



CHILL - CHAIN

Cold - Freight - Innovation

Private & Confidential

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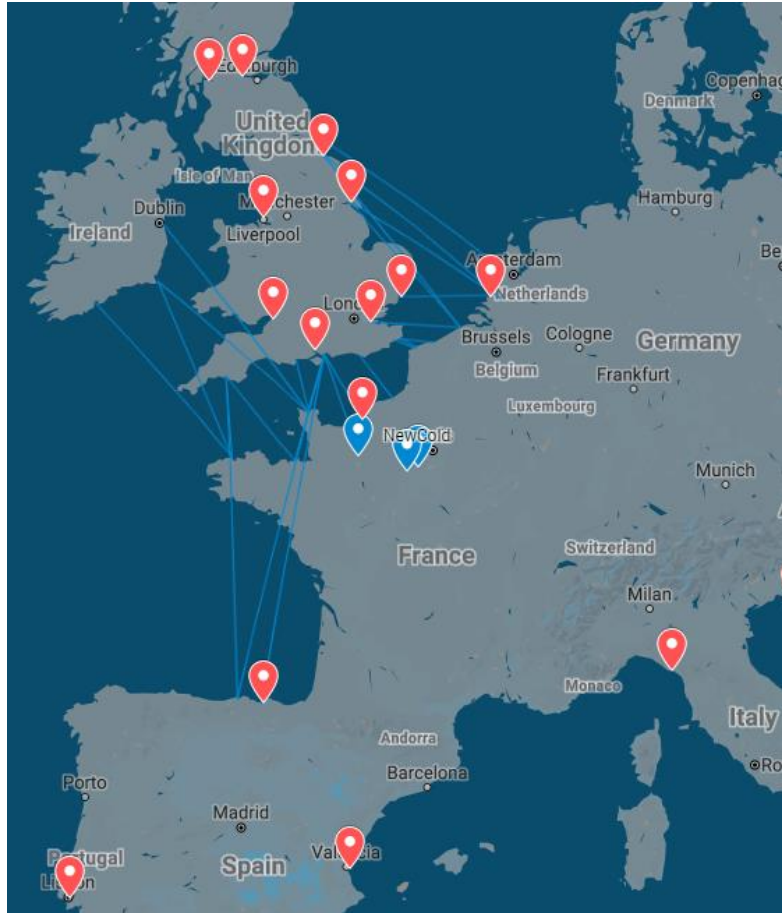
Short Sea Stories (Shanties)

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- Story 1 - Mon 20TEU arrive Hamburg bumped by Maersk, due into Gateway Wed, reqd by Sun, short sea routes unknown. Road options staffed.
- Story 2 – 25 TEUpw, Ice cream, Italian Short Sea an option, road legs uncompetitive, couldn't be unbundled.
- Story 3 – Iberian Brexit planning, short sea should be the go to mode for citrus SKUs. Uncertain lead times increase risk, uncompetitive end to end bundles.

Brexit risk mitigation

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- Reduced road capacity of Spanish road fleets is the key risk
- Blend volume across modes
- Alt channel crossings identified
- Live intelligence feeds
- Visibility of all movements reqd

Key messages

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- Poor route & sailings visibility
 - Understanding the Trans EU short sea options is time consuming
- Price visibility
 - End to End bundles uncompetitive, shipping lines stick to what you are good at
- Please stop telling investors end to end services increase margins and then tell customers they reduce prices. We do read both.