



SCHENKER

aragón
exterior

Jueves, 27 de mayo, 10-11h

Webinar AREX Network

Situación actual de la logística con China

Transporte marítimo y
alternativas

Ponente: Jesús Cuellar
Head of Air and Ocean Sales
Iberia de DB SCHENKER

Entidad colaboradora:

iberCaja



EEUU 4328720

- 1. Acerca de DB Schenker**
- 2. Conexiones de España con China**
- 3. Situación del mercado de transporte marítimo**
- 4. Los otros modos de transporte alternativos: Aéreo, Marítimo/Aéreo, Tren y Carretera.**
- 5. Comparativa modos de transporte - Coste vs tiempo de tránsito**

Acerca de DB Schenker

La logística es un factor estratégico clave del éxito y nuestro negocio principal. Creciendo firmemente.

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Contract Logistics



Transporte Aéreo



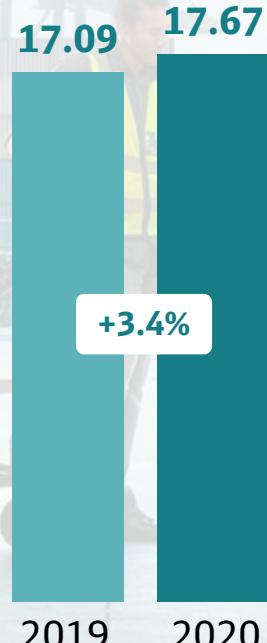
Transporte Marítimo



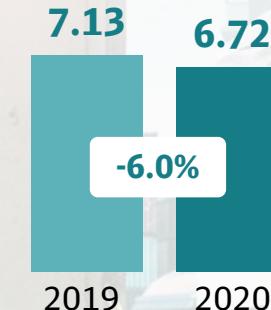
Transporte Terrestre



Total¹



Tte. Terrestre^{1,2}



Tte. Aéreo¹



Tte. Marítimo¹ (incl. Projects)



Contract Logistics¹



¹ Facturación en bn EUR

² Europa

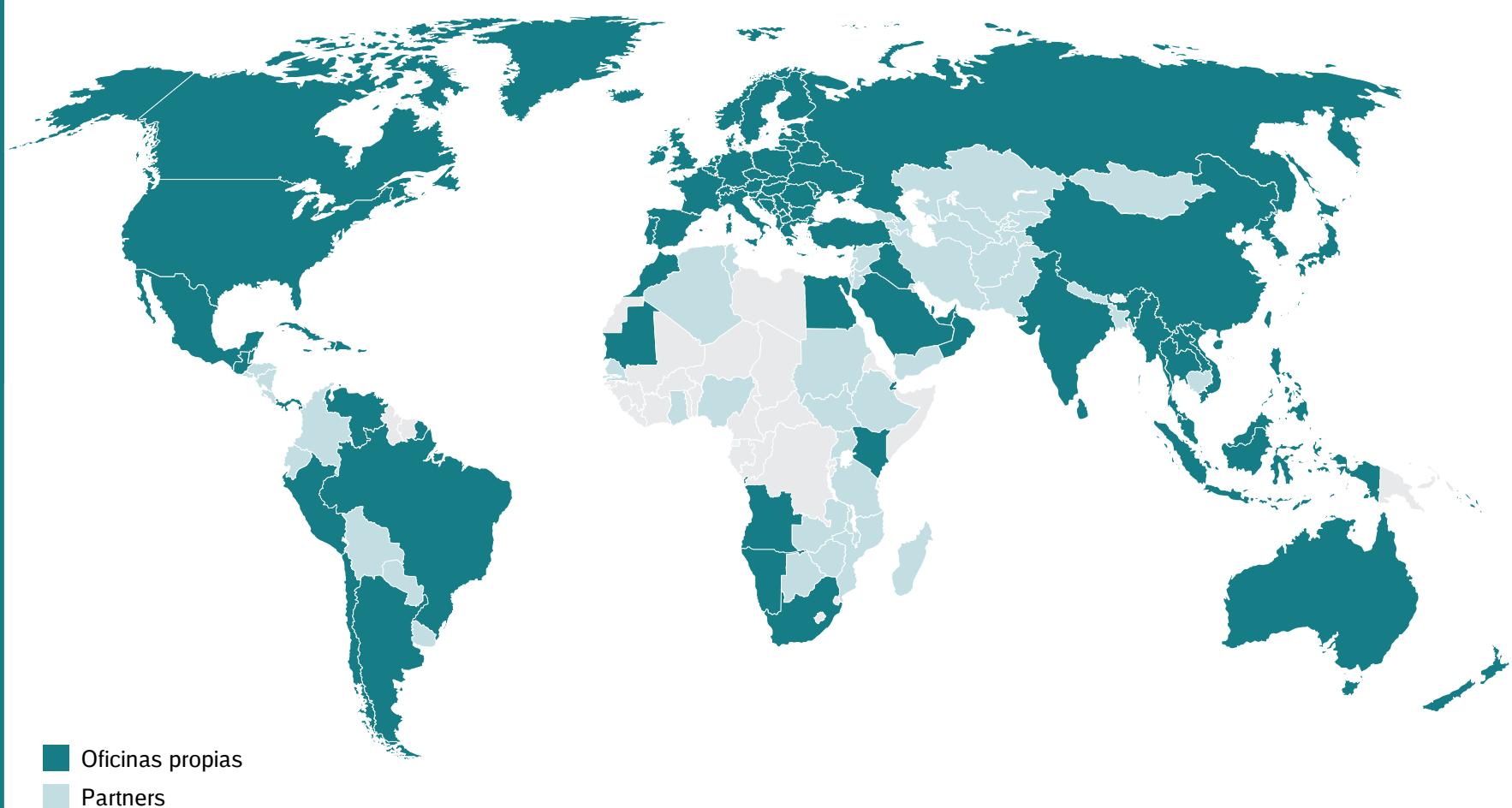
Conectamos el mundo

con nuestra red global de expertos en logística.



Red global

Más de **76.000** expertos en logística para darle soporte global en nuestras **2.000 oficinas**.



Oficinas propias

Partners

DB Schenker in Greater China at a glance



6,060 logistics specialists

Office locations in **66** cities

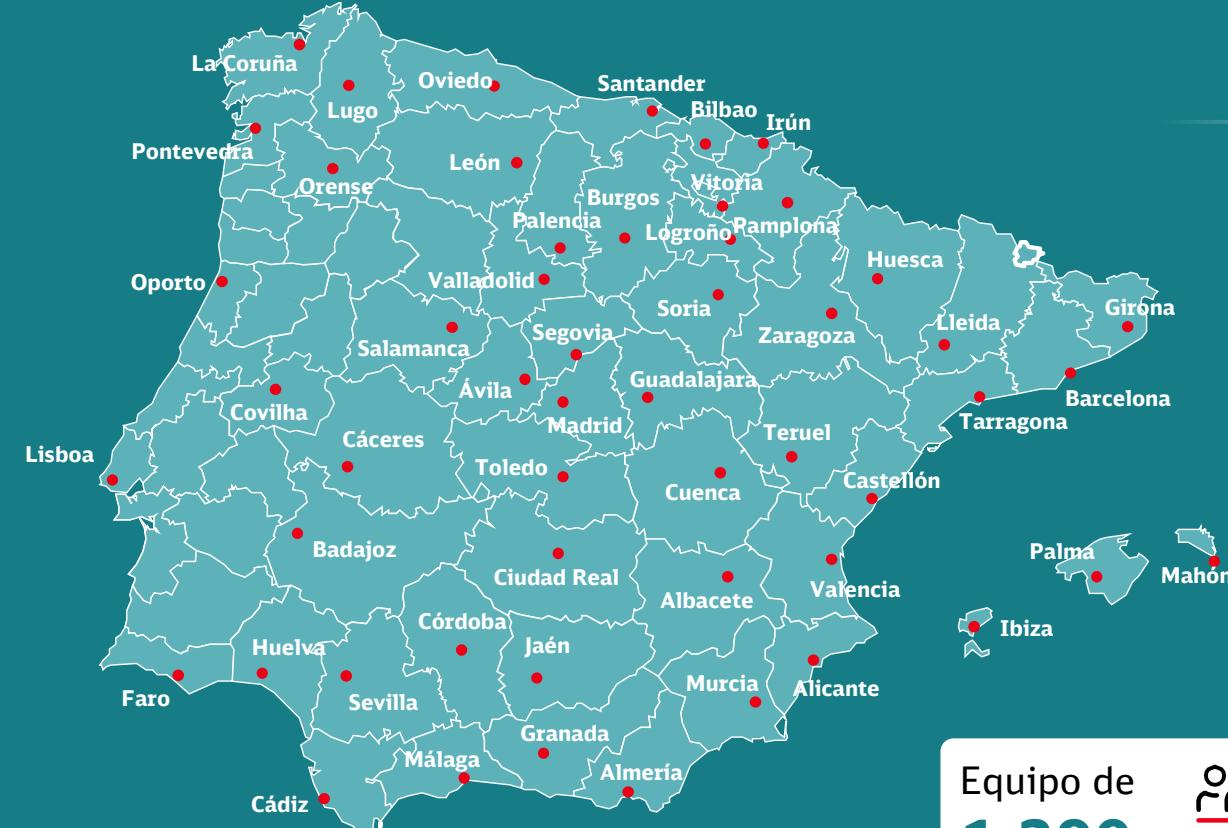
95 warehouses and
933,000 m² of WH
space*

*Including air and ocean freight facilities



Acerca de DB Schenker Iberia

Iberia en cifras - Delegaciones en España y Portugal



DB Schenker Iberia

Equipo de
1.290
especialistas



Más de
75 delegaciones



Más de
130.000 m²
de almacenes y
plataformas



Delegaciones en España y Portugal

DB Schenker dispone de delegaciones repartidas por la Península Ibérica, Baleares, Canarias, Ceuta y Melilla, desde donde ofrecemos servicios de Transporte Terrestre, Aéreo y Marítimo.

DB Schenker Zaragoza

Gateway Zaragoza

Marítimo, aéreo y
Terrestre nacional e
internacional.

