

# Gemini Cooperation

## Trade Highlights and Product Service Maps

January 2024 | Hamburg



# Agenda

<b>A. Gemini Cooperation Network at a Glance</b>	<b>2</b>
B. Trade Overview Far East (incl. Far East – Middle East)	7
C. Trade Overview Atlantic	20
D. Trade Overview Transpacific	30
E. Trade Overview Middle East	43
F. Overview Shuttle Network and Intra Regional Trades	51

# Hapag-Lloyd and Maersk have signed an agreement for a new long-term operational partnership called Gemini Cooperation

## Hapag-Lloyd will transition from THE Alliance and team up with Maersk in the Gemini Cooperation

- A long-term agreement has been signed with Maersk and will start in February 2025
- Partners have been informed that we will leave THE Alliance end of January 2025

### The new Gemini Cooperation will bring clear benefits for our customers

- Improved schedule reliability, competitive coverage & transit times and accelerated decarbonization
- Deliver a flexible, robust and interconnected network with industry-leading reliability

### This is an important step in continuing our strategy to become the undisputed “Number One for Quality”

- Hapag-Lloyd’s strategy will continue to focus on delivering high quality services in container shipping with a strong global network (incl. terminals & infrastructure) and being truly customer centric
- To become undisputed “Number One for Quality”, we need a step change in operational performance from our status quo – Gemini Cooperation will be an important enabler
- Our fundamental strategy is unchanged (e.g. there is no intent to move towards offering integrated logistics solutions beyond door-to-door container transport)

# Gemini Cooperation will enable us to offer significantly higher quality liner services to our customers

## Our value proposition ...



**Industry leading schedule reliability of >90%**



**Excellent network coverage with efficient connections & competitive transit times**

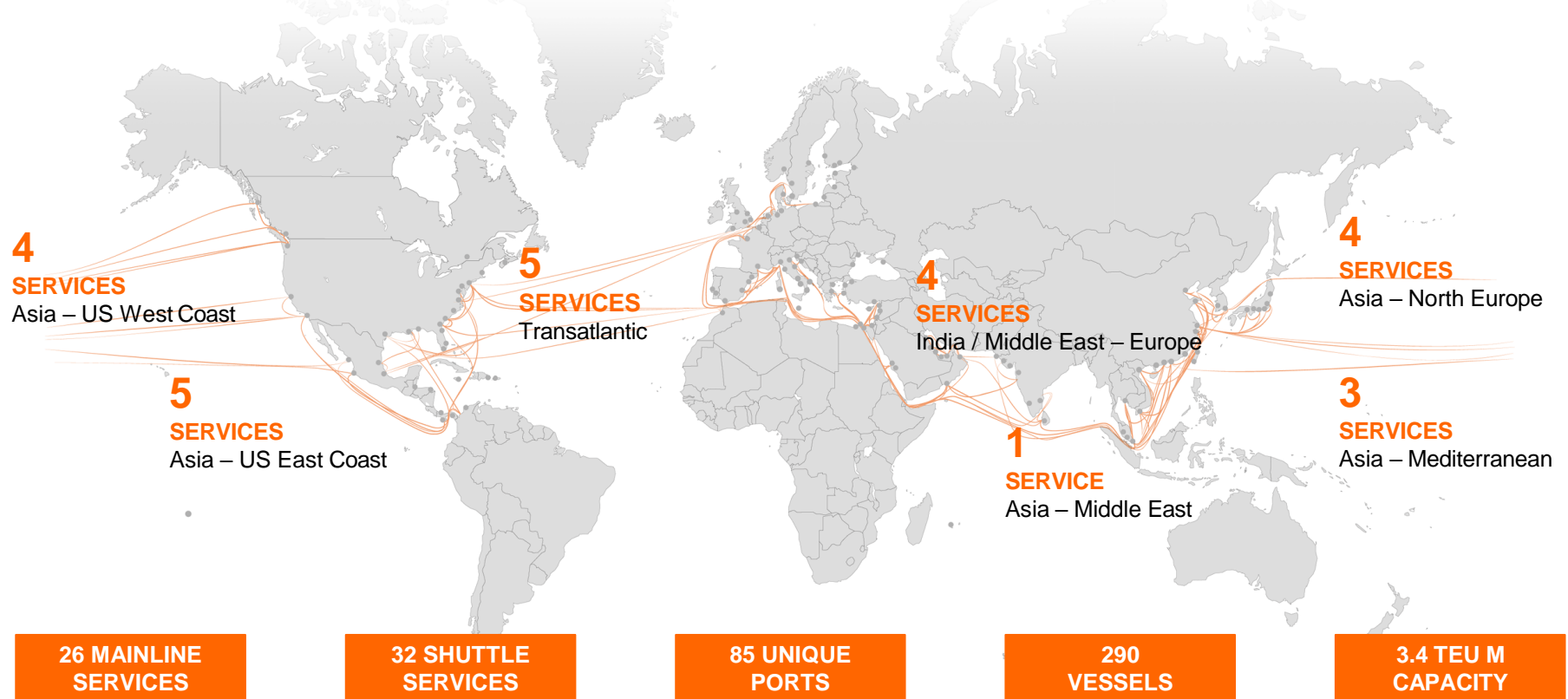


**Accelerate sustainability efforts**

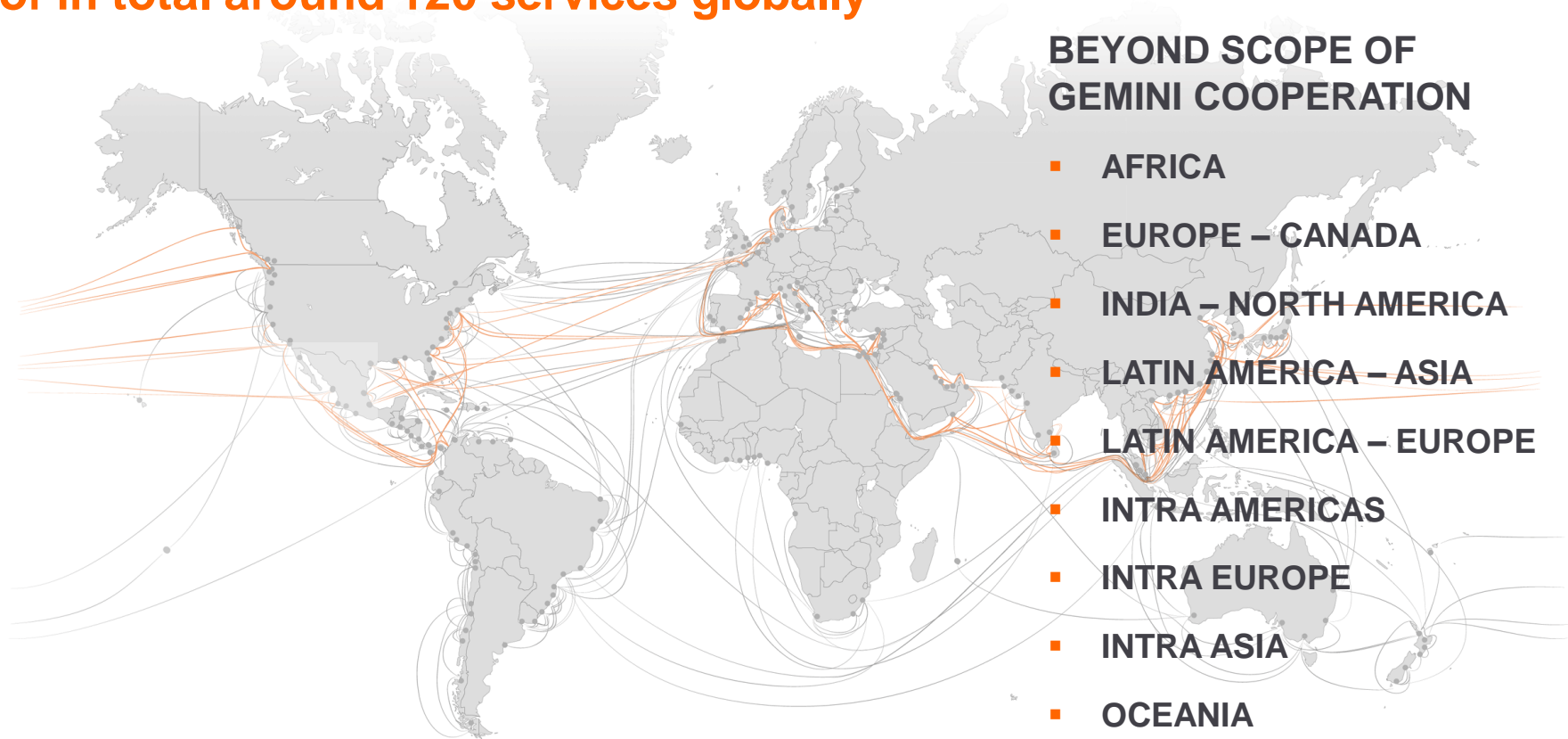
## ... your benefit

- Enable significantly higher on-time delivery of your cargo
- Make your global supply chains more resilient and be your ocean carrier partner-of-choice
- Help you decarbonize your supply chains more quickly

# The network of Gemini Cooperation will consist of 26 mainline services and 32 dedicated shuttles ...



... and will be an integral part of Hapag-Lloyd's overall network of in total around 120 services globally

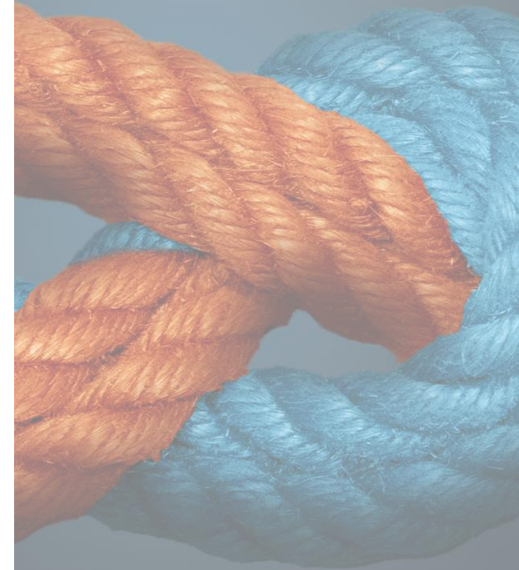


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## Highlights of the future Far East product

- **Extensive coverage** in a **highly reliable** and **resilient network** between Asia and Europe
- Benefit from a **broad coverage** of key markets through dedicated **shuttle network** in Asia and Europe offering **seamless connections**
  - **Asia** (Tanjung Pelepas and Singapore complemented by connections via Shanghai) → Japan, Korea and Bohai Sea, Thailand, Vietnam
  - **North Europe** (Wilhelmshaven / Bremerhaven and Tangier / Algeciras) → Scandinavia, Baltic, France and Belgium
  - **South Europe** (Tangier / Algeciras and Port Said / Damietta) → France, Levant, and Greece
  - **Enhanced coverage** allows seamless connections to key markets, e.g. **Asia to Africa** and **Europe to Oceania**
- **New connections**, e.g. from / to **Malaysia** and from / to **Koper** (as a gateway into Central Europe)





