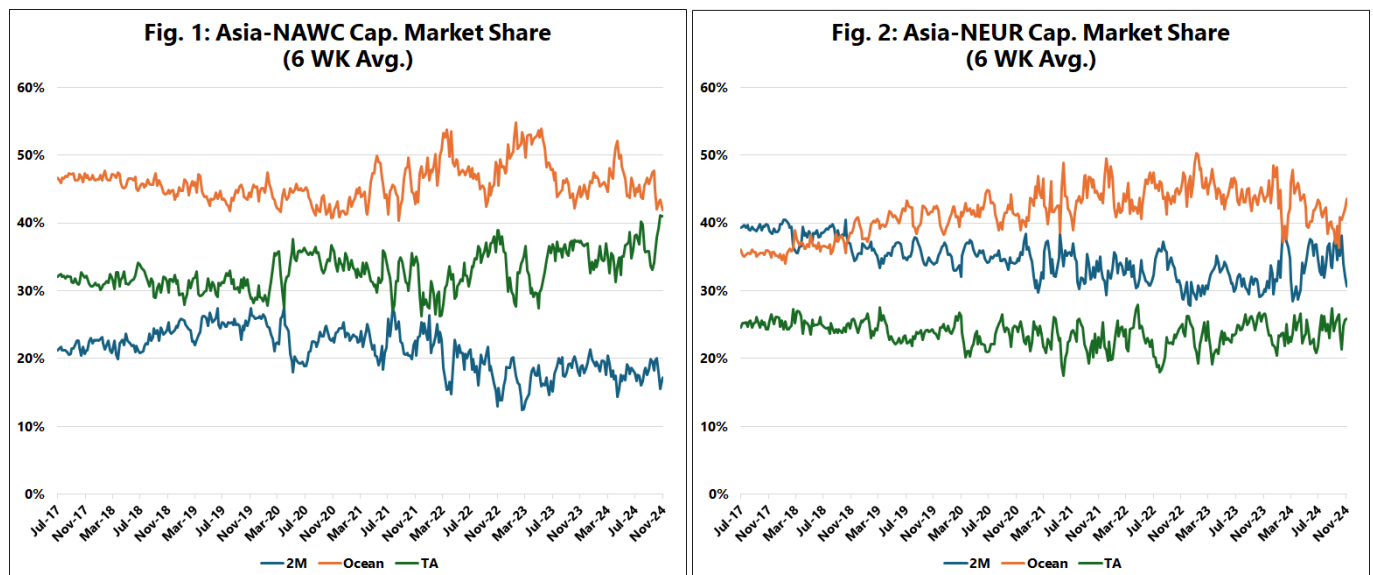


## Alliance capacity market share (2017-2024)

The current three-alliance structure has been in place since April 2017, when Ocean Alliance and THE Alliance launched operationally, alongside the already existing 2M alliance. After nearly 8 years of operations, February 2025 will bring about a new alliance structure.

Capacity market share is an interesting metric to see the extent of the presence of a carrier alliance in any given trade. Figures 1 and 2 show this for the existing three alliances throughout their life cycle so far for Asia-North America West Coast and Asia-North Europe. These figures are in isolation and only show the capacity market share within the alliances.



On Asia-NAWC, Ocean Alliance has by far been the most dominant carrier alliance in terms of deployed capacity, with 2M on the other end. Furthermore, throughout the life cycle of the existing structure, there has hardly been any movement indicating a change in market dynamics. THE Alliance *has* in recent months captured more capacity market share and is closing in on Ocean Alliance. On Asia-NEUR, Ocean Alliance overtook 2M by the end of 2018 as they increased their capacity market share. Since then, Ocean Alliance has maintained the highest capacity market share, with 2M close by. THE Alliance on the other hand, has a clearly different market strategy, maintaining the lowest capacity market share throughout.

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

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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.