



Demand / Capacity

ATOSSCOM November 28, 2023

“

Reliability is enhanced by
making the complex simple

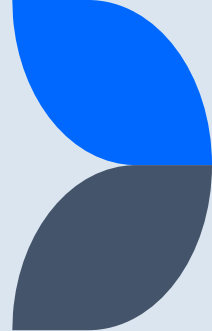
”

To start with,
it's anything *but* simple...

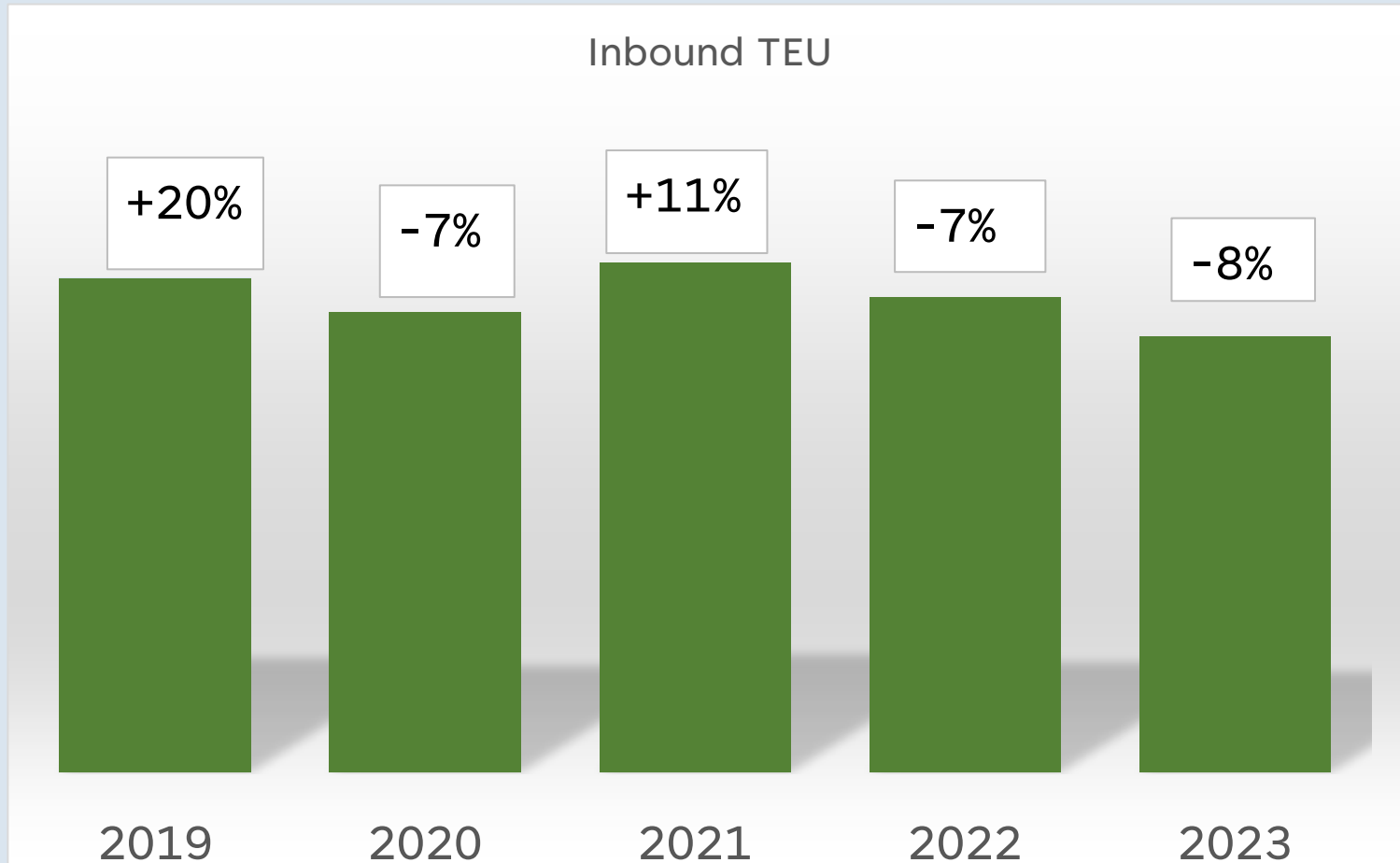




And we are really far...
 from USWC 5,100 – 7,000 miles
 and Asia 1,500 – 3,400 miles