Operaciones micro
logística

4.000 m² Cross Docking

25 muelles long distance

16 Rutas directas en
doméstico y 7
internacionales



**C/ Lerici, 20
Plataforma
Logística Plaza
50197 Zaragoza**

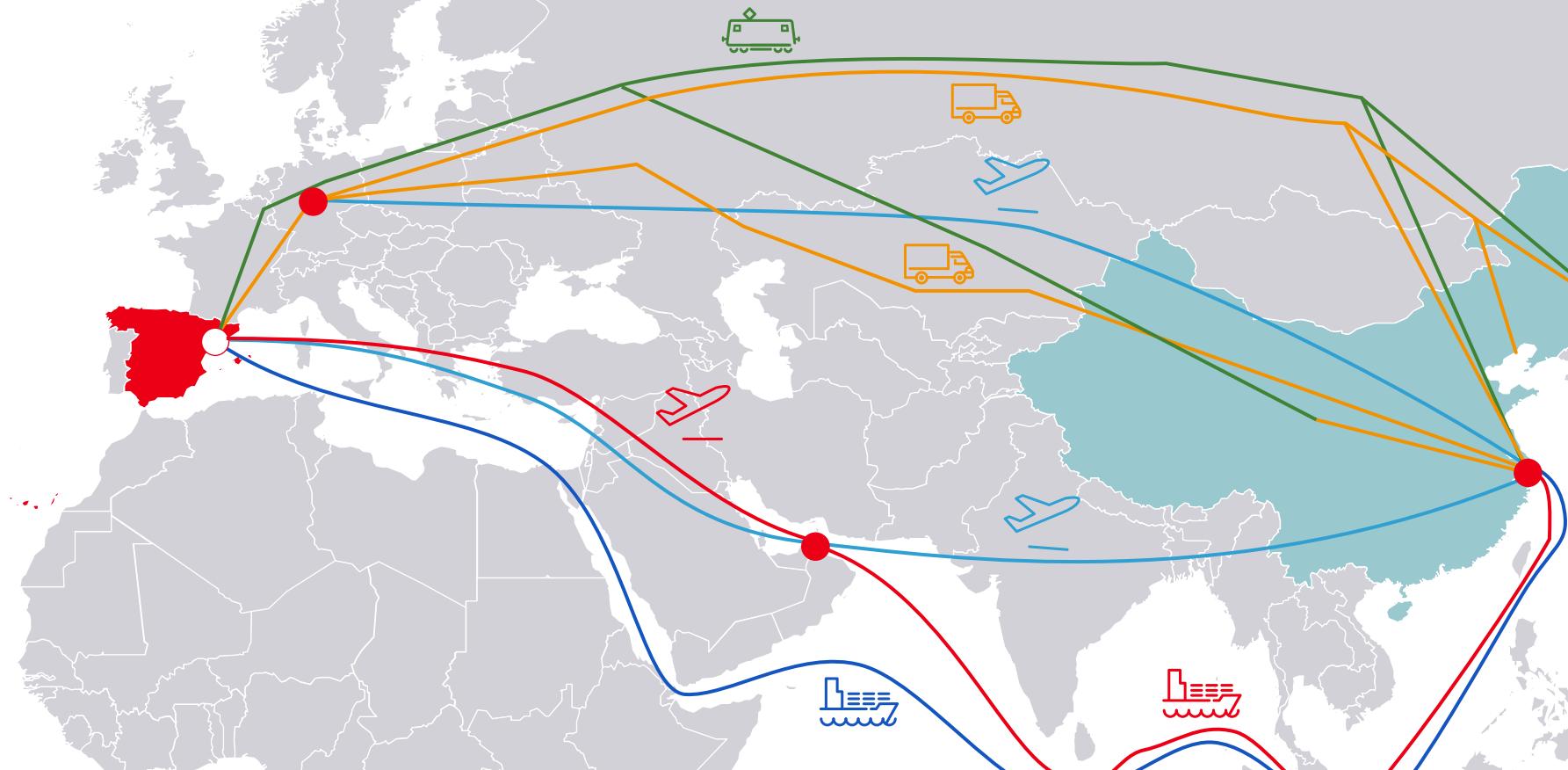


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Conexiones España - China

Esquema de distintos modos y rutas de transporte

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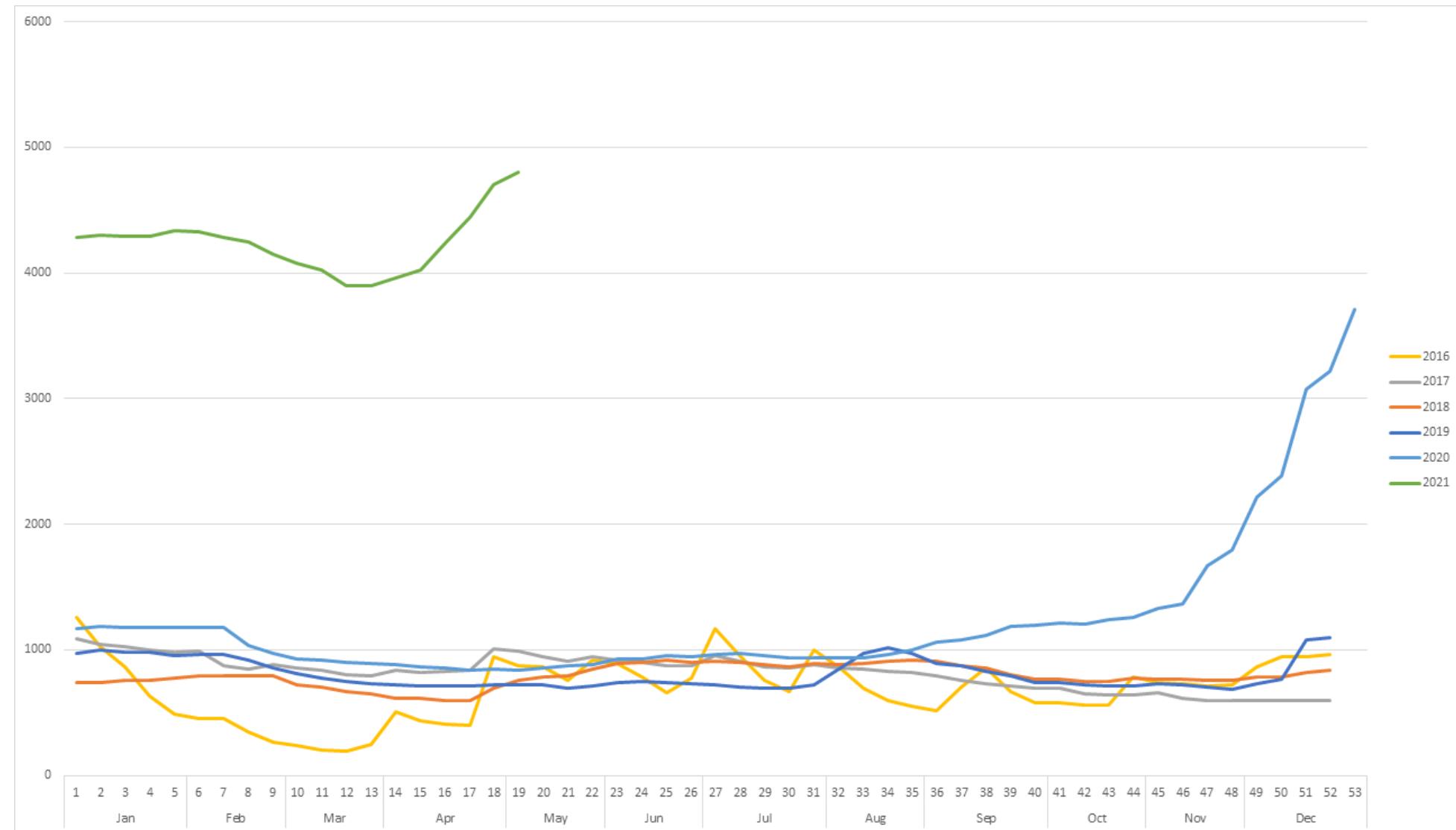
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Marítimo

El modo de transporte más utilizado en el comercio internacional.

Ocean freight rate index SCFI

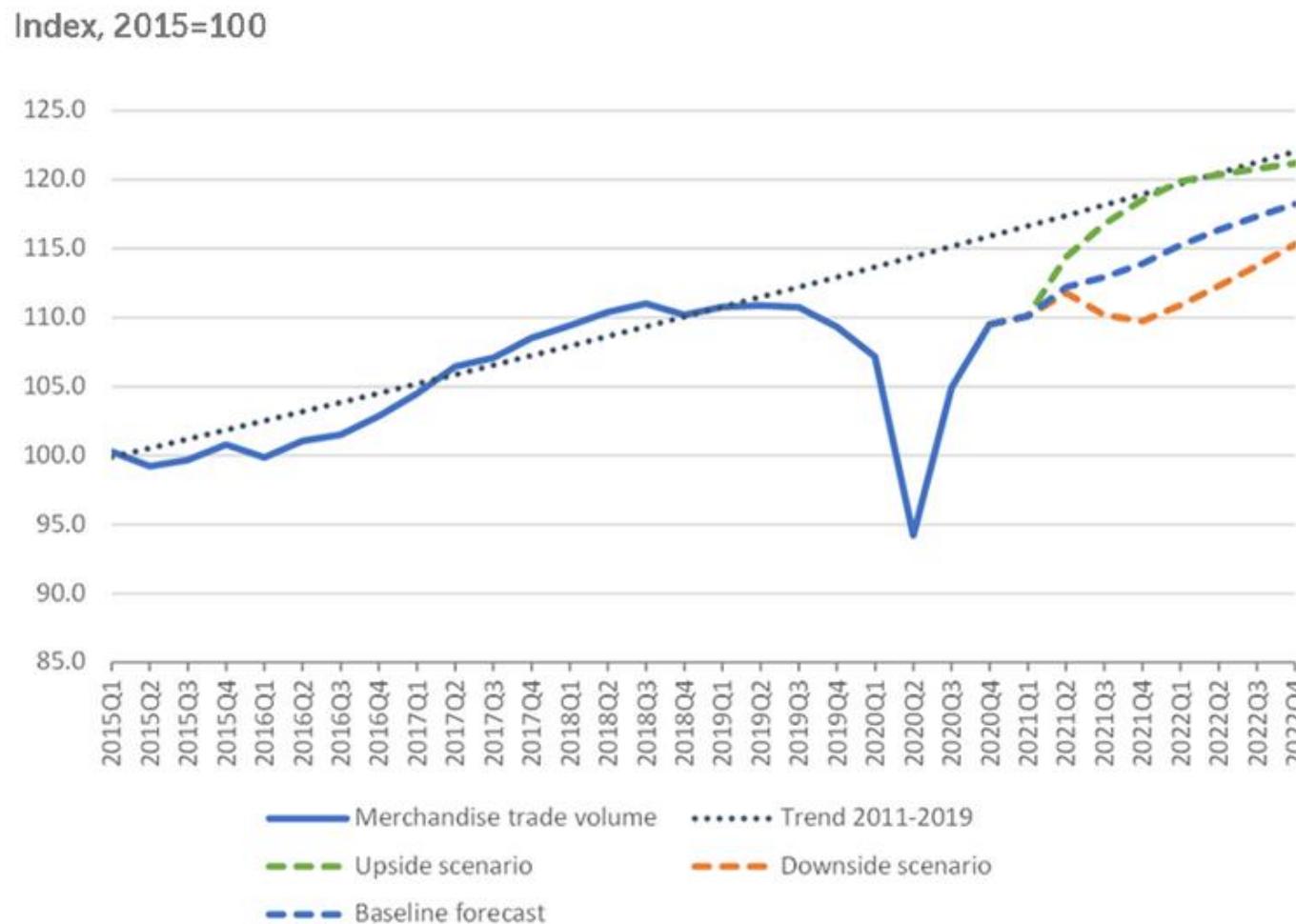
Shanghai to Mediterranean – Weekly rate per TEU



WTO: World merchandise trade volume

2015Q1-2022Q4

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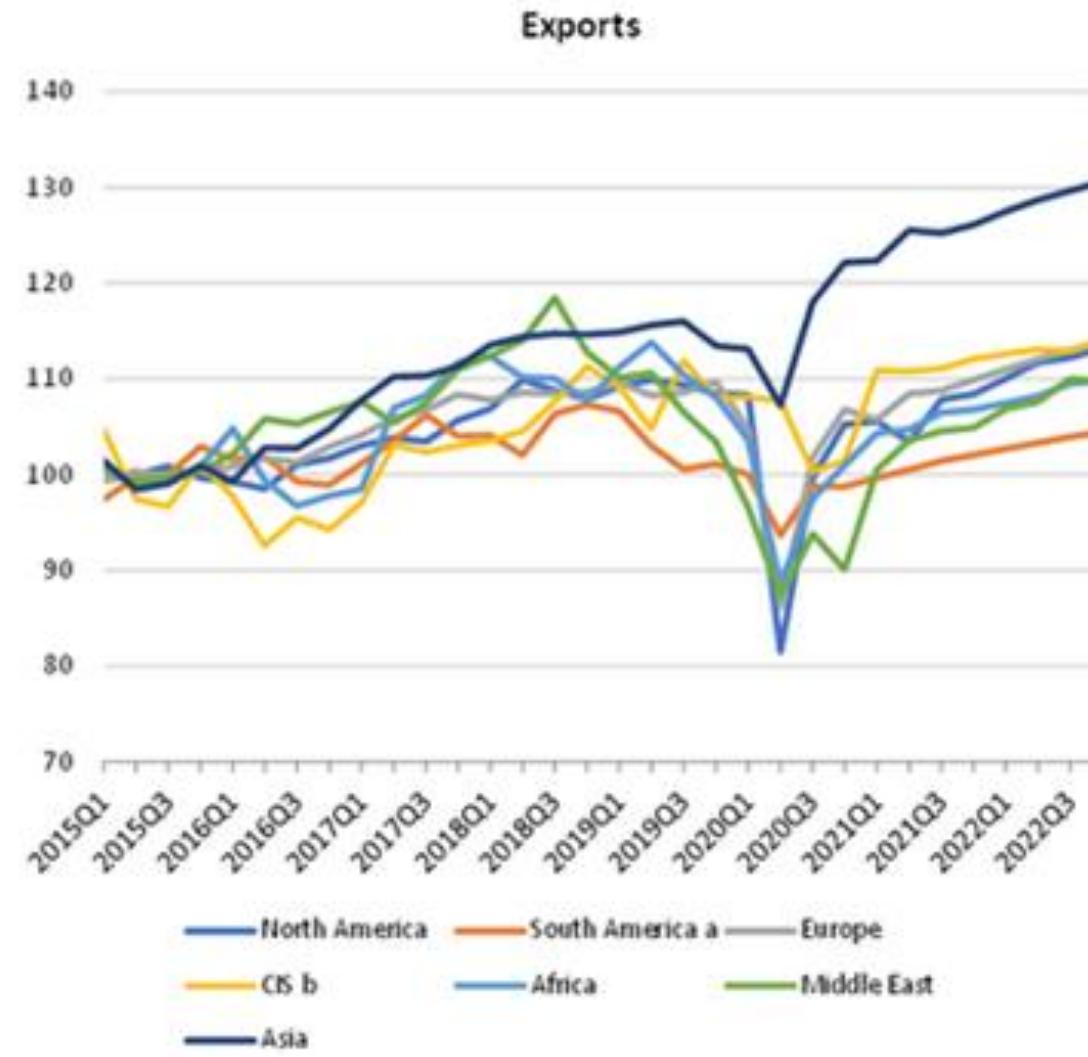
Sources: WTO and UNCTAD for trade volume data; WTO for forecasts.

