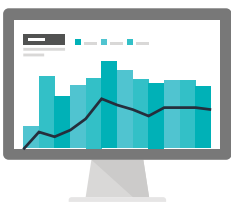


Brave new world? Four visions of the future

Vision 4: "Peak container" and consolidation

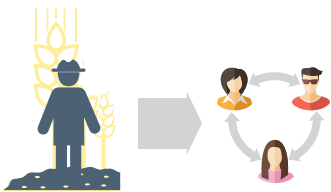
TRADE DEMAND



<1x
MULTIPLIER
FURTHER SLOWDOWN
OF TRADE GROWTH

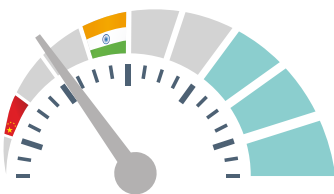
NO MORE CONTAINERISATION

MARKET STAYS FLAT AT **23%** 



INCREASING SHARE OF "LOCAL FOR LOCAL" SUPPLY CHAINS

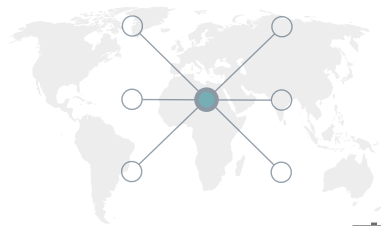
CHINA'S EXPORT ENGINE SPUTTERS AND INDIA DOES NOT ACHIEVE "BREAKOUT" GROWTH



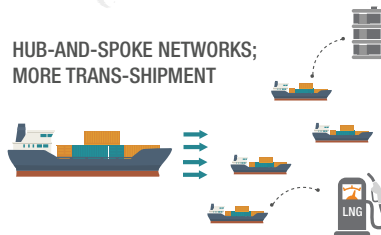
SECTOR ECONOMICS



SCALE ECONOMIES LOSE SALIENCE BECAUSE INSUFFICIENT DEMAND TO FILL SHIPS



HUB-AND-SPOKE NETWORKS; MORE TRANS-SHIPMENT

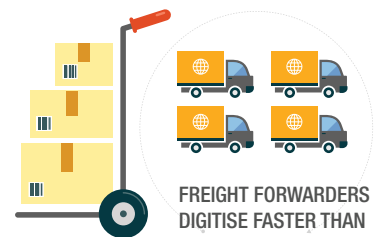


DIGITAL, DATA, AND ANALYTICS ONLY AN "OVERLAY"



GRADUAL AUTOMATION, ESPECIALLY LANDSIDE (PORTS, RAIL, TRUCKS)

INDUSTRY STRUCTURE



FREIGHT FORWARDERS DIGITISE FASTER THAN ASSET OWNERS AND AVOID DISRUPTION



ACCELERATED CONSOLIDATION RESULTING IN 3-4 LEADING LINERS
VERTICAL INTEGRATION PROVES TO BE OF LIMITED VALUE
ALLIANCES LESS VALUABLE
"DIGITAL NATIVES" PLAY IN THE MARGINS; NO ENTRY BY "DIGITAL GIANTS"



In the late 2020s, trade went into reverse. Geopolitical conflict, trade disputes, growing interest in local products, and a complete revolution in manufacturing technologies has spurred a major shift towards the re-shoring of manufacturing.

The expected digital revolution in container transport never lived up to its promise. “Peak container” – the cresting and eventual decline of containerised trade – is at hand. Consolidation is seen as the only survival strategy.

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