% OTP) – dropping from 24th to 29th place after suffering from serious congestion between March and April.
- Spanish transshipment ports' ascent in Q1 was short lived – Valencia fell from 25th to 32nd place, and Barcelona from 33rd to 44th, after they both suffered around -2 days reliability decline in Q2.

Top-50 rising contenders

- Piraeus is back in the Top-50 for the first time since 2021, to 39th place from 59th in Q1.
- Long Beach has moved up to 28th place from 44th in Q1, and Los Angeles joined the ranks of the Top-50 in 45th place, up from 55th in Q1.
- Callao jumped to 13th place from 29th and would make it into the Top-10 in 7th place if we used standalone Q2 rankings.
- Tauranga reached the Top-50, in 34th place up from 50th in Q1, which it achieved simply by staying steady with barely -0.1 days of decline.
- Seattle modestly inched up to 69th place from 75th, but the positive trend and full 2 days gain (-3.1 days, 49% OTP) this port may make it into the Top-50 in Q3. However, with just 10 services in Q2, if she loses any, she may not qualify for evaluation.

REGIONS & PORTS

Top 50 Reliability Evolution

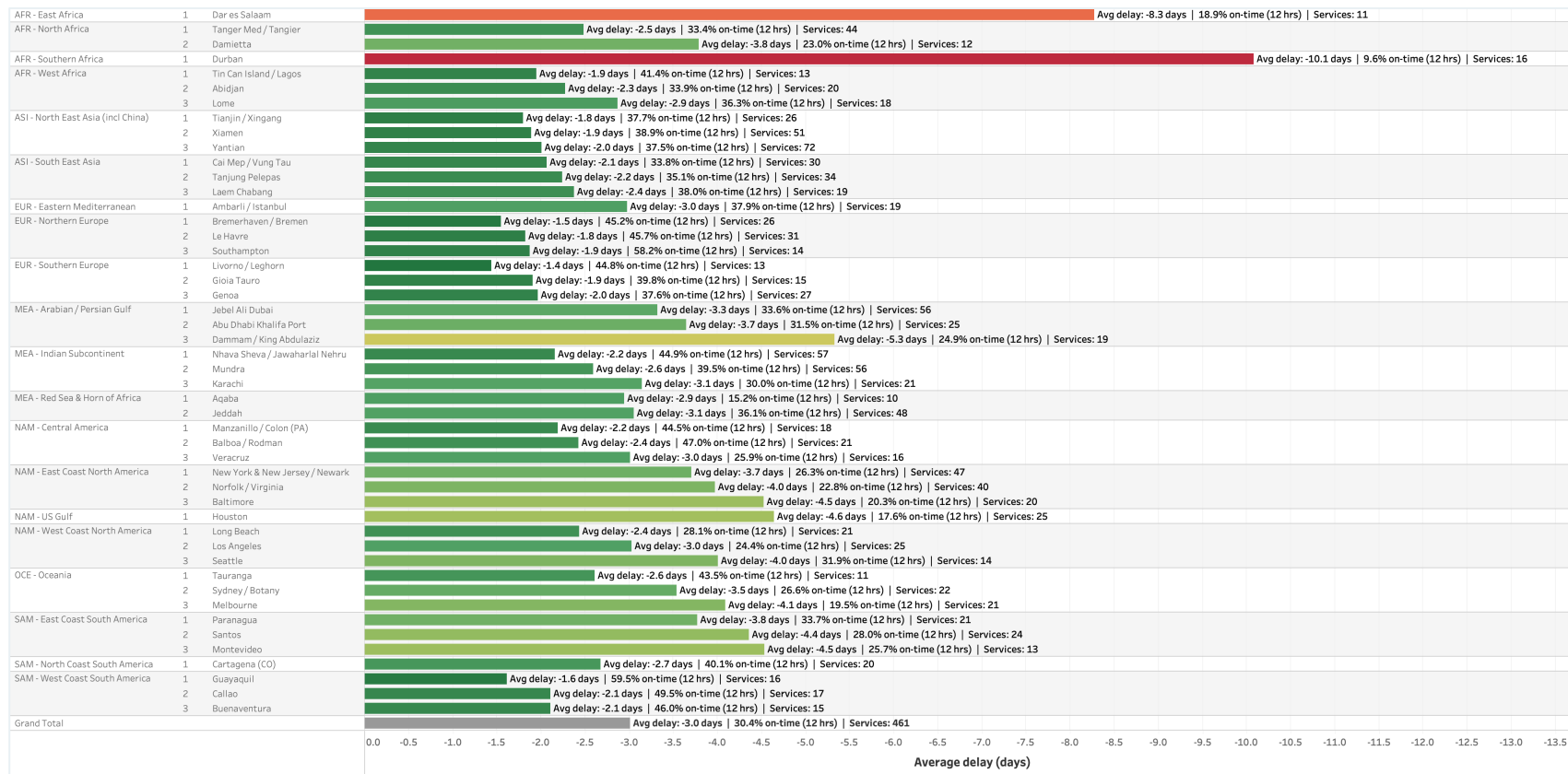
	Port - name	2023			2024			Grand Total
		Q3	Q4	Total	Q1	Q2	Total	
Delay - days	Abidjan	-2.0	-2.6	-2.3	-1.6	-3.0	-2.3	-2.3
	Abu Dhabi Khalifa Port	-3.1	-2.1	-2.7	-3.4	-6.3	-5.0	-3.7
	Algeciras	-1.3	-1.8	-1.5	-2.9	-4.4	-3.7	-2.5
	Altamira	-1.7	-4.2	-2.9	-4.0	-4.3	-4.2	-3.5
	Ambarli / Istanbul	-2.4	-1.3	-1.9	-2.8	-5.7	-4.3	-3.0
	Antwerp	-1.0	-2.2	-1.6	-2.9	-3.6	-3.2	-2.3
	Balboa / Rodman	-2.0	-2.2	-2.1	-3.1	-2.5	-2.8	-2.4
	Baltimore	-3.6	-3.9	-3.7	-5.6	-6.6	-5.9	-4.5
	Barcelona	-1.7	-2.6	-2.1	-2.6	-5.2	-3.9	-3.0
	Bremerhaven / Bremen	-0.8	-1.7	-1.2	-1.8	-1.9	-1.8	-1.5
	Brisbane	-2.9	-4.5	-3.6	-6.2	-5.4	-5.8	-4.7
	Buenaventura	-1.4	-1.6	-1.5	-2.5	-3.0	-2.8	-2.1
	Busan / Pusan	-3.3	-2.9	-3.1	-3.5	-4.0	-3.7	-3.4
	Cai Mep / Vung Tau	-1.6	-1.9	-1.8	-1.9	-2.8	-2.4	-2.1
	Callao	-1.6	-1.9	-1.7	-2.6	-2.4	-2.5	-2.1
	Cartagena (CO)	-2.2	-2.0	-2.1	-3.3	-3.3	-3.3	-2.7
	Charleston	-3.4	-3.5	-3.4	-4.9	-6.6	-5.8	-4.6
	Colombo	-1.9	-1.7	-1.8	-4.1	-6.4	-5.2	-3.4
	Dakar	-3.6	-3.4	-3.5	-2.6	-3.4	-3.0	-3.2
	Dammam / King Abdulaziz	-3.2	-2.3	-2.7	-4.6	-10.9	-8.0	-5.3
	Durban	-6.6	-13.1	-9.6	-9.4	-11.9	-10.6	-10.1
	Genoa	-1.4	-2.0	-1.7	-1.7	-2.9	-2.3	-2.0
	Gioia Tauro	-0.9	-0.8	-0.8	-1.6	-4.5	-3.1	-1.9
	Guayaquil	-0.7	-1.2	-1.0	-1.9	-2.9	-2.4	-1.6
	Hai Phong	-2.1	-3.1	-2.6	-4.3	-3.1	-3.7	-3.1
	Halifax	-2.3	-3.9	-3.1	-7.1	-6.1	-6.6	-4.8
	Hamburg	-1.4	-2.5	-1.9	-3.9	-5.2	-4.6	-3.2
	Hong Kong	-2.3	-3.0	-2.7	-3.3	-3.9	-3.6	-3.1
	Houston	-3.9	-5.3	-4.6	-5.2	-4.2	-4.7	-4.6
	Jebel Ali Dubai	-2.4	-2.3	-2.3	-3.4	-5.9	-4.6	-3.3
	Jeddah	-2.4	-2.8	-2.6	-4.9	-4.9	-4.9	-3.1
	Kaohsiung	-2.5	-2.5	-2.5	-3.5	-2.5	-2.9	-2.7
	Karachi	-1.6	-1.8	-1.7	-2.7	-6.4	-4.7	-3.1
	Kwangyang / Gwangyang	-3.4	-4.0	-3.7	-4.8	-3.4	-4.1	-3.9
	Laem Chabang	-1.0	-1.8	-1.4	-2.6	-4.6	-3.6	-2.4
	Le Havre	-1.0	-1.9	-1.4	-2.4	-2.1	-2.3	-1.8
	Livorno / Leghorn	-0.9	-1.5	-1.2	-2.0	-1.3	-1.7	-1.4
	Lome	-2.5	-2.4	-2.4	-3.5	-3.2	-3.4	-2.9
	London Gateway	-1.0	-2.0	-1.5	-2.6	-3.6	-3.1	-2.2
	Long Beach	-3.0	-1.9	-2.5	-2.3	-2.5	-2.4	-2.4
	Los Angeles	-3.0	-2.7	-2.8	-3.7	-2.7	-3.2	-3.0