## Our future Far East product in numbers

### KEY FACTS

7

# Services

71

# Vessels

8

Ø Calls per service

18.6 TTEU

Ø Vessel size

28

ports covered in Europe

19

ports covered in Asia

14

shuttles  
connecting hubs  
and European gateways

13

shuttles  
connecting hubs  
and Asian  
gateways



Go to shuttle  
network

# Key features and improvements of our Far East product

## Transit times for selected port pairs (across Far East network)

*Preliminary and subject to final network design*

FROM	TO									
	Hamburg	Wilhelmshaven	Rotterdam	Felixstowe	Le Havre	Valencia	Barcelona	Istanbul	Genoa	Koper
Ningbo	31	35	35	31	32	29	29	29	29	32
Shanghai	35	32	32	34	31	29	30	29	30	29
Qingdao	34	35	33	33	34	33	30	32	34	32
Xiamen	29	31	28	28	30	28	25	27	29	28
Yantian	30	30	27	28	31	28	26	27	30	27
Tokyo	40	38	38	40	37	35	36	35	35	35
Busan	32	33	30	31	32	30	28	29	31	30
Laem Chabang	28	29	26	27	28	26	23	25	26	26
Haiphong	31	32	29	29	30	29	26	28	29	29
Vung Tau	28	28	25	26	27	25	23	24	26	25

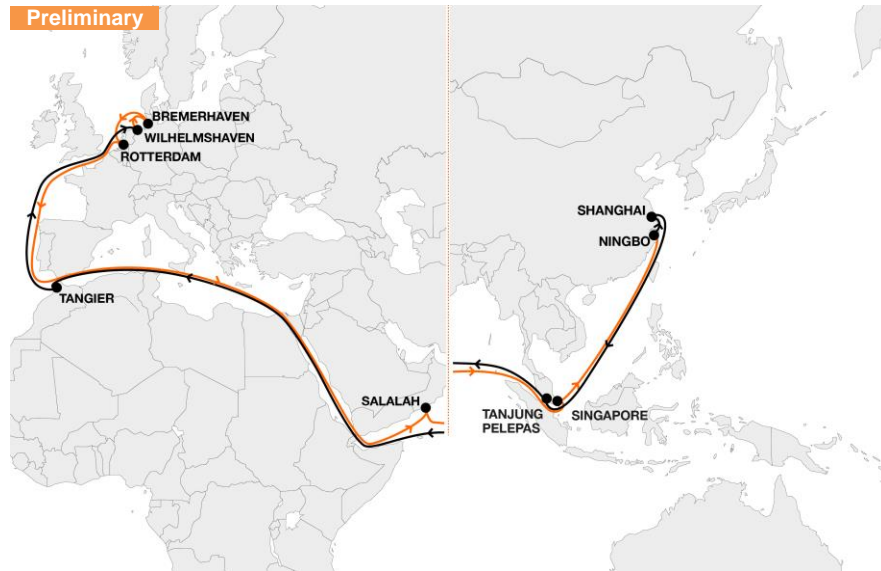
**>90%**  
Schedule  
reliability

**>95%**  
of volume gets faster  
or remains same<sup>1)</sup>

## Europe – Asia

# Service Profile NE1

Preliminary



## KEY SERVICE VALUE PROPOSITION

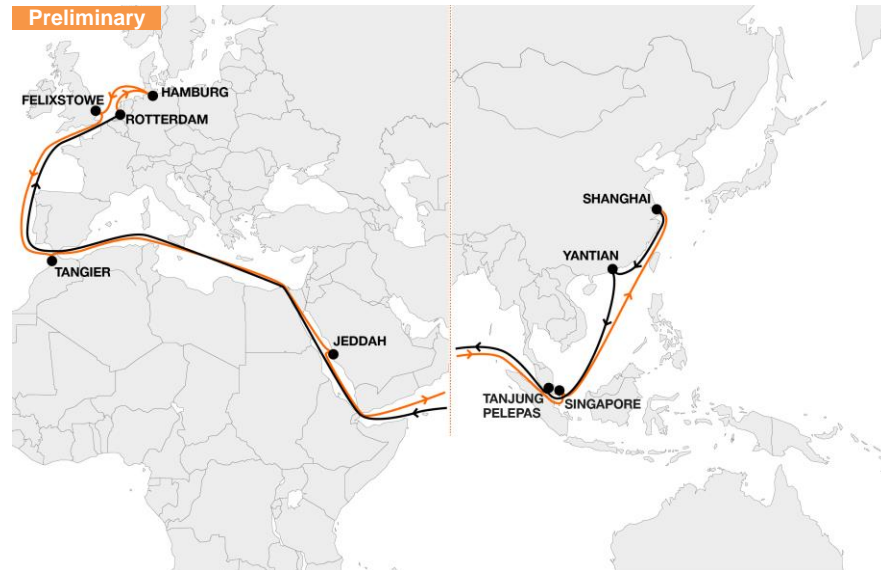
- **Core service** from **Central China** to **Germany** and **Scandinavia/Baltic** via Wilhelmshaven
- **Strong eastbound product** from Germany and Scandinavia/Baltic to **Ningbo, Shanghai** and connection to Southeast Asia and Oceania
- **New connection to Salalah** to serve the Middle Eastern markets

## IMPORTANT CONNECTIONS

- **Dedicated shuttles** between **Tangier** and **Le Havre** and **Antwerp**
- **Japanese** and **Korean cargo** from and to Germany, Scandinavia, Baltic will be connected on shuttles **via Shanghai**
- Multiple connections from **South China** and **Southeast Asia** through dedicated shuttles **via Tanjung Pelepas hub**

Europe – Asia

## Service Profile NE2



### KEY SERVICE VALUE PROPOSITION

- **Express service** from **Central and South China** to **Rotterdam** and **Hamburg**
- Fast connection to **Hamburg** as additional **strong gateway** complementing Wilhelmshaven on NE1
- **Eastbound** with **attractive connection** from **UK** to Southeast Asia, Oceania and Central China
- **Serving** the growing market from **Europe to the Middle East** with a fast connection to Jeddah

### IMPORTANT CONNECTIONS

- **Japanese** and **Korean** cargo to Rotterdam and Hamburg will be connected on shuttles **via Shanghai**
- **Multiple connections** (mainline and/or shuttles) to Ningbo and Southeast Asia **through hubs** in **Tanjung Pelepas (WB)** and **Singapore (EB)**

Europe – Asia

## Service Profile NE3

Preliminary



### KEY SERVICE VALUE PROPOSITION

- **Core service** with streamlined rotation from **Central China** to **UK** and **Rotterdam** and vice versa
- **Dedicated eastbound service** from **Rotterdam** to Southeast Asia, Oceania and Central China

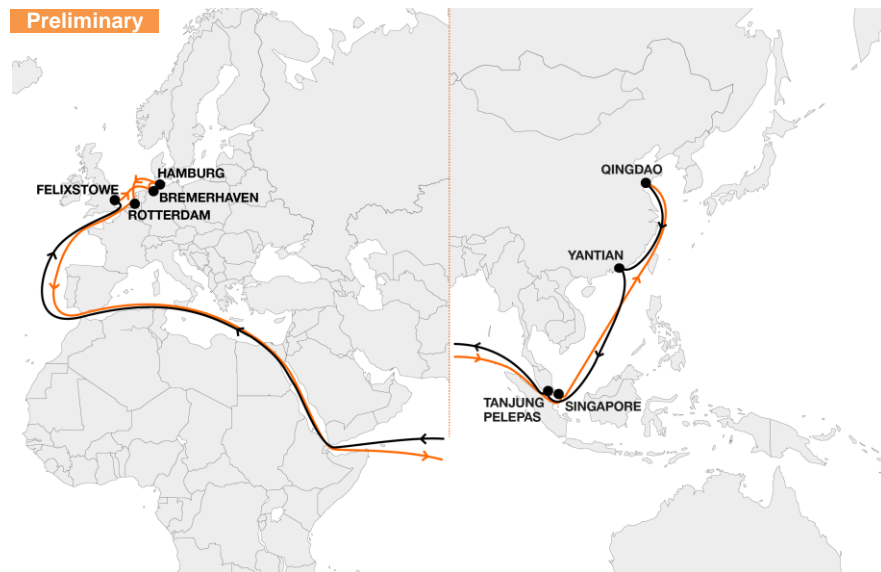
### IMPORTANT CONNECTIONS

- **Japanese** and **Korean** cargo to **UK** will be connected through dedicated shuttles **via Shanghai**
- Multiple westbound connections from **South China** and **Southeast Asia** through dedicated shuttles **via Tanjung Pelepas hub**
- Frequent shuttles to **Antwerp** via **Algeciras**
- **Connectivity across Trades** through **Algeciras** hub e.g. Africa, Latin America, Middle East

## Europe – Asia

# Service Profile NE4

Preliminary



## KEY SERVICE VALUE PROPOSITION

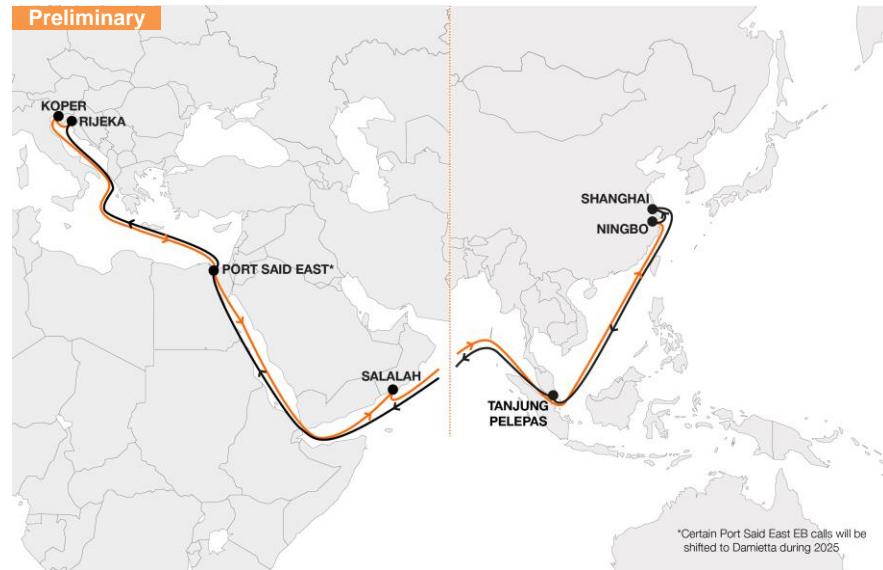
- **Core service** from **Qingdao** and **Yantian** to **UK** and **Hamburg**
- Second **fast gateway** option for **Hamburg** and **UK** next to NE2
- **Strong eastbound** product **from Germany** and **Rotterdam** to Southeast Asia and Qingdao

## IMPORTANT CONNECTIONS

- Multiple westbound connections from **Shanghai**, **Ningbo** and **Southeast Asia** through dedicated shuttles **via Tanjung Pelepas hub**
- Fastest connection from **Germany** and **Rotterdam** to **Oceania** via **hub in Singapore**
- **Scandinavia** and **Baltic** via hub in **Bremerhaven**

