

# THE 30<sup>th</sup> IAPH WORLD PORTS CONFERENCE

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#### Role of Feeder in the Shipping Industry

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**Evolution Shipping Industry & Shipping Route** 

#### **Outline**

- Feeder Business
- Feeder Evolution & Role
- Who is who on the Feeder Industry
- SSL as one of the main Feeder Operators
- Outlook and SSL Development





## **Feeder Business**



#### What is Feeder?

- Vessel Size Evolution
- Hub & Spoke Port Concept
- Feeder as main supporter of Hub Spoke Concept

#### **Hub Ports**

#### **Spoke Ports**





**Origin/ Destination** 



## Benefit & Type of Feeder?

#### Feeder Benefit

- Transit Time
- Cost Benefit
- Frequency
- Market Penetrating Agent

#### Type of Feeder

- Common Regional/ International Feeder
- Dedicated Regional/ International Feeder
- Domestic Feeder





## Feeder Evolution & Role



#### Feeder Size Evolution?

- Feeder Size Evolution
  - >> 20 years Ago

<< 1,000 teus



- Feeder Size Evolution
  - >> 20 years Ago

As big as Post Panamax vessel



#### Feeder Role

#### To the Container Hub Ports

- Growth Engine
- Connectivity & Frequency
- Hub Ports Efficiency
- Market Penetrating Agent

### To the Spoke Ports

- Growth Engine
- Connectivity & Frequency
- Cargo conversions
- Opening of new Spoke Ports

#### To the Long-haul Carriers

- Growth Engine
- Connectivity & Frequency
- Market Penetrating Agent
- Cargo Conversions Agent