Port - name	2023			2024			Grand Total
	Q3	Q4	Total	Q1	Q2	Total	
Manzanillo (MX)	-2.7	-3.2	-2.9	-3.6	-3.9	-3.8	-3.3
Manzanillo / Colon (PA)	-1.8	-1.8	-1.8	-2.1	-3.3	-2.7	-2.2
Marseille Fos	-1.1	-2.2	-1.7	-2.2	-3.4	-2.9	-2.3
Melbourne	-2.7	-5.0	-3.7	-4.5	-4.4	-4.4	-4.1
Montevideo	-3.4	-5.1	-4.2	-5.0	-4.8	-4.9	-4.5
Mundra	-1.7	-1.6	-1.7	-2.5	-4.7	-3.6	-2.6
Nansha	-1.6	-1.8	-1.7	-2.4	-3.3	-2.9	-2.3
New York & New Jersey / ...	-2.3	-3.3	-2.8	-4.7	-4.7	-4.7	-3.7
Nhava Sheva / Jawaharlal...	-1.3	-1.3	-1.3	-2.0	-4.0	-3.1	-2.2
Ningbo-Zhoushan	-1.9	-1.8	-1.9	-2.4	-3.1	-2.8	-2.3
Norfolk / Virginia	-3.2	-3.4	-3.3	-4.7	-4.6	-4.6	-4.0
Oakland	-3.9	-4.4	-4.2	-6.1	-3.8	-4.9	-4.6
Paranagua	-2.6	-4.0	-3.3	-3.8	-4.7	-4.2	-3.8
Piraeus	-2.7	-2.9	-2.8	-2.8	-3.5	-3.1	-2.9
Port Klang	-1.9	-2.4	-2.2	-3.9	-5.5	-4.6	-3.3
Qingdao	-1.4	-1.8	-1.6	-2.2	-3.3	-2.8	-2.2
Rotterdam	-1.8	-2.9	-2.3	-3.4	-4.3	-3.9	-3.1
Santos	-3.1	-4.0	-3.5	-4.8	-5.6	-5.2	-4.4
Savannah	-4.6	-4.6	-4.6	-5.6	-5.5	-5.6	-5.1
Seattle	-4.2	-3.4	-3.8	-5.1	-3.1	-4.2	-4.0
Shanghai	-1.9	-1.7	-1.8	-2.4	-3.4	-3.0	-2.4
Shekou	-2.2	-1.9	-2.1	-2.8	-3.4	-3.1	-2.6
Sines	-2.0	-2.4	-2.2	-3.2	-3.7	-3.5	-2.8
Singapore	-2.5	-3.1	-2.7	-4.2	-6.2	-5.2	-3.9
Southampton	-1.1	-1.9	-1.5	-2.1	-2.5	-2.3	-1.9
Sydney / Botany	-1.8	-3.8	-2.6	-4.7	-4.3	-4.5	-3.5
Tanger Med / Tangier	-1.3	-1.9	-1.6	-3.3	-3.5	-3.4	-2.5
Tanjung Pelepas	-1.4	-1.5	-1.5	-2.8	-3.4	-3.1	-2.2
Tauranga	-2.4	-1.9	-2.2	-3.0	-3.1	-3.1	-2.6
Tema	-2.8	-2.8	-2.8	-2.1	-4.4	-3.2	-3.0
Tianjin / Xingang	-0.9	-2.0	-1.4	-2.0	-2.3	-2.2	-1.8
Tin Can Island / Lagos	-0.9	-2.7	-1.8	-1.9	-2.3	-2.1	-1.9
Valencia	-1.4	-2.2	-1.8	-2.6	-4.3	-3.5	-2.6
Vancouver	-7.7	-4.5	-6.0	-6.9	-5.1	-6.0	-6.0
Veracruz	-1.3	-4.1	-2.6	-3.3	-3.5	-3.4	-3.0
Xiamen	-1.5	-1.4	-1.4	-2.4	-2.4	-2.4	-1.9
Yantian	-1.9	-1.6	-1.7	-1.7	-2.7	-2.3	-2.0
Yokohama	-3.1	-2.8	-2.9	-4.3	-4.3	-4.3	-3.6

- Some ports like Livorno and Le Havre saw true improvement in reliability, while for most it was a matter of adding as little delay as possible in a volatile environment.
- Q2 vs. YTD rankings could paint a very different picture: Gioia Tauro would be all the way down in 54th place after adding nearly -3.0 days of delay in Q2.
- London Gateway would be all the way down in 38th in Q2 standalone rankings, after losing -1 day of reliability since Q1.
- On the other hand, Le Havre would be in the Top 3 for Q2 alone, having improved by 0.3 days.
- With an improvement of 0.2 days, Long Beach would find itself in the Top-10 if we focused only on Q2, and Seattle would rank 21st.

REGIONS & PORTS

Top regional ports

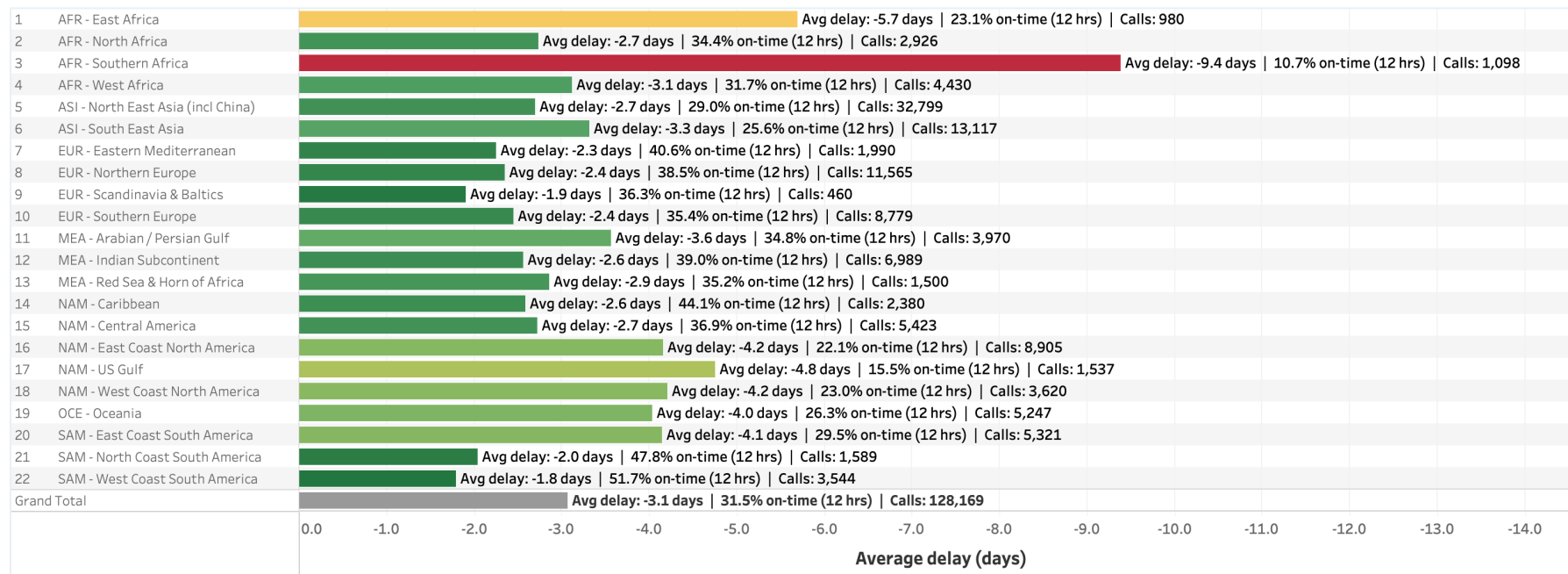


- Top-3 ports for each of eeSea's 21 defined coastal regions.
- NAM East Coast: New York/ New Jersey tops ranking with -3.7 days delay – ahead of Norfolk/ Virginia at -4.0 days, and Baltimore with -4.5 days. Charleston dropped out of their Q1 2nd place.
- NAM West Coast: Long Beach remains in 1st place with slightly improved -2.4 days delay – followed by Los Angeles with -3.0 days and Seattle with -4.0 days.

Criteria

- At least 10 main liner services, excluding feeders/intras.
- 2023 Q3 – 2024 Q2 aggregate numbers.
- Berth arrivals only.

