

## Growth in non-alliance services

The initial disruptions to global supply chains triggered by the pandemic had a profound impact on non-alliance services — those operated independently of existing alliance structures. Many of these services ceased operations on major East-West trade routes. However, the subsequent surge in demand for goods, coupled with rising spot rates, prompted a significant influx of non-alliance capacity into the market. So much so, that even on Asia-North Europe, which had predominantly been an alliance operated trade, saw the entry of several niche carriers offering solitary services.

**Fig. 1: Asia-NAWC Non-Alliance Capacity Share**

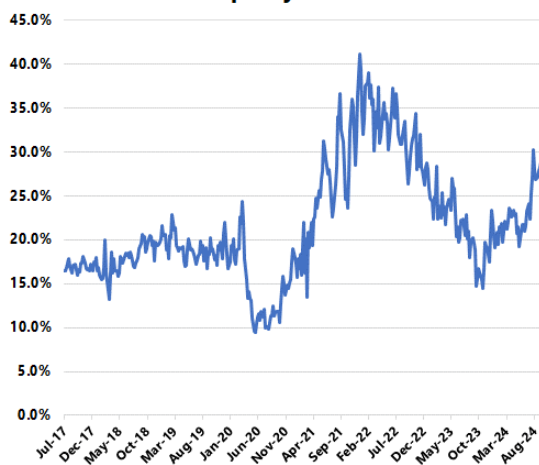


Figure 1 shows the historical share of non-alliance capacity in the Asia to North America West Coast trade, as well as 12 weeks into the future, based on current deployment plans from the shipping lines. As such, the Asia-North America West Coast trade lane is poised to see a sharp increase in the capacity share of non-alliance services in the coming months. The data shows that nearly 30% of the deployed capacity on the trade lane is scheduled to be offered on services that are operated outside of the alliance structures.

We see a similar pattern for Asia-North Europe, but less so for Asia-North America East Coast and Asia-Mediterranean. On Asia-North Europe, if the current 12-week outlook holds, we will see record levels (touching 12%) of non-alliance capacity on the trade lane.

Across the main East-West trades, it is clear that the main driver of the non-alliance share is spot rates; a sharp increase in spot rates during the pandemic triggered a sharp increase in non-alliance services, and vice versa when the spot rates collapsed in the second half of 2022. This pattern is now repeating again, as the sharp spot rate increases seen in recent months, once again coincide with an increase in non-alliance services.

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