Who is who on the Feeder Industry

### Who is Who on the Feeder Industry

APM-Maersk			TOTAL	
2         Mediterranean Shg Co         3,055,583         510           3         CMA CGM Group         2,238,167         454           4         COSCO Shipping Co Ltd         1,718,797         315           5         Hapag-Lloyd         1,052,465         175           6         Evergreen Line         1,052,465         175           7         OOCL         676,570         107           8         NYK Line         603,692         108           9         Yang Ming Marine Transport Corp.         585,206         99           10         Hamburg Süd Group         559,164         106           11         MOL         516,263         79           12         UASC         485,554         50           13         Hyundai M.M.         404,793         65           14         PIL (Pacific Int. Line)         374,810         142           15         K Line         368,610         63           16         Zim         331,222         73           17         Wan Hai Lines         238,071         89           18         X-Press Feeders Group         141,850         87           18         K-Tress Feeders Group	Rnk	Operator	TEU	Ships
3         CMA CGM Group         2,238,167         454           4         COSCO Shipping Co Ltd         1,718,797         315           5         Hapag-Lloyd         1,052,465         175           6         Evergreen Line         1,022,831         194           7         OCCL         676,570         107           8         NYK Line         603,692         108           9         Yang Ming Marine Transport Corp.         585,206         99           10         Hamburg Süd Group         559,164         106           11         MoL         516,263         79           12         UASC         485,554         50           12         UASC         485,554         50           14         PIL (Pacific Int. Line)         374,810         142           15         K Line         368,610         63           16         Zim         331,222         73           17         Wan Hai Lines         238,071         89           18         X-Press Feeders Group         141,850         87           19         K.MTC         123,871         62           20         SITC         103,334         77	1	APM-Maersk	3,330,375	633
4 COSCO Shipping Co Ltd 1,718,797 315   5 Hapag-Lloyd 1,052,465 175   6 Evergreen Line 1,052,831 194   7 OOCL 676,570 107   8 NYK Line 603,692 108   9 Yang Ming Marine Transport Corp. 585,206 99   10 Hamburg SĀ'xd Group 559,164 106   11 MOL 516,263 79   12 UASC 485,554 50   13 Hyundai M.M. 404,793 65   14 PIL (Pacific Int. Line) 374,810 142   15 K Line 368,610 63   16 Zim 331,222 73   17 Wan Hai Lines 238,071 89   18 X-Press Feeders Group 141,850 87   19 KMTC 123,871 62   20 SITC 103,334 77   21 IRISL Group 97,671 45   22 Arkas Line / EMES 74,310 42   23 Sinotrans 68,271 44   24 Quanzhou An Sheng Shg Co 67,073 46   25 TS Lines 65,314 32   26 Simatech 64,953 21   27 SM Line Corp. 62,978 15   28 Zhonggu Shipping 60,240 45   29 UniFeeder 54,480 50   30 Grimaldi (Napoli) 50,622 42   31 Transworld Group 50,071 30   32 Emirates Shipping Line 48,085 10   33 RCL (Regional Container L.) 48,085 10   34 Sinotor 44,049 14   36 Matson 42,984 29   39 Stream Line (Seatrade BV) 38,445 55   40 Salam Pasific 38,070 11   47 Termas Line 229,990 50   48 Namsung Shipping 25,253 27   48 Namsung Shipping 40,950 35   49 Shipping Corp. of India 22,978 5	2	Mediterranean Shg Co	3,055,583	510
5 Hapag-Lloyd         1,052,465         175           6 Evergreen Line         1,022,831         194           7 OOCL         676,570         107           8 NYK Line         603,692         108           9 Yang Ming Marine Transport Corp.         585,206         99           10 Hamburg S¼d Group         559,164         106           11 MOL         516,263         79           12 UASC         485,554         50           13 Hyundai M.M.         404,793         65           14 PIL (Pacific Int. Line)         374,810         142           15 K Line         368,610         63           16 Zim         331,222         73           17 Wan Hai Lines         238,071         89           18 X-Press Feeders Group         141,850         87           19 KMTC         123,871         62           20 SITC         103,334         77           21 IRISL Group         97,671         45           22 Arkas Line / EMES         74,310         42           23 Sinotrans         68,271         44           24 Quanzhou An Sheng Shg Co         67,073         46           25 TS Lines         65,314         32	3	CMA CGM Group	2,238,167	454
6 Evergreen Line 1,022,831 194 7 OOCL 676,570 107 8 NYK Line 603,692 108 9 Yang Ming Marine Transport Corp. 585,206 99 10 Hamburg S¼d Group 559,164 106 11 MOL 516,263 79 12 UASC 485,554 50 13 Hyundai M.M. 404,793 65 14 PIL (Pacific Int. Line) 374,810 142 15 K Line 368,610 63 16 Zim 331,222 73 17 Wan Hai Lines 238,071 89 18 X-Press Feeders Group 141,850 87 19 KMTC 123,871 62 20 SITC 103,334 77 21 IRISL Group 97,671 45 22 Arkas Line / EMES 74,310 42 23 Sinotrans 68,271 44 24 Quanzhou An Sheng Shg Co 67,073 46 25 TS Lines 65,314 32 26 Simatech 64,953 21 27 SM Line Corp. 62,978 15 28 Zhonggu Shipping 60,240 45 29 UniFeeder 54,480 50 30 Grimaldi (Napoli) 50,622 42 31 Transworld Group 50,071 30 32 Emirates Shipping 48,085 10 33 RCL (Regional Container L.) 48,081 29 34 Rason 44,049 14 36 Matson 44,049 14 36 Matson 44,049 14 36 Matson 44,049 14 36 Matson 44,049 14 37 Swire Shipping 42,894 29 38 Heung-A Shipping 42,894 29 39 Stream Line (Seatrade BV) 38,495 56 40 Salam Pasific 38,393 46 41 Samudera 37,346 37 42 Seaboard Marine 35,586 42 43 Ningbo Ocean Shg Co 31,586 42 44 Ningbo Ocean Shg Co 31,586 42 45 Tranto Intim Line 29,990 50 46 Linea Messina 28,070 11 47 Temas Line 48,085 27 49 Shipping Corp. of India 21,078 5	4	COSCO Shipping Co Ltd	1,718,797	315
7         OOCL         676,570         107           8         NYK Line         603,692         108           9         Yang Ming Marine Transport Corp.         585,206         99           10         Hamburg Süd Group         559,164         106           11         MOL         516,263         79           12         UASC         485,554         50           13         Hyundai M.M.         404,793         65           14         PIL (Pacific Int. Line)         374,810         142           15         K Line         368,610         63           16         Zim         331,222         73           17         Wan Hai Lines         238,071         89           18         X-Press Feeders Group         141,850         87           19         KMTC         123,871         62           20         SITC         103,334         77           21         IRISL Group         97,671         45           22         Sinotrans         68,271         44           24         Quanzhou An Sheng Shg Co         67,073         46           25         Sinnetech         64,953         21	5	Hapag-Lloyd	1,052,465	175
