



SELA – UNCTAD

Round table: Challenges faced by developing countries in the competition and regulation in the maritime transport sector

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Cartel Investigations:

- 2016: Maritime transport by Roll-on Roll-off ships
- 2010: Air and maritime international freight forwarder

Transactions

- 2017: 1 merger
 - 1 control acquisition
 - 1 VSA
 - 1 JV
- 2016: 1 merger
 - 1 SCA
 - 1 control acquisition
- 2014: 1 merger

Query Procedures:

- 2017: Questioning if VSA's are of mandatory notification
- 2016: Questioning if SCA's are of mandatory notification

30 main operators market share

TOP 100 **Alphaliner TOP 100 / 29 Jun 2018** 

Global figures



6,134 active ships
including 5,267 fully cellular



22,297,703 TEU
21,886,213 TEU fully cellular



272,300,709 DWT

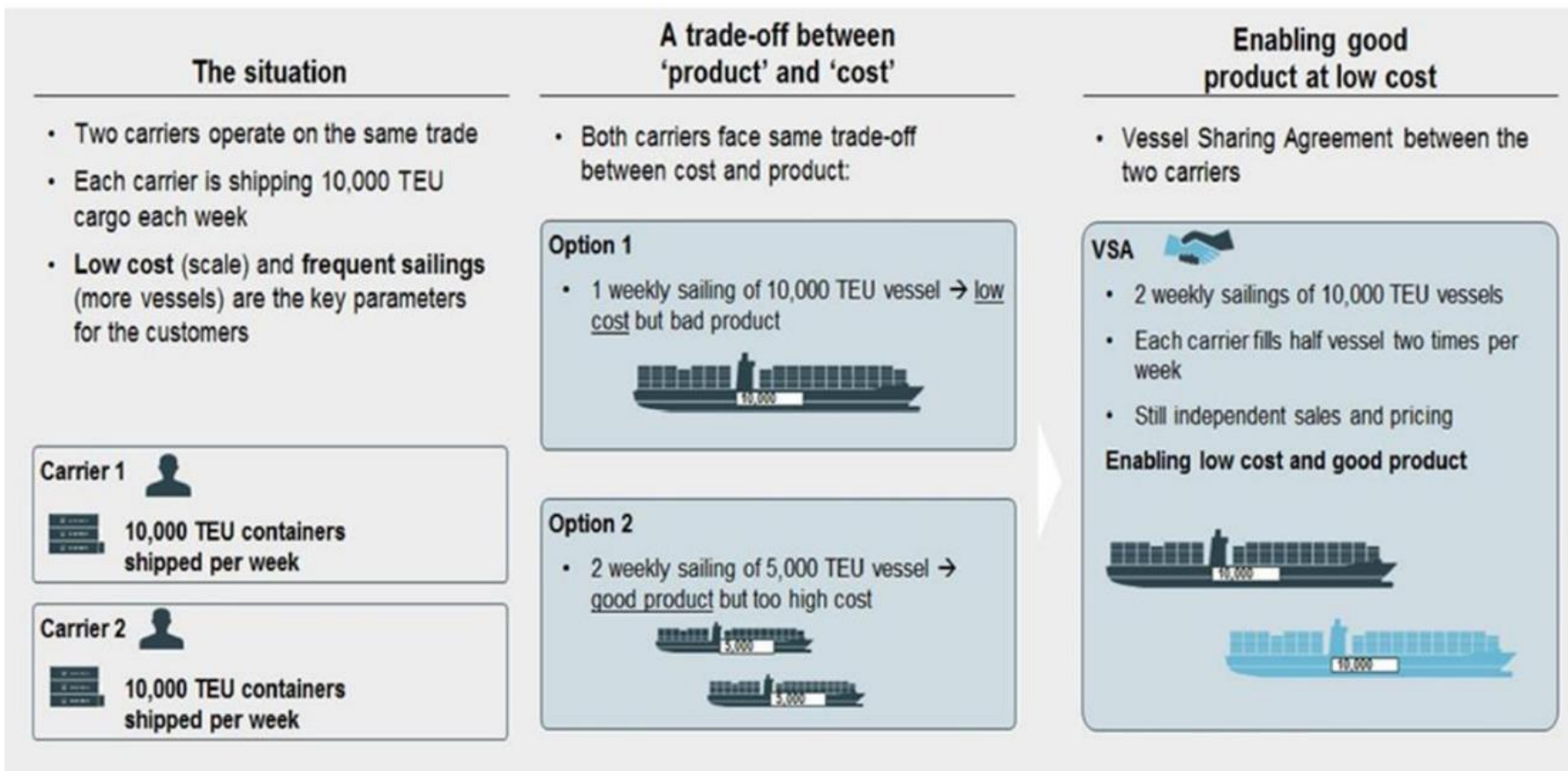
Figures are consolidated

Regional Trades
weekly capacities

Trans-Atlantic **138,739** TEU
Trans-Pacific **472,406** TEU
Feast-Europe **399,881** TEU

