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## Crew change commitments are failing on the ground



MOST OF THE 13 countries committing to end the crew change crisis that has stranded more than 200,000 seafarers worldwide do not have immigration, travel or health procedures that easily facilitate their transfer.

Information collated by shipmanagers and port agents reveals five of these countries are being used more than others because their guidance allows crews to sign in and out of ships at ports with less red tape.

Other countries, including key hubs for crew changeovers such as the United Arab Emirates, have in place contradictory, confusing or complex guidance, or don't permit crew changes.

Ministers from 13 of the 15 countries that attended an international virtual summit organised by the UK government on July 9 pledged to end restrictions and allow exemptions for crew changes.

Among the pledges were commitments to endorse United Nations protocols and designate seafarers as key workers to make changeovers easier.

The US and the UK have emerged as the top locations for crew changes as shipmanagers, port agents, and crewing agencies struggle to repatriate those working at sea with an estimated three quarters of changes unable to occur since March, leaving many with expired contracts.

Shipowners, particularly those with smaller fleets and single vessels, reported they are overwhelmed by the bureaucracy, inconsistency and challenges raised to repatriate crew four months after the pandemic shut borders and stopped many international flights.

“We have crew... on board our vessels for more than three months (overdue) and this is a very unhealthy situation to be in,” one marine support services provider told Lloyd’s List.

“We have been trying to communicate with the respective embassies to see if there are any evacuation plans to these countries but to no avail.”

While estimates vary, there are as many as 200,000 to 300,000 crew stranded on ships and unable to disembark due to country lockdowns to fight the coronavirus pandemic.

The cost and effort to navigate shifting rules and regulations and airline schedules is also rising.

As well as the US and UK, France, Germany, and Netherlands have emerged as countries where crew changes are happening with the least paperwork and red tape. Denmark also has fewer restrictions but with borders closed, there are not any regular flights to key supplying countries.

While Saudi Arabia officials attended the summit and signed the statement the country remains closed.

The UAE, another signatory, still has restrictions that are amongst the most confusing, according to port agents and ship operations managers contacted by Lloyd’s List.

Immigration and port authorities there have been criticised for inconsistent application of visas and exemptions that their country’s ministry has issued.

“Direct verbal discussions with numerous authorities means crew changes may proceed at Dubai, Port Rashid, Jebel Ali, DMC and Dubai dry-dock,” information collated by shipmanagers said about the UAE, as of July 14.

For weeks crew have not been allowed to enter the country to board a ship despite guidance saying this was the case and tourists being allowed to fly in.

Hotel stays are not permitted for crew who need to have a valid test result to enter the country. Exiting crew must come ashore by crew boat, be tested and then return to the ship to await results, before they can be signed off.

Shipmanagers told Lloyd’s List that most major seafaring countries including Philippines, Russia, China and Ukraine failed to attend the July 9

summit, adding to cynicism that the diplomatic show of unity would do little to redress seafarers’ difficulties.

BIMCO, the shipowners’ association, said governments needed to step up and work together to find a solution.

“The absence of many key countries from the international community at the summit highlights the apparent indifference of some governments towards the crew change crisis and their lack of understanding of the critical role seafarers play in keeping international trade moving,” said secretary-general David Loosley.

The association is concerned over a lack of timescale given by participating countries, and that closed borders had closed many governments’ minds.

### **Summit Signatories & Crew Change Status: July 14**

- United Kingdom — crew changes possible subject to approval, with some ports and terminals closed, mostly energy-related.
- Denmark — crew changes possible although borders closed, with limited transport and flights
- France — crew changes possible with 72 hours’ notice including health certificates for ship, complete travel documentation, company letter etc
- Germany — changeovers possible, no testing if no symptoms, but no hotel stays possible beforehand, confirmed flight details needed, direct transfer.
- Greece — crew change for non-EU citizens possible since July 1, and only if same-day flights back to country of origin
- Indonesia — off-signers only at certain locations and testing upon embarkation
- Netherlands — crew change possible but must have valid Schengen visa (difficult as no consuls open so must have been in place before lockdown) No hotel stay for on or off-signers
- Norway — crew change allowed despite travel restrictions applicable to foreigners, but conditional 10 days quarantine before entering country.
- Philippines — no foreign crew allowed, tests and 14-day quarantine for off-signers with lockdown at Cebu as positive cases increased

