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CTS PRESENTATION
TPM Asia 2013 Conference





TPM Asia 2013 Conference

Asia - Europe Imports Jan 2011- Jul 2013

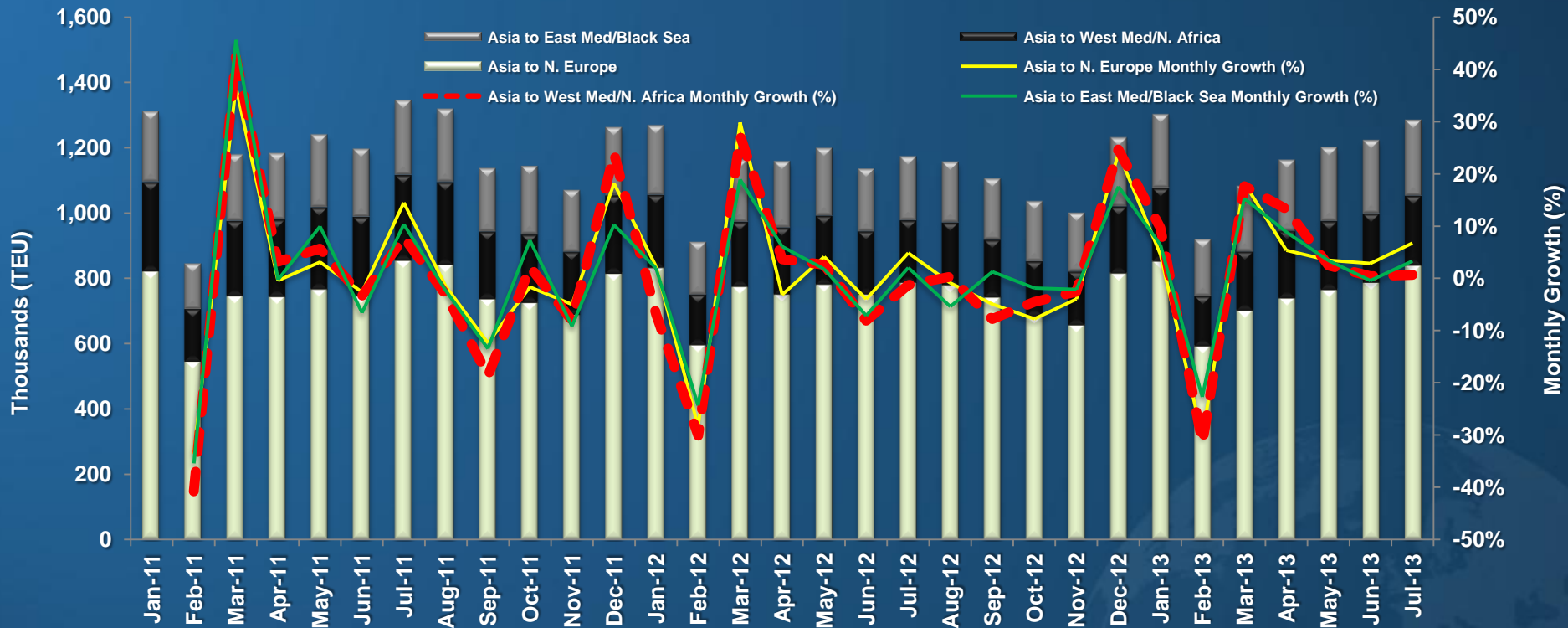


- Asia – Europe Imports totalled 14,211,500 TEU in 2011
- Asia – Europe Imports totalled 13,521,900 TEU in 2012 – a drop of 5%
- Asia – Europe Imports in 1H 2013 are up 1% vs. 1H 2012



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Asia - Europe Imports Jan 2011 - Jul 2013