Regional rankings



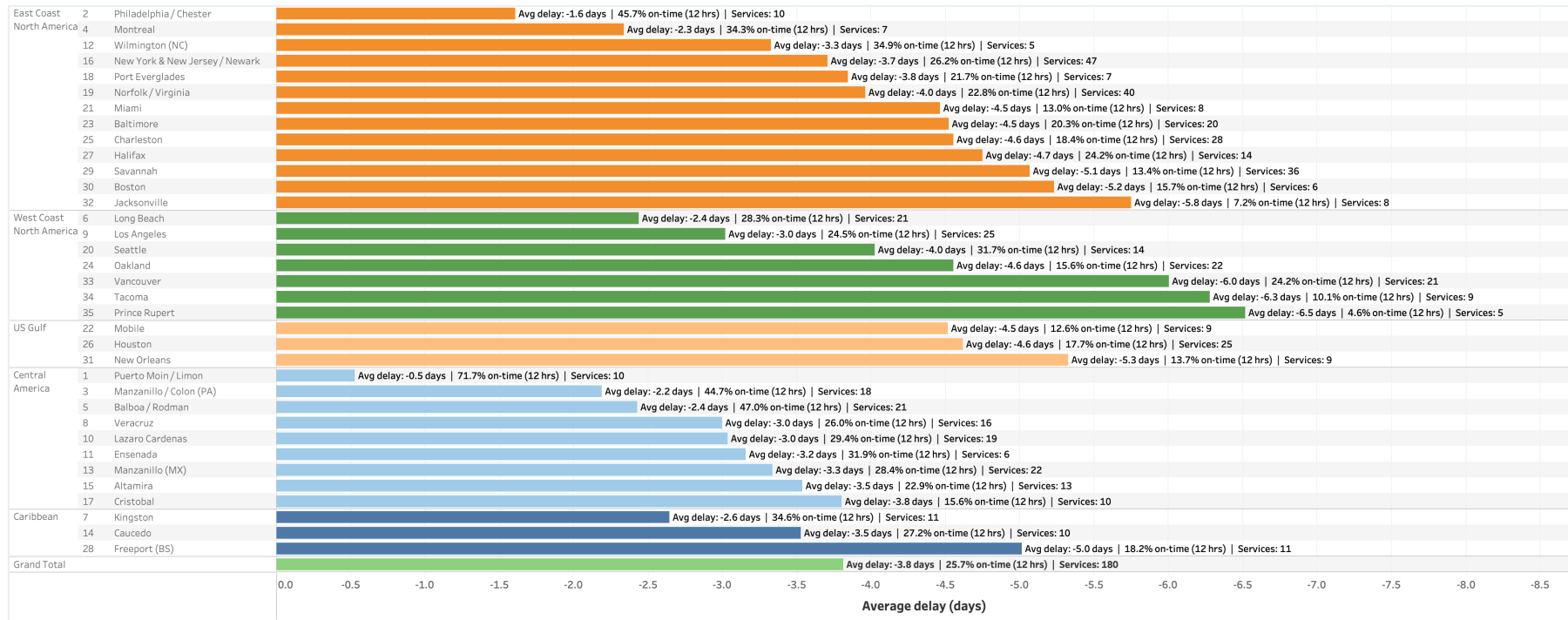
- Scandinavia, West & North Coast South America remain in the Top-3 performing regions with West Coast South America taking the lead (-1.8 days), Northern Europe and Indian Subcontinent remain the best performing regions.
- The Eastern Mediterranean (-2.3 days) has edged out both Northern and Southern Europe for a spot just behind the Top-3, and the Indian Subcontinent (-2.6 days) fell from 4th to 7th place in Q2 after adding -0.7 days in delay.
- Among ports with over 5,000 calls per year, Northern & Southern Europe, and the Indian Subcontinent still lead the way in the rankings.

Criteria

- All main liner services into all ports, excluding feeders/intras.
- 2023 Q3 – 2024 Q2 aggregate numbers.
- Berth arrivals only.

REGIONS & PORTS

North America



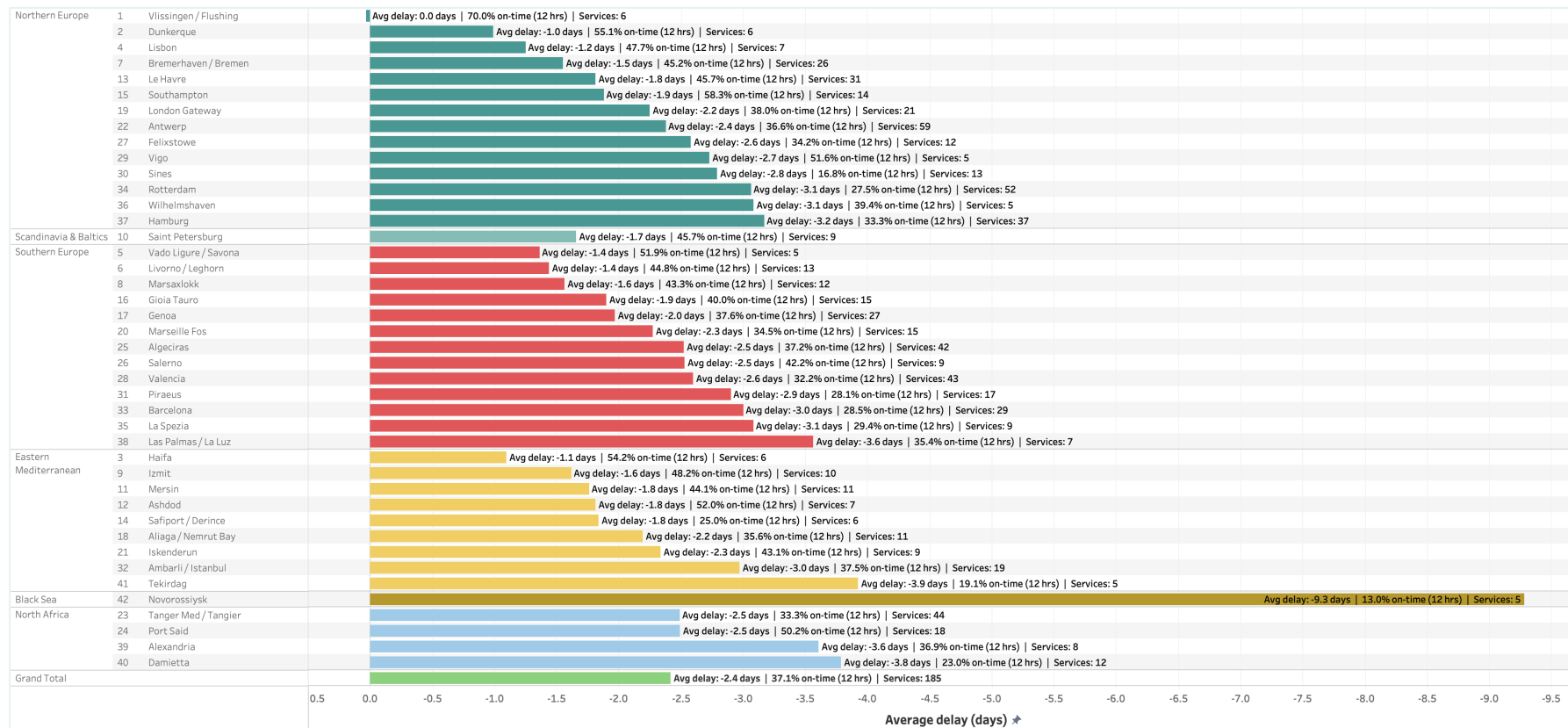
1. Ranking of top players remain the same for both EC & WC in Q2, but Charleston was bumped out of 5th place following congestion issues beginning in May resulting in a -1 day increased average delay.
2. Mobile (-4.5 days, 13% OTP) bumped Houston out of 1st place in the US Gulf even though Houston's reliability improved by 0.1 days from Q1.
3. Apart from Vancouver and Oakland, ports with 20+ services on the WC tended to perform better than their counterparts on the EC: Los Angeles and Long Beach both saw true reliability and OTP improvements in Q2.

Criteria

- At least 5 main liner services, excluding feeders/intras.
- 2023 Q3 – 2024 Q2 aggregate numbers.
- Berth arrivals only.

REGIONS & PORTS

Europe & Northern Africa



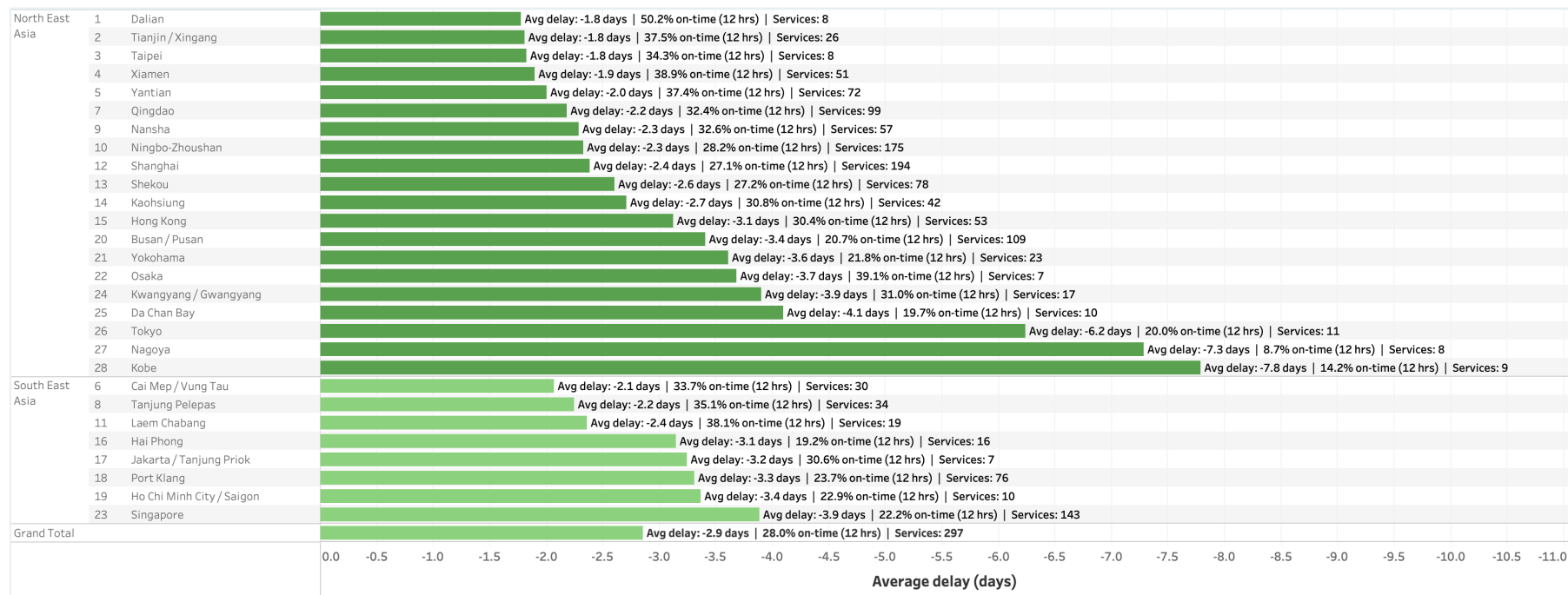
- SEUR: Naples dropped from the list entirely, Gioia Tauro dropped from 2nd to 4th, Marsaxlokk held fast despite an additional -0.3 days delay, and Vado Ligure jumped from 5th to 1st place after gaining 0.1 day in reliability from Q1.
- NEUR: Top-4 remain the unchanged, but Lisbon moved ahead of Bremerhaven in Q2; Top-3 performers with 20+ services are Bremerhaven, Le Havre, and London Gateway.
- Despite falling in the global rankings and suffering chronic congestion, Tanger Med moved into 1st place in the North Africa region ahead of Port Said.

