Comments of the

World Shipping Council

Submitted to the

Competition and Consumer Commission of Singapore

In the matter of

Proposed Recommendation for the Block Exemption Order for Liner Shipping Agreements

3 August 2021

Table of Contents

The World Shipping Council ("WSC") respectfully submits these comments in response to the Competition and Consumer Commission of Singapore's ("CCCS") Proposed Recommendation for the Block Exemption Order for Liner Shipping Agreements, released on 14 July 2021 ("CCCS Proposal").

Statement of Interest

WSC is a non-profit trade association with offices in Singapore, Brussels, and Washington, DC that represents the liner shipping industry, which is comprised of operators of containerships and roll-on/roll-off vessels (including vehicle carriers). Together, WSC's 19 ocean carrier members operate approximately 90% of the world's liner vessel services. They have invested hundreds of billions of dollars in ships, port terminals, and related infrastructure in order to ensure a wide variety of competitive options continue to exist for safe, dependable, and economical international ocean transportation of cargo. A number of WSC's members provide substantial ocean transportation service to and from Singapore. More information about WSC may be found at www.worldshipping.org. As a trade association that represents the international liner shipping industry on important legal, regulatory, and policy matters, WSC and its members have a direct interest in the CCCS Proposal.

Summary of Major Points

Liner shipping companies are the engines of international trade, providing regularly scheduled ocean transportation service at key ports for essential manufactured goods, consumer products, raw materials, and agricultural commodities worldwide. These services, which connect thousands of ports worldwide at very low cost, are of vital significance to national economies, importers and exporters, manufacturers, and consumers. For many years, both globally and in Singapore, the liner industry has relied on various forms of cooperative agreements as critical tools for maintaining and expanding service options, reducing costs, and maximizing efficiency.

Singapore has provided a block exemption to Liner Shipping Agreements ("LSAs") under Section 36 of the Competition Act (Cap. 50B) (the "Competition Act") since 2006, shortly after the Act became effective. The Block Exemption Order for LSAs ("BEO") issued in 2006 was carefully reviewed by the CCCS and renewed by the Minister for Trade and Industry ("Minister") in 2010, 2015 and 2020, following direct stakeholder engagement, public consultation processes, and consideration of CCCS-commissioned consultancy studies.[1] The CCCS' most recent recommendation last August was to extend the BEO for a period of one year until 31 December 2021, ensuring that there was no disruption to the BEO or to liner services to and from Singapore during the COVID-19 pandemic.[2]

[1] No. S 420, Competition Act, Competition (Block Exemption for Liner Shipping Agreements) Order 2006; No. S 768, Competition Act, Competition (Block Exemption for Liner Shipping Agreements) (Amendment) Order 2010; No. S 718, Competition Act, Competition (Block Exemption for Liner Shipping Agreements) (Amendment) Order 2015; No. S 705, Competition Act, Competition (Block Exemption for Liner Shipping Agreements) (Amendment) Order 2020.

[2] *See* CCCS Proposal at Para 2, note 4.

Singapore's current BEO, which is set to expire at the end of this year, broadly covers both ratemaking and operational agreements. The BEO exempts LSAs regarding "price" from the prohibitions in Section 34 of its Act, as long as those agreements comply with certain administrative requirements.[3] The term "price" is defined broadly to include any rate or charge "incidental to or reasonably connected with" the provision of liner services.[4] The BEO also exempts agreements regarding "technical, operational, or commercial arrangements." Recognizing that the structure, duration, and geographic scope of these agreements varies according to the needs of the carriers seeking to offer service to a particular market, this term is designed to exempt various types of non-ratemaking agreements like vessel sharing agreements ("VSAs"), slot charter agreements, and slot exchange agreements. The CCCS determined that it was "desirable to have a BEO that allows liner operators participating in all forms of liner shipping to collaborate to bring about technical, operational, and commercial improvements in their services."[5]

In the current consultation, the CCCS has found that LSAs continue to generate net economic benefits under the block exemption standards in the Act and has proposed to recommend a renewed BEO for three years for: (1) VSAs, and (2) price discussion agreements for feeder services. WSC fully supports the CCCS Proposal to extend the VSA exemption, but requests that the CCCS reconsider extending the term of the VSA exemption for an additional five (5) years, as has been Singapore's practice. WSC has communicated to the CCCS that ocean carriers serving the long haul ocean trades have not participated in price discussion agreements for several years, and therefore the international liner shipping industry was not requesting a renewal of the price discussion portion of the current BEO. Therefore, WSC has no policy position on the CCCS Proposal to extend the price discussion agreement exemption for feeder services, or what an appropriate definition for feeder services should be under the BEO.

WSC provides its comments to the specific questions raised in the CCCS Proposal below. As the CCCS has asked stakeholders to provide reasoned explanations for any views on its Proposal, including any supporting material that provides additional factual and economic support, WSC has retained RBB Economics, a global consulting firm specializing in competition economics with particular expertise in the liner shipping sector, to provide an independent report to supplement the WSC submission. RBB Economics has provided similar reports to Governments in the European Union, Australia, and India, as those countries were reviewing their VSA competition law exemptions. The RBB Report, attached as Appendix A hereto, includes data, statistics, and analyses on the Singapore liner shipping market demonstrating the public benefits and economic efficiencies of VSAs.

---

[3] *See* BEO at Para. 5.

[4] See *id.* at Para. 3(1).

[5] *See* CCS Explanatory Note on the Competition Block Exemption for Liner Shipping Agreements Order 2006, at Para. 43 (rel. July 12, 2006).

Comments and Responses to Questions

A. *What are your views on the proposal to extend the BEO in respect of vessel sharing agreements?*

WSC strongly supports the CCCS Proposal to extend the BEO in respect of VSAs. In its Proposal, the CCCS has determined—and WSC agrees—that VSAs continue to fulfil the net economic benefit criteria set out in Section 41 of the Act, as they contribute to improving production or distribution, and promote technical and economic progress.[6] Specifically, the CCCS has found that VSAs, without imposing any unnecessary restrictions or having any adverse impact on competition: [7]

(1) improve the connectivity of Singapore's port, increase the utilization of space on vessels, and allow liners to operate at a lower cost than if each liner were to operate on its own and to provide services using vessels operated by other liners, all of which enables the provision of more frequent services in and out of Singapore across more trade routes.[8]

(2) enhance competition among liners, by allowing smaller liners to provide services on trade routes and at frequencies which they are otherwise not able to provide on their own due to lack of scale; and [9]

(3) contribute to improving the production of liner shipping services in Singapore.[10]

WSC provides the following more detailed comments in support of the CCCS Proposal and findings above with respect to VSAs.

1. VSAs Are a Longstanding and Integral Part of the Liner Shipping Industry Worldwide.

The primary requirement for a ship operator to provide liner shipping services, or to maintain and improve ongoing regular service to existing geographies, is the enormous capital investment required for ships and equipment. VSAs and other forms of operational agreements are used for the purpose of sharing vessel assets. They have existed for decades and are a fundamental tool used by carriers to effectively and efficiently deploy their ships and equipment once the capital investment is made. In a traditional VSA, two or more carriers each agree to provide a specified number of ships in order to operate a service(s) that serves a particular

[6] CCCS Proposal at Paras. 1 and 5.

[7] See *id.* at Paras. 10-14.

[8] See *id.* at Para. 7.

[9] See *id.* at Para. 8.

[10] See *id.* at Para. 9.

trade(s). These types of agreements are particularly useful for carriers wanting to enter new geographies or continue to serve geographies with smaller cargo volume.

As the CCCS well knows from its many years of experience with VSAs, they are purely operational agreements that allow participating ocean carriers to provide improved service to their customers at lower cost. Importantly, there is no engagement between VSA partners on rates, charges or commercial issues, and any carrier that is a party to a VSA decides its own commercial strategies independently and competes on pricing and level of service towards customers. Even where carriers are parties to the same VSA, the level of cooperation is limited such that there remains every incentive to compete. In this regard, information shared among parties to a VSA is limited to the operational information necessary for the functioning of the agreements. Vessel deployments are agreed upon only to the extent necessary for the efficient joint operation of VSAs and to adapt to current supply and demand conditions, but otherwise, carriers make individual decisions as to investment and continue to manage freely their capacity. They are therefore able, and have the incentive, to increase capacity necessary to meet customer demand.

The CCCS has already found that VSAs offer significant and well-documented benefits to carriers and their customers. VSAs lower barriers to entry and expansion; they increase the number of port-pair combinations that any individual carrier could offer; they increase price competition for any given port pair; they enable the more efficient deployment of right-sized vessels; they enable carriers to use larger and more efficient vessels in appropriate trades; they reduce unit costs; they enable a better calibration of capacity to market conditions; they improve responsiveness to changes in market requirements; they produce environmental benefits by reducing emissions; they broaden service networks for individual carriers, especially regional ones, and therefore allow carriers to offer better and more choices for customers, with enhanced product quality and reliability. For all these reasons, VSAs remain essential to carriers, their customers, and the competitiveness of Singapore's port industry.

Consistent with the findings in the CCCS Proposal, RBB Economics explains the key public benefit of VSAs in its Report, stating:

> "Consortia and other cooperation agreements result in benefits to customers as cooperation between carriers allows for both (a) the generation of efficiencies through using larger vessels whilst at the same time allowing for more services with a regular frequency and (b) shipping lines to offer services where they would not have the scale to do so on their own."[11]

To expand on this point, under the current regulatory regime in Singapore and every major trading nation around the world, new entrants, or smaller carriers, in particular, have the ability to partner with other carriers, some of which will have larger, broader networks, in order to expand the services that the new entrant or the smaller carrier can offer to a customer. Similarly, when a carrier offers a niche service, perhaps with some unique port calls, it is able to

[11] RBB Report, at Section 3.3.

share some of its capacity with its VSA partners that might seek to offer service to those ports, thereby creating additional service and competition in that geography. Without that ability, service to smaller ports, regions or countries could be at risk. VSAs also facilitate more frequent and competitive services on "long, thin" trades, meaning those routes that involve long distances but relatively low cargo volumes.

In addition to allowing carriers to maintain more services to smaller trades and ports, VSAs support more efficient services on high-volume trades, especially those trades that accommodate larger vessels. Those larger vessels are more efficient – economically and environmentally – on a per-unit basis. However, because the unit of supply for containerized liner shipping is a group or "string" of multiple ships needed to maintain a fixed weekly sailing schedule (typically 10-12 ships in the Asia/North Europe trades), it is challenging for a single carrier to fill that much capacity by itself on each voyage. Vessel sharing in this context allows the use of the most efficient ships by spreading that capacity over enough carriers to make sure that the ships are reasonably full, thus allowing the efficiencies to be realized.

For all these reasons, the ability to share space has been critical to carriers' ability to provide frequent, reliable services to their customers at reasonable cost. The importance of vessel sharing will continue as global trade increases in volume and scope.[12]

2. Singapore is a Premier Global Hub Port, Its Trade is Growing, and VSAs are Vital to Support that Growth.

Liner shipping services connect Singapore's importers and exporters to other markets worldwide. These services and this connectivity have been developed in Singapore and worldwide based substantially upon ocean carriers' ability to share space on each other's vessels and coordinate their services through VSAs. Singapore remains one of the world's largest and busiest ports and, according to the RBB Report, Singapore's trade to GDP ratio is 320.5% while the world average is 60% for 2020.[13] According to the United Nations Conference on Trade and Development ("UNCTAD"), between 2010 and 2019, the annual throughput of containers in the Port of Singapore increased from 29.1 million to 38.0 million TEU[14] representing a 30.3% growth in this period.[15]

---

[12] The RBB Report provides further analysis showing the impact of VSAs on service quality. The Report (at Appendix A) presents and discusses a conceptual example to illustrate that the absence of VSAs would have a negative impact on service quality because – absent consolidation – carriers would need to reduce service frequencies in order to maintain utilization or otherwise switch to smaller vessels incurring significant costs and result in upward pressure on pricing. Based on this analysis, RBB concludes that "moving from the current market structure with consortia to a market structure without consortia would result in a severe reduction in the quality of service offered. The opposite is also true: consortia contribute to a higher level of services provided when compared to a counterfactual in which firms would not be allowed to cooperate."

[13] *Id.* at Section 2.1.

[14] A TEU is a twenty-foot equivalent container unit. Most containers are 40 feet in length equating to two TEU.

[15] https://unctadstat.unctad.org/wds/TableViewer/tableView.aspx?ReportId=13321.

Supported by their participation in VSAs, ocean carriers have responded to this growth in Singapore over the years. As reflected in the RBB Report, according to data from London-based Drewry Maritime, 27 carriers currently offer 101 weekly services to and from Singapore, and roughly 80 percent of these services are offered through VSAs. Moreover, since the last time the VSA exemption was renewed for a full five year period in Singapore (2015), Drewry reports that the average capacity of the vessels employed on these services has increased significantly from 8,144 TEU to 11,135 TEU, an increase of over 25%. The total number of vessels deployed has also increased from 710 to 844, and the total number of port calls has increased from 157 to 161.[16] This data not only shows that importers and exporters have numerous competitive choices, and more service choices on larger vessels than they did five years ago. It also demonstrates that carriers are meeting the growing demands of these importers and exporters in Singapore, which has enabled the annual growth of the country's total container throughput.

UNCTAD has also developed a Liner Shipping Connectivity Index (LSCI), which shows the integration level of countries to global liner shipping networks. A country's LSCI score is composed of six components: (1) the number of ships servicing a country, (2) the total container-carrying capacity of the ships, (3) the maximum vessel size used on these services (measured in TEU), (4) the number of services connecting a country to other countries, (5) the number of companies that deploy container ships on services from and to a country's ports, and (6) the number of other countries that are connected to the country through direct liner shipping services. The higher a score is on the index, the higher the integration of a given country to liner shipping networks. Singapore's LSCI score has been either the second or third highest overall of any country since the Fourth Quarter of 2006 (i.e., since the first BEO for VSAs was adopted).[17] This score confirms Singapore's position as one of the world's premier global hub port, and also demonstrates that carriers have been able to utilize VSAs to expand their services and maintain Singapore's overall connectivity to global networks. It is also noteworthy that the majority of other countries in the top 30 of UNCTAD's LSCI index are countries that also have longstanding exemptions for VSAs, including China, South Korea, the United States, Malaysia, Hong Kong, Japan, and several European Union ("EU") Member States.

3. Continued International Support for VSA Exemptions.

As liner shipping is by definition an international business, the CCCS has repeatedly found that it is important to consider the broader regulatory environment for VSAs in the context of a renewal of its exemption. In issuing its first BEO back in 2006, the then-CCS recognized that "[e]xemptions from certain provisions of competition law have long been a feature of the liner industry in major jurisdictions around the world."[18] In making its decision to renew its exemption in 2010, the CCS noted that "antitrust exemptions remain the regulatory norm for the liner industry globally, and for most of Singapore's trading partners," and "will provide continued

[16] RBB Report at Section 3.2.1.

[17] See *id.* at Section 2.4 (citing https://unctadstat.unctad.org/wds/TableViewer/tableView.aspx?ReportId=92).

[18] CCS BEO Explanatory Note at Para. 7.

certainty to the shipping industry."[19] The same remains true today. Given the clear benefits of VSAs for carriers and importers and exporters alike, there continues to be overwhelming international support for allowing VSAs. Among Singapore's major trading partners, the EU, Japan, Singapore, Hong Kong, China, Malaysia, South Korea, Australia, and the United States all have exemptions for VSAs.[20] Since Singapore's last five-year renewal of its exemption in 2015, several jurisdictions have reconfirmed their support for VSAs by renewing their longstanding exemptions.

The EU, for example, renewed in 2020 its consortia (i.e., VSA) exemption through April 2024. The EU block exemption regulation provides that consortia "generally help to improve the productivity and quality of available liner shipping services by reason of the rationalization they bring to the activities of member companies and through the economies of scale they allow in the operation of vessels and utilization of port facilities. They also help to promote technical and economic progress by facilitating and encouraging greater utilization of containers and more efficient use of vessel capacity."[21]

Similarly, the block exemption for VSAs was renewed in Malaysia in July 2019 for an additional period of three years. Malaysia, like Singapore, is a major transshipment hub in Asia and a key Southeast Asian competitor for carrier services.[22] In its initial decision to grant a block exemption in 2014, the Malaysia Competition Commission ("MyCC") noted there are "significant identifiable efficiency benefits arising from VSAs."[23] The Commission noted that "high investment in vessels and operating costs for services require the need to have cooperation between liner operators to maintain the quality of services that is able to meet frequency and regularity which are the defining characteristics of scheduled shipping services for the benefit of the industry, including shippers."[24] The MyCC also noted that operational agreements "enable the liner shipping industry to continue investing billions of dollars in ships, new vessel services, equipment, infrastructure, information technology and other technological innovations in order

---

[19] *See* CCS Response to Public Consultation of September 2010 on Proposed Recommendations to Minister With Respect to Block Exemption Order for Liner Shipping Agreements at Para. 3 (rel. September 14, 2010).

[20] India has also had a VSA exemption since 2013, and the Government is in the process of reviewing a renewal of that exemption.

[21] Commission Regulation (EC) No 906/2009 of 28 September 2009 on the application of Article 81(3) of the Treaty to certain categories of agreements, decisions and concerted practices between liner shipping companies (consortia) at Para 5.

[22] *See* CCCS Proposal at Para. 7 ("Given the size of the domestic economy, Singapore is not a major port of origin or destination unlike other major ports. Indeed, a very large proportion of Singapore's container cargo throughput involves transhipment.").

[23] Malaysia Competition Commission, Explanatory Note, Competition (Block Exemption for Vessel Sharing Agreements and Voluntary Discussion Agreements in Respect of Liner Shipping) Order 2013 at Para. 1.3(a).

