

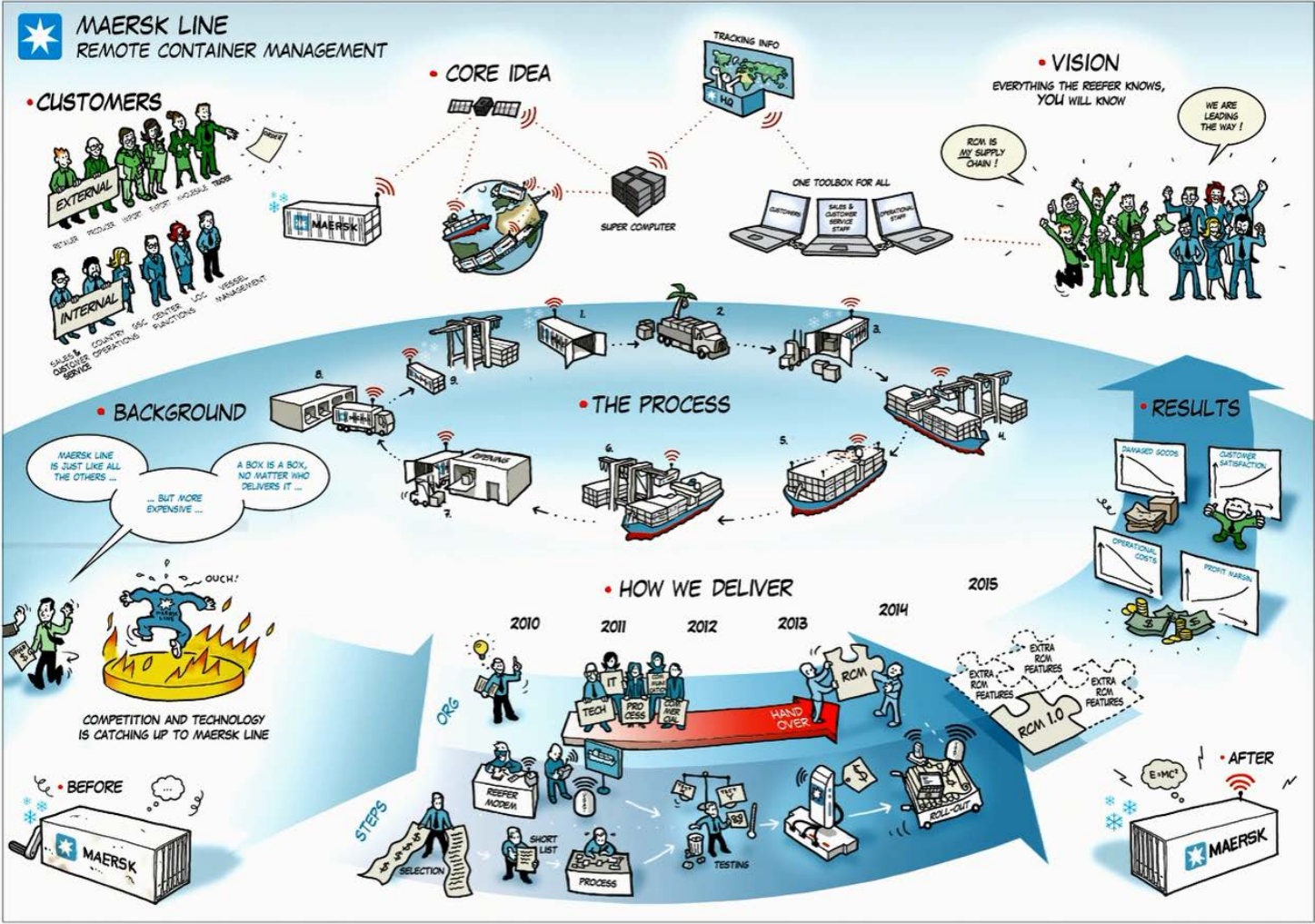
MAERSK LINE REEFER PRODUCTS AND SERVICES

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December 1, 2014

What is RCM?

How will this strengthen collaboration with you, Client?



In the “good” old days

1 CUSTOMER PROBLEM



2 “SOLVE” THE PROBLEM WITH GUT FEELING



3 BRING IN THE LAWYERS



4 SEMI-HAPPY CUSTOMER

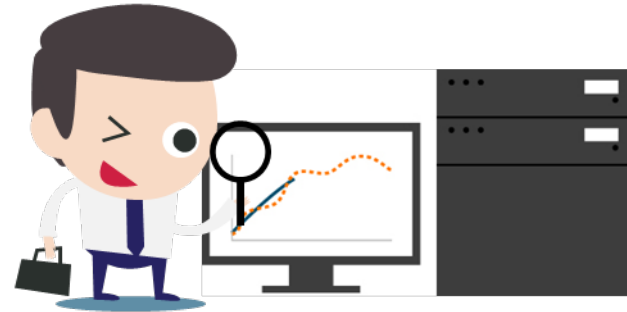


In the future...