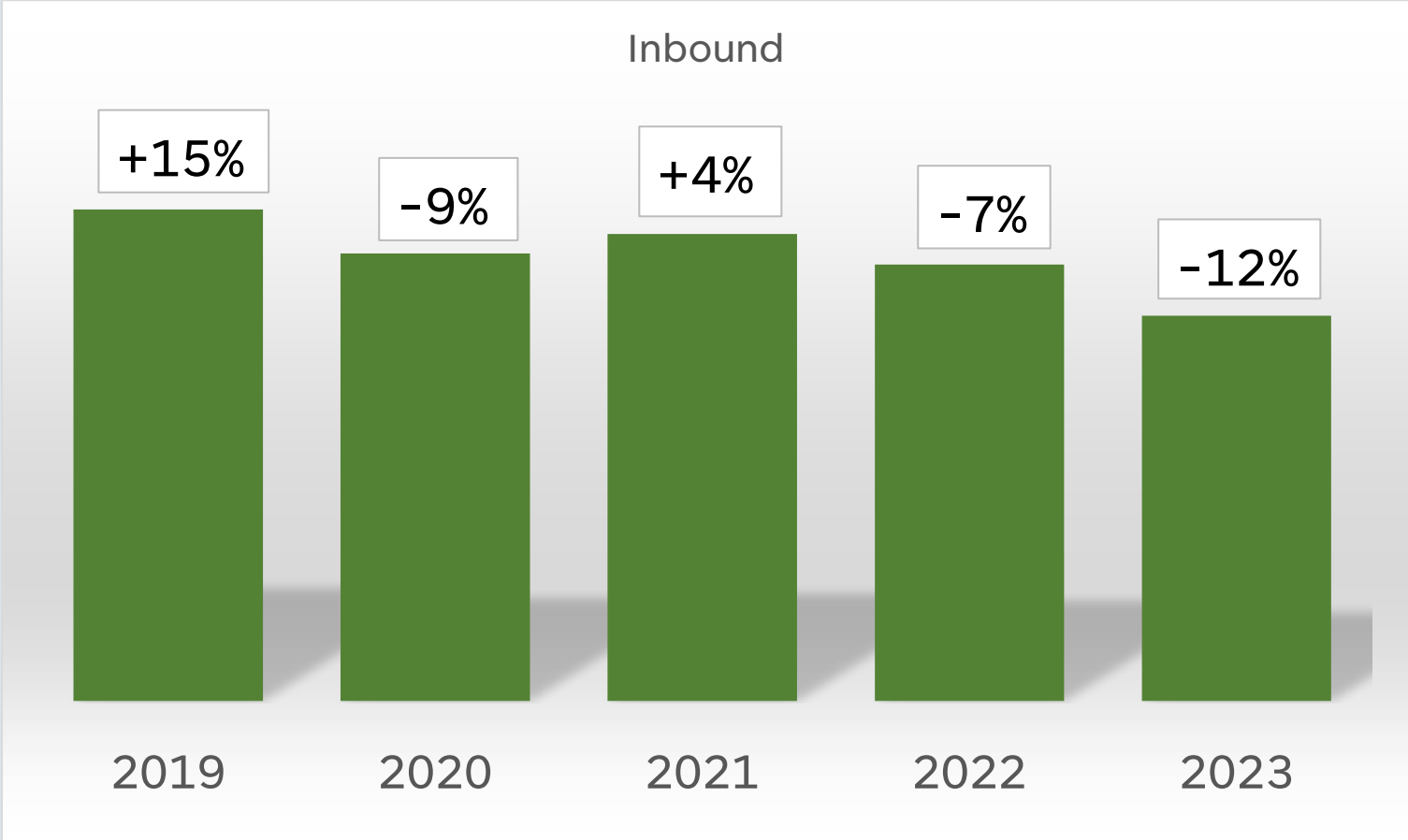
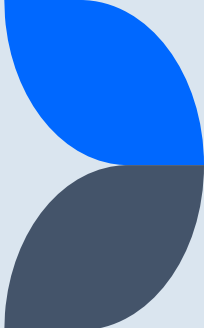