Criteria

- At least 5 main liner services, excluding feeders/intras.
- 2023 Q3 – 2024 Q2 aggregate numbers.
- Berth arrivals only.
- North African ports included here for comparison to other Mediterranean ports.

REGIONS & PORTS

Far East



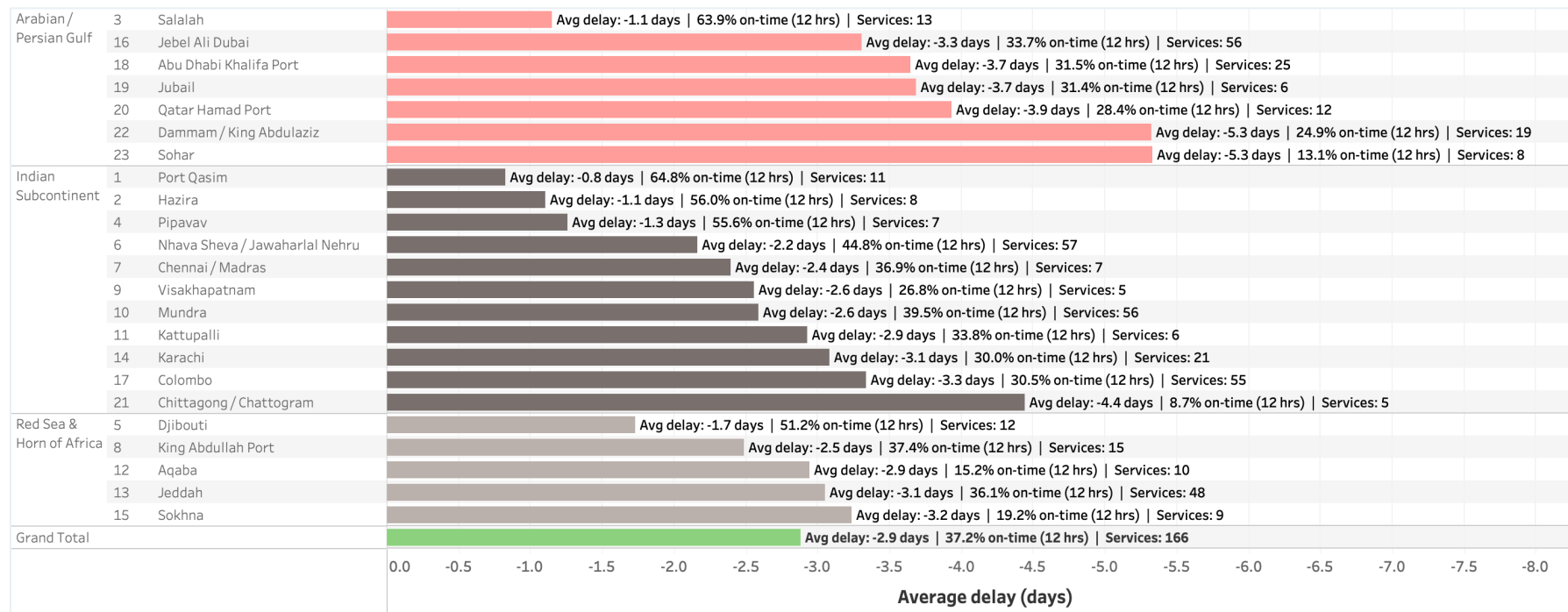
1. SEA: After a difficult quarter Singapore is still the lowest ranked port, including contenders outside the Top-50, gaining over -0.7 days of YTD-average delay in Q2.
2. Taipei improved by 0.8 days since Q1 and jumped ahead to 3rd up from 8th place. Ningbo has moved just ahead of Shanghai which stays close in 9th despite an increased -0.4 days delay.
3. Of the 10 largest ports (50+ services) in our Top-50 global ranking, 7 of them are located in NEA: Shanghai, Ningbo, Qingdao, Shekou, Yantian, Nansha, and Hong Kong.

Criteria

- At least 5 main liner services, excluding feeders/intras.
- 2023 Q3 – 2024 Q2 aggregate numbers.
- Berth arrivals only.
- North East Asia includes China.

REGIONS & PORTS

Middle East



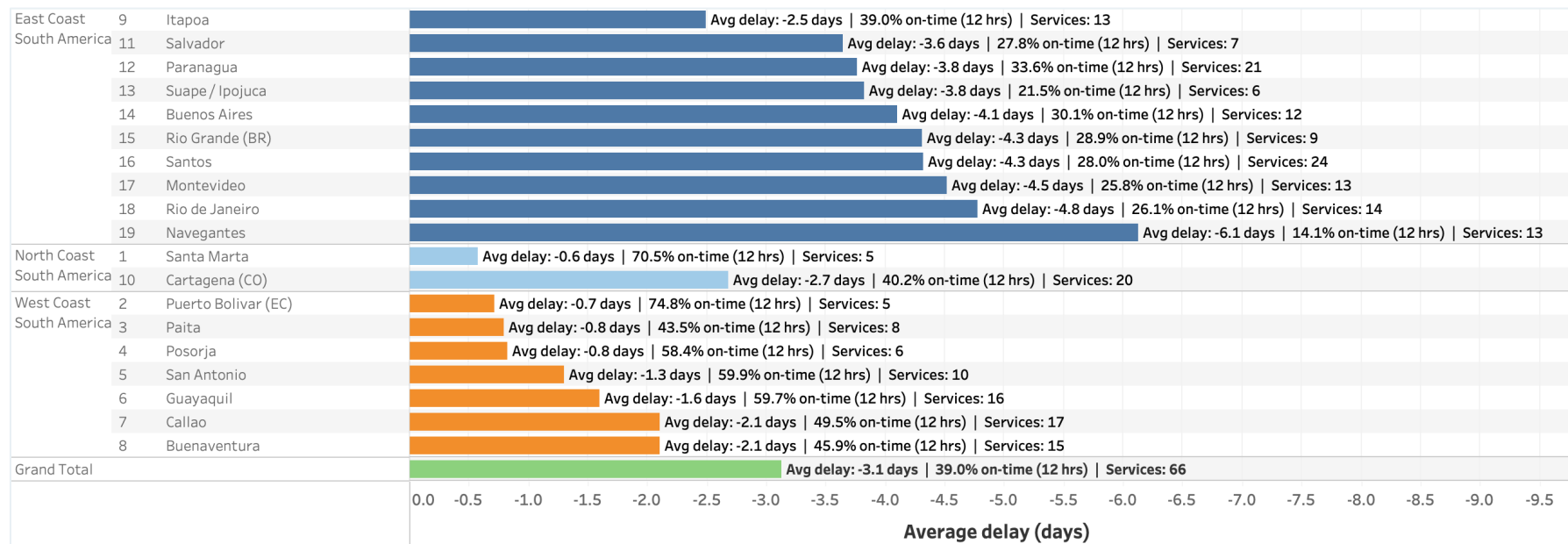
1. The Indian Subcontinent fell in regional rankings. Although the rankings between regional ports remain largely unchanged – all ports outside of the Top-3 have declined considerably – quite a few of them adding -1 days or more.
2. All but 5 ports in the ME region considerably increased delays; most by -1 days or more, and some like Sohar even by more than -2 days of additional delay.
3. Three improved ports are in the Red Sea region: Djibouti, Aqaba, and Sokhna have gained 0.6 days of reliability since Q1, and they all saw a gain in total unique services as well.

Criteria

- At least 5 main liner services, excluding feeders/intras.
- 2023 Q3 – 2024 Q2 aggregate numbers.
- Berth arrivals only.