## Europe – Asia

# Service Profile SE1



## KEY SERVICE VALUE PROPOSITION

- **New product** from **Central China** to **Adriatic** via Koper and Rijeka as gateways to **Central European markets**
- **New connection** to **Salalah** to serve the Middle Eastern markets

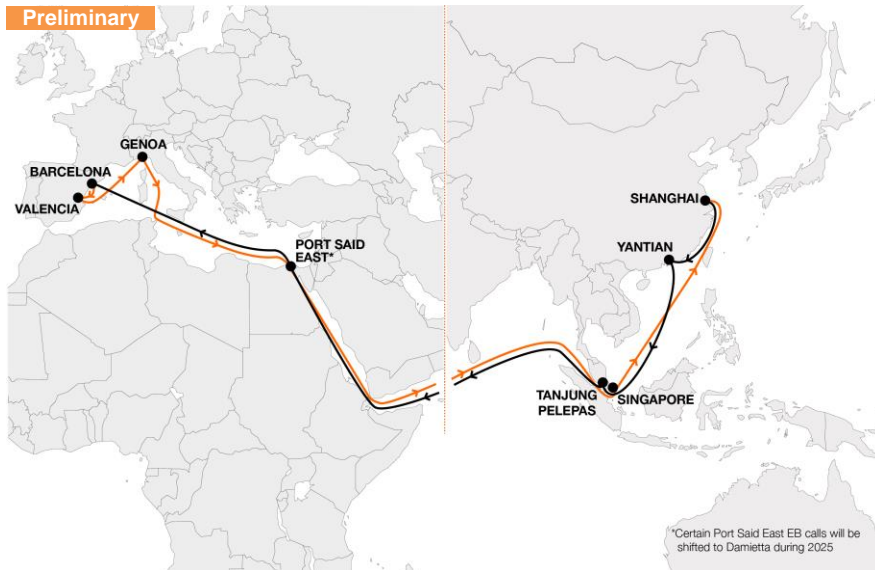
## IMPORTANT CONNECTIONS

- **Japanese and Korean cargo** will be connected on shuttles via **Shanghai**
- Multiple westbound connections from **South China** and **Southeast Asia** through dedicated shuttles via **Tanjung Pelepas hub**
- **East Med hub** enabling fast and efficient transit from and to **Türkiye, Levant, Greece** and **Black Sea** markets

## Europe – Asia

# Service Profile SE2

Preliminary



## KEY SERVICE VALUE PROPOSITION

- **Core service** from **Central and South China** to **Spain and Italy**
- **Eastbound service** dedicated to export markets from **Spain and Italy** to **Southeast Asia** and **Shanghai**, Oceania via Singapore hub

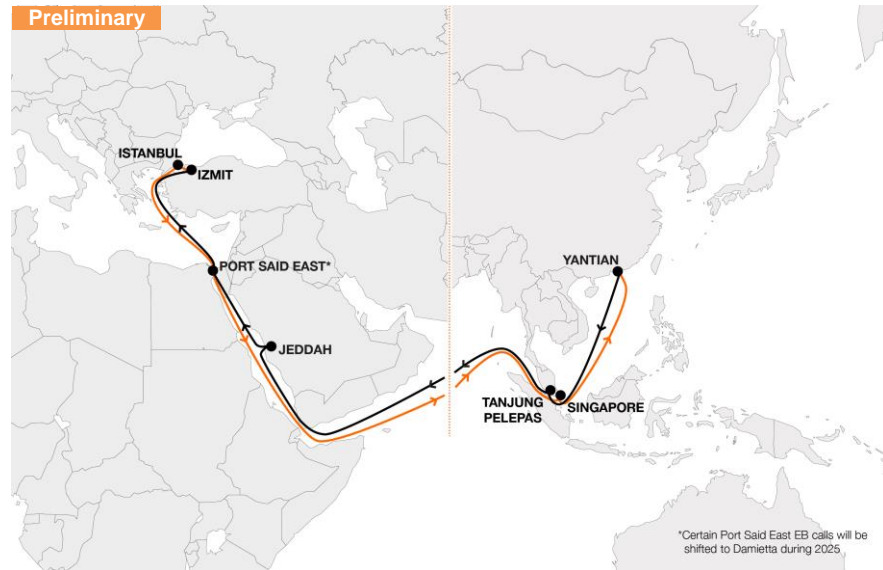
## IMPORTANT CONNECTIONS

- **Japanese and Korean** cargo to Spain and Italy will be connected through dedicated shuttles **via Shanghai**
- Connection to **Fos-sur-Mer** via dedicated shuttle from **Barcelona**
- Multiple westbound connections e.g. **Ningbo** and **Southeast Asia** through dedicated shuttles **via Tanjung Pelepas** hub



Europe – Asia

## Service Profile SE3



### KEY SERVICE VALUE PROPOSITION

- **Prime product** dedicated to connect **Asia** with the growing markets of the **Middle East** and **Türkiye**

### IMPORTANT CONNECTIONS

- **Korean cargo to Türkiye** will be connected through a dedicated shuttle **via Tanjung Pelepas hub**
- Connection to **Oceania** **via Singapore**
- Multiple connections from **Shanghai, Ningbo, Southeast Asia** through dedicated shuttles **via Tanjung Pelepas hub**
- **East Med hub** shuttles enabling fast and efficient transit from and to **Türkiye, Egypt, Levant and Greece** (Black Sea markets covered via additional feeders)

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## Asia – Middle East

# Service Profile AGX

Preliminary



## KEY SERVICE VALUE PROPOSITION

- Dedicated **East Asia to Arabian Gulf** product for the **consumer** and key **petrochemical** markets
- Prime connections from **Mundra** to **Shanghai and Busan**

## IMPORTANT CONNECTIONS

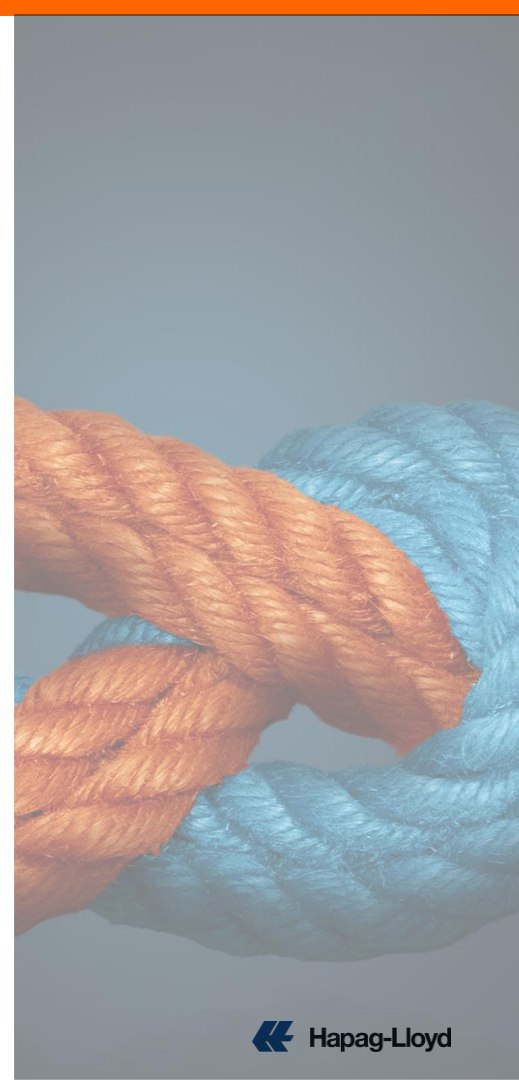
- Dedicated shuttle network between **Jebel Ali** and the **Arabian Gulf**
- **Mundra** intermodal offering to and from various **Inland Container Depots (ICDs)**
- **Tanjung Pelepas and Singapore hubs** to connect **Southeast Asia, South China, Japan and Korea** with dedicated shuttles
- Connection from **Asia** to **Africa** network **via Colombo**

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## Highlights of the future Atlantic product

- **Highly reliable and resilient Atlantic network** with competitive transit times
- Strong product with **excellent coverage** connecting **North and South Europe** with the **USA and Mexico**
- **Prime product** out of **North Europe** to the full **US East and Gulf Coast**
- **Continued dedicated Mexico services** out of North and South Europe
- **Strong connectivity** from the **West Mediterranean** via our hub in Tangier to the **US East Coast**
- **Dedicated US Flag services** calling the US East and Gulf Coast
- Efficient **US West Coast** coverage **via Cartagena**
- **Continued Atlantic Canada and East Mediterranean** coverage through **Hapag-Lloyd services** outside of the Gemini Cooperation scope



## Our future Atlantic product in numbers

### KEY FACTS

**5 + 1\***

# Services

**30**

# Vessels

**7**

Ø Calls per service

**6.5 TTEU**

Ø Vessel size

**10**

ports covered in the  
USA and Mexico

(Canada will continue to be served  
via our Hapag-Lloyd standalone  
network, the US West Coast via  
Cartagena)



Go to shuttle  
network

**25**

ports covered in Europe

**14**

shuttles  
connecting hubs and  
European gateways

# Key features and improvements of our future Atlantic product

## Transit times for selected port pairs (across Atlantic network)

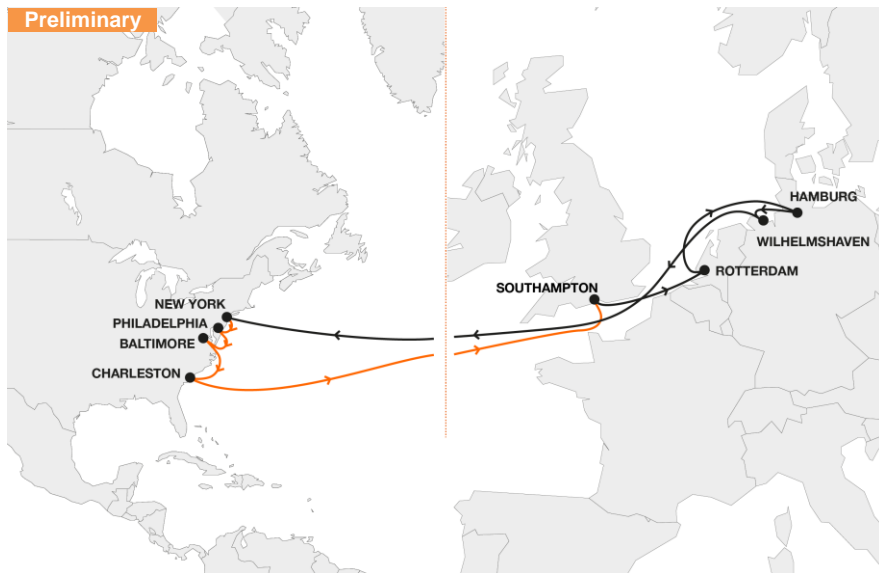
*Preliminary and subject to final network design*