Container Demand (Micronesia)



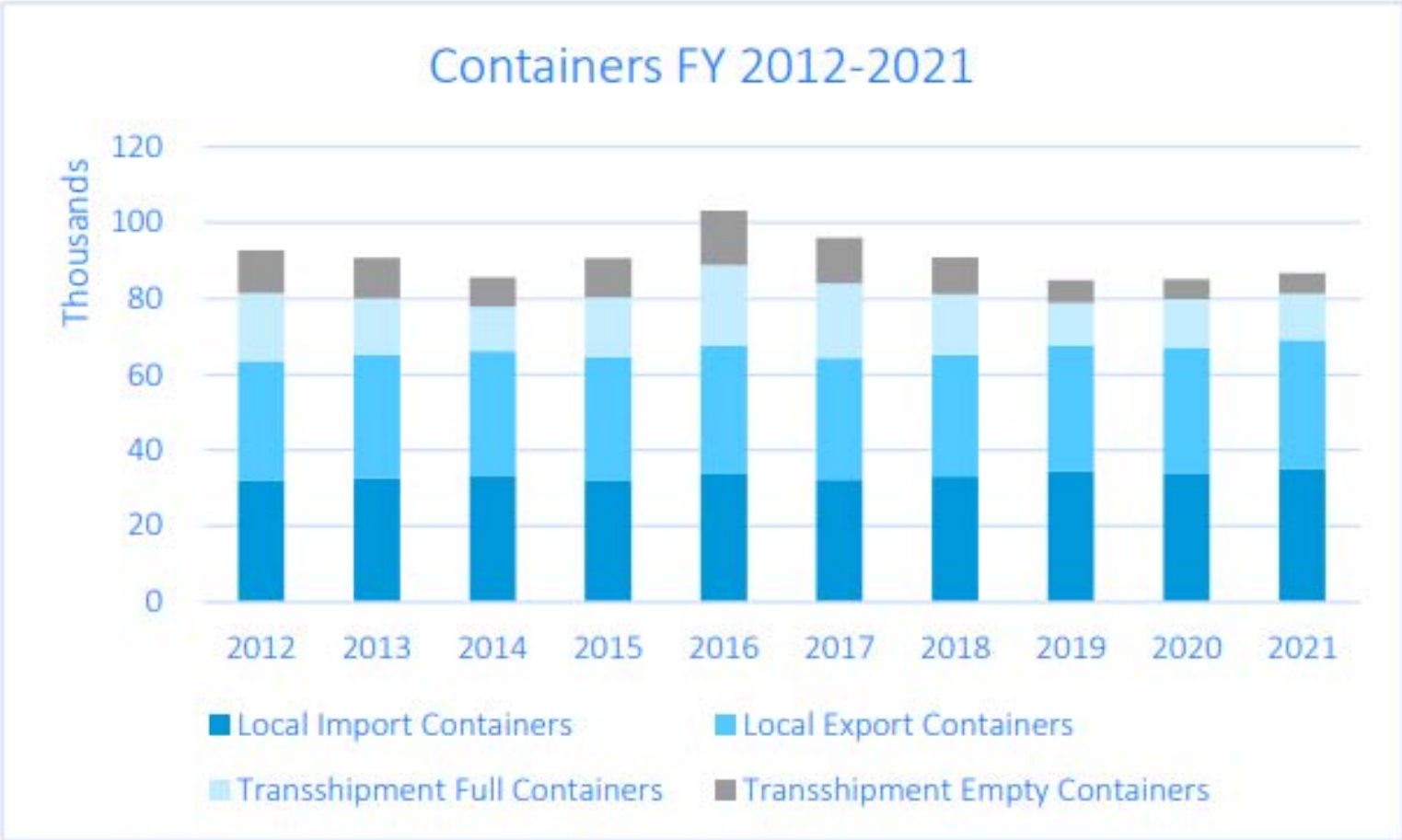
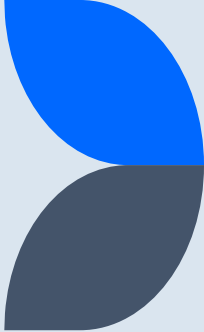
Source: Based on market assessments

