

Federal Maritime Commission



Measuring Performance and Targeting Improvement Carriers, Users and Marketplace Dynamics

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FMC MISSION

- To foster a fair, efficient and reliable international ocean transportation system, and to protect the public from unfair and deceptive practices.

U.S. Containerized Imports (Value) in Perspective, 2011

US Imports ^a \$2,663 billion			
Services ^a \$427 billion (16%)	Goods ^b \$2,208 billion (84%)		
Air and Land \$1,049 billion (48%)		Waterborne \$1,159 billion (52%)	
		Bulk/Tanker \$524 billion (45%)	Container \$635 billion (55%)

a. Total imports and services are reported on a balance-of-payments basis.

b. Goods imports are reported on a Census basis. Goods imports in 2011 were \$2,235 billion on a balance-of-payments basis.

U.S. Containerized Exports (Value) in Perspective, 2011

US Exports ^a \$2,103 billion			
Services ^a \$606 billion (29%)	Goods ^b \$1,480 billion (71%)		
	Air and Land \$910 billion (61%)	Waterborne \$571 billion (39%)	
		Bulk/Tanker \$322 billion (56%)	Container \$249 billion (44%)

a. Total exports and services are reported on a balance-of-payments basis.

b. Goods exports are reported on a Census basis. Goods exports in 2011 were \$1,497 billion on a balance-of-payments basis.