WTO: Merchandise exports by region.

2015Q1- 2022Q4

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Volume index, 2015=100



Rollover ratios by shipping lines have reached up to 52% in Jan 2021

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Aug 2020 – Jan 2021

Line	August	September	Change
MSC	18.2 %	16.2 %	-2.0 %
Maersk	37.5 %	32.9 %	-4.6 %
Hapag-Lloyd	38.4 %	34.2 %	-4.2 %
CMA CGM	45.8 %	40.6 %	-5.2 %
COSCO	30.1 %	23.7 %	-6.4 %
Evergreen	28.4 %	25.9 %	-2.5 %
ONE	35.8 %	38.9 %	+3.1 %

Line	November	December	Change
CMA CGM	48 %	51 %	+3 %
COSCO	37 %	43 %	+6 %
Evergreen	37 %	44 %	+7 %
Hamburg Sud	30 %	29 %	-1 %
Hapag-Lloyd	42 %	46 %	+4 %
Maersk	32 %	32 %	0 %
MSC	29 %	29 %	0 %
ONE	45 %	50 %	+5 %

Line	January 2020	January 2021	Change
CMA CGM	45 %	52 %	+7 %
COSCO	33 %	39 %	+6 %
Evergreen	34 %	50 %	+6 %
Hamburg Sud	25 %	30 %	+5 %
Hapag-Lloyd	42 %	50 %	+8 %
Maersk	24 %	38 %	+14 %
MSC	25 %	29 %	+4 %
ONE	38 %	48 %	+10 %

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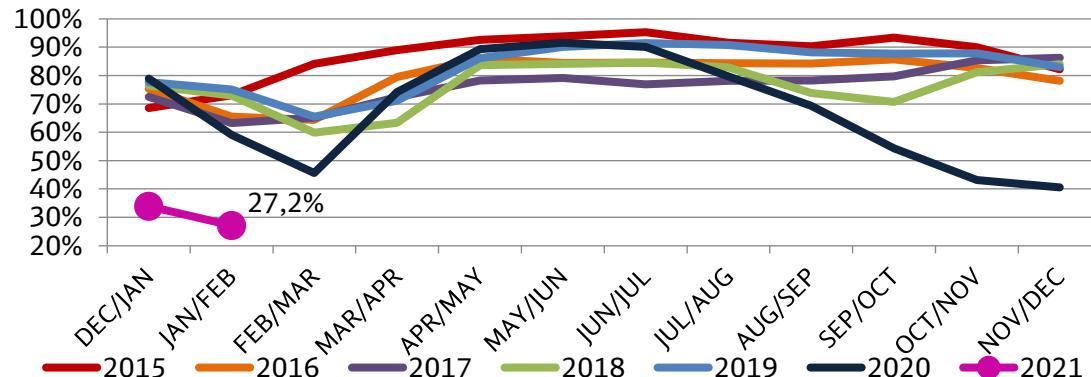
© Ocean Insights GmbH

Source: Ocean Insights GmbH

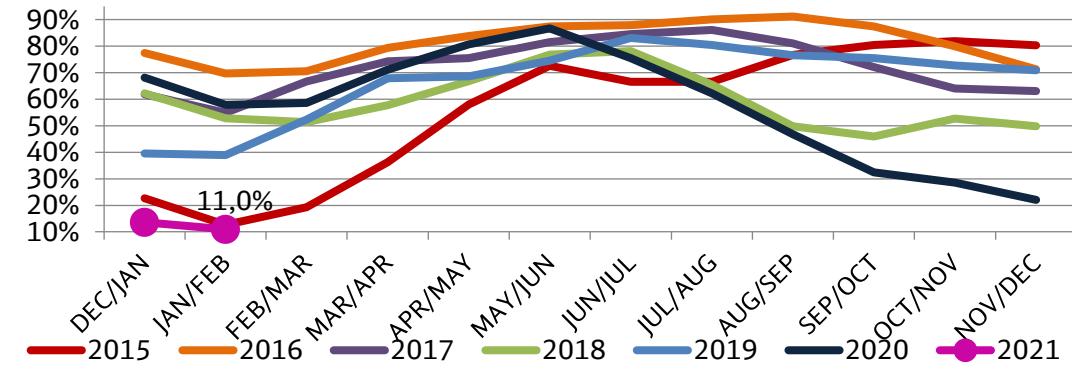
Schedule Reliability at a global average of 35% in Feb 2021



