

AIR & OCEAN MARKET UPDATE



Expeditors®

INTRODUCÕES



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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

$317 \times 244 \times 244 \text{ cm}$

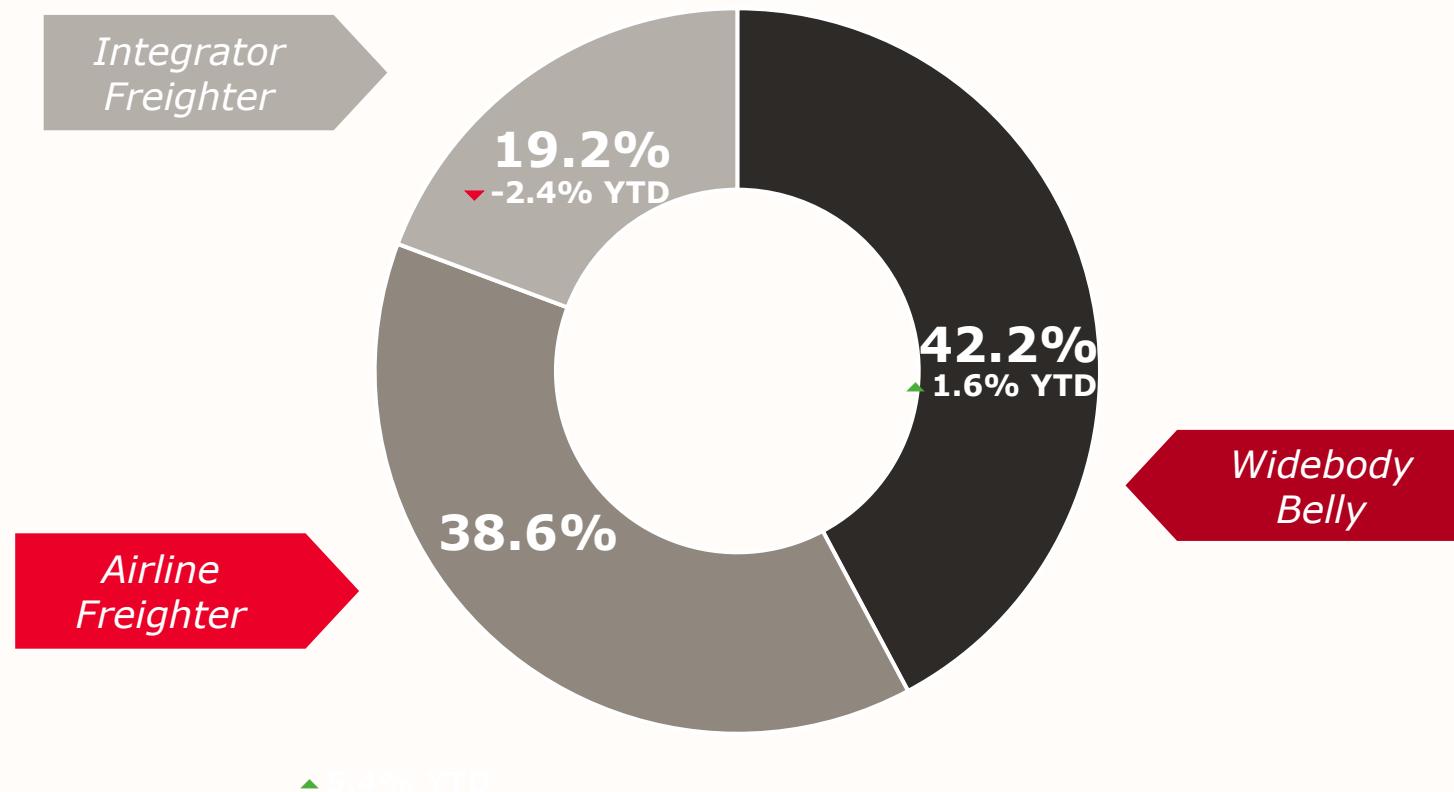


Lower Deck

$300 \times 200 \times 160 \text{ cm}$

FROTA GLOBAL

Por
tonelagem



Source: Accenture
YTD: Jan-July

MERCADO AÉREO POR REGIÃO

7

↑ 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

North America-Latam

Latam-Latam & Latam-Globe

Europe-Latam

Mair-Latam

North Asia-Americas

South Asia-Americas

