

Carrier networks 2025: **Asia - Europe**



Carrier alliances are operational partnerships between shipping lines that allow them to share vessels, terminals, and resources, creating more efficient and reliable networks.

However, in 2025, there will be further shakeups that will impact the market. Total services across all trade lanes will grow from 85 in 2024 to 114 in 2025, reflecting substantial expansion. On Asia - North Europe, services will rise from 17 to 24.

Evolution of shipping alliance services

	Asia - Europe
2M	5
Ocean Alliance	6
The Alliance	6
TOTAL 2024	17
MSC	7
Gemini	4
Ocean Alliance	6
Premier Alliance	7
TOTAL 2025	24

As of February 2 2025, on the Asia - Europe trade, the Ocean Alliance holds the largest market share at 35%, followed by MSC at 23%. Gemini Cooperation closely trails with a market share of 21%, while the Premier Alliance accounts for 19%.

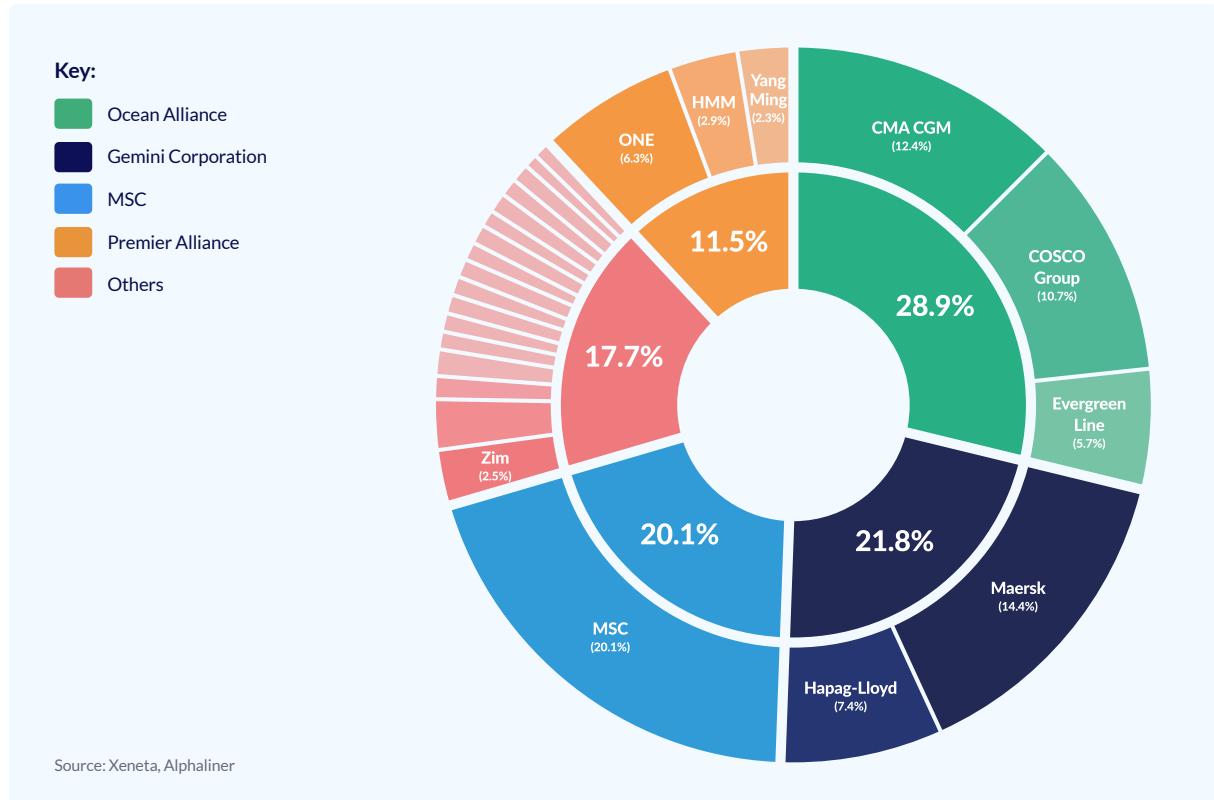


Major changes to Alliances in 2025

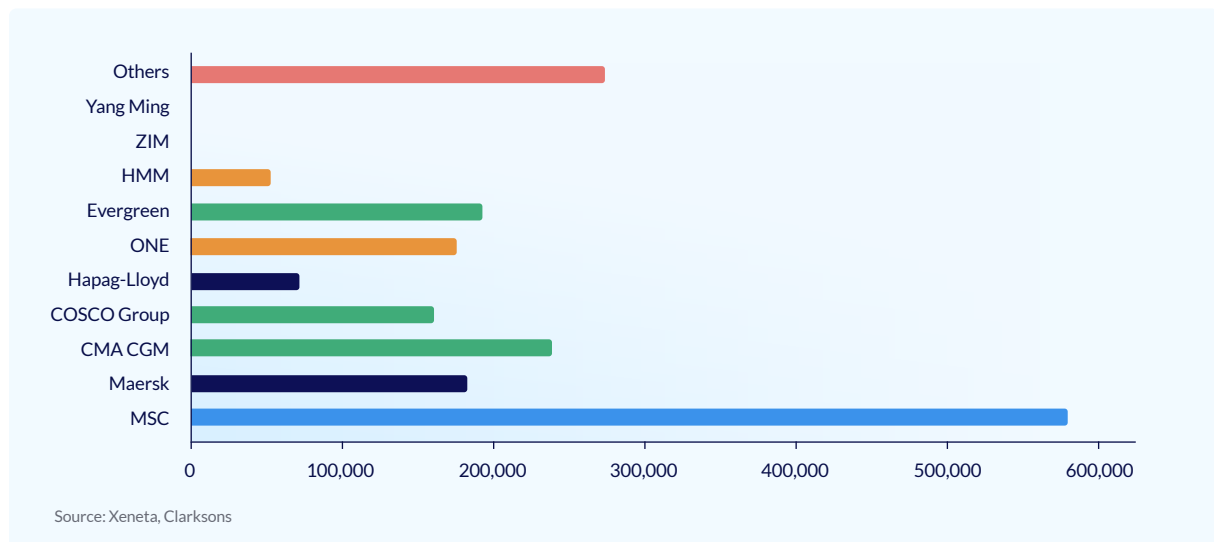


Future Container Shipping Alliances, as of 11 November, 2024

(Excluding: 2M. Including: Gemini, Premier)



Scheduled deliveries in 2025 by carrier



MSC

- MSC is positioning itself to operate independently with an extensive network of direct port-to-port services across Asia-Europe by February 2025.
- 191 direct port pairs, making MSC an attractive choice for shippers who value simple, broad coverage and direct shipping.



Gemini Cooperation (Maersk and Hapag Lloyd)

- This alliance is expected to focus on improving schedule reliability with a hub-and-spoke model designed to minimise direct port calls.
- While the number of loops Gemini offers may be fewer compared to other alliances, its goal is to achieve a 90% on-time service reliability.

Premier Alliance (ONE, Yang Ming, HMM)

- This is another key player in 2025, offering a range of Asia-Europe services, many in collaboration with MSC.
- Its strength lies in the lucrative Transpacific and Asia-Europe lanes, and it will maintain a robust service network through vessel-sharing agreements with MSC.
- The Premier Alliance members are set to offer six Asia-North Europe services, four of which will be operated in cooperation with MSC.
- This alliance has recently announced its inaugural sailing network for services across Asia-Europe, with six services from Week 6.

OCEAN Alliance (CMA CGM, COSCO, Evergreen, OOCL)

- The only alliance not to suffer a change. This alliance focuses on stability of product, avoiding risks and continues to rely on strong performance.

Per country analysis:

UK

34 days transit time can be achieved into each of the 3 main ports by the carriers

Southampton

Premier and MSC

Felixstowe

Ocean Alliance and MSC

London Gateway

Gemini

Southampton is best served by FP2, Premier and Griffin, MSC.