- Saudi Arabia — no crew changes permitted; all borders closed

- Singapore — crew changes not allowed except under special circumstances or urgency, with applications 14 days in advance

- UAE — strict, unwritten procedures around

96-hour crew visa is still causing problems. Must have valid test, off-signers cannot stay at hotels,

- US — on a case-by-case basis in varying ports, with Houston changes recently occurring. Crew must fly into one of the 13 virus testing airports. Easier than most countries with off-signers not required to be tested.

## From logistical puzzle to conundrum — the V.Ships view of the crew crisis

SHIPOWNERS who put their hand in their pocket to cover the inflated cost of repatriating seafarers have been applauded by the head of V.Ships crew management.

“We need to recognise that some shipowners are paying some pretty big bills to make this happen,” Allan Falkenberg told Lloyd’s List.

Last week, V.Ships took advantage of Gibraltar opening for crew changes.

“We had to get 11 Filipinos to Gibraltar to relieve crew on board our vessel,” the chief executive says. “They had to fly via London. The cost of chartering a flight from London to Gibraltar for 11 seafarers was \$40,000. The ship owner paid for that trip — a year’s travel budget on that one flight.

“For the seafarers wanting to go home, they have to wait in a Gibraltar hotel for nine days for a connecting flight to Manila via London. The ship owner had to cover that cost as well.”

When they arrive at Manila airport, the seafarers will be tested, with further quarantine for any found to be positive.

Between March 22 and July 13, V.Ships has achieved 15,246 crew movements — about 1,400 per week. Although Filipinos make up 27% of V.Ships’ 44,000 seafarers, only 2,100 Filipinos have successfully been repatriated.

“Two nationalities have been extremely difficult to repatriate: Filipinos and Indians,” Mr Falkenberg said. “India, because the government still won’t allow any commercial flights into or out of the country, which means you can still only use charter flights. That makes repatriation very hard, unless you can persuade the shipowner to divert to an Indian port for crew change.

“In the Philippines it is still the logistics of so few aircraft allowed to land. Seafarers need to be coronavirus tested in Manila before they go on to their province. There’s still a limit on how many aircraft can carry passengers into the Philippines.”

He stressed the challenges faced by crew management staff.

“Even though we have teams still in many locations, we work across all time zones with ships sitting on the other side of the planet. It takes five times longer to arrange a crew change than under normal conditions.”

Getting seafarers home has become a logistical nightmare, he said. Customs authorities are changing the immigration rules day by day. Some will offer visas on arrival, others won’t; some demand coronavirus testing 48 hours before arrival at the airport; most need to know exactly which personnel are involved several days in advance.

Meanwhile, airlines must keep on checking countries’ requirements, which can change overnight.

“We have had crew arriving at the airport after everything has been arranged only to be turned away because the airline didn’t know the rules,” said Mr Falkenberg.

His office staff have had to apologise to the captain, explaining that even though his repatriation is three months overdue, “this has happened and that has happened — and you will not be going home, yet.”

The work has become frustrating. “My team has been working tirelessly for the last two weeks and then it falls apart because someone didn’t read the rules right,” he explained.

While it has been tough for seafarers stuck on their ships, with mental health becoming a concern, it has probably been even tougher for those seafarers stuck at home, he explained.

They are only paid when they work. Many seafarers went home for Christmas and were available again in March, but the pandemic ended travel to their ships. They have spent seven months without income, which often pays for medical and education expenses plus their home mortgage.

Last week's crew crisis summit, led by the UK government, was a positive move. Some governments have been doing what they can — Mr Falkenberg names Germany, the UK, and Singapore as seeking solutions, although more could be done to coordinate initiatives.