OCEAN



ARMADORES

FROTA ARMADOR

↑ 4,7%

ALIANÇA ARMADORES

Premier Alliance

HMM
ONE
YANG MING

Gemini Cooperation

HAPAG-LLOYD
MAERSK

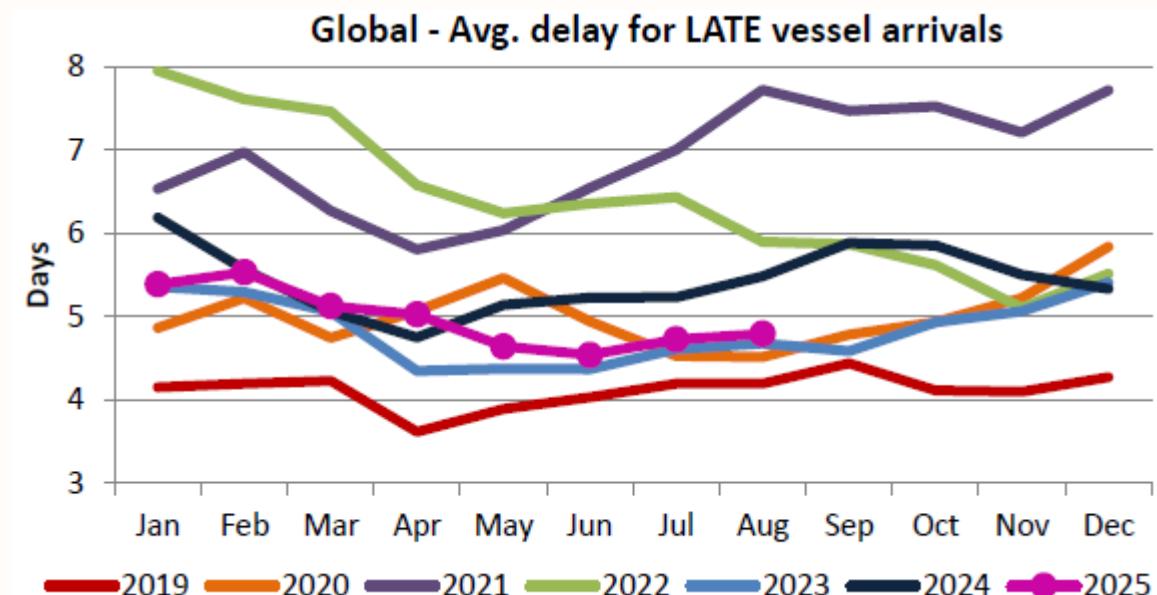
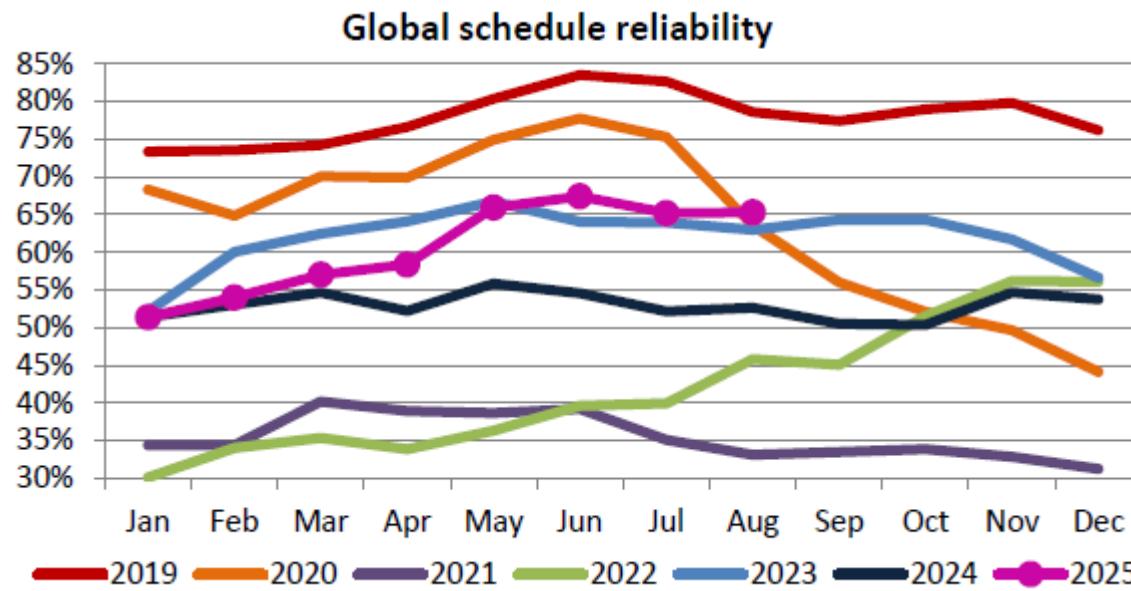
Ocean Alliance

CMA CGM
COSCO GROUP
EVERGREEN

Standalone Carriers

MSC

SCHEDULE RELIABILITY



Source: Sea Intelligence

ESG



MARCO NET-ZERO



PROPOSTA

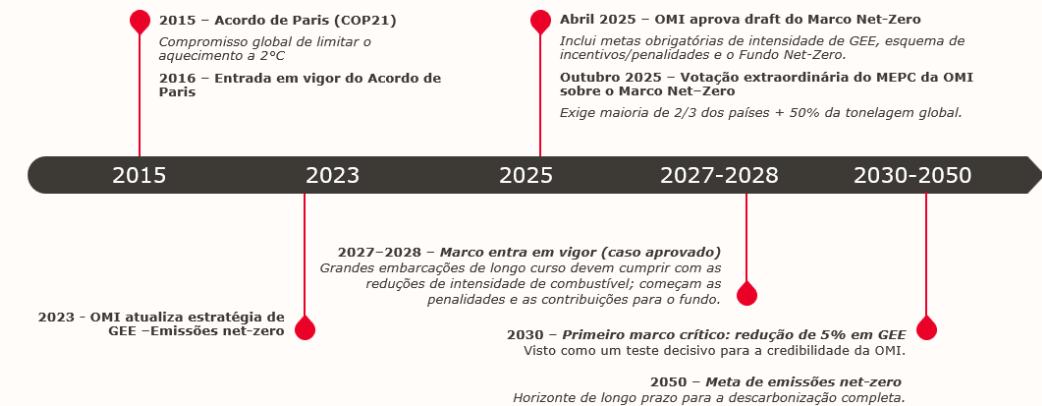


**IMPACTO
GLOBAL**



**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



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