



# Container Shipping Market Services



## REPORTS

In-depth quarterly market reports and monthly market briefs



## VALUATIONS

Current and forecast asset values, including earnings and operating costs



## MODELS

Interactive econometric models for scenario and sensitivity analysis



## BENCHMARKING

AI-augmented AIS data tools for operation and emissions benchmarking



## CONSULTANCY

MSI advises clients on projects and markets across all maritime sectors



# Market Reports



MSI's market reports are at the heart of our services, bringing together an exceptional range and depth of market knowledge.

## Coverage of Data and Analysis

- Macroeconomic drivers (GDP, IIP, Forex..)
- Bilateral container trade flows covering all region-to-region and intra-regional trades
- Container port throughput (loaded, transshipment, empty container lifts by region)
- Vessel supply – capacity changes, inactive vessels.
- Vessel deployment – containership deployment by tradelane and liner company
- Trading efficiencies – speeds, port days, average service rotation lengths, TEU-miles
- Market balances – vessel demand by tradelane (East-West, North-South, Intra-Regional), supply, load factors, and fleet employment/utilisation
- Operating cost, timecharter rate and price data for key containership benchmarks
- Spot freight rates and liner average \$/TEU liner revenues

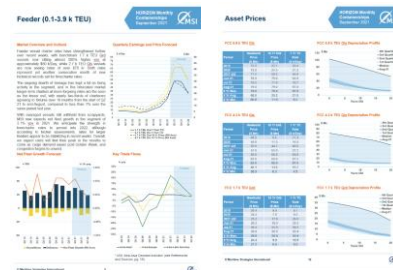


## HORIZON MONTHLY

Monthly briefing with a short-term outlook

- Summary
- Recent market developments
- Market outlook by segment
- Demand trends
- Freight rates
- Orderbook analysis
- Asset prices & recent sales
- Topical analysis
- Sectors compared

Frequency of Publication: Monthly  
Length: 20 pages  
Forecast Horizon: 2 quarters



## HORIZON QUARTERLY

Comprehensive, in-depth analysis

- Executive summary
- Macroeconomic outlook
- Container trade trends
- Fleet supply by size segment
- Containership deployment analysis
- Market balances, freight and T/C rates, and prices
- Scenario analysis
- Summary tables

Frequency of Publication: Quarterly  
Length: 100 pages  
Forecast Horizon: 5 years





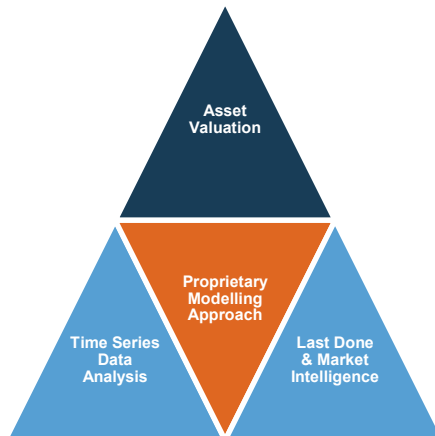
# Valuations



For over 40 years MSI has been providing independent spot and forecast prices and cash flows for containerships. MSI's methodology and approach is widely accepted and is the preferred choice for many industry stakeholders across the globe.

## MSI's independent valuations are derived by applying a meta-analysis approach in most instances:

- Benchmarked and analysed in relation to MSI's regularly published timeseries data across 80+ vessel types, sizes and ages
- Compared to last done sales and current market intelligence on likely sales candidates and quoted prices
- Assessed using MSI's proprietary econometric modelling process and algorithms developed over the last 40+ years



## MSI's valuation services include:

- Certificated spot current valuations
- Vessel forecasts (values, earnings, newbuilding prices, scrap price and operating costs)
- Charter attached valuations
- Forecast value sensitivity and stress testing
- Alternative values including: soft value, forced value, recessionary value, cautious plausible value, 1 in 100 value etc.
- Valuation reports and briefing notes
- Restructuring support and benchmarking
- Expert witness/Expert testimony



## MSI's online valuation services

Forecast Marine eValuator (FMV) provides instant online access to historical, current and forecast earnings, operating costs and values on a vessel-by-vessel or portfolio basis.





