

# Gemini Cooperation

## Cape Network

Trade Highlights and Service Maps



September 2024 | Hamburg



# Agenda

<b>A. Gemini Cooperation Network at a Glance</b>	<b>2</b>
B. Trade Overview Asia - Europe	7
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# Gemini Cooperation will enable us to offer significantly higher quality liner services to our customers

## Our value proposition ...



**RELIABILITY**



**CONNECTIVITY**



**SUSTAINABILITY**

## ... your benefit

- Enable >80% on-time delivery of your cargo
- Link all your relevant markets with fast and resilient transit times
- Accelerate the decarbonization of your supply chains

# We are prepared to deliver a reliable ocean transport: Aligned network ready for Suez Canal and Cape of Good Hope

- Due to the **on-going conflict in the Red Sea** a contingency **Cape Network** has been set-up
- As **like-minded partners** we have **jointly** and **efficiently** prepared options to ensure a smooth start of the Cooperation, with **flexibility** to adapt
- Both networks will **deliver on reliability and connectivity**, powered by the **innovative Hub-and-Spoke Network**
- Both networks ensure **broad port coverage** with an **efficient mainliner network, dedicated shuttle services** and complementing **feeder services**
- Decision** on final network option for launch of Gemini Cooperation **to be communicated in October**

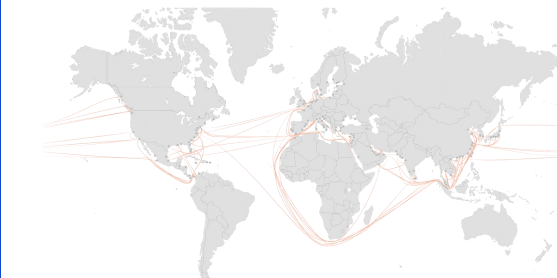
## Suez Network



57 SERVICES

~300  
VESSELS~3.4 TEU M  
CAPACITY

## Cape Network

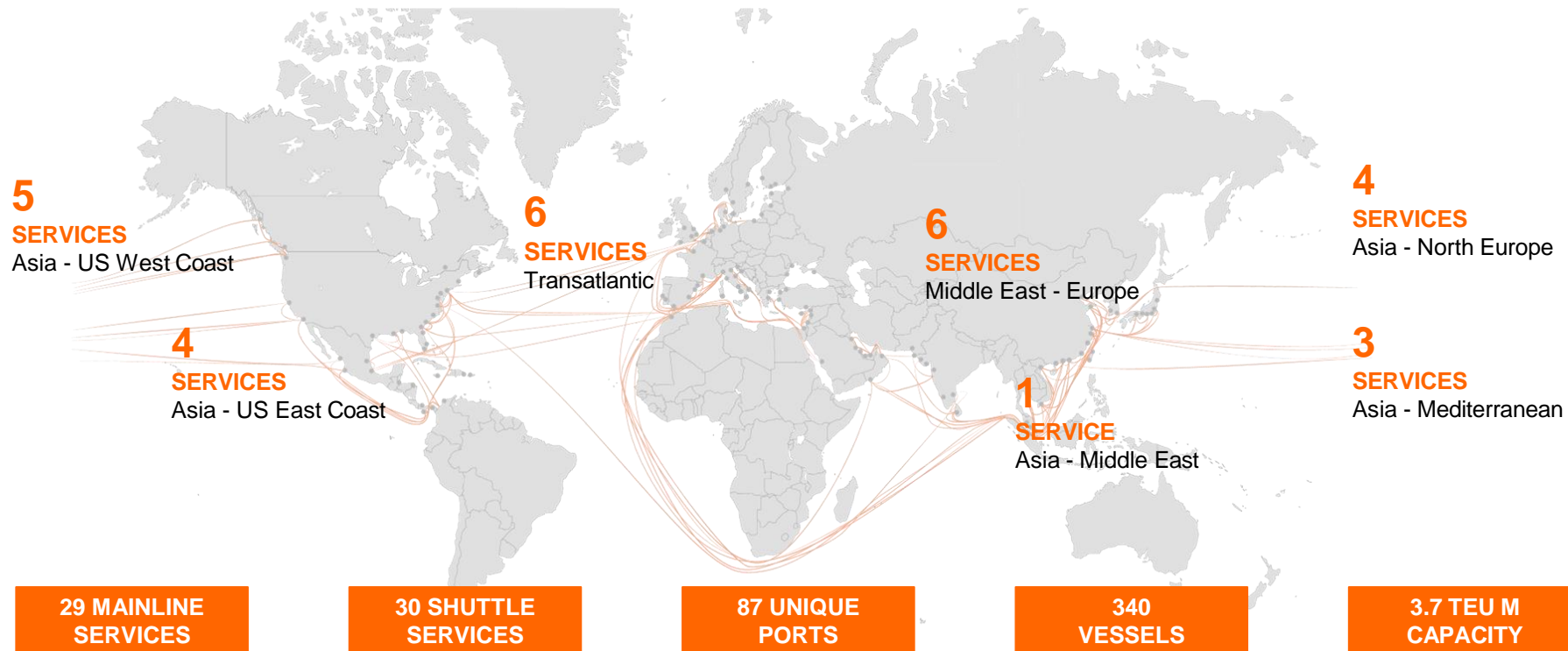


59 SERVICES

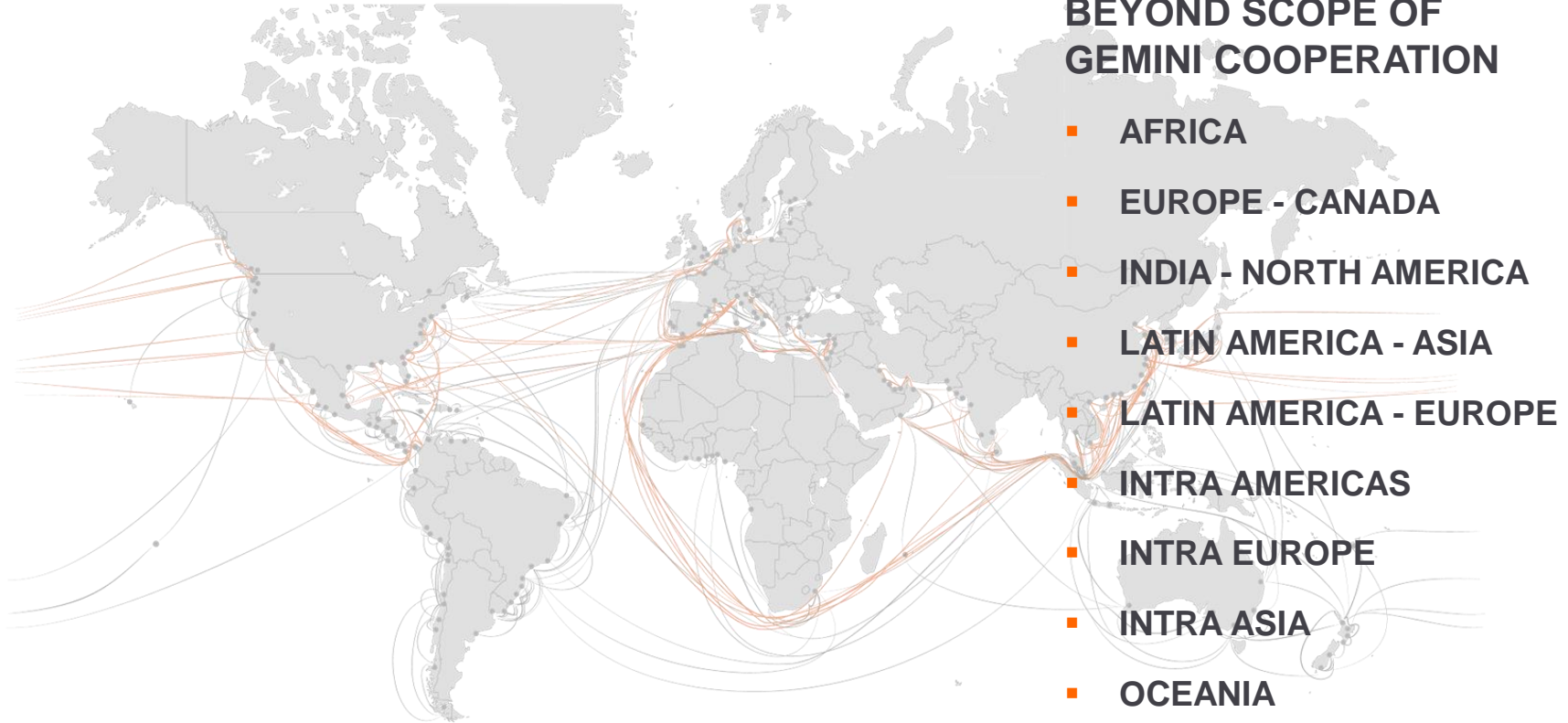
~340  
VESSELS~3.7 TEU M  
CAPACITY

Focus of this document

# The Cape Network of the Gemini Cooperation will consist of 29 mainline services and 30 dedicated shuttles ...



... and will be an integral part of Hapag-Lloyd's overall network of in total around 120 services globally



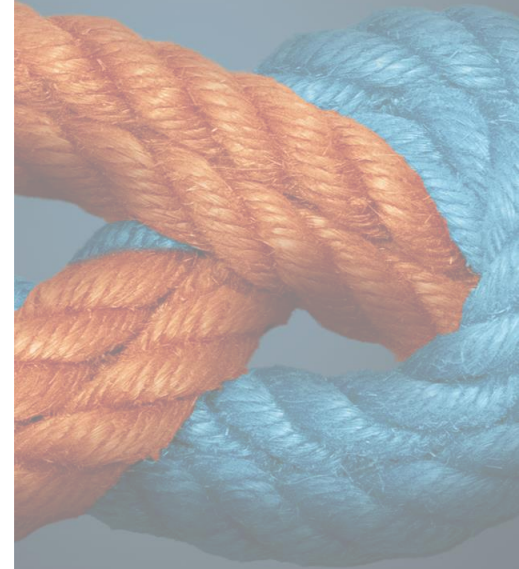
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## Asia - Europe

# Highlights of our Asia - Europe services

- Comprehensive Asia product with unrivalled reliability
- Delivering robust, on-time and weekly service schedules to our customers
- Benefit from a broad coverage of key markets through dedicated shuttle network in Asia and Europe offering seamless connections
- Enhanced coverage allowing further connections to key markets, e.g. Asia to Africa and Europe to Oceania
- Seamlessly connected shuttle network at mostly owned or controlled hubs
- New connections, e.g. from / to Malaysia and from / to Koper (as a gateway into Central Europe)





Asia - Europe

# Our Asia - Europe service in numbers

## KEY FACTS

7

# Services

97

# Vessels

8

Ø Calls per service

17.1 TTEU

Ø Vessel size

>28

ports covered in Europe

>19

ports covered in Asia

13

shuttles connecting hubs and European gateways

12

shuttles connecting hubs and Asian gateways



Go to shuttle network

## Asia - Europe

## Key features and improvements of our Asia - Europe service

## Transit times for selected port pairs (across Asia network)

*Preliminary and subject to final network design*

FROM	TO									
	Hamburg	Wilhelmshaven	Rotterdam	Felixstowe	Le Havre	Valencia	Barcelona	Istanbul	Genoa	Koper
Ningbo	42	44	39	38	40	37	40	47	38	50
Shanghai	44	41	40	41	43	39	43	47	39	46
Qingdao	44	44	40	42	44	41	45	51	42	50
Xiamen	43	43	39	38	41	41	45	50	41	50
Yantian	39	37	35	37	39	35	39	45	36	44
Tokyo	49	49	45	48	54	47	51	56	47	56
Busan	42	43	38	42	47	40	44	50	41	49
Laem Chabang	40	36	36	36	37	34	38	44	35	43
Haiphong	44	38	41	38	43	36	40	46	37	45
Vung Tau	42	36	37	35	40	33	37	43	34	42

**Disclaimer:** Transit time subject to change

**> 90%**  
Schedule  
reliability

**> 90%**  
of volume gets faster  
or remains same<sup>1)</sup>

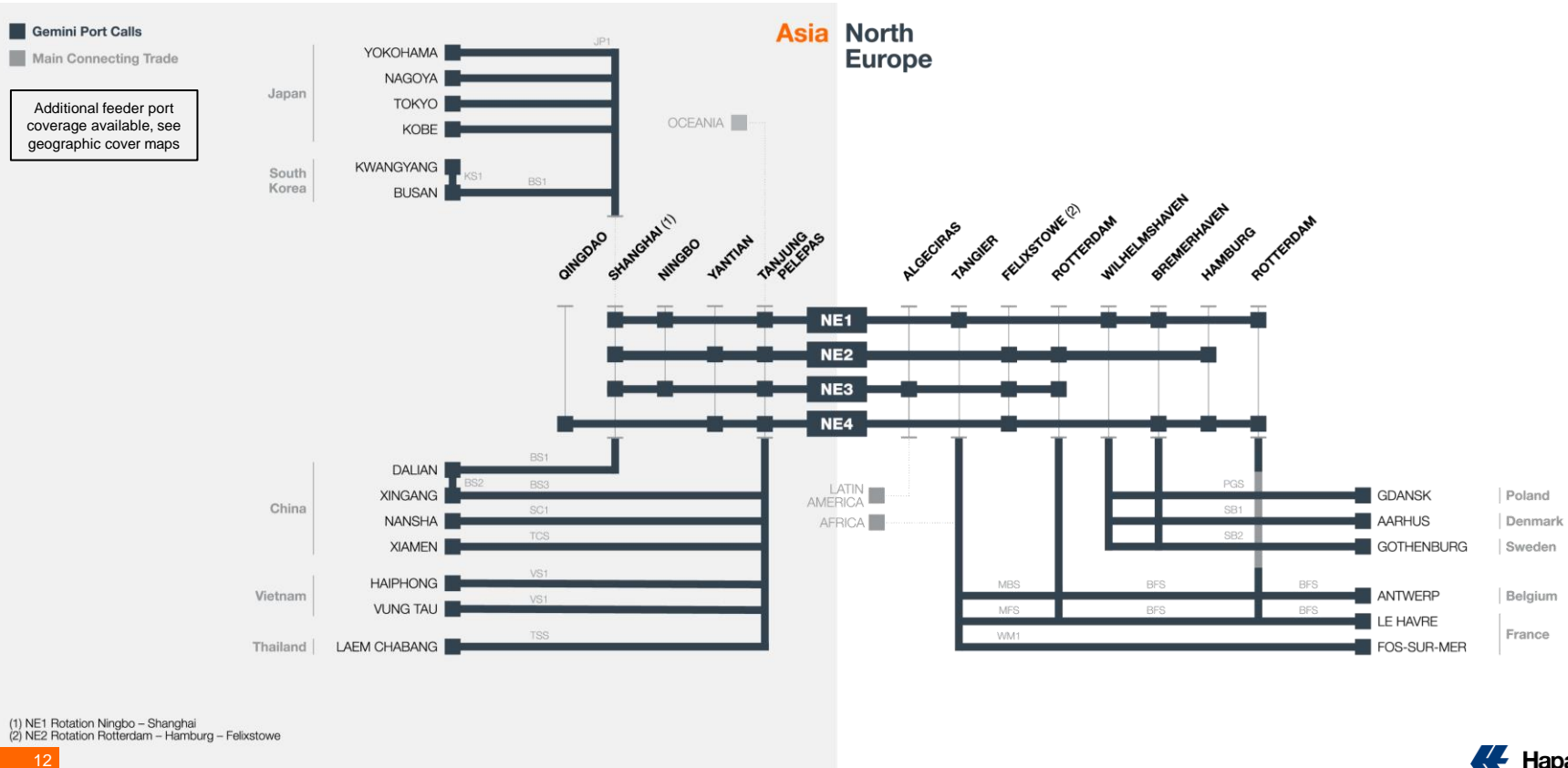
## Asia - Europe

## Port coverage on our Asia - North Europe services



# Asia - Europe

## Our Asia – North Europe services at a glance



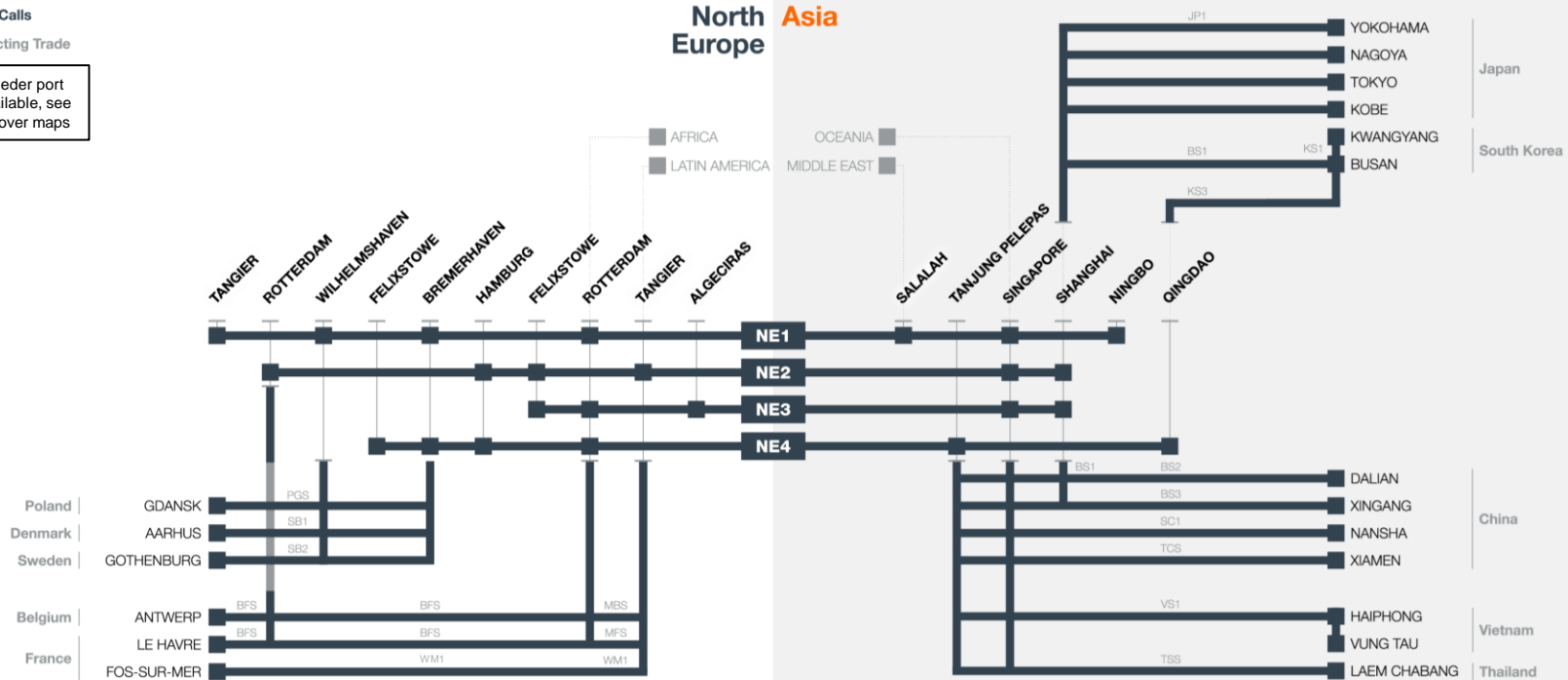
# Asia - Europe

## Our North Europe – Asia services at a glance

■ Gemini Port Calls

■ Main Connecting Trade

Additional feeder port coverage available, see geographic cover maps



## Asia - Europe

## Service Profile NE1



## KEY SERVICE VALUE PROPOSITION

- Key service from Central China to North Europe via the Cape of Good Hope through Tanger (MA)
- Eastbound service from Germany, Scandinavia/Baltic to Central China with connections to Southeast Asia and Oceania
- Serving the markets from North and South Europe to the Middle East with a direct connection to Salalah (OM)