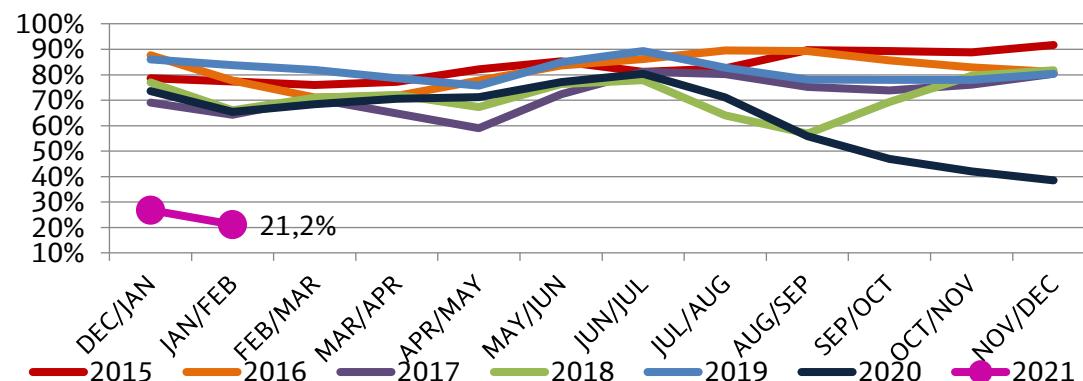
Asia - North Europe



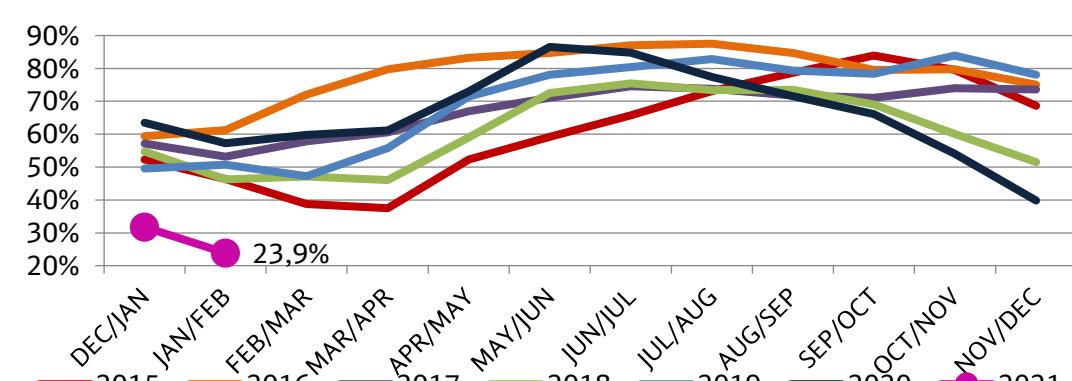
Asia - NAWC



Europe - Asia



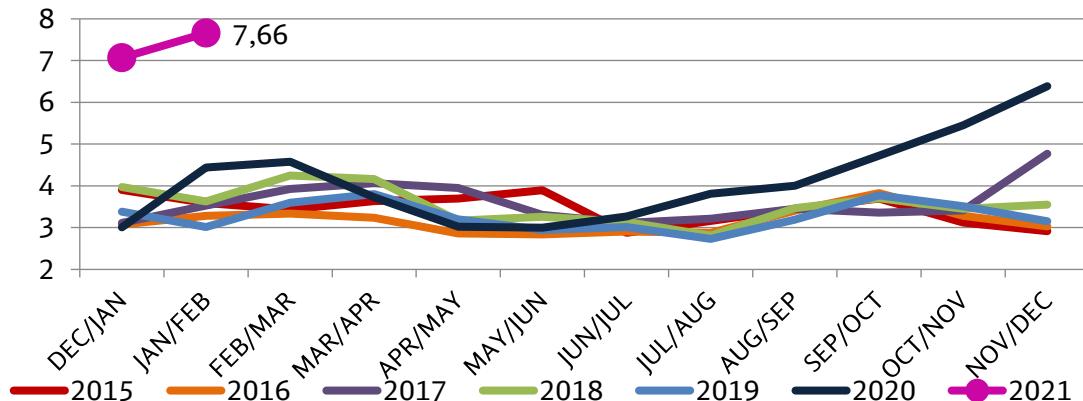
Transatlantic WB



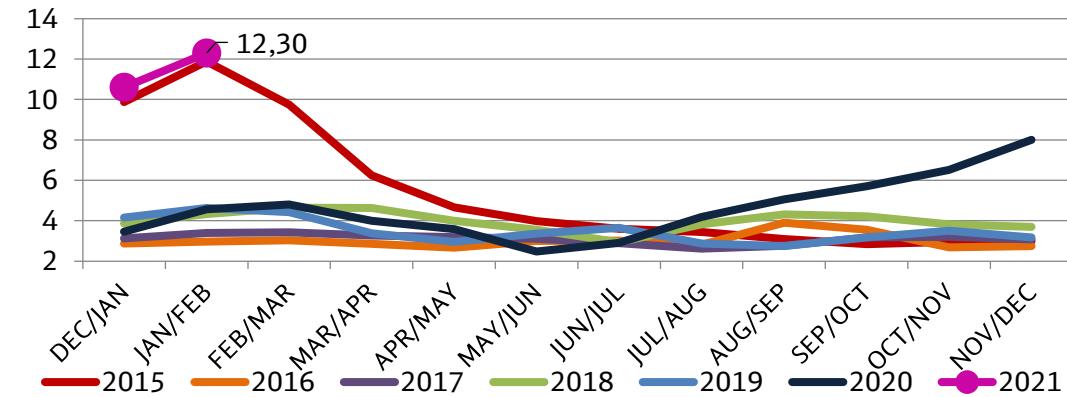
Source: SeaIntel

Average delay for late vessels at a global average of 7 days in Feb 2021

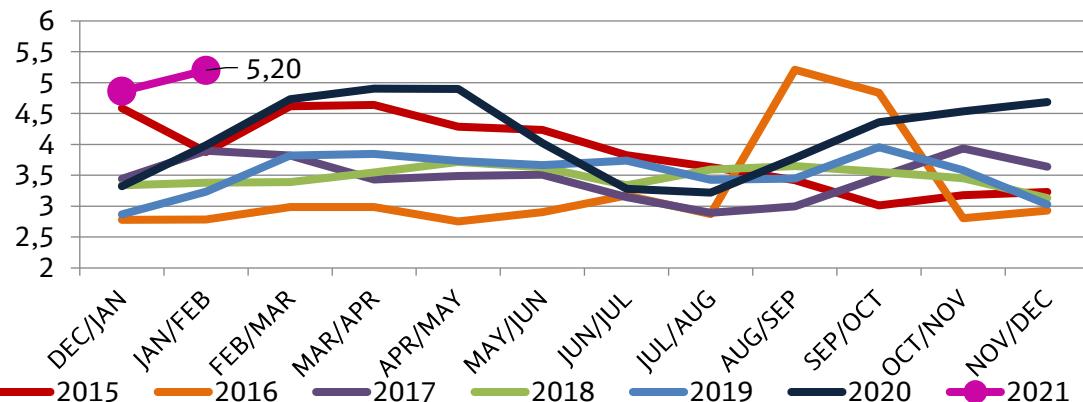
Asia - North Europe



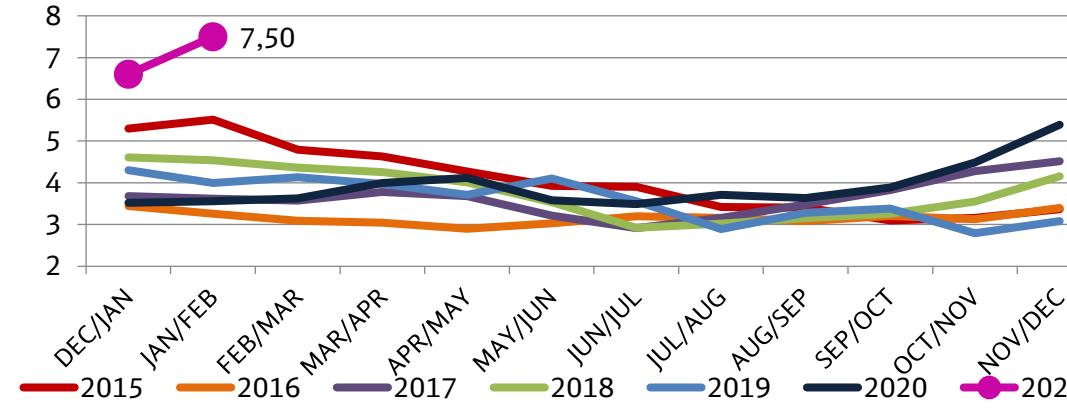
Asia - NAWC



Europe - Asia



Transatlantic WB



Source: SeaIntel

The blockage is over, but the operational problems are just starting

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Suez canal blockage cause a huge vessel impact



After the canal was blocked for one week, it took another week for the waiting ships to pass through the canal and move on their voyages causing an **average delay of 1.5 weeks for all vessels**.

The scheduled vessels on the trade lanes transiting the Suez Canal **southbound**, did not arrive on time back in APAC and as a result **cannot start their departures ex APAC on time (impact end of April)**

Vessels that had to cross the canal **northbound** are currently arriving late in European ports (impact beginning of April). This leads to

- **port congestions in the European ports** (impact Mid of April) and
- to **delayed departures towards Asia**, so that the **next departures cannot be met on time (impact end of May/beginning of June)**.

Both effects (north- and southbound) will result in **blanked sailings of many ex APAC departures at the end of April and again at the end of May/beginning of June**. Total impact approx. 30-40% capacity reduction in April/May. All of this is further subject to schedule changes.

The blockage is over, but the operational problems are just starting and likely to be felt for months



After ports manage to clear demand backlogs...

Ports around the globe brace for massive post-Suez cargo logjams

THE LOAD STAR
MAKING SENSE OF THE SUPPLY CHAIN



By Gavin van Marle 13/04/2021

"The largest ports are expected to bear the brunt of a **short-term surge in ship calls** as carriers try to get services back on schedule"

"With this potentially unprecedented build-up of cargo at box terminals around the world, insurers have warned it is likely to affect the entire container supply chain and increase the risk of freight crime – particularly theft."

...containers may still not be where they need to be

Suez Canal Blockage Pressures Global Container Supply

By Stella Yifan Xie and Joanne Chiu
Updated March 29, 2021 9:15 pm ET

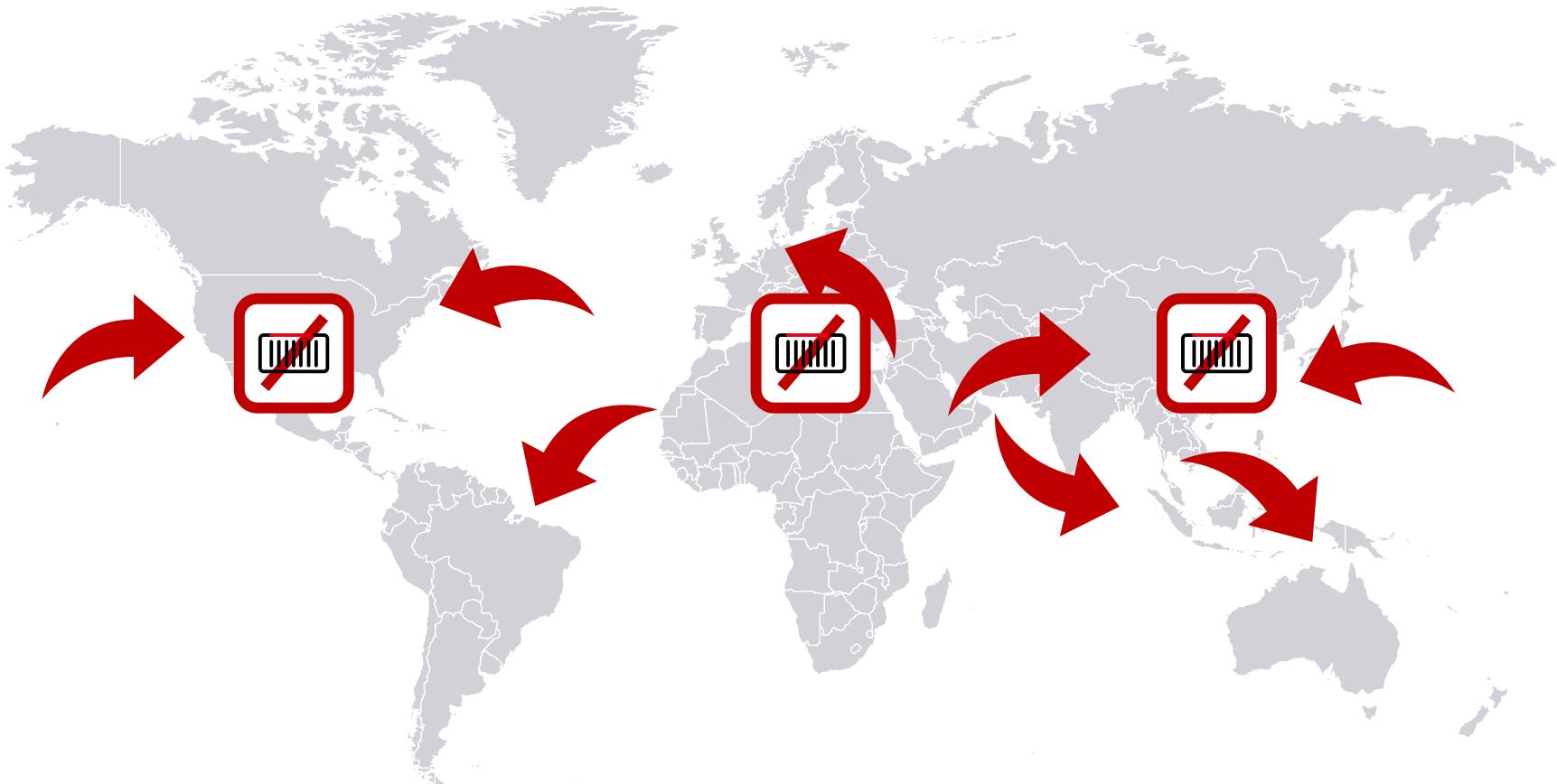
WSJ
BUSINESS



"The blockage of the Suez Canal exposed another weak link in already-strained global supply chains: a **shortage of shipping containers.**"

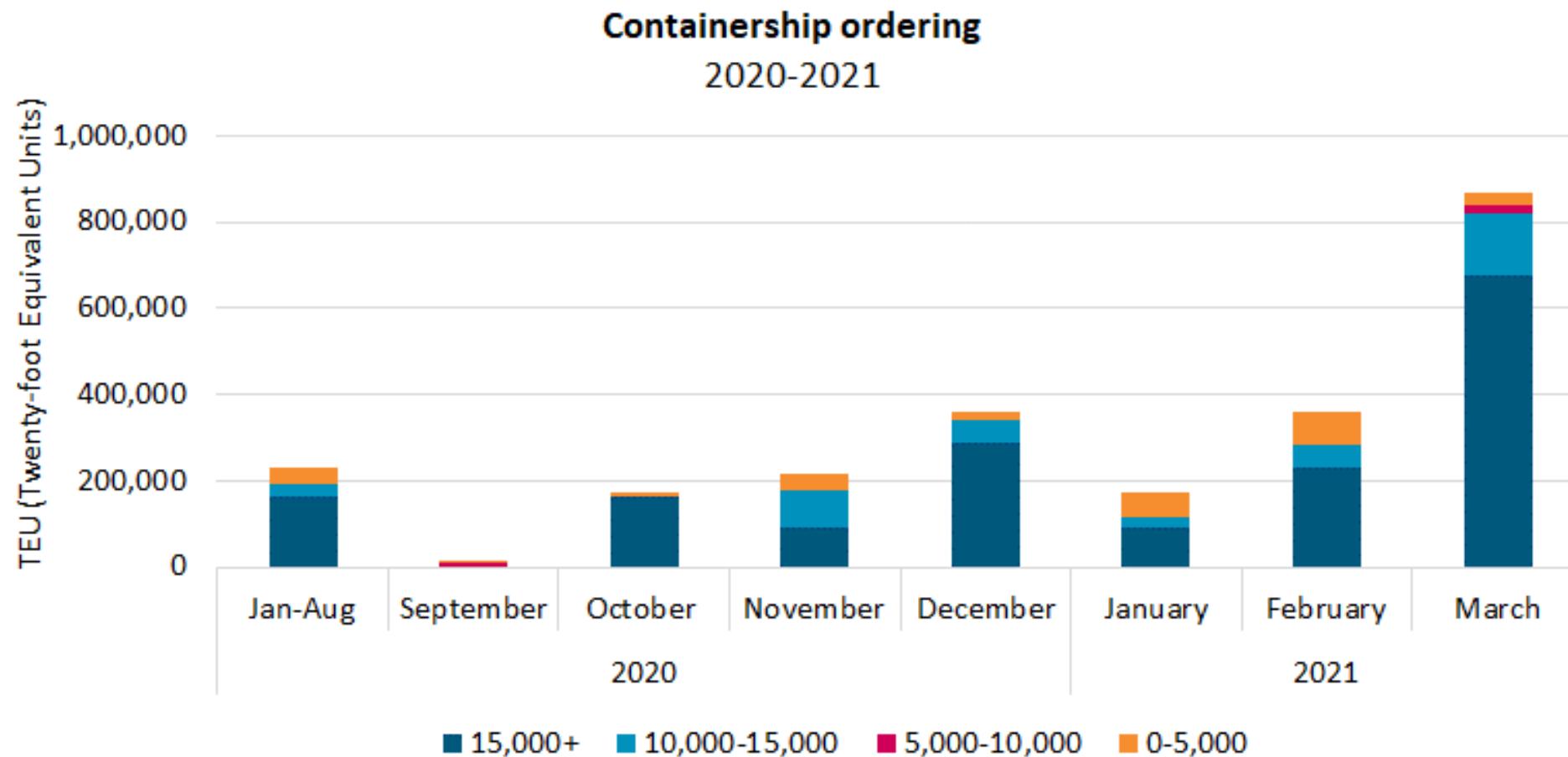
"The main impact [...] would be the delay in the return of ships and **boxes coming back [to Asia] from Europe**, and the effects could be felt in the coming two months," said Hua Joo Tan, an analyst at Liner Research Services in Singapore.

