

Shipping Survey 2020 – Key Takeaways

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AI in Transportation – Use Case

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Facts and figures of the PwC Germany shipping study 2020

This represents the 12th consecutive shipping study conducted by PwC Germany

Methodology of survey

Telephone Interviews (CATI)
Methodological comparability allows for trend and pattern recognition with regards to the last 11 years (2009 to 2019)

Sampling size

95 key decision-makers from shipping and ship managing companies

Survey period

June to August 2020

Focus of the survey

Container shipping (37 %)
Shipping management (13 %)
Bulkier shipping (13 %)
Multi Purpose (16 %)

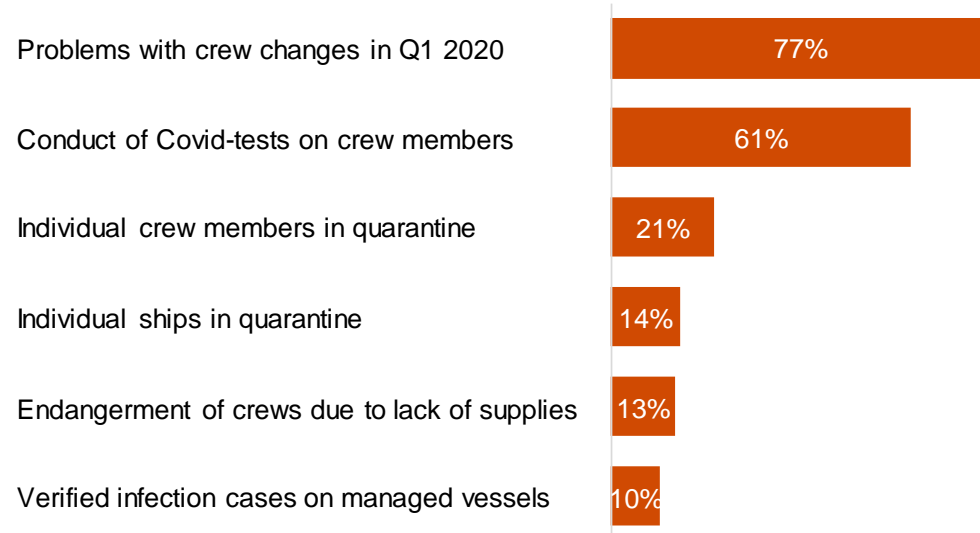
About the companies...

Ø 164 employees on land and 623 on sea
Ø 18.6 ships owned, 22.1 external ships, totaling c. 41 ships under management

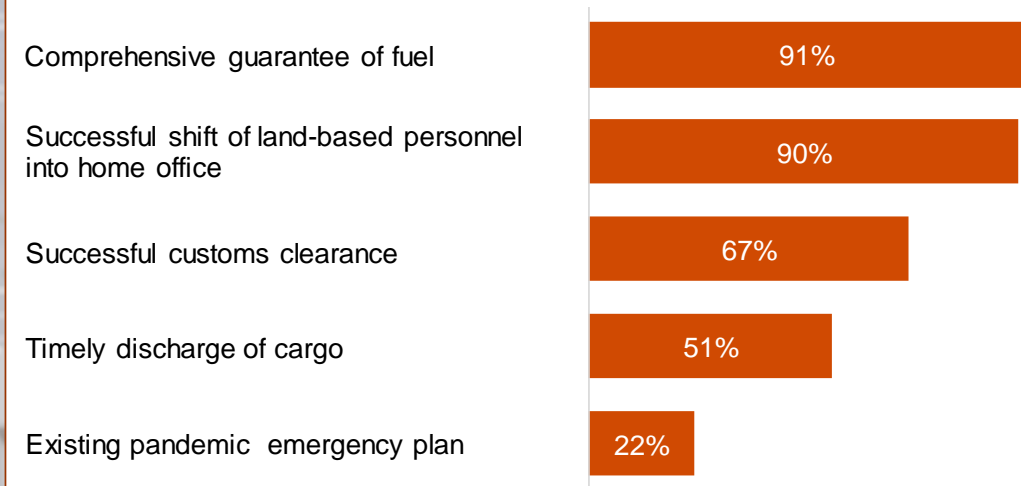
COVID-19: Impact on the German shipping industry so far