# Interactive Forecasting Models

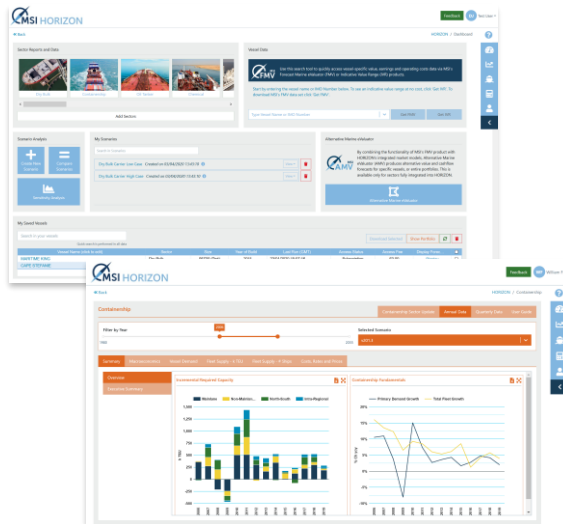


*“Amid the noise and volatility of global shipping markets, MSI HORIZON provides a welcome shot of quantitative transparency. The system’s analytical tools empower the user, enabling them to model alternative scenarios for market fundamentals and visualise the impact these changes will have on vessels’ earnings and values.”*

**Dr Adam Kent, Managing Director**

Launched in 2019, MSI’s proprietary online intelligence platform, **MSI HORIZON** provides clients with on-demand access to our range of market intelligence services on the shipping, offshore and allied industries. Integrated into this system is Forecast Marine eValuator (FMV), MSI’s online asset valuation product.

Designed for ease of use, MSI HORIZON combines a user-friendly interface with the latest data and technology to give users unparalleled insights into the dry bulk shipping market.



## AMEND INPUTS

Easy-to-modify assumptions across a range of inputs.

### Dry Bulk: (2) Coal

Timeseries	2020	2021
Canada Coal: Export	32.40	30.85
US Coal: Export	66.80	63.61
Colombia Coal: Export	76.95	77.17
Poland Coal: Export	4.23	4.10
Russia Coal: Export	258.62	272.14
South Africa: Export	83.38	83.61
China Coal: Export	8.83	15.15
Indonesia Coal: Export	483.99	471.30
Australia Coal: Export	407.72	422.32

## VISUALISE

Instant visual comparison of MSI’s base case vs. the client’s own scenario.



## EASY-TO-EXPORT

Detailed, easy-to-export time-series data from 1980 to 2035.

Employment Analysis for Bulkers

Timeseries	Unit	2015	2016	2017	2018
BKCN CRE					
Cargo	Mt	1,347.81	1,437.78	1,500.79	1,507.43
% Change	% Ch yoy	1.75	6.68	4.38	0.44
Cargo Tones per Det p.a.	T/Det	5.91	5.83	5.72	5.71
Det Employment	Mt Det	229.22	246.47	262.45	264.01
COAL					
Cargo	Mt	1,141.84	1,178.23	1,206.7	1,264.18
% Change	% Ch yoy	-7.17	3.2	2.42	4.76
Cargo Tones per Det p.a.	T/Det	8.33	8.21	8.15	8.17
Det Employment	Mt Det	137.11	143.9	148.94	154.7