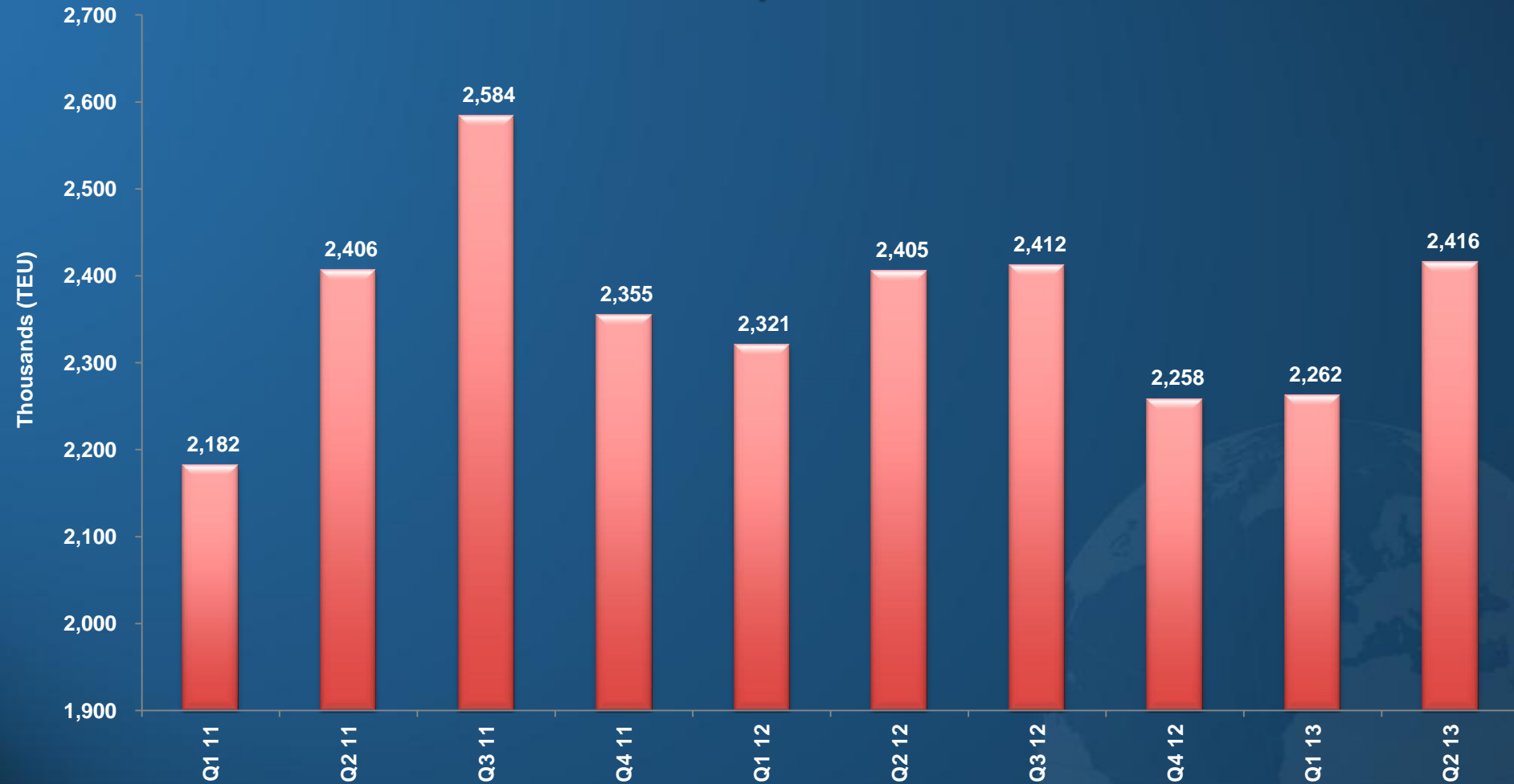


- ❑ Asia-N. Europe exports dropped 1% y-o-y (2012 vs. 2011)
- ❑ Asia-East Med/Black Sea exports dropped 6% y-o-y
- ❑ Asia-West Med/N. Africa exports dropped 17% y-o-y



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Asia-Northern Europe: Q1 2011- Q2 2013





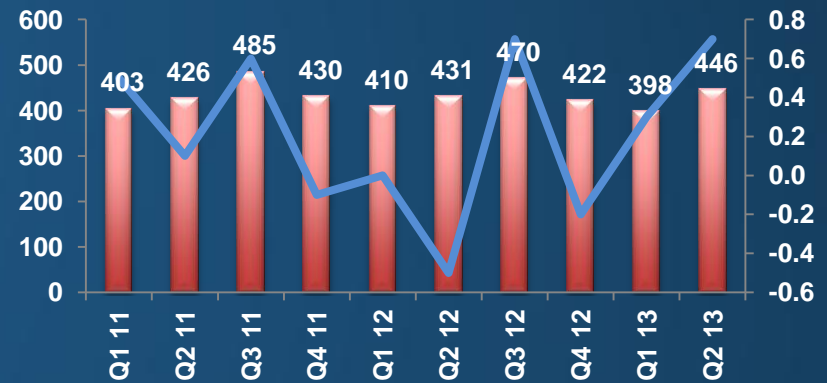
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Top 4 Import Countries: TEU Imports vs. Real GDP Growth