FROM	TO									
	New York	Norfolk	Philadelphia	Baltimore	Savannah	Charleston	Mobile	Houston	Veracruz	Altamira
Hamburg	13	15	16	19	14	12	20	17 <sup>2)</sup>	13	16
Antwerp	18	15	22	22	18	16	25	21	18	21
Rotterdam	16	14	19	27	11	9	23	19	16	19
Southampton	14	20	22	20	17	15	27	21	20	22
Le Havre	16	17	24	23	17	15	27	23	20	23
Genoa	13	16	26	19	24	22	33	24	21	20
Livorno	16	19	26	22	28	26	27	27	22	24
Valencia	12	16	22	19	24	22	23	22	16	19
Barcelona	13	16	24	19	31	29	25	24	18	21
Fos-sur-Mer	15	19	26	22	27	25	27	27	22	24

**>90%**  
Schedule  
reliability

**>80%**  
of volume gets faster  
or remains same<sup>1)</sup>

## North Europe – North America Service Profile AL1



### KEY SERVICE VALUE PROPOSITION

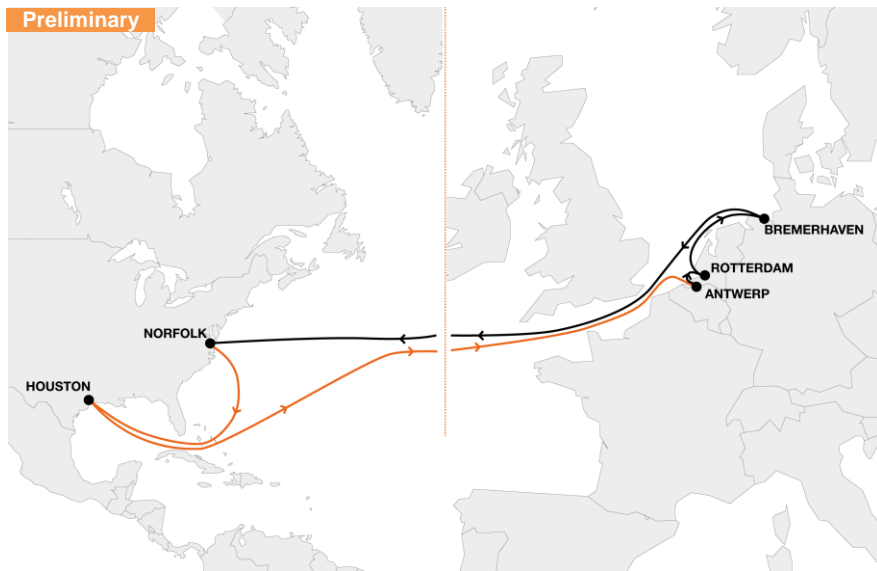
- **Extended coverage** of the **US East Coast**
- **Prime product** from **Germany and Central Europe** with 2 gateway options (Hamburg and Wilhelmshaven) to **New York**
- Coverage of **Philadelphia** and **Baltimore**
- **Excellent eastbound** connection from **Charleston**

### IMPORTANT CONNECTIONS

- **Le Havre** connected by **dedicated shuttle** via Rotterdam with excellent connectivity westbound and eastbound
- **Poland, Sweden and Denmark** connected by **shuttles** via **Wilhelmshaven**
- **Other Scandinavian** markets covered via comprehensive network of **feeders**
- Comprehensive **intermodal connections** into **US Midwest**



## North Europe – North America Service Profile AL2



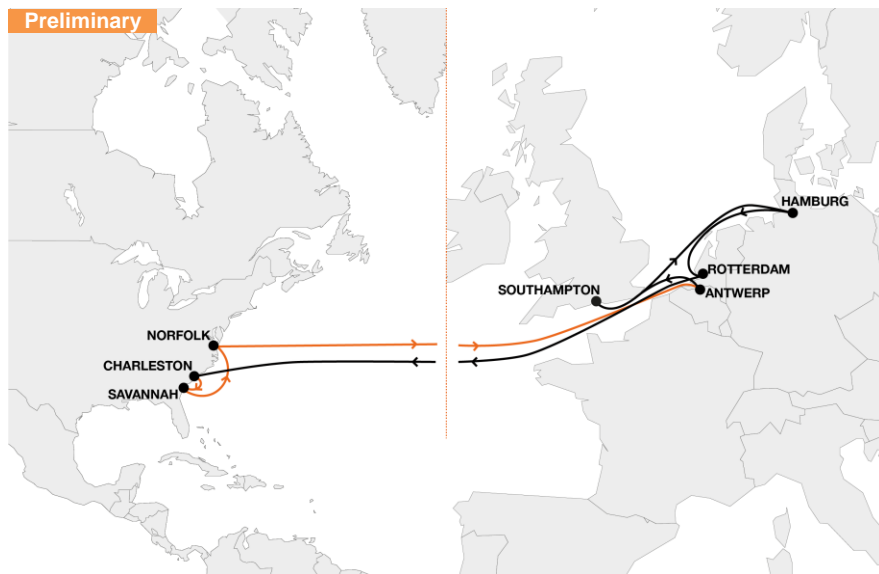
### KEY SERVICE VALUE PROPOSITION

- **US Flag** service
- **Core service** from **Benelux** and **Germany** non-stop to **Norfolk** as well as **Houston** as second port westbound

### IMPORTANT CONNECTIONS

- **Le Havre** connected by dedicated shuttle **via Rotterdam**
- **Poland, Sweden and Denmark** connected by shuttles **via Bremerhaven**
- **Further Scandinavian** markets covered via comprehensive network of feeders
- **UK** connected **via Rotterdam**

## North Europe – North America Service Profile AL3



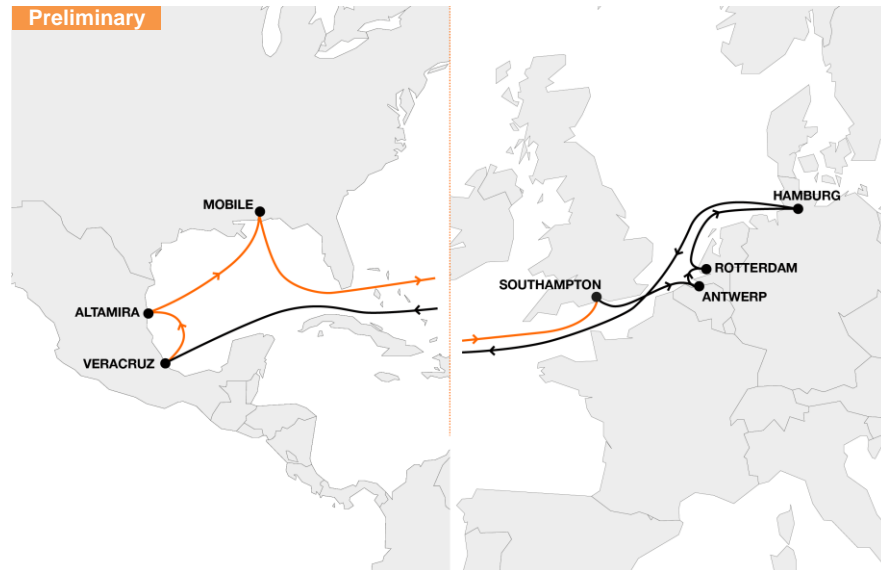
### KEY SERVICE VALUE PROPOSITION

- **US Flag** service
- **Concentrated** coverage of the **South Atlantic** market
- Excellent connection from **UK, Benelux** and **German** markets to **Charleston**
- **Comprehensive coverage** of the **Benelux and German hinterland** market eastbound and westbound with calls in both Antwerp and Rotterdam

### IMPORTANT CONNECTIONS

- **Le Havre** connected by dedicated shuttle **via Rotterdam**
- **All Scandinavian markets** connected **via Hamburg** by a comprehensive network of **feeders**

## North Europe – North America Service Profile AL4



### KEY SERVICE VALUE PROPOSITION

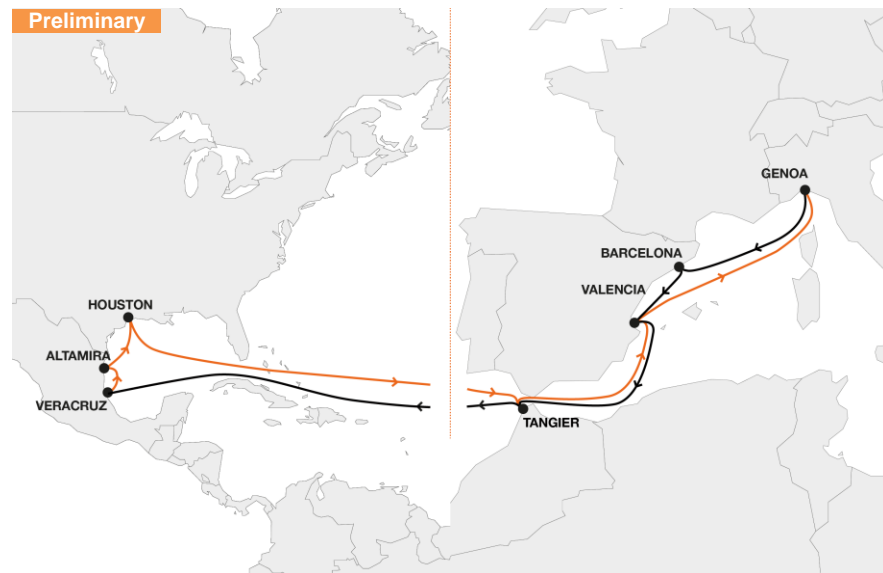
- **Core Mexico service** without stopover in the US, i.e. no U.S. AMS required
- **Leading service** from **Benelux** and **Germany** to **Mexico** and **Mobile**
- **Excellent eastbound product** from Mexico to UK and Benelux markets
- **Coverage of Mobile** with leading eastbound transit times to UK and Benelux

### IMPORTANT CONNECTIONS

- **Le Havre** connected by dedicated shuttle **via Rotterdam**
- **All Scandinavian markets** connected **via Hamburg** by a comprehensive network of **feeders**

## Mediterranean – North America

# Service Profile MGX



## KEY SERVICE VALUE PROPOSITION

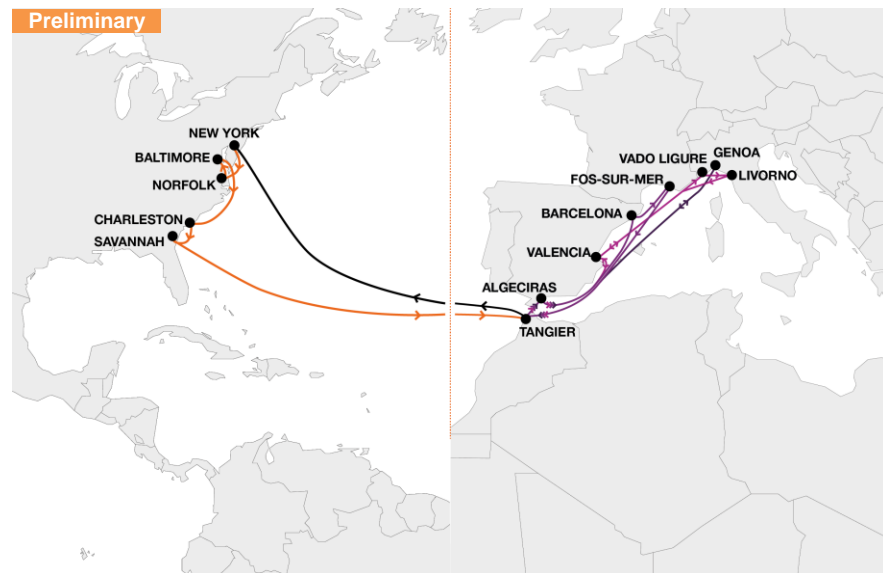
- **Core West Mediterranean to Mexico service** without stopover in the US
- **Comprehensive coverage** of the **Spanish market**
- **Eastbound and westbound calls in Valencia** providing excellent connections in both directions
- **Connecting Genoa** with **Mexico** and **US Gulf**