[24] *Id.*

to be able to continue providing liner shipping services. Scheduled and regular services cannot be provided at lower costs and regularity unless there is an agreement between competitors. These benefits could not have been provided unless there are agreements in place between liner operators."[25]

Finally, like Singapore, Australia is in the process of reviewing its longstanding liner exemption. While that review was temporarily paused last year due to COVID-19, the Australia Competition and Consumer Commission ("ACCC") released a Discussion Paper in December 2019, noting its preliminary views that a class exemption for VSAs would "improve the service supplied to cargo owners with a low risk of substantially lessening competition."[26]

4. The Liner Industry is Highly Competitive and VSAs Promote Competition.

Since it was first adopted in 2006, the Singapore BEO has worked remarkably well. Each time the CCCS has reviewed its exemption, it has found that VSAs continue to fulfil the exemption criteria in the Act, and the data in the RBB Report discussed above supports that all these findings remain true today.

As a threshold matter, despite a period of some consolidation in recent years, the liner industry "remains highly competitive, and the shipping market in Singapore remains healthy."[27] According to Alphaliner, even the largest ocean carrier as of July 2021 has only 16.9% of total worldwide capacity. Combined, the top five carriers have less than 65% of the world's fleet capacity.[28] The RBB Report further demonstrates that the largest ocean carrier in the Singapore ocean trades has only a 15.7% market share, and that there are ten carriers in the Singapore trades with market shares between approximately 4-15%. Another 11% of the Singapore market is served by smaller carriers, including intracontinental feeder services.[29] This is strong evidence that both the global and Singapore markets remain fragmented and are not close to a point where even the leading companies could maintain their level of service individually.

Indeed, VSAs continue to promote competition. Through VSAs, carriers can offer more services in more trades to more ports on newer, larger and more efficient ships. Competition among carriers in any given VSA also remains vigorous. Carriers operating in VSAs are not precluded from operating other services or entering into other cooperation agreements with other carriers. VSAs are designed, and are operated, to increase efficiency and expand service offerings, not to limit flexibility or competition. As noted above, carriers participating in a single

---

[25] *Id.* at Para. 1.3(b).

[26] https://www.accc.gov.au/system/files/public-registers/documents/ACCC%20discussion%20paper%20-%20ocean%20liner%20shipping%20class%20exemption.pdf.

[27] RBB Report at Section 3.2.1.

[28] Alphaliner, Top 100 Carriers, (July 27, 2021), *available at* https://alphaliner.axsmarine.com/PublicTop100/.

[29] RBB Report at Section 3.2.3.

VSA continue to compete on price, marketing, customer service, logistics/inland transportation, and overall global networks. Different VSAs compete on network coverage, efficiency, service frequency, and reliability. All this competition ultimately benefits the carriers' customers.

As the EU found when it renewed its VSA exemption last year, "[a]rguments that the high concentration level in the industry harms customers remain unsubstantiated as competition in the industry seems to function well, transferring a fair share of cost savings to customers in the form of lower prices and keeping the quality of services stable. In the circumstances the consortia Block Exemption Regulation remains relevant, facilitating types of cooperation that generate efficiency gains and benefit customers."[30]

The RBB Report provides additional economic support that shows VSAs do not lessen competition. The RBB Report provides two graphs summarizing the development of spot rates for two major destinations relevant to Singapore: Singapore to Rotterdam in the Netherlands and Singapore to Los Angeles in the US between July 2008 and January 2021. The data shows that spot rates in 2020 are essentially the same as they were in 2008, which if one accounts for inflation means that rates have decreased in real terms over time. RBB concludes that "[i]t is evident from the graphs that prices fluctuate over time but, until 2020, prices move within similar price bands throughout the period."[31] The graphs show that rates have increased in 2021. RBB explains its reasoning for this as follows:

> "The sharp increase in prices shown in the second half of 2020 is clearly due to the extraordinary impact of the Covid-19 pandemic on the shipping industry in general and global trade overall. The onset of the pandemic created an initial sharp contraction in volumes shipped at the start of 2020, but was followed by an unprecedented surge resulting from an increase in demand that far outstripped, and continues to outstrip, the available supply of carrier capacity in the market."[32]

RBB draws four important conclusions regarding these current market conditions that are relevant to the CCCS Proposal. First, "[p]rices for container shipping are driven by the balance of demand and supply, and a shortage of supply results in higher prices." Second, "LSAs have not and could not have contributed to this shock in the shipping industry. In fact, all carriers, including those in LSAs, continue to employ as much capacity in the market as they can." Third, "this is a worldwide phenomenon that is not specific to Singapore." Finally, "one can reasonably expect that prices will adapt and normalize as the supply-demand balance normalizes, particularly as the dramatic spike in demand, and resulting bottlenecks, subsides."[33]

---

[30] Commission Staff Working Document – Evaluation of the Commission Regulation (EC) No 906/2009 of 28 September 2009 on the application of the Treaty to certain categories of agreements, decisions and concerted practices between liner shipping companies (consortia), 20 November 2019.

[31] RBB Report at Section 2.3.

[32] *Id.*

[33] *Id.*

The RBB, Alphaliner, and Drewry data and analysis all reinforce the fact that the global and Singaporean liner markets are highly competitive, and that VSAs have helped to preserve competition by allowing numerous competitors—particularly small and medium size carriers—to participate in markets that they otherwise would not be able to on their own.

B. *__What are your views on the proposal to extend the BEO in respect of price discussion agreements for feeder services?__*

WSC has communicated to the CCCS that main ocean carriers serving the long haul ocean trades have not participated in any form of price discussion agreements for several years.[34] Given the carriers' preference in recent years to handle commercial issues independently, and the trend among global regulators to remove or limit competition law exemptions that allow carriers to discuss and coordinate on prices, many liner operators chose to withdraw from any participation in price discussion agreements. Few (if any) liner conferences or so-called "voluntary discussion agreements" among main carriers continue to operate globally or in Singapore. Thus, for practical reasons, the legal protections provided by the current BEO to price discussion agreements are no longer necessary.

The international liner shipping industry therefore is not seeking a renewal of the price discussion portion of the BEO. WSC has no policy position on the CCCS Proposal to extend the price discussion agreement exemption for feeder services.

C. *__What are your views on the proposed period of extension of the BEO (i.e. an extension of 3 years until 31 December 2024)?__*

The CCCS Proposal recommends an extension of the BEO for a term of three years from 1 January 2022 to 31 December 2024. The Proposal notes that such an extension "ensures that the BEO continues to remain relevant and current to the liner shipping industry," and "also allows CCCS to keep a close watch on developments in the shipping industry and international regulatory developments."[35] The CCCS also said that an extension of three years is "comparable to block exemption orders for LSAs in other jurisdictions."[36] While WSC is pleased that the CCCS has recommended a longer-term exemption than just one year, WSC believes the CCCS should reconsider whether a five-year exemption renewal (as in 2010 and 2015) would be more consistent with best international practices, and would be more beneficial to all stakeholders, including ocean carriers, importers and exporters, and Singapore trade.

---

[34] See CCCS Proposal at Para. 16.

[35] *Id.* at Para. 25.

[36] *Id.*

First, Singapore now has over 15 years' experience with a VSA exemption, all with positive results. The CCCS has consistently found over the years that VSAs improve connectivity and service, enhance competition among ocean carriers, and offer considerable benefits to the Singapore economy as a whole. Moreover, for a VSA to be exempted under the BEO, it has to comply with conditions that facilitate individual private contracting for liners' own service arrangements with their customers.[37] Thus, the model of extending the VSA exemption for a period of five years has shown to work well, and over a 15-year span, the CCCS has been able to maintain a "close watch" on VSAs and developments in the industry.

Second, a longer-term exemption is consistent with other countries' VSA exemptions which have found that the need for and benefits of the VSA exemption are not short-term. Indeed, the great majority of countries do not place any term limits on their VSA exemptions, including China, Japan, and the United States.

Finally, a longer-term exemption would benefit both Singapore and the carrier industry. A five-year exemption would provide the Government a reasonable period of time in which to meaningfully review further experience under the exemption, while still being able to monitor VSAs on a continuous basis. It would also make sense for the VSAs and the liner shipping industry, by providing an exemption of a sufficient duration that will provide the legal certainty to allow carriers to plan well in advance and make the necessary long-term investments in vessels and equipment to ensure the benefits of these important agreements are realized. A longer exemption term would provide certainty and stability of regulatory policies to an industry that is critical to the Singapore import and export community. Back in 2006, the then-CCS agreed that providing legal certainty was a key reason for adopting a five-year exemption.[38] The CCS repeated the importance of stability in its five-year renewal in 2015.[39] WSC submits that the need for this stability is as important, if not more important, today than it was when the CCCS adopted those previous five-year BEOs.

D. *<u>What are your views on the appropriate definition of feeder services in the BEO?</u>*

WSC has no policy position on what an appropriate definition for feeder services should be in the BEO.

---

[37] *Id.* at Para. 10.

[38] *See* CCS Explanatory Note on the Competition Block Exemption for Liner Shipping Agreements Order 2006, at Para. 9 (rel. July 12, 2006) ("Such a block exemption will provide certainty to the shipping industry.").

[39] CCS's Response to the Public Consultation of May 2015 on the Proposed Recommendation to the Minister on the Competition (Block Exemption for Liner Shipping Agreements) Order, November 25, 2015, at Para. 3 (agreeing with commenters' views that VSAs "help to avoid market instability that characterise trades without such agreements, provide liners with the stability necessary to commit to long term investments, thereby facilitating improved decision-making, more efficient use of cargo capacity, and maintenance of a range of services.").

E. *What are your views on the impact of the proposed recommendation on your business — would you say it has a positive, negative, or neutral impact? Why?*

As a trade association, WSC is not itself a market participant. WSC files these comments on behalf of its ocean carrier members and the international liner shipping industry. For the reasons stated in response to Question A above, the CCCS Proposal to extend the VSA exemption will have an overwhelmingly positive impact on WSC members' businesses.

F. *Do you have any other comments on the proposed recommendation?*

On 28 August 2020, the Minister extended the BEO in its current form for one year in view of the highly uncertain times brought about by the COVID-19 pandemic. The CCCS noted that it would be necessary to review the impact of VSAs in an evolving market during a pandemic and take the necessary time to study the benefits of VSAs in both the short and long-term.

As noted above, as a result of COVID-19, there was a stark drop in global demand in the first half of 2020, quickly replaced by an unprecedented and continuing surge in demand that started in the third quarter of last year. This demand spike led to numerous issues like port congestion and a lack of available tonnage and equipment in some markets. Inland congestion has impacted ports worldwide due to lack of trucks, railcars, and storage space. In addition to the high cargo volumes, congestion has increased due to factors like a lack of qualified labor from illness or quarantine and necessary COVID-19 protocols.[40]

In the context of the CCCS Proposal to extend the VSA exemption, WSC believes it is important to consider the following as it relates to current market conditions. First, VSAs have been extremely important during times of high demand for vessel capacity. These arrangements ensure that all available slots are used even when an individual operator does not have sufficient demand from its customers for a particular sailing. With a VSA, any excess capacity can be made available to a carrier's VSA partners to offer to their respective customers.

Second, VSAs have allowed ocean carriers to respond quickly and effectively to these unprecedented market developments in several ways. Carriers have deployed all available vessel tonnage in an effort to meet current demand. The RBB Report notes that, as of 1 March 2021, an Alphaliner survey counted the inactive fleet at 190 ships, representing only 2.9% of the global cellular fleet capacity and found that 110 of those represent ships in shipyards undergoing maintenance, repairs, and retrofits.[41] Carriers have worked with their VSA partners to shift capacity to high-demand trades where it is needed most, resulting in higher vessel utilization. Carriers have introduced new strings and extra loaders/"sweeper" vessels, and shared that additional capacity with their VSA partners.

[40] See RBB Report at Section 2.3.

[41] See *id.* at Section 2.3 (citing Alphaliner Weekly Newsletter 2021-10, page 5).,

Finally, notwithstanding the challenges that all levels of the supply chain are facing in the current market environment, history shows that this situation is temporary, and the markets will stabilize. Consumer behaviour is expected to normalize as lockdowns ease over the course of this and next year. More than anything, the global supply chain needs stability and flexibility from governments. All actors need to know that the regulatory frameworks in place are stable and functioning. In Singapore, and worldwide, the regulatory processes for VSAs should be based on the norm, not an exceptional situation. WSC is pleased that the CCCS agrees with this view.

Conclusion

WSC strongly supports the CCCS Proposal to renew Singapore's broad exemption for VSAs and appreciates the CCCS' consideration of these comments and accompanying RBB Report on this important issue. It hopes that the Government will adopt the CCCS Proposal, while giving additional consideration to supporting a five-year extension as it has done in previous reviews.

RBB | Economics

Exemption for Liner Shipping Agreements - Submission to the Competition and Consumer Commission of Singapore

Prepared at the request of the World Shipping Council

RBB Economics, 27 July 2021

Contents

1 Introduction

On 14 July 2021, the Competition and Consumer Commission of Singapore (CCCS) requested comments on its proposed recommendation to the Ministry for Trade and Industry to renew the Block Exemption Order for Liner Shipping Agreements (hereafter, the "BEO").

The current BEO broadly exempts carrier price and operational agreements from section 34 of the Competition Act, collectively defined in the BEO as "liner shipping agreements" (LSAs). The BEO exempts liner shipping agreements regarding "price" from the prohibitions in Section 34 of its Competition Act, as long as those agreements comply with certain administrative requirements.[1]

The term "price" is defined broadly to include any rate or charge "incidental to or reasonably connected with" the provision of liner services.[2] The BEO also exempts agreements regarding "technical, operational, or commercial arrangements." This exempts various types of non-ratemaking/operational agreements like vessel sharing agreements that allow carriers to cooperate and share vessels in the provision of liner shipping services.

The CCCS has previously determined that it is "desirable to have a BEO that allows liner operators participating in all forms of liner shipping to collaborate to bring about technical, operational, and commercial improvements in their services."[3]

The BEO has been in place in Singapore since 2006 and has been extended 3 times. The current BEO is due to expire on 31 December 2021. In its proposed recommendation to the Minister, the CCCS has recommended a broad extension of the BEO for operational agreements like VSAs, and a more limited exemption price discussion agreements among regional feeder operators. It is our understanding that the CCCS is engaged in a public consultation on this recommendation, and will evaluate and make a recommendation to the Ministry for Trade and Industry on whether to proceed with its recommendation to renew the exemption.

The World Shipping Council (WSC) is a trade association representing the liner shipping sector, and its members represent 90% of global liner vessel capacity. We understand that WSC has indicated to the CCCS already that it is not seeking a renewal of the exemption for price agreements on behalf of its members, since they no longer participate in any such agreements. Instead, WSC fully supports renewal of the VSA portion of the BEO, and has asked RBB Economics to prepare this report as part of the WSC's submissions to the CCCS regarding renewal of that portion of the BEO.

---

1 *See* No. S 420, Competition Act, Competition (Block Exemption for Liner Shipping Agreement) Order 2006; No. S 768, Competition Act, Competition (Block Exemption for Liner Shipping Agreement) Amendment Order 2010; No S 718, Competition Act, Competition (Block Exemption for Liner Shipping Agreement) Amendment Order 2015, Para. 5.

2 See *id*. at Para. 3(1).

3 See CCS Explanatory Note on the Competition Block Exemption for Liner Shipping Agreements Order 2006, at Para. 43 (rel. July 12, 2006).

RBB Economics is a consulting firm specialising in competition economics. RBB is active on a global basis and has offices in Europe, South Africa and Australia. RBB has broad experience in the liner shipping sector.

Reports of RBB have been submitted to the European Commission (EC or the Commission), the Australian Competition and Consumer Commission (ACCC) and the Central Government of India as part of the WSC's responses to, respectively (1) the Commission's consultation on the EU Consortia Block Exemption Regulation for cooperation agreements in the liner shipping sector, (2) the ACCC Discussion Paper on the competition law exemption for ocean liner shipping as included in the Australian Competition and Consumers Act and (3) the Central Government of India's consideration on the renewal of its exemption for Vessel Sharing Agreements.

These consultations touched upon similar public interest considerations that the CCCS will likely consider when deciding whether to continue to exempt LSAs.

Based on the input received during the consultation, DG Competition of the EC decided to prolong the Consortia Block Exemption Regulation on 20 March 2020 for a period of 4 years. The review by the ACCC has been put on hold due to the Covid-19 crisis and remains pending, but the ACCC has indicated that the adoption of a class exemption for vessel sharing agreements would "*improve the service supplied to cargo owners with a low risk of substantially lessening competition"*. The Central Government of India's decision on the renewal of its exemption for Vessel Sharing Agreements is pending.

The remainder of this report is structured as follows:

- In Section 2 we discuss general market developments and statistics relating to the Singaporean market.
- Section 3 looks at the liner shipping services relevant to Singapore more specifically and illustrate the relevance of cooperation between carriers on service quality.
- We draw conclusions in Section 4 of this report.
- In Annex A we discuss a stylized example of cooperation within LSAs.
- Annex B includes a comprehensive overview of the carriers and the shipping services with port calls in Singapore.

2 Singapore – market developments

2.1 Introduction

Ocean liner shipping services connect Singaporean importers and exporters to other markets through fixed and regular schedules for the shipment of containers between ports.

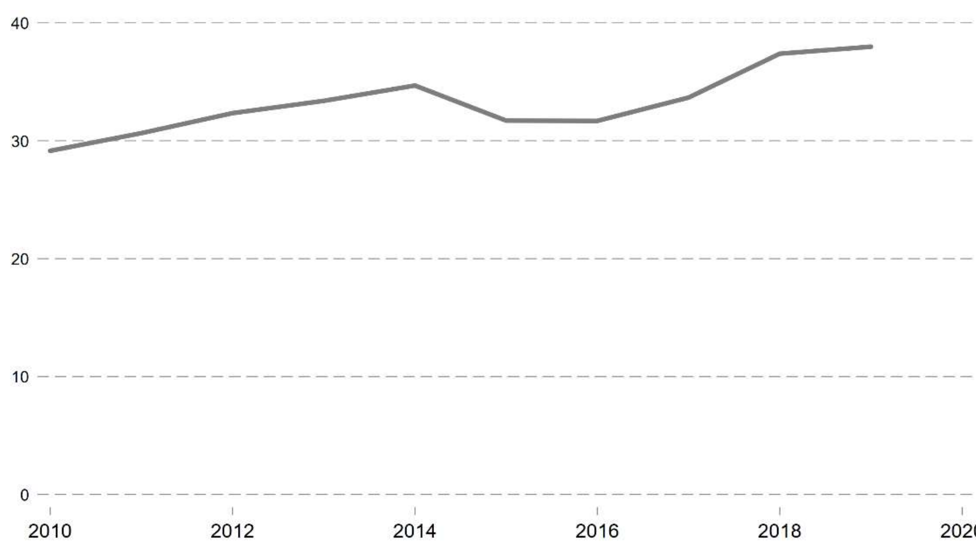
The prevalence of shipping more generally for the Singaporean economy is illustrated by the following: the Port of Singapore is the second-busiest port in the world[4] and Singapore's trade to GDP ratio is 320.5% while the world average is 60% for 2020.[5]

In this Section we discuss the development of demand, prices and connectivity over time. In addition, we discuss global developments in market structure as these also have an impact on the supply of services relevant for Singapore.