Germany



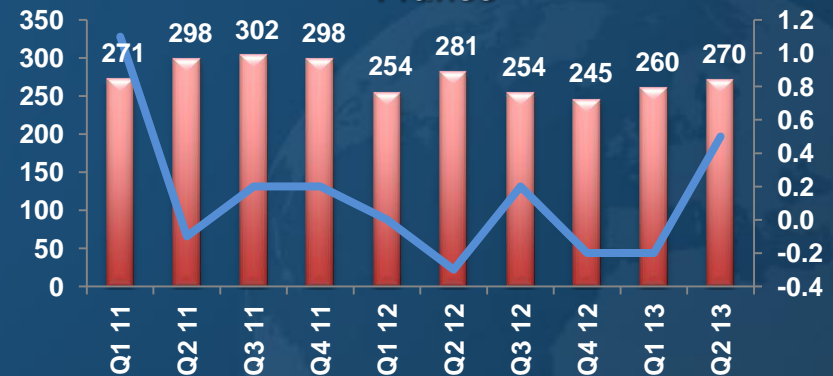
United Kingdom



Netherlands



France





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Asia-East Med & Black Sea: Q1 2011- Q2 2013

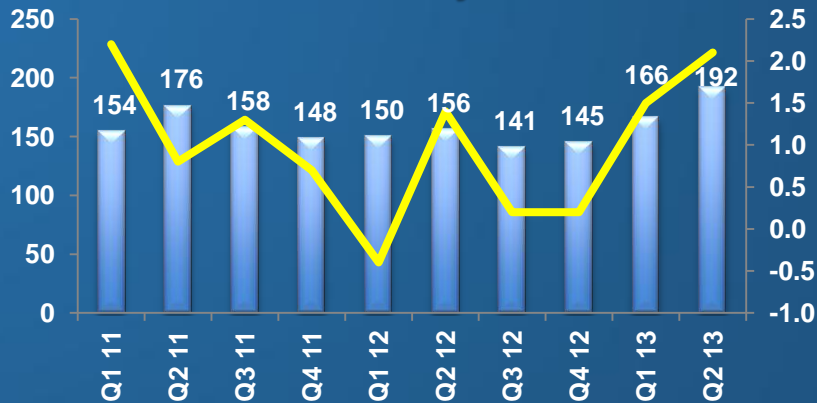




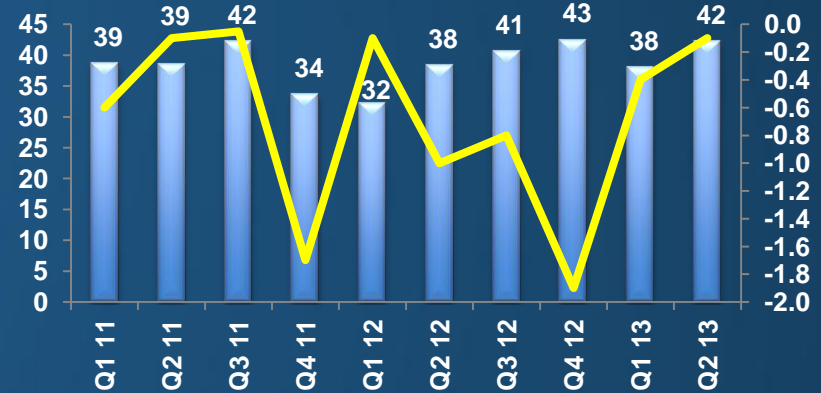
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Top 4 Import Countries: TEU Imports vs. Real GDP Growth