Container Demand (CNMI)



Estimates based on market assessments

Container Demand (Guam)



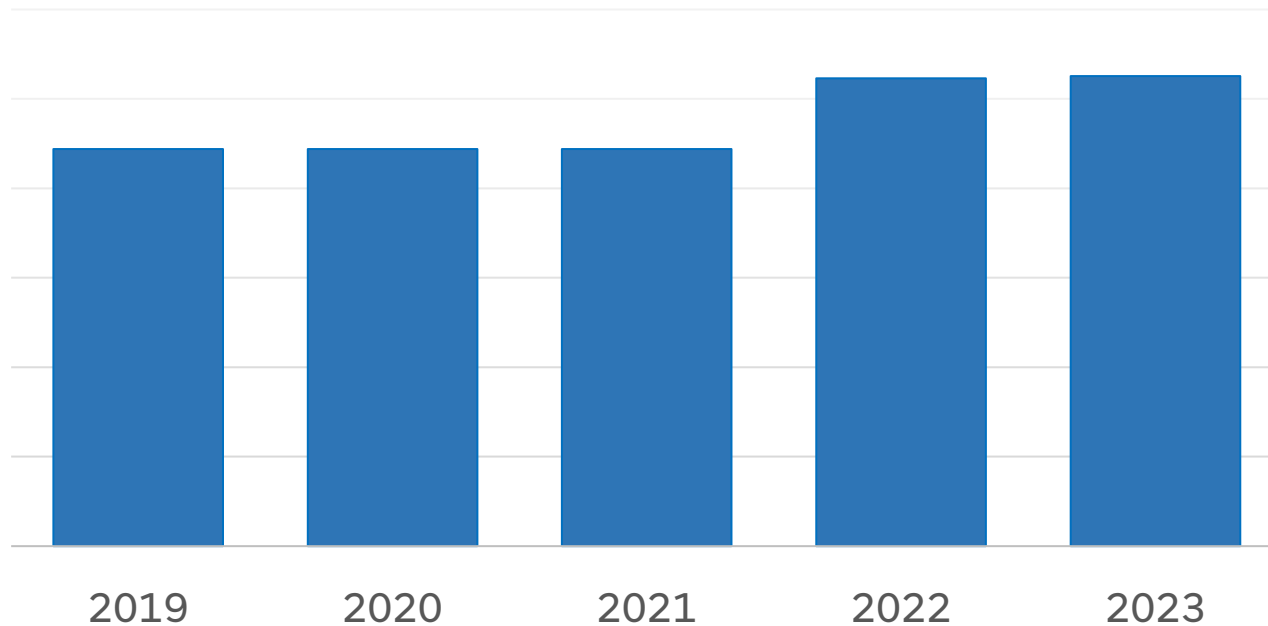
Source: WSP analysis. Data provided by the PAG

Future Demand Drivers

- Return of consumer spending
- Tourism/visitor arrivals
- Local Government infrastructure projects
- U.S. Department of Defense projects and activities

Ocean Carrier Capacity (Micronesia)

VESSEL GROSS TONNAGE (EST.)



Estimates based on market assessments



Ocean Carrier Capacity (additional)

Eagle



Pacific Condor



Kota Hening



Papa Mau



Kamokuiki

In addition to existing liner service in Micronesia market within last 24 months



Is capacity determined
solely by the vessels
serving the market?

Terminal Capacity

Productivity

Material handling equipment

Available labor

Capabilities

Berth space

Yard space

Shoreside Cranes?

Reefer outlets

Operational hours:
Night-time operations,
arrivals/departures

Tug / Pilot

Support

Training for maritime careers

Navigational aids

Security



Increasing Operating Costs

- Fuel
- Labor
- Terminal
- Equipment / parts
- Capital Investments

Summary

- Demand swings up and down
- Existing ocean carriers provided service through all cycles and can bring on additional capacity as needed
- Terminals assess ability to meet demand, productivity
- Operating costs continue to rise

Thank you