

Brave new world? Four visions of the future

Vision 1: Digital reinvention

TRADE DEMAND



1-1.5x
MULTIPLIER

"SLOW AND STEADY"
TRADE GROWTH

MODEST ADDITIONAL
CONTAINERISATION

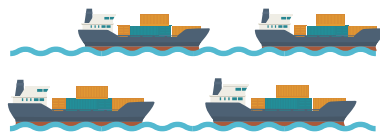


SHORTER, MORE DIVERSE SUPPLY CHAINS
(E.G., INDIA TO CHINA, AFRICA TO EUROPE)

CHINA MANAGES SLOWDOWN,
INDIA DOES NOT ACHIEVE
"BREAKOUT" GROWTH



SECTOR ECONOMICS



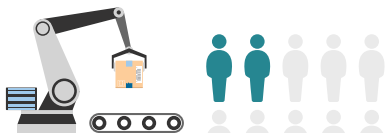
SCALE ECONOMIES LOSE SALIENCE;
FLEXIBILITY IS VALUED



SMALLER SHIPS,
MORE
POINT-TO-POINT,
LESS
TRANS-SHIPMENT



DIGITAL, DATA,
AND ANALYTICS
A FUNDAMENTAL
DRIVER OF VALUE



CONSIDERABLE AUTO-
MATION ACROSS VALUE
CHAIN (SHIPS, PORTS,
RAIL, TRUCKS)

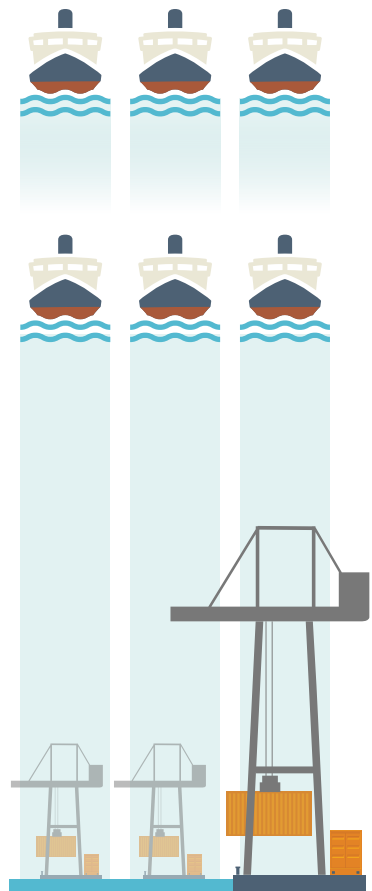


INDUSTRY STRUCTURE

4-5 MAJOR INCUMBENTS AND "LONG
TAIL" OF POINT-TO-POINT PLAYERS

VERTICAL INTEGRATION ENABLES
DIGITISATION AND PROVISION OF E2E
SUPPLY CHAIN SERVICES

FREIGHT FORWARDING RADICALLY
SHIFTED TO A DIGITAL MODEL



It's 2043 and the container transport industry's traditional incumbents are even stronger. Digital, data and analytics are the primary drivers of value creation. Players with significant asset footprints – particularly when coupled with vertical integration – lead the way, with proprietary data that allows them to out-compete any potential disruptive entrant.

Data and technologies like blockchain are used in creative ways to ensure reliability across the value chain, real-time transparency on cargo flows, and seamless integration with customs and customers' supply chain systems.

Get the full story: [Download 'Four visions of the future' from ttclub.com/tomorrow](https://ttclub.com/tomorrow)