The blockage is over, but the operational problems are just starting



The blockage of the Suez Canal has not only an impact on the availability of vessels on the affected trade lanes, but also on the availability of containers globally

In March new orders for 45 ultra-large containerships and additional 27 smaller ships



Source: BIMCO, Clarksons

Splash  SECTOR ▾ REGION ▾ MARITIME CEO ▾ CONTRIBUTIONS ▾ PUBLICATIONS ▾ EVE

Containers Europe

Hapag-Lloyd spends \$550m on new containers

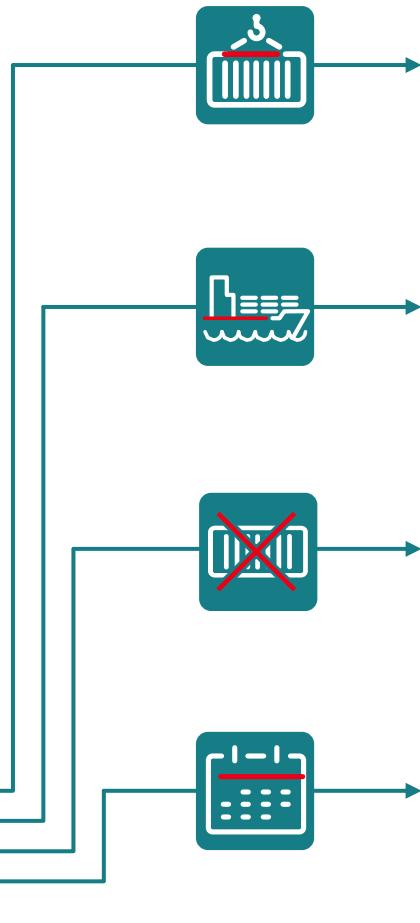


Adis Ajdin · April 14, 2021

6,530 1 minute read



The ramp up of newbuild production will certainly help alleviate some of the ongoing container equipment shortages, but the greatest impact will come from a normalisation of cargo demand development and carrier sailing schedules, as Covid-19 related disruption unwinds through the first half of 2021.



Volume surge expected to continue into Q2 + summer

- Continued strong growth expected esp. from eCommerce
- Factories are all back on full capacity
- Fight between destination market for factory capacity

No more capacity to be deployed

- Blank sailings to adjust schedules (Vessel Sliding Program)
- Global Idle capacity at minimum (maintenance & repairs)
- Further capacity shortage expected from extreme growth on TP
- Reduced vessel capacity expected due to drydock / scrubber installation

Equipment shortage situation expected to continue

- Equipment situation expected to become more constrained as of end of March
- On European side, congestion situation is getting worse, esp. Rotterdam/Antwerp (Get prepared for congestion surcharge)
- Weather impact still unpredictable

2021 Contract rates

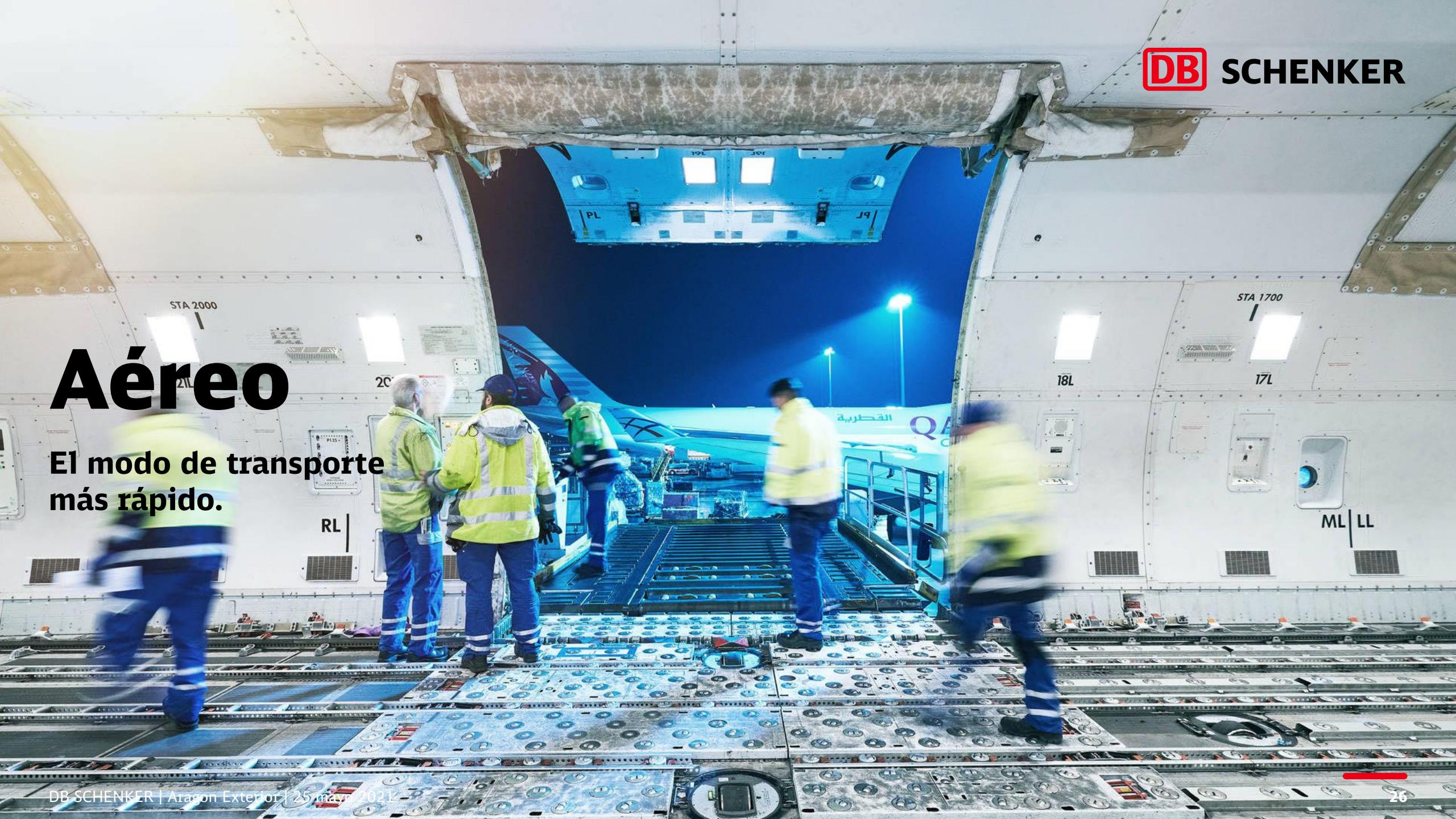
Current indications

- + 100% and higher vs prev. year + Bunker
- + PSS clauses
- + Enforced Dead Freight
- + Higher D&D charges / Shorter free time
- + FAK rates for volatile volumes

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Aéreo

El modo de transporte
más rápido.

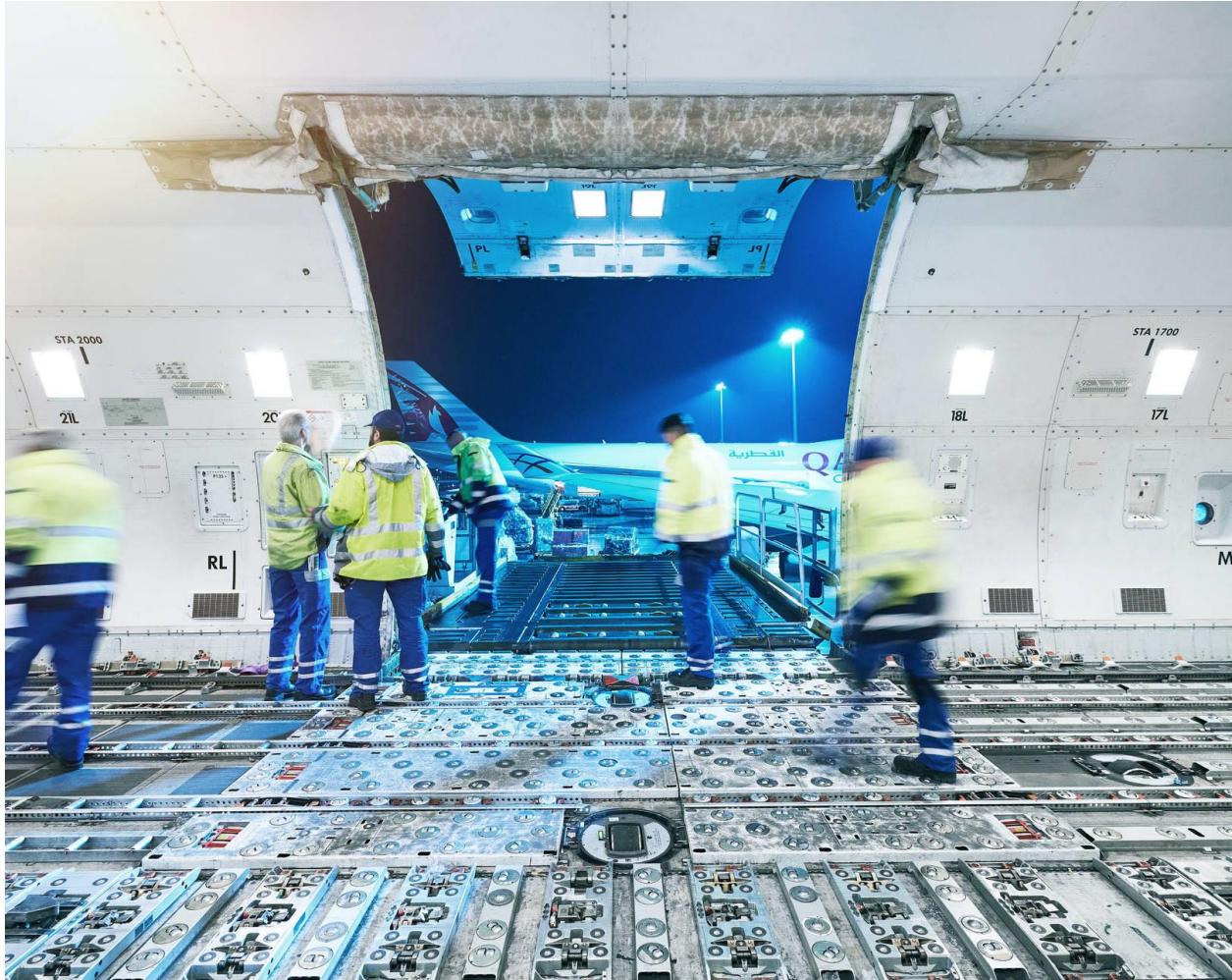


La carga aérea se transporta:

- En vuelos de pasajeros.
- En aviones cargueros.