2.2 Demand

Between 2010 and 2019 the annual throughput of containers in Singaporean ports increased from 29.1 million to 38.0 million TEU[6] representing a 30.3% growth in this period. The increase in the volume of containers arriving at and departing from Singapore shows the relevance of containerised trade for imports and exports.

Figure 1: Development of container throughput in Singaporean ports (million TEUs)



Source: UNCTAD[7]

4 https://www.joc.com/special-topics/top-50-global-container-ports
5 https://data.worldbank.org/indicator/NE.TRD.GNFS.ZS?year_high_desc=true
6 A TEU is a twenty-foot equivalent container unit. Most containers are 40 feet in length equating to two TEU.
7 https://unctadstat.unctad.org/wds/TableViewer/tableView.aspx?ReportId=13321

Whist the numbers do not yet include 2020, in which volumes have likely been lower, in particular in the first part of the year due to Covid-19, volumes have rebounded more recently. S&P Global reported that in March 2021 container volumes in Singapore were up 2.3% on year, at a record high of 3.3 million TEUs.[8]

2.3 Pricing

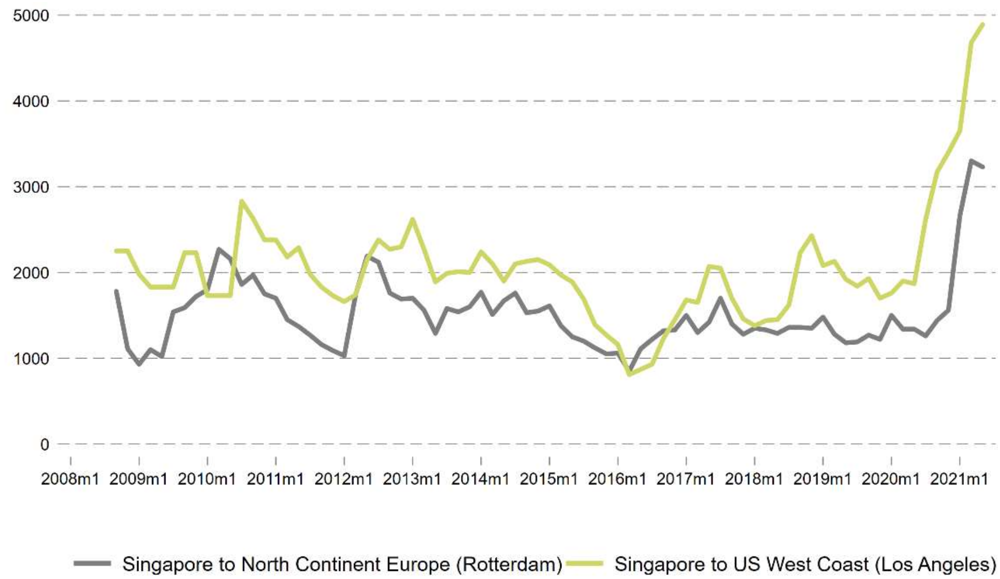
Prices for container shipping are driven by the balance of demand and supply. In other words, shortages of capacity will typically result in price increases and overcapacity typically results in price decreases.

There are, generally speaking, two types of pricing in the industry: longer-term contract rates and shorter-term spot rates. Contract rates are prices agreed between carriers and their customers, which are usually negotiated yearly and remain confidential. Spot rates are also agreed to between carriers and shippers in response to short-term demand and supply developments and exist in a more volatile marketplace. Contract rates and spot rates are related as longer-term contracted rates tend to reflect the development of spot rates over time. As such, the longer-term development of publicly reported spot rates provides a good proxy for the direction of longer-term confidential contract rates.

The graphs below show the development of spot rates for two major destinations relevant to Singapore: Singapore to Rotterdam in the Netherlands and Singapore to Los Angeles in the US between July 2011 and January 2021. Figure 2 and Figure 3 show the spot rates for 20ft and 40ft Dry containers, respectively.

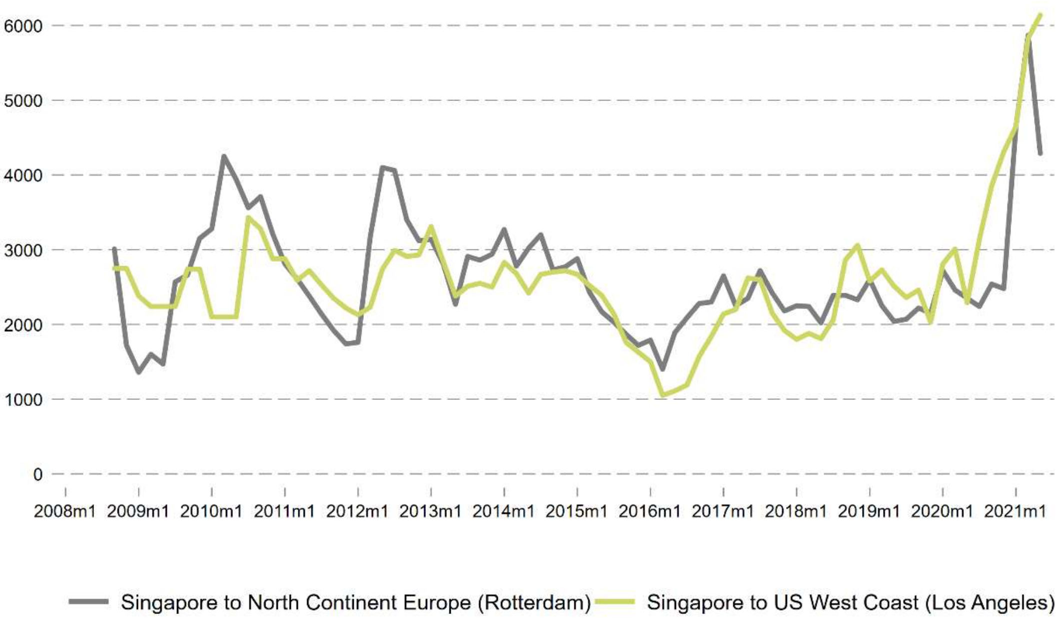
[8] https://www.spglobal.com/platts/en/market-insights/latest-news/shipping/041321-container-volumes-at-singapore-port-hit-record-high-in-march-up-23-on-year

Figure 2: **Development of spot container freight rates: Singapore to EU and US September 2008 – June 2021 for 20ft Dry containers**



Source: *Drewry Shipping Consultants Limited*

Figure 3: **Development of spot container freight rates: Singapore to EU and US September 2008 – June 2021 for 40ft Dry containers**



Source: *Drewry Shipping Consultants Limited*

It is evident from the graphs that prices fluctuate over time but, until 2020, prices move within similar price bands throughout the period. The sharp increase in prices shown in the second half of 2020 is clearly due to the extraordinary impact of the Covid-19 pandemic on the shipping industry in general and global trade overall.

The onset of the pandemic created an initial sharp contraction in volumes shipped at the start of 2020, but was followed by an unprecendeted surge resulting from an increase in demand that far outstripped, and continues to outstrip, the available supply of carrier capacity in the market.

The effects of this were exacerbated by the shortage of total containers and by the dislocation of available containers due to imbalances in trade flows. In particular, container manufacturing in China was largely put on hold in the first half of 2020. On top of this, carriers faced port congestion issues, many of which related to the pandemic, further contributing to shortages in capacity.

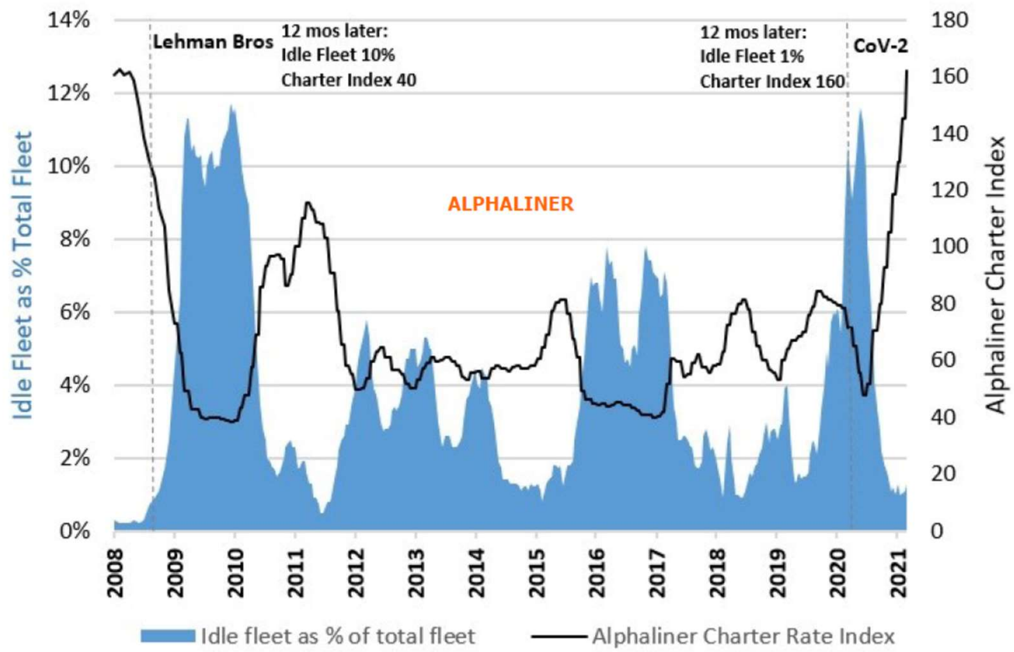
All in all, these effects created an extraordinary and exceptional increase in the spot rates. For the purposes of this report, and in the context of an evaluation of the public interest of the exemption for LSAs, it is worth noting the following:

- Prices for container shipping are driven by the balance of demand and supply, and a shortage of supply results in higher prices.
- While the current BEO includes agreements on price, since 2015, virtually all price-related agreements (i.e., liner conferences and voluntary discussion agreements) in all global ocean shipping trades including Singapore have terminated. At this time, carriers only participate in operational agreements. More broadly, however, the BEO does not authorize LSAs to "set" prices. All carriers that are members to an LSA set their prices independently. However, if all carriers are confronted with supply shortages it is logical that market prices of all carriers will increase during that period.
- The supply shortage that caused prices to increase sharply resulted from a unique, external factor (the Covid-19 pandemic). LSAs have not and could not have contributed to this shock in the shipping industry. In fact, all carriers, including those in LSAs, continue to employ as much capacity in the market as they can. As of 1 March 2021, an Alphaliner survey counted the inactive fleet at 190 ships, representing only 2.9% of the global cellular fleet capacity and found that 110 of those represent ships in shipyards undergoing maintenance, repairs, and retrofits.[9]
- The effects of the extreme shortage of vessel capacity is also evidenced by sharply increasing charter rates for vessels as seen in the graph below.

---

[9] Alphaliner Weekly Newsletter 2021-10, page 5.

Figure 4: **Development of idle fleet and charter rates container vessels**

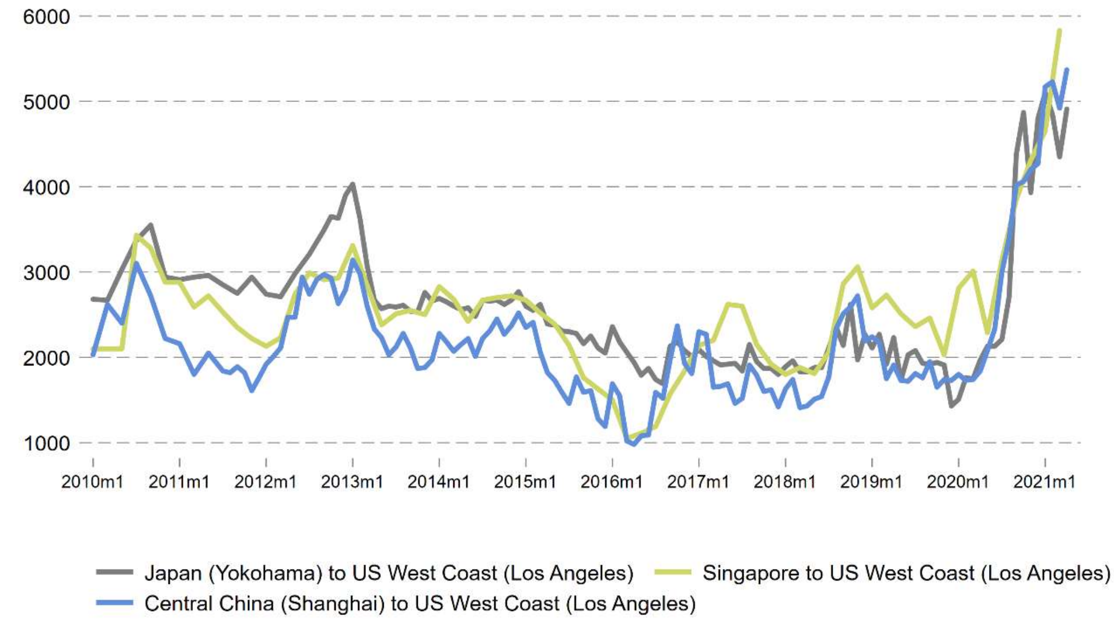


Source: Alphaliner Weekly Newsletter 2021-11

- This is a worldwide phenomenom that is not specific to Singapore. We understand that exporters and importers from Singapore have been confronted with higher shipping rates in the last year, but this trend occurred globally.

  By way of illustration, figure 5 below compares the development of spot rates for 40ft Dry containers shipped between Singapore and Los Angeles in the US with those for containers shipped from Shanghai in China and Yokohama in Japan to Los Angeles. It demonstrates that prices have been and remain aligned, and that all three locations are experiencing the higher shipping rates.

Figure 5: **Development of spot container freight rates: Singapore, Japan, and China to US January 2010 – March 2021 for 40ft Dry containers**



Source: Drewry Shipping Consultants Limited

One can reasonably expect that prices will adapt and normalize as the supply-demand balance normalizes, particularly as the dramatic spike in demand, and resulting bottlenecks, subsides.

2.4 Connectivity index

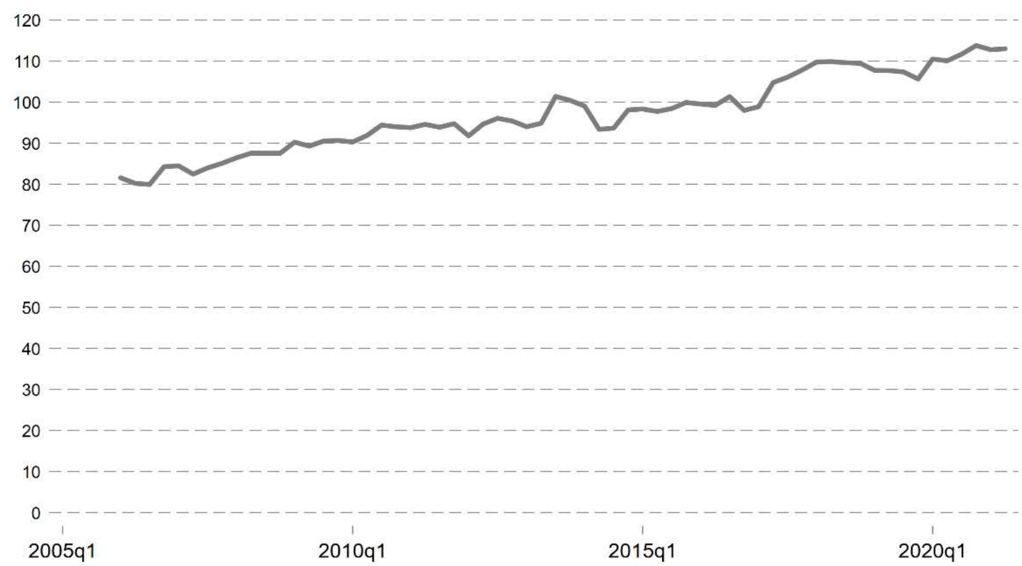
UNCTAD's Liner Shipping Connectivity Index (LSCI) shows the integration level of countries to global liner shipping networks.

The LSCI is composed of six components: (a) The number of scheduled ship calls per week in the country; (b) Deployed annual capacity in Twenty-Foot-equivalent Units (TEU): total deployed capacity offered at the country; (c) The number or regular liner shipping services from and to the country; (d) The number of liner shipping companies that provide services from and to the country; (e) The average size in TEU (Twenty-Foot-equivalent Units) of the ships deployed by the scheduled service with the largest average vessel size; and (f) The number of other countries that are connected to the country through direct liner shipping services.[10]

The graph below shows the development of Singapore's LSCI between 2006 and 2021.

[10] For each component, the country's value is divided by the maximum value for the component in Q1 2006 and then calculate the average of the six components for the country. The country average is then again divided by the maximum value for the average in Q1 2006 and multiplied with 100. The result is a maximum LSCI of 100 in Q1 2006. This means that the index for China in Q1 2006 is 100 and all other indices are in relation to this value.

Figure 6: LSCI Singapore Q1 2006 – Q2 2021



Source: UNCTAD[11]

The increases in the LSCI for Singapore shows that the integration of Singapore in international shipping networks continues to improve over time: it implies that the number of companies, vessels, services and/or the capacity deployed has increased over time, accommodating an increase in service quality and growth of TEUs shipped to and from Singapore.