## IMPORTANT CONNECTIONS

- Shuttles via Tanger (MA) connect to the Mediterranean
- Shuttles via Bremerhaven (DE) and Wilhelmshaven (DE) connect to Scandinavia and Poland
- Shuttles via Rotterdam (NL) connect to Le Havre (FR)
- Shuttles via Shanghai (CN) connect to Korea and Japan
- Shuttles via Tanjung Pelepas (MY) for Southeast Asian, South China, Bohai Sea and Oceania cargo
- Salalah (OM) to connect the Persian Gulf and Pakistan

## Asia - Europe

## Service Profile NE2



## KEY SERVICE VALUE PROPOSITION

- Key service to connect Hamburg (DE) as additional gateway from Central and South China to North Europe via the Cape of Good Hope
- Eastbound service with connection from Felixstowe (UK) to Central China, Southeast Asia and Oceania

## IMPORTANT CONNECTIONS

- Shuttles via Rotterdam (NL) connect to Antwerp (BE) and Le Havre (FR)
- Shuttles via Shanghai (CN) connect to Korea and Japan
- Shuttles via Tanjung Pelepas (MY) for Southeast Asian, South China, Bohai Sea and Oceania cargo
- Connection via Tangier (MA) to the Mediterranean

## Asia - Europe

## Service Profile NE3



## KEY SERVICE VALUE PROPOSITION

- Key service from Central China to South and North Europe via the Cape of Good Hope
- Eastbound service from the Netherlands to Central China, Southeast Asia and Oceania

## IMPORTANT CONNECTIONS

- Shuttles from Rotterdam (NL) to serve cargo from and to Antwerp (BE) and Le Havre (FR)
- Shuttles via Shanghai (CN) for Korea and Japan
- Shuttles via Tanjung Pelepas (MY) for Southeast Asian, South China, Bohai Sea and Oceania cargo
- Connection via Tangier (MA) to the Mediterranean



## Asia - Europe

# Service Profile NE4



### KEY SERVICE VALUE PROPOSITION

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

### IMPORTANT CONNECTIONS

- Shuttles via Bremerhaven (DE) to connect to Scandinavia and Poland
- Shuttles via Rotterdam (NL) to connect Antwerp (BE) and Le Havre (FR)
- Shuttles via Tanjung Pelepas (MY) for Southeast Asian, South China, Bohai Sea and Oceania cargo

## Asia - Europe

## Port coverage on our Asia - South Europe services



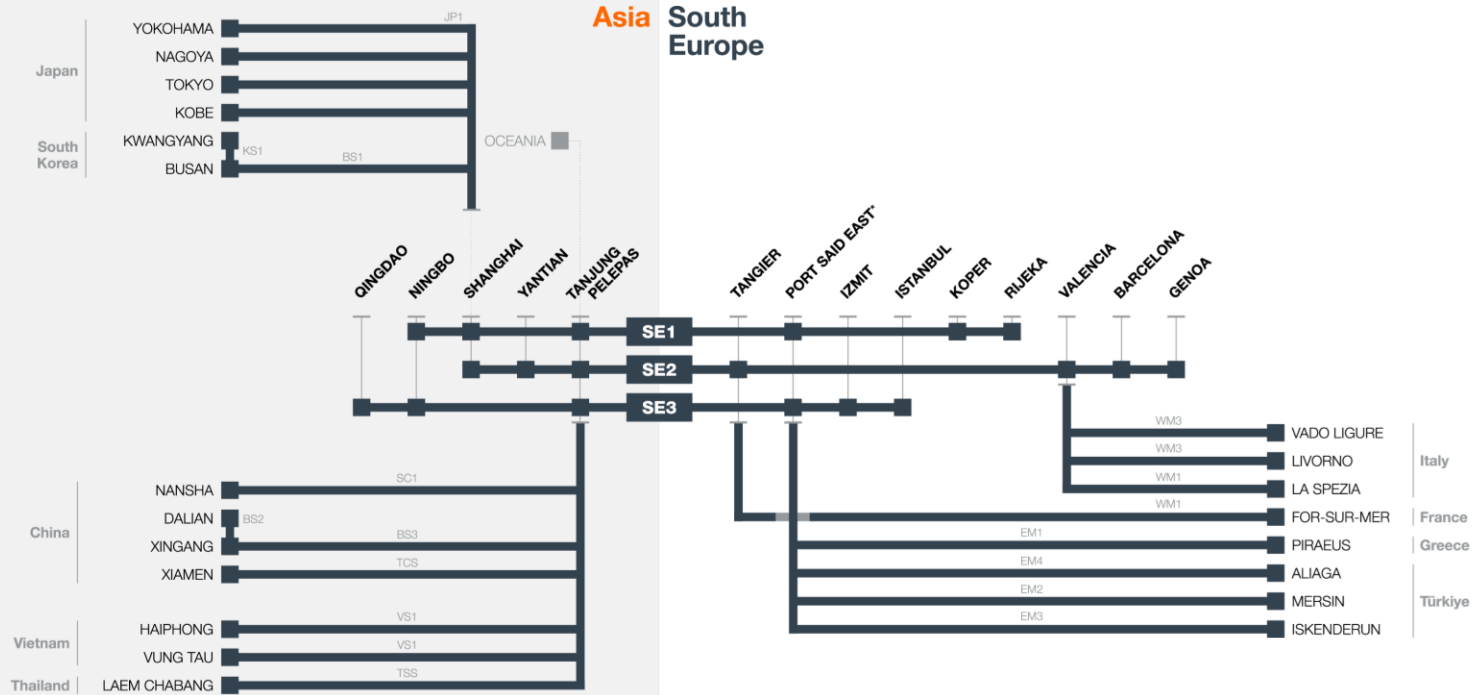
# Asia - Europe

## Our Asia – South Europe services at a glance

■ Gemini Port Calls

■ Main Connecting Trade

Additional feeder port coverage available, see geographic cover maps



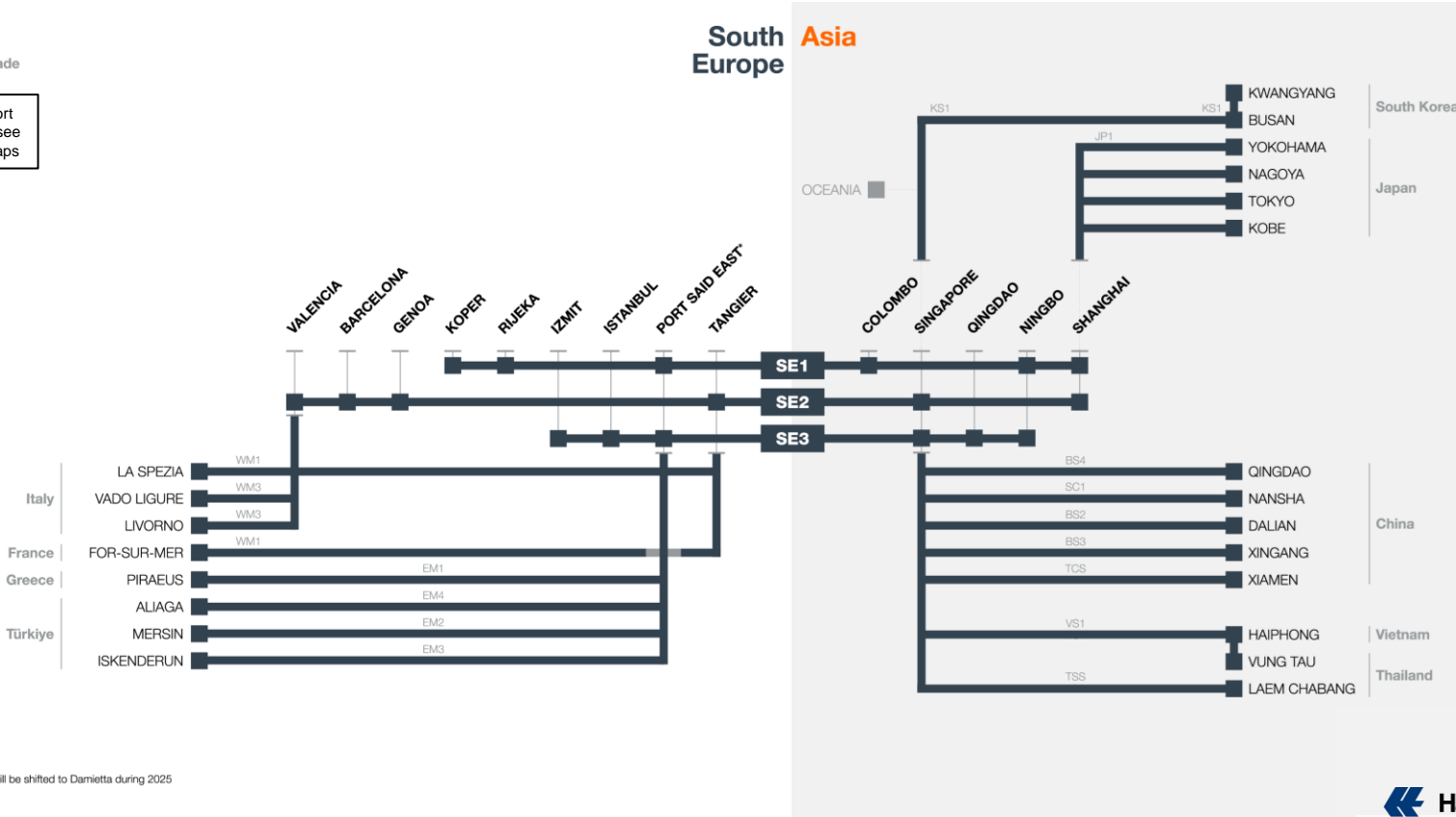
\*Certain Port Said East EB calls will be shifted to Damietta during 2025

# Asia - Europe

## Our South Europe – Asia services at a glance

Gemini Port Calls  
 Main Connecting Trade

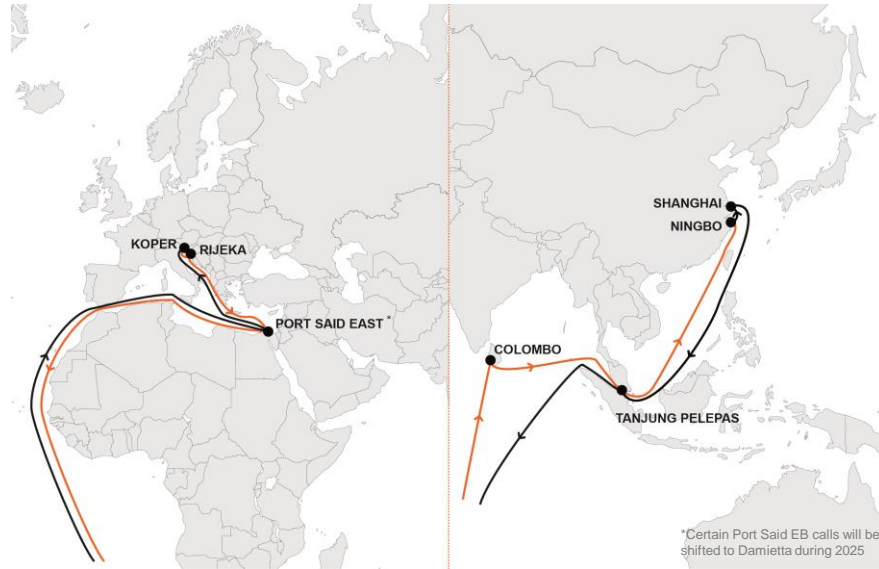
Additional feeder port coverage available, see geographic cover maps



\*Certain Port Said East EB calls will be shifted to Damietta during 2025

## Asia - Europe

## Service Profile SE1



## KEY SERVICE VALUE PROPOSITION

- Key service from Koper (SI) and Rijeka (HR) as gateways to Central European markets from Central China via the Cape of Good Hope
- Serving the Indian Subcontinent and Middle East with direct Connections to Colombo (LK) and Port Said East (EG)

## IMPORTANT CONNECTIONS

- Shuttles via Shanghai (CN) for Korea and Japan
- Shuttles via Tanjung Pelepas (MY) for Southeast Asian, South China, Bohai Sea and Oceania cargo
- Port Said East (EG) enables fast and efficient transit from and to Türkiye, Greece, the Black and Red Sea
- Connection via Colombo (LK) to the Indian subcontinent

## Asia - Europe

# Service Profile SE2



### KEY SERVICE VALUE PROPOSITION

- Key service from South Europe as gateway to European markets from Central and South China
- Eastbound service to export markets from Spain and Italy to Central and South China, Southeast Asia and Oceania via Tanjung Pelepas (MY) or Singapore (SG)

### IMPORTANT CONNECTIONS

- Shuttles via Shanghai (CN) for Korea and Japan
- Shuttles via Tanjung Pelepas (MY) for Southeast Asian, South China, Bohai Sea and Oceania cargo
- Tangier (MA) and Valencia (ES) connect to the remaining Mediterranean

## Asia - Europe

## Service Profile SE3



## KEY SERVICE VALUE PROPOSITION

- Key service from Türkiye as gateway to Europe from Qingdao (CN) and Ningbo (CN)
- Serving the markets from the Middle East with direct connections to Port Said
- Connects Asia with the markets of the Middle East

## IMPORTANT CONNECTIONS

- Shuttles via Tanjung Pelepas (MY) for Southeast Asian, South China, Bohai Sea and Oceania cargo
- Port Said East (EG) enables fast and efficient transit from and to Italy, Greece, the Black and Red Sea

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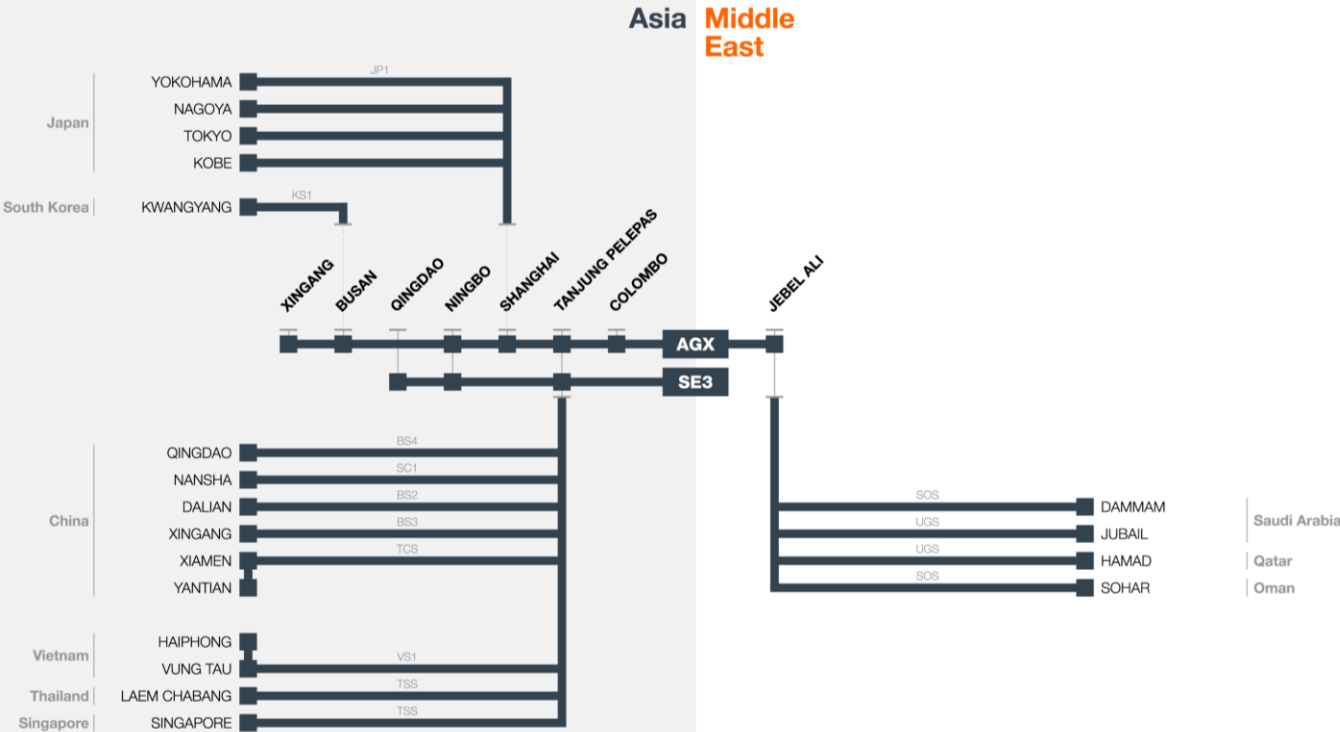