Rutas aéreas entre España y China:

- Vuelos de directos España-China.
- Vuelos a través de Medio Oriente (Turquía, Dubai, Qatar)
- Vuelos a través de hubs europeos

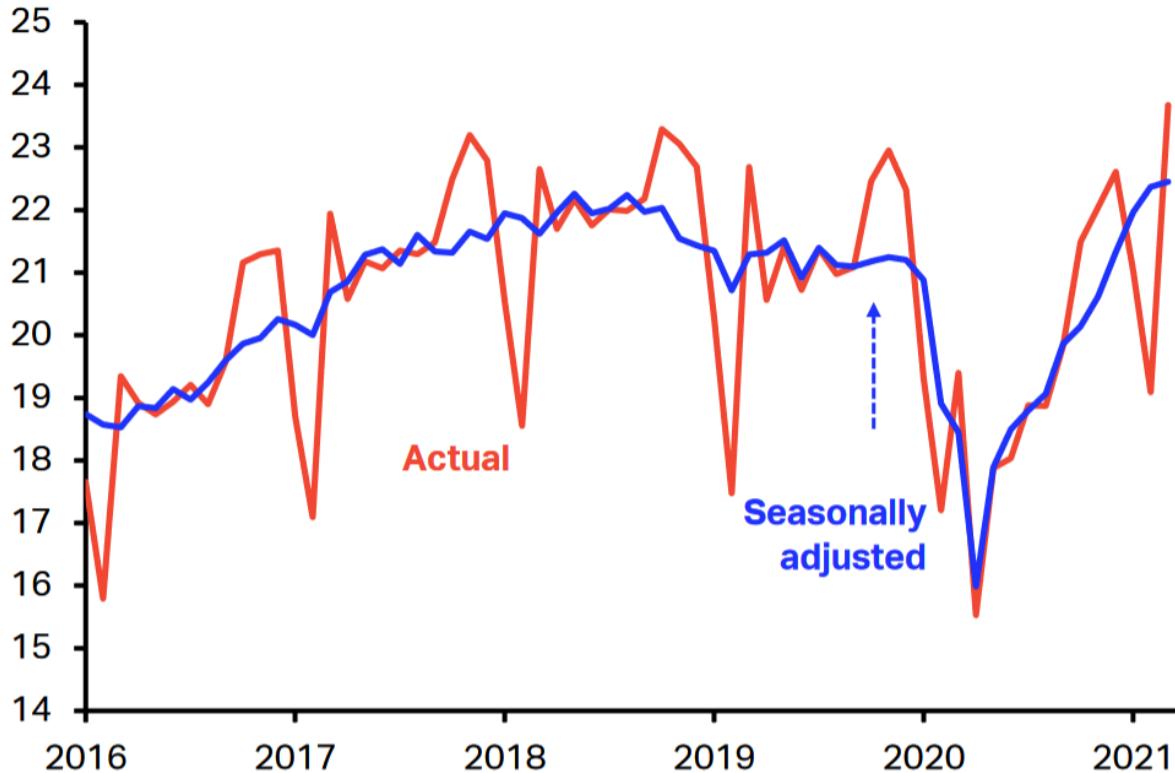


Máximo histórico en marzo para demanda de carga aérea: sube 4,4% respecto niveles precovid

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Chart 1: CTK levels, actual and seasonally adjusted

Industry CTKs (billion per month)

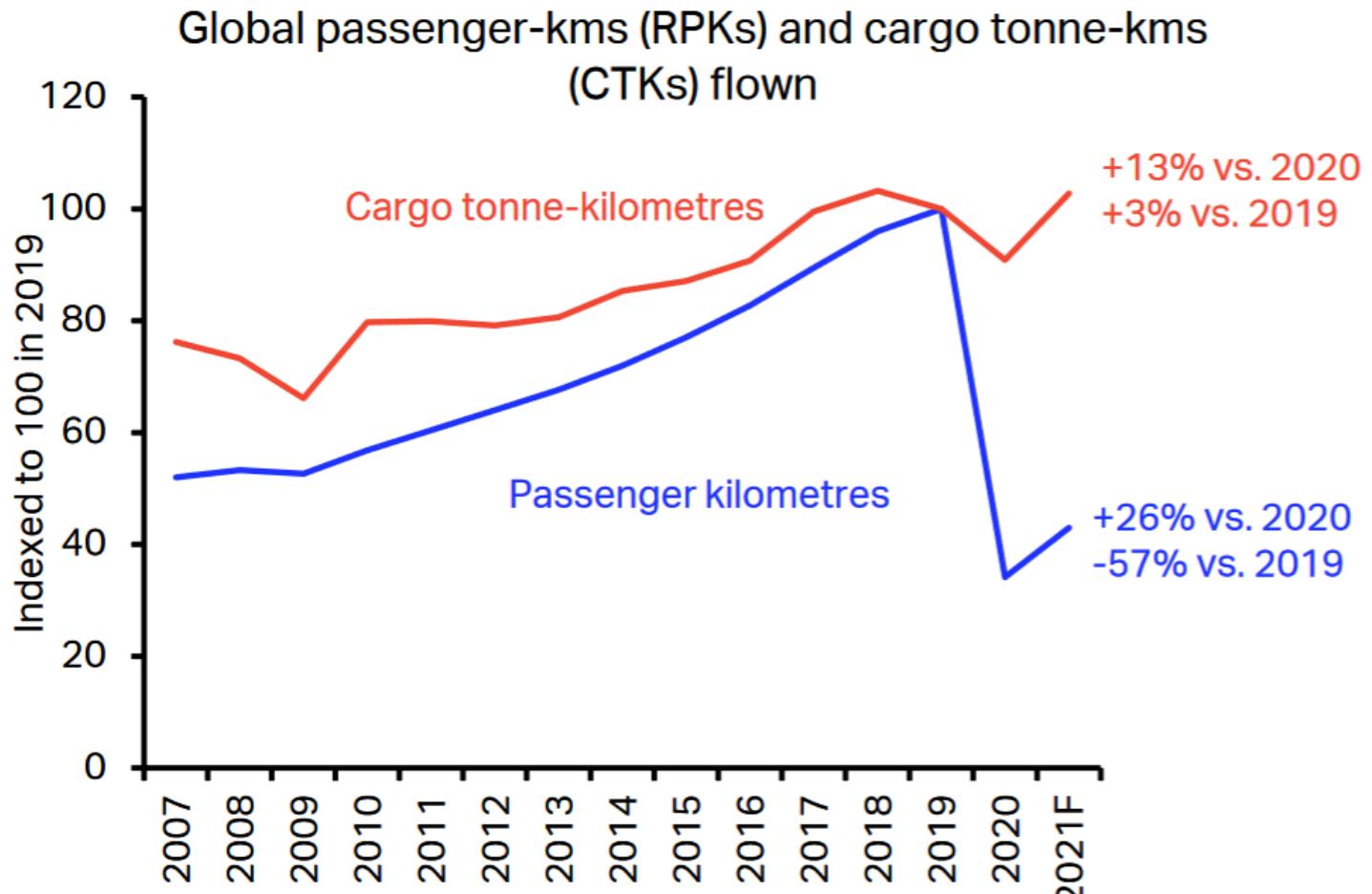


Sources: IATA Economics, IATA Monthly Statistics

CTK: Toneladas de carga por Kilómetro

Diferentes niveles de recuperación de la carga aérea vs pasajeros

Chart 4: CTK and RPK short-term forecast



Source: IATA Economics Airline Industry Financial Forecast Update – April 2021

Máximo histórico en marzo para demanda de carga aérea: sube 4,4% respecto niveles precovid



Mercado de carga aérea – Marzo 2021

	Cuota mundial ¹	Marzo 2021 (% respecto a marzo 2019)			
		CTK	ACTK	CLF (%-pt) ²	CLF (nivel) ³
Total Mercado	100%	4.4%	-11.7%	9.0%	58.8%
África	2.0%	23.1%	-4.6%	11.2%	49.9%
Asia-Pacífico	32.4%	-2.9%	-18.6%	10.7%	66.1%
Europa	22.3%	0.9%	-17.1%	12.2%	68.5%
Latinoamérica	2.4%	-21.4%	-39.9%	10.6%	45.3%
Oriente Medio	12.9%	9.1%	-12.5%	12.1%	61.3%
Norteamérica	27.9%	17.5%	3.8%	5.5%	47.2%

¹ % CTK de la industria en 2020; ² Variación del factor de ocupación respecto mismo mes 2019; ³ Nivel del factor de ocupación.

- CTK: Toneladas de carga por Kilómetro; ACTK: Toneladas de carga por KM disponibles;

DB SCHENKER Flight Operation

Own Capacity connecting main business tradelanes



Integrated Supply Chain - DB SCHENKER's flight operations are integrated into the global airfreight hub system. The utilization of our land transport networks allows Schenker control over the complete transport chain:

Independence from commercial airlines and their flight schedules



Stable uplift and capacity in an unpredictable market situation



Availability of capacity even during peak seasons



Reduction of transit time due to fast and easy pre-/on carriage through our Trucking Networks



Wide range of shipping solutions for heavy and oversized, including hazardous goods

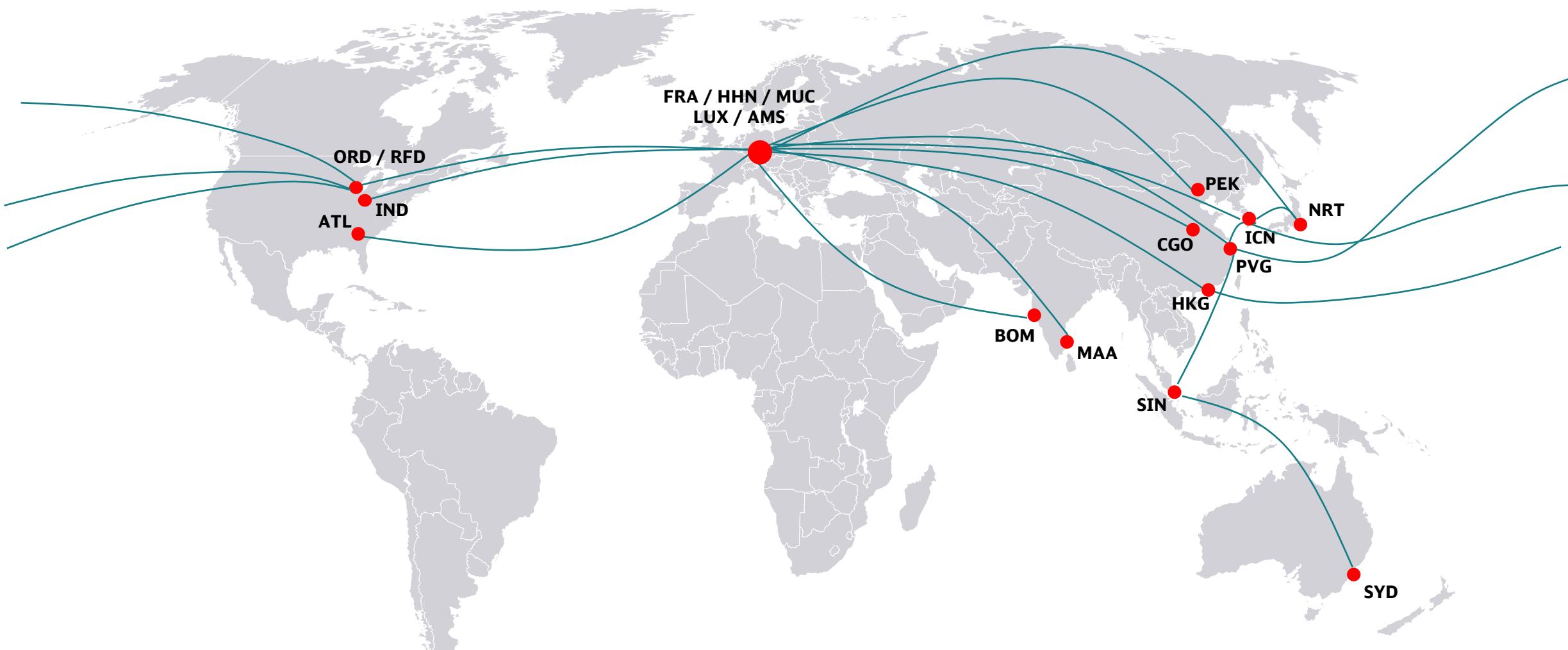


Lean production due to the reduction of intermediates in the transport chain



DB SCHENKER Flight Operation

Visual Flight Schedule / Illustration 1



These increased scheduled charter flights are in addition to other major commercial block space agreements DB Schenker holds with preferred airline partners.

DB SCHENKER Flight Operation

Visual Flight Schedule / Illustration 2 (1/2)



These increased scheduled charter flights are in addition to other major commercial block space agreements DB Schenker holds with preferred airline partners.

