



Challenges faced by developing countries in the competition and regulation in the maritime transport sector: brasillian cases

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Round table: Challenges faced by developing countries in the competition and regulation in the maritime transport sector

Alexandre Cordeiro

Cartel Investigations:

- 2016: Maritime transport by Roll-on Roll-off ships
- 2010: Air and maritime international freight forwarder

Transactions

- 2017: 1 merger
 - 1 control acquisition
 - 1 VSA
 - 1 JV
- 2016: 1 merger
 - 1 SCA
 - 1 control acquisition
- 2014: 1 merger

Query Procedures:

- 2017: Questioning if VSA's are of mandatory notification
- 2016: Questioning if SCA's are of mandatory notification

30 main operators market share

TOP 100

Alphaliner TOP 100 / 29 Jun 2018



Global figures



6,134 active ships
including 5,267 fully cellular



22,297,703 TEU
21,886,213 TEU fully cellular



272,300,709 DWT

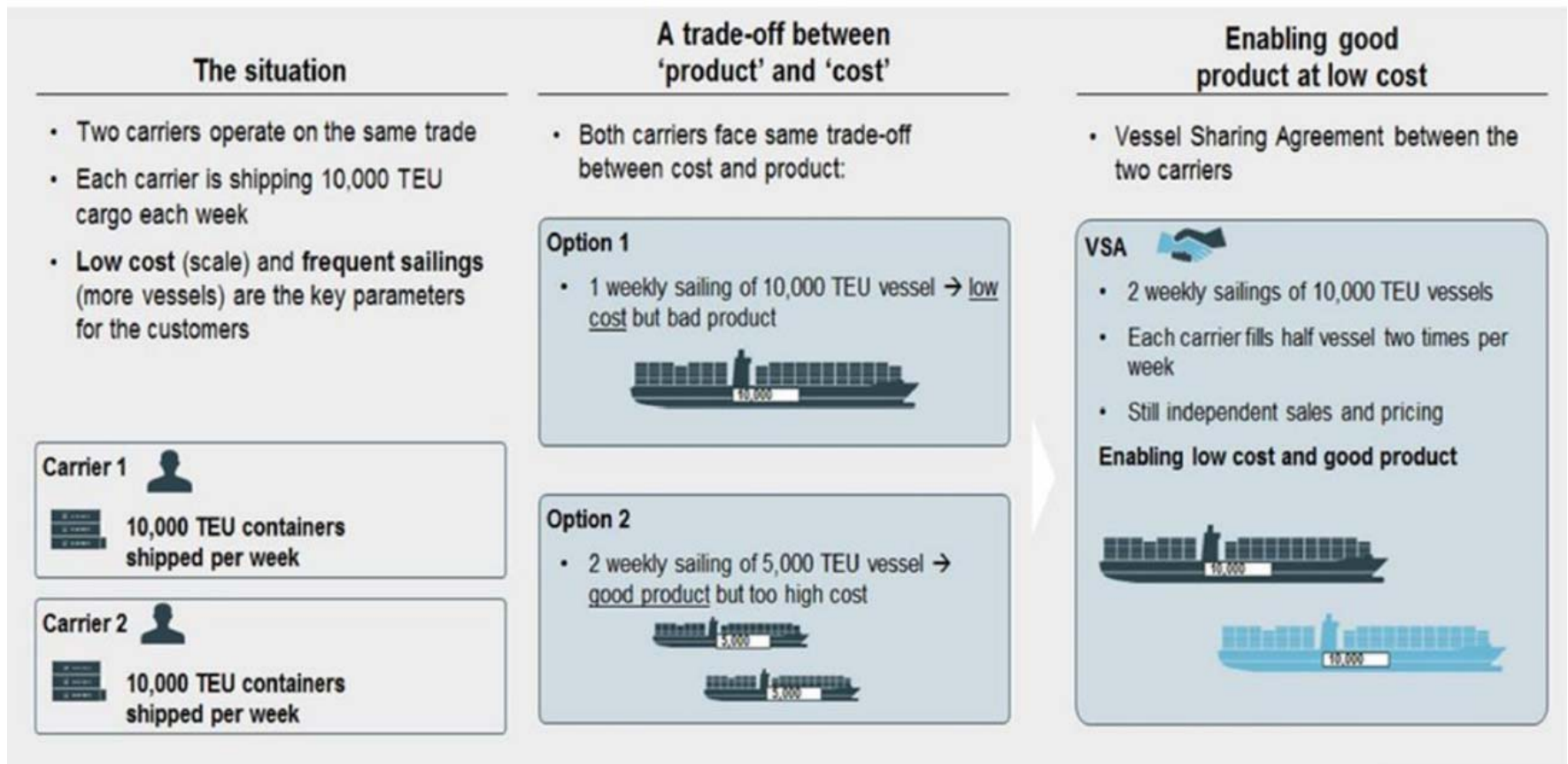
Figures are consolidated

Regional Trades
weekly capacities

Trans-Atlantic **138,739** TEU
Trans-Pacific **472,406** TEU
Feast-Europe **399,881** TEU

Rank	Operator	Teu	Share	Existing fleet	Orderbook
1	APM-Maersk	4,079,193	18.3%		
2	Mediterranean Shg Co	3,290,587	14.8%		
3	CMA CGM Group	2,604,116	11.7%		
4	COSCO Shipping Co Ltd	2,036,206	9.1%		
5	Hapag-Lloyd	1,605,152	7.2%		
6	ONE (Ocean Network Express)	1,571,459	7.0%		
7	Evergreen Line	1,111,594	5.0%		
8	OOCL	688,977	3.1%		
9	Yang Ming Marine Transport Corp.	631,614	2.8%		
10	Hyundai M.M.	413,853	1.9%		
11	PIL (Pacific Int. Line)	413,821	1.9%		