<https://www.msiltd.com/#horizon>





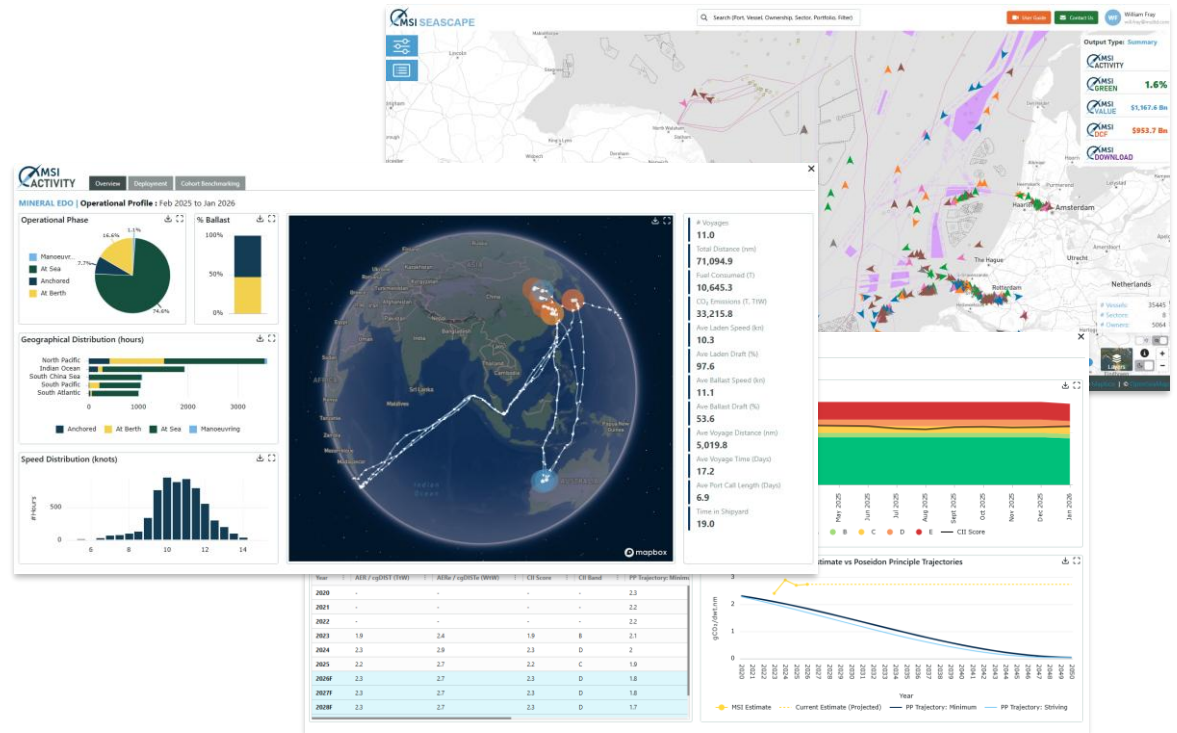
# Operational Benchmarking & Emissions



MSI SEASCAPE is a powerful online platform designed to provide a 360-degree view of ship performance, environmental compliance, and asset valuation.

Through AI-augmented AIS data, SEASCAPE transforms complex global shipping activity into clear, measurable and benchmarkable KPIs.

- **Operational Benchmarking:** Track speed, port stays, and voyage patterns. Compare your fleet's efficiency against real-world peer cohorts.
- **Green Metrics:** Stay ahead of the curve with AER and CII ratings. Visualize emissions (Tank-to-Wake and Well-to-Wake) and track alignment with the Poseidon Principles.
- **Asset Valuation:** Access fair market values, coupled with expert-led DCF assessments to identify "buy" or "sell" signals.



Whether you are a shipowner optimizing trading patterns, a lender performing due diligence, or an investor seeking undervalued assets, SEASCAPE provides the retrospective clarity and forward-looking insight required to navigate the future of shipping. Stop guessing, start benchmarking with MSI SEASCAPE.

<https://www.msilt.com/#seascape>





# Consultancy



MSI's advisory services draw upon our deep industry knowledge and expertise to develop innovative, data-driven solutions for our clients. MSI's team of consultants have broad experience from a range of sectors, industries and projects, complemented by a pool of external independent industry specialists. Our range of advisory services include:

## Strategic Advisory Services

- Project evaluation and market studies
- Business case development
- Market risk and sensitivity studies
- Strategic market positioning
- Competitor intelligence and benchmarking
- Port planning and feasibility studies
- IPO industry sections and investor materials

## Credit Markets & Modelling

- Advanced Credit Modelling

## Corporate Structuring & Litigation Support

- Corporate Restructuring and Insolvency
- Expert Witness Testimony and Litigation Support
- Business valuation services
- Mergers and acquisitions

## MSI Analytics

- Bespoke Model Development and Data Feeds
- Niche Market Modelling

Examples of successful projects delivered by MSI include:

### Business Case Study for Major Feeder Containership Owner

MSI was appointed by a independent containership owner to develop a feasibility and business case study for a planned expansion of its feeder containership fleet. As part of an extensive market report MSI delivered:

- a deep-dive into feeder containership demand and supply drivers, and liner company demand for feeder tonnage;
- granular analysis of feeder containership deployment, historical and present-day
- quantitative analysis and forecasts for containership deployment and cascading, highlighting infrastructural and economic obstacles to vessel upsizing in key markets;
- vessel timecharter rate and secondhand value forecasts, scenario analysis and risk factors;