	1	2	3	4	5	6	7	* DEP/ARR in UTC * All schedules subject to change
FRA-CGO	B747-400F							
CGO-AMS	B747-400F							
FRA-PEK	B747-400F							
PEK-FRA	B747-400F							
FRA-PVG	B747-400F							
PVG-FRA	B747-400F							
PVG-LUX-PVG	B777F							Start of roundtrip day 6 (PVG)
HHN-PVG-HHN	B747-400F							Start of roundtrip day 6 (HHN)
CGO-HHN	B747-400F							
HHN-CGO	B747-400F							
RFD-MUC-MUC-NRT-ICN-MUC-RFD	B747-400F							Start of roundtrip day 6 (RFD)
FRA-PVG-FRA*	B777F							* „carbon-neutral cargo flight“

DB SCHENKER Flight Operation



Visual Flight Schedule / Illustration 2 (2/2)

These increased scheduled charter flights are in addition to other major commercial block space agreements DB Schenker holds with preferred airline partners.

	1	2	3	4	5	6	7	
FRA-BOM-FRA- ATL-FRA	B747-400F				✈	✈	✈	* Start of roundtrip day 5 (FRA) NEW routing
LUX-IND-LUX	B747-400F			✈	✈	✈		Start of roundtrip day 5 (LUX)
FRA-RFD-FRA	B747-400F			✈	✈	✈		Start of roundtrip day 4 (FRA)
FRA-ORD-FRA	B747-400F					✈	✈	Start of roundtrip day 6 (FRA)
PVG-ORD	B747-400F		✈	✈				
ORD-ICN-PVG-RFD	B747-400F			✈	✈	✈	✈	Start of roundtrip day 4 (ORD)
RFD-ICN-PVG-RFD	B747-400F	✈				✈	✈	Start of roundtrip day 6 (RFD)
HKG-HHN	B747-400F	✈					✈	
MUC-MAA-MUC- RFD	B747-400F			✈	✈	✈	✈	Start on day 4 (MUC)
HKG-ORD	B747-400F		✈	✈				
PVG-SIN-SYD	B747-400F			✈	✈	✈		
HKG-HHN*	B747-400F			✈	✈		✈	* NEW: eff. May 19th, 2021

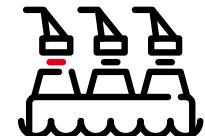
Skybridge (Sea & Air)

Primero en barco, luego en avión.

Asia Load Ports Dubai Route



Transit Time Dubai Route



Ocean
14-15
days

Transit
1 day

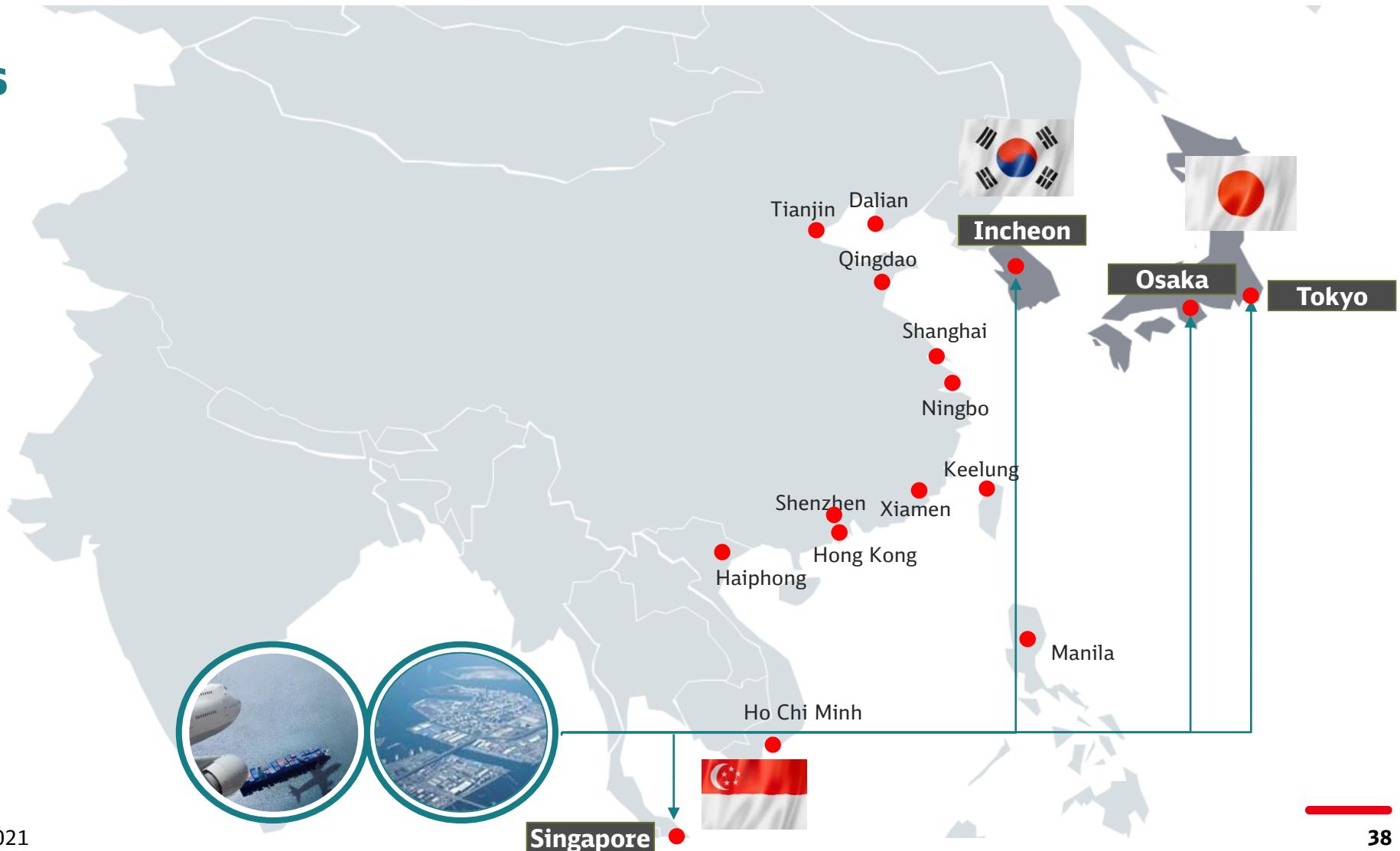


TOTAL 17-18 days

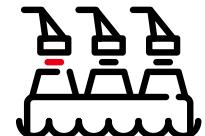
Skybridge – combinación de marítimo y aéreo

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Asia Load Ports JP | KR | SG Routes



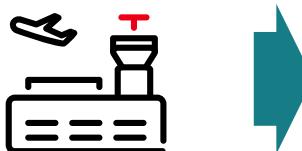
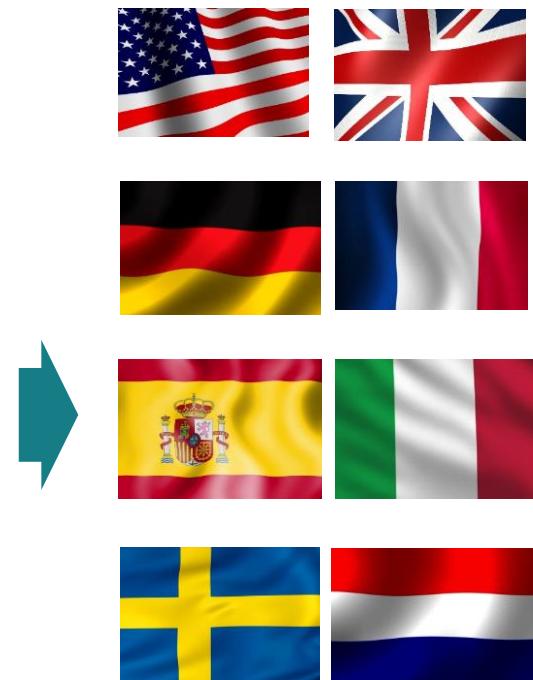
Transit Time JP | KR | SG Routes



Ocean
3-4 días



Transit
2 días



Air
3-4 días

TOTAL 9-10 días

Rail

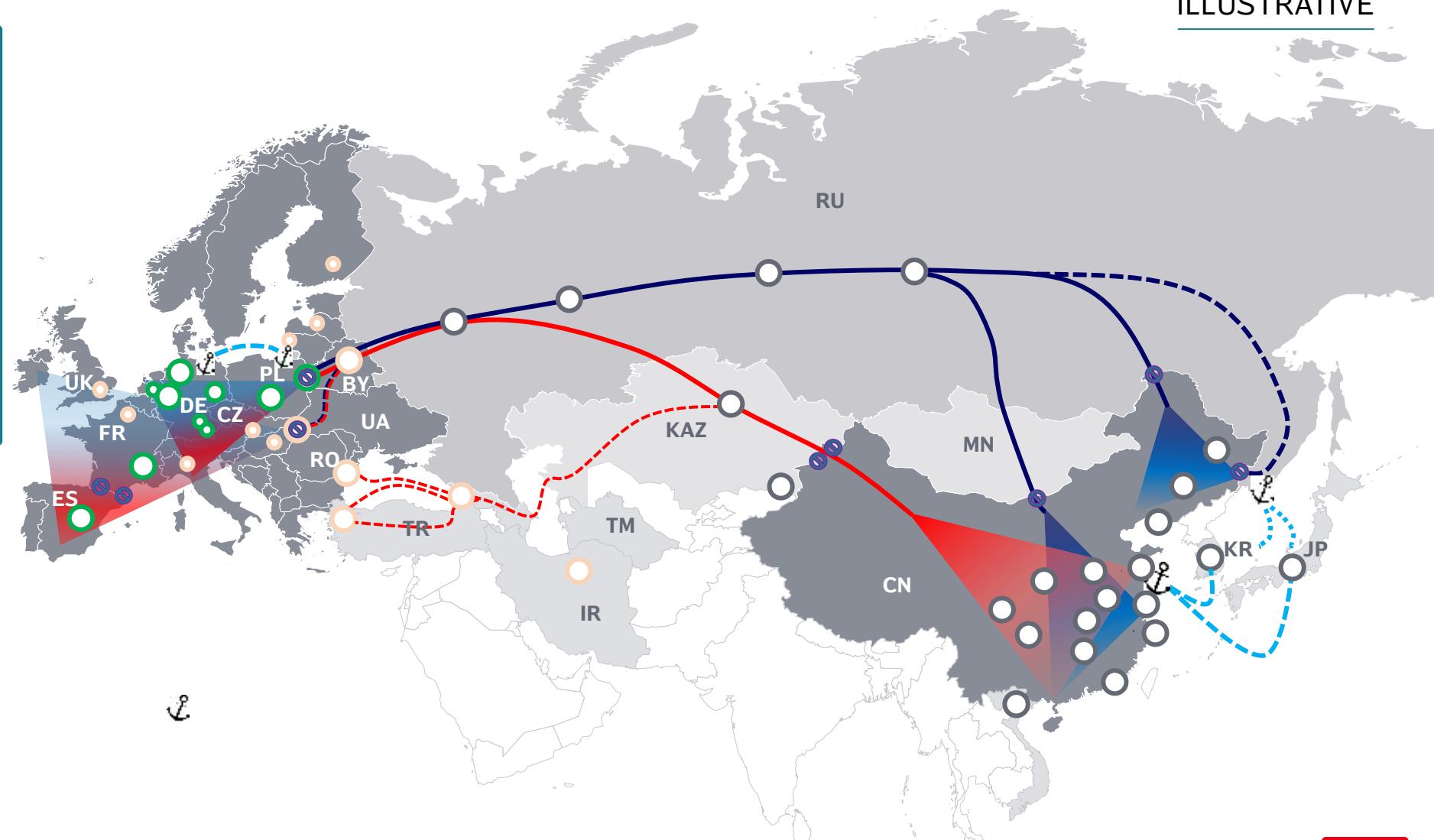
Soluciones logísticas innovativas
entre China y Europa.

