

AIR & OCEAN MARKET UPDATE



 Expeditors®

INTRODUÇÕES



Talita Gritti

Air Product Manager,
Campinas



Vanessa Zollar

Manager, Ocean
Business Development,
Brazil



CONTEXTO MUNDIAL – 2025

GEOPOLÍTICA

- Mar Vermelho
- Tarifas – US
- Rússia x Ucrânia
- Oriente Médio
- Guerras Tarifárias
 - Eleições

OFERTA & DEMANDA

- Desaceleração Econômica
- E-Commerce
- Frota dos Armadores
- Atraso na produção de Aeronaves
- Mudanças no comportamento do consumidor

CLIMA

- Chuvas e Tufões
- Seca de Manaus

QUESTÕES TRABALHISTAS

- Greve – Rotterdam
- *Shutdown* - US

AIR



CARGUEIRO X PASSAGEIRO



Main Deck

317 x 244 x 244 cm

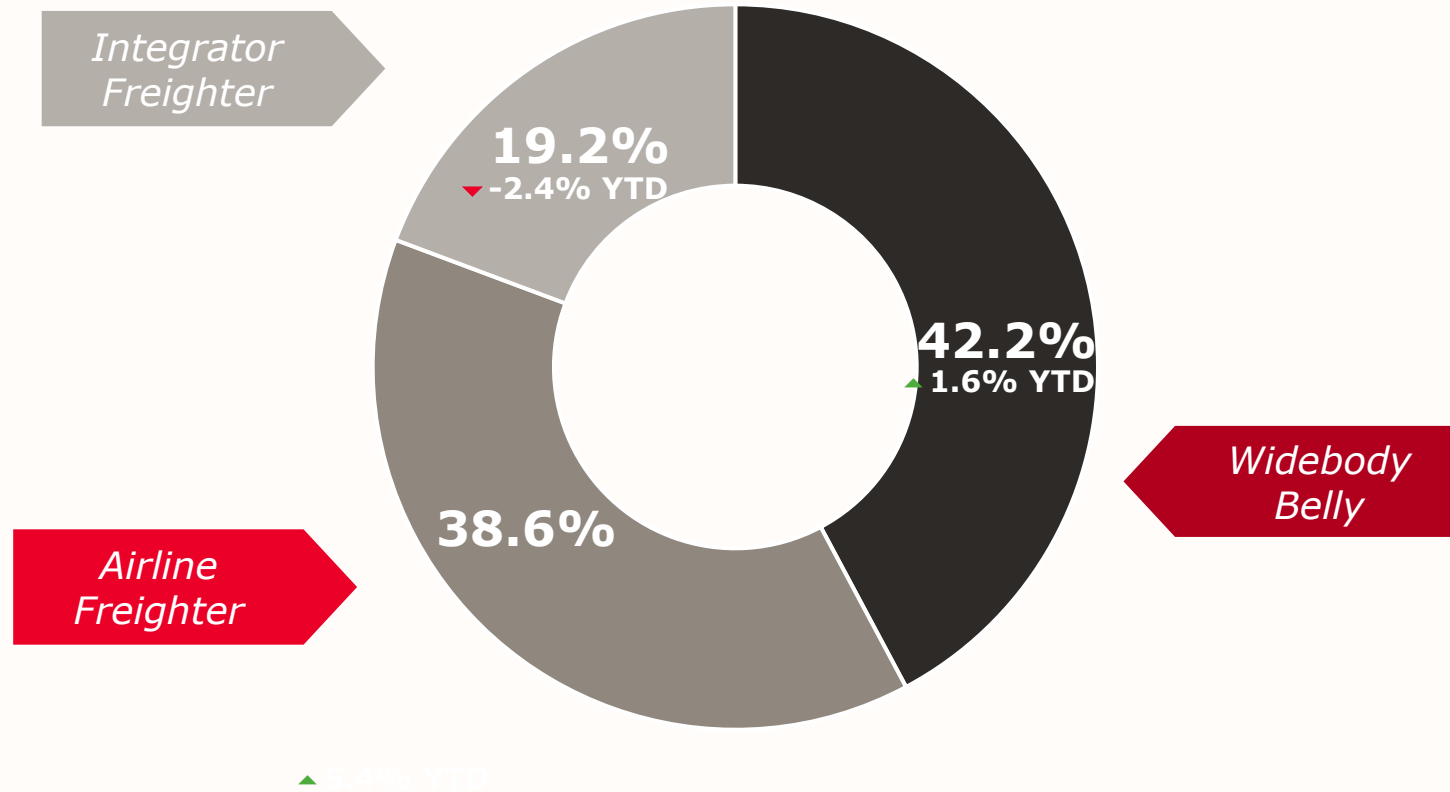


Lower Deck

300 x 200 x 160 cm

FROTA GLOBAL

Por
tonelagem



Source: Accenture
YTD: Jan-July



MERCADO AÉREO POR REGIÃO

North America-Latam

Latam-Latam & Latam-Globe

Europe-Latam

Mair-Latam

North Asia-Americas

South Asia-Americas

DESTINATION REGION ↑ ↓	Region	Demand & Capacity
	AMERICAS	✓
	LATAM	✓
	EUROPE	!
	MAIR	!
	NORTH ASIA	✓
	SOUTH ASIA	!



Demand has exceeded available capacity



Demand is higher and/or capacity is limited



Demand and capacity at normal levels



OCEAN



ARMADORES

FROTA ARMADOR

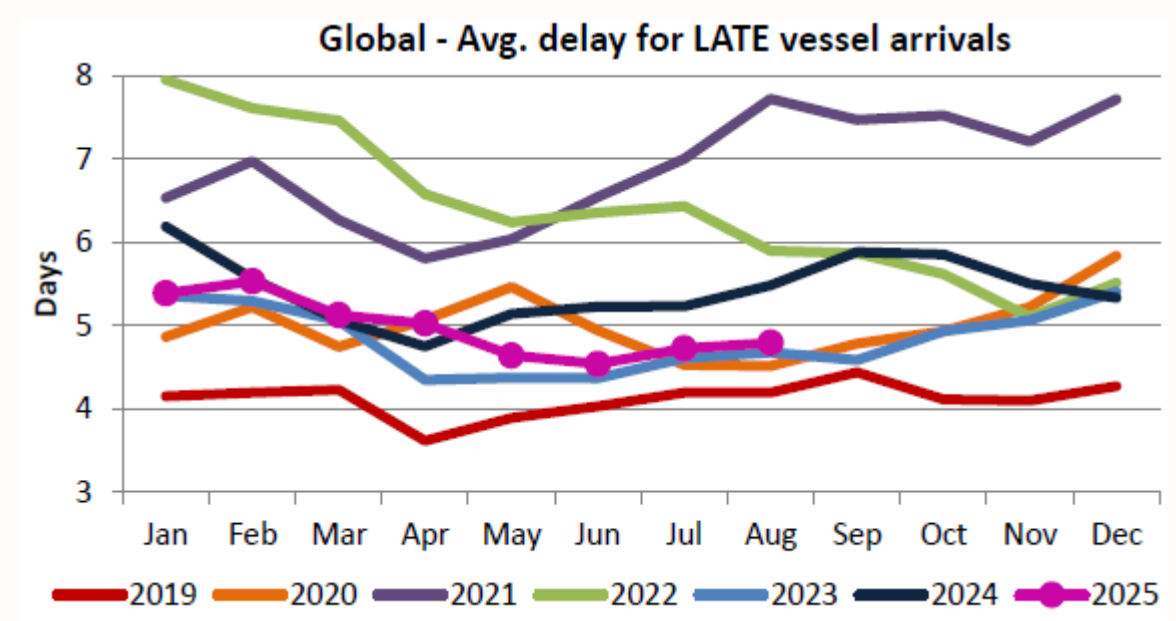
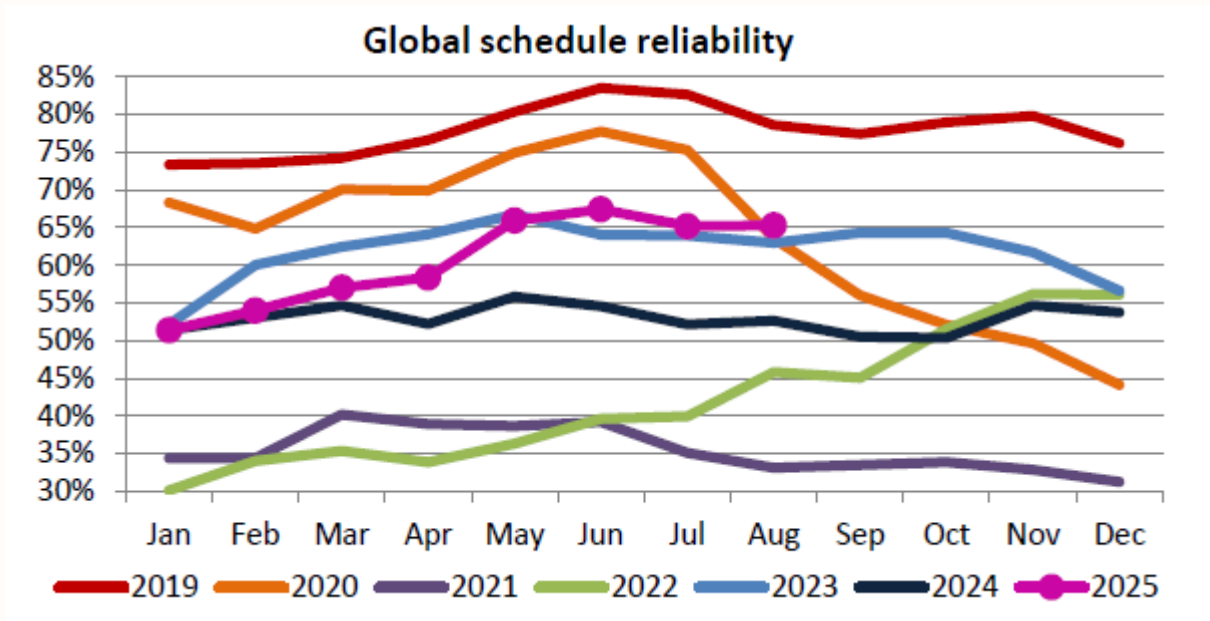
 4,7%