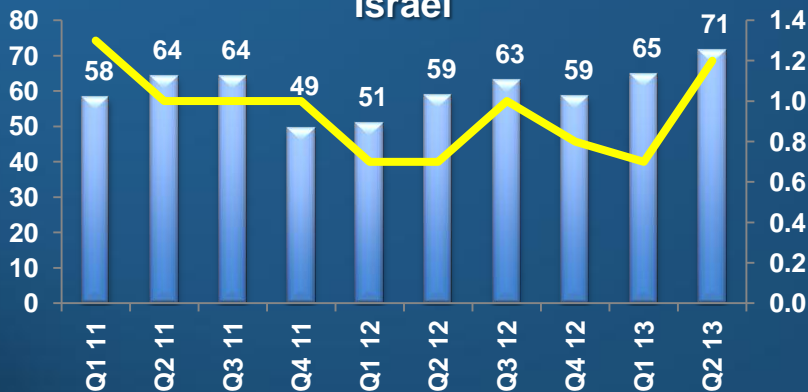
Turkey



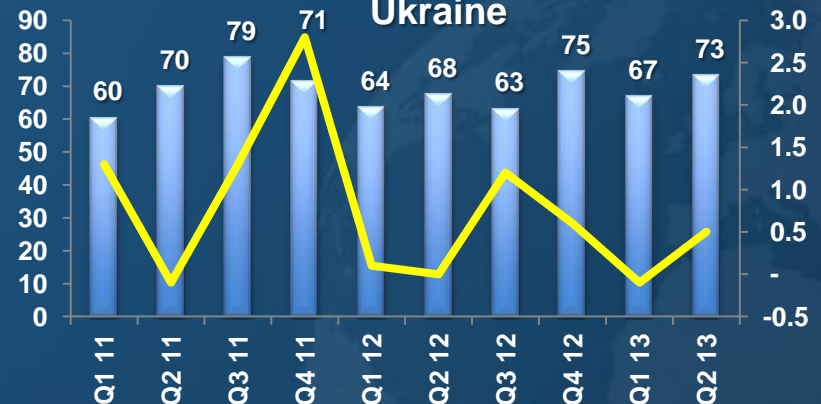
Greece



Israel



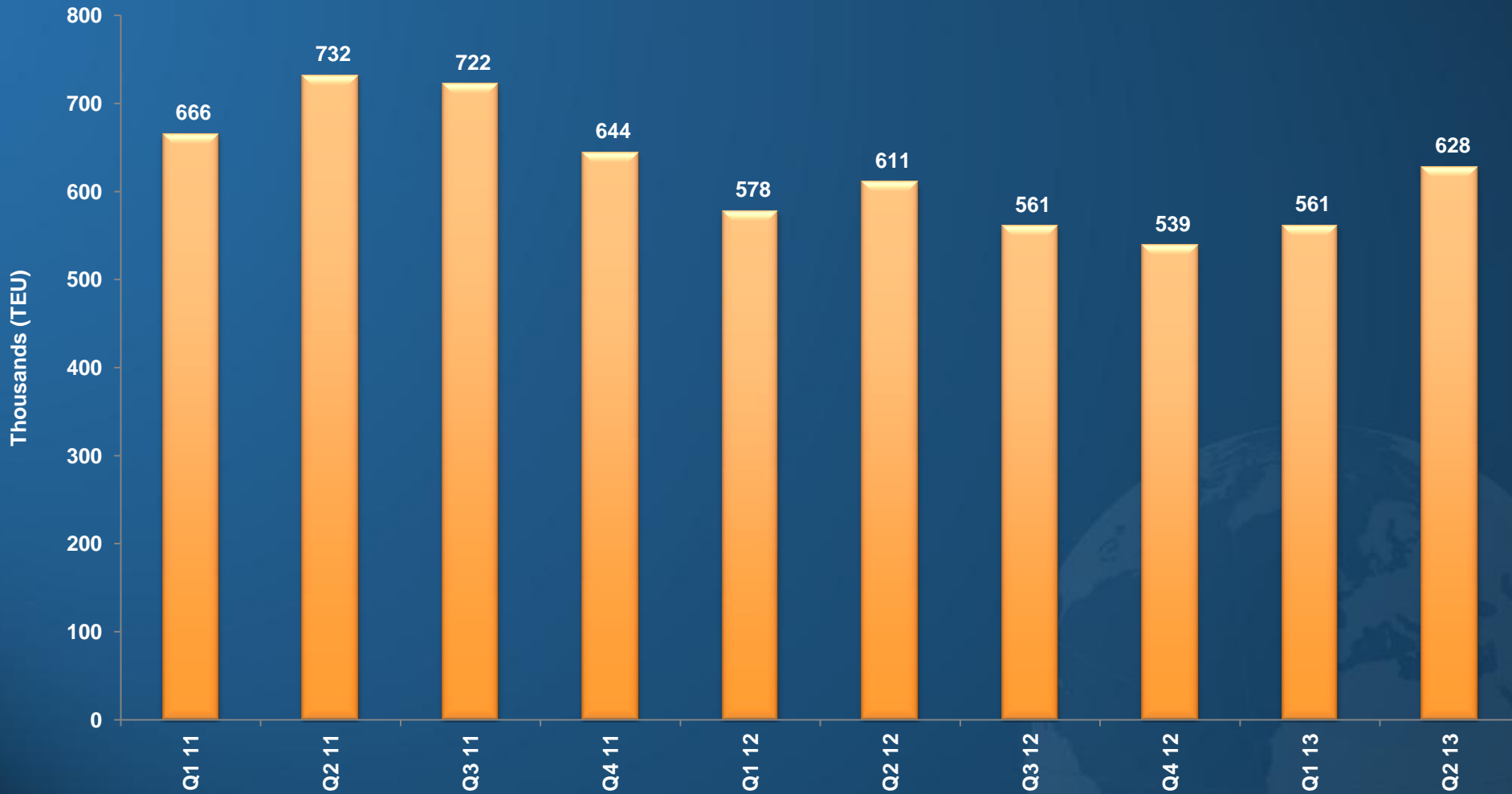
Ukraine





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