



Maritime Strategies International Ltd.

Marketing Strategy Intelligence Service (MSIS)

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I. Introduction

MSI's Marketing Strategy Intelligence Service (MSIS) provides maritime equipment and service suppliers with a detailed and dynamic profile of their ship operator customers. Building upon the forecast newbuilding volumes in our SHIPS service, MSIS provides suppliers with a detailed break-down of their market by sector, region and ship type.

MSI's Marketing Strategy Intelligence Service (MSIS) examines the fleet dynamics and future tonnage profiles by operating country/region and vessel type, size range.

MSIS examines both current and future fleet dynamics by geographical region and vessel type. The service comprises of two interdependent sections:

- **Current operating structure** of the world merchant fleet by country/region and vessel type
- **Historical and forecast fleet dynamics**, by operator country/region and vessel type

The twice yearly reports can be customised to meet individual client requirements either for their existing product range, market shares and customer base or to analyse growth rates, risks and alternative routes to market for potential new ones.

II. Data Coverage and Sources

Historical data is sourced principally from Clarkson and Lloyd's Register Fairplay and is converted to annual timeseries. MSI's forecasting models provide a year-by-year outlook on a five-year rolling horizon. The data is presented in both Gross Tonnes (GT) and number of vessel units.

MSIS uses a minimum threshold of 5,000 Gross Tonnes (GT) for all countries and regions in order to exclude small intra-regional/coastal vessels.

The sectors covered are as follows:

- Oil Tankers
- Dry Bulk Carriers
- Chemical Tankers
- LPG Carriers
- LNG Carriers
- Containerships
- General Cargo Ships
- Refrigerated Ships
- RoRos
- Passenger Ships
- Pure Car Carriers

Each of the sub-sectors is further disaggregated by the operators' country or region of domicile. Major shipping nations are analysed as an entity, whereas others are grouped into regions to provide fleets with significant tonnage for analysis.



III. Report Contents

A. Fleet and Activity Sheets

MSIS results are presented in Microsoft Excel® workbooks. These cover, by country/region and ship type, all operators in terms of current fleet capacity (in GT), and recent market investment/divestment activity (new orders, second hand purchases and demolitions). A summary ranked league table presents the top 30 companies along with smaller active market participants, the rankings assigned to each are based on GT.

Datasheets are presented for each of the 17 country/regions, with each fleet broken down by vessel type and size. Annual historical and forecast tonnage, along with the number of vessels, is presented for:

- Fleet size
- Deliveries
- Deletions
- Sale & Purchase Activity
- Current Orderbook
- Fleet Age Profile

The percentage world market share and year-on-year percentage changes are highlighted. In addition this analysis is also summarised graphically.

To accompany the country/region datasheets the report includes a series of aggregated workbooks enabling easy and structured cross comparisons to be made between country/region and vessel types.

B. Market Commentary

For each country/region and vessel sector there is a concise commentary tracking historical performance and market outlook for fleet growth performance, fleet age profile and fleet operator developments. This text is accompanied by a series of graphical overviews.




IV. Sample Screenshots

A. Fleet and Activity Sheet

S Korea Fleet by Operator					@ 1st March 2009		
Rank	Operator	Operator CoD	Total GT	Number of Vessels	Total GT		
					Secondhand Activity*	Orderbook	Scrapping*
1	Example 1	South Korea	7,536,404	105	432,411	613,900	79,352
2	Example 2	South Korea	6,934,721	134	235,917	3,586,984	
3	Example 3	South Korea	4,174,667	113	1,249,676	2,815,245	30,738
4	Example 4	South Korea	3,570,084	73	237,295	401,551	23,107
5	Example 5	South Korea	2,615,588	28	483,335	2,152,300	49,685
6	Example 6	South Korea	1,963,170	27	327,079	1,835,000	
7	Example 7	South Korea	1,380,395	21	938,017	1,285,800	
8	Example 8	South Korea	763,864	17	653,420		
9	Example 9	South Korea	596,879	4	443,547		
10	Example 10	South Korea	469,819	3			
11	Example 11	South Korea	318,661	11	134,809		
12	Example 12	South Korea	272,607	12			
13	Example 13	South Korea	263,235	9	200,817		
14	Example 14	South Korea	254,406	20	92,895		
15	Example 15	South Korea	251,177	7	222,540	173,480	
16	Example 16	South Korea	232,837	3	155,705	634,580	
17	Example 17	South Korea	209,482	14			
18	Example 18	South Korea	202,761	4		246,696	
19	Example 19	South Korea	180,615	7	157,343		
20	Example 20	South Korea	179,188	2			
21	Example 21	South Korea	174,706	12	11,193	42,200	
22	Example 22	South Korea	166,007	15	48,556		
23	Example 23	South Korea	164,005	6	74,740		34,675
24	Example 24	South Korea	162,067	4	125,783	42,000	
25	Example 25	South Korea	157,662	4		53,360	
26	Example 26	South Korea	156,852	1	156,852		
27	Example 27	South Korea	152,788	6	103,615	97,193	
28	Example 28	South Korea	151,430	5	151,430		
29	Example 29	South Korea	147,476	7	45,376	16,989	
30	Example 30	South Korea	140,084	5	107,478		
31	Example 31	South Korea	122,887	12	21,390	184,440	
32	Example 32	South Korea	113,960	3	38,637	360,000	
33	Example 33	South Korea	112,305	5	95,544	495,000	
34	Example 34	South Korea	110,752	2	110,752		
37	Example 35	South Korea	93,346	2	77,453	280,032	
40	Example 36	South Korea	76,925	1		846,400	
44	Example 37	South Korea	69,953	4	16,485	148,814	
57	Example 38	South Korea	44,049	3	18,810	124,000	6,412
85	Example 39	South Korea	19948	3		89600	
Top 30* sub Total			34,707,762	93%			
Others			2,651,899	7%			
Total			37,359,661				