1 CUSTOMER PROBLEM



2 ANALYZE THE DATA



3 IDENTIFY ROOT CAUSES



4 HAPPY CUSTOMER



MAERSK
LINE

Our Pledge...



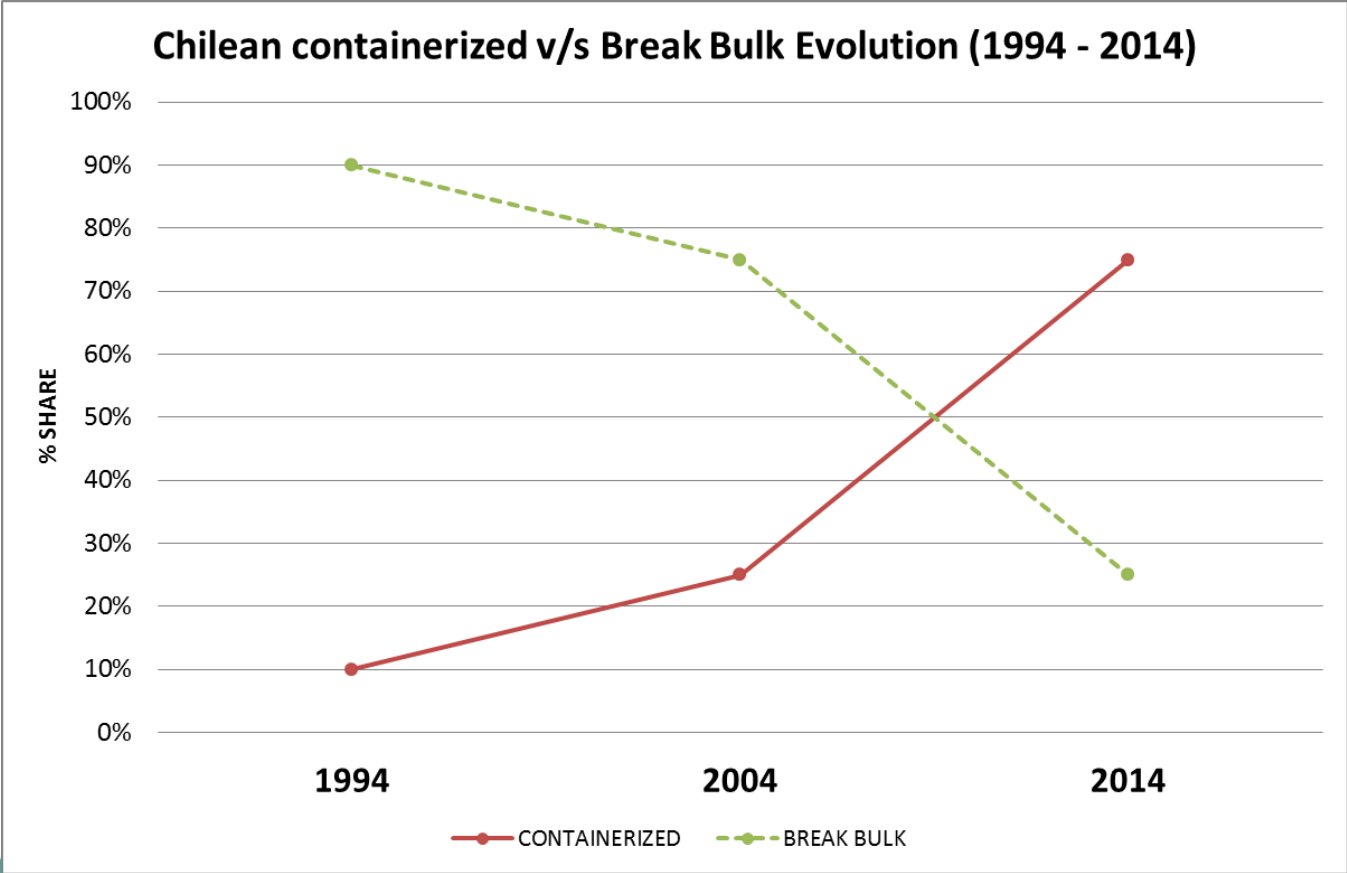
1 SPEAK WITH DATA

2 TOGETHER IMPROVE THE COLD CHAIN AND QUALITY OF THE FRUIT

3 INCREASE TRANSPARENCY