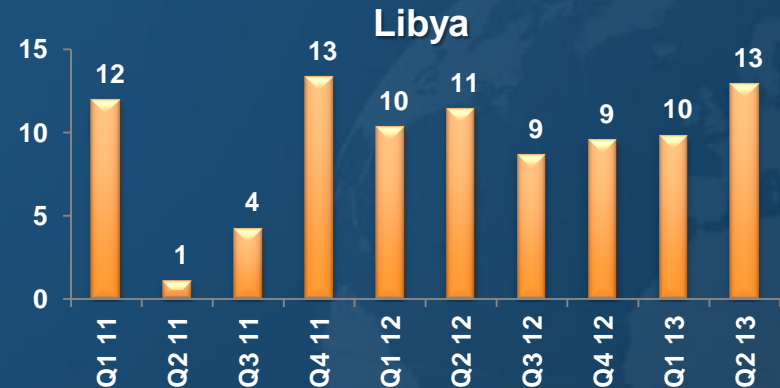
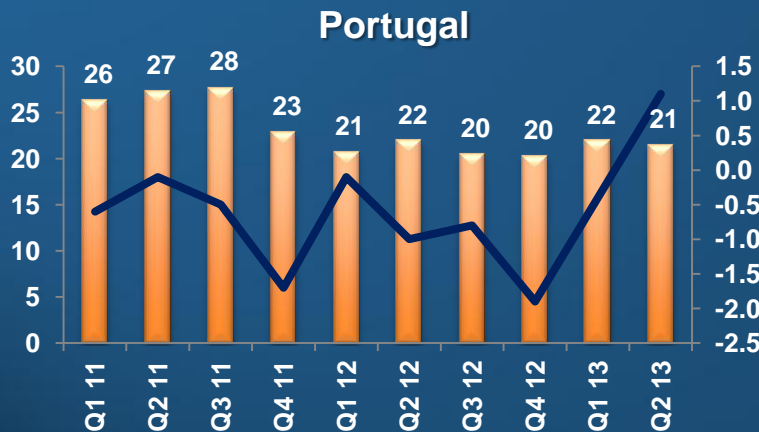
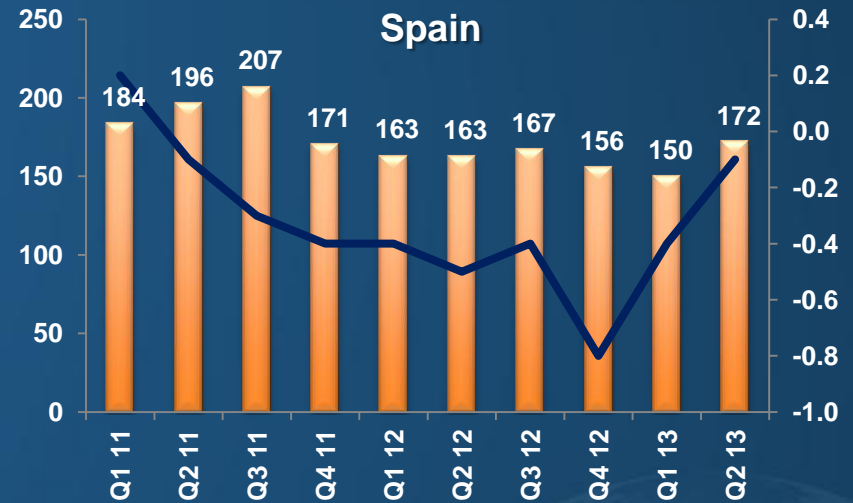
Asia-West Med & North Africa: Q1 2011- Q2 2013