## IMPORTANT CONNECTIONS

- **Livorno and Fos-sur-Mer** connected by reliable shuttle **via dedicated hub in Tangier**
- Complete range of **other Italian ports** and Mediterranean markets by shuttle/feeder systems **via Tangier**
- **Excellent eastbound connection** from Houston to all other Mediterranean and African markets in connection **via Tangier**

## Mediterranean – North America

# West Med Shuttles + US4



## KEY SERVICE VALUE PROPOSITION

- **Extensive coverage** of all **West Mediterranean** ports to the US East Coast
- **Connectivity** through **shuttle network** to US4 service via **hub in Tangier**
- **New York as first westbound** call for fastest transit time
- **Addition** of **Baltimore** and **Charleston** coverage on the US East Coast

## IMPORTANT CONNECTIONS

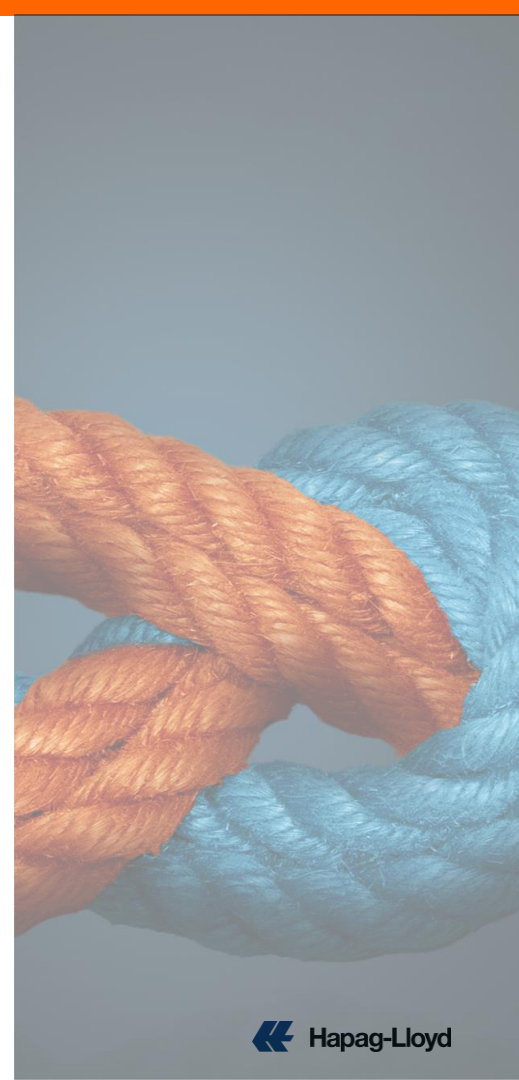
- **Miami and Jacksonville** covered through reliable connection via **Tangier and Cartagena**

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## Highlights of the future Transpacific product

- **Comprehensive** Transpacific **product** with **second to none** reliability
- Delivery of **robust service schedules** with **on-time, weekly frequency** to our customers
- The new network will provide **connections** between **all key Asia and North America ports** and **gateways with further inland connections** to all key rail ramps and doors
- **Extensive coverage** of **Southeast Asia** and **Japan** with our shuttle network via various hubs



## Our future Transpacific product in numbers

### KEY FACTS

9

# Services

93

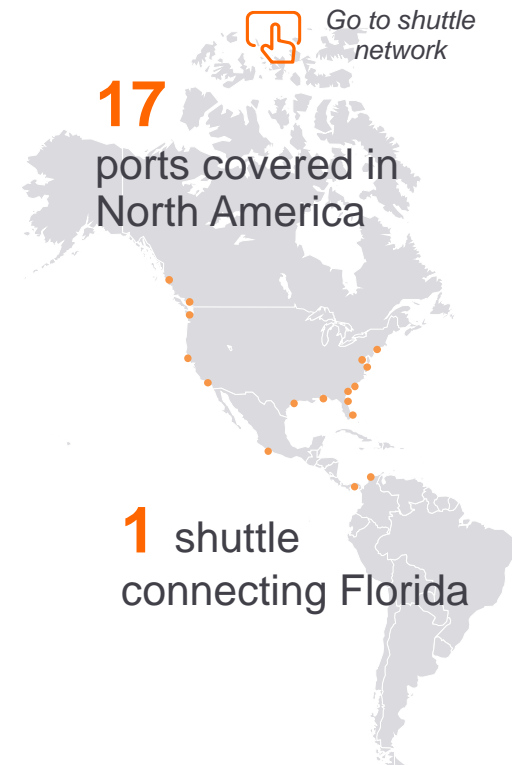
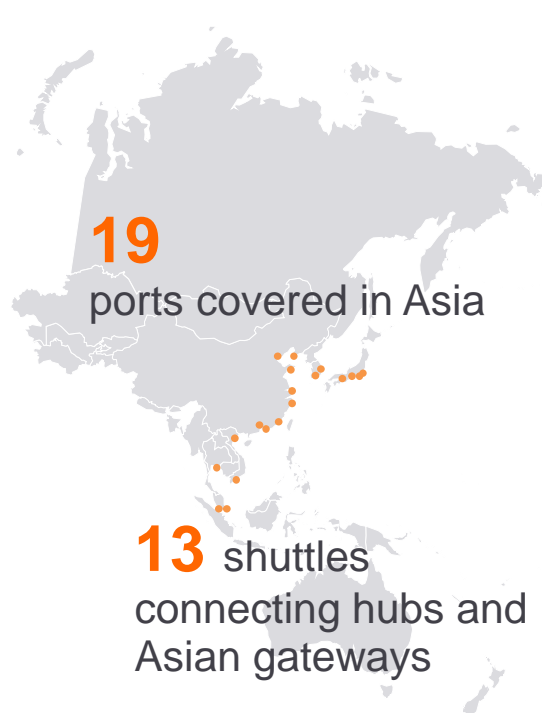
# Vessels

8

Ø Calls per service

11.8 TTEU

Ø Vessel size





# Key features and improvements of our future Transpacific product

## Transit times for selected port pairs (across Transpacific network)

*Preliminary and subject to final network design*

FROM	TO									
	Los Angeles	Oakland	Tacoma	Vancouver	Prince Rupert	New York	Baltimore	Norfolk	Charleston	Houston
Shanghai	15	22	14	20	16	29	43	33	31	29
Yantian	16	25	16	26	20	35	42	39	40	30
Ningbo	18	25	16	23	19	32	42	36	34	33
Qingdao	17	29	15	21	21	39	46	43	36	30
Xiamen	19	26	16	25	18	34	41	38	39	32
Nansha	18	42	33	39	34	38	44	41	42	49
Vung Tau	21	36	19	29	23	32	38	35	36	36
Haiphong	23	30	21	28	23	37	42	40	38	35
Laem Chabang	23	30	21	32	25	33	40	37	38	36
Busan	13	20	11	17	13	33	43	36	31	26

**>90%**

Schedule  
reliability

**>85%**

of volume gets faster  
or remains same<sup>1)</sup>

## Asia – US West Coast

# Service Profile WC1



### KEY SERVICE VALUE PROPOSITION

- **Core service** connecting **Yantian** and the key growth market of **South Vietnam** to **Los Angeles**
- **Access to large recycling market** from Los Angeles to Nansha

### IMPORTANT CONNECTION

- **Southeast Asia** markets served through shuttles via **Yantian** and **Vung Tau**

## Asia – US West Coast

# Service Profile WC2



### KEY SERVICE VALUE PROPOSITION

- **Fast Central and North China** connections to **Los Angeles** and **Oakland**
- **Non-stop** fast transit from **Korean market** to Los Angeles

### IMPORTANT CONNECTIONS

- **Japan** served via **Shanghai shuttle**
- **Bohai Sea** served via **Busan shuttle**

## Asia – US West Coast

# Service Profile WC3



## KEY SERVICE VALUE PROPOSITION

- **Fast Canada only service** to Prince Rupert and Vancouver
- **Further relay** to our **extensive inland network** connecting to all key rail ramps and doors in **Canada** and the **US**
- **Fast non-stop service from/to Yokohama**

## IMPORTANT CONNECTIONS

- Shuttle connections from **Thailand** (Laem Chabang) and **Vietnam** (Haiphong & Vung Tau) **via Yantian**

## Asia – US West Coast

# Service Profile WC4



### KEY SERVICE VALUE PROPOSITION

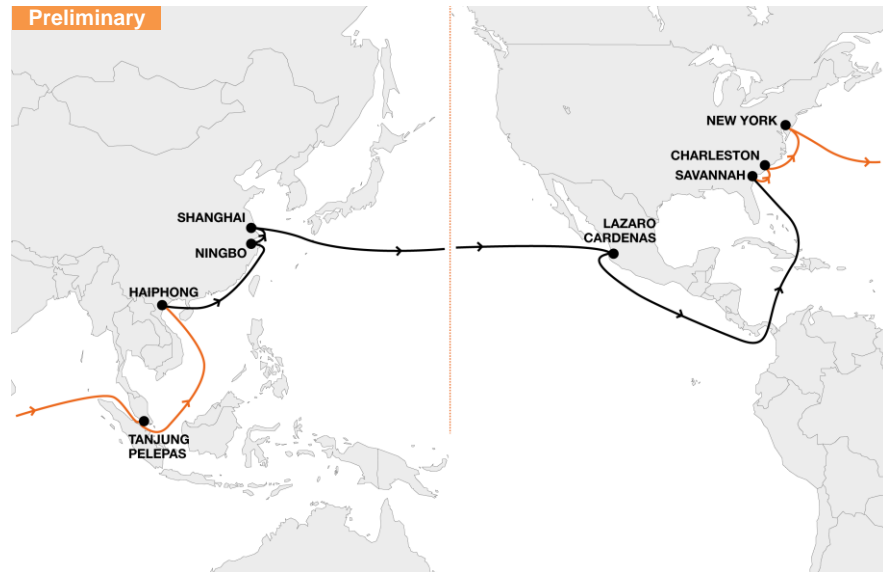
- **Core service** to **Tacoma** and **Vancouver IPI** gateways with relay to all key rail ramps and doors
- **Fast service from Central China** (Shanghai & Ningbo)
- **Fast non-stop** service from **Korean market** to **Tacoma**