# Middle East

## Our Asia – Middle East services at a glance

Gemini Port Calls  
 Main Connecting Trade

Additional feeder port coverage available, see geographic cover maps

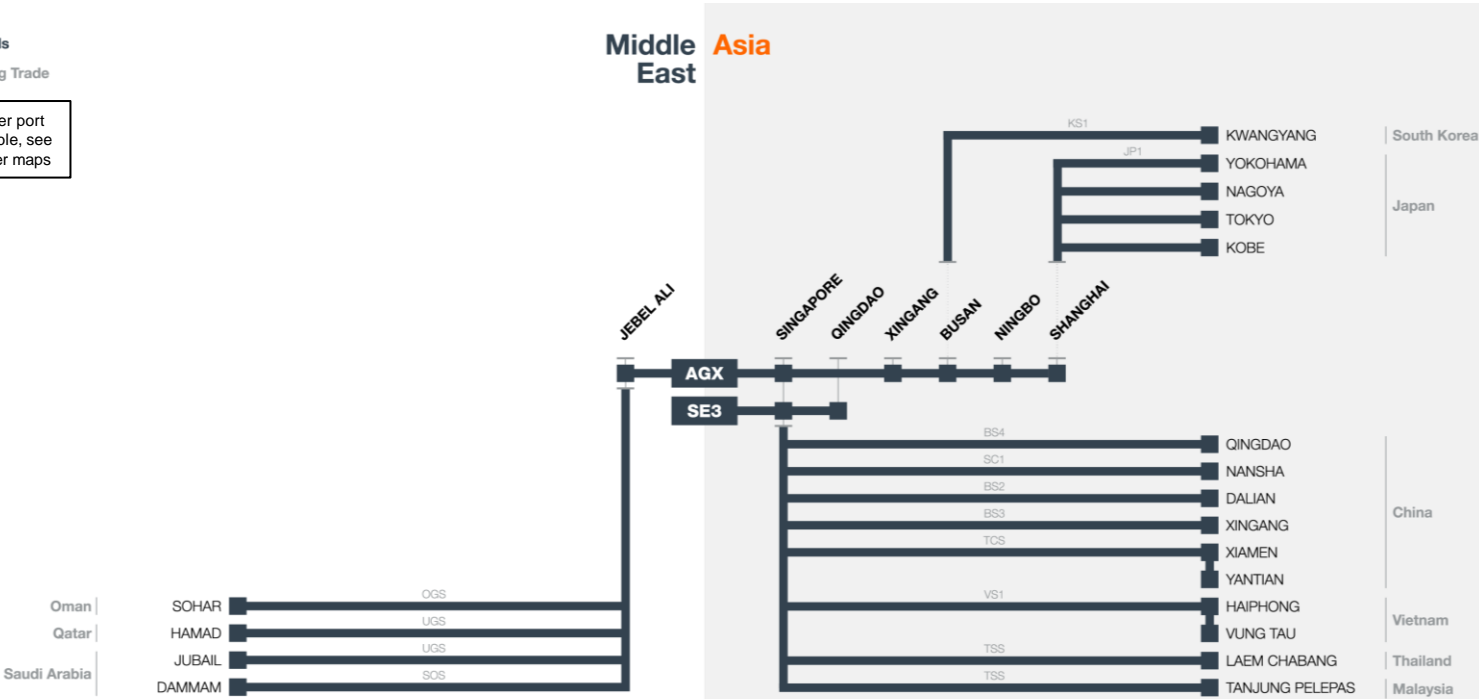


# Middle East

## Our Middle East – Asia services at a glance

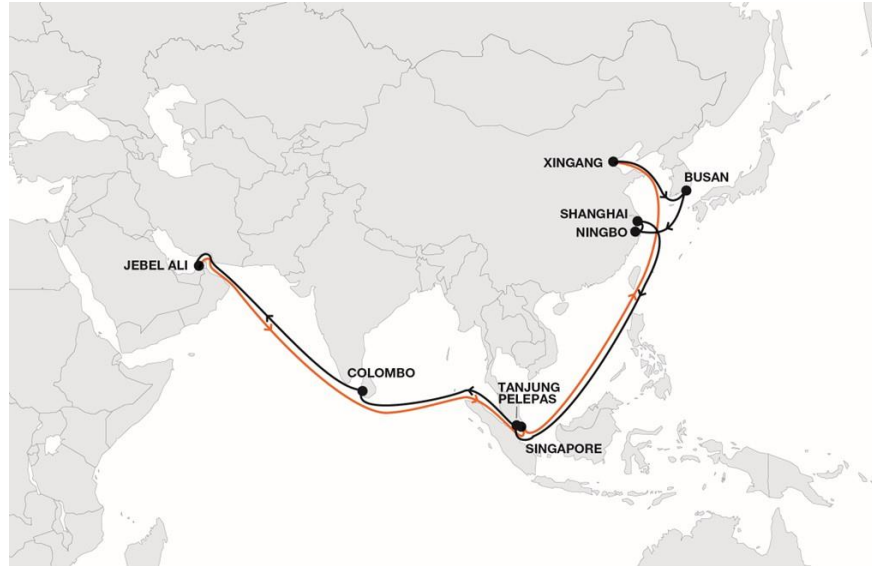
- Gemini Port Calls
- Main Connecting Trade

Additional feeder port coverage available, see geographic cover maps



## Asia-Middle East

## Service Profile AGX



## KEY SERVICE VALUE PROPOSITION

- Key service from Busan (KR), Xingang (CN), Shanghai (CN) and Ningbo (CN) to the Arabian Gulf
- Eastbound service from the Arabian Gulf to East Asia and Oceania via Tanjung Pelepas (MY) or Singapore (SG)

## IMPORTANT CONNECTIONS

- Shuttles via Jebel Ali (AE) into the Arabian Gulf and via Colombo (LK) into the Indian subcontinent
- Shuttles via Shanghai (CN) for Japanese and via Tanjung Pelepas (MY) for Southeast Asian, South China, Bohai Sea and Oceania cargo

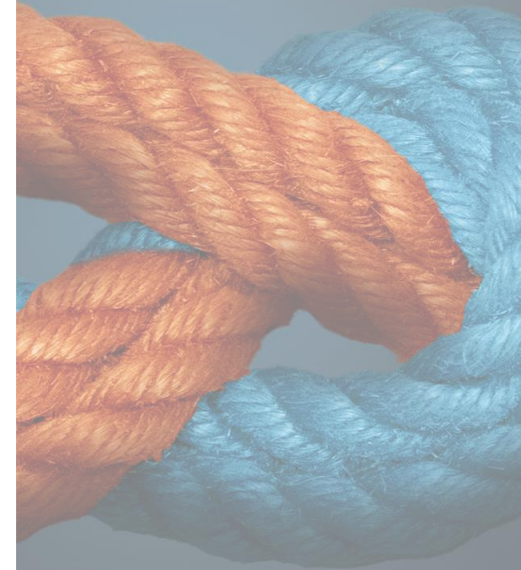
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## Atlantic

# Highlights of our Atlantic services

- Highly reliable and resilient Atlantic network with competitive transit times
- Strong product with excellent coverage connecting North and South Europe with the USA and Mexico
- Prime product out of North Europe to the US East and Gulf Coast
- Continued dedicated Mexico services out of North and South Europe
- Strong connectivity from the West Mediterranean via Tangier to the US East Coast
- Efficient US West Coast coverage via Cartagena
- Continued Atlantic Canada and East Mediterranean coverage through Hapag-Lloyd services outside of the Gemini Cooperation scope



Atlantic

# Our Atlantic service in numbers

## KEY FACTS

6

# Services

38

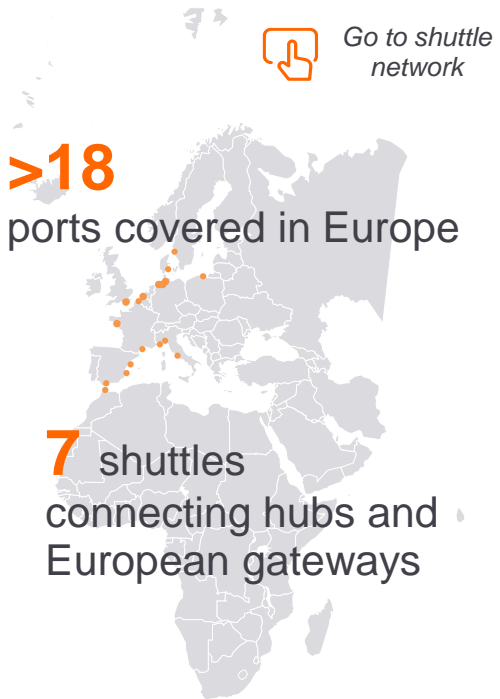
# Vessels

8

Ø Calls per service

6 TTEU

Ø Vessel size



## Atlantic

## Key features and improvements of our future Atlantic service

## Transit times for selected port pairs (across Atlantic network)

*Preliminary and subject to final network design*

FROM	TO								
	New York	Norfolk	Philadelphia	Baltimore	Charleston	Savannah	Houston	Veracruz	Altamira
Hamburg	13	9 <sup>2</sup>	16 <sup>3</sup>	21	13	17	16 <sup>2</sup>	15	18
Antwerp	18	15	24	23	18	21	22	19	21
Rotterdam	16	13	21	24	10	15	20	18	22
Southampton	17	20	24	23	16	21	27	22	26
Le Havre	15	22	32	22	16	21	30	23	25
Genoa	13	17	34	20	27	29	26	20	22
Livorno	19	25	35	24	31	36	28	20	22
Valencia	15	19	31	21	28	34	23	15	18
Barcelona	17	19	36	22	31	32	25	17	20
Fos-sur-Mer	14	19	35	21	28	29	31	24	26

> 90%  
Schedule  
reliability

> 85%  
of volume gets faster  
or remains same<sup>1)</sup>

**Disclaimer:** Transit time subject to change

Atlantic

# Port coverage on our North America - North Europe services



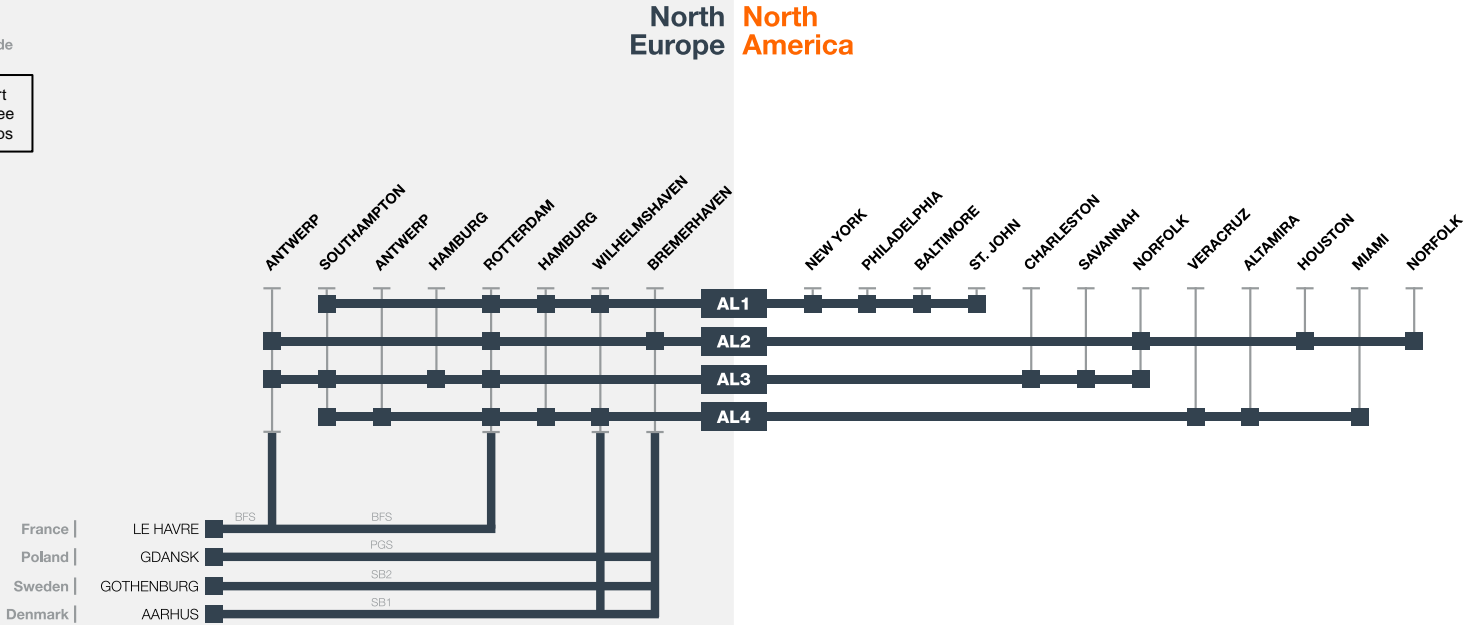


# Atlantic

## Our North Europe to North America services at a glance

- Gemini Port Calls
- Main Connecting Trade

Additional feeder port coverage available, see geographic cover maps



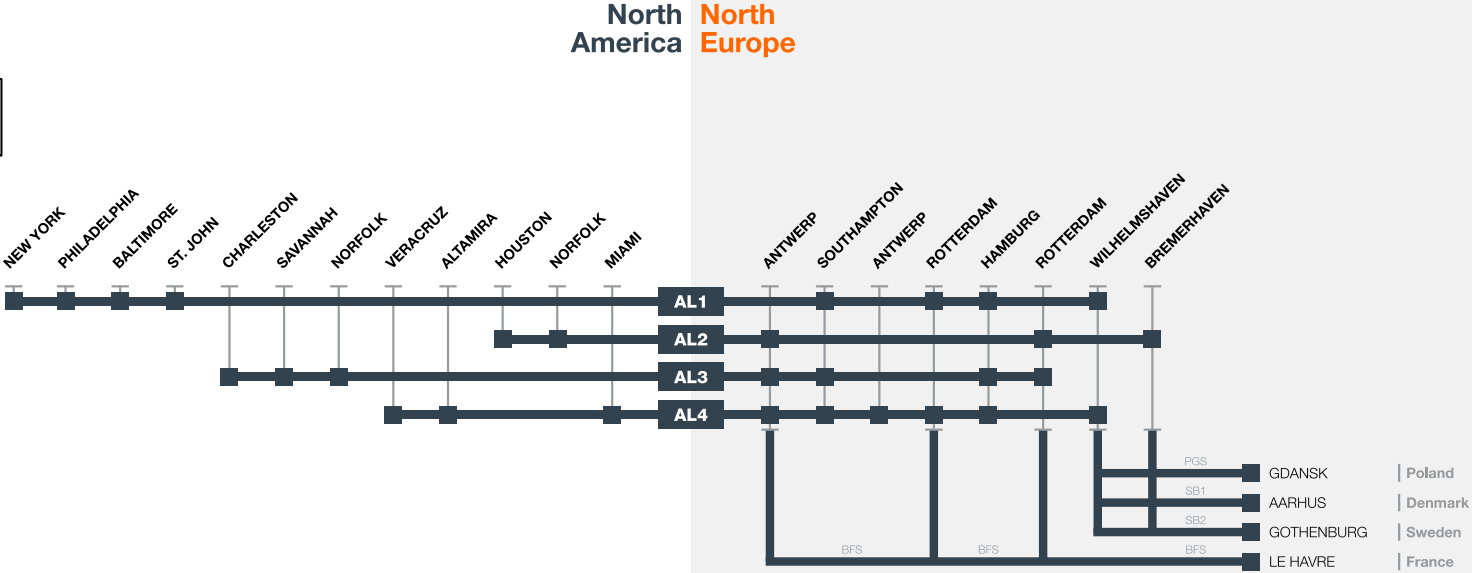
Baltic Shuttle ports can be connected to AL3 and AL4 service via feeder services in Hamburg | Miami & Los Angeles covered via Cartagena  
 (1) On AL4 first Wilhelmshaven and then Hamburg

# Atlantic

## Our North America to North Europe services at a glance

- Gemini Port Calls
- Main Connecting Trade

Additional feeder port coverage available, see geographic cover maps



Baltic Shuttle ports can be connected to AL3 and AL4 service via feeder services in Hamburg

## North Europe - North America

# Service Profile AL1



### KEY SERVICE VALUE PROPOSITION

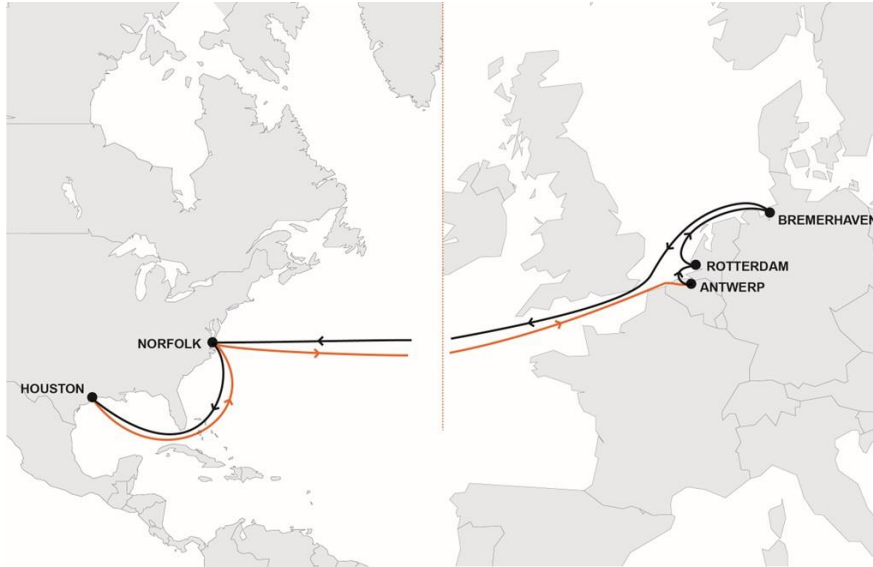
- Extended coverage of the US East Coast
- Prime product from Central Europe with two gateway options in Hamburg (DE) and Wilhelmshaven (DE) to New York (US)
- Fastest transit time from Wilhelmshaven (DE)
- Coverage of Philadelphia (US) and Baltimore (US)