The role of the larger ship manager such as V.Ships has been underpinned in this crisis.

“We represent many ship owners with two, three, or four vessels,” he said. “It’s difficult for them to get their voice heard. V.Ships has 1,000 ships under full management or crew management; we represent 44,000 seafarers from many countries who need to go home. The ship manager can consolidate the voice of the seafarer and ship owner.”

Looking forward, Mr Falkenberg admits he is concerned about the continuing impact of coronavirus on crew sourcing countries.

“We might see an easing in terms of countries accepting visas on arrival, but we are likely to see more coronavirus cases in the Philippines. Then we’ll be stuck with a conundrum: Europe wants to allow crew changes because it’s on the political agenda. But the Philippines will question whether they want thousands of seafarers going through their airports. I’m worried,” he concludes.

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## OPINION

# Decarbonisation is not enough for the sustainability generation

A COUPLE of years ago I was given a badge by the good people at the International Maritime Organization, *writes Richard Clayton*. It is circular and has 17 sections, each of a different colour. There is no motto or phrase that gives away its meaning.

Not long after, one of the panellists at a conference I was covering for Lloyd's List wore the same badge. We were kindred spirits of a secret society. The cause should not be secret, although trying to get this industry hooked into the United Nations' Sustainable Development Goals has been tough.

Partly, the SDG campaign suffers from the very same malaise that afflicts the crew change crisis: while there are plenty of expressions of deep concern and much urging, there is little voluntary commitment to concrete steps.

This morning's launch of a Bachelor's degree in Global Sustainable Development by MLA College — which started life as a small department within Plymouth University, moved to IMarEST, and is now a member of the BAU Global network — is aimed at the 'sustainability generation'. This is not a reference to age or any given demographic, the course leaders explained; it is all of us.

“This all becomes increasingly important in a world that is finally beginning to understand that sustainability is not an optional extra for the nation state but a fundamental requirement,” observed MLA College's head of academic operations Jamie Cross.

No one could argue that shipping has missed out on calls for a sustainable future. In fact, the calls are becoming louder year after year. IMO 2020 was a commitment, by the UN agency, to reducing sulphur emissions as part of a decarbonisation effort.

The Poseidon Principles is a framework for integrating climate considerations into finance decisions to promote shipping's decarbonisation. The Getting to Zero Coalition aims to accelerate shipping's decarbonisation with the development of zero-emission vessels.

All three of these initiatives focus on SDG 14, which is concerned with protecting the world's oceans. It is a natural fit for a maritime sector that makes its living on water. What makes this BSc in Global Sustainable Development most relevant is that the essence of good global citizenship is that focusing on just one SDG is not good enough. There are 17 colours on my badge for a reason.

Nikil Seth, executive director of the United Nations Institute for Training and Research, which covers universities such as MLA College, used his presentation at the launch to make a point shipping might have overlooked in its emphasis on decarbonisation.

“SDGs bring together universal economic and social aspirations, especially around the eradication of poverty, a dramatic reduction of inequalities, and improvement of health.” It is, he said, “a quest for a fair, equal, and just society.”

However, we should not be unpicking the entwined threads that make that society work in order to solve one problem. They go together.

The eradication of poverty has received a severe setback against the backdrop of the coronavirus.

The World Trade Organisation warns that the downturn of trade caused by the pandemic “will be very severe for the poorest countries which are heavily dependent on export earnings, particularly from one or two commodities,” Mr Seth said. Shipping is part of the problem – and part of the solution.

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## ANALYSIS

# California's ports at risk of losing market share

INDUSTRY groups are calling on California's lawmakers to act to reverse the loss of market share as discretionary container volumes continue to decline at the state's ports.

They have written to state Governor Gavin Newsom and the legislature asking them to consider the importance of the local goods movement sector.