2.5 Conclusions

The development of containers shipped, prices and connectivity all indicate that the liner shipping sector is competitive and has served and continues to serve Singapore's economy well.

- The sector has accommodated continued growth in Singapore's containerised trade over time as evidenced by the increase in containers shipped.
- It has allowed for improved services as shown by the increased connectivity of Singapore and Singapore's container ports.
- Shipping prices are competitive and follow the development of demand and supply in the market. At present, prices are high due to the Covid-19 pandemic, but will normalize once excess demand and bottlenecks subside.

[11] https://unctadstat.unctad.org/wds/TableViewer/tableView.aspx?ReportId=92

3 Services and cooperation on services with port calls in Singapore

3.1 Introduction

In this Section of the report, we will discuss the development of the liner shipping market and cooperation between carriers within the context of services with port calls in Singapore.

3.2 Development of liner shipping services with port calls in Singapore

3.2.1 2016 - 2021 comparison based on Drewry

The table below compares liner shipping services that connect Singapore to the rest of the world between April 2016 and April 2021. This only includes intercontinental services with port calls in Singapore (excluding Intra-Asia services). The information used for this overview has been obtained from Drewry Shipping Consultants.

Table 1: Development of intercontinental services with port calls in Singapore

		2016	2021
No. of carriers (group level)[12]		32	27
No. of services (most of them weekly)[13]	Total	89	101
	Offered by single operator	17	20
	Offered through VSA cooperation[14]	72	81
Average capacity of vessels deployed[15]		8,144 TEU	11,135 TEU
Total number of vessels deployed		710	844
Number of port calls Singapore		157	161

Source: Drewry Shipping Consultants Limited

Table 1 above shows that the number of carriers has decreased somewhat as a result of mergers, acquisitions and bankruptcies between 2016 and 2021. This decrease results from international developments that are not specific to Singapore. Relatively recent events include:

- The acquisition of CSCL by COSCO (2016);
- The acquisition of APL-NOL by CMA CGM (2016);[16]

---

12 A detailed overview is included in Annex B.
13 A detailed overview is included in Annex B.
14 This excludes slot agreements, as these are not recorded by Drewry.
15 These are calculated by multiplying the number of active vessels deployed for each service and average capacity divided by the total number of vessels deployed on all services combined as reported by Drewry.
16 CMA CGM includes the following carriers ("brands"): CMA CGM, ANL and APL.

- The acquisition of the United Arab Shipping Company (UASC) by Hapag Lloyd (2016);
- The market exit of Hanjin Shipping as a result of its bankruptcy (2016);
- The acquisition of Hamburg Sud by Maersk (2017);[17]
- The formation of the ONE joint venture combining the containerised services of NYK, MOL and K Line (2017), and
- The acquisition of OOCL by COSCO (2017).[18]

Despite these significant changes, the industry remains highly competitive, and the shipping market in Singapore remains healthy. Since the Singapore BEO was last renewed for a five-year term in 2015, and then extended for an additional year in 2020, the number of port calls, deployed vessels, total services, and the average capacity of the vessels employed on the services increased significantly, with the latter increasing by 36.7%. These changes have enabled the annual growth of container throughput (see Figure 1 in Section 2.2 of this report).

In addition, approximately 80% of services continue to be offered through LSA cooperation between carriers.

3.2.2 Recent service developments

Whilst Drewry Shipping Consultant data allows for a comparison of services over time, Alphaliner, another data provider specialising in container shipping, provides a continuously updated and more detailed snapshot of services provided, including the operators of the vessels employed in each service, which allows for the calculation of capacity shares. In addition, Alphaliner data also includes relevant information on slot agreements, which is a less integrated type of cooperation as compared to consortia.

Annex B includes an overview of the current services provided based on Alphaliner data. To a large degree this information is aligned with the services included in Drewry. However, there are changes to the services provided and the capacities deployed on individual services in response to fluctuations in demand (including seasonal fluctuations). This implies that there can be some differences between the two data sources.

In addition, Alphaliner, unlike Drewry, also provides overviews of the intracontinental services, such as services between North East and South East Asia. A large part of these services are so-called feeder services which allow for further transportation to and from the main container hubs.

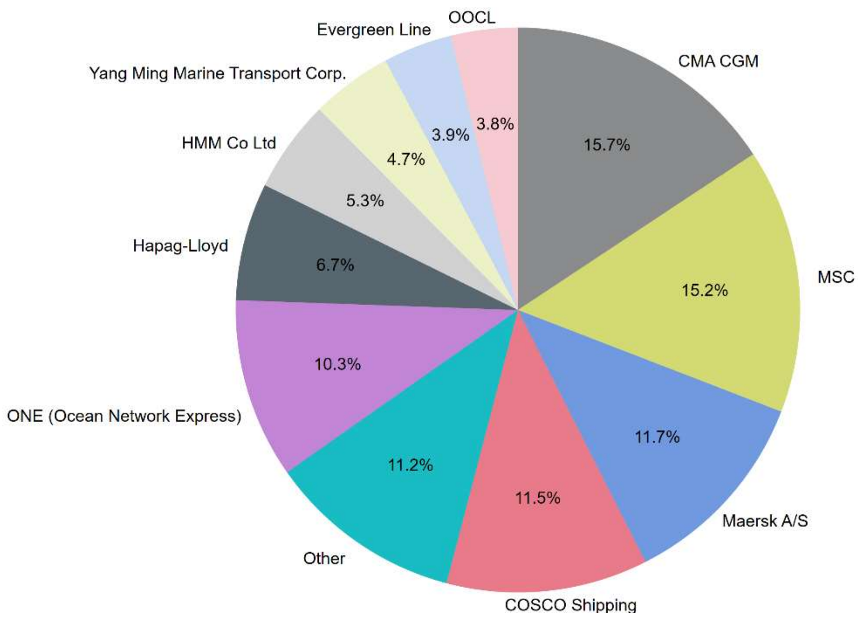
---

17 Maersk includes the following carriers ("brands"): Maersk, Hamburg Sud, Safmarine and Sealand.
18 COSCO includes the following carriers ("brands"): COSCO, CSCL and OOCL.

3.2.3 Capacity shares

Alphaliner reports the operator (i.e., carrier) for the vessels deployed on each of the services, allowing for the calculation of capacity shares of the top 10 largest carriers, as shown in figure 7 below.

Figure 7: Capacity shares Singapore related trades (inter- and intracontinental) February 2021



Source: RBB calculations based on Alphaliner data

The relatively large category of other carriers (11.2%) includes the carriers operating intracontinental feeder services.

3.2.4 Slot agreements

As indicated, Drewry reports on more structural cooperation between carriers through consortia. However, on the Singapore related shipping routes there are many services on which carriers other than the consortia partners are present as a result of buying or exchanging slots, which is captured by Alphaliner and shown in Annex B.3 of this report.

Table 5 in the Annex contains 235 services with port calls in Singapore. Of those, there are 76 services without slot agreements and only 31 operated by a single operator without any type of cooperation. The vast majority of services is hence operated with some type of operational cooperation between carriers.

3.3 The benefits of cooperation between carriers

Consortia and other cooperation agreements result in benefits to customers as cooperation between carriers allows for both (a) the generation of efficiencies through using larger vessels whilst at the same time allowing for more services with a regular frequency and (b) shipping lines to offer services where they would not have the scale to do so on their own.

These points are also relevant for the Singapore related trades:

- First, we have seen that the average size of vessels and total vessel capacity deployed on the services has increased over the last five years, whilst Singapore's overall liner connectivity has also continued to increase during that time.
- Second, there are many smaller carriers active on the Singapore related trades that have low market shares but are able to maintain current service levels as a result of cooperation with other carriers.

If consortia were not present in the trades in Singapore, each of the members of a consortium would need to decide whether to operate services independently. However, offering services independently could result in the need to reduce the size of vessels used and/or the frequency of services offered. This not only reduces the service quality but could result in the service not being competitive as the costs per container will increase with decreasing vessel size.

Additionally, in the absence of consortia, smaller carriers might decide to cease offering services, hence resulting in market exits and a reduction in the number of service options for shippers. This is also true for slot agreements: the very reason for slot agreements is that these are typically created to offer services that a carrier is not able to offer independently.

The counterfactual of an exemption for liner shipping agreements may well be a decrease in the number of carriers offering services in Singapore and a reduction in service quality as carriers will likely need to reduce their service frequencies to be able to fill up their vessels. In Annex A of this report we develop a stylised example demonstrating the likely adverse effects of a market structure that does not support operational cooperation between carriers.

4 Conclusions

One of the key questions in the context of the CCCS review will likely relate to the reasons shipping lines cooperate in consortia or other agreements in the provision of liner shipping services and, whether such cooperation is in the general public interest.

We have established in this report that carriers cooperate in consortia and through slot agreements on the large majority of services provided to and from ports in Singapore. We have also established that the available indicators strongly suggest that through this cooperation, the sector remains competitive and has served the economy in Singapore well.

In the absence of evidence to the contrary, this suggests that cooperation between carriers has not resulted in a reduction of competition and may well have provided and continues to provide benefits to customers in Singapore.

Indeed, this would be in line with the conclusion of the European Commission in relation to its evaluation of the costs and benefits of the Consortia Block Exemption Regulation that applies to cooperation agreements in relation to container shipping services with port calls in the European Union:

> *"(…) cooperation in consortia remains prevalent. Arguments that the high concentration level in the industry harms customers remain unsubstantiated as competition in the industry seems to function well, transferring a fair share of cost savings to customers in the form of lower prices and keeping the quality of services stable. In the circumstances the consortia Block Exemption Regulation remains relevant, facilitating types of cooperation that generate efficiency gains and benefit customers."*[19]

Our conclusions are also in line with CCCS' preliminary view to grant an extension of the BEO.

A counterfactual scenario, in which cooperation would not be allowed, does not exist in reality as the industry has a long history of cooperation, not only in Singapore but globally. However, on the basis of simple logic it can be demonstrated that the likely effects of no cooperation between carriers would include (i) a deterioration of the quality of services provided to customers in Singapore and/or higher prices and (ii) further market concentration through the market exit of smaller players that lack sufficient scale to offer services independently.

---

[19] Commission Staff Working Document – Evaluation of the Commission Regulation (EC) No 906/2009 of 28 September 2009 on the application of the Treaty to certain categories of agreements, decisions and concerted practices between liner shipping companies (consortia), 20 November 2019.

An exemption that would allow for useful operational cooperation between carriers can hence be considered in the public interest. Moreover, if the CCCS would continue to exempt consortia agreements, this would be in line with similar regimes around the world including in Europe and Asia, which would have the additional benefit of regulatory alignment in an industry that is inherently international in scope.

A Impact of consortia on service quality

A.1 Stylized example

A.1.1 Introduction

This Annex presents a stylised approach that is used to analyse the potential impact on the quality of service in the absence of consortia. We show that moving from the current market structure with consortia to a market structure without consortia would result in a severe reduction in the quality of service offered. The opposite is also true: consortia contribute to a higher level of services provided when compared to a counterfactual in which firms would not be allowed to cooperate.

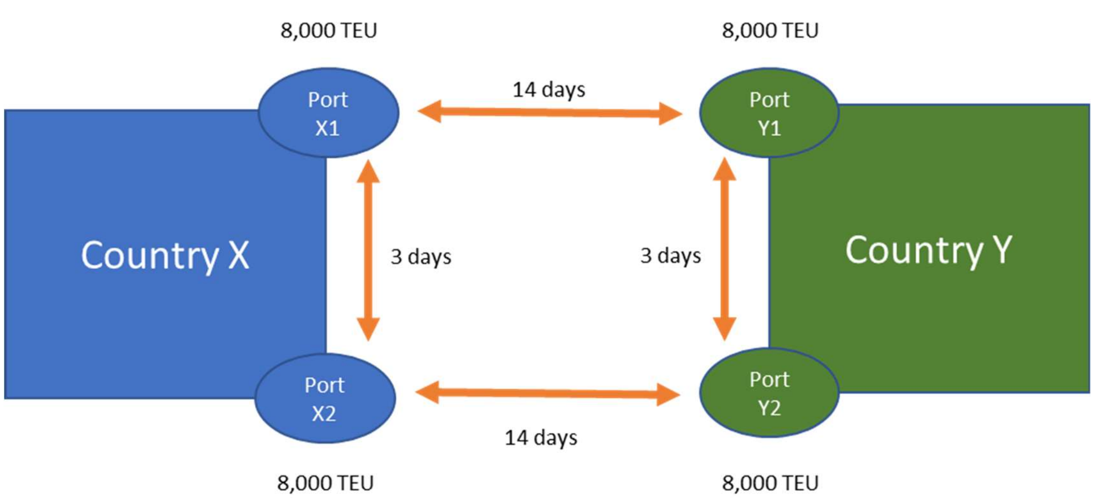
A.1.2 Assumptions

This model economy has two countries, X and Y, that trade with one another via their respective ports - X_1; X_2 and Y_1; Y_2. Each port has a weekly demand of 8,000 TEU which implies that 16,000 TEUs need to be shipped from country X to country Y and vice versa.

We assume that there are four carriers (A, B, C & D) that each have a 25% market share which is evenly distributed across all four ports that serve the industry, i.e. 25% of demand in X_1 is served by carrier A, another 25% is served by carrier B and so on.

Sailing time between the two countries is 14 days in either direction and for each possible port pair. Put differently, the sailing times from X_1 to Y_1 and from X_1 to Y_2 are the same. Sailing between the ports in each country takes 3 days. Therefore, a round trip calling at all four ports takes 34 days.

Figure 8: Stylized example of a "round trip" service



Source: RBB

The carriers are paired up in two consortia (AB & CD), each with a combined market share of 50% (the carriers have no activity outside the consortia).

Carriers can choose between three types of vessels that vary in their capacity and the associated costs per TEU: Small (2,000 TEUs), Medium (4,000 TEUs) and Large (8,000 TEUs) vessels. Vessels with a higher capacity operate with increased efficiency with respect to bunker consumption which also allows for reduced CO_2 emissions per TEU.

However, ships need to be filled to full capacity in order to achieve optimum cost efficiencies. Furthermore, reductions in variable costs are assumed to be passed on to clients (and as a result - end consumers) in the form of lower shipping rates.

A.1.3 Consortia are in place

AB and CD serve the demand in the most cost-efficient manner by deploying 5 large vessels that make a "round trip" calling at all four ports to allow for a weekly service. This allows for clients to be charged lower rates than otherwise possible. Each carrier contributes 2 or 3 large vessels to the consortium of which it is a member.

The "round trip" service is assumed to be launched for the very first time at port X_1 where an 8,000 TEU vessel is situated and filled half-way with 4,000 TEU worth of cargo – 2,000 TEUs from each LSA member. Three days later, the same vessel reaches port X_2 where another 4,000 TEUs of cargo are loaded onto it in the same manner so that it reaches full capacity.

Thereafter, the ship is deployed to port Y_2 where half of its cargo is unloaded and replaced with 4,000 TEUs of new cargo that needs to reach country X. This makes up for half of the total transit time. In the next string of the service, the vessel heads to port Y_1 where the other half of cargo shipped from country X is replaced with another 4,000 TEUs that are to be shipped to country X. This adds another three days to the aggregate transit time. Finally, all 8,000 TEUs of new cargo is shipped to port X_1 where half of it is replaced with new containers.

A.1.4 Consortia are not in place

In the absence of consortia, each carrier would be left with 2 or 3 vessels which it is unable to fill up to full capacity at the same rate as under its respective consortium. It would be very costly to replace them with smaller vessels.

Arguably the most important decision that would have to be made by carriers is whether to continue operations with the vessels they already have at their disposal or go through the lengthy and costly process of changing the composition of their fleet.

One option is for carriers to reduce service frequency so that their vessels are filled to full capacity instead of operating with very low utilisation. In our example, this implies on average another week at every port (more for the carrier which contributed three vessels, less for the carrier that contributed two vessels) and amounts to a 28 day increase in the total transit time of the "round trip" service.

Another option is for the consortium members to merge if they are not allowed to operate services jointly.

Both scenarios are likely to produce outcomes in which customers are worse off. In a consolidation scenario, the market structure moves from 4 to 2 firms, reducing competition as A and B and C and D compete with each other despite being part of the same consortium. In a scenario in which the four firms continue to compete with each other independently, transit times would go up dramatically in order to avoid running a highly inefficient service.

A third option for carriers would be to switch to smaller vessels. However, this would result in significant costs as the carrier first needs to dispose of the larger vessels and buy or charter the smaller vessels. More importantly, (variable) costs per TEU shipped would also increase significantly due to the smaller vessel size, resulting in upward pressure on pricing (and increased CO_2 emissions).

In addition, if the parties to one consortium merge, the carriers operating the same service with less frequency or with much smaller vessels independently, i.e., with lower service levels and/or higher prices, will be at a competitive disadvantage. This may deter those carriers to try it alone, and provides a significant incentive to merge (or leave the market).

B Service overview

B.1 Carriers active on the intercontinental trades with port calls in Singapore

The table below provides an overview of the independent carriers (at group level) with port calls in Singapore as part of their intercontinental services.

Table 2: Overview of carriers calling at ports in Singapore as part of their intercontinental services.