ILLUSTRATIVE

Tren

La ventaja de DB Schenker:
Nuestras redes de transporte
terrestre en China y en
Europa están perfectamente
conectadas con Trans-
Eurasian block trains

- Northern route
- Southern route
- - - Tested routes
- Short Sea connected / Forus
- Gauge change (1435/1520/1668)
- Regular services
- Tested services



China: DB Schenker connects New Silkroad rail network with own local presence and expertise

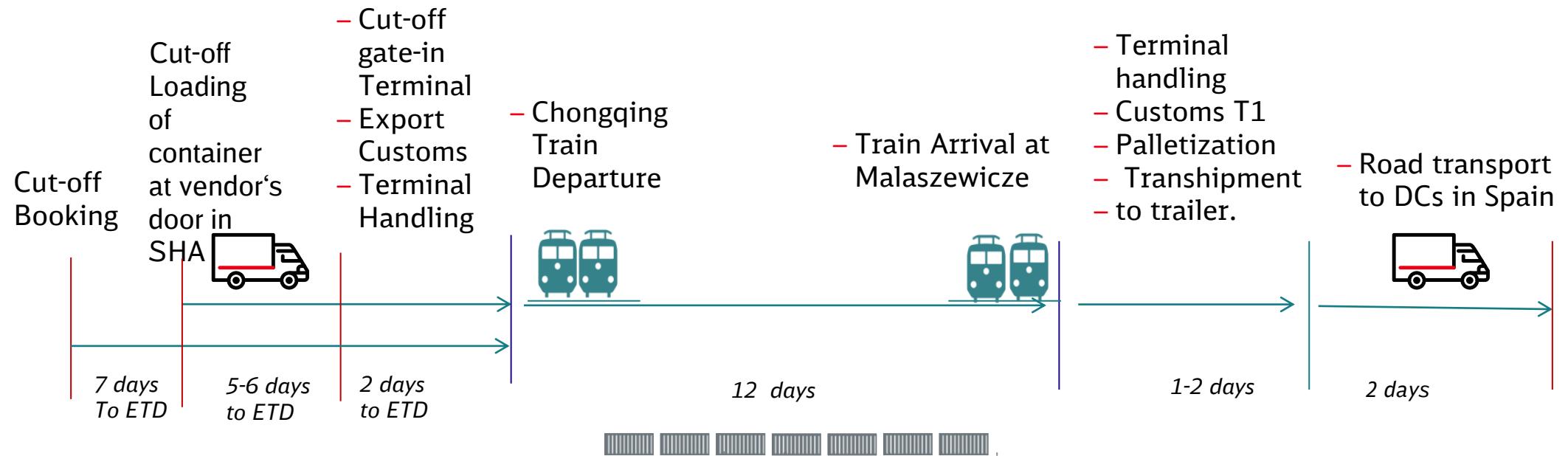
DB Schenker China at a glance

- More than 50 years in China
- Full regional coverage with offices in 66 cities
- 92 warehouses*
- 5,700 logistics specialists
- 790,000 m² warehouse area*
- Class A licensed international freight forwarding company
- **Operational expertise**
 - + creation of block train products for Chongqing and Zhengzhou
 - + documentation, customs, routing options, local presence etc.
- **Close ties to China Railway**
CRCT, CRIMT, Local Railway stations, Terminal JV CR Intermodal

*Includes air freight, ocean freight and contract logistics warehouses



Timmings chart flow - Looking after the best lead time.



Lead time door to door China - Spain: 21 – 22 calendar days
 From loading at Vendor's warehouse to delivery at Spain DC

Full scope of rail products is operated on the Trans Eurasian corridor



LCL Shipments

- 5 LCL services from Wuhan to Europe and from Germany to Wuhan
- Regular departures with own controlled services on an end-to-end basis
- Transit time door-door: around 23-27 days



Single containers Group of containers

- Full door-to-door FCL service incl. pre- and on-carriage as well as additional services
- Several departures per week on various routes possible
- Different consolidation options are available



Block trains

- Available as multi-customer public train for different customers: min. 1 FEU (FCL)
- Top speed due to block train prioritization
- Available as company train for one customer volume requirement: 41-51 FEU per train



China Road (Pre- Covid)

Nuestra opción premium, puerta-a-puerta, para unir China con Europa por carretera, con tiempos de tránsito rápidos y confiables y capacidad flexible.



Carretera

En cuarta

DB SCHENKER

- Ruta Sur via Horgos

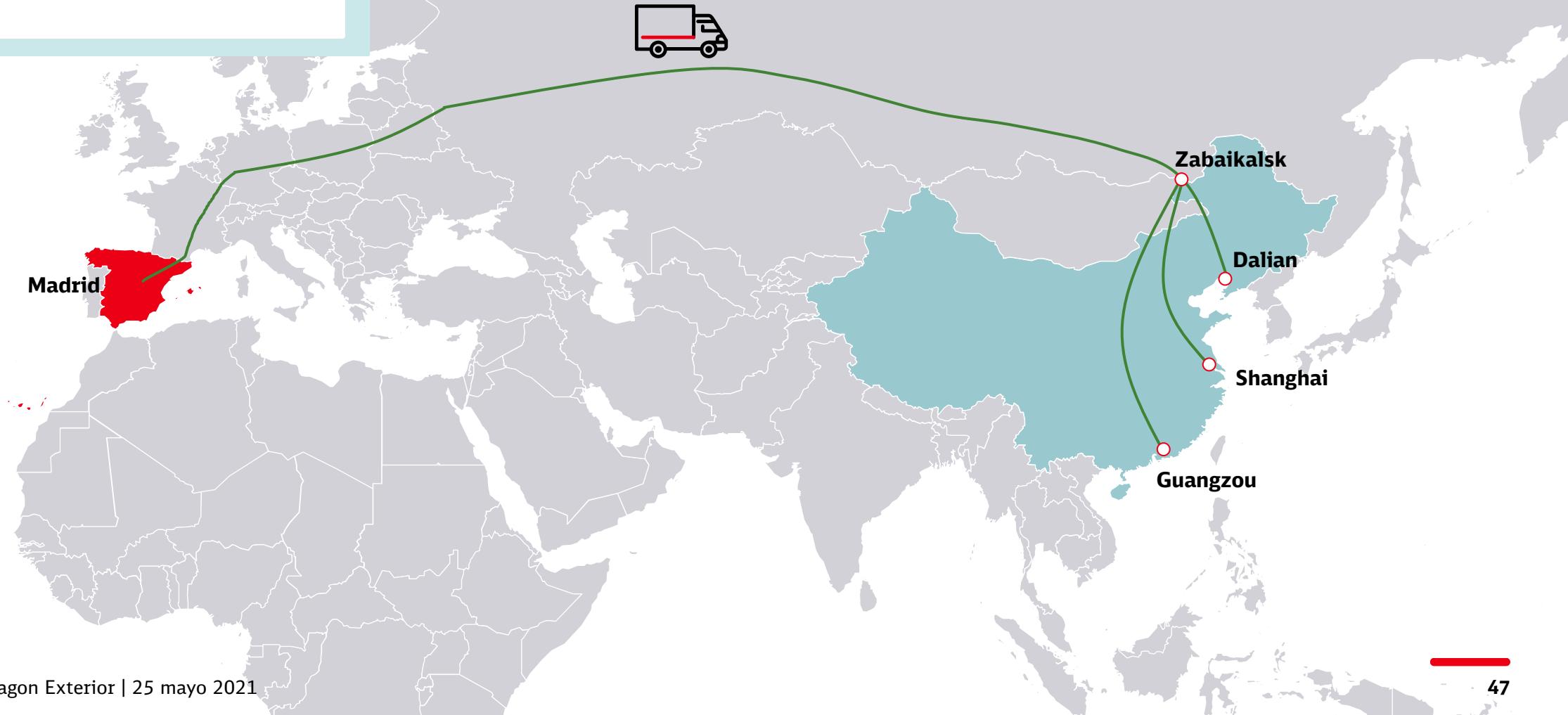


Carretera

En cuarta

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- Ruta Norte vía Zabaikalsk



Ruta Norte vía Zabaikalsk

Ejemplo tiempo de tránsito con EXPRESS Service



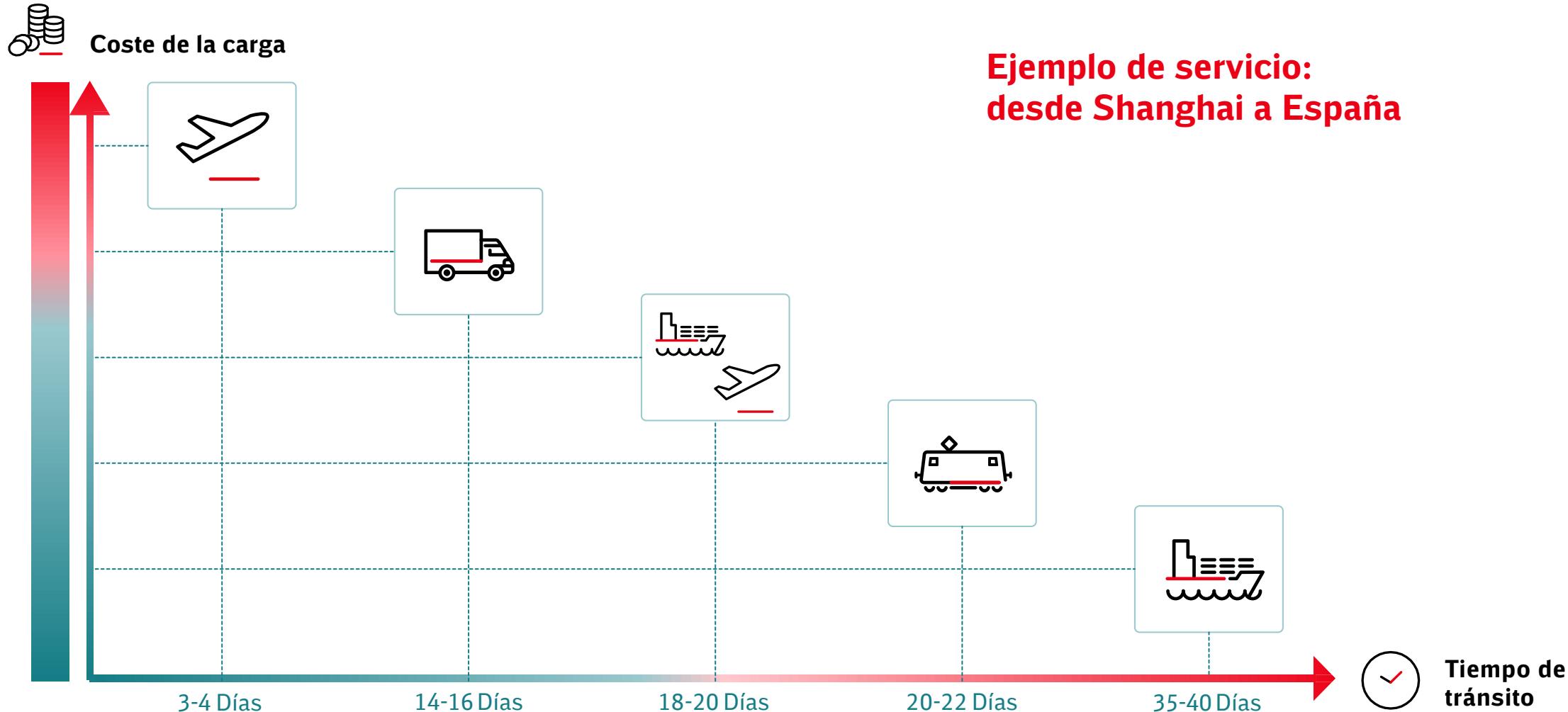
* Hasta la frontera de La Junquera

- 1. Acerca de DB Schenker**
- 2. Conexiones de España con China**
- 3. Situación del mercado de transporte marítimo**
- 4. Los otros modos de transporte alternativos: Aéreo, Marítimo/Aéreo, Tren y Carretera.**
- 5. Comparativa modos de transporte - Coste vs tiempo de tránsito**

Comparativa modos de transporte

Coste vs tiempo de tránsito

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¡Muchas gracias!