### IMPORTANT CONNECTIONS

- Le Havre (FR) connected by dedicated shuttle via Rotterdam (NL) with connectivity westbound and eastbound
- Shuttles via Wilhelmshaven (DE) connect to Poland, Sweden and Denmark
- Comprehensive intermodal connections into US Midwest
- Scandinavian and Baltic markets covered via Wilhelmshaven (DE)

## North Europe - North America

# Service Profile AL2



### KEY SERVICE VALUE PROPOSITION

- Core service from Benelux and Germany non-stop to Norfolk (US) and Houston (US) as second port westbound

### IMPORTANT CONNECTIONS

- Le Havre (FR) connected by dedicated shuttle via Rotterdam (NL)
- Shuttles via Bremerhaven (DE) connect to Poland, Sweden and Denmark
- Additional Scandinavian and Baltic ports are covered via Bremerhaven (DE)

## North Europe - North America

# Service Profile AL3



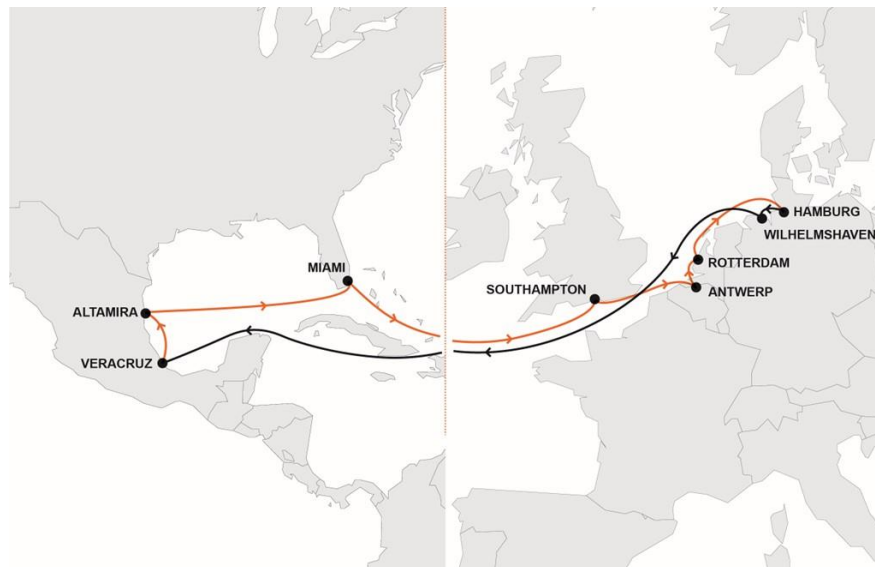
### KEY SERVICE VALUE PROPOSITION

- Concentrated coverage of the South Atlantic market
- Key service for connections from the UK, Germany and Benelux markets to Charleston (US)
- Coverage of the German and Benelux hinterland market eastbound and westbound with calls in both Antwerp (BE) and Rotterdam (NL)

### IMPORTANT CONNECTIONS

- Le Havre (FR) connected by dedicated shuttle via Rotterdam (NL)
- All Scandinavian and Baltic markets connected via Hamburg (DE) by a comprehensive network of feeders

## North Europe - North America

**Service Profile AL4****KEY SERVICE VALUE PROPOSITION**

- Core Mexico service without stopover in the US on westbound rotation, with key attributes like no U.S. AMS required
- Key service for connections from North Europe to Mexico and Miami (US) with no U.S. AMS required
- Prime eastbound service from Mexico and Miami (US) to the UK and Benelux markets

**IMPORTANT CONNECTIONS**

- Le Havre (FR) connected by dedicated shuttle via Rotterdam (NL)
- All Scandinavian and Baltic markets connected via Hamburg (DE) by a comprehensive network of feeders

# Atlantic

## Port coverage on our North America - South Europe services

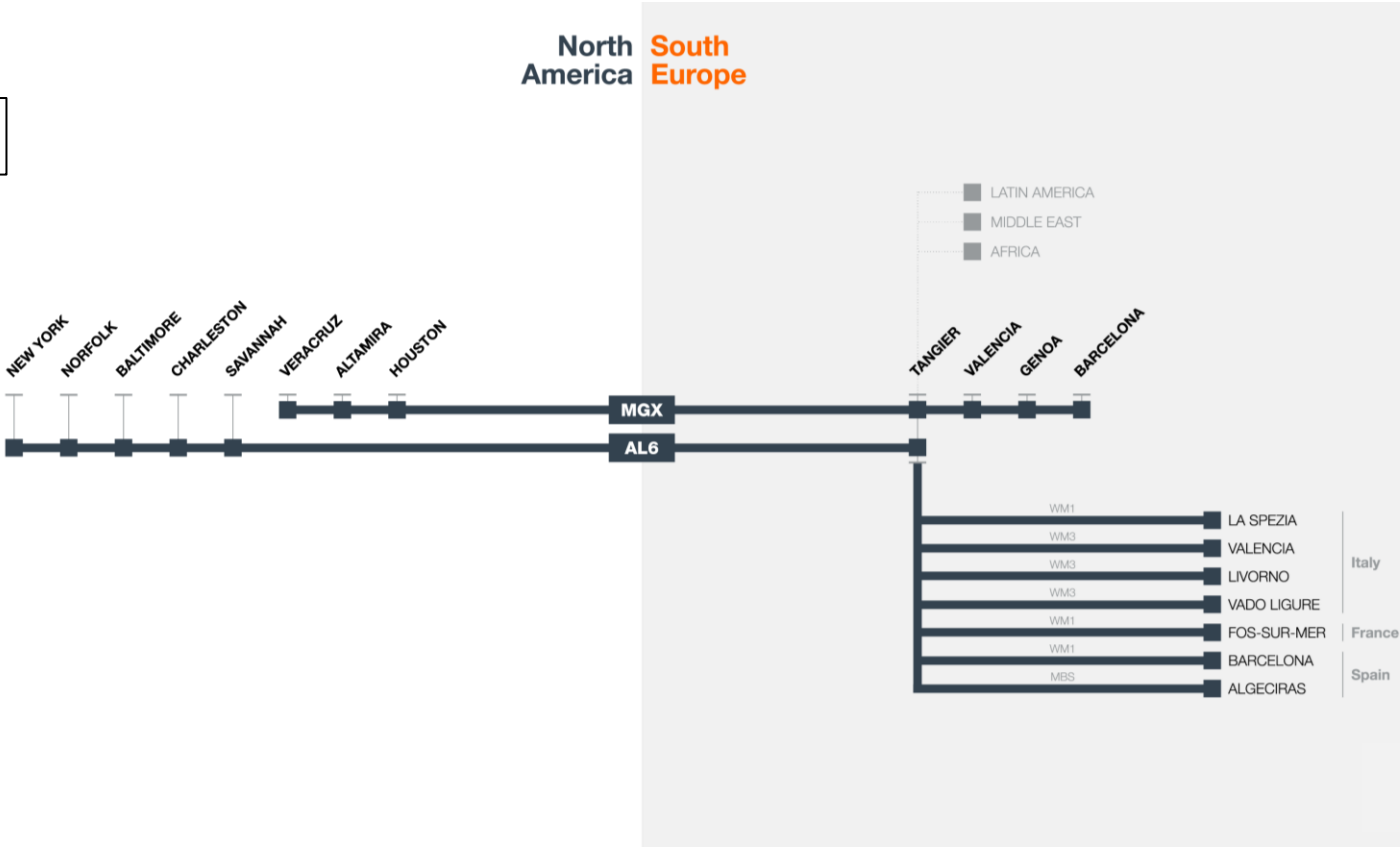


# Atlantic

## Our North America to South Europe services at a glance

- Gemini Port Calls
- Main Connecting Trade

Additional feeder port coverage available, see geographic cover maps





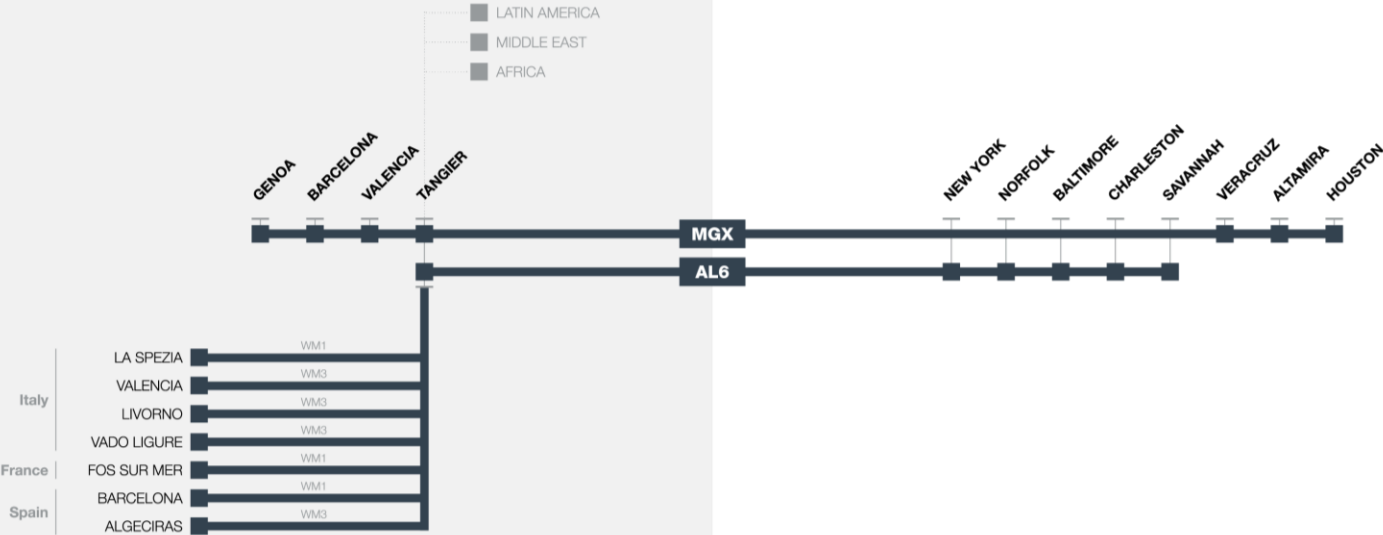
# Atlantic

## Our South Europe to North America services at a glance

- Gemini Port Calls
- Main Connecting Trade

Additional feeder port coverage available, see geographic cover maps

South Europe North America



## Mediterranean - North America

# Service Profile MGX



### KEY SERVICE VALUE PROPOSITION

- Core West Mediterranean to Mexico service without stopover in the US, with key attributes like no U.S. AMS required
- Comprehensive coverage of the Spanish market with non-stop connection from Spain to Mexico
- Eastbound and westbound calls in Valencia (ES) providing excellent connections in both directions

### IMPORTANT CONNECTIONS

- Livorno (IT) and Fos-sur-Mer (FR) connected by reliable shuttles via dedicated hub in Tangier (MA)
- Tangier (MA) calls allowing excellent connection to the global network from and to other Mediterranean markets, Africa and the Middle East

## Mediterranean - North America

# Service Profile AL6



### KEY SERVICE VALUE PROPOSITION

- Key service with extensive coverage from West Mediterranean to the US West Coast
- New York (US) as first westbound call to ensure fastest transit time

### IMPORTANT CONNECTIONS

- Shuttles via Tangier (MA) to connect the Mediterranean
- Comprehensive intermodal connections into the US Midwest

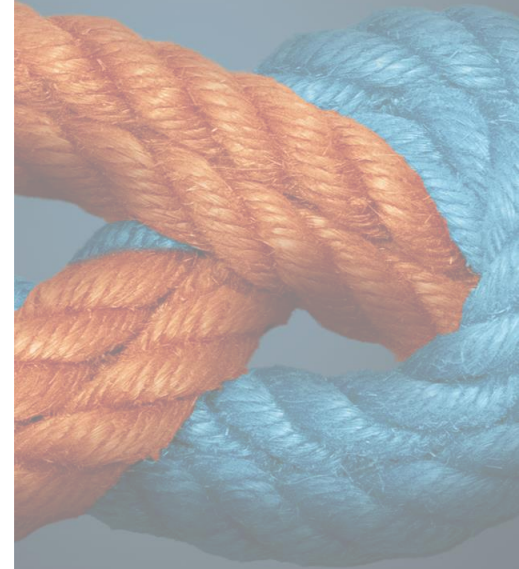
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## Transpacific

# Highlights of our Transpacific service

- Comprehensive Transpacific product with unrivalled reliability
- Delivering robust, on-time and weekly service schedules to our customers
- The new network will provide connections between all key Asia and North American ports and gateways with further inland connections to all key rail ramps and doors
- Extensive coverage of Southeast Asia and Japan through our shuttle network via hubs
- Seamless connection through our innovative Hub & Spoke system



Transpacific

# Our future Transpacific service in numbers

## KEY FACTS

9

# Services

89

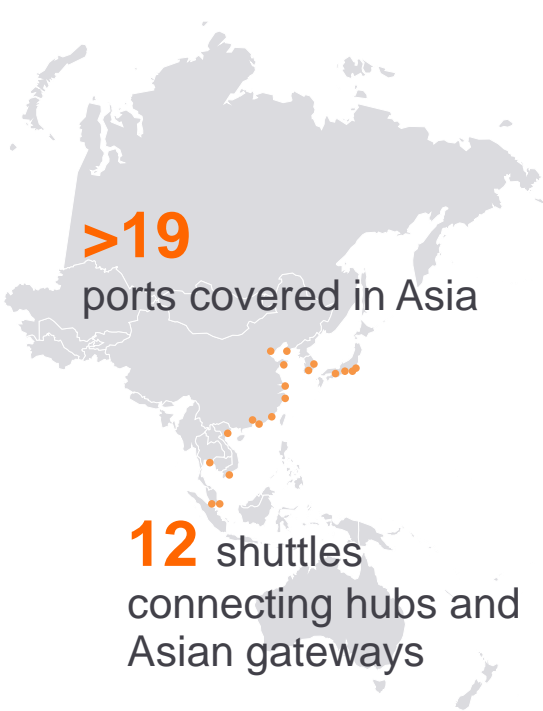
# Vessels

7

Ø Calls per service

10.2 TTEU

Ø Vessel size



## Transpacific

## Key features and improvements of our future Transpacific service

## Transit times for selected port pairs (across Transpacific network)

*Preliminary and subject to final network design*

	TO →										
FROM ↑	Los Angeles	Oakland	Tacoma	Vancouver	Prince Rupert	New York	Baltimore	Norfolk	Charleston	Houston	
Shanghai	17	27	16	25	19	34	40	38	32	31	
Yantian	16	29	20	31	23	36	47	39	37	35	
Ningbo	15	31	21	30	25	38	47	41	36	35	
Qingdao	22	31	17	27	22	39	52	42	40	37	
Xiamen	21	30	23	28	20	40	51	41	41	36	
Nansha	18	48	33	42	37	38	45	45	52	50	
Vung Tau	23	40	31	40	30	36	42	39	45	44	
Haiphong	24	34	27	36	31	40	47	44	41	40	
Laem Chabang	25	35	28	36	31	38	45	42	50	42	
Busan	14	23	12	21	16	29	51	33	31	29	

