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Ocean Alliance set to be largest grouping in 2025's new container line-up

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Cosco

In a fortnight, liner shipping will go through its largest reshuffle in a decade as companies jump ship from existing alliances on the main east-west trades.

The only grouping remaining intact come February 1, the Ocean Alliance, made up of COSCO, OOCL, CMA CGM and Evergreen, will also be the one with the largest market share and widest market coverage this year, according to analysis from Linerlytica, an Asia-based container shipping consultancy.

Data from rival Alphaliner shows the Ocean Alliance will deploy a total of around 390 container vessels with an estimated nominal capacity of nearly 5m teu.

THE Alliance will become the Premier Alliance from next month, with Ocean Network Express (ONE), HMM and Yang Ming Marine Transportation as partners, and Mediterranean Shipping Co (MSC) helping plug gaps on Asia-Europe tradelanes. From the end of January, MSC is ditching Maersk in the 2M vessel sharing agreement to largely go it alone, and Germany's Hapag-Lloyd subsequently exiting THE Alliance to join the Danish carrier in what will be called the Gemini Cooperation.

Linerlytica data shows the Ocean Alliance will have what it describes as a “dominant” position on the transpacific with 15 sailings to the west coast and eight sailings to the east coast. It will also have the widest coverage to North Europe with a seventh service to be added, matching MSC’s coverage. MSC will remain the dominant carrier to the Mediterranean, according to Linerlytica, with the Swiss line offering six weekly services.

The Linerlytica data shows the Gemini Cooperation made up of Maersk and Hapag-Lloyd will become the smallest alliance with the fewest number of weekly sailings on offer in 2025.

Attention is now turning to how smoothly this alliance shuffle will go.

“We think the upcoming alliance reshuffle which could disrupt schedules and official announcement of tariffs after President-elect Trump takes the office could arrest the sharp rates decline and keep rates at a relatively high level in 1H25, boding well for transpacific contract negotiations,” states a new liner markets report published today from HSBC.

Analysts at Copenhagen-based Sea-Intelligence have argued that since it has now been more than four months since the announcement of the new alliance networks from the carriers they should have had ample time to prepare a smooth transition into their new networks.

“Sure, there will be some operational hiccups – that is unavoidable when hundreds of vessels change schedules – but this is happening during the slack season after Chinese New Year, and should hopefully be manageable,” Sea-Intelligence noted in its most recent weekly report.