8         NYK Line         603,692         108           9         Yang Ming Marine Transport Corp.         585,206         99           10         Hamburg Sýd Group         559,164         106           11         MOL         516,263         79           12         UASC         485,554         50           13         Hyundai M.M.         404,793         65           14         PIL (Pacific Int. Line)         374,810         142           15         K Line         368,610         63           16         Zim         331,222         73           17         Wan Hai Lines         238,071         89           18         X-Press Feeders Group         141,850         87           19         KMTC         123,871         62           20         SITC         103,334         77           21         IRISL Group         97,671         45           24         Arkas Line / EMES         74,310         42           23         Sinotrans         68,271         44           24         Quanzhou An Sheng Shg Co         67,073         46           25         TS Lines         65,314         32	6	Evergreen Line	1,022,831	194
9 Yang Ming Marine Transport Corp. 585,206 99 10 Hamburg SĀ'/xd Group 559,164 106 11 MOL 516,263 79 12 UASC 485,554 50 13 Hyundai M.M. 404,793 65 14 PIL (Pacific Int. Line) 374,810 142 15 K Line 368,610 63 16 Zim 331,222 73 17 Wan Hai Lines 238,071 89 18 X-Press Feeders Group 141,850 87 19 KMTC 123,871 62 20 SITC 103,334 77 21 IRISL Group 97,671 45 22 Arkas Line / EMES 74,310 42 23 Sinotrans 68,271 44 24 Quanzhou An Sheng Shg Co 67,073 46 25 TS Lines 65,314 32 26 Simatech 64,953 21 27 SM Line Corp. 662,978 15 28 Zhonggu Shipping 60,240 45 UniFeeder 54,480 50 30 Grimaldi (Napoli) 50,622 42 31 Transworld Group 50,071 30 32 Emirates Shipping Line 48,085 10 33 RCL (Regional Container L.) 48,085 39 34 Sinokor 46,298 39 35 NileDutch 44,049 14 36 Matson 43,049 26 37 Swire Shipping 42,894 29 38 Heung A Shipping 40,950 35 39 Stream Line (Seatrade BV) 38,393 46 41 Samudera 37,346 37 42 Ningbo Ocean Shg Co 31,586 42 43 Meratus 48 Nipping 25,253 27 48 Ningbo Ocean Shg Co 31,586 42 49 Ningbo Ocean Shg Co 31,586 42 41 Ningbo Ocean Shg Co 31,586 42 42 Ningbon Corp. 11 47 Temas Line 26,197 34 48 Namsung Shipping 25,253 27 49 Shipping Corp. of India 21,078 5	7	OOCL	676,570	107
10   Hamburg SÄ/ad Group   559,164   106     11   MOL	8	NYK Line	603,692	108
11         MOL         516,263         79           12         UASC         485,554         50           14         PIL (Pacific Int. Line)         374,810         142           15         K Line         368,610         63           16         Zim         331,222         73           17         Wan Hai Lines         238,071         89           18         X-Press Feeders Group         141,850         87           19         KMTC         123,871         62           20         SITC         103,334         77           21         IRISL Group         97,671         45           22         Arkas Line / EMES         74,310         42           23         Sinotrans         68,271         44           24         Quanzhou An Sheng Shg Co         67,073         46           25         TS Lines         65,314         32           26         Simatech         64,953         21           27         SM Line Corp.         62,978         15           28         Zhonggu Shipping         60,240         45           29         UniFeeder         54,480         50 <td< td=""><td>9</td><td>Yang Ming Marine Transport Corp.</td><td>585,206</td><td>99</td></td<>	9	Yang Ming Marine Transport Corp.	585,206	99
12 UASC         485,554         50           13 Hyundai M.M.         404,793         65           14 PIL (Pacific Int. Line)         374,810         142           15 K Line         368,610         63           16 Zim         331,222         73           17 Wan Hai Lines         238,071         89           18 X-Press Feeders Group         141,850         87           19 KMTC         123,871         62           20 SITC         103,334         77           21 IRISL Group         97,671         45           22 Arkas Line / EMES         74,310         42           23 Sinotrans         68,271         44           24 Quanzhou An Sheng Shg Co         67,073         46           25 TS Lines         65,314         32           26 Simatech         64,953         21           27 SM Line Corp.         62,978         15           28 Zhonggu Shipping         60,240         45           29 UniFeeder         54,480         50           30 Grimaldi (Napoli)         50,622         42           31 Transworld Group         50,071         30           32 Emirates Shipping Line         48,021         25	10	Hamburg Süd Group	559,164	106
13         Hyundai M.M.         404,793         65           14         PIL (Pacific Int. Line)         374,810         142           15         K Line         368,610         63           16         Zim         331,222         73           17         Wan Hai Lines         238,071         89           18         X-Press Feeders Group         141,850         87           19         KMTC         123,871         62           20         SITC         103,334         77           21         IRISL Group         97,671         45           22         Arkas Line / EMES         74,310         42           23         Sinotrans         68,271         44           24         Quanzhou An Sheng Shg Co         67,073         46           25         TS Lines         65,314         32           26         Simatech         64,953         21           27         SM Line Corp.         62,978         15           28         Zhonggu Shipping         60,240         45           29         UniFeeder         54,480         50           30         Grimaldi (Napoli)         50,622         42	11	MOL	516,263	79
14 PIL (Pacific Int. Line)         374,810         142           15 K Line         368,610         63           16 Zim         331,222         73           17 Wan Hai Lines         238,071         89           18 X-Press Feeders Group         141,850         87           19 KMTC         123,871         62           20 SITC         103,334         77           21 IRISL Group         97,671         45           22 Arkas Line / EMES         74,310         42           23 Sinotrans         68,271         44           24 Quanzhou An Sheng Shg Co         67,073         46           25 TS Lines         65,314         32           26 Simatech         64,953         21           27 SM Line Corp.         62,978         15           28 Zhonggu Shipping         60,240         45           29 UniFeeder         54,480         50           30 Grimaldi (Napoli)         50,622         42           31 Transworld Group         50,071         30           32 Emirates Shipping Line         48,085         10           33 RCL (Regional Container L.)         48,021         25           34 Sinokor         46,298         39	12	UASC	485,554	50