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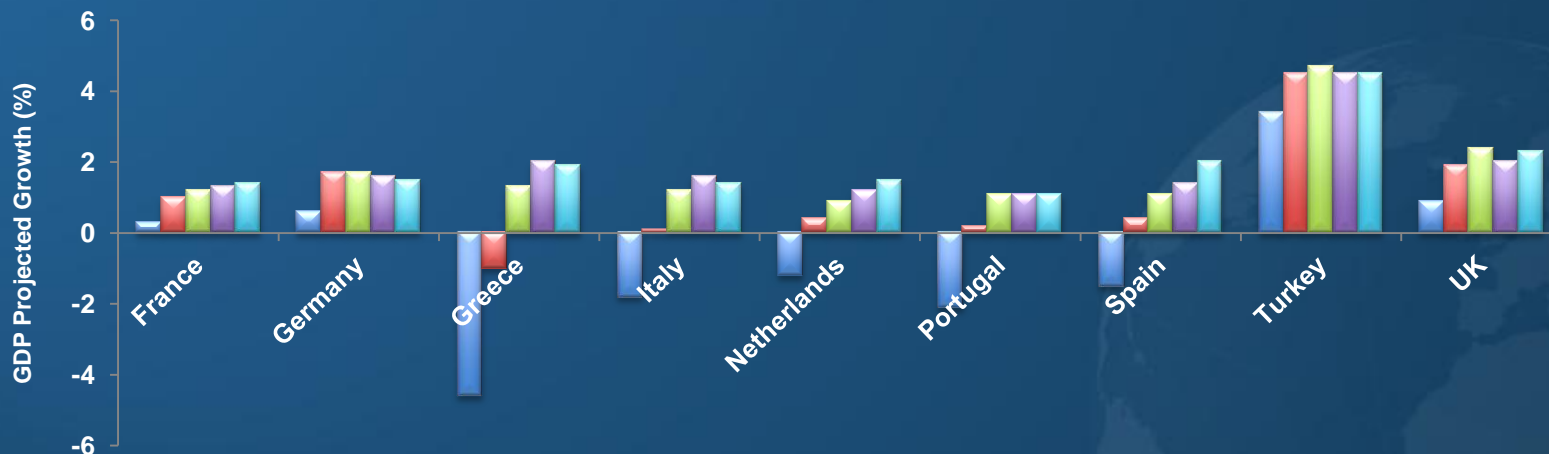
Top 4 Import Countries: TEU Imports vs. Real GDP Growth





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GDP Growth Forecasts	2013	2014	2015	2016	2017
France	0.3	1	1.2	1.3	1.4
Germany	0.6	1.7	1.7	1.6	1.5
Greece	-4.6	-1	1.3	2	1.9
Italy	-1.8	0.1	1.2	1.6	1.4
Netherlands	-1.2	0.4	0.9	1.2	1.5
Portugal	-2.1	0.2	1.1	1.1	1.1
Spain	-1.5	0.4	1.1	1.4	2.0
Turkey	3.4	4.5	4.7	4.5	4.5
UK	0.9	1.9	2.4	2.0	2.3

