

# Brave new world? Four visions of the future

## Vision 2: Digital disruption

### TRADE DEMAND



**1.5-2x  
MULTIPLIER**

REDUCED FRICTION VIA  
DIGITAL UNLOCKS NEW  
EXPORTERS/IMPORTERS

### MODEST ADDITIONAL CONTAINERISATION

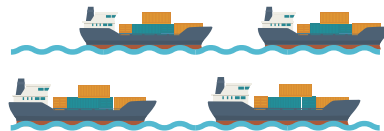


SHORTER, MORE DIVERSE SUPPLY CHAINS  
(E.G., INDIA TO CHINA, AFRICA TO EUROPE)

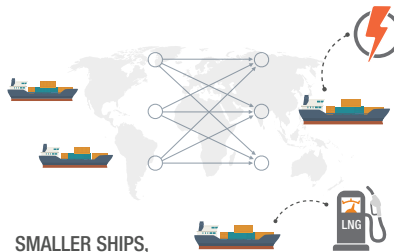
CHINA MANAGES SLOWDOWN,  
INDIA DOES NOT ACHIEVE  
"BREAKOUT" GROWTH



### SECTOR ECONOMICS



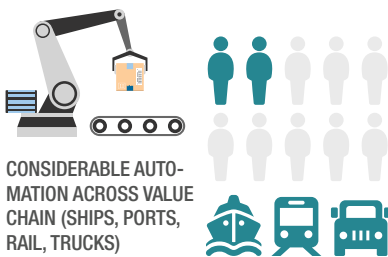
SCALE ECONOMIES LOSE SALIENCE;  
FLEXIBILITY IS VALUED



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

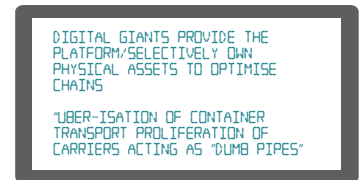


DIGITAL, DATA,  
AND ANALYTICS  
A FUNDAMENTAL  
DRIVER OF VALUE



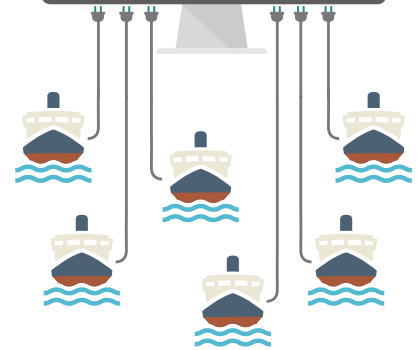
CONSIDERABLE AUTO-  
MATION ACROSS VALUE  
CHAIN (SHIPS, PORTS,  
RAIL, TRUCKS)

### INDUSTRY STRUCTURE



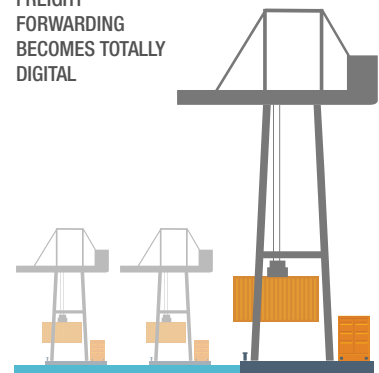
DIGITAL GIANTS PROVIDE THE  
PLATFORM/SELECTIVELY OWN  
PHYSICAL ASSETS TO OPTIMISE  
CHAINS

"UBER-ISATION OF CONTAINER  
TRANSPORT PROLIFERATION OF  
CARRIERS ACTING AS "DUMB PIPES"



LED BY "DIGITAL  
GIANTS" – ENABLES  
DIGITISATION AND  
PROVISION OF E2E  
SUPPLY CHAIN  
SERVICES

FREIGHT  
FORWARDING  
BECOMES TOTALLY  
DIGITAL



New industry entrants have become the dominant players and today's incumbents are struggling, having failed to adopt digital, data and analytics with sufficient haste and purpose. Digitally native companies are better managing the end-to-end value chain by leveraging technology, winning a large share of the profit pool from marginalised asset owners and traditional freight forwarders.

Welcome to the "Uber-isation" of container transport. Incumbent container line brands are irrelevant given that, from the customer perspective, one container ship on a given route is the same as any other.

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