4 THINKING – INSIDE THE BOX

In 20 years, The Market has embraced containerization



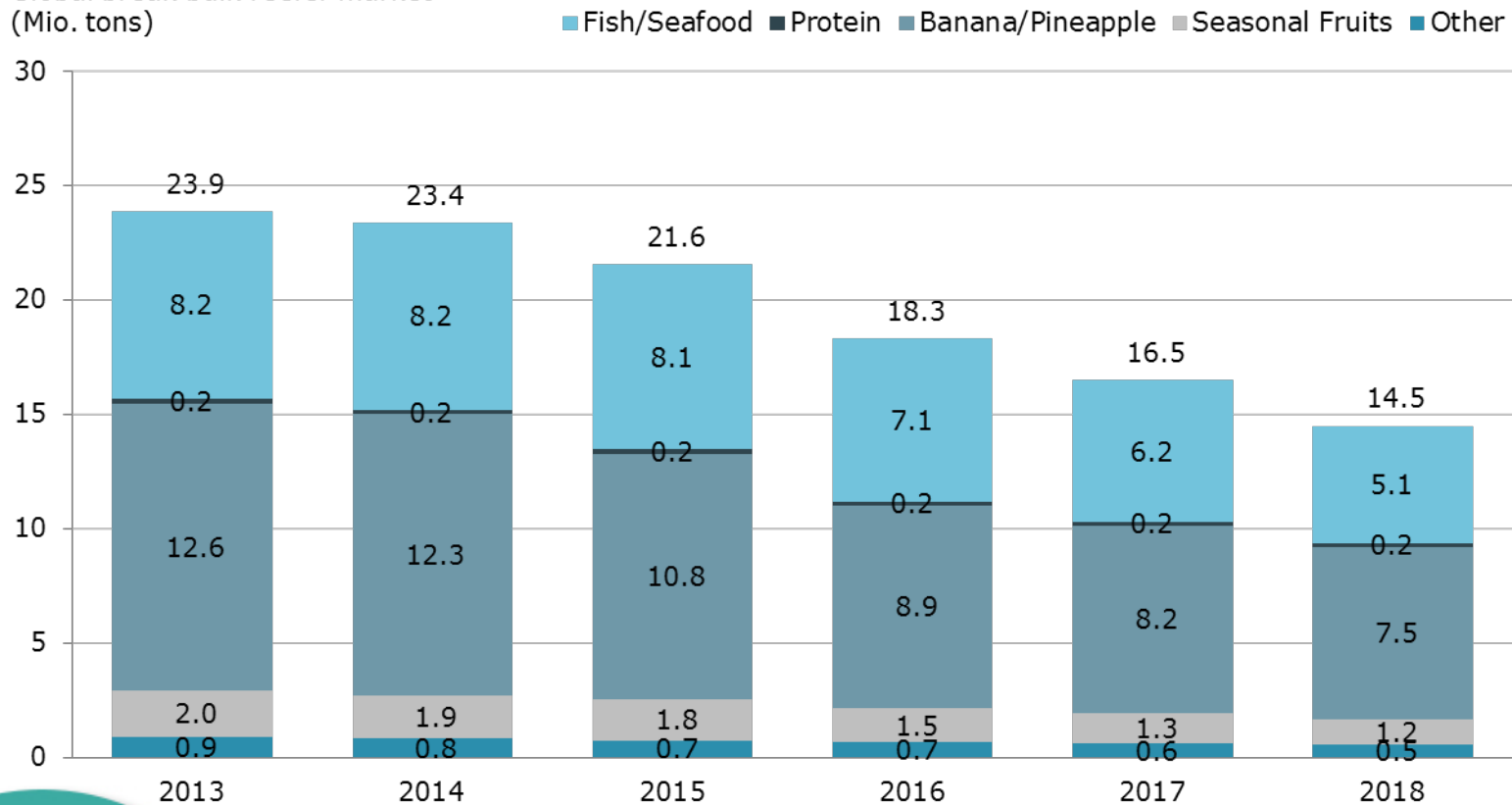
Note: *Global Containerized share of 2014 is 78%

Source: Lloyd's list, Maersk Line calculations



Conversion of +/- 400.000 FFE from breakbulk to containers..