### IMPORTANT CONNECTIONS

- **Shuttle** connections from Qingdao, Dalian and Xingang via **Busan**

## Asia – US East Coast

# Service Profile US1



## KEY SERVICE VALUE PROPOSITION

- **Core service** from the fast-growing **North Vietnam** market via Panama Canal to the **US East Coast**
- **Fast service from Central China** (Shanghai & Ningbo) to US East Coast South Atlantic range (Savannah & Charleston)
- **Extended coverage** from Ningbo and Shanghai via hub in **Lazaro**

## IMPORTANT CONNECTIONS

- **Southeast Asia** coverage via **Tanjung Pelepas** hub
- **Japan** served by shuttle via **Shanghai**
- **Hinterland access to Dallas** and beyond via **Lazaro** through cross-border rail network

## Asia – US East Coast

# Service Profile US2

Preliminary



## KEY SERVICE VALUE PROPOSITION

- **Core service** from **Central China** and **South China** via Panama Canal to **US East Coast**

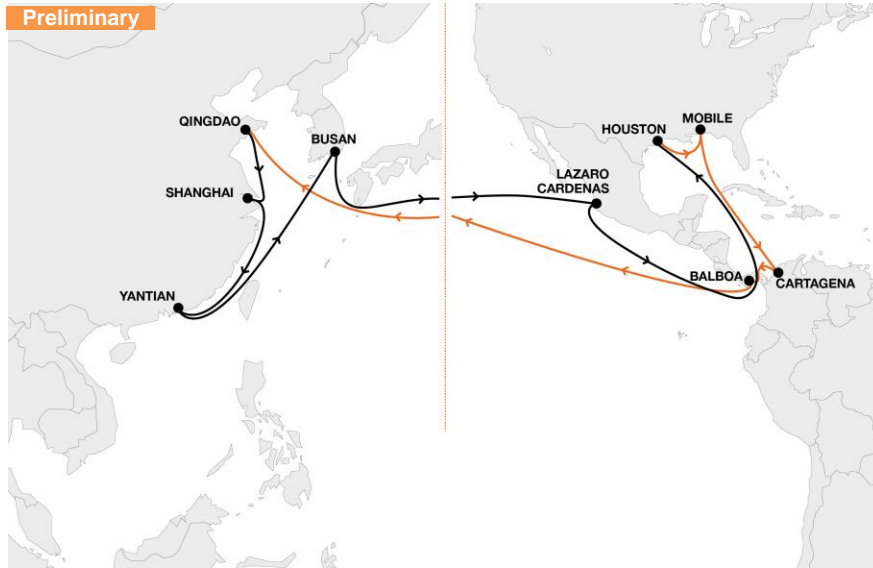
## IMPORTANT CONNECTIONS

- **Shuttle** connection from **Vietnam** (Haiphong & Vung Tau) via **Yantian**
- **Japan** served by shuttle via **Shanghai**
- **Central/South America** connections via **Cartagena** hub

## Asia – US Gulf Coast

# Service Profile US3

Preliminary



## KEY SERVICE VALUE PROPOSITION

- **Core service** from **China and Korea** via Panama Canal to the **US Gulf**
- **Extended coverage** from **Busan**, including hub in **Lazaro**

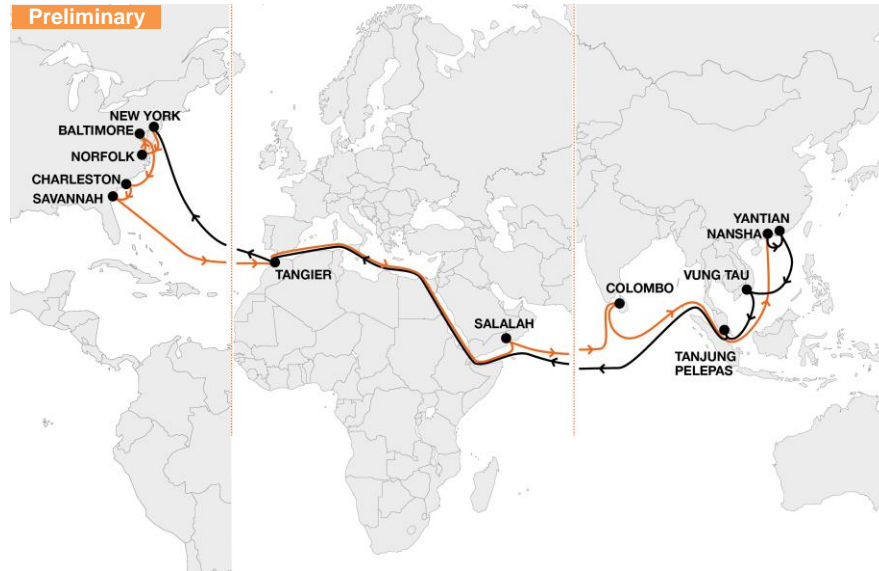
## IMPORTANT CONNECTIONS

- Shuttle connection **from Japan** to **US Gulf** via **Shanghai**
- **Access to Dallas** and beyond **via Lazaro** through cross-border rail network



## Asia – US East Coast

# Service Profile US4



## KEY SERVICE VALUE PROPOSITION

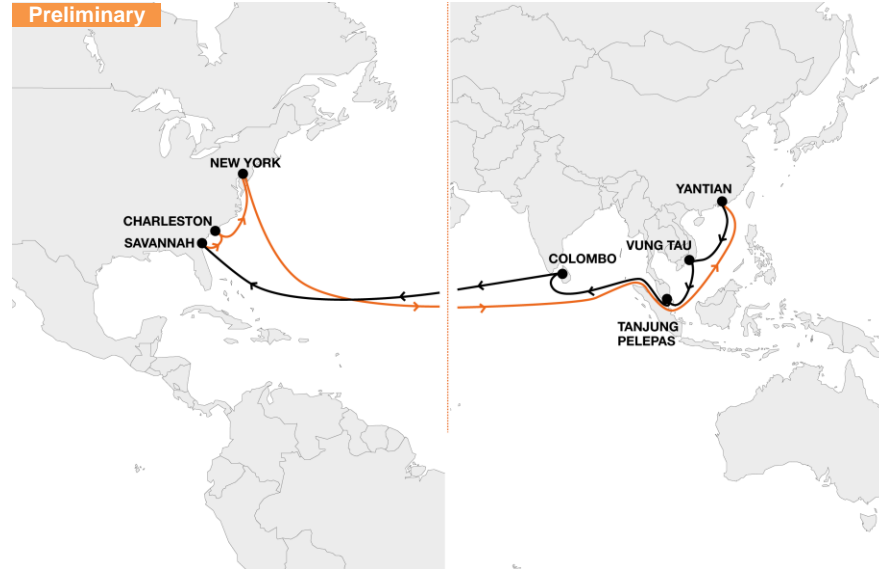
- Service connecting core **South China** and **Vietnam** markets with the **US North Atlantic ports**
- New connection to **Baltimore**
- **Connection** into **Middle East, India** and **Bangladesh** via Salalah and Colombo from the **US East Coast**

## IMPORTANT CONNECTIONS

- **Further Southeast Asia** to US East Coast ports through shuttles via **Tanjung Pelepas** hub

## Asia – US East Coast

# Service Profile US5



### KEY SERVICE VALUE PROPOSITION

- Service connecting core **South China** and **Vietnam** to the **South Atlantic ports**
- Connecting **Bangladesh** and **South-East India** via **Colombo** to **Savannah** and **Charleston**

### IMPORTANT CONNECTIONS

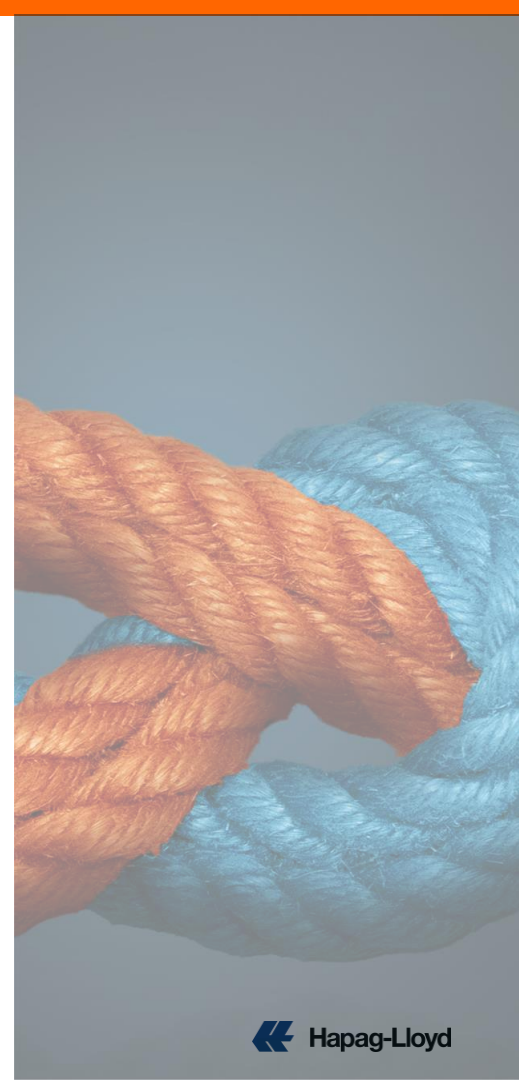
- **Southeast Asia** connected through shuttle via **Tanjung Pelepas** to South Atlantic ports

# Agenda

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## Highlights of the future Middle East product

- **Reliable and fast** service **network** between Europe and India / Middle East
- **Broad coverage** of all **key markets** in Middle East, North and South Europe through a **dedicated shuttle network, seamlessly connected** in selected own and / or controlled **hubs**
- **Multiple options** with improved **connectivity** to key trades, e.g. **Africa, Atlantic, Far East, Latin America** and **Transpacific**



## Our future Middle East product in numbers

### KEY FACTS

4

# Services

31

# Vessels

10

Ø Calls per service

14.5 TTEU

Ø Vessel size

25

ports covered in Europe

15

ports covered in  
Middle East (incl. India)

14

shuttles  
connecting  
hubs  
and European  
gateways

4

shuttles  
connecting hubs  
and Middle Eastern  
gateways



Go to shuttle  
network

# Key features and improvements of our future Middle East product

## Transit times for selected port pairs (across Middle East Network)

*Preliminary and subject to final network design*

	TO									
FROM	Jebel Ali	Jeddah	Dammam	Hamad	Salalah	Nhava Sheva	Mundra	Chennai	Karachi	Colombo
Hamburg	27	17	29	29	23	34	31	27	28	28
Rotterdam	29	13	32	22	16	26	34	28	23	28
London Gateway	23	13	25	25	19	30	28	29	25	33
Genoa	15	8	23	16	16	21	18	19	18	23
Izmit	16	10	18	17	12	22	19	16	18	23