### Container Freight Procurement Strategy for Agricultural Goods Exporter

The client, a global exporter of food industry products, required an external partner to improve its container freight procurement strategy and processes. In addition to extensive analysis of the exporter's freight requirements, KPIs and historical performance, MSI also delivered:

- a comprehensive introduction to container freight markets, covering demand and supply drivers, liner company dynamics, surcharges;
- mapping of the client's container freight volumes across five export origins and over 50 import destinations;
- benchmarking of the client's historic freight rate expenditure across multiple tradelanes;
- development of container freight KPIs through workshops and
- concrete recommendations around spot versus contract mix, use of freight forwarders, freight team structure;

### Container Throughput Forecast for US West Coast Container Terminal

MSI was appointed by an investor in a major US West Coast container terminal to provide a long-term container throughput forecast. MSI delivered an in-depth market study and multi-level (national, coastal, by port, and by terminal) TEU volume forecast to 2050, incorporating:

- drivers of US container import and export demand, including macroeconomic growth, population trends, and regional economic development patterns within the US;
- the coastal split of US container imports and its future development, analysing voyage costs, infrastructural investment, and relative strength of intermodal connections to hinterland regions;
- analysis of the terminal's competitive position within the US West Coast and relative to neighbouring facilities;
- an interactive Excel-based model allowing the client to simulate changes in key macro inputs;



# Meet the Container Team



**Daniel Richards**  
Director

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Daniel leads MSI's analysis of the containership markets, as well as the company's wider macroeconomic research and forecasts. Since joining in MSI in 2016 he has expanded MSI's container industry services, and advises our vessel owner, liner company, shipper, and financial sector clients.

Before joining MSI, Daniel worked as a think tank researcher in Washington, D.C. Daniel studied for an MA in International Relations and International Economics at the Johns Hopkins School of Advanced International Studies (SAIS), and a BA in History at the University of Cambridge.



**William Murphy**  
Analyst

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Will is responsible for carrying out containership research at MSI, contributing to market reports, maintaining MSI's database and applying modelling techniques to generate forecasts. He also supports the delivery of bespoke projects at MSI.

Will holds an MPhil in Biological Sciences and a BA in Natural Sciences from the University of Cambridge.

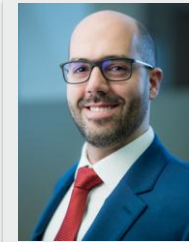


**Emma Farnsworth**  
Analyst

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Emma works as a Market Analyst within the dry shipping sectors, including dry bulk carriers, containers and multi-purpose vessels. She is responsible for maintaining MSI's market models and contributing to consultancy projects and market reports.

Emma holds a BSc in Marine Biology from Newcastle University.



**Daniel Macedo**  
Associate Director

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Daniel leads MSI's ship valuations service across all shipping sectors. He is responsible for MSI's shipping fleet analysis, vessel prices and earnings.

Prior to joining MSI, Daniel worked as Economic Research Analyst for Banco Federal. Daniel has an MBA from IE Business School and a BSc in Economics from Universidad Catolica Andres Bello.



# About MSI



For over 40 years, MSI has developed integrated relationship with a diverse client base of financial institutions, ship owners, shipyards, brokers, investors, insurers and equipment and service providers.

MSI's experience covers a broad range of shipping and offshore sectors, providing clients with a combination of sector reports, forecasting models, vessel valuations and bespoke consultancy services.



## Markets Covered by MSI:

- Crude Oil
- Oil Products
- LPG
- LNG
- Chemicals
- Shuttle Tankers
- MODUs
- AHTS/PSVs
- FPSO/FSRU
- WTIVs
- Dry Bulk
- Container
- PCTC
- RoRo/RoPax
- Cruise and Ferry
- Open Hatch
- Shortsea
- MPP
- Ports
- Shipbuilding
- Container boxes

MSI balances analytical power with service flexibility, offering a comprehensive support structure and a sound foundation on which to build investment strategies and monitor/assess exposure to market risks.



**To discuss our range of services further, please  
contact us:**

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**Register for a free trial of MSI Horizon:**

<https://apps.msiltd.com/account/register>