> 90%  
Schedule  
reliability

> 90%  
of volume gets faster  
or remains same<sup>1)</sup>

**Disclaimer:** Transit time subject to change

# Transpacific

## Port coverage on our Transpacific services



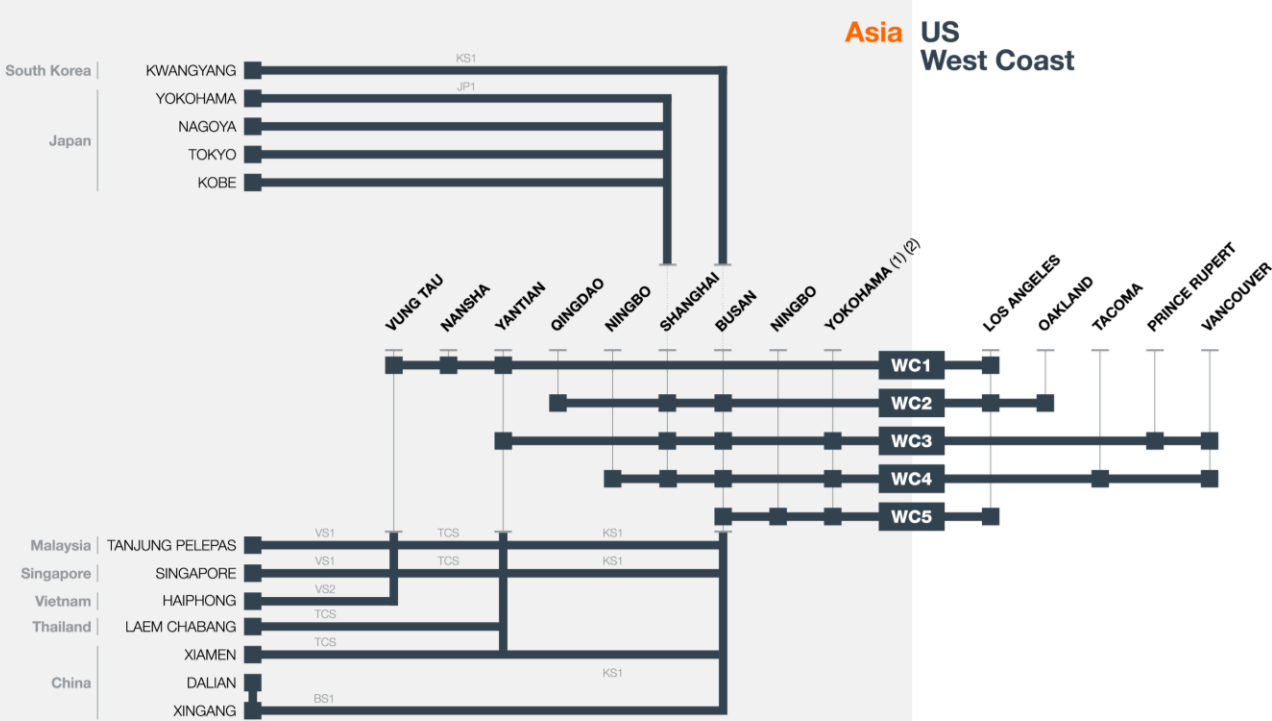


# Transpacific

## Our Asia to US West Coast services at a glance

Gemini Port Calls  
 Main Connecting Trade

Additional feeder port coverage available, see geographic cover maps



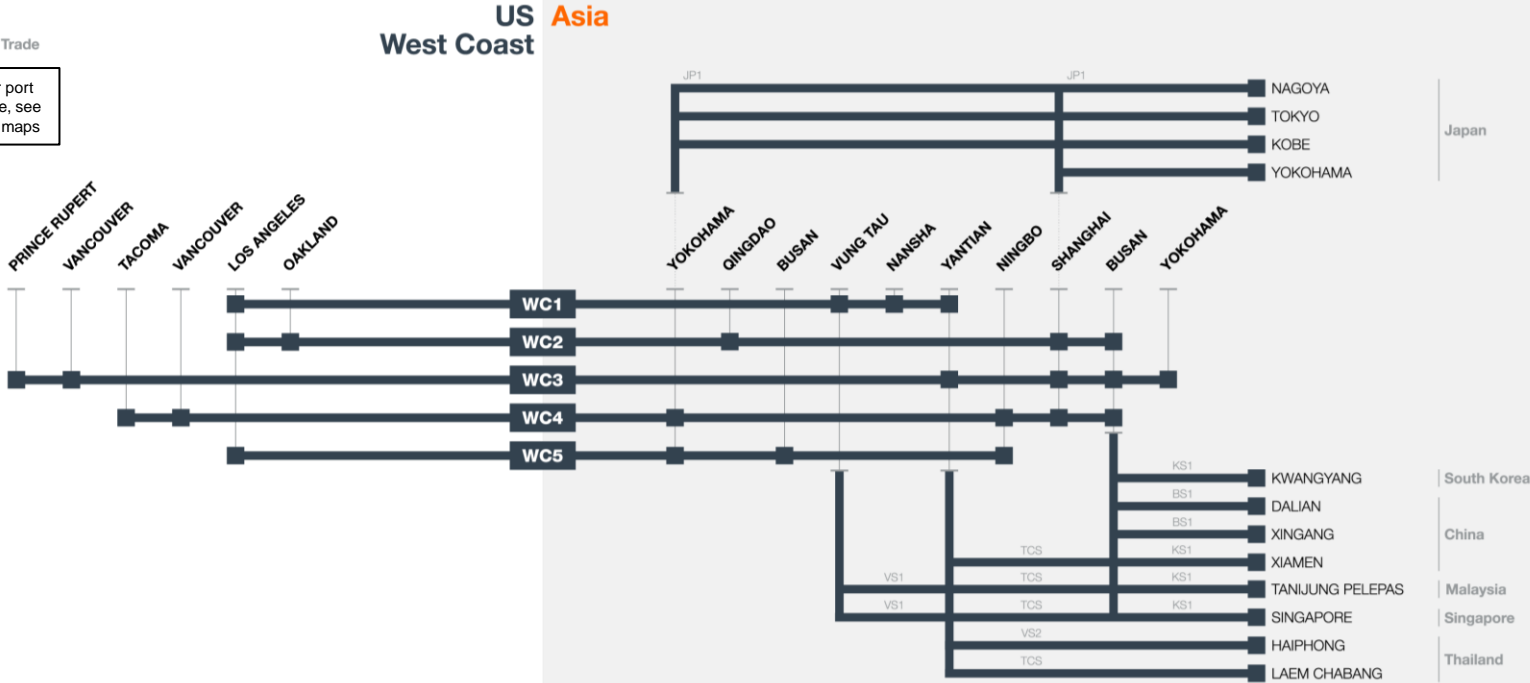
(1) WC5 Rotation: Yokohama – Busan – Ningbo  
 (2) WC4 Rotation: Yokohama – Ningbo – Shanghai – Busan

# Transpacific

## Our US West Coast to Asia services at a glance

- Gemini Port Calls
- Main Connecting Trade

Additional feeder port coverage available, see geographic cover maps



## Asia - US West Coast

**Service Profile WC1****KEY SERVICE VALUE PROPOSITION**

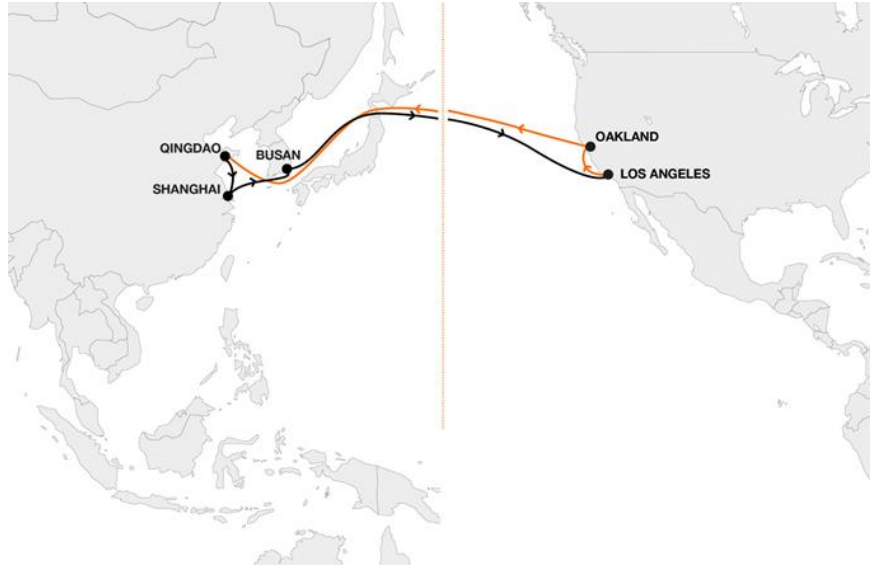
- Key service to connect Southeast Asia to the US West Coast
- Direct connection from Yantian (CN) to Los Angeles (US)
- Direct connection from Los Angeles (US) to Vung Tau (VN)

**IMPORTANT CONNECTIONS**

- Shuttle via Vung Tau (VN) and Yantian (CN) connects cargo to the remaining Asian service network

## Asia - US West Coast

# Service Profile WC2



### KEY SERVICE VALUE PROPOSITION

- Key service to connect Central China and South Korea to the US West Coast
- Direct connection from Busan (KR) to Los Angeles (US)
- Direct connection from Oakland (US) to Qingdao (CN)

### IMPORTANT CONNECTIONS

- Connection via Shanghai (CN) serves Japanese cargo
- Shuttle via Busan (KR) to connect the Bohai sea

## Asia - Canada West Coast

# Service Profile WC3



### KEY SERVICE VALUE PROPOSITION

- Key service to connect China, South Korea and Japan to the Canada West Coast
- Canada only service to Vancouver (CA) and direct connection to Prince Rupert (CA)

### IMPORTANT CONNECTIONS

- Connection via Shanghai (CN) serves remaining Japanese cargo and Shuttle via Busan (KR) to connect the Bohai sea
- Inland network connects to all key rail ramps and doors in Canada and the US

## Asia - Canada and US West Coast

# Service Profile WC4



### KEY SERVICE VALUE PROPOSITION

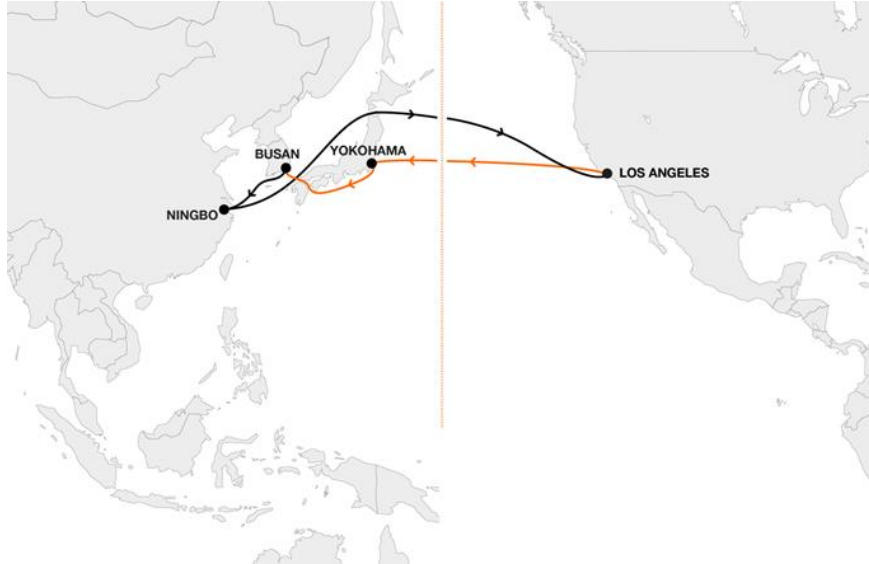
- Key service to connect Central China, South Korea and Japan to the Canada West Coast and US West Coast
- Direct connection from Busan (KR) to Tacoma (US)
- Direct connection from Vancouver (CA) to Yokohama (JP)

### IMPORTANT CONNECTIONS

- Connection via Shanghai (CN) serves remaining Japanese cargo and Shuttle via Busan (KR) to connect the Bohai sea
- Inland network connects to all key rail ramps and doors in Canada and the US

## Asia - US West Coast

# Service Profile WC5



### KEY SERVICE VALUE PROPOSITION

- Key service to connect Central China, South Korea and Japan to the US West Coast
- Direct connection from Ningbo (CN) to Los Angeles (US)
- Direct connection from Los Angeles (US) to Yokohama (JP)

### IMPORTANT CONNECTIONS

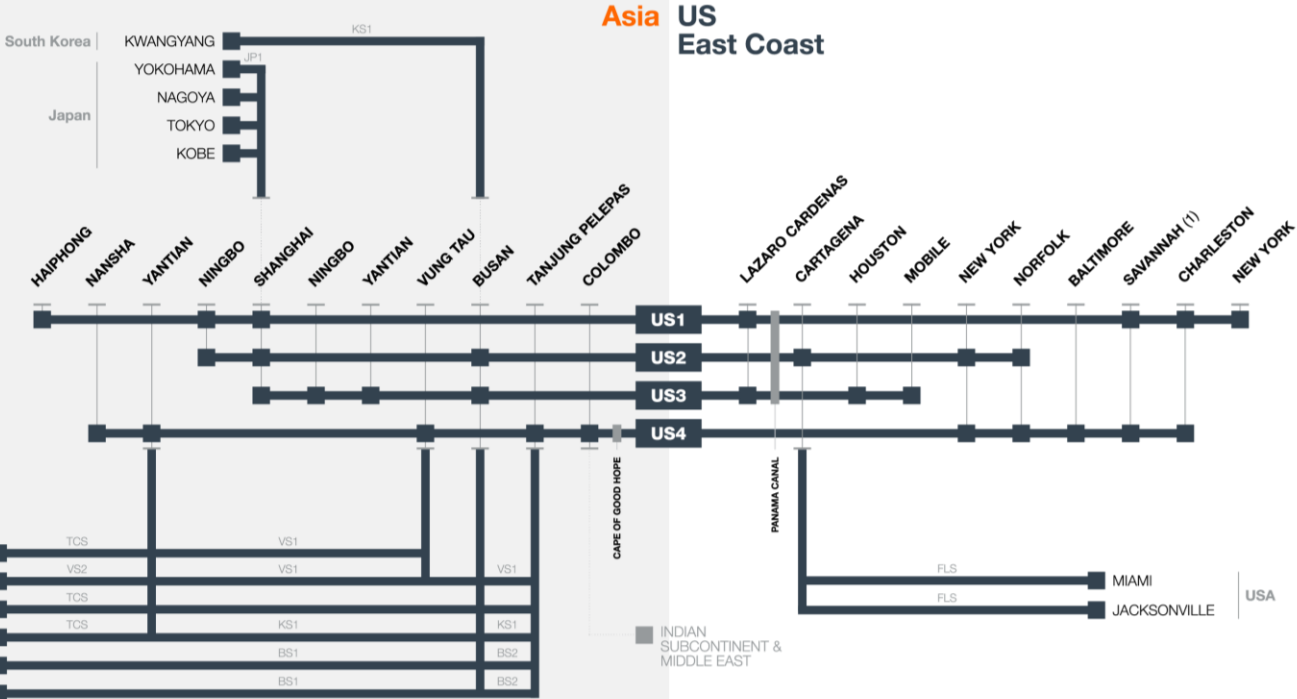
- Shuttle from Busan (KR) serves the markets of the Bohai Sea

# Transpacific

# Our Asia to US East Coast services at a glance

Gemini Port Calls  
 Main Connecting Trade

Additional feeder port coverage available, see geographic cover maps



(1) US4 Rotation: Charleston – Savannah

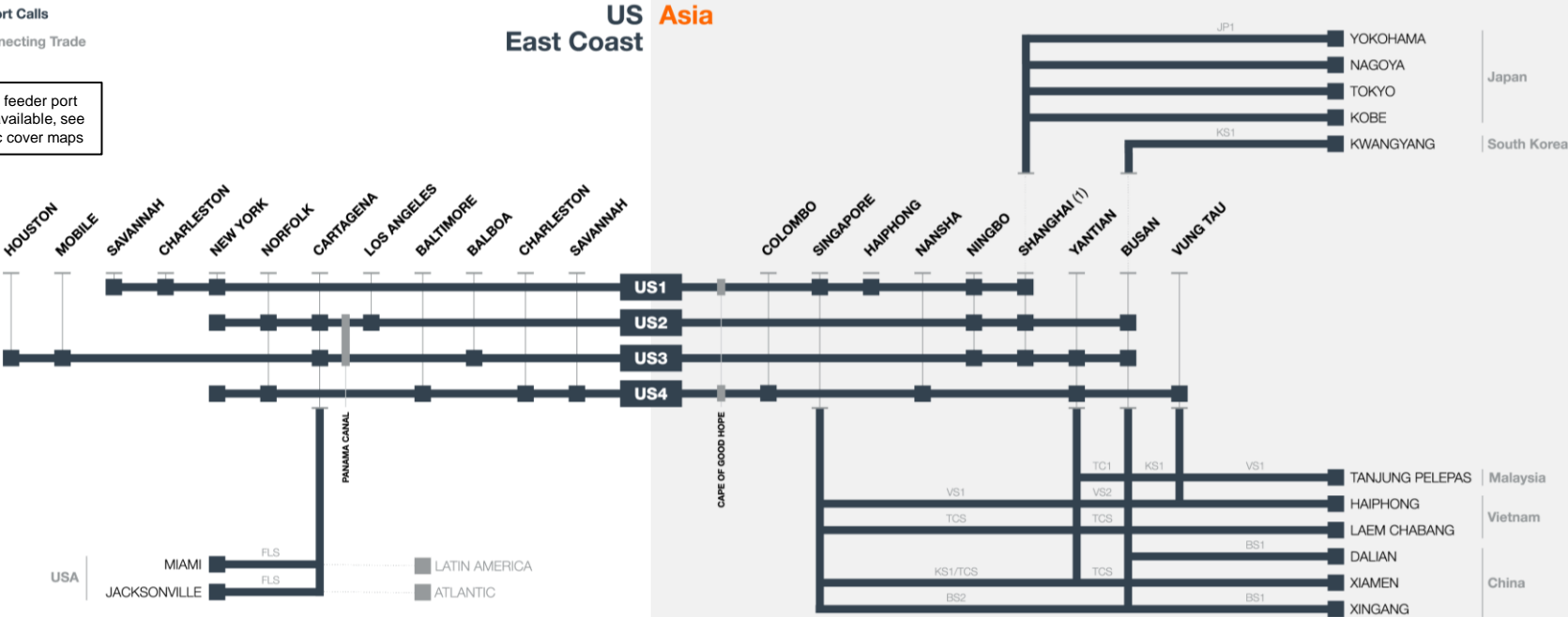


# Transpacific

## Our US East Coast to Asia services at a glance

- Gemini Port Calls
- Main Connecting Trade

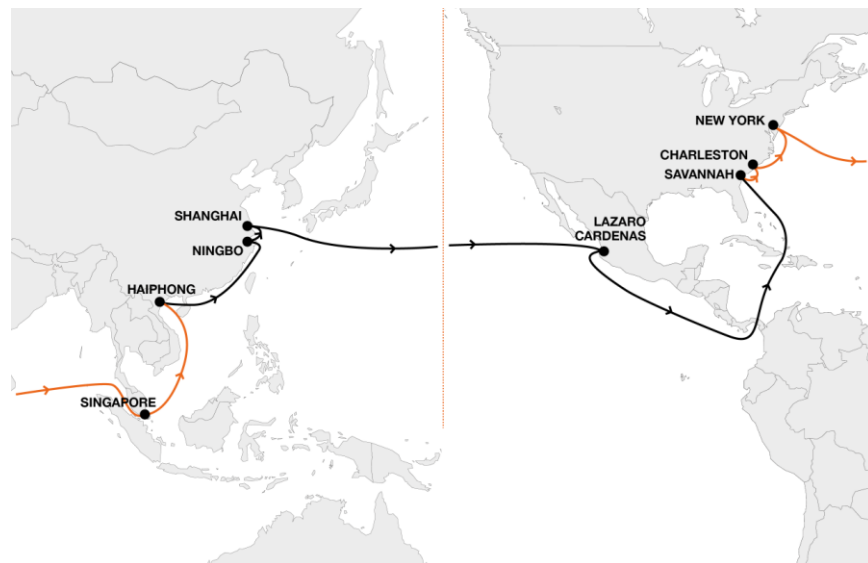
Additional feeder port coverage available, see geographic cover maps