2016	2021
Bengal Tiger Line	Bengal Tiger
CMA CGM (including ANL and APL)	CMA CGM (including ANL, APL, and Delmas)
CSCL	(now part of COSCO)
COSCO	COSCO
Emirates	Emirates
Evergreen	Evergreen
Gold Star	Gold Star
HDS Lines	HDS Lines
HMM	HMM
Hamburg-Sud	(now part of Maersk)
Hanjin	no longer active
Hapag-Lloyd	Hapag-Lloyd
Interasia Lines	Interasia Lines
K-Line	ONE
KMTC	KMTC
MOL	(now part of ONE)
Maersk (including Safmarine)	Maersk (including Sealand)
MSC	MSC
NYK	(now part of ONE)
OOCL	(now part of COSCO)
PIL	PIL
RCL	RCL

2016	2021
TS Line	TS Line
UASC	(now part of Hapag Lloyd)
Wan Hai	Wan Hai
X-Press Feeders	X-Press Feeders
Yang Ming	Yang Ming
Zim	Zim
SCI	no longer active
Samudera	no longer active
Simatech	no longer active
TS Lines	no longer active
was not active yet	Pendulum Express
was not active yet	Sinokor Merchant
was not active yet	Swire Shipping
was not active yet	China Navigation
was not active yet	Niledutch
was not active yet	Feedertech

Source: RBB assessment based on Drewry Shipping Consultants

B.2 Overview of intercontinental services April 2016 vs. April 2021 based on Drewry

Table 3: Overview of intercontinental services with port calls in Singapore April 2016

Carriers/Alliance	Service Name	FREQ. (DAYS)	NO. ACTIVE SHIPS	ACTIVE SHIPS (AVE. TEU)
2M	AE1/Shogun	7	11	14,306
2M	AE10/Silk	7	11	18,357
2M	AE11/Jade	7	11	13,592
2M	AE12/TP2/Phoenix/Jaguar	7	14	9,240
2M	AE15/Tiger	7	10	13,716
2M	AE2/Swan	7	12	16,685

Carriers/Alliance	Service Name	FREQ. (DAYS)	NO. ACTIVE SHIPS	ACTIVE SHIPS (AVE. TEU)
2M	AE20/Dragon	7	11	13,191
2M	AE6/TP6/Lion/Pearl	7	15	12,917
2M	TP11/America	7	12	8,430
2M	TP8/TP12/New Orient/Empire	7	15	8,634
ANL	APR (Asia-PNG)	16	2	1,674
APL/MOL	WAX/CMI	7	7	9,044
APL/OOCL/Emirates	CIX	7	5	5,403
APL/OOCL/Hapag-Lloyd/MOL	CMX	7	6	8,897
APL	AS1	7	6	5,133
CKYHE Alliance/CSCL	AW8/AUE	7	10	8,300
CKYHE Alliance	AWE4/AWK/NUE4	7	11	8,510
CKYHE Alliance	FEM	7	8	7,300
CKYHE Alliance	MD1/PM1	7	16	9,948
CKYHE Alliance	MD2	7	9	8,950
CKYHE Alliance	NE2	7	10	13,988
CKYHE Alliance	NE3	7	11	13,574
CKYHE Alliance	NE6	7	9	13,092
CMA CGM/Hapag-Lloyd/ANL	EAX/New NEMO	7	13	4,896
CMA CGM/Hapag-Lloyd/Hamburg-Sud/NYK/CSCL	ASE1/NX1/Loop 1	14	6	8,583
CMA CGM/Maersk/Safmarine	Asia West Africa Service/FEW6/FW6	7	12	8,564
CMA CGM/NYK/APL/ANL	AAX	7	5	5,784
Cosco/PIL/MOL/K-Line/Evergreen	FAX-C/ASA-C	7	6	4,779
Cosco/Simatech/Evergreen	AGI	7	5	4,431
Emirates/CMA CGM/Maersk	ASEA/ASEA/ EAX	7	7	2,635
Evergreen/Cosco	FRS/FRX	7	6	7,636
Evergreen/X-Press Feeders/COSCON	EAX/AEF	7	5	3,234

Carriers/Alliance	Service Name	FREQ. (DAYS)	NO. ACTIVE SHIPS	ACTIVE SHIPS (AVE. TEU)
Evergreen/Zim/Cosco/Hanjin/CSCL/K-Line	ESA/ASE/ESA/ELX/ASAEC5	8	10	8,717
G6 Alliance/Evergreen	SVS/AUE3	7	10	6,757
G6 Alliance/Zim	NP1	7	7	9,190
G6 Alliance	AZX	7	11	6,602
G6 Alliance	CEC	7	11	8,842
G6 Alliance	EUM/MED	7	10	10,420
G6 Alliance	Loop 1	7	11	9,318
G6 Alliance	Loop 4	7	12	13,328
G6 Alliance	Loop 5	7	11	13,065
G6 Alliance	Loop 7	7	12	13,726
Hamburg-Sud/Gold Star/OOCL/RCL	CIX3/AIP/CI3/RKI	7	6	5,858
Hamburg-Sud/Hapag-Lloyd/UASC/CMA CGM	ASAEC2/NEX2/AS2	7	12	9,449
Hanjin/Maersk	CHX/IFX	7	6	5,521
Hanjin	FMX	7	7	6,781
Hapag-Lloyd/Evergreen/Wan Hai	CIX	7	4	4,341
Hapag-Lloyd/NYK/Yang Ming/X-Press Feeders/Simatech/Wan Hai	WIN/WIN/WIN/CCI/WIN/CNX2	7	6	5,798
HDS Lines	ISC Loop	8	4	2,463
HMM/Gold Star/TS Line	CIX	7	6	6,505
HMM/TS Line/Simatech	ACS/IFX	7	5	4,838
HMM	KMS	7	7	6,160
K-Line	WASCO	7	2	1,708
KMTC/Hanjin	FIX	7	6	4,979
Maersk/CMA CGM/APL	FI3/CIMEX-2N/CI3	7	7	7,830
Maersk/Safmarine/MSC	Boomerang/New Wallaby Service	7	11	4,562
Maersk	Horn of Africa	7	6	6,582

Carriers/Alliance	Service Name	FREQ. (DAYS)	NO. ACTIVE SHIPS	ACTIVE SHIPS (AVE. TEU)
Maersk	Northern Star	7	6	2,988
Maersk	Southern Star	7	5	4,215
MOL/NYK/X-Press	Thai Chennai Express/TCX	7	3	2,980
MOL/OOCL/PIL	Bight loop (AAA2/AAT/FA2)	7	4	4,623
MOL/PIL/Evergreen/K-Line/Cosco	FAX-S/ASA-S	7	7	4,613
MOL/Samudera	NKX/SPX	7	3	4,313
MSC/Maersk/MOL	Ipanema/SW2	7	11	8,334
MSC	Africa Express	7	12	9,501
MSC	Australia Express	7	12	5,891
MSC	Capricorn Service	7	6	3,017
MSC	Falcon	7	5	8,612
NYK/X-Press Feeders	Hercules service (HLS)	7	4	2,851
Ocean Three/Hanjin/Yang Ming	RES1/ RES/RES	7	7	9,201
Ocean Three	PEX3	7	11	5,064
OOCL/Cosco/Yang Ming	MEX/MAX	7	6	7,731
OOCL/PIL/Yang Ming/MOL	Torres loop (AAA1/AAB/AA1/FA1)	7	5	4,550
PIL/APL/ANL/NYK/OOCL/CMA CGM	NZS/NZE/NZX/NZS/KIX	7	6	4,434
PIL/APL/CMA CGM	RSS/REX	7	8	7,108
PIL	SW2/WAX	7	9	4,251
PIL	SWS	7	10	3,889
UASC/Hapag-Lloyd/OOCL/Hanjin/CSCL	AUS/AAC1/AOS/SAL/ASA	7	5	4,266
Wan Hai/Bengal Tiger Line	SC1/Loop1	14	1	4,252
Wan Hai/IAL/MOL/PIL	CI2/ICI/CIS	7	6	4,313
Wan Hai/PIL/COSCON	PMX/PMX/ PMX	7	5	4,319
Wan Hai/PIL	CMS/CSG	7	6	5,793
Wan Hai/SCI/K-Line/PIL/Simatech	INDFEX-1/IFX/IFX	7	6	4,272

Carriers/Alliance	Service Name	FREQ. (DAYS)	NO. ACTIVE SHIPS	ACTIVE SHIPS (AVE. TEU)
X-Press Feeders/RCL/MOL/NYK	TSC/SMX	7	4	2,598
Yang Ming/NYK/Hapag-Lloyd/Evergreen/K-Line/TS Lines/Simatech	CIX2/CISC/CIX2/CIX2	7	6	5,450
Yang Ming/OOCL	CPX	7	6	4,936
Yang Ming	CG2	7	6	5,548
Zim/Cosco/MOL	FAX/FWAS/WA1	7	11	4,614
Zim	Z7S	7	11	5,384

Source: Drewry Shipping Consultants

Table 4: Overview of intercontinental services with port calls in Singapore April 2021

Carriers/Alliance	Service Name	FREQ. (DAYS)	NO. ACTIVE SHIPS	ACTIVE SHIPS (AVE. TEU)
PIL	SWS	7	15	3,889
CMA CGM	WAX	7	13	5,700
ONE	WAU	7	2	1,708
CMA CGM/MSC	NEWMO/Australia Express	7	14	9,572
Ocean Alliance	FRS/FRX/REX/RES1	7	6	14,424
THE Alliance/Wan Hai	AR1	7	6	6,258
HDS Lines	SCP Loop	7	8	6,572
Maersk	New FI3	7	3	5,100
Feedertech/Evergreen/COSCO	AGI	7	6	5,301
COSCO/CMA CGM/Evergreen/Yang Ming	ASE/SEAS/ESA/SA3	7	12	9,452
OOCL/Yang Ming	CPX	7	5	5,117
TS Line/Feedertech/Evergreen/ONE	CIX2/NCI	7	7	5,652
PIL/OOCL	AA1/AAA1	7	5	4,578
ANL/CMA CGM/PIL/COSCO	KIX ANL/NZS	7	5	5,067
Hamburg-Sud	Southern Star	7	6	5,905
OOCL/COSCO/Hapag-Lloud	ASAL/ASA/SAL	7	5	4,578

Carriers/Alliance	Service Name	FREQ. (DAYS)	NO. ACTIVE SHIPS	ACTIVE SHIPS (AVE. TEU)
MSC	Capricorn	7	6	4,363
MSC	New Falcon Service	7	8	14,952
ANL/Hapag-Lloyd/ONE/Maersk	AAX1/SEA/AU1/COBRA	7	6	10,622
THE Alliance	PN2	7	6	12,690
COSCO/CMA CGM/APL	JCS/PEX2/CAX	7	12	10,960
THE Alliance	PS3	7	11	8,560
Ocean Alliance/PIL	RES2/RESS	7	7	13,208
Ocean Alliance/THE Alliance	MEX2/CEO/CIMEX5/ME3/AGS	7	5	17,292
X-Press Feeders/COSCO/RCL/ONE	TCX/RMB7/TE1	7	4	5,688
Bengal Tiger/Wan Hai	Singapore-Chennai Shuttle/SC1	7	2	2,824
Maersk	FEW2	7	13	5,466
HMM	CIX	7	7	6,763
OOCL/COSCO/RCL	CIX3/FI3/RKI10	7	7	9,572
ONE/X-Press Feeders	TIP/HLS	7	2	5,624
Wan Hai/Evergreen/Hapag-Lloyd	CIX	7	4	5,090
CMA CGM/Maersk/COSCO/Niledutch	AWAS/FEW6/FW6/FA1	7	12	8,586
OOCL/COSCO/ONE	WAX3/SW2	7	12	4,506
MSC	Africa Express	7	10	14,272
CMA CGM/OOCL/Evergreen	EAX/AEF	7	5	5,652
CMA CGM/Emirates	ASEA/EATX	7	6	2,756
COSCO/PIL/ONE/Hapag-Lloyd	ZAX2/SAS/ASA	7	9	5,014
Maersk	FEW3	7	13	5,466
COSCO/Wan Hai/Evergreen/ONE	PMX	7	6	5,652
ONE/COSCO/Zim/Gold Star	WA1/WAX1/FAX	7	11	5,466
2M	AE5/Albatross	7	13	20,568
Ocean Alliance	FAL1/AEU2/LL4	7	12	23,112

Carriers/Alliance	Service Name	FREQ. (DAYS)	NO. ACTIVE SHIPS	ACTIVE SHIPS (AVE. TEU)
2M	AE11/Jade	7	13	23,756
2M/Zim	AE15/Tiger/ZMS	7	11	19,224
2M/Zim	TP11/Elephant/ZNF	7	11	9,962
Ocean Alliance	PEX3/GME2/GCC1	7	12	9,289
2M	AE6/Lion	7	11	20,568
Ocean Alliance	MEX/WM1	7	10	14,812
Ocean Alliance	MEX2/AMX1/WM2/MD2	7	9	14,500
Ocean Alliance	FAL2/NE3/AEU3/LL2	7	11	20,988
Ocean Alliance/APL	Columbus Loop/PE1/SEAP/AWE5	7	19	16,020
2M	AE12/Phoenix	7	11	15,226
Ocean Alliance	BEX/EM1	7	9	10,622
Ocean Alliance	FAL3/AEU6/LL5	7	11	17,859
2M/Zim	TP17/America/Z7S	7	10	11,294
CMA CGM/Delmas	APR	16	2	1,740
Swire Shipping/China Navigation	East South East Asia/New Zealand	15	4	2,082
Wan Hai/MSC/ONE/Hapag-Lloyd	Ipanema/SX1/ASE2	7	13	11,923
Maersk/Hapag-Lloyd/Hamburg-Sud	ASAS/ASE/NGX	7	13	9,030
THE Alliance	AG3/KME	7	8	14,000
KMTC/TS Line/COSCO/Emirates	FIX/AIS/KCIS	7	7	6,655
PIL	EAS	7	6	4,250
PIL	MZS	14	4	1,808
Sealand	IA7	7	4	2,806
Ocean Alliance	FAL5/NE1/AEU1/LL1	7	12	21,413
Ocean Alliance	FAL7/NE7/AEU7/LL3	7	9	14,500
THE Alliance	FP1 PDM	7	14	9,592
THE Alliance	FE2	7	11	23,964

Carriers/Alliance	Service Name	FREQ. (DAYS)	NO. ACTIVE SHIPS	ACTIVE SHIPS (AVE. TEU)
THE Alliance	FE3	7	11	23,964
THE Alliance	FE4	7	12	23,964
THE Alliance	MD1	7	10	13,870
THE Alliance	MD2	7	10	14,993
THE Alliance	MD3	7	9	14,100
Ocean Alliance	PHEX/BEX2	7	8	9,289
2M/Zim	TP16/Emerald/ZSA	7	9	9,962
Ocean Alliance	AE6CC4/AACI	7	12	10,050
THE Alliance	EC4	7	11	14,100
THE Alliance	EC5	7	10	8,819
Ocean Alliance	AMA/CIMEX	7	6	9,448
MSC	Petra Express	7	6	6,627
Feedertech/Wan Hai/Sinokor Merchant	CI6/CISC2/SIS	7	6	4,730
PIL/COSCO/CMA CGM/Evergreen	SSA/SEAS2/ESA3	7	11	6,612
HMM/Sinokor Merchant	KCB	7	5	2,202
MSC	Ingwe Express	7	8	11,660
MSC	New Kiwi Express	7	3	3,586
Zim/ONE/COSCO/OOCL/Evergreen	SA1/SAC/ZAX3/FAX	7	8	5,090
Gold Star/Pendulum Express/KMTC/Emirates/Evergreen	NIX/NISC/AIS3/CIVS/CIX3	7	7	6,008
CMA CGM	AS1	7	6	10,106
COSCO/OOCL/PIL	AAA2/AA2	7	5	5,888
Ocean Alliance	FAL8/CES/AEU8	7	11	14,424
Ocean Alliance	CIMEX7/MEX/CMEX/ME5	7	7	20,988
CMA CGM/Maersk/Hapag-Lloyd	AAX2/KOMODO/S2A	7	7	6,921
CMA CGM/COSCO/TS Line/RCL/Feedertech/KMTC	IEX/FCS/IFX/RFM/FME	7	6	6,621

Carriers/Alliance	Service Name	FREQ. (DAYS)	NO. ACTIVE SHIPS	ACTIVE SHIPS (AVE. TEU)
COSCO/OOCL/Wan Hai/ONE	FCE/FCS2/CI3/CCX	7	5	4,583
THE Alliance	FP2 PDM	7	15	14,100
2M	AE55/Griffin	7	11	19,630
Wan Hai/Interasia Lines/KMTC/Gold Star	CI5/FME2/CIX	7	5	5,060
MSC	Sentosa	7	10	5,059
ANL	PAX ANL	10	2	1,102
TS Line/X-Press Feeders/PIL/KMTC	CWX	7	6	5,466
X-Press Feeders	STRAITS MIDDLE EAST X-PRESS (SMX)	7	4	5,773

Source: Drewry Shipping Consultants

B.3 Overview of services based on Alphaliner (July 2021)

Table 5: Overview of services with port calls in Singapore – Alphaliner July 2021[20]

Service	Partner	Ships Deployed
Mediterranean to US East Coast / US Gulf / USWC		
COSCO / OOCL – China-Vietnam-Med-USEC service (AWE6 / VCE)	COSCO Shipping / OOCL	6 ships (from 8,501 - 14,568 teu)
Asia / North America services		
MSC - South East Asia-California service (Sentosa)	MSC	9 ships (from 13,000 - 15,000 teu)
OCEAN Alliance - FE-PSW-FE-ECNA via Suez pendulum (PSW3 + AWE3)	CMA CGM / Alliance partners: COSCO Shipping / Evergreen Line / OOCL	19 ships (from 10,070 - 16,020 teu)
THE Alliance - Asia-North Europe-USWC pendulum - FP1 = FE1 + PS1	ONE (Ocean Network Express) / Alliance partners: HMM Co Ltd / Hapag-Lloyd / Yang Ming Marine Transport Corp. / Slotters: COSCO Shipping / Evergreen Line / CMA CGM / OOCL	15 ships (from 9,012 - 9,592 teu)
THE Alliance - FE-WCNA - PN2	ONE (Ocean Network Express) / Hapag-Lloyd / Yang Ming Marine Transport Corp. / Alliance partners: HMM Co Ltd	8 ships (from 9,592 - 12,726 teu)
THE Alliance - ISC-FE-WCNA - PS3	ONE (Ocean Network Express) / Yang Ming Marine Transport Corp. / Alliance partners:	11 ships (from 6,765 - 9,592 teu)

20 The number of services included in this table is larger than the number of services included in Table 5 above based on Drewry. Alphaliner also reports intra-continental services, which includes a large number of feeder services. Other differences may result from using different definitions and changes over time.