15         K Line         368,610         63           16         Zim         331,222         73           17         Wan Hai Lines         238,071         89           18         X-Press Feeders Group         141,850         87           19         KMTC         123,871         62           20         SITC         103,334         77           21         IRISL Group         97,671         45           22         Arkas Line / EMES         74,310         42           23         Sinotrans         68,271         44           24         Quanzhou An Sheng Shg Co         67,073         46           25         TS Lines         65,314         32           26         Simatech         64,953         21           27         SM Line Corp.         62,978         15           28         Zhonggu Shipping         60,240         45           29         UniFeeder         54,480         50           30         Grimaldi (Napoli)         50,622         42           31         Transworld Group         50,071         30           32         Emirates Shipping Line         48,085         10	13	Hyundai M.M.	404,793	65
16         Zim         331,222         73           17         Wan Hai Lines         238,071         89           18         X-Press Feeders Group         141,850         87           19         KMTC         123,871         62           20         SITC         103,334         77           21         IRISL Group         97,671         45           22         Arkas Line / EMES         74,310         42           23         Sinotrans         68,271         44           24         Quanzhou An Sheng Shg Co         67,073         46           25         TS Lines         65,314         32           26         Simatech         64,953         21           27         SM Line Corp.         62,978         15           28         Zhonggu Shipping         60,240         45           29         UniFeeder         54,480         50           30         Grimaldi (Napoli)         50,622         42           31         Transworld Group         50,071         30           32         Emirates Shipping Line         48,085         10           33         RCL (Regional Container L.)         48,021         <	14	PIL (Pacific Int. Line)	374,810	142
17         Wan Hai Lines         238,071         89           18         X-Press Feeders Group         141,850         87           19         KMTC         123,871         62           20         SITC         103,334         77           21         IRISL Group         97,671         45           22         Arkas Line / EMES         74,310         42           23         Sinotrans         68,271         44           24         Quanzhou An Sheng Shg Co         67,073         46           25         TS Lines         65,314         32           26         Simatech         64,953         21           27         SM Line Corp.         62,978         15           28         Zhonggu Shipping         60,240         45           29         UniFeeder         54,480         50           30         Grimaldi (Napoli)         50,622         42           31         Transworld Group         50,71         30           32         Emirates Shipping Line         48,085         10           33         RCL (Regional Container L.)         48,021         25           34         Sinokor         46,298	15	K Line	368,610	63
18         X-Press Feeders Group         141,850         87           19         KMTC         123,871         62           20         SITC         103,334         77           21         IRISL Group         97,671         45           22         Arkas Line / EMES         74,310         42           23         Sinotrans         68,271         44           24         Quanzhou An Sheng Shg Co         67,073         46           25         TS Lines         65,314         32           26         Simatech         64,953         21           27         SM Line Corp.         62,978         15           28         Zhonggu Shipping         60,240         45           29         UniFeeder         54,480         50           30         Grimaldi (Napoli)         50,622         42           31         Transworld Group         50,071         30           32         Emirates Shipping Line         48,085         10           33         RCL (Regional Container L.)         48,021         25           34         Sinokor         46,298         39           35         NileDutch         44,049 <td< td=""><td>16</td><td>Zim</td><td>331,222</td><td>73</td></td<>	16	Zim	331,222	73
19         KMTC         123,871         62           20         SITC         103,334         77           21         IRISL Group         97,671         45           22         Arkas Line / EMES         74,310         42           23         Sinotrans         68,271         44           24         Quanzhou An Sheng Shg Co         67,073         46           25         TS Lines         65,314         32           26         Simatech         62,978         15           27         SM Line Corp.         62,978         15           28         Zhonggu Shipping         60,240         45           29         UniFeeder         54,480         50           30         Grimaldi (Napoli)         50,071         30           31         Transworld Group         50,071         30           32         Emirates Shipping Line         48,085         10           33         RCL (Regional Container L.)         48,021         25           34         Sinokor         46,298         39           35         NileDutch         44,049         14           36         Matson         43,049         26 <td>17</td> <td>Wan Hai Lines</td> <td>238,071</td> <td>89</td>	17	Wan Hai Lines	238,071	89
20 SITC         103,334         77           21 IRISL Group         97,671         45           22 Arkas Line / EMES         74,310         42           23 Sinotrans         68,271         44           24 Quanzhou An Sheng Shg Co         67,073         46           25 TS Lines         65,314         32           26 Simatech         64,953         21           27 SM Line Corp.         62,978         15           28 Zhonggu Shipping         60,240         45           29 UniFeeder         54,480         50           30 Grimaldi (Napoli)         50,622         42           31 Transworld Group         50,071         30           32 Emirates Shipping Line         48,085         10           33 RCL (Regional Container L.)         48,021         25           34 Sinokor         46,298         39           35 NileDutch         44,049         14           36 Matson         43,049         26           37 Swire Shipping         42,894         29           38 Heung-A Shipping         40,950         35           39 Stream Line (Seatrade BV)         38,445         55           40 Salam Pasific         38,393         46 <td>18</td> <td>X-Press Feeders Group</td> <td>141,850</td> <td>87</td>	18	X-Press Feeders Group	141,850	87