12	Zim	408,292	1.8%		
13	Wan Hai Lines	258,743	1.2%		
14	X-Press Feeders Group	137,978	0.6%		
15	KMTC	136,389	0.6%		
16	Antong Holdings (QASC)	134,603	0.6%		
17	Zhonggu Logistics Corp.	125,566	0.6%		
18	SITC	109,482	0.5%		
19	IRISL Group	96,383	0.4%		
20	SM Line Corp.	83,386	0.4%		
21	Arkas Line / EMES	72,815	0.3%		
22	TS Lines	71,660	0.3%		
23	Sinotrans	63,912	0.3%		
24	Sinokor	57,146	0.3%		
25	Salam Pacific Indonesia Lines	52,273	0.2%		
26	RCL (Regional Container L.)	45,568	0.2%		
27	Grimaldi (Napoli)	44,773	0.2%		
28	Emirates Shipping Line	43,943	0.2%		
29	UniFeeder	43,716	0.2%		
30	Matson	43,062	0.2%		

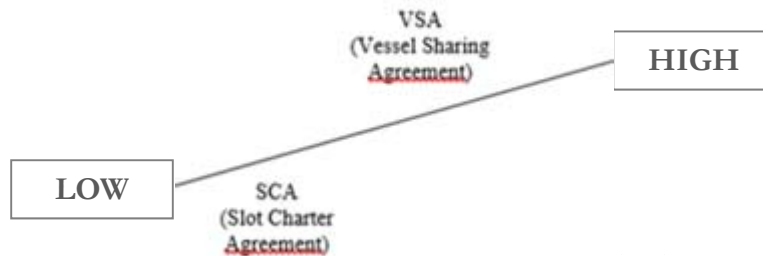
Cooperation among operators



Art. 90. For the purposes of Article 88 of this Law, a concentration act shall be carried out when:

- I - two (2) or more previously independent companies merge;
- II - one (1) or more companies acquire, directly or indirectly, by purchase or exchange of stocks, shares, bonds or securities convertible into stocks or assets, whether tangible or intangible, by contract or by any other means or way, the control or parts of one or more companies;
- III – one (1) or more companies incorporate one or more companies, or
- IV - two (2) or more companies enter into an associative contract, consortium or joint venture.

Level of cooperation among competitors by types of agreement



Cooperation	VSA	SCA
Frequency	Joint decision	Individual decision
Slots provision	Yes	Yes
Joint operation on the line	Yes	No
Selection of the ports	Joint decision	Individual decision
Selecion of terminals	Joint decision	Individual decision



Thank you