The lobby group, comprised of nearly 50 state-wide and national organisations, has requested the governor and legislature:

- To promote California ports as “the most efficient and environmentally progressive” in the nation;
- To meet the challenge from east and Gulf coast states whose governmental leaders promote and invest in their ports and goods movement industries;
- To re-examine the state and regional regulations that are creating a disincentive to use California gateway;
- To reconcile state laws encouraging environmental and efficiency mandates with the need to re-train workers to adapt to a changing work environment.

Crucially, they are seeking clarification whether policies, particularly in environmental areas, are “backfiring and encouraging more greenhouse gas

emissions by sending more business to ports that are far behind California's climate programme”.

In support of their demands, the group cited analysis prepared for the Pacific Merchant Shipping Association that “west coast ports' market share has declined 19.4% since 2006”, currently resulting in some “5.6m fewer containers travelling through west coast ports”.

In their letter, they said that such loss of market share impacts “labour unions, many of California's leading employers, including retail, trucking, warehouse and distribution centres, ports, railroads, marine terminals, and export industries such as agriculture and aerospace”.

The group said infrastructure improvements and operational costs “will be borne by California residents, as discretionary import cargo is diverted to east and Gulf Coast ports”.

Pointing out that trade routes are established over time and around infrastructure such as rail, warehouses, and distribution centres, the group expressed concern that market share will leave the state permanently.

“Loss of market share means that investments in infrastructure are happening in other states, not California, resulting in more jobs and higher state and local tax revenues elsewhere and fewer jobs and state and local tax revenue here.”

# Trading platform seeks to expand into dry bulk futures

BLOC-X, a newcomer to the freight derivatives market, is looking to expand into iron ore futures and dry bulk forward freight agreements.

It has been in discussions with “various industry participants” for several weeks, company founder Andrew Toumazi said, adding that “any platform such as this is about building a community”.

“If we see sufficient market appetite and commitment we would look to enter,” he told Lloyd’s List, adding that the ability to add new instruments would only take a few days for the software company.

Bloc-x, which was incorporated in the UK in July 2018, is an electronic over-the-counter block trading platform. It is not regulated, and is not required to be, as it is a technology company and does not undertake any regulated activities, according to the founder.

“The system has the look and feel of a trading system,” he said.

He said the system allows a trader to place bids or offers through a regulated broker. The regulated broker has all its normal regulatory responsibilities surrounding this customer. Either the broker or the trader can choose to buy or sell on the platform but the finalisation of any ‘on platform’ negotiations are always ‘arranged’ off platform.

“A negotiation does not need to be a conversation but denotes two parties bi-laterally communicating around a specific product, tenor, price and volume,” Mr Toumazi added.

Greece-based Signal Group, with which Mr Toumazi has had a previous connection, is a minority shareholder in Bloc-x with 74,297 shares (4.46%) as of July 2019, according to a filing with Companies House. It has been an investor since early 2019.

Signal’s head Ioannis Martinos said he remained “very interested to discuss, invest in and partner up with individuals or teams who are looking for applications of technology in commercial shipmanagement and the commodities trading space”.

He added: “We broadly like commodity tech investments, as the space is rapidly changing and we believe some strong companies will come out of this process.”

Mr Toumazi, who has worked at Goldman Sachs and Bloomberg among other leading financial institutions, started Bloc-x because he saw “changes in the market” that convinced him there was a need for such a solution.

“Had I not had the combination of a career in trading, and then the last ‘stint’ being in one of the most successful financial software providers in the world, I certainly would have been far more reticent about making this leap,” he said.

FFAs are just one of the products the company now covers, having started off with 25 oil products. The first orders were put through in the fourth quarter of 2019.

Tanker FFAs launched in April this year, and the product is gaining some traction, with the addition of one to two counterparts each week. Brokers Ocean Solutions and Barry Rogliano Salles use the system.

While Mr Toumazi has been “pleasantly surprised” by the level of activity so far, he admits that “more work is needed to reach our goal of being a critical workflow solution”.

There have been several attempts at kick-starting an FFA trading platform over the past 20 years, with limited success.