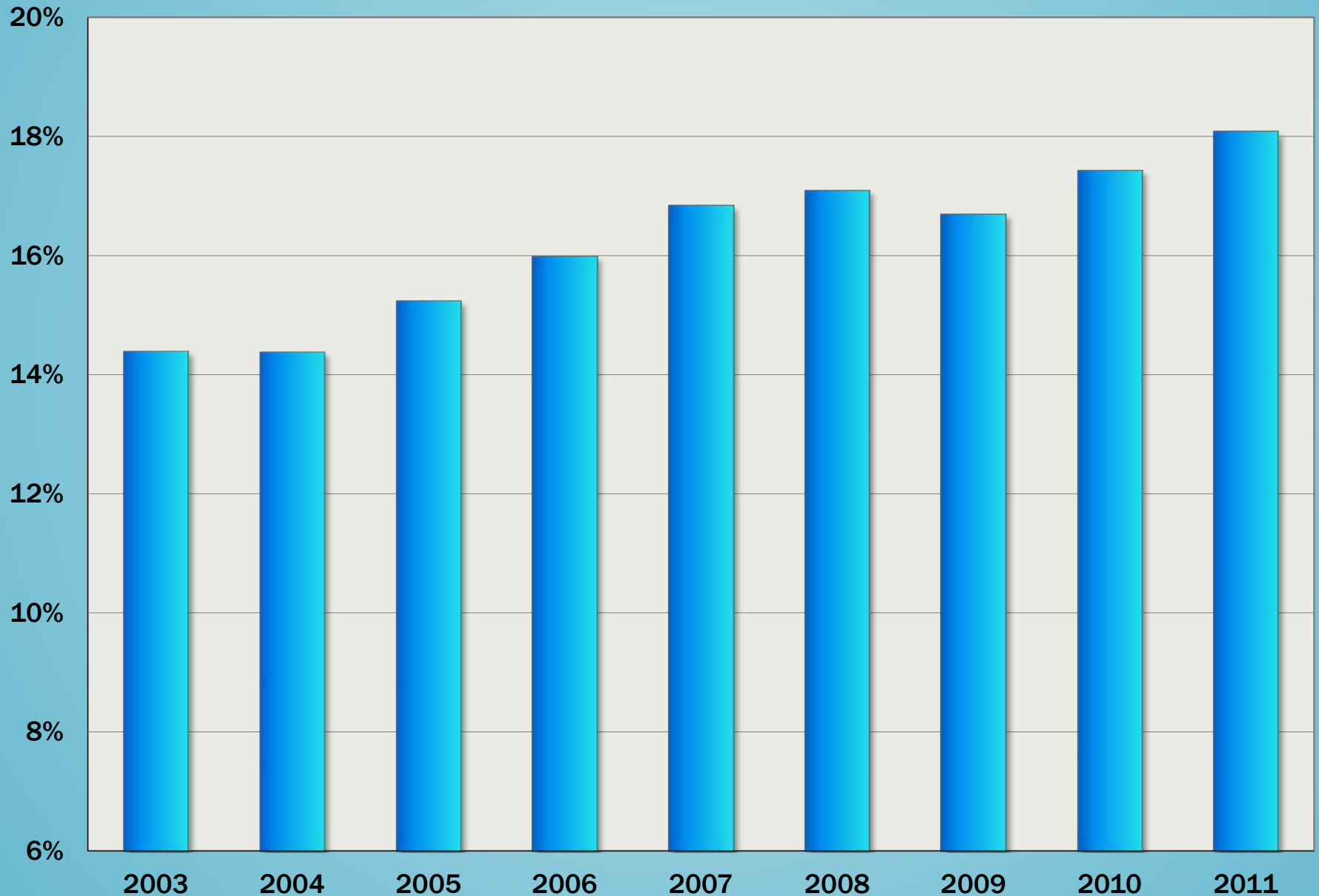
Goal & Strategy

- **Goal:** To maintain an efficient and reliable international ocean transportation system.
- **Strategy:** Take action to address substantially anticompetitive conduct.