21       IRISL Group       97,671       45         22       Arkas Line / EMES       74,310       42         23       Sinotrans       68,271       44         24       Quanzhou An Sheng Shg Co       67,073       46         25       TS Lines       65,314       32         26       Simatech       64,953       21         27       SM Line Corp.       62,978       15         28       Zhonggu Shipping       60,240       45         29       UniFeeder       54,480       50         30       Grimaldi (Napoli)       50,622       42         31       Transworld Group       50,071       30         32       Emirates Shipping Line       48,085       10         33       RCL (Regional Container L.)       48,021       25         34       Sinokor       46,298       39         35       NileDutch       44,049       14         36       Matson       43,049       26         37       Swire Shipping       42,894       29         38       Heung-A Shipping       40,950       35         39       Stream Line (Seatrade BV)       38,445       55	19	KMTC	123,871	62
22 Arkas Line / EMES       74,310       42         23 Sinotrans       68,271       44         24 Quanzhou An Sheng Shg Co       67,073       46         25 TS Lines       65,314       32         26 Simatech       64,953       21         27 SM Line Corp.       62,978       15         28 Zhonggu Shipping       60,240       45         29 UniFeeder       54,480       50         30 Grimaldi (Napoli)       50,622       42         31 Transworld Group       50,071       30         32 Emirates Shipping Line       48,085       10         33 RCL (Regional Container L.)       48,021       25         34 Sinokor       46,298       39         35 NileDutch       44,049       14         36 Matson       43,049       26         37 Swire Shipping       42,894       29         38 Heung-A Shipping       40,950       35         39 Stream Line (Seatrade BV)       38,445       55         40 Salam Pasific       38,393       46         41 Samudera       37,346       37         42 Seaboard Marine       35,586       24         43 Meratus       32,734       51	20	SITC	103,334	77
23       Sinotrans       68,271       44         24       Quanzhou An Sheng Shg Co       67,073       46         25       TS Lines       65,314       32         26       Simatech       64,953       21         27       SM Line Corp.       62,978       15         28       Zhonggu Shipping       60,240       45         29       UniFeeder       54,480       50         30       Grimaldi (Napoli)       50,622       42         31       Transworld Group       50,071       30         32       Emirates Shipping Line       48,085       10         33       RCL (Regional Container L.)       48,021       25         34       Sinokor       46,298       39         35       NileDutch       44,049       14         36       Matson       43,049       26         37       Swire Shipping       42,894       29         38       Heung-A Shipping       40,950       35         39       Stream Line (Seatrade BV)       38,445       55         40       Salam Pasific       38,393       46         41       Samudera       37,346       37	21	IRISL Group	97,671	45
24         Quanzhou An Sheng Shg Co         67,073         46           25         TS Lines         65,314         32           26         Simatech         64,953         21           27         SM Line Corp.         62,978         15           28         Zhonggu Shipping         60,240         45           29         UniFeeder         54,480         50           30         Grimaldi (Napoli)         50,622         42           31         Transworld Group         50,071         30           32         Emirates Shipping Line         48,085         10           33         RCL (Regional Container L.)         48,085         10           34         Sinokor         46,298         39           35         NileDutch         44,049         14           36         Matson         43,049         26           37         Swire Shipping         42,894         29           38         Heung-A Shipping         40,950         35           39         Stream Line (Seatrade BV)         38,445         55           40         Salam Pasific         38,393         46           41         Samudera         37,346 <td>22</td> <td>Arkas Line / EMES</td> <td>74,310</td> <td>42</td>	22	Arkas Line / EMES	74,310	42
25 TS Lines       65,314       32         26 Simatech       64,953       21         27 SM Line Corp.       62,978       15         28 Zhonggu Shipping       60,240       45         29 UniFeeder       54,480       50         30 Grimaldi (Napoli)       50,622       42         31 Transworld Group       50,071       30         32 Emirates Shipping Line       48,085       10         33 RCL (Regional Container L.)       48,021       25         34 Sinokor       46,298       39         35 NileDutch       44,049       14         36 Matson       43,049       26         37 Swire Shipping       42,894       29         38 Heung-A Shipping       40,950       35         39 Stream Line (Seatrade BV)       38,445       55         40 Salam Pasific       38,393       46         41 Samudera       37,346       37         42 Seaboard Marine       35,586       24         43 Meratus       32,734       51         44 Ningbo Ocean Shg Co       31,586       42         45 Tanto Intim Line       29,990       50         46 Linea Messina       28,070       11	23	Sinotrans	68,271	44
26       Simatech       64,953       21         27       SM Line Corp.       62,978       15         28       Zhonggu Shipping       60,240       45         29       UniFeeder       54,480       50         30       Grimaldi (Napoli)       50,622       42         31       Transworld Group       50,071       30         32       Emirates Shipping Line       48,085       10         33       RCL (Regional Container L.)       48,021       25         34       Sinokor       46,298       39         35       NiieDutch       44,049       14         36       Matson       43,049       26         37       Swire Shipping       42,894       29         38       Heung-A Shipping       40,950       35         39       Stream Line (Seatrade BV)       38,445       55         40       Salam Pasific       38,393       46         41       Samudera       37,346       37         42       Seaboard Marine       35,586       24         43       Meratus       32,734       51         44       Ningbo Ocean Shg Co       31,586       42	24	Quanzhou An Sheng Shg Co	67,073	46
27       SM Line Corp.       62,978       15         28       Zhonggu Shipping       60,240       45         29       UniFeeder       54,480       50         30       Grimaldi (Napoli)       50,622       42         31       Transworld Group       50,071       30         32       Emirates Shipping Line       48,085       10         33       RCL (Regional Container L.)       48,021       25         34       Sinokor       46,298       39         35       NileDutch       44,049       14         36       Matson       43,049       26         37       Swire Shipping       42,894       29         38       Heung-A Shipping       40,950       35         39       Stream Line (Seatrade BV)       38,445       55         40       Salam Pasific       38,393       46         41       Samudera       37,346       37         42       Seaboard Marine       35,586       24         43       Meratus       32,734       51         44       Ningbo Ocean Shg Co       31,586       42         45       Tanto Intim Line       29,990       50	25	TS Lines	65,314	32