(1) US3 Rotation Shanghai - Ningbo

## Asia - US West Coast

## Service Profile US1



## KEY SERVICE VALUE PROPOSITION

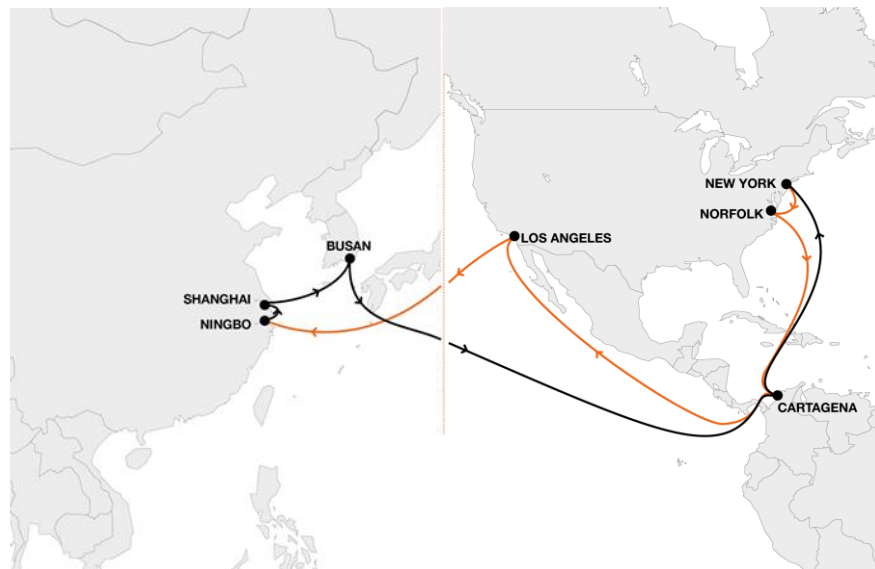
- Key service to connect Central China and Southeast Asia to Lazaro Cardenas (MX) and the US East Coast via the Panama Canal
- Direct connection from Shanghai (CN) to Lazaro Cardenas (MX)

## IMPORTANT CONNECTIONS

- Shuttles via Shanghai (CN) for Korean and Japanese and via Haiphong (VN) for Southeast Asian cargo
- Cross-border rail network accesses to Dallas (US) via Lazaro Cardenas (MX)
- Comprehensive intermodal connections into the US Midwest

## Asia - US West Coast

## Service Profile US2



## KEY SERVICE VALUE PROPOSITION

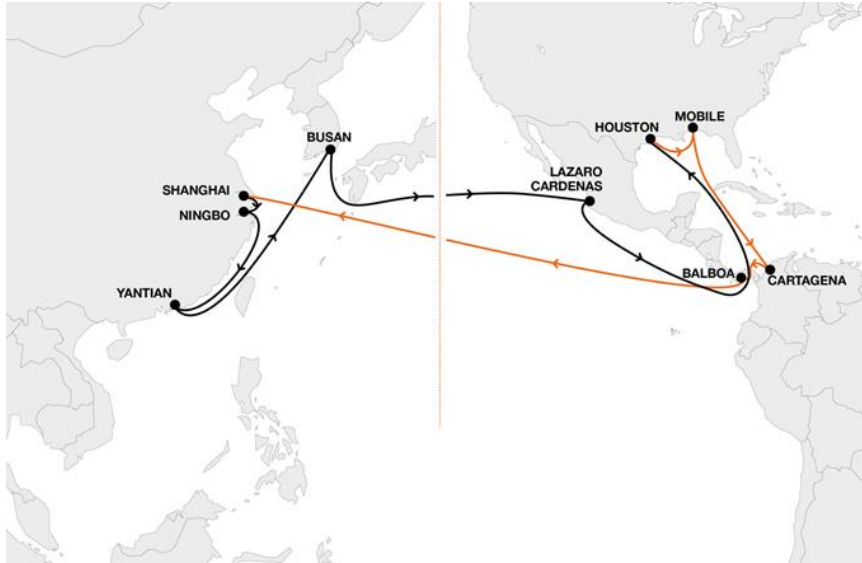
- Key service to connect Central China, South Korea and Japan to the US via the Panama Canal with stopover at Cartagena (CO)
- Direct connection from Los Angeles (US) to Ningbo (CN)

## IMPORTANT CONNECTIONS

- Shuttles via Shanghai (CN) for Japanese cargo
- Direct connection to Cartagena (CO) serves as a link to Latin American markets and Florida (US)
- Comprehensive intermodal connections into the US Midwest

## Asia - US Gulf Coast

# Service Profile US3



### KEY SERVICE VALUE PROPOSITION

- Key service to connect Central China, South Korea and Japan to Lazaro Cardenas (MX) and the US Gulf Coast via the Panama Canal with stopovers in Balboa (PA) and Cartagena (CO)
- Direct connection from Cartagena (CO) to Shanghai (CN)

### IMPORTANT CONNECTIONS

- Shuttles via Shanghai (CN) for Japanese cargo
- Cross-border rail network accesses to Dallas (US) via Lazaro Cardenas (MX)
- Direct connection to Cartagena (CO) serves as a link to Latin American markets and Florida (US)

## Asia - US East Coast

## Service Profile US4



## KEY SERVICE VALUE PROPOSITION

- Key service to connect the US East Coast with Southeast Asia and South China with a connection to the Indian subcontinent via Colombo (LK)
- Coverage of all US East coast ports

## IMPORTANT CONNECTIONS

- Shuttles via Shanghai (CN) for Korean and Japanese and via Tanjung Pelepas (MY) for Southeast Asian, South China and Bohai sea cargo
- Connection via Colombo (LK) into the Indian subcontinent
- Comprehensive intermodal connections into the US Midwest

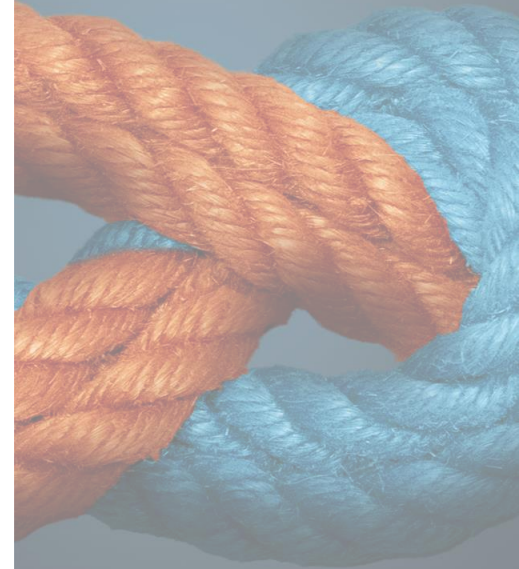
# Agenda

- |           |  |           |
|-----------|--|-----------|
| A.        | Gemini Cooperation Network at a Glance             | 2         |
| B.        | Trade Overview Asia - Europe                       | 7         |
| C.        | Trade Overview Atlantic                            | 28        |
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| <b>E.</b> | <b>Trade Overview Middle East</b>                  | <b>62</b> |
| F.        | Overview Shuttle Network and Intra Regional Trades | 78        |

## Middle East

# Highlights of our Middle East service

- Comprehensive Middle East product with unrivalled reliability
- Delivering robust, on-time and weekly service schedules to our customers
- Broad coverage of all key markets in Middle East, North and South Europe through a dedicated shuttle network, seamlessly connected in selected own / and or controlled hubs
- Multiple options with enhanced connectivity to key trades like Africa, Atlantic, Far East, Latin America and Transpacific



Middle East

# Our future Middle East service in numbers

## KEY FACTS

6

# Services

42

# Vessels

7

Ø Calls per service

12 TTEU

Ø Vessel size

>24

ports covered in Europe

>14

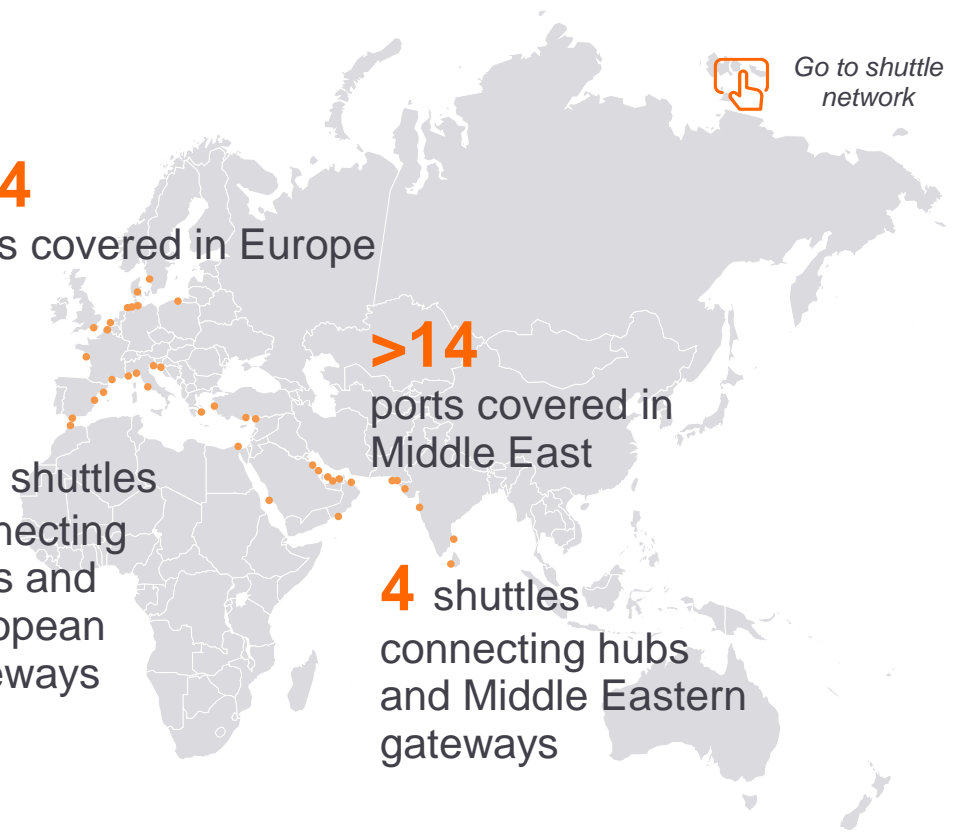
ports covered in Middle East

13 shuttles connecting hubs and European gateways

4 shuttles connecting hubs and Middle Eastern gateways



Go to shuttle network





## Middle East

## Key features and improvements of our future Middle East service

## Transit times for selected port pairs (across Middle East Network)

Preliminary and subject to final network design

FROM	TO									
	Jebel Ali	Jeddah	Dammam	Hamad	Salalah	Nhava Sheva	Mundra	Chennai	Karachi	Colombo
Hamburg	37	23	40	39	33	44	41	35 <sup>2</sup>	43	35
Rotterdam	30	18	33	32	25	37	34	32	36	29
London Gateway	32	18	36	34	28	39	36	39	38	36
Genoa	32	18	35	34	28	39	36	32	38	29
Izmit	47	18	54	56	44	55	52	46	53	41

FROM	TO									
	Hamburg	Rotterdam	Antwerp	London Gateway	Valencia	Fos-sur-Mer	Genoa	Istanbul	Mersin	Izmit
Nhava Sheva	37	33	35	41	30	35	31	45	43	43
Mundra	40	37	39	45	33	39	35	49	46	47
Chennai	36 <sup>3</sup>	32	36	34	31	33	35	64	55	62
Jubail	46	42	45	50	35	42	36	52	49	50
Jeddah	23	19	22	21	13	19	13	10	8	8

> 90%  
Schedule  
reliability

> 75%  
of volume gets faster  
or remains same<sup>1)</sup>

**Disclaimer:** Transit time subject to change

## Middle East

## Port coverage on our Middle East – North Europe services



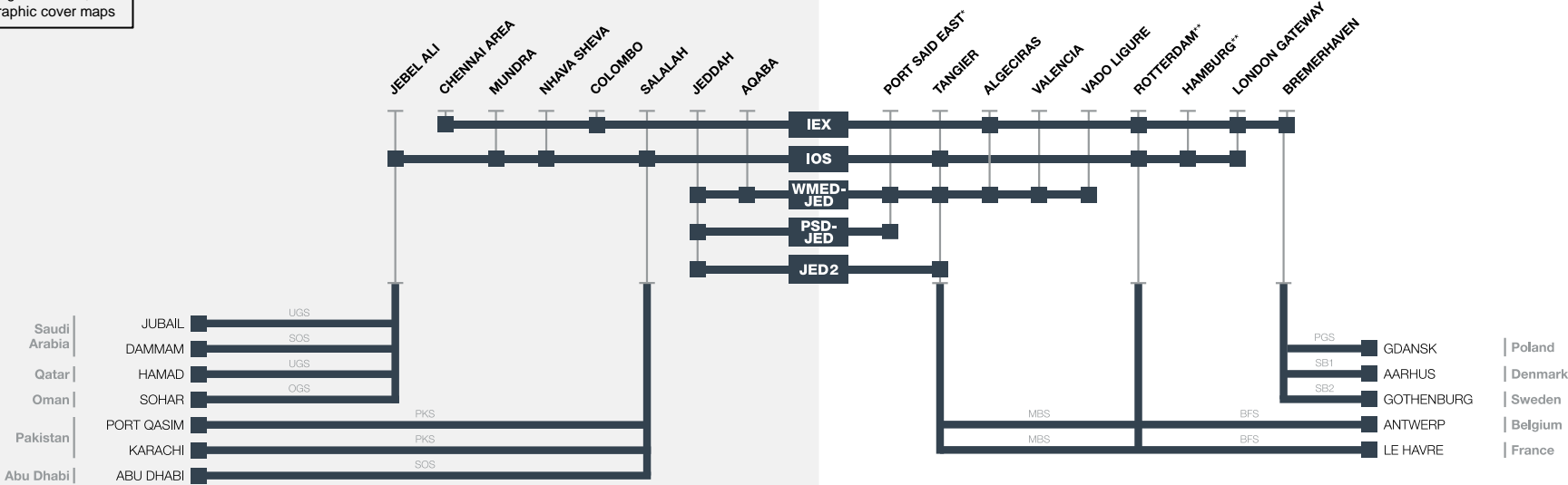
# Middle East

## Our Middle East to North Europe services at a glance

Gemini Port Calls  
 Main Connecting Trade

Additional feeder port coverage available, see geographic cover maps

Middle East North Europe



\* Certain Port Said East EB Calls will be shifted to Damietta during 2025

\*\* Transpacific & Latin America connected via NC HUBS

# Middle East

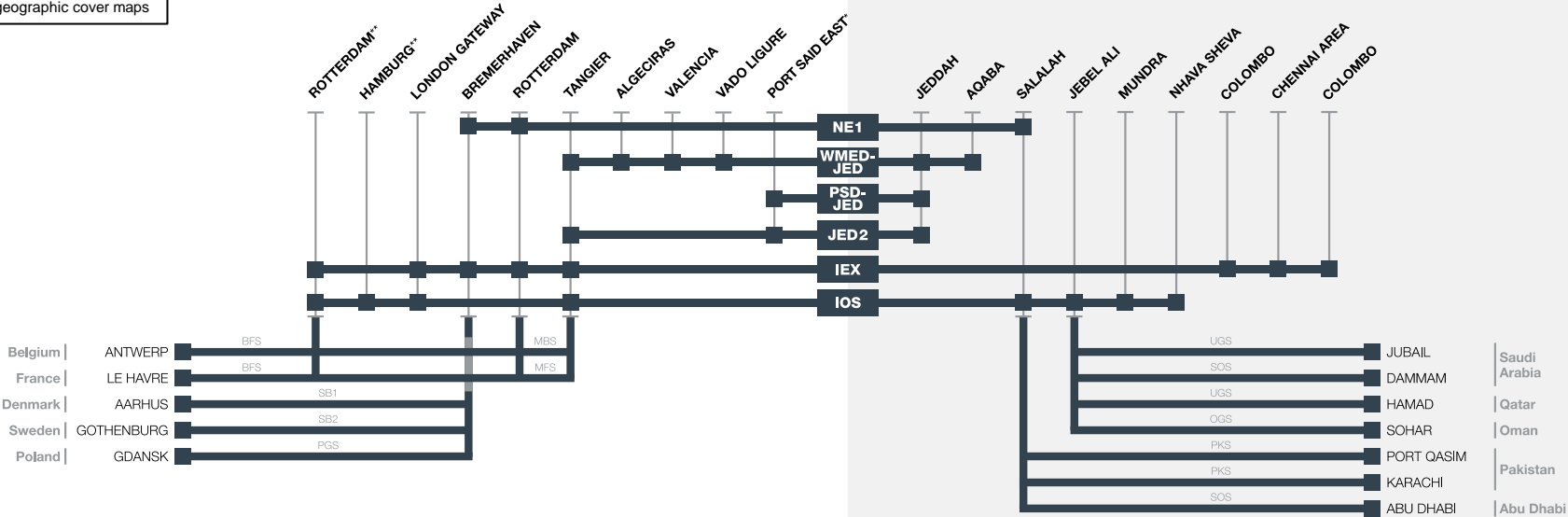
## Our North Europe to Middle East services at a glance

■ Gemini Port Calls

■ Main Connecting Trade

Additional feeder port coverage available, see geographic cover maps

North Europe Middle East



\* Certain Port Said East EB Calls will be shifted to Damietta during 2025

\*\*Transpacific & Latin America connected via NC HUBS

## Middle East - North Europe

# Service Profile IEX



### KEY SERVICE VALUE PROPOSITION

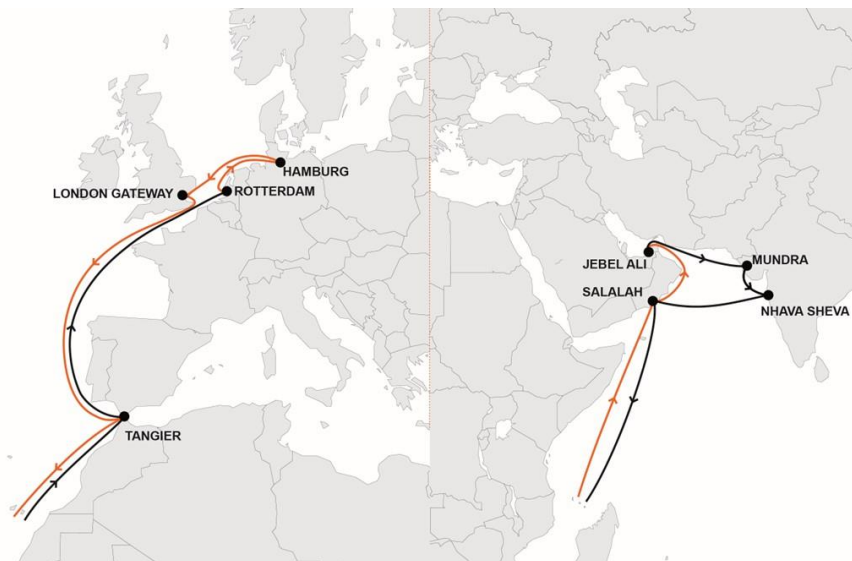
- Key service for connections from the Indian Subcontinent to North Europe via the Cape of Good Hope
- Connection especially relevant for sensitive and high value cargo of those markets, e.g. reefer, OOG and break-bulk