The first wave has proven to be challenging but has been overcome successfully

Covid-19 impact on crews



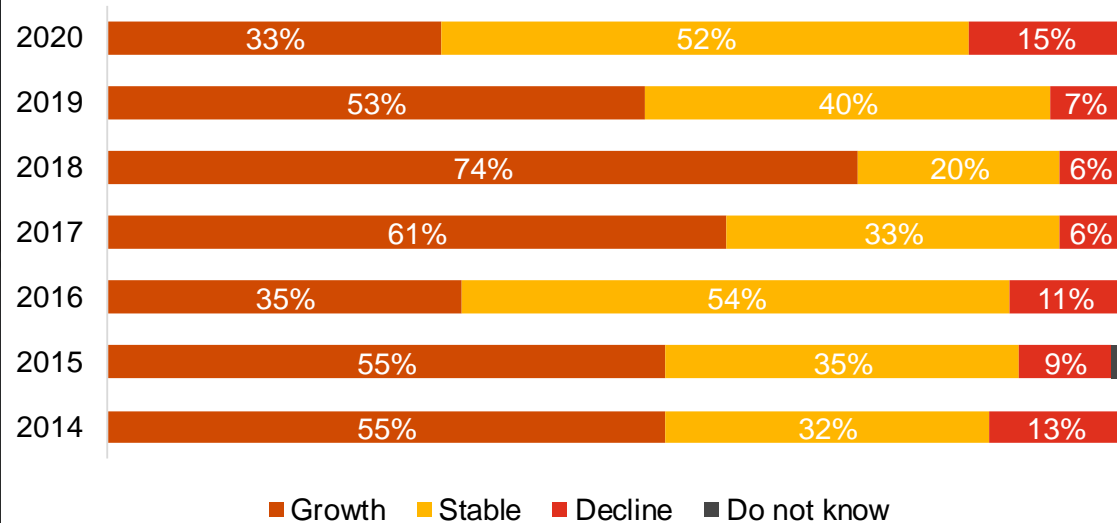
Successful management of other Covid-related challenges