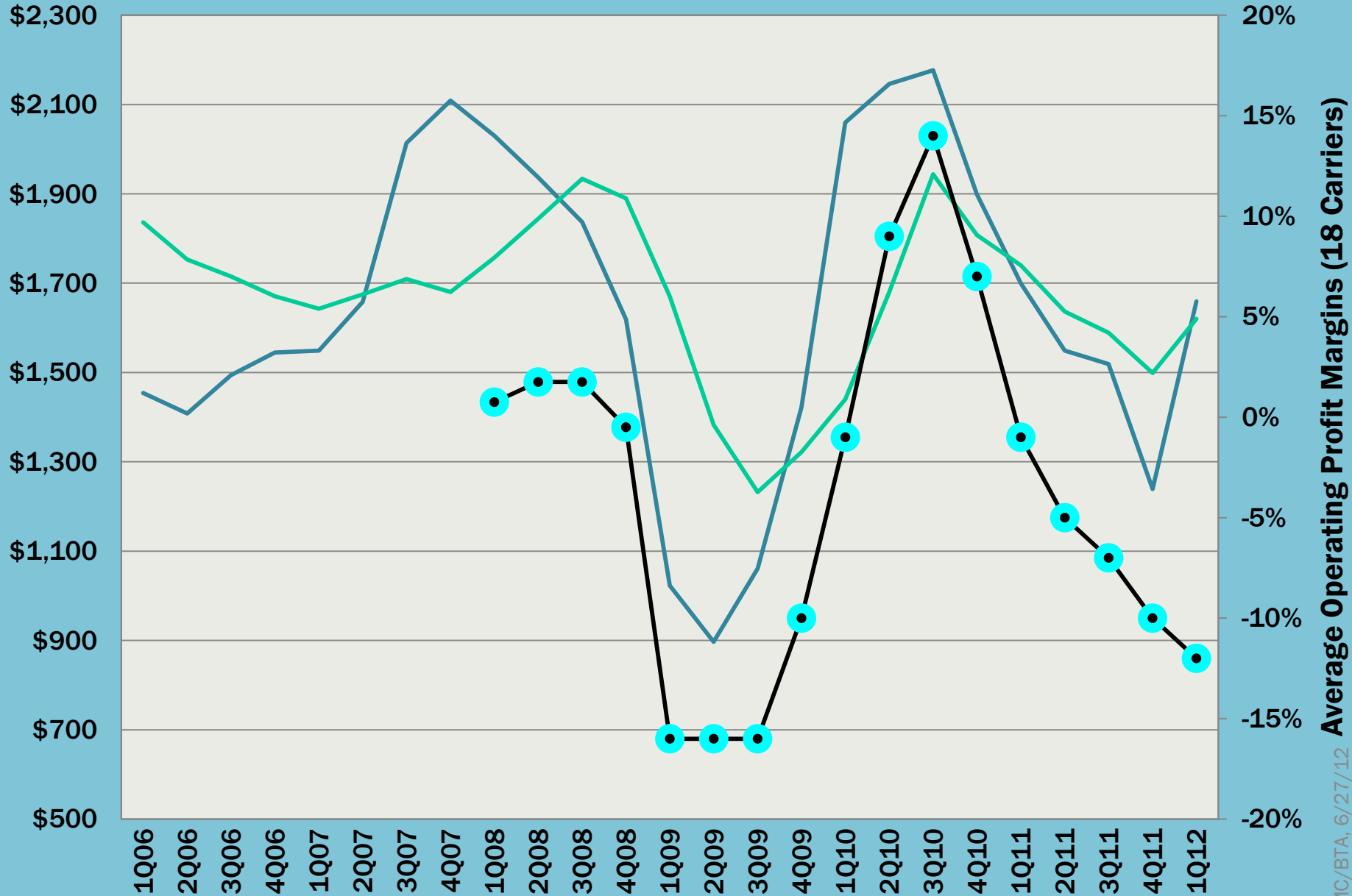
Performance Measure

- Percent share of US ocean trade moved by containership as an indicator of liner shipping efficiency.

Percent of U.S. Oceanborne Cargo Carried by Containership (by Weight)

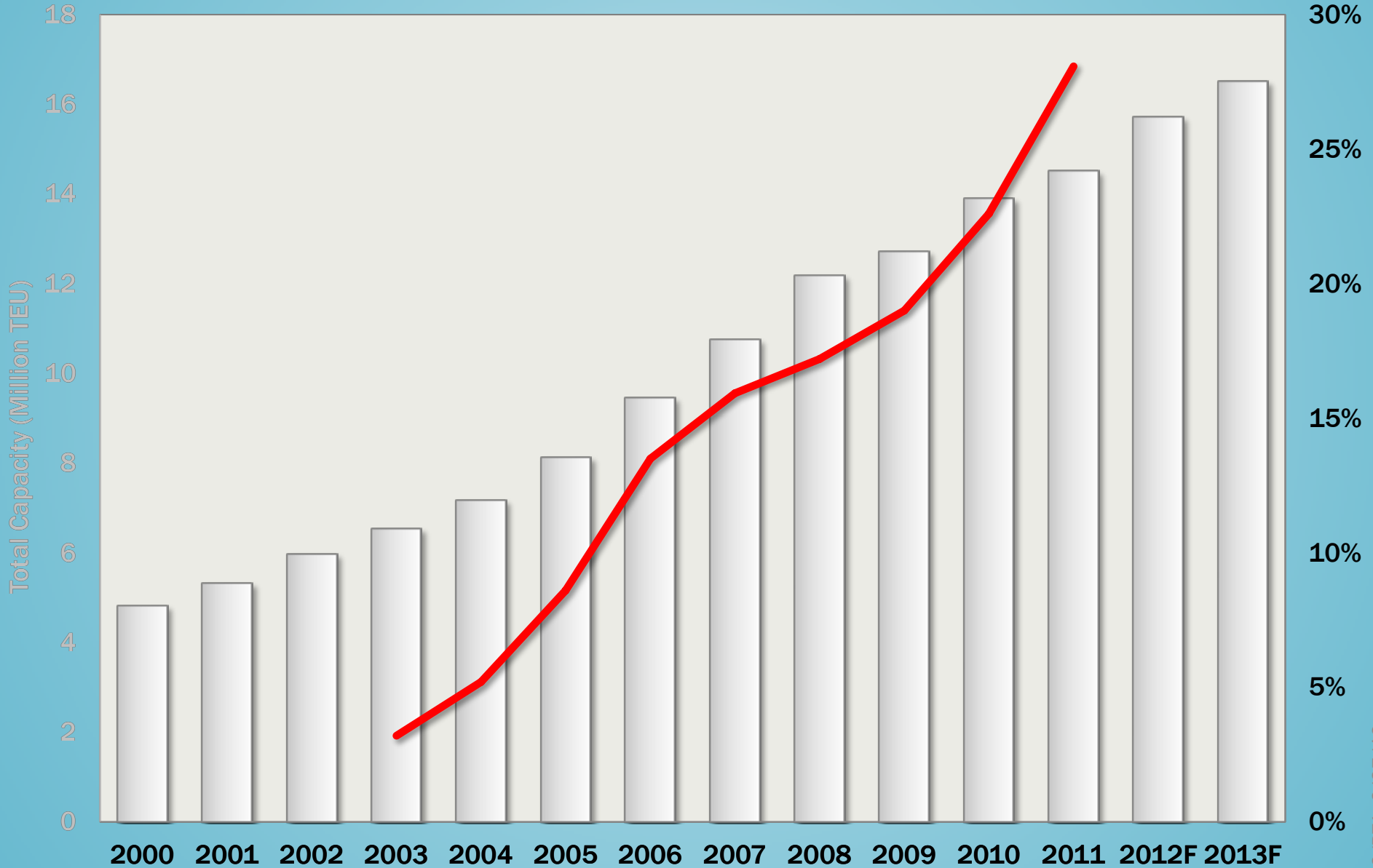


Average Operating Profit Margins (18 Carriers)