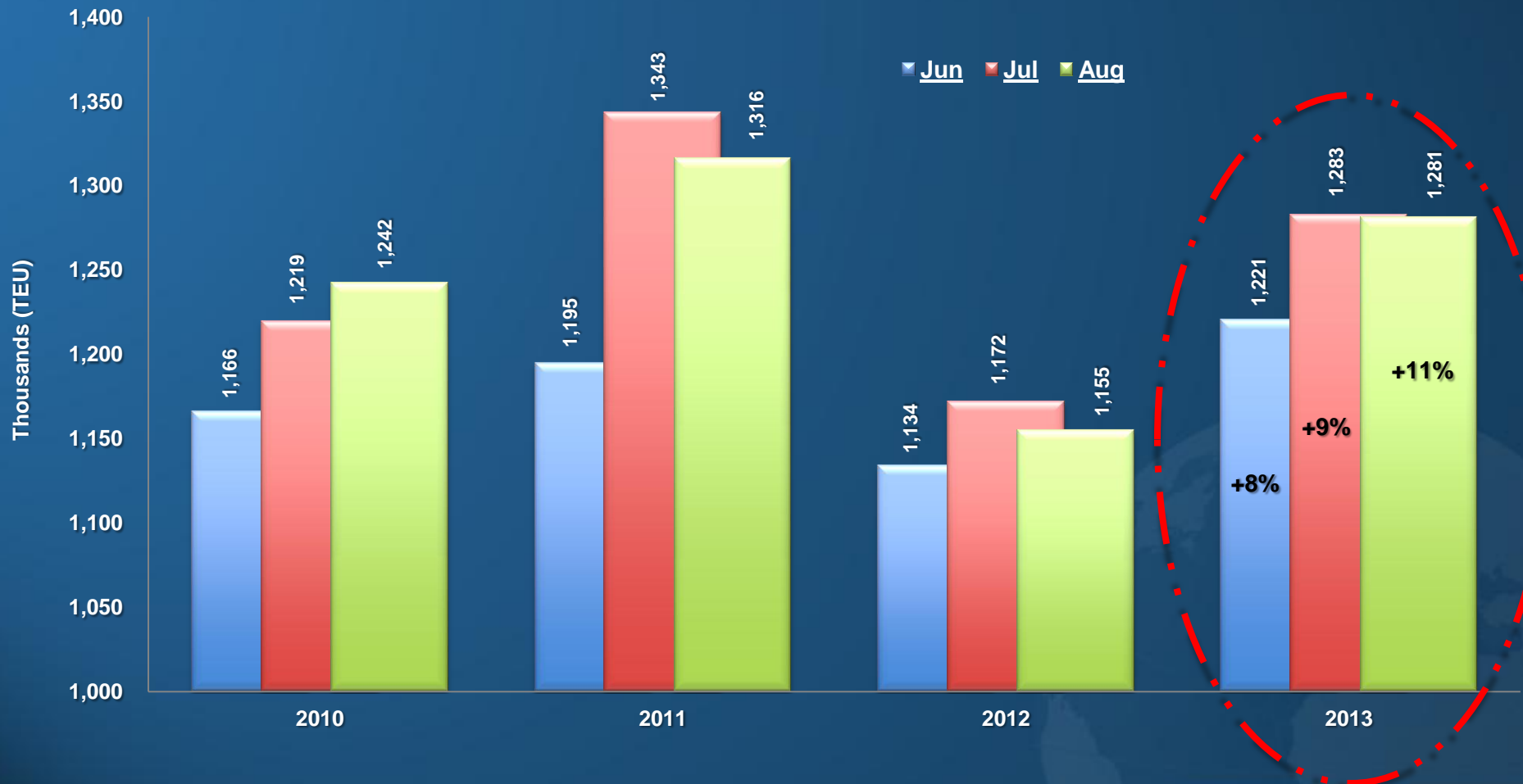


Source: IMF, British Chambers, Intelligence News, EY



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Asia-Europe "Peak Season" Annual Comparison





CONCLUSION

- ❑ Looking only at “Asia – Europe” is too simplistic.
- ❑ Volume declines into the Mediterranean are the major cause of the decline in overall volumes.
- ❑ With the exception of France the major North European economies are seeing volumes returning
- ❑ Even in the Med. volumes are improving with the exception of Ukraine
- ❑ Most sources show growth in 2014, with the exception of Greece.
- ❑ We are already seeing a “Peak Season”, and the outlook for 2014 is positive.



THANK YOU

Rod Riseborough – Chief Executive Officer , CTS