| Rank | Operator | Teu | Share | Existing fleet | Orderbook |
|------|----------------------------------|-----------|-------|----------------|-----------|
| 1 | APM-Maersk | 4,079,193 | 18.3% | | |
| 2 | Mediterranean Shg Co | 3,290,587 | 14.8% | | |
| 3 | CMA CGM Group | 2,604,116 | 11.7% | | |
| 4 | COSCO Shipping Co Ltd | 2,036,206 | 9.1% | | |
| 5 | Hapag-Lloyd | 1,605,152 | 7.2% | | |
| 6 | ONE (Ocean Network Express) | 1,571,459 | 7.0% | | |
| 7 | Evergreen Line | 1,111,594 | 5.0% | | |
| 8 | OOCL | 688,977 | 3.1% | | |
| 9 | Yang Ming Marine Transport Corp. | 631,614 | 2.8% | | |
| 10 | Hyundai M.M. | 413,853 | 1.9% | | |
| 11 | PIL (Pacific Int. Line) | 413,821 | 1.9% | | |
| 12 | Zim | 408,292 | 1.8% | | |
| 13 | Wan Hai Lines | 258,743 | 1.2% | | |
| 14 | X-Press Feeders Group | 137,978 | 0.6% | | |
| 15 | KMTC | 136,389 | 0.6% | | |
| 16 | Antong Holdings (QASC) | 134,603 | 0.6% | | |
| 17 | Zhonggu Logistics Corp. | 125,566 | 0.6% | | |
| 18 | SITC | 109,482 | 0.5% | | |
| 19 | IRISL Group | 96,383 | 0.4% | | |
| 20 | SM Line Corp. | 83,386 | 0.4% | | |
| 21 | Arkas Line / EMES | 72,815 | 0.3% | | |
| 22 | TS Lines | 71,660 | 0.3% | | |
| 23 | Sinotrans | 63,912 | 0.3% | | |
| 24 | Sinokor | 57,146 | 0.3% | | |
| 25 | Salam Pacific Indonesia Lines | 52,273 | 0.2% | | |
| 26 | RCL (Regional Container L.) | 45,568 | 0.2% | | |
| 27 | Grimaldi (Napoli) | 44,773 | 0.2% | | |
| 28 | Emirates Shipping Line | 43,943 | 0.2% | | |
| 29 | UniFeeder | 43,716 | 0.2% | | |
| 30 | Matson | 43,062 | 0.2% | | |

Cooperation among operators

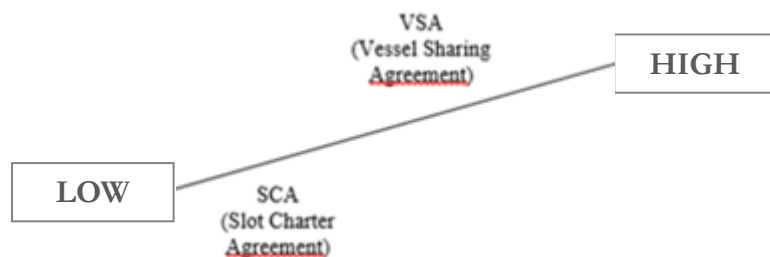


Mandatory notification in Brazil

Art. 90. For the purposes of Article 88 of this Law, a concentration act shall be carried out when:

- I - two (2) or more previously independent companies merge;
- II - one (1) or more companies acquire, directly or indirectly, by purchase or exchange of stocks, shares, bonds or securities convertible into stocks or assets, whether tangible or intangible, by contract or by any other means or way, the control or parts of one or more companies;
- III – one (1) or more companies incorporate one or more companies, or
- IV - two (2) or more companies enter into an **associative contract**, consortium or joint venture.

Level of cooperation among competitors by types of agreement



| Cooperation | VSA | SCA |
|-----------------------------|----------------|---------------------|
| Frequency | Joint decision | Individual decision |
| Slots provision | Yes | Yes |
| Joint operation on the line | Yes | No |
| Selection of the ports | Joint decision | Individual decision |
| Selecion of terminals | Joint decision | Individual decision |



Thank you