Growth in Capacity and Ship Size

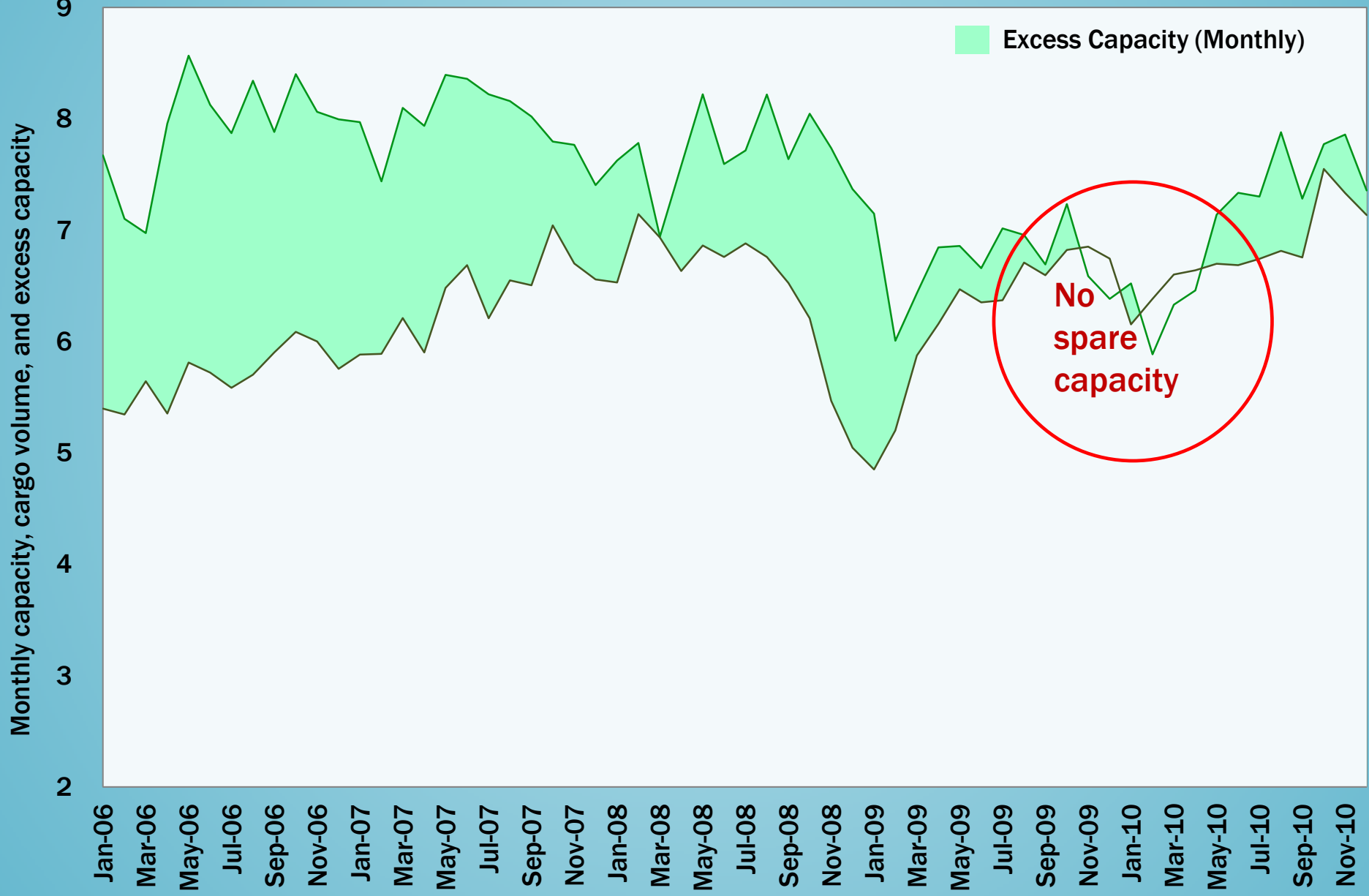
— Total Capacity Capacity
— Percent of Fleet Capacity Capacity Ships > 7,000 TEU