The Baltic Exchange closed its Baltex electronic trading platform in 2017 after six years when the London Clearing House shut its freight service and regulatory reporting became more onerous due to tougher European Union regulations.

Shipbrokers also had in-house platforms, although they too proved short-lived, according to industry sources.

*Additional reporting by Nigel Lowry in Athens*

## MARKETS

# Box lines face discipline dilemma as outlook improves

CONTAINER lines will come under pressure to maintain pricing discipline as demand returns to the market in the latter part of this year.

But capacity management would be tied to the perceived threat levels from the pandemic, according to Drewry analyst Simon Heaney.

“I think that as long as the virus is an existential risk it is something carriers will keep a close watch on,” he said.

“The key for them is to maintain freight rate levels. They will introduce capacity as we start to see some tentative signs of recovery and they will correct wherever possible.”

Speaking in a webinar presenting Drewry’s latest outlook forecast for the sector, Mr Heaney said carriers would take a gradual approach to returning capacity to the market.

“They will dip into the charter market on short-term durations so they can have a rapid response in terms of withdrawing and adding supply as and when it is needed,” he said.

“We suspect that during the second half of the year there will be some loosening of discipline as capacity is brought back into the market,” Mr Heaney said.

“Our forecasts for freight rates and profitability are heavily tied to the trajectory of the pandemic, but a bigger influence on them will be whether carriers can hold on to historically elusive capacity and pricing discipline.”

Nevertheless, while recent merger and acquisition activity and market concentration had better enabled lines to manage capacity and enforce commercial discipline, Drewry expects their grip on the market to slip as traffic returns.

“Maintaining the balancing act between capacity deployment and cargo demand will become tougher to sustain as focus switches from chasing to chasing returning volumes and a threat to survival recedes.”

Drewry has reversed the gloomier forecast it made in March that predicted a steep fall in rates, but still thinks rates will soften in the second half of the year.

“We think that through the second half of the year rates may soften,” said Drewry research Martin Dixon.

“We are therefore projecting that there will be a moderate increase in blended global spot and contract rates of around 3% instead of the much sharper decline that we predicted back in our March forecasts of 6% declines.”

Moreover, signs that carriers were managing to perform well during the second quarter had led it to revise the sector’s earlier forecast of a \$6bn loss to a \$9bn operating profit for the year.

“We did not think carriers would be able to reduce costs beyond the sales decline, but we clearly underestimated their survival instincts,” Mr Dixon said.

Drewry has forecast a baseline scenario that sees port throughput volumes declining by 7.3% in 2020, the worst performance since the global financial crisis in 2009.

The base forecast has the second quarter as the bottom of the market, with global throughput for the period predicted to crashed by about 16%.

“Our assumption is that activity will improve through the second half of the year as lockdowns are lifted and stimulus packages kick in, but the quarterly year-on-year growth rates are going to remain negative until at least the beginning of next year as the world adjusts to the new rules of living that we are all getting used to.”

Drewry expects activity to rebound strongly in 2021 with a 10% increase in volumes, putting port handling back to the same levels as it was in 2019.

“Assuming the economic inputs from the likes of the IMF are correct, we would expect to see a modest upward curve over the remainder of the forecast horizon to 2024, with a compound annual growth rate of 3.5%,” Mr Heaney said.

But he warned that the confidence levels of in the forecasts were low due to uncertainty over the development of the pandemic.

“If there is a failure to contain the virus this year or a fresh outbreak next year, then you will quickly

see the forecast for next year slip into negative territory.”

## Changes in Chinese foreign policy could shake up iron ore trades

GIVEN that China’s economy is still the most resilient factor in the dry bulk market, any changes in Chinese policy on iron ore imports can have a dramatic impact on the segment.

The backdrop provided by the coronavirus has ravaged supply chains and economies around the world has given food for thought throughout many sectors, including resource management and dependency.

This is especially the case in China, which, for its massive iron ore demands relies principally on Australia and Brazil.

The Chinese iron ore trade is the driver for the capesize and panamax segments and so any shift in demand patterns has the potential to cause considerable disruption in the shipping markets, according to maritime consultants Dynamar.

