

Brave new world? Four visions of the future

Vision 3: Third wave of globalisation

TRADE DEMAND



>2x
MULTIPLIER
RE-ACCELERATION OF
TRADE GROWTH

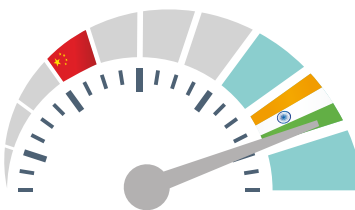
CONTAINER CAPTURES
SIGNIFICANT SHARE FROM BULK



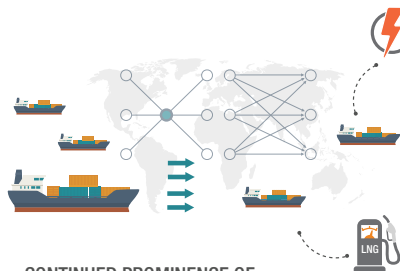
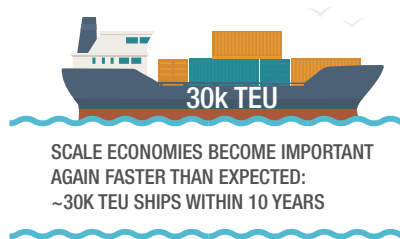
SPECIALISATION RESULTS
IN SIGNIFICANT SUPPLY
CHAIN FRAGMENTATION



CHINA MANAGES
SLOWDOWN WHILE
INDIA GROWS >10% P.A.



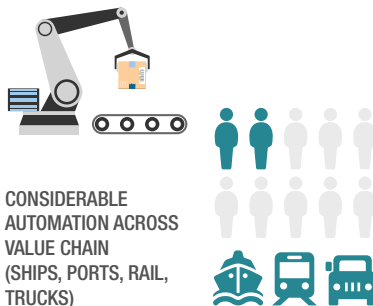
SECTOR ECONOMICS



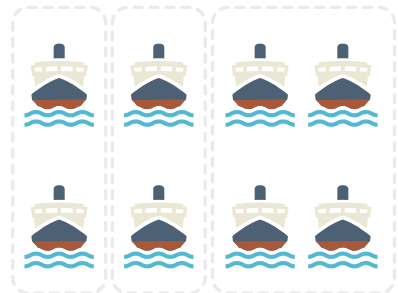
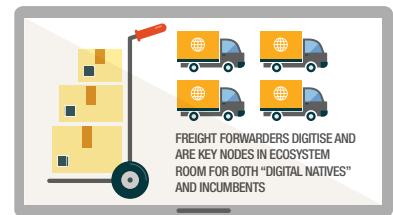
CONTINUED PROMINENCE OF
HUB-AND-SPOKE NETWORKS



DIGITAL, DATA,
AND ANALYTICS A
FUNDAMENTAL
DRIVER OF VALUE



INDUSTRY STRUCTURE



7+ INCUMBENTS AND "LONG
TAIL" OF POINT-TO-POINT
PLAYERS

ALLIANCES REMAIN
IMPORTANT AND EXPAND
SCOPE

VERTICAL INTEGRATION
PROVES TO BE OF LIMITED
VALUE



There's a return to trade growth significantly outpacing global economic growth. India achieves 10%+ growth, China's export-oriented sectors flourish and Africa enjoys a manufacturing renaissance. Containerisation has regained its upward trajectory, as the modularity, adaptability, and "through transport" characteristics of containers proves attractive even for shippers of agricultural commodities, automobiles, and other products.

Digital continues to grow in importance, but competition is still based on the availability of capacity and infrastructure at the right place and right time, as well as helping customers navigate a still-complex and fragmented industry.

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