United States to Asia Trade Conditions – Deadweight

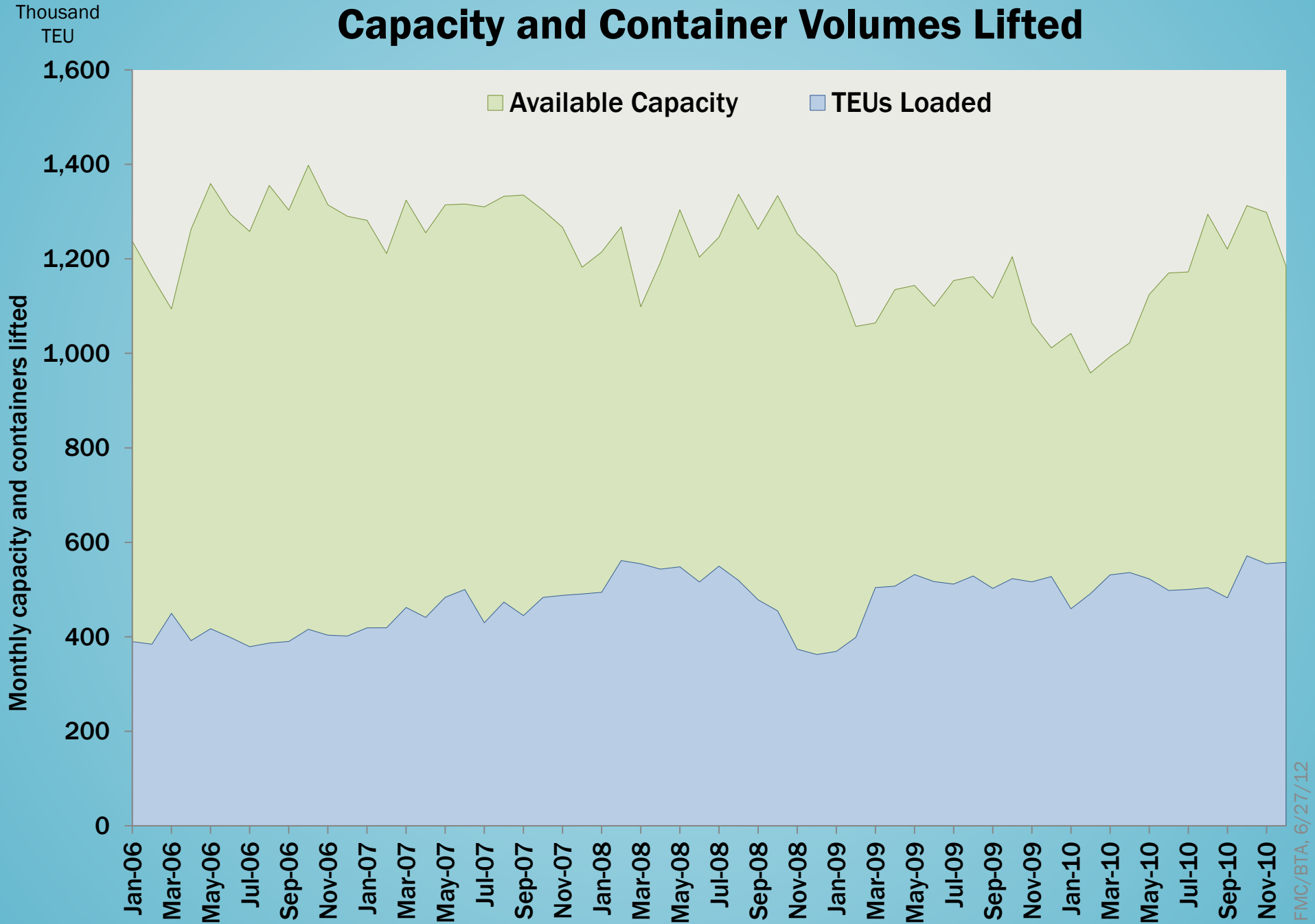
Estimated Outbound Capacity and Outbound Load (Cargo & Empties)