Service	Partner	Ships Deployed
	HMM Co Ltd / Hapag-Lloyd / Slotters: Samudera / X-Press Feeders Group	
THE Alliance - North Europe-Asia-USWC pendulum - FP2 = FE5 + PS7	Yang Ming Marine Transport Corp. / ONE (Ocean Network Express) / Alliance partners: Hapag-Lloyd / HMM Co Ltd	18 ships (from 13,870 - 14,220 teu)
2M / ZIM - FE-USEC service (TP-11 / Elephant / ZNF)	Maersk A/S / Alliance partners: MSC / Slotters: Zim	11 ships (from 7,831 - 9,962 teu)
2M / ZIM - FE-USEC service - TP-16 / Emerald / ZSA	Maersk A/S / MSC / Slotters: Zim	11 ships (from 8,204 - 9,962 teu)
2M / Zim - FE-USEC service - TP-17 / America / Z7S (HS : ASUS 5)	Maersk A/S / Alliance partners: MSC / Hamburg Süd / Slotters: Zim	11 ships (from 8,400 - 11,294 teu)
OCEAN Alliance - FE-US Gulf - AWE6	CMA CGM / Alliance partners: COSCO Shipping / Evergreen Line / OOCL	12 ships (from 8,465 - 9,365 teu)
THE Alliance - FE-ECNA - EC5 / SUEZ2	HMM Co Ltd / ONE (Ocean Network Express) / Hapag-Lloyd / Yang Ming Marine Transport Corp.	11 ships (from 6,724 - 9,954 teu)
THE Alliance - FE-USEC - EC4 / SUEZ1	HMM Co Ltd / ONE (Ocean Network Express) / Hapag-Lloyd / Yang Ming Marine Transport Corp.	12 ships (from 13,470 - 14,198 teu)
CMA CGM / COSCO / Hapag-Lloyd - East Asia-Mexico-Caribbean-NCSA service (PEX 2 / CAX 1 / JCS / ASCA)	CMA CGM / COSCO Shipping / Hapag-Lloyd / Slotters: OOCL / Maersk A/S / Hamburg Süd	12 ships (from 8,750 - 11,040 teu)
North Europe / Far East		
2M agreement - Asia-Europe (AE-5 / Albatross) (HS : NERA 5) (HL : FE7)	Maersk A/S / MSC / Alliance partners: Hamburg Süd / Slotters: Hapag-Lloyd	13 ships (from 18,340 - 20,568 teu)
2M agreement - Asia-Med-N. Europe - AE-55 / Griffin	Maersk A/S / MSC / Alliance partners: Hamburg Süd	11 ships (from 14,036 - 23,656 teu)
2M agreement - Europe-FE service (AE-6 / Lion)	Maersk A/S / MSC / Alliance partners: Hamburg Süd	11 ships (from 13,000 - 20,568 teu)
OCEAN Alliance - Asia-North Europe service - NEU1	OOCL / COSCO Shipping / Alliance partners: CMA CGM / Evergreen Line	12 ships (from 13,092 - 21,413 teu)
OCEAN Alliance - Asia-North Europe service - NEU2	COSCO Shipping / Alliance partners: CMA CGM / Evergreen Line / OOCL	11 ships (from 18,980 - 21,237 teu)
OCEAN Alliance - Asia-North Europe service - NEU3	COSCO Shipping / Alliance partners: Evergreen Line / CMA CGM / OOCL	10 ships (from 13,092 - 18,980 teu)
OCEAN Alliance - Asia-North Europe service - NEU4	CMA CGM / Alliance partners: COSCO Shipping / Evergreen Line / OOCL	13 ships (from 17,292 - 23,112 teu)
OCEAN Alliance - Asia-North Europe service - NEU5	CMA CGM / Alliance partners: COSCO Shipping / Evergreen Line / OOCL	11 ships (from 17,292 - 17,859 teu)

Service	Partner	Ships Deployed
OCEAN Alliance - Asia-North Europe service - NEU7	Evergreen Line / Alliance partners: CMA CGM / COSCO Shipping / OOCL	11 ships (from 13,808 - 14,424 teu)
THE Alliance - Asia-North Europe service - FE2	Hapag-Lloyd / ONE (Ocean Network Express) / HMM Co Ltd / Alliance partners: Yang Ming Marine Transport Corp.	12 ships (from 16,010 - 23,964 teu)
THE Alliance - Asia-North Europe service - FE3	HMM Co Ltd / ONE (Ocean Network Express) / Hapag-Lloyd / Alliance partners: Yang Ming Marine Transport Corp.	11 ships (from 5,014 - 23,964 teu)
THE Alliance - Asia-North Europe service - FE4	ONE (Ocean Network Express) / HMM Co Ltd / Alliance partners: Hapag-Lloyd / Yang Ming Marine Transport Corp.	12 ships (from 16,010 - 23,964 teu)
THE Alliance - Asia-North Europe service - FE4 Extra sailers	Hapag-Lloyd / Yang Ming Marine Transport Corp. / ONE (Ocean Network Express) / HMM Co Ltd	12 ships (from 13,470 - 14,993 teu)
Med / Far East		
2M agreement - Asia-Med - AE-11 / Jade (HS : SERA 2)	MSC / Maersk A/S / Alliance partners: Hamburg Süd	13 ships (from 19,437 - 23,756 teu)
2M agreement - Asia-Med - AE-12 / TP-2 / Phoenix (Zim : ZAS)	Maersk A/S / MSC / Alliance partners: Hamburg Süd / Slotters: Zim	11 ships (from 14,036 - 15,282 teu)
2M agreement - Asia-Med - AE-15 / Tiger (ZIM : ZMS)	MSC / Alliance partners: Hamburg Süd / Maersk A/S / Slotters: Zim	11 ships (from 19,224 - 19,462 teu)
MSC / CMA CGM - Europe-Mascareignes-Australia-Singapore-Colombo service (Australia Express / NEMO)	MSC / CMA CGM	14 ships (from 8,238 - 9,580 teu)
OCEAN Alliance - Asia-Med service - MED1	COSCO Shipping / Evergreen Line / Alliance partners: CMA CGM / OOCL	10 ships (from 13,092 - 14,424 teu)
OCEAN Alliance - Asia-Med service - MED2	CMA CGM / OOCL / Alliance partners: Evergreen Line / COSCO Shipping	11 ships (from 11,040 - 17,292 teu)
OCEAN Alliance - Asia-Med service - MED3	CMA CGM / COSCO Shipping / Alliance partners: Evergreen Line / OOCL / Slotters: FESCO / Turkon Line	10 ships (from 9,092 - 10,926 teu)
OCEAN Alliance - Asia-Med service - MED5	CMA CGM / COSCO Shipping / Evergreen Line / Alliance partners: OOCL	10 ships (from 6,350 - 9,326 teu)
THE Alliance - Asia-Med service - MD1	ONE (Ocean Network Express) / Hapag-Lloyd / Alliance partners: HMM Co Ltd / Yang Ming Marine Transport Corp.	11 ships (from 13,371 - 13,870 teu)
THE Alliance - Asia-Med service - MD2	HMM Co Ltd / ONE (Ocean Network Express) / Hapag-Lloyd / Alliance partners: Yang Ming Marine Transport Corp.	11 ships (from 13,470 - 16,010 teu)
THE Alliance - Asia-Med service - MD3	Hapag-Lloyd / Yang Ming Marine Transport Corp. / Alliance partners: HMM Co Ltd / ONE (Ocean Network Express)	11 ships (from 13,169 - 14,220 teu)

Service	Partner	Ships Deployed
Far East / Indian subcontinent		
BTL / Wan Hai - Straits-East India service	Bengal Tiger Line / Wan Hai Lines / Slotters: Interasia Lines (IAL) / ONE (Ocean Network Express) / PIL / CMA CGM / X-Press Feeders Group / Evergreen Line	2 ships (from 1,718 - 2,824 teu)
CMA CGM - China-India-Pakistan service (Asia Subcontinent Express 1 - AS 1)	CMA CGM / Slotters: X-Press Feeders Group / RCL (Regional Container Line) / Gold Star Line / Zim / COSCO Shipping / OOCL	6 ships (from 6,350 - 6,758 teu)
COSCO / TS Lines / RCL / CMA CGM / Feedertech / KMTC - India East Coast Express	Feedertech Pte Ltd / COSCO Shipping / TS Lines / RCL (Regional Container Line) / CMA CGM / KMTC / Slotters: China United Lines / Interasia Lines (IAL) / Evergreen Line / OOCL	6 ships (from 4,992 - 6,627 teu)
COSCO/OOCL - China-India-Pakistan service (CI1)	COSCO Shipping / OOCL / Slotters: CMA CGM / Gold Star Line / Zim / RCL (Regional Container Line) / China United Lines	6 ships (from 8,501 - 8,888 teu)
Evergreen Line / COSCO / Feedertech / KMTC - ASEAN-ISC service (AGI)	Feedertech Pte Ltd / Evergreen Line / COSCO Shipping / Slotters: PIL / HMM Co Ltd	6 ships (from 3,820 - 5,294 teu)
Evergreen Line / TS Lines / ONE / Feedertech - China-India Express 2	TS Lines / ONE (Ocean Network Express) / Feedertech Pte Ltd / Evergreen Line / Slotters: Samudera / PIL / HMM Co Ltd	7 ships (from 4,957 - 5,624 teu)
Evergreen Line / Wan Hai / Hapag-Lloyd - China-India Express (CIX)	Evergreen Line / Wan Hai Lines / Hapag-Lloyd / Slotters: Interasia Lines (IAL)	4 ships (from 4,252 - 5,364 teu)
GSL / KMTC / Evergreen / ESL / X-Press Feeders - Far East India Vietnam Express (FIVE)	X-Press Feeders Group / Emirates Shipping Line / Gold Star Line / KMTC / Evergreen Line / Slotters: RCL (Regional Container Line) / Zim	6 ships (from 4,957 - 5,936 teu)
HDAS Lines (IRISL Group) - Far East-Middle East service	IRISL / Slotters: HDAS Lines	0 ships
HMM - China-India Express (CIX)	HMM Co Ltd / Slotters: TS Lines / X-Press Feeders Group / Sinokor	6 ships (from 5,023 - 6,800 teu)
Interasia Lines / Wan Hai / Feedertech / Sinokor / Heung-A Line - China-India West Coast service (CI6 / SIS)	Interasia Lines (IAL) / Wan Hai Lines / Feedertech Pte Ltd / Heung-A Line / Sinokor / Slotters: Yang Ming Marine Transport Corp.	7 ships (from 4,178 - 4,730 teu)
KMTC / COSCO / TS Lines / ESL - Far East India Express (FIX / AIS / KCIS)	Emirates Shipping Line / KMTC / COSCO Shipping / TS Lines / Slotters: China United Lines	7 ships (from 5,443 - 6,655 teu)
Maersk - China-Korea-India Express (FI3 - new version)	Maersk A/S	3 ships (from 3,388 - 4,256 teu)
MSC - Far East-ISC-Middle East service (Falcon)	MSC	7 ships (from 8,034 - 15,000 teu)
MSC - Far East-South Africa-ME-ISC service (Ingwe)	MSC	10 ships (from 5,624 - 8,073 teu)

Service	Partner	Ships Deployed
ONE / X-Press Feeders - SE Asia-India-Pakistan service (TIP / HLS)	ONE (Ocean Network Express) / X-Press Feeders Group / Slotters: CMA CGM / Interasia Lines (IAL) / RCL (Regional Container Line) / Samudera / HMM Co Ltd	5 ships (from 4,957 - 5,624 teu)
ONE / X-Press Feeders / RCL / COSCO - Straits-Thailand-Chennai Pendulum - 'Thai-Chennai Express' (TE1 / TCX / RMB / TCX)	RCL (Regional Container Line) / ONE (Ocean Network Express) / X-Press Feeders Group / COSCO Shipping / Slotters: Gold Star Line / Zim / TS Lines / Samudera / CNC / HMM Co Ltd / CMA CGM / PIL / Bengal Tiger Line / Wan Hai Lines / Interasia Lines (IAL) / OOCL / Evergreen Line	4 ships (from 1,850 - 5,668 teu)
OOCL / CMA CGM / RCL / GSL - China-India Express	RCL (Regional Container Line) / CMA CGM / Gold Star Line / OOCL / Slotters: Zim / COSCO Shipping	7 ships (from 5,551 - 9,580 teu)
Wan Hai / COSCO / Evergreen / ONE / Interasia - Asia-Pakistan Mundra Express (PMX / APM)	Interasia Lines (IAL) / ONE (Ocean Network Express) / Wan Hai Lines / COSCO Shipping / Evergreen Line / Slotters: PIL / OOCL	6 ships (from 5,364 - 5,668 teu)
Wan Hai / Interasia Line / COSCO / OOCL / ONE - India East Coast Express 2	ONE (Ocean Network Express) / OOCL / Wan Hai Lines / COSCO Shipping / Interasia Lines (IAL) / Slotters: Samudera	5 ships (from 4,228 - 4,738 teu)
Wan Hai / Interasia Line / KMTC / GSL - China-Korea-Eastern India service (CI5 / FME2 / CEX)	Wan Hai Lines / Interasia Lines (IAL) / KMTC / Gold Star Line / Slotters: Zim	6 ships (from 2,554 - 4,294 teu)
X-Press Feeders / KMTC / TS Lines / PIL - China-India West Coast service (CWX / AIS4 / CWX) (CMA CGM : AS9)	Gold Star Line / PIL / X-Press Feeders Group / TS Lines / KMTC / Slotters: OOCL / RCL (Regional Container Line) / CMA CGM / ONE (Ocean Network Express)	6 ships (from 2,782 - 4,896 teu)
Yang Ming / OOCL - China Pakistan India Express (CPX)	Yang Ming Marine Transport Corp. / OOCL / Slotters: COSCO Shipping	6 ships (from 4,253 - 5,117 teu)
Far East / Middle East Gulf - dedicated services		
HDAS Lines (IRISL Group) - China-Iran service	HDAS Lines	0 ships (from 6,500 - 6,572 teu)
HDAS Lines (IRISL Group) - Port Kelang-Iran service (HDM)	HDAS Lines	4 ships (from 14,508 - 14,508 teu)
Maersk / X-Press Feeders - SE Asia-Gulf-Hazira-Colombo service (Arabian Star / SMX)	X-Press Feeders Group / Maersk A/S / Slotters: Yang Ming Marine Transport Corp.	4 ships (from 2,524 - 2,824 teu)
OCEAN Alliance - Far East-Middle East service - MEA1	CMA CGM / COSCO Shipping / Evergreen Line / OOCL	7 ships (from 9,415 - 10,926 teu)
OCEAN Alliance - Far East-Middle East service - MEA3	COSCO Shipping / Evergreen Line / OOCL / CMA CGM	7 ships (from 13,092 - 13,208 teu)
OCEAN Alliance / PIL / Wan Hai - Far East-Middle East service - MEA5 / CSG	COSCO Shipping / Alliance partners: CMA CGM / OOCL / Evergreen Line / Slotters: Wan Hai Lines / PIL	7 ships (from 14,074 - 21,237 teu)

Service	Partner	Ships Deployed
THE Alliance - Far East-Middle East 'AG2' service (YM : CGX)	ONE (Ocean Network Express) / Yang Ming Marine Transport Corp. / Alliance partners: Hapag-Lloyd / HMM Co Ltd	7 ships (from 6,258 - 6,588 teu)
THE Alliance - Far East-Middle East 'new AG3' service	Hapag-Lloyd / HMM Co Ltd / Alliance partners: ONE (Ocean Network Express) / Yang Ming Marine Transport Corp.	8 ships (from 13,169 - 14,993 teu)
Far East / Red Sea - dedicated services		
MSC – Far East-Red Sea service (Petra)	MSC	6 ships (from 5,060 - 13,092 teu)
OCEAN Alliance / PIL - Far East-Red Sea Express service 1 (RES1 / RES)	CMA CGM / COSCO Shipping / Evergreen Line / Alliance partners: OOCL / Slotters: PIL	9 ships (from 13,808 - 14,000 teu)
OCEAN Alliance / PIL - Far East-Red Sea Express service 2 (RES2 / RSS)	CMA CGM / COSCO Shipping / OOCL / PIL / Alliance partners: Evergreen Line	8 ships (from 11,923 - 14,568 teu)
THE Alliance / Wan Hai - Asia-Red sea service (AR1)	ONE (Ocean Network Express) / Yang Ming Marine Transport Corp. / Wan Hai Lines / Alliance partners: Hapag-Lloyd	8 ships (from 4,662 - 6,258 teu)
Bay of Bengal services		
CNC / CMA CGM - Chittagong feeder service (BBX)	CNC / Slotters: CMA CGM	3 ships (from 1,774 - 1,774 teu)
COSCO / New Golden Sea Shg - Yangpu Chittagong Express (YCX)	COSCO Shipping / New Golden Sea Shipping Pte Ltd (GSS)	3 ships (from 1,713 - 1,714 teu)
Far Shipping - Port Kelang Kolkata Colombo service (PKC)	Far Shipping Lines / Slotters: Wan Hai Lines / Gold Star Line / ONE (Ocean Network Express) / Zim	1 ships (from 1,019 - 1,019 teu)
HDAS Lines (IRISL Group) - Port Kelang-Bangladesh & Myanmar feeder service (SCY)	IRISL / Slotters: HDAS Lines	1 ships (from 998 - 998 teu)
HMM / Sinokor - China-Straits-Bangladesh service (KCB)	HMM Co Ltd / Sinokor	5 ships (from 1,496 - 2,268 teu)
HR Lines - Bangladesh services (BES + CCE)	HR Lines / Slotters: Clarion Shipping / Advance Container Line (ACL) / PIL	4 ships (from 1,510 - 1,550 teu)
Interasia Lines / COSCO / RCL / X-Press Feeders - Singapore-PK-Myanmar shuttle (SYM / SYM1) (XP : YSS)	X-Press Feeders Group / RCL (Regional Container Line) / Interasia Lines (IAL) / COSCO Shipping / Slotters: TS Lines	3 ships (from 1,064 - 1,200 teu)
Interasia Lines / COSCO / Samudera - Singapore-Chittagong service (ICS)	Interasia Lines (IAL) / COSCO Shipping / Samudera / Slotters: OOCL	2 ships (from 1,064 - 1,702 teu)
Maersk / Sealand Asia - Central China-Straits-Chittagong service 1 (SH-1)	Sealand Asia / Slotters: TS Lines / Maersk A/S	5 ships (from 2,586 - 2,806 teu)
ONE - Singapore-Chittagong feeder service (BAS) (COSCO : CGX 1)	ONE (Ocean Network Express) / Slotters: Straits Orient Lines (SOL) / Samudera / PIL / CMA CGM / Advance Container Line (ACL)	1 ships

