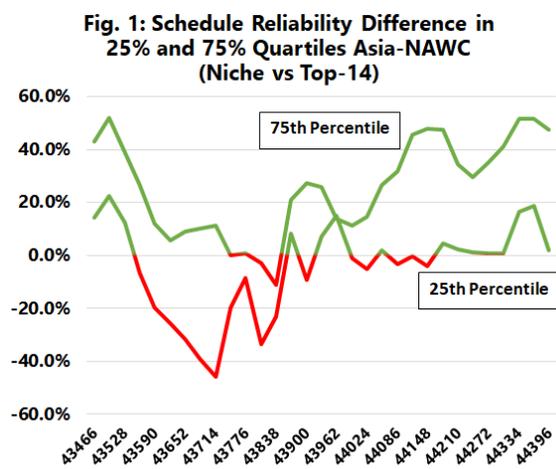


Niche carriers offering better reliability

In issue 531 of the *Sunday Spotlight*, we looked at whether niche carriers had navigated the pandemic better than the global top-14 carriers, in terms of schedule reliability. The top-14 carriers are defined as (in alphabetical order): CMA CGM, COSCO, Evergreen, Hamburg Süd, Hapag-Lloyd, HMM, Maersk, MSC, ONE, OOCL, PIL, Wan Hai, Yang Ming, and ZIM.

As a starting point, we looked at the difference in schedule reliability between the niche and the global top-14 carriers, and we saw that while the long-term normal state of affairs was that the average schedule reliability across the top-14 carriers was higher than across the niche carriers, this changed in August 2020. As the pandemic ripple effects began to disrupt global liner networks, the niche carriers improved substantially, opening up a considerable gap to the top-14 carriers, especially in June and July 2021, with the difference being 8.8 and 11.0 percentage points in favour of the niche carriers.

However, schedule reliability across niche carriers is very varied, ranging from highly reliable niche carriers consistently offering 100% schedule reliability, to carriers that often offer reliability closer to 0%. To better quantify this, we introduced quartiles, matching up the 25% most and least reliable niche carriers against the respective top-14 carrier quartiles. We found that the most reliable niche carriers consistently outperformed the most reliable top-14 carriers, while the least reliable niche carriers are increasingly bridging that gap.



To add an element of comparability, we did the same for Asia-North America West Coast, which has both a large number of niche carriers and has also been affected the most by port congestion. This trade is shown in figure 1. As can be seen, the 25% most reliable niche carriers have almost always outperformed the 25% most reliable top-14 carriers, whereas the 25% least reliable niche carriers are now on par with the 25% least reliable top-14 carriers. This shows that the niche carriers have navigated the pandemic much better than the global top-14 carriers, in terms of schedule reliability.

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All quotes can be attributed to: Alan Murphy, CEO, Sea-Intelligence.

For more information, please contact: ia@sea-intelligence.com, am@sea-intelligence.com

Sea-Intelligence is a leading provider of Research & Analysis, Data Services, and Advisory Services within the global supply chain industry, with a strong focus on container shipping. Combining strong quantitative analytical skills with a deep understanding of the supply chain industry, based on many decades of experience at all central parts of the Ocean supply chain, Sea-Intelligence supports customers across all stakeholder groups.