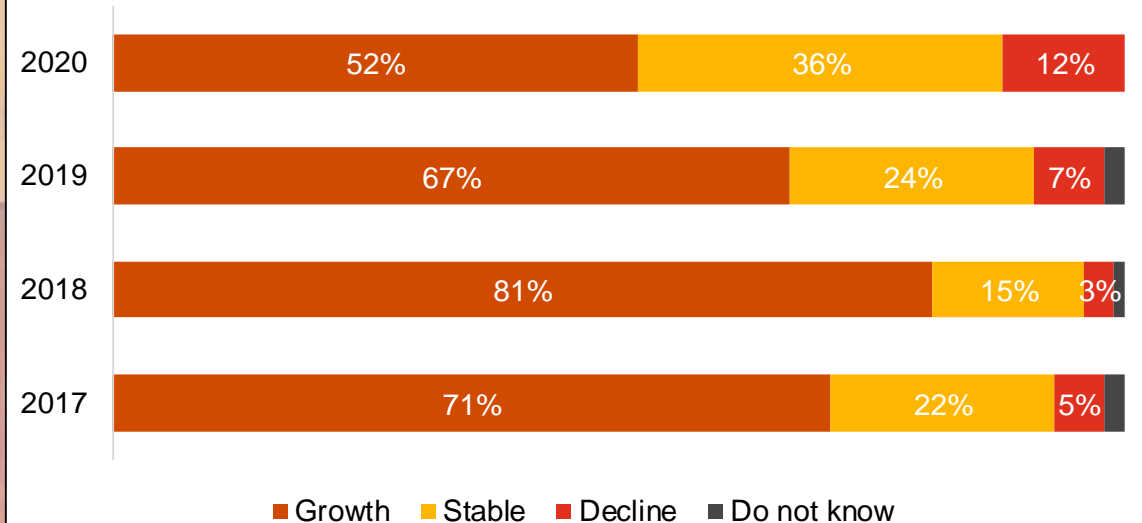
Expected market and volume development

Respondents are increasingly cautious about future prospects

Expected market development for the following 12 months



Expected global cargo volume development for the following 5 years

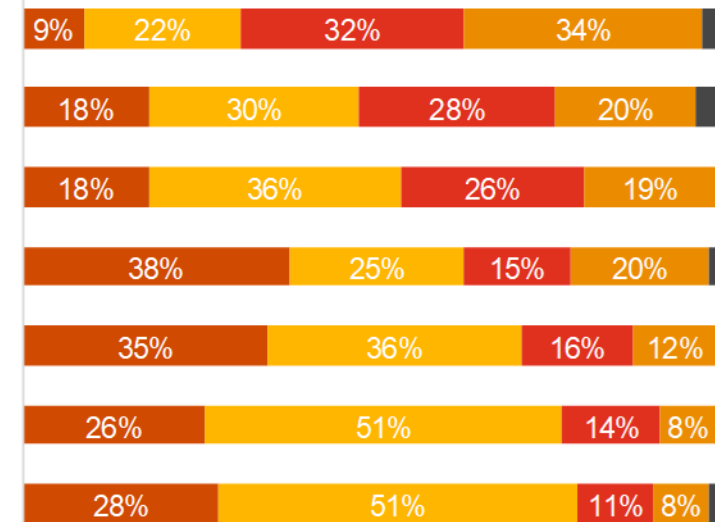


Expected market development

Respondents expect a higher focus on regional clusters going forward

Further market expectations

- Pilotless ships will become a major factor
- Smaller vessels will gain again in significance
- Cargo volumes will decrease on long-distance routes
- The current infrastructure in Germany is sufficient to handle increasing cargo volumes
- There will be a shift in travelling areas (e.g. away from USA or China)
- Regional traffic will gain strongly in significance
- Use of short-distance routes will increase again



■ Highly likely ■ Likely ■ Unlikely ■ Highly unlikely ■ Do not know

Conclusion

While the threat of the pandemic is not yet over, opportunities to develop further have emerged



“The challenges of the first wave of the pandemic have been faced well by the shipping companies and overall the supply chains have held up.”



“Even though many shipping companies were able to move their land-based business activities to the home office, the pandemic shows how great the need for further digitization in shipping is.”



“Shipowners are cautious in their assessment of the growth prospects up to 2025. The extent to which the current increase in freight and charter rates is sustainable cannot yet be conclusively assessed.”

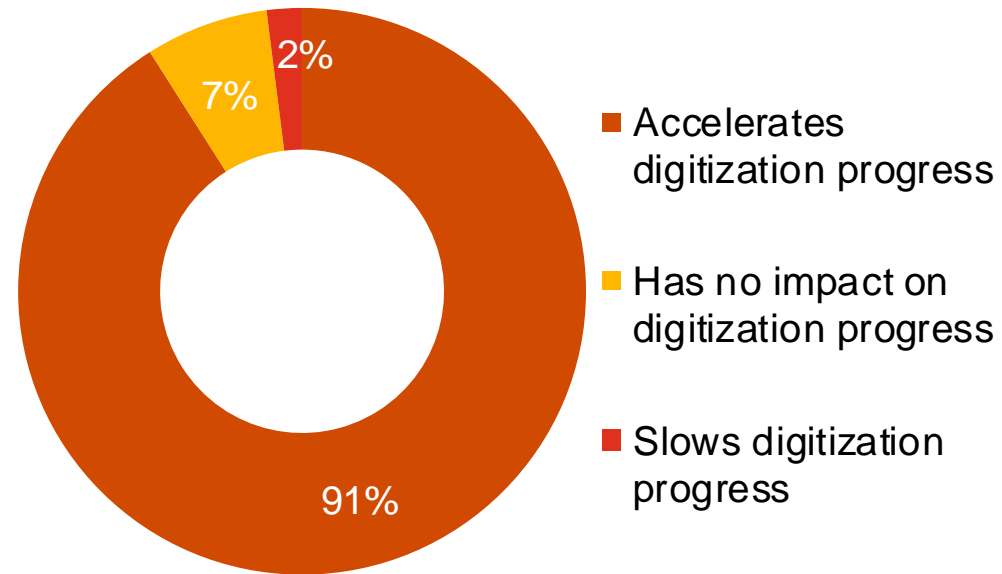


“The fundamental challenges shipping companies are facing remain. These include the financing of new ships as well as equipping existing ships with environmentally friendly technology”.

The pandemic serves as a driver for digitization

The global pandemic is expected to further accelerate the digitization

Covid-19 assessed impact on digitization processes



Digital Yard Operations Prototype



Thank you



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Thank you.

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