“In the wake of the first wave of the corona crisis, there is growing talk in China about the future of its iron ore supplies and whether the country and the industry can wean itself away from such a high level of dependency on one or two sources,” it said.

These questions have arisen before and previous system shocks have had a significant impact. Now, if long-term, structural supply changes are planned, the seaborne iron ore market could see major shifts.

If either one or both of the main producing countries, namely Australia and Brazil, experience some type of supply chain disruption, it ripples throughout the entire market.

While China is not endowed with large reserves of the key steel-making ingredient, Dynamar noted

that many in the industry are pushing for a diversification in the supply sources, with Chinese business entities keen to take a stake in the mining and processing of what is a key strategic resource.

One area of focus is Sub-Saharan Africa, where iron ore deposits remain largely unexplored or have yet to be developed.

“It has been reported that the Belt and Road Initiative could be one of the avenues for this expansion of Chinese overseas interests in key iron-ore producing countries, similar to the way Chinese companies control much of the cobalt supply chain through countries including the Democratic Republic of the Congo.”

In the coming years, the Simandou project in Guinea will come online. This could help reduce the reliance on the traditional sources, but it will not end China’s dependence.

“New sources must be found and developed in what, in the long term, could mark a considerable shift in the structure of the seaborne iron ore market,” the consultants conceded.

“In the longer term, such shifts — and the required policy and investment action — could lead to a shakeup of the dominant dry bulk trade.”

Furthermore, Chinese resource policy overseas can also cause friction politically. There have been grave concerns raised about the means by which China takes control of key strategic infrastructure around the world, such as the handover of the strategic port of Hambantota in Sri Lanka, and the exploitation of key resources in developing countries.

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## IN OTHER NEWS

### China ports group agrees deal with Greek authority

CHINA Merchants Port is making inroads into Greece’s maritime sector after signing a co-operation deal with Thessaloniki Port Authority.

Two agreements, on strategic co-operation and implementing CMPort’s terminal operating system, were signed between the two parties as well as the major Chinese port operator’s IT subsidiary China Merchants

Holdings (International) Information Technology, CMPort said in a statement.

The deal will encompass commercial and operational collaboration between CMPort



and Thessaloniki Port Authority to promote the port of Thessaloniki in the Chinese market, as a gateway port.

### Ports question post-Brexit border blueprint

THE UK's post-Brexit plan to create the "world's most effective border" will be challenging for ports to implement, according to senior sector sources.

After the government unveiled its so-called Border Operating Model this week, ports say further information on how things will work is still needed beyond the 200-page blueprint for the scheme.

Other supply chain professionals are raising concerns over the extent of the bureaucracy that will necessitated, and the practicality of getting everything

up and running by the extended deadline of July 1 next year.

### Opec to discuss next phase of production cuts

A RESURGENCE in demand and disciplined reduction in supply mean that a rebalance in the oil market is edging closer, according to the Organisation of the Petroleum Exporting Countries secretary-general Mohammed Barkindo.

Mr Barkindo said oil markets could have suffered a total collapse if Opec nations and their partners had not agreed to cut supply.

In April, the so-called Opec-plus countries – the oil alliance led by Saudi Arabia and Russia – agreed to cut production by 9.7m barrels per day for May and June. They subsequently extended that to July.

### Shipbreaker's widow can claim compensation in the UK

THE widow of a shipbreaking worker who died while helping to demolish a Maran Tankers VLCC in Bangladesh can sue for compensation in the UK.

The ruling by the High Court in London potentially paves the way for hundreds of similar claims against owners for death or injury to workers in Southeast Asia's notoriously-dangerous shipbreaking industry.

The claim of negligence against London-based Maran Tankers was brought by Hamida Begum, the wife of Khalil Mollah, who died while working on the demolition of 300,294 dwt tanker *Maran Centaurus* in 2018.

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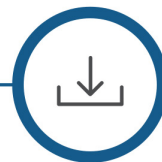
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