FP2, Premier and Griffin, MSC

(SHANGHAI - NINGBO - YANTIAN - SINGAPORE - SOUTHAMPTON - ANTWERP - SINGAPORE - LAEM CHABANG - VUNG TAU - HAIPHONG - YANTIAN)

- Direct corridor to Southampton from major Asian ports (Shanghai, Ningbo, Yantian) with fast transit times
- This is a slot sharing agreement between Premier and MSC, with vessels operated by the Premier Alliance

Felixstowe is served equally by FAL5, Ocean Alliance, as well as the Albatross and Britannia, MSC.

FAL 5, Ocean Alliance

(QINGDAO - SHANGHAI - NINGBO - XIAMEN - YANTIAN - SINGAPORE - FELIXSTOWE)

- Weekly frequency, 15 vessel fleets, 12 ports of call, 105 days duration
- Central & South China coverage
- Best in class service to Felixstowe (first Europe call)

Albatros, MSC

(XINGANG - DALIAN - GWANGYANG - NINGBO - SHANGHAI - YANTIAN - SINGAPORE - FELIXSTOWE - LONDON GATEWAY - BREMERHAVEN - GDANSK - BREMERHAVEN - FELIXSTOWE - SINGAPORE - VUNG TAU)

- Direct services from China and South Korea to the UK, including a unique corridor from Gwangyang to North Europe

Britannia, MSC

(SHANGHAI - NINGBO - YANTIAN - VUNG TAU - SINGAPORE - COLOMBO - FELIXSTOWE - ANTWERP - GDANSK - GDYNIA - KLAIPEDA - ANTWERP - LONDON GATEWAY - MUNDRA - SINGAPORE)

- Competitive transit times from Vung Tau to main European destinations

UK - Continued

London Gateway is best served by the Gemini Cooperation

AE5, Maersk and Hapag -Lloyd/NE4, Hapag-Lloyd

(QINGDAO - YANTIAN - TANJUNG PELAPAS - LONDON GATEWAY - BREMERHAVEN - HAMBURG - ROTTERDAM)

- Key service from Central and South China to North Europe via the Cape of Good Hope
- Additional gateway option for Hamburg (DE) and Felixstowe (UK) next to AE1/NE2

AE3, Maersk /NE3, Hapag-Lloyd

(SHANGHAI - NINGBO - TANJUNG PELAPAS - ALGECIRAS - LONDON GATEWAY - ROTTERDAM)

- Key service from Central China to South and North Europe via the Cape of Good Hope

Transit times and services per port pair for the UK

Port of Loading	Port of Discharge	Ocean Alliance Transit time in days	Ocean Alliance Service	Premier Transit time in days	Premier Service	MSC Transit time in days	MSC Service	Gemini Transit time in days	Gemini Service
Yantian	Southampton	36-37	FAL1	34-70	FE4/FE6	34	GRIFFIN	43-57	AE1
Shanghai	Southampton	39-40	FAL1	40-50	FE4	40-50	GRIFFIN	48-62	AE1
Ningbo	Southampton	40-42	FAL1	37-41	FE4	37	GRIFFIN	48-61	AE1
Qingdao	Southampton	47-50	FAL1	45-69	FE3	56	CONDOR	51-65	AE1
Xiamen	Southampton	40-41	FAL1	47	FE6	47	CONDOR	49	AE1
Yantian	London Gateway	40-44	NEWMO	50	FE4	37	ALBATROS	34	AE5
Shanghai	London Gateway	40-63	NEWMO	54	FE4	41-58	ALBATROS	41	AE3
Ningbo	London Gateway	40-61	NEWMO	60	FE4	43-60	ALBATROS	38	AE3
Qingdao	London Gateway	40-66	NEWMO	62-67	FE4	54-67	ALBATROS	39	AE5
Xiamen	London Gateway	43-44	NEWMO	n/a	n/a	39	ALBATROS	37	AE5
Yantian	Felixstowe	34-35	FAL5	n/a	n/a	34-36	ALBATROS	n/a	n/a
Shanghai	Felixstowe	40-41	FAL5	n/a	n/a	38-40	ALBATROS	n/a	n/a
Ningbo	Felixstowe	38-39	FAL5	n/a	n/a	39-40	BRITANNIA	n/a	n/a
Qingdao	Felixstowe	43-45	FAL5	n/a	n/a	51	BRITANNIA	n/a	n/a
Xiamen	Felixstowe	35-36	FAL5	n/a	n/a	36-43	ALBATROS	n/a	n/a

