OVERVIEW

• SUSTAINABILITY - INNOVATION AND EFFICIENCY
• MSC TECHNOLOGY IN CONTAINER SHIPPING
• GROUP DIVERSITY

• MEGAMAX VESSELS (MMX-24) – A NEW BREED OF SHIPS
• CONTINUED INDUSTRY CONSOLIDATION
• IMO 2020 SULPHUR FUEL CAP
• MSC CRUISES

• QUESTION TIME

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CARGO DIVISION

- 520 vessels
- 200 routes
- 500 ports of call
- 62 terminals
- 21 million TEU carried annually
- 493 offices
- 155 countries
- 47,000 staff

PASSENGER DIVISION

- By the end of October 2019, 17 ultra-modern, highly innovative and elegantly designed ships
- 2.4 million guests and 170 nationalities welcomed on board in 2018
- 81 countries in which MSC Cruises holidays are sold
- 212 itineraries offered worldwide
- Over 190 ports of call
- Over 3,845 port calls
- 30,523 employees on board and ashore
PROMOTING A SUSTAINABLE USE OF THE SEA AND MARINE RESOURCES

MSC invests in:

- Innovative and latest available low-carbon technologies
- Energy efficiency
- Operational efficiency
A UNIQUE WORLDWIDE PRESENCE
In January 2015: **MSC Oscar**, the largest ever built vessel:
- 395.4 m long & 59 m wide
- Capacity of 19,224 TEU

2015-2017: Delivery of **20 ‘Oscar Class’ vessels**

In October 2017, MSC confirmed the order of **11 x 23,000 TEU container ships** that will lead the way in terms of global standards for design and energy efficiency. These ships will be delivered as of 2019.
WORLDS LARGEST CONTAINER VESSEL – MSC GULSUN

Launched: July 2019
Length: 400m
Width: 61.5m
Weight: 224,983 ton
Intake Capacity: 23,756 TEU
Reefer Capacity: 2,024 plugs

MSC has ordered 11 vessels of this size for delivery (MMX-24).

Operate on Europe – Asia trade lanes.
MSC GULSUN - FACTS AND FIGURES

TO TRANSPORT 23,756 TEU YOU NEED

- 1,358 \text{ MILLIONrowave Ovens}
- 44 \text{ MILLIONLong Trains}
- 14,072 \text{ MILLIONHeavy Trucks}
- 8.35 \text{ MILLIONMicrowave Ovens}
- 2.94 \text{ MILLIONWashing Machines}
- 386 \text{ MILLIONPairs of Shoes}
- 8 \text{ MILLIONSolar Panels}

IN A SINGLE VOYAGE MSC GÜLSÜN CAN CARRY

- 2.37 \text{ MILLIONCar Tyres}
- 223 \text{ MILLIONBananas}
- 47,512 \text{ MILLIONCars}

IMPRESSIVE DIMENSIONS

- 61.5m x 399.9m MSC GULSUN
- 4x (60m x 100m) 4x Football Fields
- 381m EMPIRE STATE BUILDING
- 324m EIFFEL TOWER

A NEW CLASS OF SUSTAINABLE CONTAINER SHIPPING

- THE LOWEST CARBON FOOTPRINT BY DESIGN
- 7.49 CO₂ EMISSION IN GRAMS PER TRANSPORT WORK
- CO₂ EMITTED PER TRANSPORT WORK
- 48% MORE EFFICIENT
- UN/IMO APPROVED HYBRID EXHAUST GAS CLEANING SYSTEM (EGCS) INSTALLED

Sensitivity: Public
SHIPPING INDUSTRY CONSOLIDATION
JUST SEVEN OPERATORS WILL CONTROL NEARLY 90% OF GLOBAL TRADE

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IMO 2020 – SULPHUR FUEL CAP

• New emission control regulations effective 01 Jan 2020.

• Aim to reduce SOx released into the atmosphere, all lines to comply.

• MSC is investing in both low sulphur fuel alternatives (0.5%) and vessel scrubbers.

• Added costs to lines – estimates approx USD 15 Billion across the industry for BRC.
Following considerable analysis of operating costs and market factors we have decided to implement a new BRC (Bunker Recovery Charge), effective 1 January 2019.

For reefer cargo, the BRC will be calculated as BRC x 1.5, due to the additional cost of electricity generation used to power reefer containers.
MSC TECHNOLOGY IN CONTAINER SHIPPING

• **TRAXENS** – Smart Containers. Real time container data direct to shippers.

• Smart containers is a standard container permanently fitted with electronics which transmit data (position, temp, movement, shocks, door opening, humidity ...) in near real-time.

• Identify and implement concrete operational improvements in supply chain to generate cost reductions.

• Visibility provides peace of mind and improves user experience for shipping customers.
• **TRADELENS** - Blockchain Technology aimed to limit shippers costly paper trail (up to 20% of costs). 5 of the 6 largest carriers have committed to this platform, equating to over 50% of global container trade.

• **Digital Container Shipping Association (DCSA)** - Established in April 2019 by MSC, Maersk, Hapag Lloyd and ONE focusing on **INTEROPERABILITY** and working towards creating global industry standards in shipping. 5 other carriers have since joined.

First Industry Blueprint (IBP 1.0) published by DCSA recently on non-commercial processes in shipping.
KEY NUMBERS
• 5,000 trucks
• 10,000 trailers
• 4,000 rail wagons
• 68 locomotives
• 18 barges

DRY PORTS
• 138 operating yards
• 6.8 million sqm
• 650,000 TEU (capacity)
• 10 million TEU moved
• Over 600 container lifting equipment
• Over 40 warehouses (incl. refrigerated)
• 1,200 generator sets
NUMBER 1 CRUISE LINE IN EUROPE, SOUTH AFRICA, SOUTH AMERICA AND THE GULF

• 800% growth in its first 10 years
• By the end of October 2019, 17 ultra-modern, highly innovative and elegantly designed ships
• €13.6 billion investment plan: the fleet is set to expand to 29 cruise ships by 2027
• Capacity to reach over 5.5 million passengers annually by 2027

www.msc cruises.com
AROUND THE WORLD WITH MSC CRUISES

81 COUNTRIES visited
212 ITINERARIES
OVER 3,845 PORT CALLS

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OUR HISTORY
OUR PEOPLE
OUR FAMILY

TOGETHER,
WE ARE MSC.

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