28       Zhonggu Shipping       60,240       45         29       UniFeeder       54,480       50         30       Grimaldi (Napoli)       50,622       42         31       Transworld Group       50,071       30         32       Emirates Shipping Line       48,085       10         33       RCL (Regional Container L.)       48,021       25         34       Sinokor       46,298       39         35       NileDutch       44,049       14         36       Matson       43,049       26         37       Swire Shipping       40,950       35         39       Stream Line (Seatrade BV)       38,445       55         40       Salam Pasific       38,393       46         41       Samudera       37,346       37         42       Seaboard Marine       35,586       24         43       Meratus       32,734       51         44       Ningbo Ocean Shg Co       31,586       42         45       Tanto Intim Line       29,990       50         46       Linea Messina       28,070       11         47       Temas Line       26,197       34 <td>26</td> <td>Simatech</td> <td>64,953</td> <td>21</td>	26	Simatech	64,953	21
29 UniFeeder       54,480       50         30 Grimaldi (Napoli)       50,622       42         31 Transworld Group       50,071       30         32 Emirates Shipping Line       48,085       10         33 RCL (Regional Container L.)       48,021       25         34 Sinokor       46,298       39         35 NileDutch       44,049       14         36 Matson       43,049       26         37 Swire Shipping       42,894       29         38 Heung-A Shipping       40,950       35         39 Stream Line (Seatrade BV)       38,445       55         40 Salam Pasific       38,393       46         41 Samudera       37,346       37         42 Seaboard Marine       35,586       24         43 Meratus       32,734       51         44 Ningbo Ocean Shg Co       31,586       42         45 Tanto Intim Line       29,990       50         46 Linea Messina       28,070       11         47 Temas Line       26,197       34         48 Namsung Shipping       25,253       27         49 Shipping Corp. of India       21,078       5	27	SM Line Corp.	62,978	15
30         Grimaldi (Napoli)         50,622         42           31         Transworld Group         50,071         30           32         Emirates Shipping Line         48,085         10           33         RCL (Regional Container L.)         48,021         25           34         Sinokor         46,298         39           35         NileDutch         44,049         14           36         Matson         43,049         26           37         Swire Shipping         42,894         29           38         Heung-A Shipping         40,950         35           39         Stream Line (Seatrade BV)         38,445         55           40         Salam Pasific         38,393         46           41         Samudera         37,346         37           42         Seaboard Marine         35,586         24           43         Meratus         32,734         51           44         Ningbo Ocean Shg Co         31,586         42           45         Tanto Intim Line         29,990         50           46         Linea Messina         28,070         11           47         Temas Line         26,197 </td <td>28</td> <td>Zhonggu Shipping</td> <td>60,240</td> <td>45</td>	28	Zhonggu Shipping	60,240	45
31 Transworld Group       50,071       30         32 Emirates Shipping Line       48,085       10         33 RCL (Regional Container L.)       48,021       25         34 Sinokor       46,298       39         35 NileDutch       44,049       14         36 Matson       43,049       26         37 Swire Shipping       42,894       29         38 Heung-A Shipping       40,950       35         39 Stream Line (Seatrade BV)       38,445       55         40 Salam Pasific       38,393       46         41 Samudera       37,346       37         42 Seaboard Marine       35,586       24         43 Meratus       32,734       51         44 Ningbo Ocean Shg Co       31,586       42         45 Tanto Intim Line       29,990       50         46 Linea Messina       28,070       11         47 Temas Line       26,197       34         48 Namsung Shipping       25,253       27         49 Shipping Corp. of India       21,078       5	29	UniFeeder	54,480	50
32       Emirates Shipping Line       48,085       10         33       RCL (Regional Container L.)       48,021       25         34       Sinokor       46,298       39         35       NileDutch       44,049       14         36       Matson       43,049       26         37       Swire Shipping       42,894       29         38       Heung-A Shipping       40,950       35         39       Stream Line (Seatrade BV)       38,445       55         40       Salam Pasific       38,393       46         41       Samudera       37,346       37         42       Seaboard Marine       35,586       24         43       Meratus       32,734       51         44       Ningbo Ocean Shg Co       31,586       42         45       Tanto Intim Line       29,990       50         46       Linea Messina       28,070       11         47       Temas Line       26,197       34         48       Namsung Shipping       25,253       27         49       Shipping Corp. of India       21,078       5	30	Grimaldi (Napoli)	50,622	42
33     RCL (Regional Container L.)     48,021     25       34     Sinokor     46,298     39       35     NileDutch     44,049     14       36     Matson     43,049     26       37     Swire Shipping     42,894     29       38     Heung-A Shipping     40,950     35       39     Stream Line (Seatrade BV)     38,445     55       40     Salam Pasific     38,393     46       41     Samudera     37,346     37       42     Seaboard Marine     35,586     24       43     Meratus     32,734     51       44     Ningbo Ocean Shg Co     31,586     42       45     Tanto Intim Line     29,990     50       46     Linea Messina     28,070     11       47     Temas Line     26,197     34       48     Namsung Shipping     25,253     27       49     Shipping Corp. of India     21,078     5	31	Transworld Group	50,071	30
34         Sinokor         46,298         39           35         NileDutch         44,049         14           36         Matson         43,049         26           37         Swire Shipping         42,894         29           38         Heung-A Shipping         40,950         35           39         Stream Line (Seatrade BV)         38,445         55           40         Salam Pasific         38,393         46           41         Samudera         37,346         37           42         Seaboard Marine         35,586         24           43         Meratus         32,734         51           44         Ningbo Ocean Shg Co         31,586         42           45         Tanto Intim Line         29,990         50           46         Linea Messina         28,070         11           47         Temas Line         26,197         34           48         Namsung Shipping         25,253         27           49         Shipping Corp. of India         21,078         5	32	Emirates Shipping Line	48,085	10