Million
deadweight
MTON



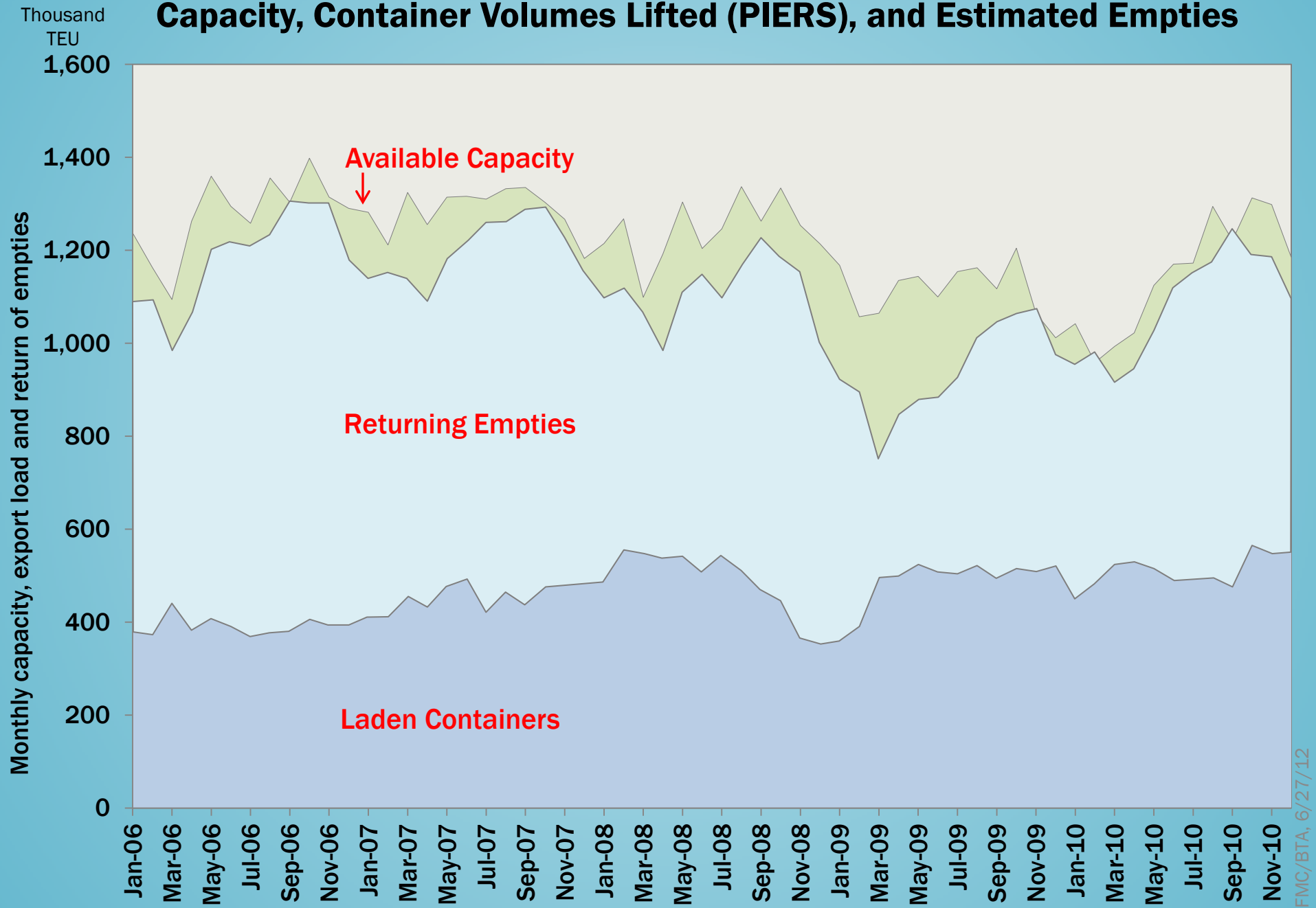
United States to Asia Trade Conditions

Capacity and Container Volumes Lifted



United States to Asia Trade Conditions - TEU

Capacity, Container Volumes Lifted (PIERS), and Estimated Empties



Slow-Steaming Trends - Transpacific Inbound

2006



22 knots

2008



21.7 knots

2010



20.4 knots

Mean Speed (knots) from last port out to first port in

Slow-Steaming Trends - Transpacific Outbound

2006



18.7 knots

2008



18 knots

2010



16.3 knots

Mean Speed (knots) from last port out to first port in