REGIONS & PORTS

South America



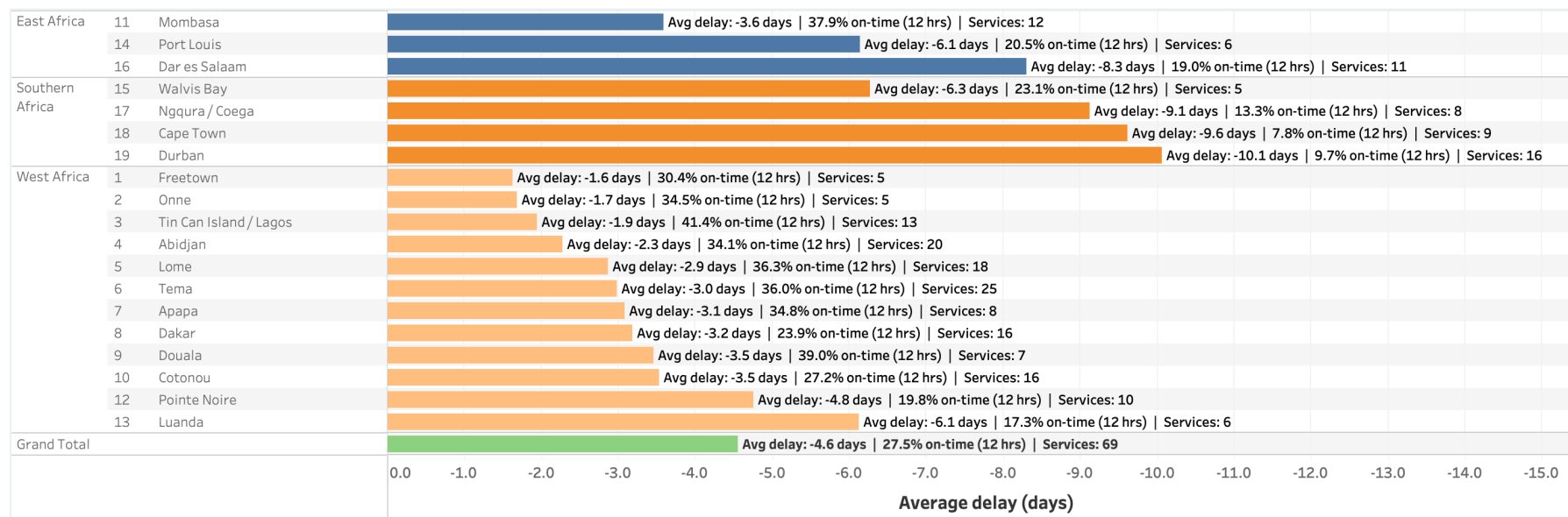
1. WCSA: remains the best performing region globally, but its ports get little representation in the Top 50 due to their limited number of services; only Guayaquil in 3rd, Callao in 13th, Buenaventura in 14th, and Cartagena (CO) in 35th place qualified with minimum 10 services per port.
2. ECSA: remains mostly unchanged in its port rankings but saw decreasing reliability across all ports. Salvador and Paranagua have shifted into 2nd and 3rd place despite each losing -0.5 days and -0.7 days in YTD-averages.
3. The decline in reliability on the East Coast may stem from a large number of services that have returned to their traditional Panama routes in Q2.

Criteria

- At least 5 main liner services, excluding feeders/intras.
- 2023 Q3 – 2024 Q2 aggregate numbers.
- Berth arrivals only.

REGIONS & PORTS

Africa



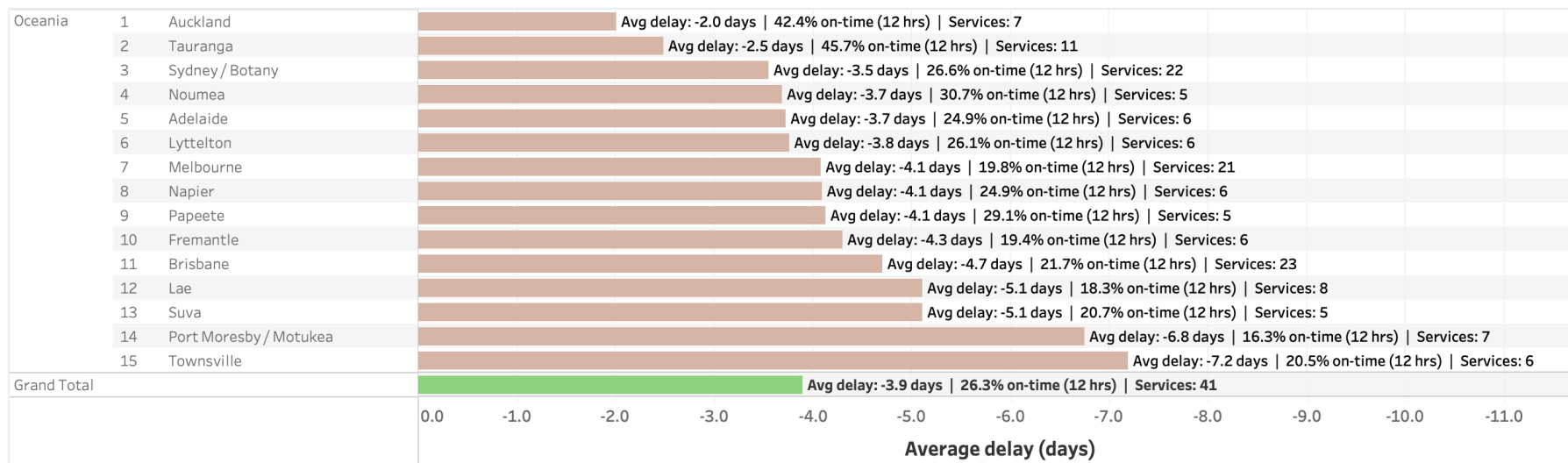
1. West African ports continued to be resilient albeit a moderate decline. Freetown took the lead in Q2 after staying steady at -1.6 days, and at the other end of the spectrum Point Noire and Luanda lost -0.5 days and -1.0 days of reliability.
2. In contrast, Southern Africa is still one of the worst performing regions globally and Durban & Cape Town continue their decline – both losing more than -2 days of reliability since Q1. Aside from Walvis Bay in the lead with -6.3 days, all SAF top performers carry more than -9.0 days average delay.
3. No change to the rankings in East Africa but all ports declined considerably, all gaining between -1 and -3 days of delay.

Criteria

- At least 5 main liner services, excluding feeders/intras.
- 2023 Q3 – 2024 Q2 aggregate numbers.
- Berth arrivals only.

REGIONS & PORTS

Oceania



1. Auckland and Tauranga maintained 1st and 2nd place, with each of them gaining 0.3 days of improved YTD-average reliability in Q2.
2. Oceania's three largest ports: Sydney, Melbourne, and Brisbane, all took on around -0.5 days increased delay, but Sydney held onto 3rd place in the regional ranking.
3. Tauranga was the only Oceania port to make the Top-50 global ranking with -2.6 days, 44% OTP in Q2.

Criteria

- At least 5 main liner services, excluding feeders/intras.
- 2023 Q3 – 2024 Q2 aggregate numbers.
- Berth arrivals only.

Notes & criteria

Why prefer average delay over percentage OTP?

- Both measures are relevant, but OTP can be harder to interpret relevantly.
- Average delay is impacted by outliers; a 10-day delay drags down the overall average. This is relevant for the overall port impression.
- OTP percentage requires a discussion of what constitutes on-time: less than 12 hours delay, or maybe 8 hours? This is individual to ports, trades, and stakeholders – we believe this makes it harder to use alone as the global standard of comparison.

Reflecting a port's performance: yes and no

- Delays into a port can be caused both by the carrier arriving late, the port being congested, inclement weather, improper handling of communication channels – or a myriad of other directly and indirectly impacting situations.
- The data does not provide or delineate types of delay by 'reason' – it simply states the fact that a vessel was late compared to the intended proforma arrival/ departure.
- Delay rankings do not reflect on a port's ability to act as a regional gateway or transshipment hub, it is not a comprehensive measure of a port's health and potential.

Top 50 Entry Requirements

- A port must serve at least 10 main line services, excluding feeders and intra-regionals.
- It must do this during 4 consecutive quarters to be considered a Top 50 candidate.

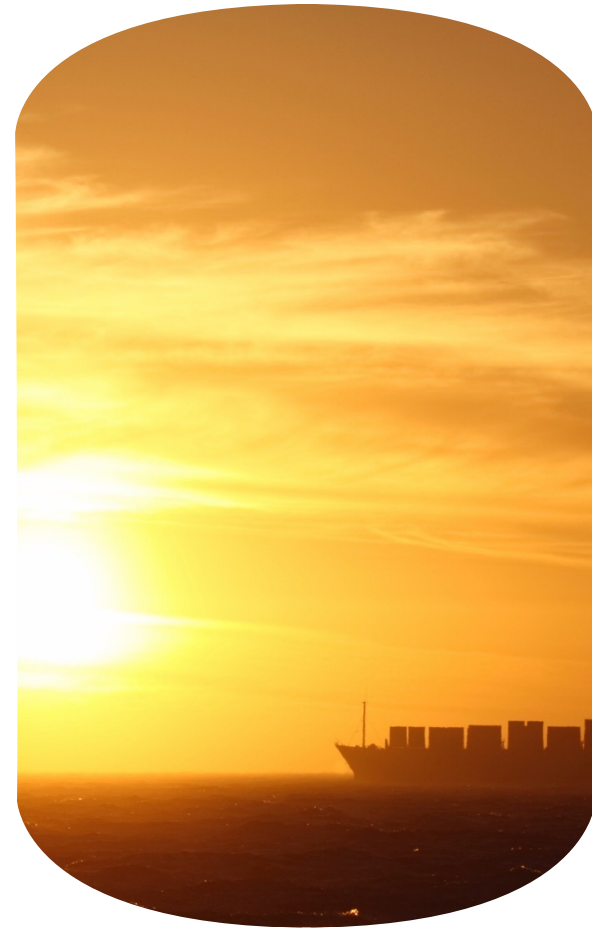
Other Statistics

- We separately offer current and historical timeline datasets on the congestion per port or region.
- We provide proforma vs. actual calls, as well as a rolling measure of capacity lost/ gained month-over-month or year-over-year.
- We measure proforma vs. actual berth stays.