### IMPORTANT CONNECTIONS

- Shuttles via Bremerhaven (DE) to connect Scandinavia and via Rotterdam (NL) to connect Antwerp (BE), and Le Havre (FR)
- Shuttles via Tangier (MA) and Algeciras (ES) to connect the Mediterranean
- Connecting into the Indian Subcontinent via Colombo (LK)

## Middle East - Mediterranean

# Service Profile IOS



### KEY SERVICE VALUE PROPOSITION

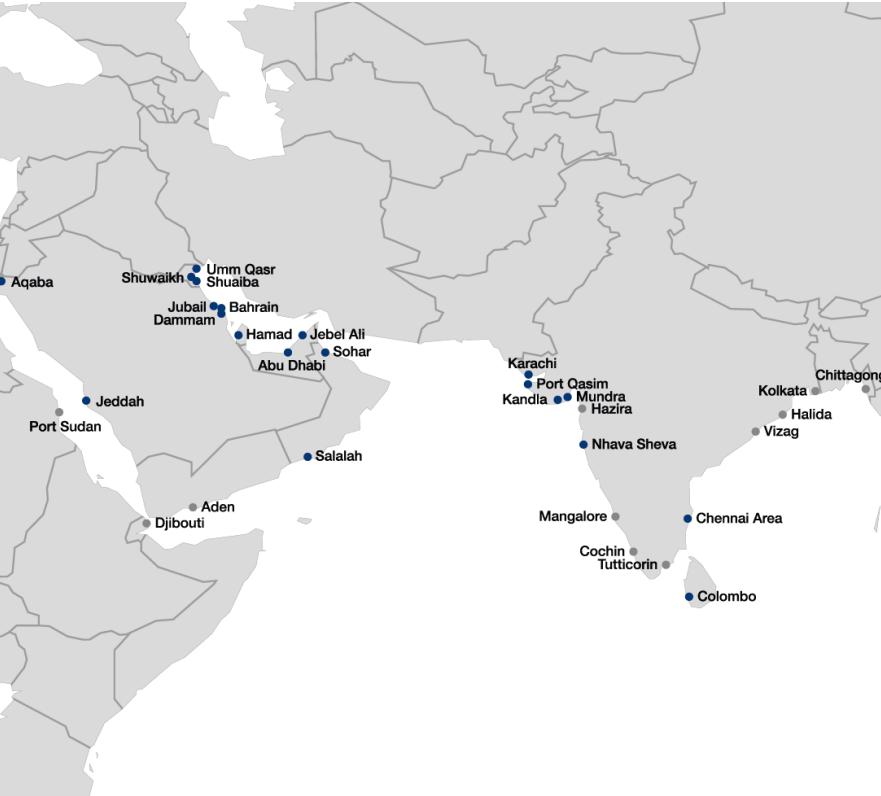
- Key service between North Europe, the Indian Subcontinent, Red Sea and Arabian Gulf
- Serving the markets of Africa, US East Coast and Latin America through a direct connection to Tangier (MA)
- Additional coverage of Jebel Ali (AE), Salalah (OM), Mundra (IN) and Nhava Sheva (IN) next to IMX

### IMPORTANT CONNECTIONS

- Shuttles via Rotterdam (NL) connect to Antwerp (BE) and Le Havre (FR)
- Shuttles via Salalah (OM) and Jebel Ali (UA) connect to the Persian Gulf and Pakistan

## Middle East

# Port coverage on our Middle East – South Europe services



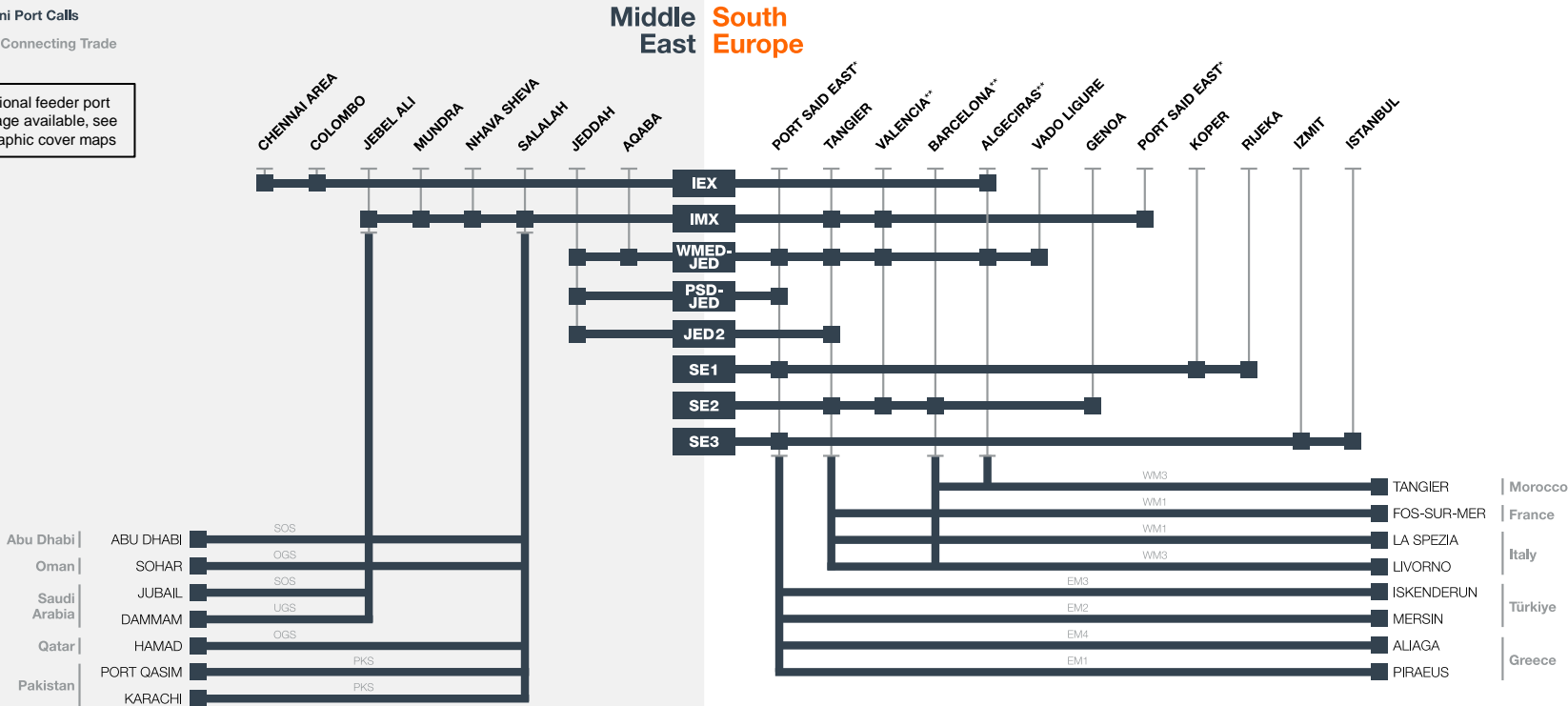
# Middle East

## Our Middle East to South Europe services at a glance

■ Gemini Port Calls

■ Main Connecting Trade

Additional feeder port coverage available, see geographic cover maps



\* Certain Port Said East EB Calls will be shifted to Damietta during 2025  
 \*\* Transpacific & Latin America connected via West MED HUB

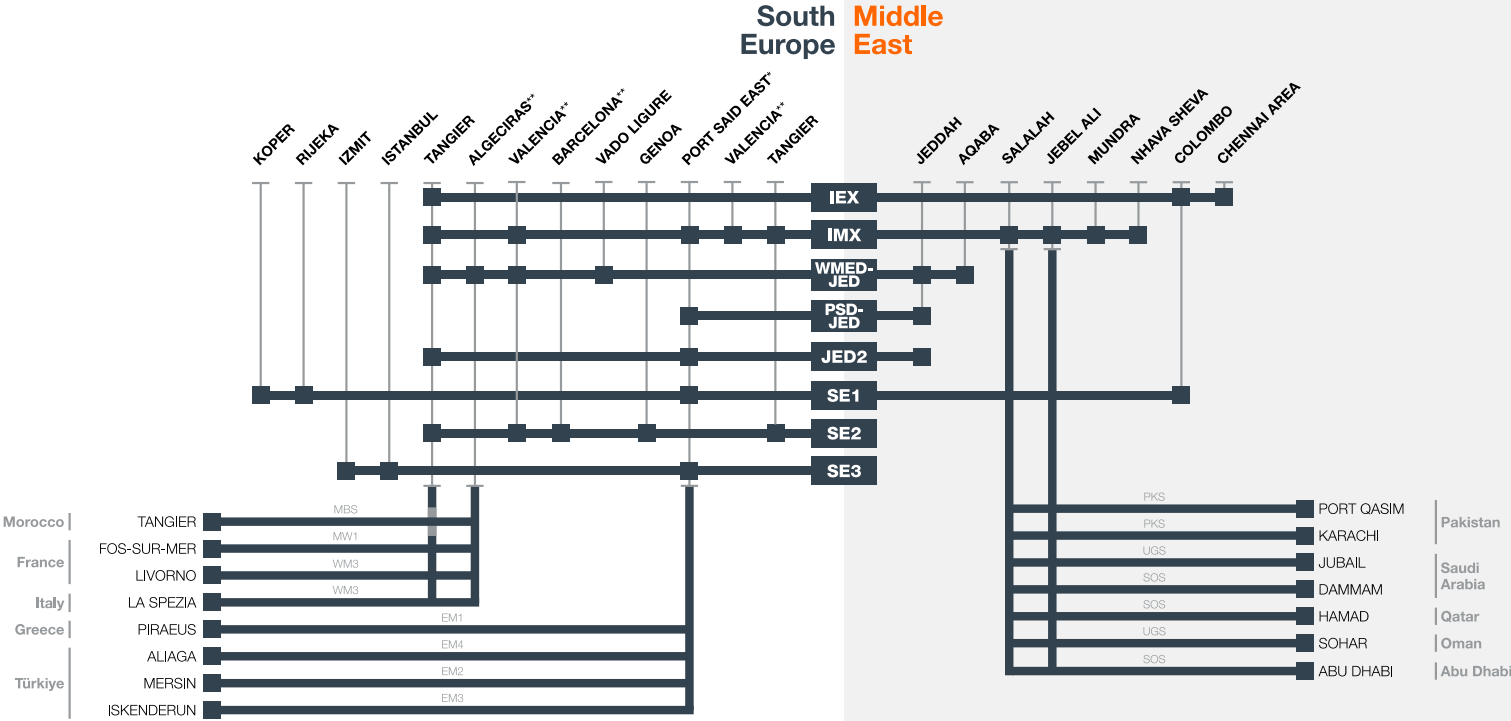


# Middle East

## Our South Europe to Middle East services at a glance

- Gemini Port Calls
- Main Connecting Trade

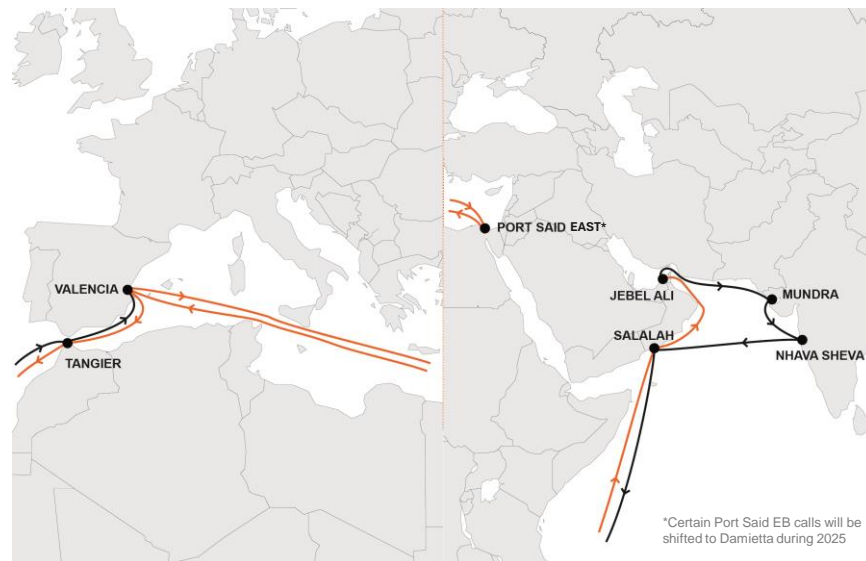
Additional feeder port coverage available, see geographic cover maps



\* Certain Port Said East EB Calls will be shifted to Damietta during 2025  
 \*\* Transpacific & Latin America connected via West MED HUB

## Middle East - Mediterranean

# Service Profile IMX



### KEY SERVICE VALUE PROPOSITION

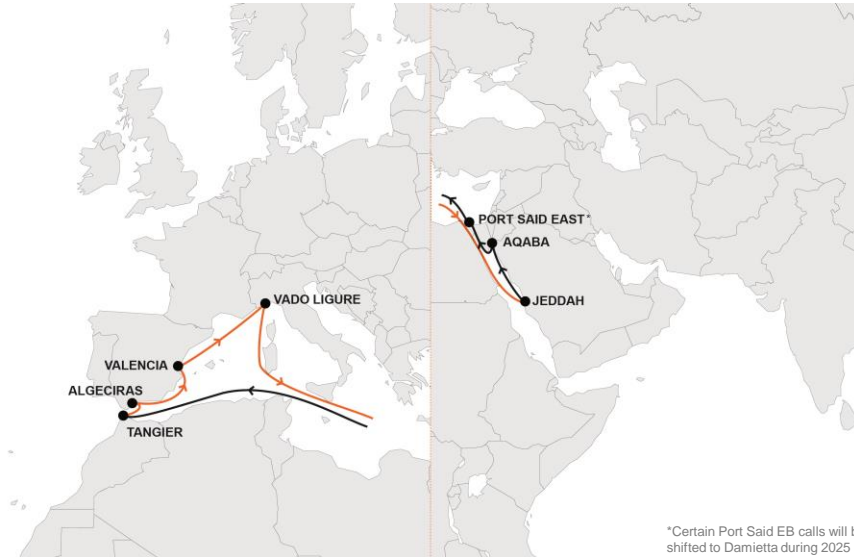
- Key service for connections from the West Mediterranean to the Middle East and West India via the Cape of Good Hope
- Connection especially relevant for sensitive and high value cargo, e.g. reefer, OOG and break-bulk cargo
- Additional coverage of Jebel Ali (AE), Salalah (OM), Mundra (IN) and Nhava Sheva (IN) next to IOS

### IMPORTANT CONNECTIONS

- Connections via Tangier (MA), Valencia (ES) and Port Said (EG) to connect the remaining Mediterranean
- Shuttles via Salalah (OM) and Jebel Ali (UA) connect the Persian Gulf and Pakistan

## Middle East - Mediterranean

# Service Profile WMED-JED



## KEY SERVICE VALUE PROPOSITION

- Key service for connection from the Red Sea through Jeddah (SA), Algeciras (ES) and Tangier (MA)

## IMPORTANT CONNECTIONS

- Shuttles via Algeciras (ES) to connect to the remaining Mediterranean
- Connection from Jeddah (SA) to Aqaba (JO)

## Middle East - Mediterranean

# Service Profile PSD-JED



### KEY SERVICE VALUE PROPOSITION

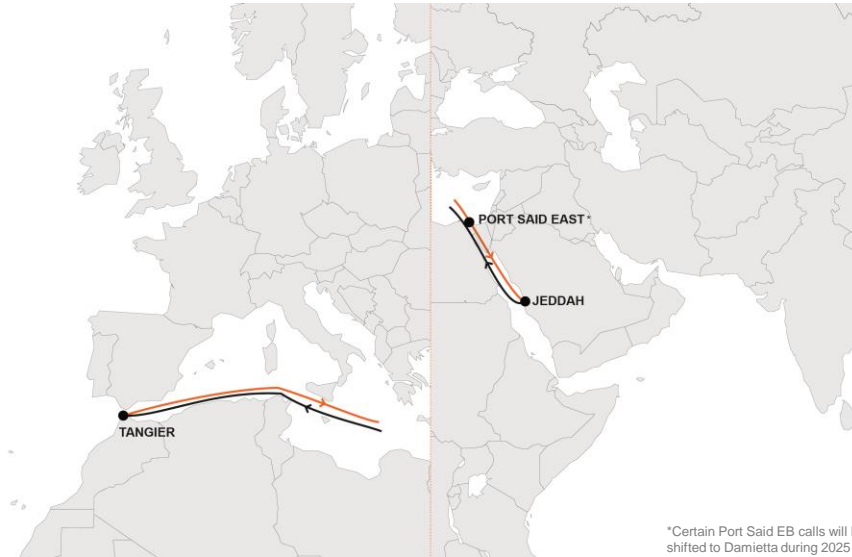
- Key service within the Red Sea between Port Said East (EG) and Jeddah (SA)

### IMPORTANT CONNECTIONS

- Port Said East (EG) enables fast and efficient transit from and to Greece and the Black Sea markets
- Connection from Jeddah (SA) to Aqaba (JO)

## Middle East - Mediterranean

# Service Profile Jeddah 2



## KEY SERVICE VALUE PROPOSITION

- Key service connecting Jeddah (SA) with Tangier (MA) transiting through the Suez Canal via Port Said East (EG)

## IMPORTANT CONNECTIONS

- Port Said East (EG) enables fast and efficient transit from and to Greece and the Black Sea markets
- Tangier (MA) to connect the remaining Mediterranean

# Agenda

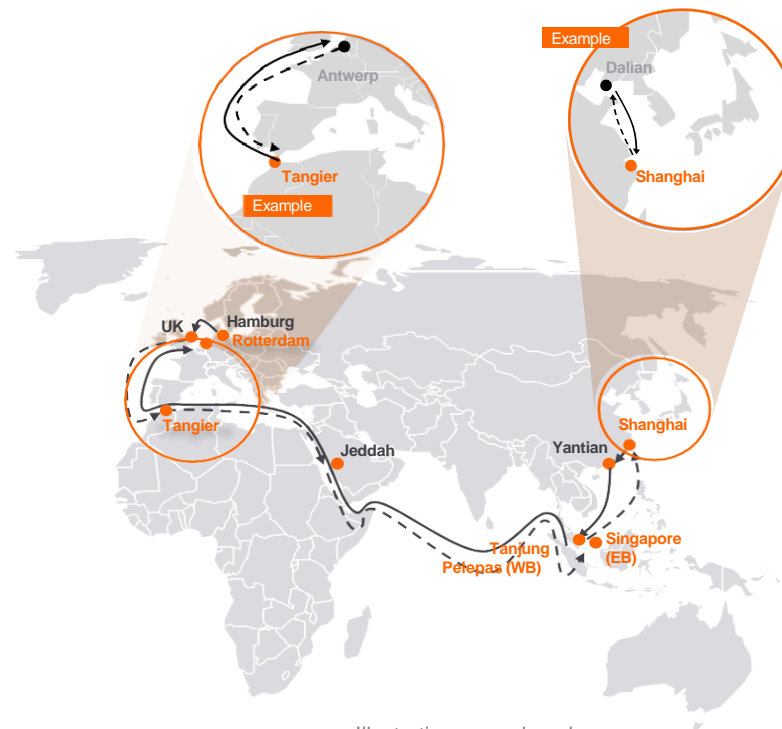
- A. Gemini Cooperation Network at a Glance 2
- B. Trade Overview Asia - Europe 7
- C. Trade Overview Atlantic 28
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- E. Trade Overview Middle East 62
- F. Overview Shuttle Network and Intra Regional Trades 78**

# The joint network uses a hub and spoke model to make it much more reliable and resilient, with fast connectivity

## NETWORK PRINCIPLES

- **Setup with 2-3 main port calls** per region including strategic hubs enable shorter round voyage times and better reliability
- **All hub terminals are carefully selected for top quality and reliability plus mostly owned and/or controlled** by Hapag-Lloyd or Maersk
- Hub & Spoke with multiple shuttles provide **wide coverage** and **fast connections**
- **Synchronized** connections from **mainliners** to **mainliners** and **to shuttles** significantly reduce dwell times

This network is much more **reliable** and **interconnected** than traditional setups, increasing **resilience** against external effects. We will reach this through a combination of streamlined port calls, controlled hubs and dedicated shuttle services.