Slow-Steaming Trends - Asia to Europe

2006



20.2 knots

2008



19.9 knots

2010



18.4 knots

Mean Speed (knots) from last port out to first port in

Slow-Steaming Trends - Europe to Asia

2006



19.9 knots

2008



19.1 knots

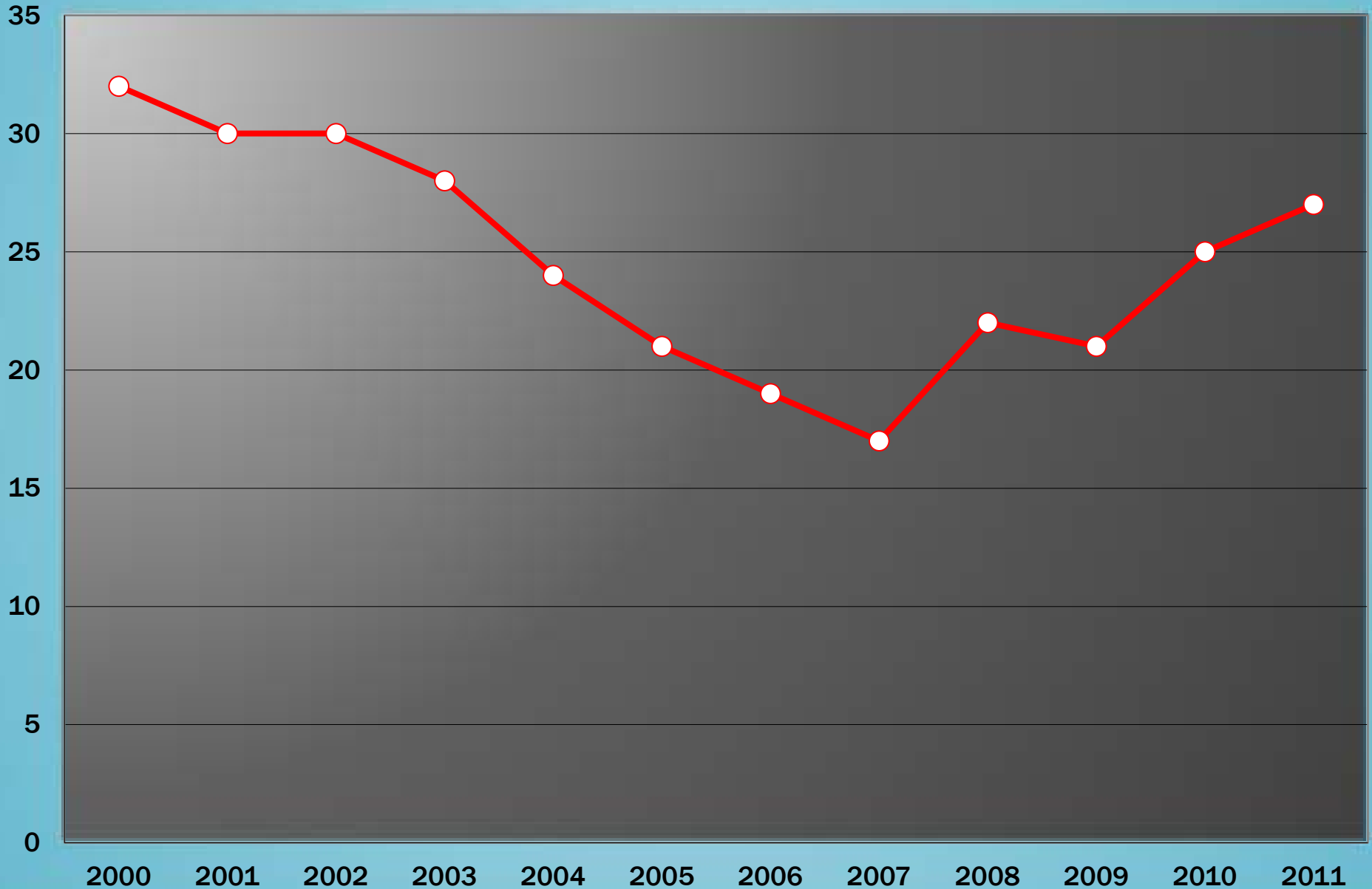
2010



16.7 knots

Mean Speed (knots) from last port out to first port in

Propensity of US Importers to Route Containers via Canada (No. of containers per 1,000 import containers bound for the U.S.)



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Thank You