CONTENTS

Schedule Reliability Scorecard (SRS)

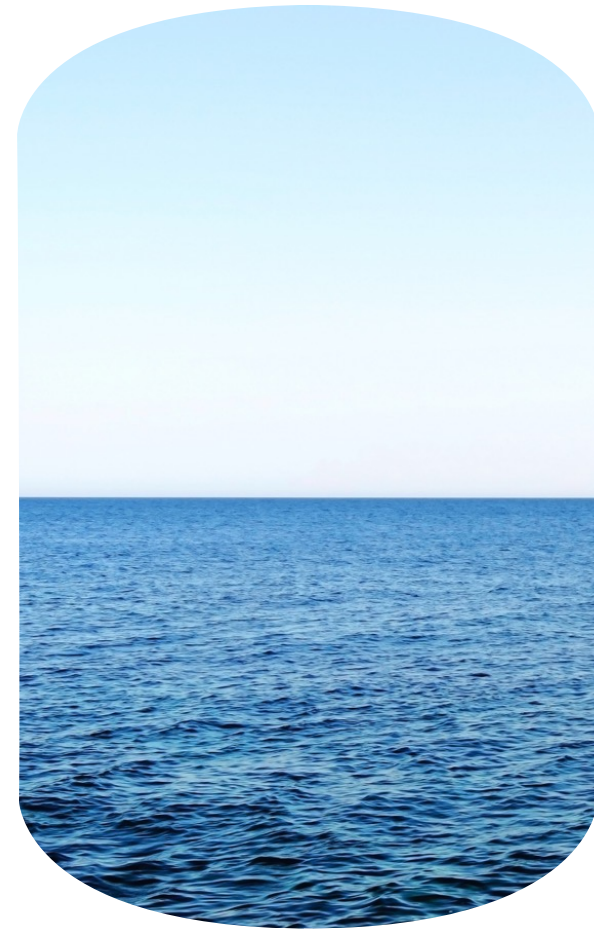
- Introduction – SRS – what is it (1 page)
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- 3. By Carrier (5 pages)
- 4. By Trade Lane (3 pages)
- 5. By Region & Port (13 pages)
- Next Steps (2 pages)
- Appendix: Methodology (6 pages)



NEXT STEPS

The good agenda

- “Direct port-pair schedule reliability”; measured at origin port, destination port and resulting transit time
- Terminal-level (including terminal operator) insights
- Berth stay duration insights – proforma vs actual windows
- Schedule Reliability closely relates to trade capacity. [Watch the webinar](#) on this topic
- Feel free to send us your input

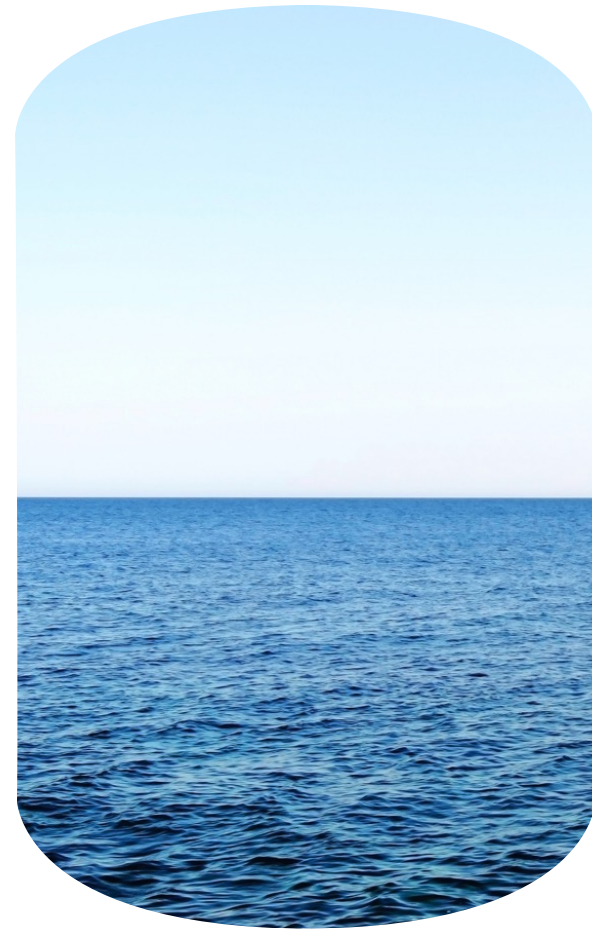


NEXT STEPS

The evil agenda

- In this Scorecard we provide high-level aggregate data and analysis
- If you're interested in understanding the granular details of your own company or port score, or that of your competitors;
- We can help you with the data – and how to implement and act on it

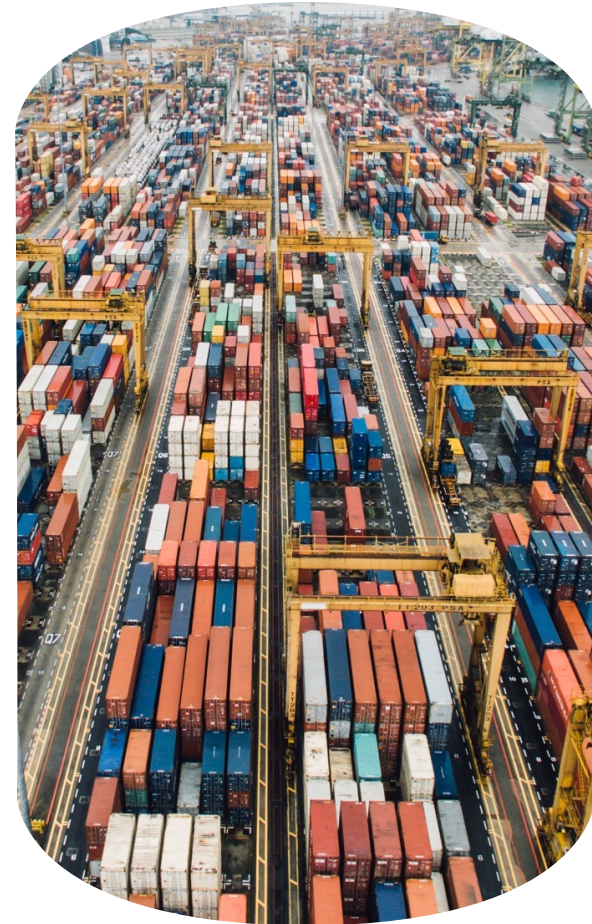
Please reach out to contact@eeSea.com



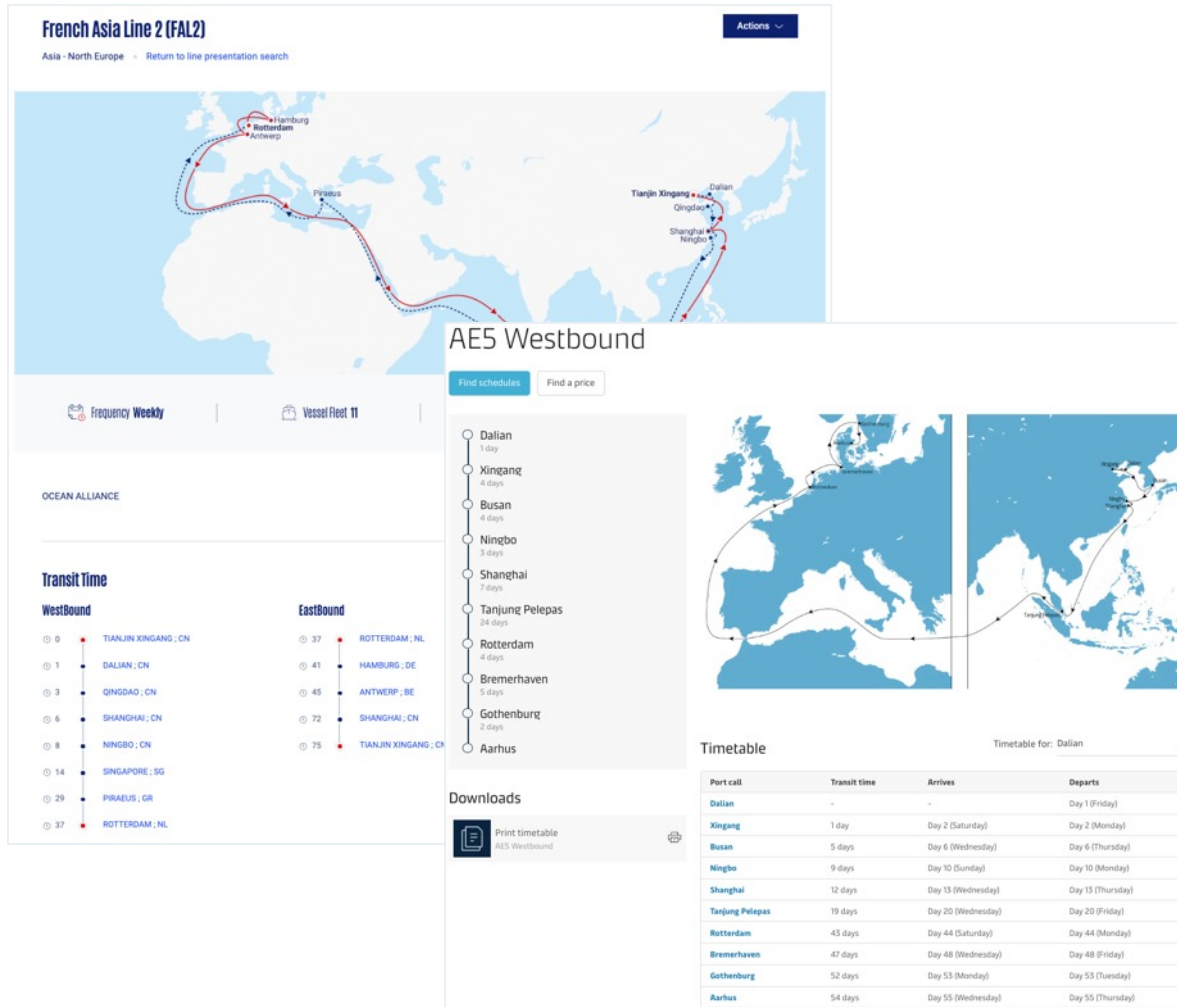
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Proforma service schedules



- Published by the carriers
- A.k.a. marketing flyers
- What the carrier has “sold”, we consider their commitment
- With a medium- to long-term perspective
- Communicated per liner service
- Structure – and quality – of carriers’ communication varies...
- VSA partners on the same service sometimes have conflicting versions of the “same” schedules. For these, the data is compared and combined into a single service proforma
- Service proformas → vessel proformas, through slot assignments

METHODOLOGY

"Locking" the base proforma schedules; when and how?