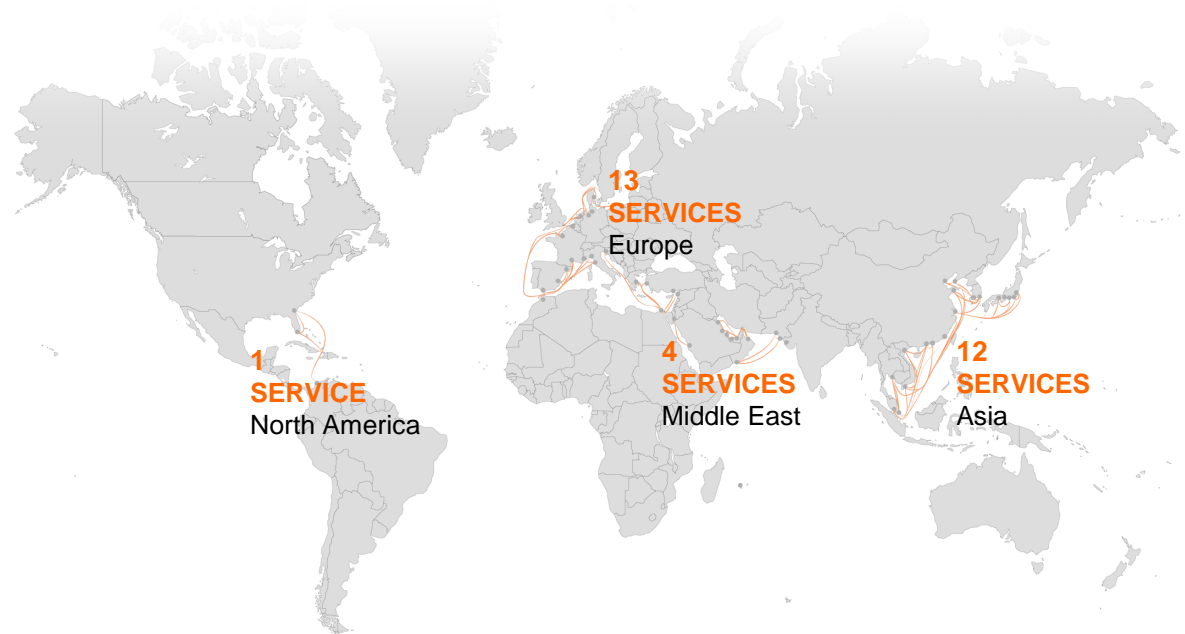


Illustrative example only

# Our dedicated shuttles complement our network with fast and reliable connections within the regions and serve Intra Regional Trades

## HIGHLIGHTS

- **Extensive shuttle network** covering Europe, Asia, Middle East and North America
- **Shuttles** are dedicated to **serve** the **Gemini Cooperation partners**
- **Shuttles** are **deployed by the Gemini Cooperation partners**
- Shuttle network offers **competitive solutions** for **Intra Regional Trade cargo**
- **Shuttles will connect to selected other Hapag-Lloyd services** that are not part of the Gemini Cooperation

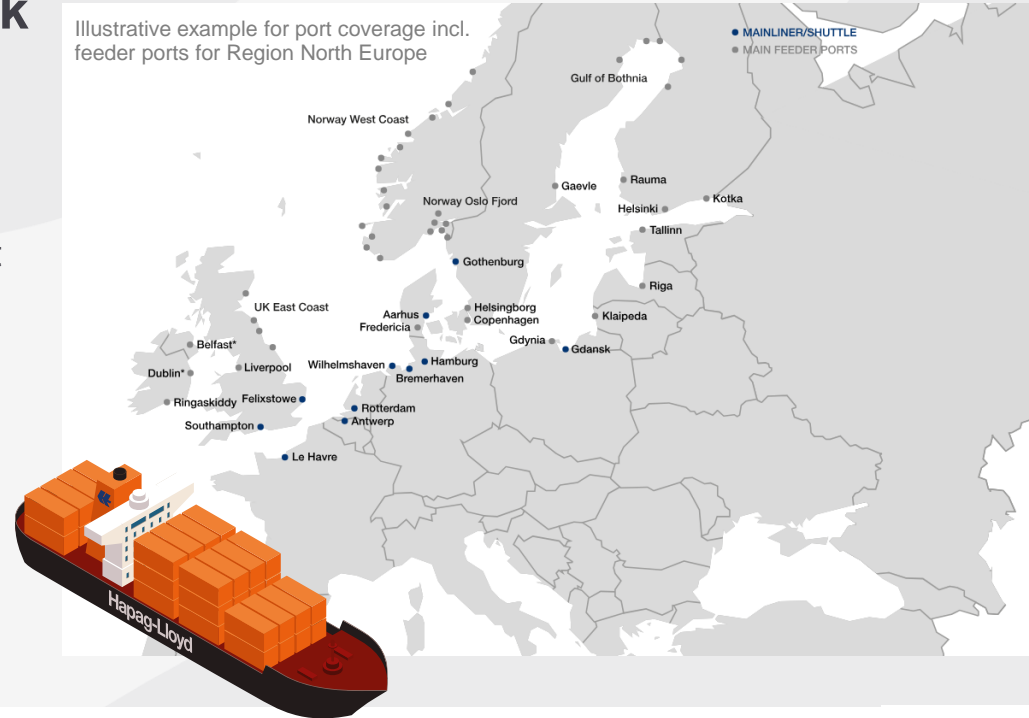




# Our feeder network will enhance our broad connectivity in specific markets

## Complementing Feeder Network

- Smaller sized vessels operated by either Hapag-Lloyd or strategic suppliers
- Extension of our existing hub and shuttle port coverage ensuring seamless connectivity in specific markets
- Next to our mainliner and shuttle network, an integral part to support our customers cargo planning globally
- Supporting the optimization of routes and vessel deployments to contribute further to our reliability goals



# North America Shuttle



## KEY FACTS

1 shuttle

3 ports

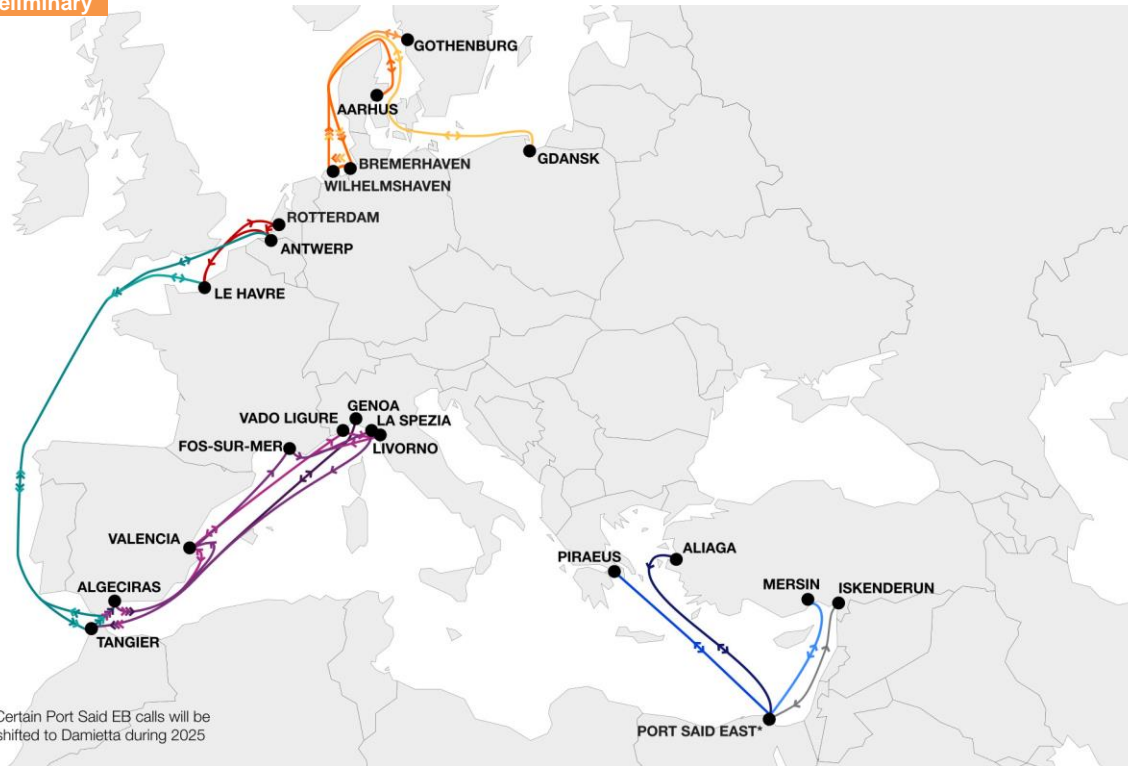
2 vessels

**2.8 TTEU** Ø vessel size

3 calls per shuttle (Ø)

# Europe Shuttles

Preliminary



## KEY FACTS

**13** shuttles

**23** ports

**22** vessels

**4 TTEU** Ø vessel size

**4** calls per shuttle (Ø)

# Europe Shuttles (1/2)

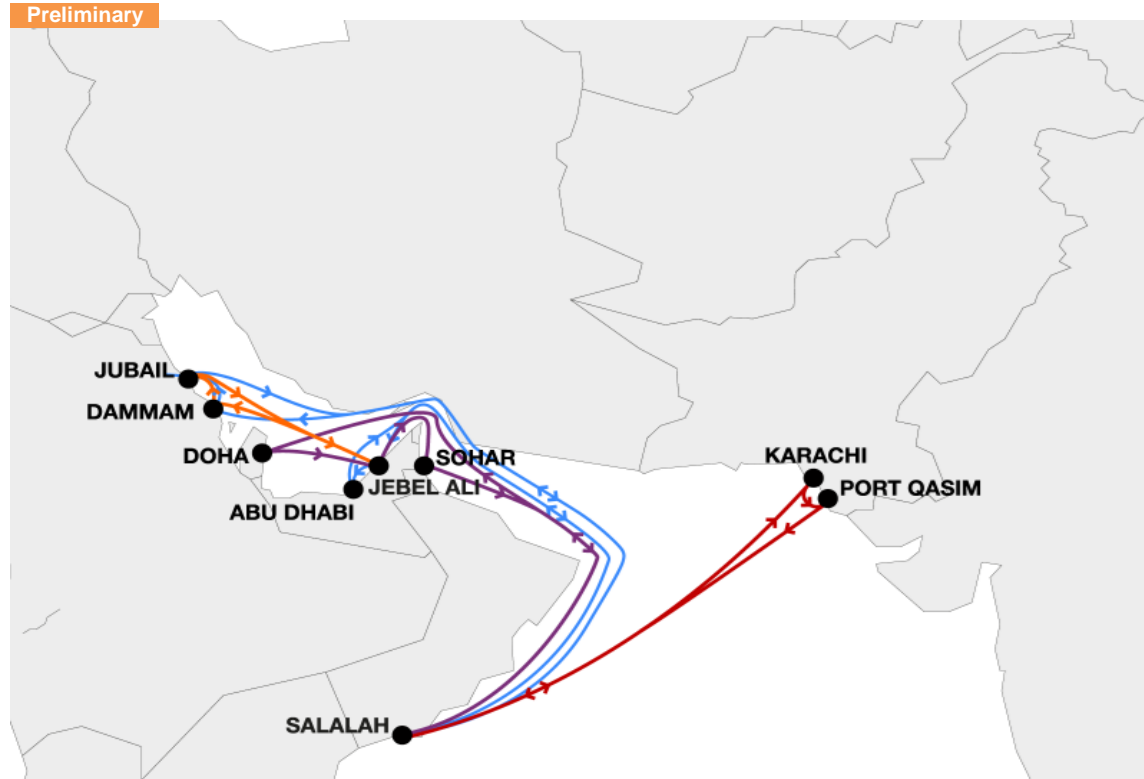
Preliminary



# Europe Shuttles (2/2)



# Middle East Shuttles



## KEY FACTS

4 shuttles

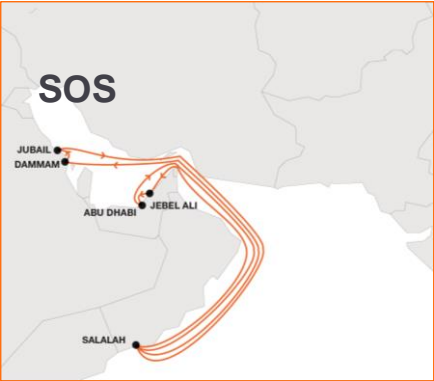
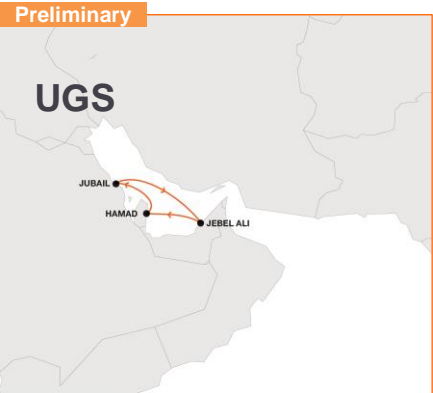
9 ports

10 vessels

5 TTEU  $\emptyset$  vessel size

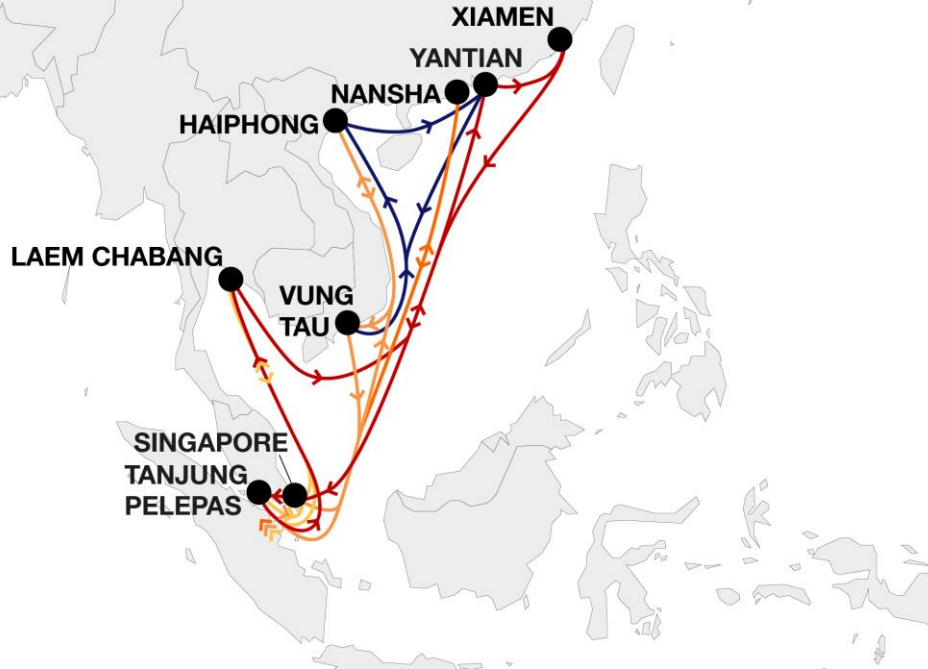
3 calls per shuttle ( $\emptyset$ )

# Middle East Shuttles



# Asia Shuttles (1/2)

Preliminary



## KEY FACTS

**12** shuttles

**18** ports

**33** vessels

**4.5 TTEU** Ø vessel size

**5** calls per shuttle (Ø)



# Asia Shuttles (2/2)



## KEY FACTS

**12** shuttles

**18** ports

**33** vessels

**4.5 TTEU** Ø vessel size

**5** calls per shuttle (Ø)

# Asia Shuttles (1/2)



# Asia Shuttles (2/2)



FOLLOW OUR STORY



**Thank you for your attention!**



# DISCLAIMER

## Disclaimer

This presentation contains forward-looking statements that involve a number of risks and uncertainties. Such statements are based on a number of assumptions, estimates, projections or plans that, by their nature, are subject to significant risks, uncertainties and contingencies. Actual results may differ materially from the Companies' forward-looking statements and expected results.