ALIANÇA ARMADORES

Premier Alliance	Gemini Cooperation	Ocean Alliance	Standalone Carriers
HMM ONE YANG MING	HAPAG-LLOYD MAERSK	CMA CGM COSCO GROUP EVERGREEN	MSC



SCHEDULE RELIABILITY



Source: Sea Intelligence



ESG



MARCO NET-ZERO



PROPOSTA

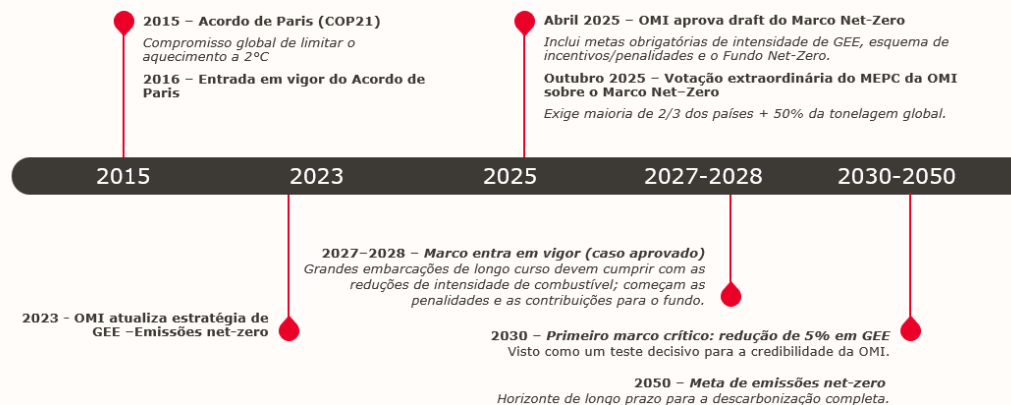


IMPACTO GLOBAL



IMPACTO BRASIL

LINHA DO TEMPO



SANTOS - TERMINAIS

HIGHLIGHTS

LEILÃO STS 10

RENOVAÇÃO DP
WORLD

CAPACIDADE TERMINAIS

SEMANA 42

Santos Brasil

100%

DP World

68%

BTP

86%



OBRIGADA



Talita Gritti

Air Product Manager,
Campinas

Direct 19 2101-0741
Mobile 19 97403-0508
talita.gritti@expeditors.com



Vanessa Zollar

Manager, Ocean Business
Development, Brazil

Direct 11 5054 4581
Mobile 11 9 8931 7955
vanessa.zollar@expeditors.com



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