Service	Partner	Ships Deployed
PIL-ACL - Chittagong & Mongla feeder service (BD2)	PIL / Slotters: Advance Container Line (ACL)	1 ships (from 938 - 938 teu)
PIL-ACL - Singapore-Calcutta feeders (CALEX / CCU)	PIL / Slotters: Advance Container Line (ACL)	5 ships (from 777 - 938 teu)
PIL-ACL - Singapore-India-Bangladesh service (IBS)	PIL / Slotters: Advance Container Line (ACL)	1 ships (from 938 - 938 teu)
PIL-ACL / Samudera - Bangladesh feeder services (BD1 / BGX) (COSCO : CGX 1)	PIL / Samudera / Slotters: ONE (Ocean Network Express) / COSCO Shipping / CMA CGM / Advance Container Line (ACL)	5 ships (from 1,400 - 1,900 teu)
Samudera - Calcutta Express (CALEX) / Singapore-Calcutta service (SCS) (ONE : CCU) (OOCL : CSX 2)	Samudera / Slotters: Straits Orient Lines (SOL) / ONE (Ocean Network Express) / OOCL / Far Shipping Lines	5 ships (from 609 - 629 teu)
Straits Orient Lines - Straits-Bangladesh service (CGX)	Straits Orient Lines (SOL) / Slotters: Sealand Asia / Yang Ming Marine Transport Corp. / COSCO Shipping / CMA CGM	4 ships (from 1,512 - 1,730 teu)
Straits Orient Lines - Straits-Calcutta-Haldia service (CHS) (YM : SBS)	Straits Orient Lines (SOL) / Slotters: Sealand Asia / Yang Ming Marine Transport Corp. / ONE (Ocean Network Express) / Gold Star Line / Zim / CMA CGM	2 ships (from 1,134 - 1,134 teu)
VASI Shipping - Straits-Bangladesh & Thailand service	VASI Shipping Pte Ltd	2 ships (from 1,679 - 1,730 teu)
X-Press Feeders / BTL - Bay of Bengal services - Straits-NE India shuttles (CC : GAF India)	X-Press Feeders Group / Bengal Tiger Line / Slotters: Wan Hai Lines / Gold Star Line / CMA CGM / ONE (Ocean Network Express) / Zim / CNC	fleet varies
X-Press Feeders / OOCL / Wan Hai - Straits-Chittagong shuttles (SBX / CIN / SCX) (COSCO : CGX 3)	Hapag-Lloyd / Wan Hai Lines / X-Press Feeders Group / OOCL / Slotters: Gold Star Line / CMA CGM / COSCO Shipping / RCL (Regional Container Line) / Zim / CNC	7 ships (from 1,756 - 2,202 teu)
Yang Ming - Bangladesh feeder service (SE6)	Yang Ming Marine Transport Corp. / Slotters: Sealand Asia / OOCL	2 ships (from 1,560 - 1,560 teu)
Services East Asia / South & East Africa		
CMA CGM / Emirates Shg Line - Asia-East Africa relay service (ASEA-Tanzania / ATX)	CMA CGM / Emirates Shipping Line / Slotters: OOCL / ONE (Ocean Network Express) / Evergreen Line / X-Press Feeders Group / APL	7 ships (from 2,478 - 2,756 teu)
CMA CGM / Maersk - SE Asia-Indian Ocean Islands-Mozambique service (MOZEX / M-Express)	CMA CGM / Maersk A/S	8 ships (from 3,091 - 3,718 teu)
Evergreen / X-Press Feeders / OOCL / CMA CGM - Asia-East Africa service (AEF / MFX / EAX3 / ASEA-Kenya)	OOCL / CMA CGM / Evergreen Line / X-Press Feeders Group / Slotters: KMTC / Hapag-Lloyd / COSCO Shipping / APL / ONE (Ocean Network Express) / Emirates Shipping Line / Shipping Corp. of India (SCI)	7 ships (from 4,211 - 5,364 teu)

Service	Partner	Ships Deployed
Evergreen Line / COSCO / PIL / ONE / GSL - Far East-South Africa service - Southern China Loop	ONE (Ocean Network Express) / Evergreen Line / COSCO Shipping / PIL / Slotters: Gold Star Line / Zim / OOCL / Hapag-Lloyd	9 ships (from 4,211 - 4,800 teu)
Evergreen Line / COSCO / PIL / ONE / GSL / OOCL - Far East-South Africa service - Central China Loop	OOCL / Evergreen Line / COSCO Shipping / Gold Star Line / ONE (Ocean Network Express) / Slotters: Hapag-Lloyd / Zim	8 ships (from 4,253 - 5,364 teu)
Maersk / CMA CGM / COSCO / NileDutch / PIL - Asia-Africa service (FEW 6 / ASAF / WAX 4/ FA 1)	NileDutch / CMA CGM / Maersk A/S / COSCO Shipping / Slotters: OOCL / Hamburg Süd	12 ships (from 6,477 - 8,814 teu)
Maersk / COSCO - Far East-East Africa service (Mashariki Express / EAX 1)	COSCO Shipping / Maersk A/S / Slotters: OOCL	7 ships (from 3,003 - 3,586 teu)
Maersk / COSCO - SE Asia-East Africa service (Mazuri Express / EAX 2)	Maersk A/S / COSCO Shipping	5 ships (from 2,478 - 2,741 teu)
MSC - Asia-Africa service (Africa Express)	MSC	11 ships (from 8,089 - 14,036 teu)
MSC / ONE / Hapag-Lloyd - Asia-ECSA joint service (Ipanema / SX1 / AS2)	MSC / ONE (Ocean Network Express) / Hapag-Lloyd / Slotters: Maersk A/S / Hamburg Süd	13 ships (from 8,772 - 11,923 teu)
ONE / Hapag-Lloyd / GSL - Asia-East Africa service (EAF / EA3 / CEA)	ONE (Ocean Network Express) / Hapag-Lloyd / Gold Star Line / Zim	7 ships (from 2,646 - 2,824 teu)
PIL - East Asia-South & West Africa service (SWS)	PIL	15 ships (from 3,075 - 3,889 teu)
PIL - Asia-East Africa service (EAS)	PIL	8 ships (from 2,754 - 4,253 teu)
PIL - Asia-Mascareignes-Mozambique service (MZS)	PIL	5 ships
Services Asia / West Africa		
COSCO / ONE / Gold Star Line - Asia-West Africa service (WA 1 / WAX 1 / FAX)	COSCO Shipping / ONE (Ocean Network Express) / Gold Star Line / Slotters: Zim / OOCL	12 ships (from 4,250 - 5,466 teu)
COSCO / OOCL / ONE / GSL - Asia-West Africa service (WAX 3 / WAF 3 / SW2 / FA2)	COSCO Shipping / ONE (Ocean Network Express) / Gold Star Line / OOCL / Slotters: CMA CGM / Zim	12 ships (from 3,398 - 4,530 teu)
Maersk / CMA CGM - Asia-Africa service (FEW 1 / WAX 1)	CMA CGM / Slotters: Maersk A/S	12 ships (from 3,388 - 6,758 teu)
Maersk / CMA CGM - Asia-Africa service (FEW 2 / WAX 3)	Maersk A/S / Slotters: CMA CGM	15 ships (from 4,496 - 5,466 teu)
Maersk / CMA CGM - Asia-Africa service (FEW 3 / AFEX) (New Africa Express)	Maersk A/S / Slotters: CMA CGM	13 ships (from 4,496 - 5,466 teu)
Far East / East Coast of South America + NCSA + Caribbean		

Service	Partner	Ships Deployed
CMA CGM / COSCO / Evergreen / Yang Ming - Asia-ECSA joint service	CMA CGM / COSCO Shipping / Evergreen Line / Yang Ming Marine Transport Corp. / Slotters: OOCL / PIL	12 ships (from 8,452 - 12,726 teu)
Extra sailers (Asia-ECSA)	CMA CGM / COSCO Shipping	fleet varies
Maersk / Hamburg Süd - Asia-ECSA service (Asia 1)	Maersk A/S / Hamburg Süd / Slotters: Hapag-Lloyd / ONE (Ocean Network Express) / HMM Co Ltd / Zim	13 ships (from 8,714 - 9,030 teu)
PIL / COSCO / CMA CGM / Evergreen - Asia-ECSA service (SSA / ESA2 / SEAS2 / ESA3) (OOCL : TLA2)	CMA CGM / Evergreen Line / COSCO Shipping / PIL / Slotters: OOCL	11 ships (from 4,800 - 7,403 teu)
Asia / ANZ + Oceania		
ANL (Perkins ANL Express - PAX) - Darwin & Timor service	ANL / Slotters: CMA CGM	2 ships (from 618 - 1,102 teu)
ASC Liner Service (Andersen Shipping Co) - Singapore-West Australia + Cocos & X-Mas Islands service (NWEL 2)	ASC Liner Services	1 ships (from 367 - 367 teu)
Asia Australia Alliance 'Triple A' - Australian Express Service (AAA 1)	OOCL / PIL / Slotters: COSCO Shipping / Yang Ming Marine Transport Corp. / Advance Container Line (ACL)	5 ships (from 4,253 - 4,578 teu)
Asia Australia Alliance 'Triple A' - Australian Express Service (AAA 2)	OOCL / PIL / COSCO Shipping / Slotters: Yang Ming Marine Transport Corp.	5 ships (from 4,253 - 5,888 teu)
Bengal Tiger Line / Rio Tinto – Singapore-Pilabara service	Rio Tinto / Bengal Tiger Line / Slotters: Toll Transport	1 ships (from 618 - 618 teu)
Hapag-Lloyd / ANL / Maersk / ONE - SE Asia Australia service 1	Hapag-Lloyd / ANL / Maersk A/S / ONE (Ocean Network Express) / Slotters: Hamburg Süd / CMA CGM	6 ships (from 4,730 - 10,622 teu)
Hapag-Lloyd / ANL / Maersk / ONE - SE Asia Australia service 2	Hapag-Lloyd / ANL / Maersk A/S / Slotters: ONE (Ocean Network Express) / Hamburg Süd / CMA CGM	6 ships (from 5,782 - 7,323 teu)
Hapag-Lloyd / OOCL / COSCO - SE Asia Australia Container service (SAL / ASA / ASAL) (PIL : AA3)	Hapag-Lloyd / OOCL / COSCO Shipping / Slotters: PIL	5 ships (from 4,178 - 4,578 teu)
Maersk - SE Asia-New Zealand relay service (Southern Star) (ONE : NZ1)	Maersk A/S / Slotters: ONE (Ocean Network Express)	7 ships (from 5,560 - 5,905 teu)
MSC - SE Asia-ANZ 'New Capricorn' service	MSC	6 ships (from 2,566 - 4,363 teu)
MSC - SE Asia-ANZ 'New Kiwi Express' service	MSC	6 ships (from 3,398 - 4,253 teu)
ONE - West Australia Relay service (Fremantle Express) (WAU)	ONE (Ocean Network Express)	2 ships (from 1,708 - 1,708 teu)

Service	Partner	Ships Deployed
OOCL / COSCO - Singapore-West Australia service (AWX / ASAX)	COSCO Shipping / OOCL	2 ships (from 1,732 - 1,740 teu)
PIL / OOCL / APL / ANL / COSCO - SE Asia-ANZ joint service (NZS / NZX / NZS / KIX / NZE)	PIL / OOCL / ANL / COSCO Shipping / Slotters: Neptune Pacific Direct Line / APL / CMA CGM	6 ships (from 4,330 - 5,075 teu)
Swire Shipping - East Asia-New Zealand-South Pacific service (ESEA)	Swire Shipping / Slotters: Pacific Forum Line	3 ships (from 2,082 - 2,082 teu)
Other services to/from ANZ and services plying the South Pacific Islands		
ANL - Port Kelang-Sg-PNG service (PNG feeder service - APR)	ANL / Slotters: CMA CGM	2 ships (from 1,634 - 1,732 teu)
Swire Shipping - SE Asia-PNG service 1 (Challenger loop)	Swire Shipping / Slotters: New Pacific Line / Carpenters Shipping	2 ships (from 2,381 - 2,381 teu)
Swire Shipping / Carpenters - SE Asia-PNG service 2 (New Guinea Shuttle)	Swire Shipping / Carpenters Shipping	2 ships (from 2,381 - 2,381 teu)
Intra Asia services - NE Asia-SE Asia		
CNC - Japan-Straits Express (JPX)	CNC / Slotters: China United Lines / KMTC / HMM Co Ltd / CMA CGM / New Golden Sea Shipping Pte Ltd (GSS) / COSCO Shipping	4 ships (from 2,782 - 3,635 teu)
CNC / SITC - China-SE Asia-Chittagong feeder service (BBX 2 / CBX)	SITC (Shandong Int'l Shg Co) / CNC / Slotters: CMA CGM	5 ships (from 1,808 - 2,202 teu)
CNC / TS Lines / KMTC - Korea-China-Malaysia service 2 (KCM 2) (YM : PA3) (HMM : KM2)	CNC / TS Lines / KMTC / Slotters: Heung-A Line / HMM Co Ltd / OOCL / COSCO Shipping / Yang Ming Marine Transport Corp. / X-Press Feeders Group	4 ships (from 4,252 - 4,800 teu)
CNC / Wan Hai - Kaohsiung-China-Straits service (CS1 / KCS)	Wan Hai Lines / CNC / Slotters: Gold Star Line / Zim / ONE (Ocean Network Express) / Feedertech Pte Ltd / CMA CGM / Samudera	3 ships (from 2,741 - 6,030 teu)
CNC / Yang Ming / TS Lines / Gold Star Line - China-Malaysia service (CMS) (GSL : CM1) (RCL : RMC)	Yang Ming Marine Transport Corp. / TS Lines / Gold Star Line / CNC / Slotters: Maersk A/S / COSCO Shipping / RCL (Regional Container Line) / Zim	4 ships (from 4,253 - 4,367 teu)
COSCO - China-Indonesia service (CSE)	COSCO Shipping / Slotters: OOCL / KMTC	4 ships (from 4,250 - 4,253 teu)
COSCO / OOCL - China Straits Service 1 (PA1 / CSS1) (YM : PA1)	COSCO Shipping / OOCL / Slotters: Yang Ming Marine Transport Corp. / KMTC	4 ships (from 4,800 - 5,816 teu)
COSCO / OOCL - China Straits Service 2 (CME / CSS2) (CNC : CMS2)	COSCO Shipping / OOCL / Slotters: CNC	4 ships (from 4,250 - 4,253 teu)
Evergreen - Japan (Kanto)-Malaysia service (NSD)	Evergreen Line / Slotters: CNC / Yang Ming Marine Transport Corp.	4 ships (from 2,870 - 2,910 teu)

Service	Partner	Ships Deployed
Evergreen - Korea-Taiwan-Straits service (via Phil. n/b) (NSB)	Evergreen Line / Slotters: CNC / Sinokor / X-Press Feeders Group / ONE (Ocean Network Express)	4 ships (from 2,870 - 2,910 teu)
HMM / KMTC / Sinokor - Korea-Indonesia service 2 (KI 2)	HMM Co Ltd / KMTC / Sinokor / Slotters: Heung-A Line / CNC / CK Line / ONE (Ocean Network Express)	4 ships (from 4,275 - 4,728 teu)
HMM / KMTC / Sinokor / Heung-A - Korea-Indonesia service 1 (KI 1)	Heung-A Line / HMM Co Ltd / KMTC / Sinokor	4 ships (from 4,231 - 4,275 teu)
KMTC - Korea-China-Malaysia service (KMSK)	KMTC / Slotters: Heung-A Line / Sinotrans	4 ships (from 2,778 - 2,826 teu)
KMTC / TS Lines / HMM - Korea-China-Malaysia service (KCM)	HMM Co Ltd / KMTC / TS Lines / Slotters: SITC (Shandong Int'l Shg Co) / Heung-A Line / CNC	4 ships (from 2,553 - 4,728 teu)
Maersk / Sealand Asia - China-SE Asia service (IA-8)	Sealand Asia / Slotters: TS Lines / Maersk A/S	6 ships (from 5,570 - 6,080 teu)
Maersk / Sealand Asia - NE Asia-SE Asia service (IA-1)	Sealand Asia / Slotters: TS Lines / Maersk A/S / Sakhalin Shipping Co (SASCO)	7 ships (from 4,245 - 4,380 teu)
Maersk / Sealand Asia - Taiwan-S. China-SE Asia service (IA-12)	Sealand Asia / Slotters: Yang Ming Marine Transport Corp. / Maersk A/S	5 ships (from 1,713 - 2,286 teu)
Maersk / Sealand Asia - Taiwan-S. China-SE Asia service (IA-3)	Sealand Asia / Slotters: Yang Ming Marine Transport Corp. / CNC / TS Lines / Maersk A/S	4 ships (from 4,132 - 4,431 teu)
MSC - China-SE Asia service (Seagull)	MSC	4 ships (from 3,424 - 4,814 teu)
MSC - Japan-SE Asia service (New Origami)	MSC	4 ships (from 2,526 - 3,424 teu)
MSC - Qingdao-South China-Straits service (Orchid)	MSC	4 ships (from 2,492 - 3,501 teu)
MSC - Straits-East Asia service (Seahorse)	MSC	3 ships (from 2,474 - 2,564 teu)
ONE - Japan Straits Malaysia 1 (JSM) (OOCL : KTX 5) (IAL : NS2)	ONE (Ocean Network Express) / Slotters: TS Lines / PIL / Interasia Lines (IAL) / Wan Hai Lines / OOCL	4 ships (from 4,922 - 5,294 teu)
ONE / Hapag-Lloyd - Japan Straits Indonesia (JID / JSJ)	ONE (Ocean Network Express) / Hapag-Lloyd	4 ships (from 4,432 - 5,527 teu)
OOCL - Japan-South China-Indonesia service (KTX 3)	OOCL / Slotters: Shanghai Pan Asia Shipping Co / New Golden Sea Shipping Pte Ltd (GSS) / COSCO Shipping / Samudera	4 ships (from 4,258 - 4,583 teu)
OOCL - Japan-Taiwan-South China-Vietnam-Straits service (KTX 1)	OOCL / Slotters: RCL (Regional Container Line) / Interasia Lines (IAL) / COSCO Shipping / New Golden Sea Shipping Pte Ltd (GSS)	4 ships (from 2,202 - 2,782 teu)

