

Before joining Dynamar, I worked for more than 35 years in the liner shipping agency and forwarding industry in Amsterdam and Rotterdam. Over the years, I have been dealing with some 75 international liner-shipping companies: conventional operators, multipurpose, full container, deepsea and shortsea.

Looking back, I realise that Africa has been rather at the centre of a larger part of my earlier professional life as a liner shipping agent. Not all of you will remember or may even have heard of many of the following shipping companies (with a few exceptions for sure):

- CAMAfrica Liner Ltd
- Compagnie de Navigation Denis Frères (CNDF)
- Compagnie des Messageries Maritimes
- Compagnie Maritime Belge (CMB)
- Compagnie Maritime Marfret
- DAL - Deutsche Afrika-Linien
- DECO Line
- Delmas
- Deutsche Ost-Afrika Linien (DOAL)
- East Africa National Shipping Lines (EANS�)
- Ferrymar
- Flamar
- H. Stinnes Linien
- Multi Services Maritimes (MSM)
- Nouvelle Compagnie Havraise & Péninsulaire (NCHP)
- Nigerian National Shipping Line (NNSL)
- Oldenburg Portugiesische Dampfschiffs-Rhederei (OPDR)
- Safmarine
- Samatour Shipping Company
- Services Commun d'Armements desservant l'Afrique Occidentale (SCADOA)
- Scandinavian East Africa Lines (SEAL)
- Société National Malgache des Transports Maritimes (SNMTM)
- Société Ivoirienne des Transports Maritimes (SITRAM)
- Société Navale de l'Ouest (SNO)
- Sudan Shipping Lines
- Votra Line (Umao)
- West-Afrika Linien-Dienste (WAL)
- Woermann Linie

The above carriers all have in common that they served or still serve Africa (North, West, South and East) from Europe.

In 1960, I joined my first employer, a small Amsterdam-based liner agent who was the representative of the big French state-owned liner carriers Compagnie Générale Transatlantique and Compagnie des Messageries Maritimes - they ultimately became the CGM part of present CMA CGM. And in the North Europe-West Africa breakbulk trade of two Paris-based private shipping lines: Compagnie de Navigation Denis Frères (CNDF) and Société Navale de l'Ouest (SNO). The SNO ships all had "Saint" names, such as "Saint Luc", "Saint Louis" and "Saint Matthieu".

The latter was the first ocean vessel I ever boarded. By company-bicycle, I went to the customs office to have some documents validated which thereafter had to be delivered on board, some 15 kilometres from the office. The "Saint Mattieu" was moored at Amsterdamsch Haven Bedrijf (AHB), a stevedoring company at Sumatrakade in the former eastern port area, which nowadays is one of Amsterdam's most exclusive residential quarters.

When I was, out of breath biking, approaching the stevedoring facilities I started sniffing a sweet, somewhat faint odour. It got stronger the nearer I came and somewhat later on I understood it was the flavour of cocoa, the vessel's main cargo. Once on the quay, it was mixed with the smell of, amongst others, coffee and other produce, as well as wood: huge logs but also packages of sawn timber. Ever since, when such odours enter my nose they do remember me of (West) Africa - although I never have been there (up to now).

Since, the African continent has always kept my warm interest. Speaking at this conference is my actual first visit to Southern Africa and for that reason I am additionally grateful to Transport Events Management for having me invited to speak at this very interesting conference.

My presentation today will consist of two main parts:

- 1) An assessment of the "actual" global carriers, to be defined as those container liner shipping companies serving *all* East-West, and the *main* North-South routes
 - a. who are the "actual" global carriers
 - b. what is the size of their existing fleet and orderbook
 - c. how is the split by owned and chartered capacity
 - d. 10-year fleet, carryings and growth developments

- e. their mergers and takeovers history
 - f. main services grid of each “actual” global carrier
 - g. the impact of the forthcoming abolition of the conference system
 - h. reflections on the future
- 2) the main Southern Africa container trades
- a. Asia
 - b. Europe
 - c. the principal carriers
 - d. container capacity and trade shares
 - e. reefer plug capacity and liftings
 - f. main countries and ports in Asia and Europe involved in the Southern Africa container trades

A few words on Dynamar:

Founded in 1981, we are a, I may say prominent Shipping and Transport Information and Consultancy company.

- Our core activity is credit risk assessment, specialised in the maritime industry and particularly geared towards the container segment. There hardly is any German KG financed ship without a Dynamar rating on the prospective charterer.
- Marine Intelligence amongst others tracks and locates ships and cargoes, and helps our customers preventing and/or detecting fraud
- All the information gathered during our daily market scans and contacts with shipping companies, as well as our huge database form the basis of our consultancy activities
- Spearheaded by our weekly newsletter DynaLiners, we publish an increasing number of special reports on carriers, trades and shipping insight topics

Among these publications are two recently issued reports dealing with the Southern Africa trades:

- The North Europe/Mediterranean-Southern Africa Container Trade (August 2006)
- The Far East-South & West Africa Container Trade (December 2006)

A standard feature of our reports is that they are kept up-to-date during six months at least with a “Post Publication Developments” section.

I will be happy to make a .PDF file of the slides of this presentation available to all attendants of the 5th Intermodal AFRICA 2007 interested in it.