EMPIRICAL EVIDENCE FOR INTEGRATION AND DISINTEGRATION OF MARITIME SHIPPING, PORT AND LOGISTICS ACTIVITIES

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Round table on
Vertical Relations between Transport and Logistics Businesses
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Containerisation and integration processes

• From a segmented to an integrated system
  – Containerisation and logistics opportunities
  – Vertical and/or horizontal integration scenarios

• Observation
  – Strong horizontal integration dynamic
  – Limited vertical integration
Logistics?

• Logistics activities
  Shipping lines < logistics operators

• What does the term « logistics » mean to maritime groups?
  Three types of logistics
Striking a balance between the three types of logistics

Vessel logistics
- to fill the ship
- to minimise the number of ports of call
- to minimise the turnaround time at the port
- to reduce the total shipping costs per TEU
- to secure terminal handling operations

Container logistics
- to accelerate the turnover of the containers
- to optimise the relocation of containers in ports
- to allocate containers to clients at the right place and the right time

Freight logistics
- To minimise the total transport cost
- Door-to-door services: inland services carrier haulage
- To offer a global transport network
- To avoid cut-throat competition with forwarding agents

Normal print: Response of shipping lines to meet the needs of shippers
Italic: Response of shipping lines to reduce costs
Bold and italic: both

Core business
Concentration mechanisms

• Spatial concentration
  – Overall stability of the distribution of traffic
  – shipping line concentration = Setting up of dedicated hubs

• Role of the port authorities
  – Ensuring competition among various players
Thank you for your attention