Key:

- Direct
- Transshipment
- Fastest transit times

Per country analysis:
Netherlands

Strong performance from the Ocean Alliance on this market

FAL 2, CMA CGM

(TIANJIN XINGANG - DALIAN - QINGDAO - SHANGHAI - NINGBO - SINGAPORE - ROTTERDAM - EastBound ROTTERDAM - HAMBURG - ANTWERP)

- Weekly frequency, 14 vessel fleets, 10 ports of call, 98 days duration
- Dedicated North China with unique Dalian call & Central China
- Fast transit time to Rotterdam

FAL 6, CMA CGM

(KAOHSIUNG - QINGDAO - SHANGHAI - NINGBO - TAIPEI - YANTIAN - SINGAPORE - ROTTERDAM - EastBound ROTTERDAM - FELIXSTOWE - HAMBURG)

- Weekly frequency, 14 vessel fleets, 13 ports of call, 98 days duration
- Exhaustive China coverage
- Taiwan direct calls
- Fast transit time to Rotterdam



Transit times and services per port pair for the Netherlands

Port of Loading	Port of Discharge	Ocean Alliance Transit time in days	Ocean Alliance Service	Premier Transit time in days	Premier Service	MSC Transit time in days	MSC Service	Gemini Transit time in days	Gemini Service
Yantian	Rotterdam	31-35	FAL6	38-56	FE4/FE6	38-44	SWAN-SENTOSA	33	AE1
Shanghai	Rotterdam	37-41	FAL2	40-52	FE4	42-50	CONDOR	38	AE1
Ningbo	Rotterdam	35-39	FAL2	42-52	FE4	43-52	SILK	37	AE1
Qingdao	Rotterdam	39-46	FAL2	48-59	FE3	48-59	CONDOR	41-48	AE1
Xiamen	Rotterdam	38-42	FAL2	40	FE6	39-40	CONDOR	39	AE1

Key:

- Direct
- Transshipment
- Fastest transit times

Per country analysis:

Poland

Strong performance from the Ocean Alliance on this market

FAL 5, CMA CGM

(QINGDAO - SHANGHAI - NINGBO - XIAMEN - YANTIAN - SINGAPORE - FELIXSTOWE - EastBound FELIXSTOWE - ZEEBRUGGE - GDANSK - WILHELMSHAVEN)

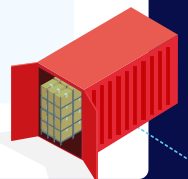
- Weekly frequency, 15 vessel fleets, 12 ports of call, 105 days duration
- Central & South China coverage
- Direct & best in class call to Gdansk

Transit times and services per port pair for Poland

Port of Loading	Port of Discharge	Ocean Alliance Transit time in days	Ocean Alliance Service	Premier Transit time in days	Premier Service	MSC Transit time in days	MSC Service	Gemini Transit time in days	Gemini Service
Yantian	Gdansk/ Gdynia on Premier	41-43	FAL5	47-66	FE4	44-45	ALBATROS	48	AE5
Shanghai	Gdansk/ Gdynia on Premier	47	FAL5	51-58	FE4	48-49	ALBATROS	47	AE2
Ningbo	Gdansk/ Gdynia on Premier	46-48	FAL5	54-59	FE4	48-50	BRITANNIA	50	AE2
Qingdao	Gdansk/ Gdynia on Premier	51-56	FAL5	57-62	FE3	60	BRITANNIA	53	AE5
Xiamen	Gdansk/ Gdynia on Premier	43-46	FAL5	54	FE6	46-52	ALBATROS	48	AE2

Key:

- Direct
- Transshipment
- Fastest transit times



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