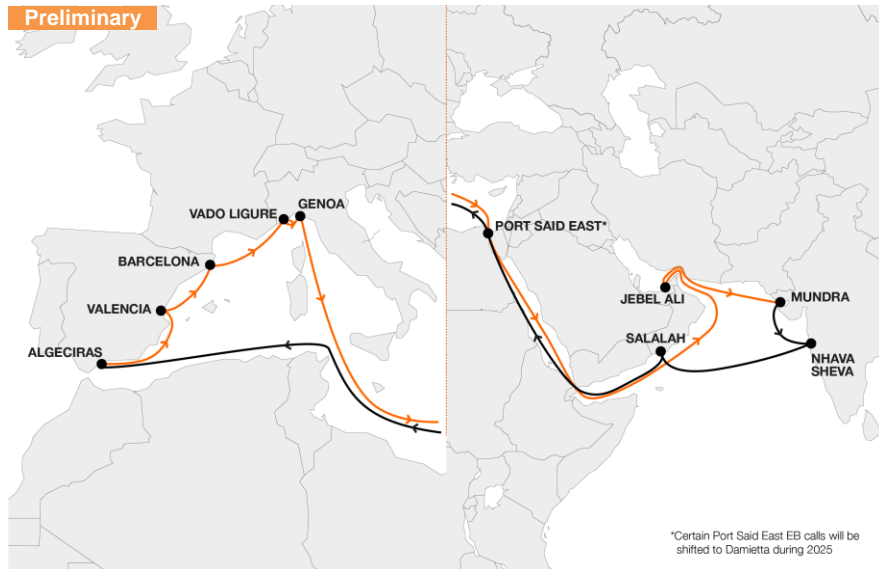
	TO									
FROM	Hamburg	Rotterdam	Antwerp	London Gateway	Valencia	Fos-sur-Mer	Genoa	Istanbul	Mersin	Izmit
Nhava Sheva	25	22	22	28	19	21	20	15	12	15
Mundra	28	26	25	26	22	25	23	18	15	19
Chennai	33 <sup>2)</sup>	28	29	29	26	31	30	23	19	20
Jubail	28	27	27	30	22	26	25	19	15	18
Jeddah	17	14	14	20	11	13	12	9	5	7

**>90%**  
Schedule  
reliability

**>75%**  
of volume gets faster  
or remains same<sup>1)</sup>

## Middle East – Mediterranean Service Profile IMX

Preliminary



### KEY SERVICE VALUE PROPOSITION

- **Core service** connecting **Spain** and **Italy** with **Middle East** and **West India**
- **Prime product** especially interesting for **sensitive / high value cargo** e.g. reefer, OOG and break-bulk
- Fast connection to and from **Mundra** and **Nhava Sheva** to key ports in **Spain** and **Italy**

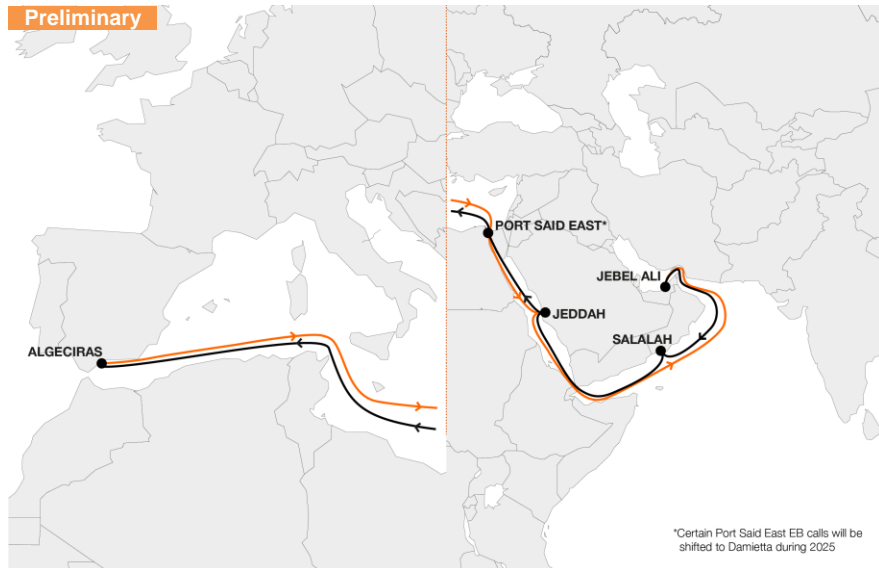
### IMPORTANT CONNECTIONS

- **Fastest** connection out of **Pakistan** through shuttle via **Salalah** hub
- **Access** to **Türkiye, Greece, Levant** and **Black Sea** from / to **Indian market** via shuttles and feeders
- **Fos-sur-Mer** connected **via** dedicated shuttle from **Barcelona**

## Middle East – Mediterranean

# Service Profile MMX

Preliminary



## KEY SERVICE VALUE PROPOSITION

- **Service** connecting **all hubs** in the **Mediterranean** and **Middle East** providing **multiple connections** to US East Coast, Latin America and Africa

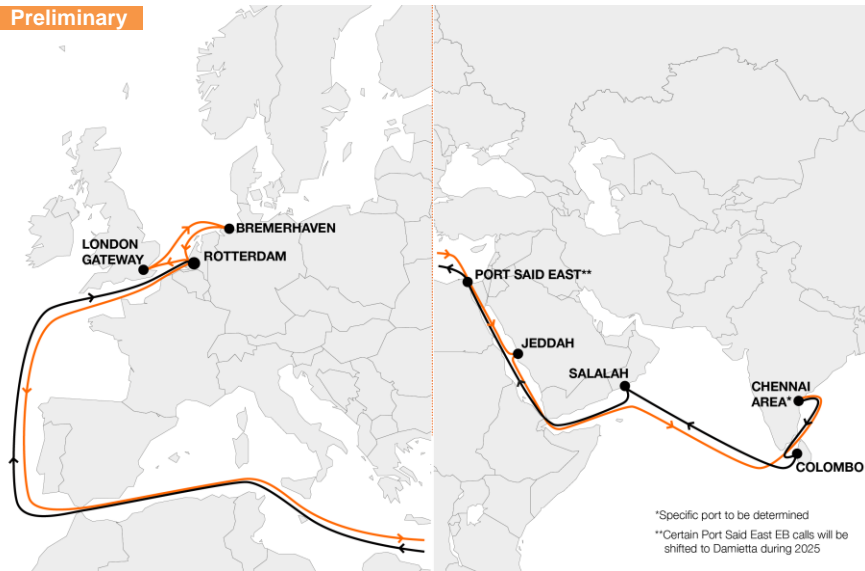
## IMPORTANT CONNECTIONS

- **Extensive** and **fast connection** from **Arabian Gulf** to **Türkiye** via shuttle network in **Jebel Ali** and **Port Said**
- **Fastest** connection into and out of **Pakistan** through shuttle via **Salalah** to hubs in **East and West Med**
- **Le Havre** and **Antwerp** connected via dedicated shuttle from **Algeciras hub** allowing fast connection to the Red Sea and Arabian Gulf



## Middle East – North Europe Service Profile IEX

Preliminary



### KEY SERVICE VALUE PROPOSITION

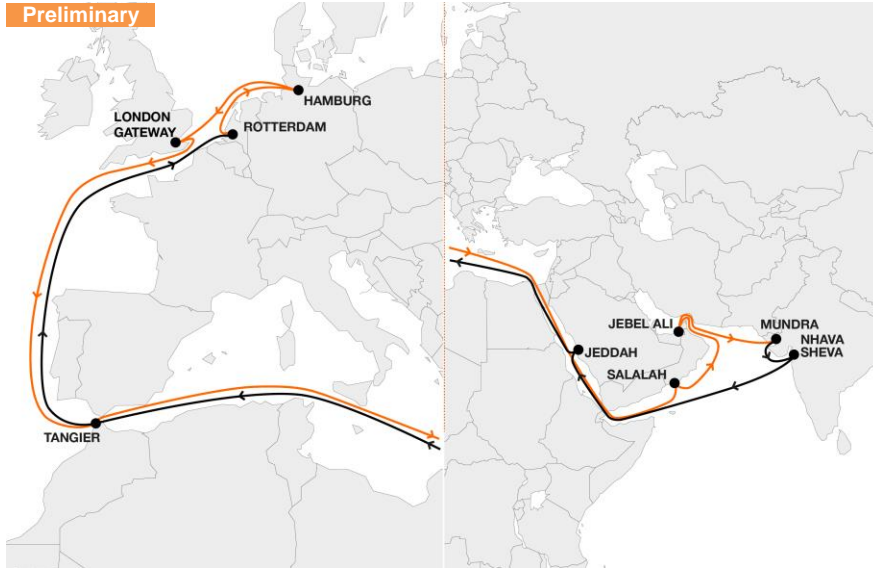
- **Dedicated** and **direct South-East India product** with attractive connection to **North Europe**
- **Prime product** especially interesting for **sensitive / high value cargo** e.g. reefer, OOG and break-bulk

### IMPORTANT CONNECTIONS

- Offering a **well-established** and **competitive** connection from **Bangladesh to Rotterdam and UK**
- Connecting **Baltic** and **Scandinavian** markets via **Bremerhaven**
- **Le Havre** and **Antwerp** connected through shuttle via **Rotterdam**
- Connection from and to **Türkiye, Greece, Levant and Black Sea** with the **Indian East Coast** market through shuttle and feeder network from **Port Said**

## Middle East – North Europe Service Profile IOS

Preliminary



### KEY SERVICE VALUE PROPOSITION

- Fast connection to and from **Mundra** and **Nhava Sheva** to **Rotterdam**, **Hamburg** and **UK**
- **Core service** between **North Europe** and **Red Sea**, **Arabian Gulf** and **India**

### IMPORTANT CONNECTIONS

- **Le Havre** and **Antwerp** connected via **dedicated shuttle** from **Tangier hub** as well as **Rotterdam**
- Connecting **Baltic** and **Scandinavian markets** via **Hamburg**
- **Multiple connection** options from the **Arabian Gulf**, **Indian Subcontinent** and **Red Sea**
- **Fastest** connection into **Pakistan** through shuttle via **Salalah**