35         NileDutch         44,049         14           36         Matson         43,049         26           37         Swire Shipping         42,894         29           38         Heung-A Shipping         40,950         35           39         Stream Line (Seatrade BV)         38,445         55           40         Salam Pasific         38,393         46           41         Samudera         37,346         37           42         Seaboard Marine         35,586         24           43         Meratus         32,734         51           44         Ningbo Ocean Shg Co         31,586         42           45         Tanto Intim Line         29,990         50           46         Linea Messina         28,070         11           47         Temas Line         26,197         34           48         Namsung Shipping         25,253         27           49         Shipping Corp. of India         21,078         5	33	RCL (Regional Container L.)	48,021	25
36       Matson       43,049       26         37       Swire Shipping       42,894       29         38       Heung-A Shipping       40,950       35         39       Stream Line (Seatrade BV)       38,445       55         40       Salam Pasific       38,393       46         41       Samudera       37,346       37         42       Seaboard Marine       35,586       24         43       Meratus       32,734       51         44       Ningbo Ocean Shg Co       31,586       42         45       Tanto Intim Line       29,990       50         46       Linea Messina       28,070       11         47       Temas Line       26,197       34         48       Namsung Shipping       25,253       27         49       Shipping Corp. of India       21,078       5	34	Sinokor	46,298	39
37     Swire Shipping     42,894     29       38     Heung-A Shipping     40,950     35       39     Stream Line (Seatrade BV)     38,445     55       40     Salam Pasific     38,393     46       41     Samudera     37,346     37       42     Seaboard Marine     35,586     24       43     Meratus     32,734     51       44     Ningbo Ocean Shg Co     31,586     42       45     Tanto Intim Line     29,990     50       46     Linea Messina     28,070     11       47     Temas Line     26,197     34       48     Namsung Shipping     25,253     27       49     Shipping Corp. of India     21,078     5	35	NileDutch	44,049	14
38 Heung-A Shipping       40,950       35         39 Stream Line (Seatrade BV)       38,445       55         40 Salam Pasific       38,393       46         41 Samudera       37,346       37         42 Seaboard Marine       35,586       24         43 Meratus       32,734       51         44 Ningbo Ocean Shg Co       31,586       42         45 Tanto Intim Line       29,990       50         46 Linea Messina       28,070       11         47 Temas Line       26,197       34         48 Namsung Shipping       25,253       27         49 Shipping Corp. of India       21,078       5	36	Matson	43,049	26
39 Stream Line (Seatrade BV)     38,445     55       40 Salam Pasific     38,393     46       41 Samudera     37,346     37       42 Seaboard Marine     35,586     24       43 Meratus     32,734     51       44 Ningbo Ocean Shg Co     31,586     42       45 Tanto Intim Line     29,990     50       46 Linea Messina     28,070     11       47 Temas Line     26,197     34       48 Namsung Shipping     25,253     27       49 Shipping Corp. of India     21,078     5	37	Swire Shipping	42,894	29
40       Salam Pasific       38,393       46         41       Samudera       37,346       37         42       Seaboard Marine       35,586       24         43       Meratus       32,734       51         44       Ningbo Ocean Shg Co       31,586       42         45       Tanto Intim Line       29,990       50         46       Linea Messina       28,070       11         47       Temas Line       26,197       34         48       Namsung Shipping       25,253       27         49       Shipping Corp. of India       21,078       5	38	Heung-A Shipping	40,950	35
41       Samudera       37,346       37         42       Seaboard Marine       35,586       24         43       Meratus       32,734       51         44       Ningbo Ocean Shg Co       31,586       42         45       Tanto Intim Line       29,990       50         46       Linea Messina       28,070       11         47       Temas Line       26,197       34         48       Namsung Shipping       25,253       27         49       Shipping Corp. of India       21,078       5	39	Stream Line (Seatrade BV)	38,445	55
42       Seaboard Marine       35,586       24         43       Meratus       32,734       51         44       Ningbo Ocean Shg Co       31,586       42         45       Tanto Intim Line       29,990       50         46       Linea Messina       28,070       11         47       Temas Line       26,197       34         48       Namsung Shipping       25,253       27         49       Shipping Corp. of India       21,078       5	40	Salam Pasific	38,393	46
42     Seaboard Marine     35,586     24       43     Meratus     32,734     51       44     Ningbo Ocean Shg Co     31,586     42       45     Tanto Intim Line     29,990     50       46     Linea Messina     28,070     11       47     Temas Line     26,197     34       48     Namsung Shipping     25,253     27       49     Shipping Corp. of India     21,078     5	41	Samudera	37,346	37
44       Ningbo Ocean Shg Co       31,586       42         45       Tanto Intim Line       29,990       50         46       Linea Messina       28,070       11         47       Temas Line       26,197       34         48       Namsung Shipping       25,253       27         49       Shipping Corp. of India       21,078       5	42	Seaboard Marine		24
45 Tanto Intim Line       29,990       50         46 Linea Messina       28,070       11         47 Temas Line       26,197       34         48 Namsung Shipping       25,253       27         49 Shipping Corp. of India       21,078       5	43	Meratus	32,734	51
46       Linea Messina       28,070       11         47       Temas Line       26,197       34         48       Namsung Shipping       25,253       27         49       Shipping Corp. of India       21,078       5	44	Ningbo Ocean Shg Co	31,586	42
47 Temas Line     26,197     34       48 Namsung Shipping     25,253     27       49 Shipping Corp. of India     21,078     5	45	Tanto Intim Line	29,990	50
48 Namsung Shipping         25,253         27           49 Shipping Corp. of India         21,078         5	46	Linea Messina	28,070	11
48 Namsung Shipping         25,253         27           49 Shipping Corp. of India         21,078         5	47	Temas Line	26,197	34
49 Shipping Corp. of India 21,078 5	48			27
	49		21,078	5
	50		19,212	11