* Measured over the last 2.5 years
 # Top 30 Plus Active Players





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B. Fleet Datasheet & Forecasts

Fleet Development By Ship Type 2004-2013			MIDDLE EAST					@ December 31st 2008					
Note: % Market Share Relates to the Percentage (By Gross Tonnage) of the World Fleet By Vessel Type													
Fleet Segment	No.Vs/ GT (Mill)	Size Cat 000 GT	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	
Tanker	% Market Share		7%	7%	7%	7%	8%	8%	8%	9%	9%	9%	
	No.Vs/ GT (Mill)	Total	x	x	x	x	178	x	x	x	x	x	
	% Change		0.00	0.00	-1.33	5.41	14.10	9.97	4.01	14.16	7.47	5.91	
	GT (Mill)		y	y	y	y	15.99	y	y	y	y	y	
	% Change		-6.77	7.93	-4.90	9.71	21.74	8.85	4.99	11.29	5.24	2.94	
	No.Vs/ GT (Mill)	5-70kDWT	x	x	x	x	62						
	% Change		12.50	-13.89	4.84	-6.15	1.64						
	GT (Mill)		y	y	y	y	1.26						
	% Change		15.16	-17.70	11.04	-10.78	-7.52						
	No.Vs/ GT (Mill)	70-125kDWT	x	x	x	x	27						
	% Change		-15.00	17.65	0.00	20.00	12.50						
	GT (Mill)		y	y	y	y	1.50						
	% Change		-11.27	14.07	0.79	19.40	14.33						
	No.Vs/ GT (Mill)	125-200kDWT	x	x	x	x	12						
	% Change		33.33	0.00	0.00	25.00	20.00						
GT (Mill)		y	y	y	y	0.99							
% Change		32.75	0.00	0.00	24.54	22.11							
No.Vs/ GT (Mill)	200k+DWT	x	x	x	x	77							
% Change		-11.67	13.21	-8.33	10.91	26.23							
GT (Mill)		y	y	y	y	12.25							
% Change		-11.64	12.94	-8.20	10.98	26.83							
Dry Bulk	% Market Share		2%	2%	2%	2%	2%	2%	2%	2%	2%	2%	
	No.Vs/ GT (Mill)	Total	x	x	x	x	201	x	x	x	x	x	
	% Change		34.23	-8.05	10.95	5.92	24.84	-1.64	5.31	3.84	-1.68	3.29	
	GT (Mill)		y	y	y	y	4.67	y	y	y	y	y	
	% Change		21.28	5.42	8.56	7.01	24.76	0.74	2.57	14.41	11.13	6.74	
	No.Vs/ GT (Mill)	5-50kDWT	x	x	x	x	146						
	% Change		40.23	-13.93	11.43	2.56	21.67						
	GT (Mill)		y	y	y	y	2.47						
	% Change		29.86	-3.38	11.93	1.65	18.80						
	No.Vs/ GT (Mill)	50-80kDWT	x	x	x	x	48						
	% Change		14.29	16.67	14.29	15.63	29.73						
	GT (Mill)		y	y	y	y	1.71						
	% Change		12.96	15.48	14.76	14.01	27.59						
	No.Vs/ GT (Mill)	80-150kDWT	x	x	x	x	4						
	% Change		-	-	-	-	300.00						
GT (Mill)		y	y	y	y	0.21							
% Change		-	-	-	-	356.68							
No.Vs/ GT (Mill)	150k+DWT	x	x	x	x	3							
% Change													
GT (Mill)		y	y	y	y	0.28							
% Change		0.00	33.00	-25.04	0.00	0.00							
Chemical Tanker	% Market Share		3%	4%	4%	4%	4%	4%	4%	4%	4%	5%	
No.Vs/ GT (Mill)	Total	x	x	x	x	69	x	x	x	x	x	x	
% Change			-18.18	77.78	-6.25	28.80	18.07	7.08	8.22	24.52	13.71	21.23	



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V. Deliverables

MSIS is updated twice yearly. It is available in electronic format of Microsoft Excel®, Microsoft PowerPoint® and Adobe PDF®. The entire data set is accessible in Microsoft Excel®. MSIS is distributed either via email or CD.

Clients will also receive full telephone support and access to MSI's senior consultants.