Locked by service marketing flyer

- The chosen approach
- Easy to understand and relate to
- No biased variables, i.e. whether to lock at T-60 or T-40, or differentiate by trade or region
- No carrier ability to pre-emptively notify of, and thereby "cancel", delays
- Ability to adjust vessel service and slots (i.e. proactive communication) and thereby "re-slot" and reset a vessel's delays
- Requires one "agreed" service proforma schedule as basis

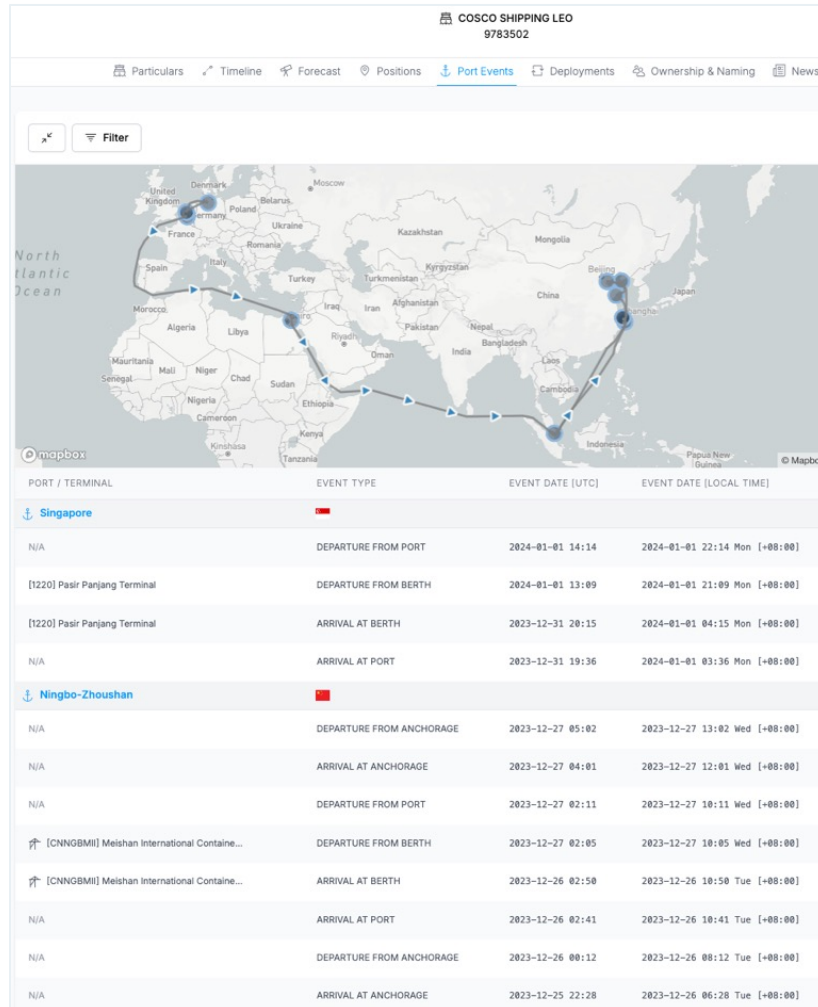
Locked by vessel @ T-60 days

- Locked to what the carriers published on T-60 (or another t-minus value)
- Results in the opposite of the above marketing bullets
- Requires one "agreed" vessel schedule to use as basis
- Often biased, as based on carriers' self-reporting



METHODOLOGY

Actual port events



- Event-based: port arrival, berth arrival, berth departure and port departure
- Primarily from un-biased, geo-fence-based AIS events
- Sometimes taken from the carriers' schedules, when AIS flawed or unavailable

METHODOLOGY

Actual vessel schedules...

Vessel - current name (ID + IMO)	Port - code	Port - name	Event - type	Terminal code - vessel	Event - status	Date - proforma	Date - actual	Date - forecast (current)	SR - delay (days)	Service - master name	Service - version number & slot	Vessel - historical operator - company code	Delay - days
COSCO SHIPPING LEO (8484 / 9783502)	DEHAM	Hamburg	3 - Berth arrival	DEHAMCTT	A - Actual	2023-11-02 - 23:00	2023-11-12 - 14:41	Null	-9.7	OCEAN - NEU2 CMA - FAL2 COSCO - AEU3..	v9-s10	COSCO	-9.7
			4 - Berth departure	DEHAMCTT	A - Actual	2023-11-05 - 11:00	2023-11-15 - 15:23	Null	-10.2	OCEAN - NEU2 CMA - FAL2 COSCO - AEU3..	v9-s10	COSCO	-10.2
	BEANR	Antwerp	3 - Berth arrival	BEANRGW	A - Actual	2023-11-06 - 18:00	2023-11-16 - 20:27	Null	-10.1	OCEAN - NEU2 CMA - FAL2 COSCO - AEU3..	v9-s10	COSCO	-10.1
			4 - Berth departure	BEANRGW	A - Actual	2023-11-08 - 06:00	2023-11-18 - 14:50	Null	-10.4	OCEAN - NEU2 CMA - FAL2 COSCO - AEU3..	v9-s10	COSCO	-10.4
	EGSZC	Suez Canal	2 - Port arrival		A - Actual	2023-11-17 - 21:45	2023-11-27 - 12:33	Null	-9.6	OCEAN - NEU2 CMA - FAL2 COSCO - AEU3..	v9-s10	COSCO	-9.6
			5 - Port departure		A - Actual	2023-11-18 - 18:15	2023-11-27 - 21:59	Null	-9.2	OCEAN - NEU2 CMA - FAL2 COSCO - AEU3..	v9-s10	COSCO	-9.2
	CNSHG	Shanghai	3 - Berth arrival	CNSHGYDP1	A - Actual	2023-12-05 - 08:00	2023-12-13 - 22:00	Null	-8.6	OCEAN - NEU2 CMA - FAL2 COSCO - AEU3..	v9-s10	COSCO	-8.6
			4 - Berth departure	CNSHGYDP1	A - Actual	2023-12-06 - 20:00	2023-12-15 - 08:06	Null	-8.5	OCEAN - NEU2 CMA - FAL2 COSCO - AEU3..	v9-s10	COSCO	-8.5
	CNTSN	Tianjin / Xingang	3 - Berth arrival		A - Actual	2023-12-15 - 12:00	2023-12-17 - 12:04	Null	-2.0	OCEAN - NEU2 CMA - FAL2 COSCO - AEU3..	v11-s11	COSCO	-2.0
			4 - Berth departure		A - Actual	2023-12-16 - 00:00	2023-12-18 - 09:19	Null	-2.4	OCEAN - NEU2 CMA - FAL2 COSCO - AEU3..	v11-s11	COSCO	-2.4
	CNDLC	Dalian	3 - Berth arrival	CNDLCDPCM	A - Actual	2023-12-17 - 12:00	2023-12-18 - 23:27	Null	-1.5	OCEAN - NEU2 CMA - FAL2 COSCO - AEU3..	v11-s11	COSCO	-1.5
			4 - Berth departure	CNDLCDPCM	A - Actual	2023-12-18 - 00:00	2023-12-21 - 01:03	Null	-3.0	OCEAN - NEU2 CMA - FAL2 COSCO - AEU3..	v11-s11	COSCO	-3.0
	CNQDG	Qingdao	3 - Berth arrival	CNQDGGQCTU	A - Actual	2023-12-19 - 18:00	2023-12-22 - 03:50	Null	-2.4	OCEAN - NEU2 CMA - FAL2 COSCO - AEU3..	v11-s11	COSCO	-2.4
			4 - Berth departure	CNQDGGQCTU	A - Actual	2023-12-20 - 02:00	2023-12-23 - 12:29	Null	-3.4	OCEAN - NEU2 CMA - FAL2 COSCO - AEU3..	v11-s11	COSCO	-3.4
	CNSHG	Shanghai	3 - Berth arrival	CNSHGYDP1	A - Actual	2023-12-21 - 13:00	2023-12-24 - 15:23	Null	-3.1	OCEAN - NEU2 CMA - FAL2 COSCO - AEU3..	v11-s11	COSCO	-3.1
			4 - Berth departure	CNSHGYDP1	A - Actual	2023-12-22 - 13:00	2023-12-26 - 00:02	Null	-3.5	OCEAN - NEU2 CMA - FAL2 COSCO - AEU3..	v11-s11	COSCO	-3.5
	CNNGB	Ningbo-Zh.	3 - Berth arrival	CNNGBMII	A - Actual	2023-12-23 - 09:00	2023-12-26 - 10:50	Null	-3.1	OCEAN - NEU2 CMA - FAL2 COSCO - AEU3..	v11-s11	COSCO	-3.1
			4 - Berth departure	CNNGBMII	A - Actual	2023-12-24 - 10:00	2023-12-27 - 10:05	Null	-3.0	OCEAN - NEU2 CMA - FAL2 COSCO - AEU3..	v11-s11	COSCO	-3.0
	SGSIN	Singapore	3 - Berth arrival		A - Actual	2023-12-29 - 14:00	2024-01-01 - 04:15	Null	-2.6	OCEAN - NEU2 CMA - FAL2 COSCO - AEU3..	v11-s11	COSCO	-2.6
			4 - Berth departure		A - Actual	2023-12-30 - 22:00	2024-01-01 - 21:09	Null	-2.0	OCEAN - NEU2 CMA - FAL2 COSCO - AEU3..	v11-s11	COSCO	-2.0
	EGSZC	Suez Canal	2 - Port arrival		O - Omission	2024-01-09 - 21:45	Null	Null	Null	OCEAN - NEU2 CMA - FAL2 COSCO - AEU3..	v11-s11	COSCO	
			5 - Port departure		O - Omission	2024-01-10 - 17:15	Null	Null	Null	OCEAN - NEU2 CMA - FAL2 COSCO - AEU3..	v11-s11	COSCO	
	GRPIR	Piraeus	3 - Berth arrival		O - Omission	2024-01-13 - 07:00	Null	Null	Null	OCEAN - NEU2 CMA - FAL2 COSCO - AEU3..	v11-s11	COSCO	
			4 - Berth departure		O - Omission	2024-01-14 - 15:00	Null	Null	Null	OCEAN - NEU2 CMA - FAL2 COSCO - AEU3..	v11-s11	COSCO	
	ZACGH	Cape of Good Hope	2 - Port arrival		I - Inducement	Null	2024-01-14 - 20:02	Null	Null	Null	Null	COSCO	
			5 - Port departure		I - Inducement	Null	2024-01-14 - 20:22	Null	Null	Null	Null	COSCO	
	NLRMT	Rotterdam	3 - Berth arrival	NLRMTCTE	B - Forecast	2024-01-22 - 08:00	Null	2024-02-02 - 19:00	-11.5	OCEAN - NEU2 CMA - FAL2 COSCO - AEU3..	v11-s11	COSCO	
			4 - Berth departure	NLRMTCTE	B - Forecast	2024-01-23 - 22:00	Null	2024-02-05 - 11:00	-12.5	OCEAN - NEU2 CMA - FAL2 COSCO - AEU3..	v11-s11	COSCO	
	DEHAM	Hamburg	3 - Berth arrival	DEHAMCTT	B - Forecast	2024-01-25 - 23:00	Null	2024-02-06 - 11:30	-11.5	OCEAN - NEU2 CMA - FAL2 COSCO - AEU3..	v11-s11	COSCO	
			4 - Berth departure	DEHAMCTT	B - Forecast	2024-01-27 - 11:00	Null	2024-02-08 - 23:30	-12.5	OCEAN - NEU2 CMA - FAL2 COSCO - AEU3..	v11-s11	COSCO	
	BEANR	Antwerp	3 - Berth arrival	BEANRGW	B - Forecast	2024-01-29 - 18:00	Null	2024-02-10 - 10:00	-11.7	OCEAN - NEU2 CMA - FAL2 COSCO - AEU3..	v11-s11	COSCO	
			4 - Berth departure	BEANRGW	B - Forecast	2024-01-30 - 06:00	Null	2024-02-11 - 22:00	-12.7	OCEAN - NEU2 CMA - FAL2 COSCO - AEU3..	v11-s11	COSCO	
	EGSZC	Suez Canal	2 - Port arrival		O - Omission	2024-02-06 - 21:45	Null	Null	Null	OCEAN - NEU2 CMA - FAL2 COSCO - AEU3..	v11-s11	COSCO	
			5 - Port departure		O - Omission	2024-02-07 - 18:15	Null	Null	Null	OCEAN - NEU2 CMA - FAL2 COSCO - AEU3..	v11-s11	COSCO	
	CNSHG	Shanghai	3 - Berth arrival	CNSHGYDP1	B - Forecast	2024-02-24 - 08:00	Null	2024-03-12 - 02:00	-16.8	OCEAN - NEU2 CMA - FAL2 COSCO - AEU3..	v11-s11	COSCO	
			4 - Berth departure	CNSHGYDP1	B - Forecast	2024-02-25 - 20:00	Null	2024-03-13 - 20:00	-17.0	OCEAN - NEU2 CMA - FAL2 COSCO - AEU3..	v11-s11	COSCO	
Grand Total													-5.4