#### Global/ Regional International Feeder:

- Xpress Feeder
- PIL/ ACL
- RCL (Regional Container Line)
- Samudera
- Simatech
- Arkas

#### Domestic Feeder:

- Salam Pacific/ SPIL
- Meratus
- Tanto Intim Line
- Samudera
- Temas Line



<sup>\*</sup> Alphaliner

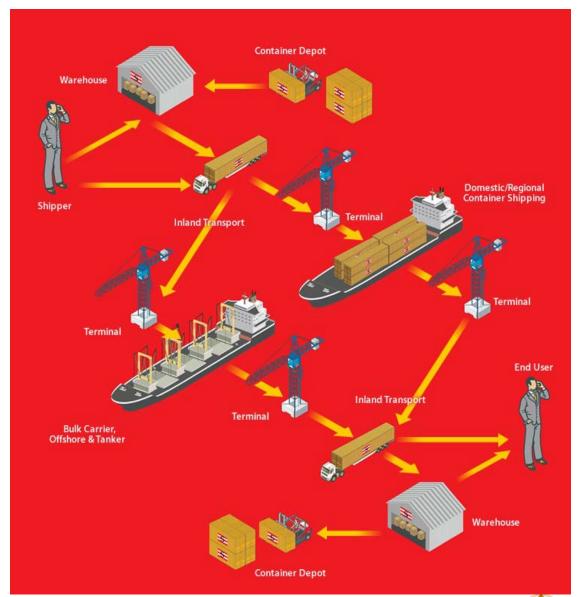


Samudera Indonesia Group as Regional Feeder & Domestic Feeder Operator

## Samudera Indonesia Group Background



Samudera Indonesia is an integrated cargo transportation and logistics company established in 1964.





### Samudera Regional Feeder

# Samudera Shipping Line Ltd. Regional Shipping arm listed in Singapore Stock Exchange main board

- Consistence container t'put last few years: 1.3 million teu
- Majority Container Business: Feeder/ SOC (Shipper Owned Container)
- Operate 25 Container Vessel From 241 teus 2,664 teus
- Area coverage: Far East up to Persian Gulf





### Samudera Domestic Shipping Arm (Indonesia)



#### Indonesia Domestic Shipping arm. (PT Perusahaan Pelayaran Panurjwan)

- One of the main operator on the Indonesia domestic shipping
- Mixed container business portfolio between SOC/ Shipper Owned Container and COC/ Carrier Owned Container
- Operate 12 Container Vessel
- Area coverage Western Indonesia to Eastern Indonesia







Feeder Outlook & SSL Development

### Feeder Outlook & Samudera Feeder Development

Samudera is in opinion the feeder industry is still needed for shipping industry and port industry development be it by providing efficiency, frequency as well as market penetration

- Samudera Shipping Line Regional Feeder Development
  - Expanding into niche port in Asia (i.e. Songkhla in Thailand, Sihanoukville in Cambodia etc.)
  - Expanding the hub operation
- Samudera Shipping Line Domestic Shipping
  - Domestic Shipping in Thailand (Bangkok river port to Laem Chabang)
  - Domestic Shipping in India (East Coast of India domestic Shipping)



# Thank You

#### THE 30th IAPH WORLD PORTS CONFERENCE

7 - 12 May 2017, Bali Nusa Dua Convention Center, Bali - Indonesia