# Agenda

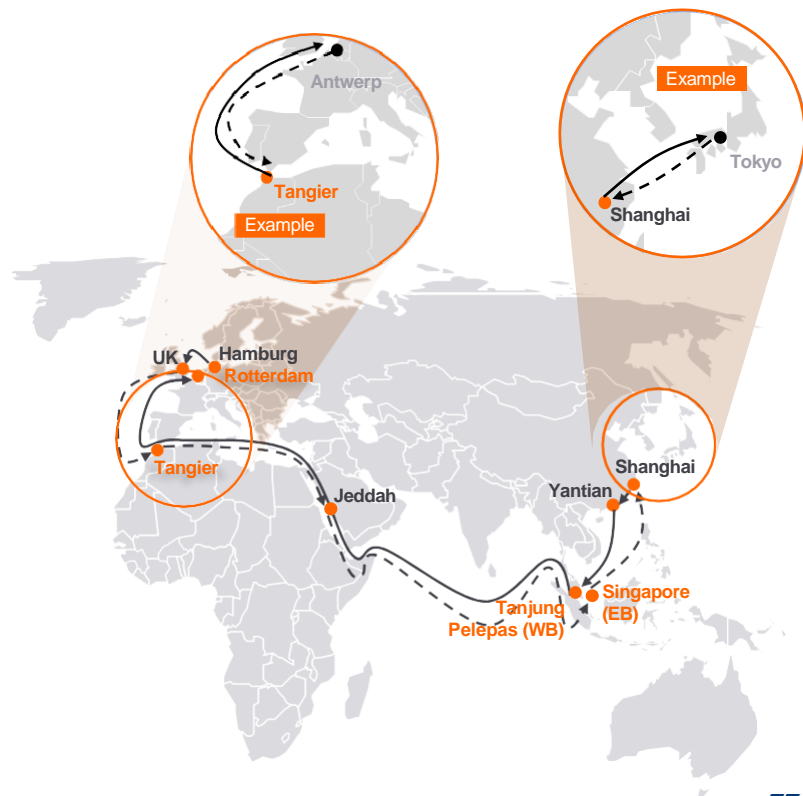
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<b>F.</b>	<b>Overview Shuttle Network and Intra Regional Trades</b>	<b>51</b>

# The joint network uses a hub & spoke model to make it much more reliable and resilient, with fast connectivity

## NETWORK PRINCIPLES

- **Setup with 2-3 main port calls** per region including strategic hubs will enable shorter round voyage times and better reliability
- **All hub terminals are owned and / or controlled** by Hapag-Lloyd or Maersk (except Singapore and Cartagena) and have been **carefully selected for top quality & reliability**
- Hub & spoke with multiple shuttles will provide **wide coverage** and **fast connections**
- Connections from **mainliners to mainliners** and **to shuttles** will be **synchronized** to significantly reduce dwell times

This network is much more **reliable** and **interconnected** than traditional setups, increasing **resilience** against external effects. We will reach this through a combination of streamlined port calls, controlled hubs and dedicated shuttle services



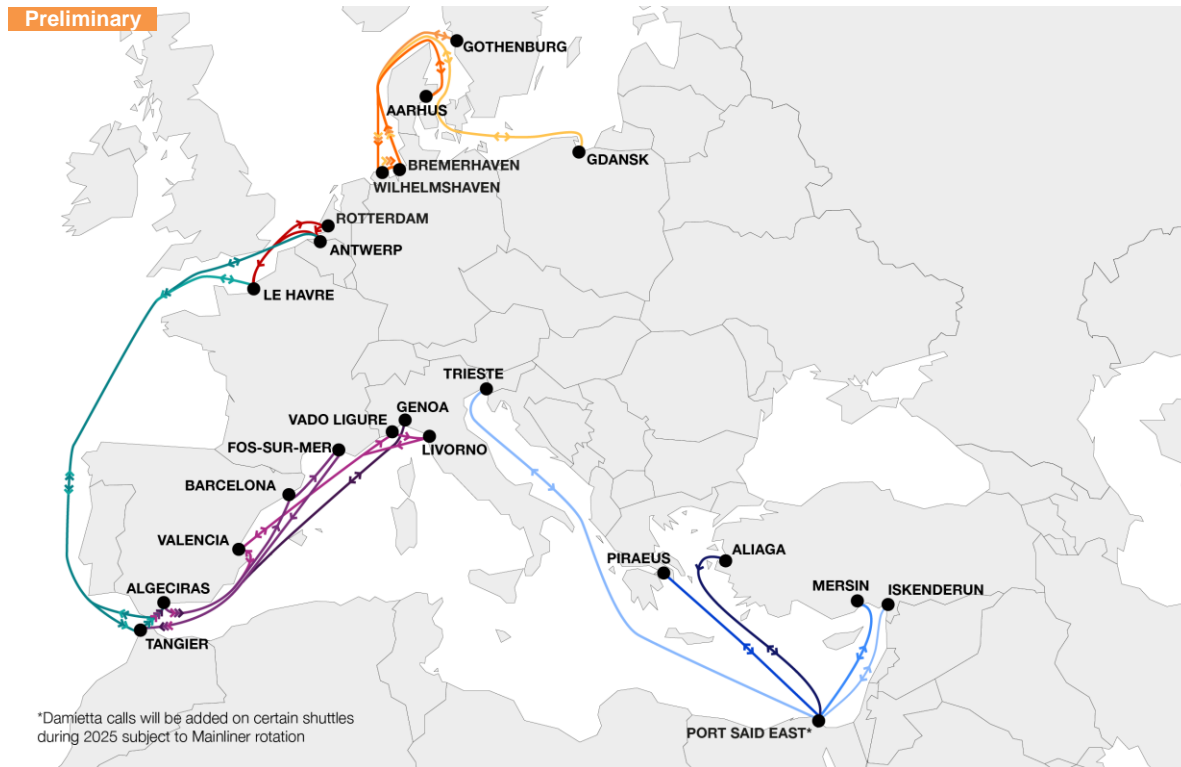
# Our dedicated shuttles complement our network with fast and reliable connections within the regions and also serve Intra Regional Trades

## HIGHLIGHTS

- **Extensive shuttle network** covering Europe, Asia, Middle East and North America
- **Shuttles** are dedicated to **serve** the **Gemini Cooperation** partners
- All shuttle vessels are **deployed by** the **Gemini Cooperation** partners
- The shuttle network also offers **competitive solutions** for **Intra Regional Trade** cargo
- **Shuttles** will also connect to **selected other Hapag-Lloyd services** that are not part of the Gemini Cooperation



# Europe Shuttles



## KEY FACTS

14 shuttles

23 ports

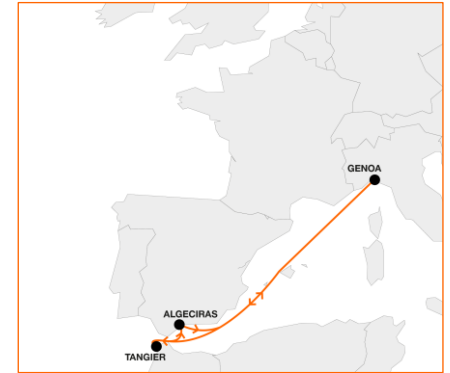
19 vessels

5 TTEU Ø vessel size

3 calls per shuttle (Ø)

# Europe Shuttles (1/2)

Preliminary



# Europe Shuttles (2/2)

Preliminary





# Asia Shuttles (1/2)



## KEY FACTS

13 shuttles

18 ports

30 vessels

6 TTEU Ø vessel size

4 calls per shuttle (Ø)

## Asia Shuttles (2/2)



### KEY FACTS

13 shuttles

18 ports

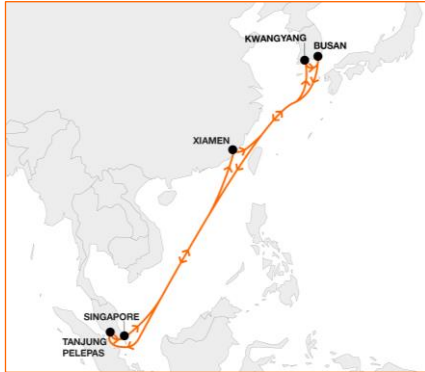
30 vessels

6 TTEU Ø vessel size

4 calls per shuttle (Ø)

# Asia Shuttles (1/2)

Preliminary



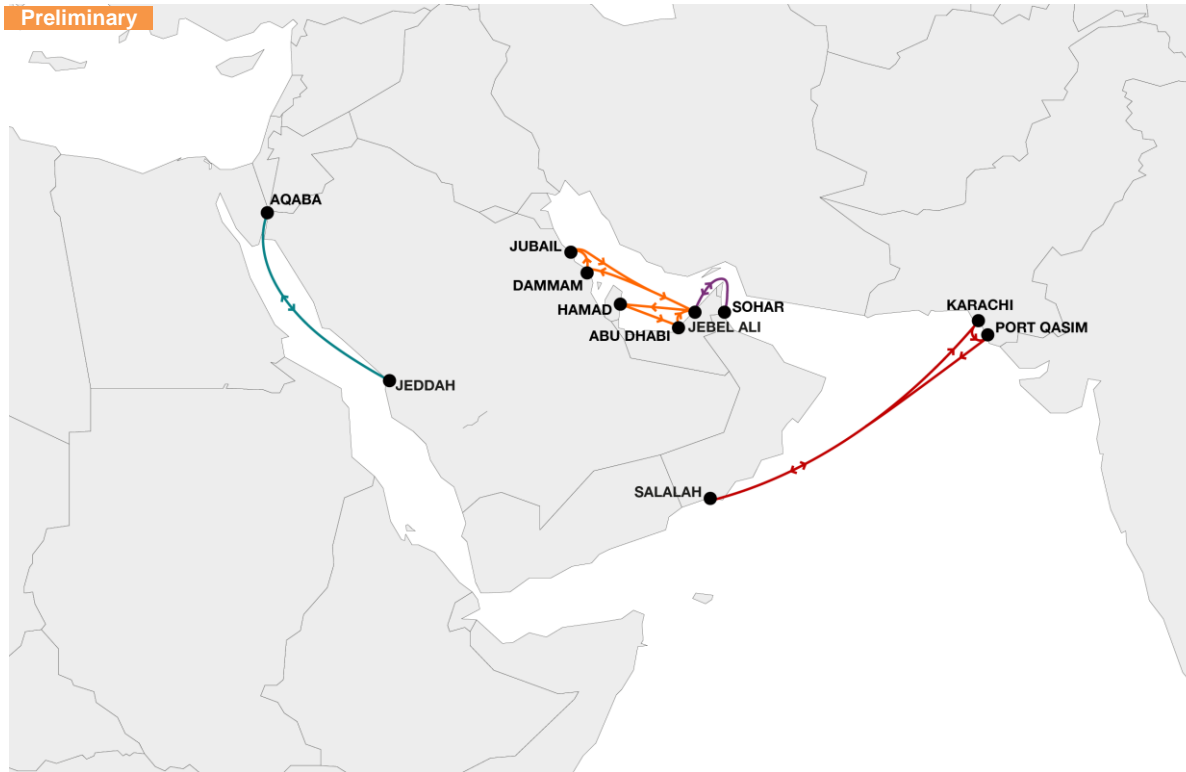
# Asia Shuttles (2/2)

Preliminary



# Middle East Shuttles

Preliminary



## KEY FACTS

4 shuttles

11 ports

6 vessels

6 TTEU Ø vessel size

3 calls per shuttle (Ø)

# Middle East Shuttles

Preliminary



# North America Shuttle



## KEY FACTS

1 shuttle

3 ports

2 vessels

2.5 TTEU Ø vessel size

3 calls per shuttle (Ø)

FOLLOW OUR STORY



**Thank you for your attention!**





# DISCLAIMER

## Disclaimer

This presentation contains forward-looking statements that involve a number of risks and uncertainties. Such statements are based on a number of assumptions, estimates, projections or plans that, by their nature, are subject to significant risks, uncertainties and contingencies. Actual results may differ materially from the Companies' forward-looking statements and expected results.