METHODOLOGY

...leads to schedule reliability; through several lenses

Our primary measurement is the average delay in days

- Proforma vs actual time of the vessel event
- For example: 5h45m = 5.75 hrs = 0.24 days late
- A delayed vessel is expressed with a negative number.
- A positive number indicates an early arrival

Our secondary measurement is the on-time percentage

- We mark < 12 hrs delay as an on-time arrival
- This variable can be adjusted to fit your use case in our data
- A port event < 12 hrs late gets 100%, > 12 hrs late gets 0%. The aggregate percentage of vessels on-time is used throughout
- It's possible for average delay and on-time percentage to diverge; few, but extremely delayed vessels vs a more stable, but higher, average delay. Either may be relevant in different situations

All can then be aggregated and analysed through several lenses

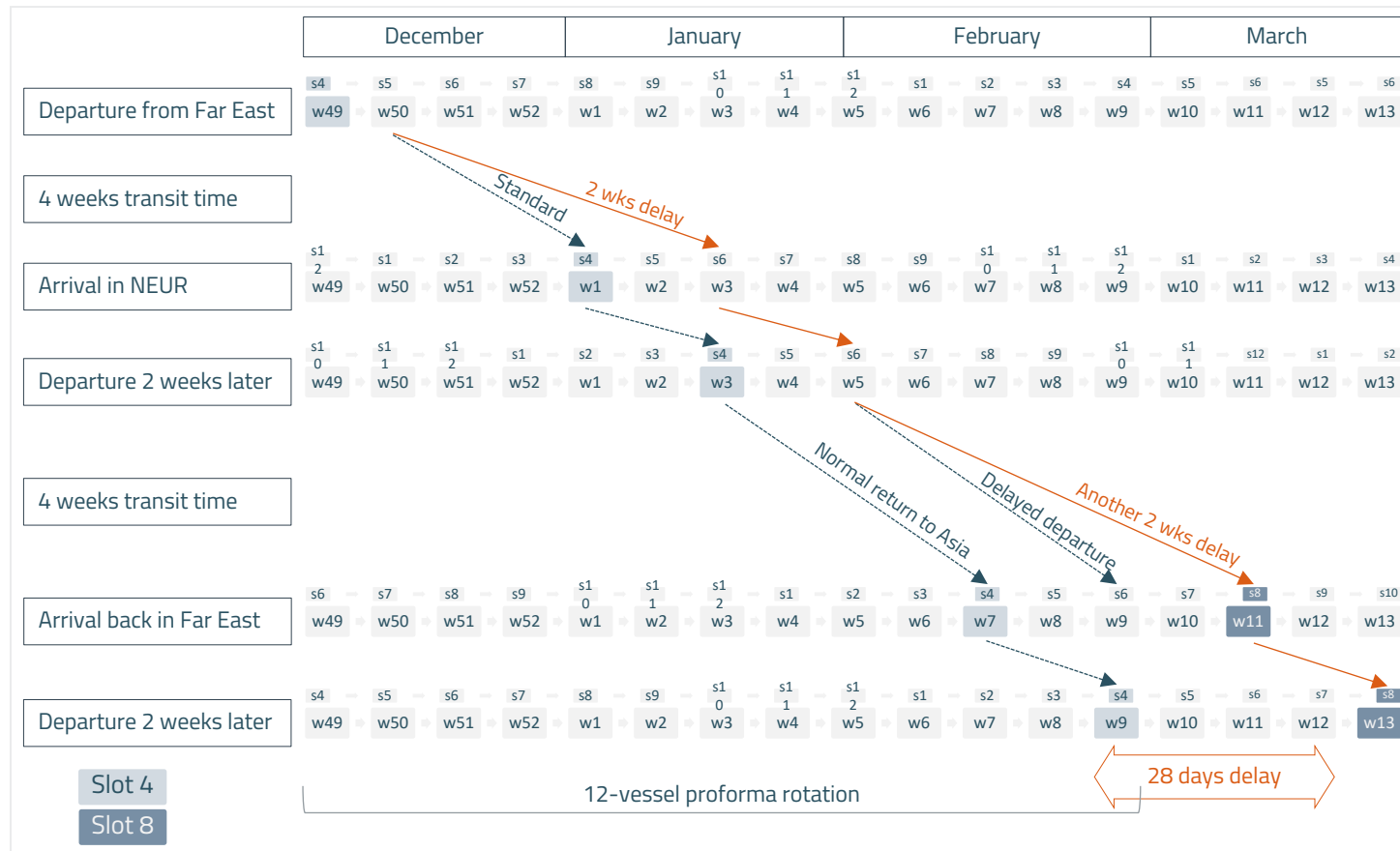
- Trade lane – last load & first discharge
- Service & alliance
- Port, country, region
- Vessel operating carrier
- VSA partner
- Berth/ port arrival/ departure → stay duration
- Terminal, terminal operator

And always – Each visualization is accompanied by an explanation of measures and filters used.

METHODOLOGY

The capacity waterfall – resetting schedule delays

What effectively happens – 12-vessel FEA-NEUR loop, round-trip of 84 days, weekly frequency and 12 “slots”



4 of 12 sailings in a quarter are lost = 16 per year = 30% of capacity

Vessel A

- Departs last load port FEA in w49 / slot 4
- Arrives first discharge port in NEUR in w3, 14 days late, but remains in slot 4
- Rotates around NEUR, still two weeks late upon departure last load port in w5
- Catches a further 2-week delay into first discharge port ASI, remains allocated to slot 4
- **Rotates around ASI, maintains four-week compounded delay**
- Arrives at last load port in w13, now effectively in slot 8 (but officially 4 weeks delayed from slot 4)
- Assuming vessels in slots 5, 6 and 7 are equally delayed → weeks 4, 5, 6 and 7 have effectively been lost as departure sailings from Asia
- **Vessel A will be re-allocated to slot 8. She is now “reset” and back on schedule**
- Lost sailings out of Asia will be registered in weeks 4, 5, 6 and 7
- **The original vessel in slot 8 will be pushed to slot 9, and so on**



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Vessel schedules & ETAs.

Reach out
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