

## Asia-NAM and Asia-Europe networks impact 2025

Gemini, Premier Alliance, and MSC have all announced their 2025 networks. Ocean Alliance has not yet announced a '2025' network, and given that the alliance structure continues unchanged, it is reasonable to assume only minor network changes for them. For the rest, we did an extensive overview of the new networks in issue 682 of the *Sunday Spotlight*.

Fig. 1: No of Distinct Port-Pairs

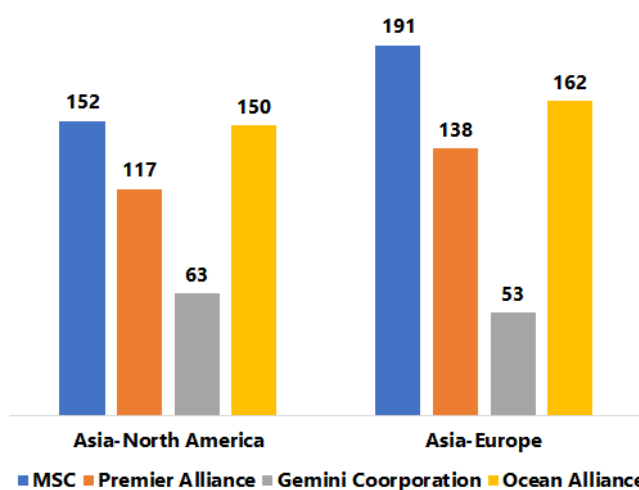


Figure 1 shows the number of distinct port-pairs offered by each alliance (MSC is also referred to as 'alliance' for semantic practicalities) on both Asia-North America and Asia-Europe. 'Distinct' means that one port-pair, even if it is offered on multiple services, is counted only once.

It is not surprising to see Gemini offer far fewer direct port-port pairs, as this is a direct result of a deliberate network design strategy by the alliance, with their greater focus on shuttles. On Asia-Europe, MSC clearly will be offering the most direct port-port combinations, followed by Ocean Alliance, and Premier Alliance. On Asia-North America, MSC and Ocean Alliance both offer the same level of direct connectivity, however Ocean Alliance has a higher call frequency on the port-pairs they offer.

From a shipper perspective, Asia-Europe has some very different service concepts to choose from, with MSC offering 3½ times more direct connections than Gemini. On Asia-North America, there is a high level of competitive pressure from MSC and Ocean Alliance in offering direct connections, while Gemini is following an entirely different strategy.

We also calculated the level of competitiveness across the ports being serviced directly. On both trades, half of the direct port-pairs are offered by a single alliance which gives that alliance a unique product. Conversely, 5%-14% of the direct port-pairs are offered by all four alliances, which will result in strong competitive pressure on those port-pairs.

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