Global break bulk reefer market
(Mio. tons)



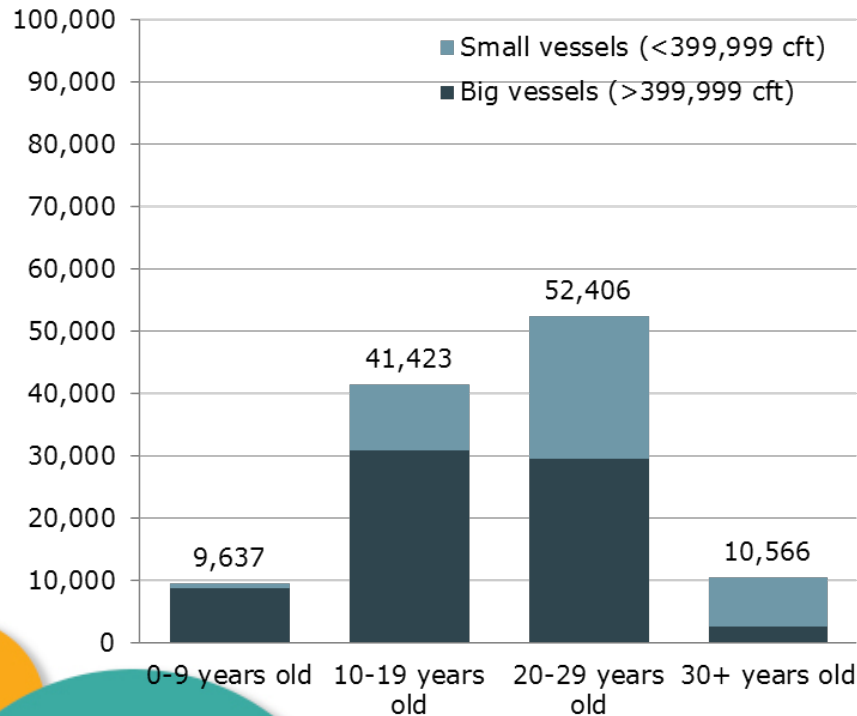
Note: The expected conversion per segment is in line with the scrapping assumptions for the different bbk vessel classes

Source: Maersk Line calculations

High age of remaining breakbulk carriers will push for further scrapping

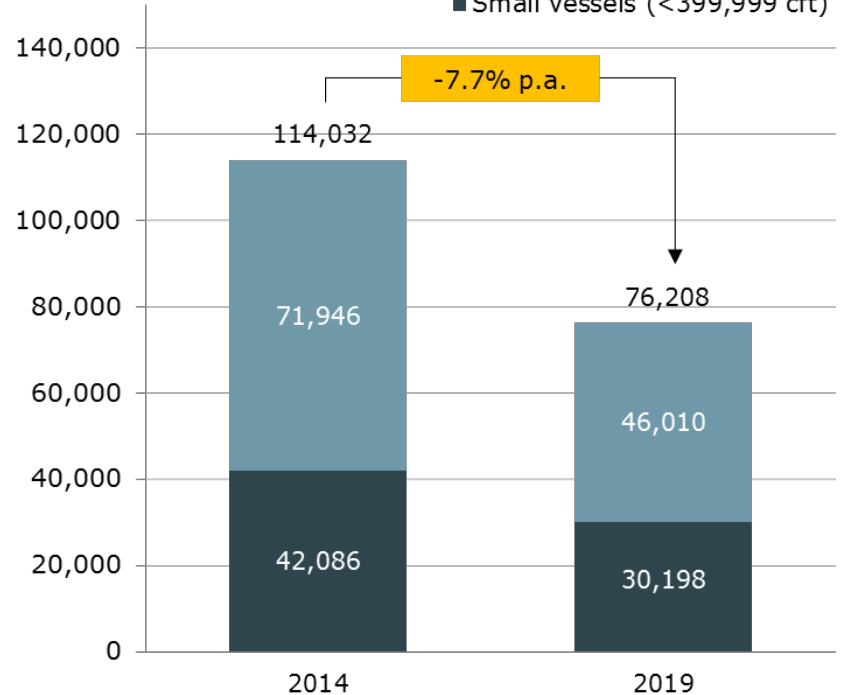
Since 2011 no new bbk vessels have been ordered and 55% of today's capacity is 20+ years old

2014 Reefer bbk fleet size (Start of year, FFE equivalents)



Around 33% of the current fleet is expected to be scrapped during the coming 5 years

Reefer break bulk fleet* (Start of year, FFE equivalents)



Note: *Scrapping forecast is based on the following assumed scrapping ages per vessel class: <200,000 cft = 37.5 years, 200-299,000 cft = 32.5 years, > 300,000 cft = 27 years

Source: Lloyd's list, Monaco Shipping, Maersk Line calculations

Panama Canal Expansion

And then what????