Service	Partner	Ships Deployed
Wan Hai - Japan (Kanto)-Taiwan-Straits-Malaysia service (JTS) (Kanto Major service)	Wan Hai Lines / Slotters: Interasia Lines (IAL) / PIL	4 ships (from 2,304 - 3,055 teu)
Wan Hai - Korea-Taiwan-Straits service (KSS)	Wan Hai Lines / Slotters: Interasia Lines (IAL)	4 ships (from 1,708 - 2,702 teu)
Wan Hai - Korea-Taiwan-Vietnam-Straits service (KVS)	Wan Hai Lines / Slotters: Interasia Lines (IAL)	4 ships (from 2,495 - 2,495 teu)
Wan Hai / Interasia Lines - Japan Straits 'Super Express 3' / NS 3	Wan Hai Lines / Interasia Lines (IAL)	4 ships (from 2,732 - 3,055 teu)
Wan Hai / Interasia Lines / OOCL - Japan Straits 'Super Express 1' (NS 1) / KTX6 (ONE : JSM3)	Wan Hai Lines / Interasia Lines (IAL) / OOCL / Slotters: ONE (Ocean Network Express)	4 ships (from 4,252 - 4,578 teu)
X-Press Feeders / KMTC / RCL / SITC / Gold Star Line - North China Straits Express (NCX)	X-Press Feeders Group / KMTC / SITC (Shandong Int'l Shg Co) / RCL (Regional Container Line) / Gold Star Line / Slotters: Zim	4 ships (from 2,588 - 2,824 teu)
Yang Ming - Japan-Taiwan-South China-SE Asia service (JTS)	Yang Ming Marine Transport Corp. / Slotters: Sealand Asia / Gold Star Line / Zim / TS Lines / CNC / Interasia Lines (IAL) / Evergreen Line	4 ships (from 2,940 - 2,940 teu)
Intra Asia services - NE Asia only		
Yang Ming / TS Lines / KMTC / Gold Star Line - Japan-Straits-Vietnam service (JMV)	Yang Ming Marine Transport Corp. / TS Lines / KMTC / Gold Star Line / Slotters: CNC / Zim	4 ships (from 2,556 - 2,940 teu)
Intra Asia services - SE Asia only		
Bintang Mas Shipping - Eastern Malaysia & Brunei services	Bintang Mas Shipping	fleet varies
CNC - Djakarta-Panjang Express 1 (DPX)	CNC	1 ships
CNC - Straits-Northern Vietnam service (HSF 1)	CNC / Slotters: CMA CGM / COSCO Shipping	2 ships (from 1,717 - 1,717 teu)
CNC / PIL - Straits-South Philippines Express (SPX / SPE) (RCL : RSP) (SL Asia : PHI 3) (ONE : SPE) (HMM : DSX)	PIL / CNC / Slotters: Sealand Asia / RCL (Regional Container Line) / Samudera / ONE (Ocean Network Express) / Wan Hai Lines / Advance Container Line (ACL)	2 ships (from 2,190 - 2,357 teu)
Continental Shipping Line (CSL) / ONE - Singapore-Yangon-Port Kelang service (TMM)	ONE (Ocean Network Express) / Continental Shipping Line / Slotters: CNC / CMA CGM / OOCL / Samudera	1 ships (from 1,471 - 1,471 teu)
COSCO (NGSS) - Malaysia-Indonesia service (GMI) (RCL : RMI)	COSCO Shipping / Slotters: RCL (Regional Container Line) / OOCL / New Golden Sea Shipping Pte Ltd (GSS)	2 ships (from 1,577 - 2,741 teu)
COSCO - Singapore-Thailand-Indonesia service (MTS)	COSCO Shipping	1 ships (from 1,471 - 1,471 teu)

Service	Partner	Ships Deployed
Evergreen - Malaysia Express Service (IMX)	Evergreen Line	1 ships (from 1,708 - 1,708 teu)
Evergreen - South China-Vietnam-Malaysia service (CVM)	Evergreen Line / Slotters: TS Lines	2 ships (from 1,618 - 1,618 teu)
Evergreen - Straits-Yangon service (SYS)	Evergreen Line	1 ships (from 1,164 - 1,164 teu)
Evergreen - Thailand Indonesia Express (TIX)	Evergreen Line	2 ships (from 2,458 - 2,553 teu)
Evergreen - Vietnam-Singapore-Malaysia service (VSM) (X-Press : VSX) (RCL : RPV) (PIL : SSP)	Evergreen Line / Slotters: Advance Container Line (ACL) / PIL / X-Press Feeders Group / TS Lines / RCL (Regional Container Line)	2 ships (from 2,553 - 2,553 teu)
Gold Star Line / OOCL / Yang Ming - Thailand Indonesia Express (ITS / ITX)	Yang Ming Marine Transport Corp. / Gold Star Line / OOCL / Slotters: CNC / RCL (Regional Container Line) / CMA CGM / Zim	3 ships (from 1,645 - 1,805 teu)
Gold Star Line / RCL – Vietnam Malaysia Service (VMS / RHS3)	RCL (Regional Container Line) / Gold Star Line / Slotters: Zim / X-Press Feeders Group	1 ships (from 1,248 - 1,248 teu)
Golden Sea Shipping / OOCL - Vietnam-Thailand-Straits Express (VTS)	New Golden Sea Shipping Pte Ltd (GSS) / OOCL / Slotters: COSCO Shipping	3 ships (from 1,440 - 1,718 teu)
Harbour-Link Group Berhad / AML Shipping Sdn Bhd - Western Malaysia-Eastern Malaysia (Sarawak) services + Brunei service	Harbour-Link Group Berhad / Slotters: PDZ Lines	5 ships (from 570 - 1,032 teu)
Maersk / Sealand Asia - Belawan feeder (BTS 1)	Sealand Asia / Slotters: Maersk A/S / CMA CGM	1 ships (from 1,560 - 1,560 teu)
Maersk / Sealand Asia - Malaysia feeder service (MA1)	Sealand Asia / Slotters: Maersk A/S	1 ships (from 1,740 - 1,740 teu)
Maersk / Sealand Asia - Straits-Southern Vietnam feeder (SVN 2)	Sealand Asia / Slotters: Maersk A/S	1 ships (from 2,824 - 2,824 teu)
Maersk / Sealand Asia - Straits-Vietnam feeder service (SE1)	Sealand Asia / Slotters: Maersk A/S	2 ships (from 1,756 - 2,082 teu)
Maersk / Sealand Asia - Straits-Vietnam feeder service (SE2)	Sealand Asia / Slotters: Maersk A/S	2 ships (from 2,586 - 2,754 teu)
MSC - Java Express	MSC / Slotters: Zim / Gold Star Line	3 ships (from 1,850 - 2,732 teu)
MSC - Malacca Express	MSC	1 ships (from 2,588 - 2,588 teu)
MSC - Thai Express	MSC	1 ships (from 2,556 - 2,556 teu)
ONE / RCL - Straits-Thailand-Indonesia service 1 (TID1 / RTI1) (Samudera : APX) (CNC : TMX)	RCL (Regional Container Line) / ONE (Ocean Network Express) / Slotters: HMM Co Ltd / Samudera / CMA CGM / CNC	2 ships (from 2,526 - 2,553 teu)

Service	Partner	Ships Deployed
ONE / RCL - Straits-Thailand-Indonesia service 2 (TID2 / RTI2) (CNC : TIX)	ONE (Ocean Network Express) / RCL (Regional Container Line) / Slotters: OOCL / Sinokor / X-Press Feeders Group / CMA CGM / CNC	2 ships (from 2,824 - 4,256 teu)
ONE / Samudera - Straits-Philippines service (PHX) (COSCO : NP1) (HMM : JSS)	ONE (Ocean Network Express) / Slotters: Samudera / PIL / Advance Container Line (ACL) / HMM Co Ltd / OOCL / Hapag-Lloyd / COSCO Shipping	2 ships (from 4,253 - 4,275 teu)
OOCL - Belawan & Malaysia service (BSS)	OOCL / Slotters: COSCO Shipping	1 ships (from 1,713 - 1,740 teu)
OOCL / COSCO - Straits-Vietnam service (VJS)	OOCL / COSCO Shipping	2 ships (from 1,236 - 1,714 teu)
OOCL – Vietnam Straits Express (VSX)	OOCL / Slotters: Samudera / COSCO Shipping	1 ships (from 1,696 - 1,696 teu)
Pacific Carriers Ltd - PACC Feeder - Singapore-Pontianak shuttle	PACC Container Line / Slotters: Samudera	1 ships (from 295 - 295 teu)
PIL / MELL - Singapore-Surabaya-Dili service	Mariana Express Lines / Slotters: Swire Shipping / Neptune Pacific Direct Line / PIL	1 ships (from 604 - 604 teu)
PIL-ACL - Pasir Gudang Shuttle Service (PGS)	PIL / Slotters: Advance Container Line (ACL) / Samudera	1 ships (from 604 - 604 teu)
PIL-ACL - Straits-Eastern Malaysia & Borneo service (KKS)	PIL / Slotters: Sealand Asia / COSCO Shipping / Advance Container Line (ACL)	1 ships (from 604 - 604 teu)
PIL-ACL - Thailand service (BK1) (Samudera : BKX1) (COSCO : BKX3)	PIL / Slotters: CNC / Samudera / COSCO Shipping / Advance Container Line (ACL)	1 ships (from 1,080 - 1,080 teu)
PIL-ACL - Vietnam China service (VCS)	PIL / Slotters: ONE (Ocean Network Express) / Advance Container Line (ACL)	2 ships (from 1,802 - 1,802 teu)
PIL-ACL - Vietnam feeder service (VNS)	PIL / Slotters: OOCL / CMA CGM / CNC / Advance Container Line (ACL)	1 ships (from 1,730 - 1,730 teu)
PIL-ACL -Singapore-Thailand-Qinzhou service (SQS)	PIL / Slotters: OOCL / Advance Container Line (ACL)	2 ships (from 728 - 938 teu)
PIL-ACL / MTT Shg - Straits-Eastern Malaysia & Borneo service 1 (NBS / WKL)	PIL / MTT Shipping / Slotters: Advance Container Line (ACL)	2 ships (from 1,166 - 1,802 teu)
PIL-ACL / Samudera - Singapore-Yangon service (YGS / YGN)	PIL / Slotters: Samudera / CNC / CMA CGM / ONE (Ocean Network Express) / OOCL / Advance Container Line (ACL)	1 ships (from 1,080 - 1,080 teu)
RCL - Palembang Express (RPE)	RCL (Regional Container Line)	1 ships (from 390 - 390 teu)
RCL - Singapore-Ho Chi Minh City shuttle (RHS8)	RCL (Regional Container Line) / Slotters: Gold Star Line / Zim / OOCL / CMA CGM / PIL / Advance Container Line (ACL) / CNC	1 ships (from 1,288 - 1,288 teu)

Service	Partner	Ships Deployed
RCL - Singapore-Malaysia feeders (RMS13) (COSCO : SMS)	RCL (Regional Container Line) / Slotters: CNC / ONE (Ocean Network Express) / COSCO Shipping	1 ships (from 1,108 - 1,108 teu)
RCL - Singapore-Sihanoukville service (RCL Cambodia Express - RCX)	RCL (Regional Container Line) / Slotters: Zim / Gold Star Line / Yang Ming Marine Transport Corp. / CMA CGM / CNC	1 ships (from 628 - 628 teu)
RCL - Singapore-Songkhla service (RCL Songkhla Express - RSE)	RCL (Regional Container Line) / Slotters: Yang Ming Marine Transport Corp. / CMA CGM / CNC	1 ships (from 1,018 - 1,018 teu)
RCL - Singapore-Thailand-Belawan-PK service (Thailand Belawan Express - RTB) (YM : SE5) (GSL : RB1)	CNC / RCL (Regional Container Line) / Slotters: Yang Ming Marine Transport Corp. / Gold Star Line / Zim / ONE (Ocean Network Express) / CMA CGM / OOCL	2 ships (from 1,200 - 1,248 teu)
Samudera - Singapore-Belawan service (BLW)	Samudera / Slotters: ONE (Ocean Network Express) / CNC / PIL / Advance Container Line (ACL)	1 ships (from 1,048 - 1,048 teu)
Samudera - Singapore-Indonesia services - Palembang loop (PLM)	Samudera / Slotters: CNC / ONE (Ocean Network Express)	1 ships (from 609 - 609 teu)
Samudera - Singapore-Kuantan-Songkhla service (SGX) (PIL : TH3)	Samudera / Slotters: PIL / Advance Container Line (ACL) / ONE (Ocean Network Express)	1 ships (from 1,118 - 1,118 teu)
Samudera - Singapore-Penang service (MSX)	Samudera / Slotters: OOCL / ONE (Ocean Network Express)	1 ships (from 1,802 - 1,802 teu)
Samudera - Singapore-Thailand-Malaysia-Vietnam service (BKX3 + CVS)	Samudera / Slotters: ONE (Ocean Network Express) / CNC / Yang Ming Marine Transport Corp. / PIL / Advance Container Line (ACL)	3 ships (from 1,054 - 1,054 teu)
Samudera - Straits-Central Vietnam service (CVS)	Samudera / Slotters: CNC / ONE (Ocean Network Express) / COSCO Shipping	1 ships
Samudera / COSCO - Singapore-Indonesia services - Semarang loop (SRG / SRX1 / SRX2) (HMM : SR1)	Samudera / COSCO Shipping / Slotters: Hapag-Lloyd / CNC / PIL / Advance Container Line (ACL) / OOCL / ONE (Ocean Network Express) / HMM Co Ltd	2 ships (from 1,296 - 1,900 teu)
Samudera / COSCO - Straits-Northern Vietnam service (NVS 1 / NVX)	Samudera / COSCO Shipping / Slotters: CNC / ONE (Ocean Network Express) / CMA CGM	2 ships (from 1,496 - 1,645 teu)
Samudera / COSCO - Straits-Southern Vietnam & Indonesia service (HCX+JKT / IHX)	Samudera / COSCO Shipping / Slotters: Hapag-Lloyd / ONE (Ocean Network Express) / PIL / CMA CGM / CNC / Advance Container Line (ACL)	2 ships (from 2,226 - 2,544 teu)
Samudera / COSCO-OOCL / ONE / X-Press Feeders / PIL-ACL - Singapore-Indonesia services - Surabaya loop (SUB / SSX / SSX1 / SSX / SUS) (OOCL : SBY) (HMM : SB2)	Samudera / COSCO Shipping / ONE (Ocean Network Express) / OOCL / Advance Container Line (ACL) / X-Press Feeders Group / PIL / Slotters: Evergreen Line / HMM Co Ltd / CMA CGM / Yang Ming Marine Transport Corp. / Wan Hai Lines / Hapag-Lloyd / RCL (Regional Container Line)	3 ships (from 1,708 - 2,714 teu)

Service	Partner	Ships Deployed
Samudera / PIL - Singapore-Cambodia service (Cambodia Express Service - CES) (HMM : SK1) (ONE : SIH)	Samudera / Slotters: PIL / ONE (Ocean Network Express) / OOCL / HMM Co Ltd / Advance Container Line (ACL)	1 ships (from 2,174 - 2,174 teu)
Sealand Asia - Straits-Indonesia service (IN3)	Sealand Asia / Slotters: Maersk A/S / MSC	1 ships (from 1,005 - 1,005 teu)
Sealand Asia - Straits-Mongla feeder (BA1)	Sealand Asia / Slotters: Maersk A/S / CMA CGM	1 ships (from 1,118 - 1,118 teu)
Shin Yang Shipping Sdn Bhd (Syscorp) - Singapore-Western and Eastern Malaysia service	Shin Yang Shipping Sdn Bhd	fleet varies
Wan Hai - Thailand & Belawan 'butterfly' service (TBS)	Wan Hai Lines / Slotters: COSCO Shipping / X-Press Feeders Group / Evergreen Line	2 ships (from 1,440 - 1,440 teu)
X-Press Feeders - Pasir Gudang X-Press (PGX)	X-Press Feeders Group	1 ships (from 610 - 610 teu)
X-Press Feeders - Straits Ho Chi Minh X-press (SHX)	X-Press Feeders Group / Slotters: Hapag-Lloyd / CNC	1 ships (from 1,794 - 1,794 teu)
X-Press Feeders - Thailand-Singapore X-Press service (TSX) (CMA CGM : LCX)	X-Press Feeders Group / Slotters: CMA CGM / APL	1 ships (from 2,782 - 2,782 teu)
Yang Ming - Straits-Vietnam service (SE 8)	Yang Ming Marine Transport Corp. / Slotters: Maersk A/S / X-Press Feeders Group	2 ships (from 1,500 - 1,803 teu)
Yang Ming - Taiwan South East Asia Service (TSE)	Yang Ming Marine Transport Corp. / Slotters: X-Press Feeders Group / PIL / Advance Container Line (ACL) / CNC / Kanway Shipping	4 ships (from 1,500 - 1,803 teu)
Intra Asia services - South China, Taiwan, Philippines and Vietnam local services		
Singapore intra port shuttles		fleet varies

Source: Alphaliner