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## Outsiders and alliances in container shipping

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HMM recently announced that the carrier will join THE Alliance in April 2020.

This marks the end of HMM's search for alliance membership after the G6 alliance ceased to exist some 4 years ago. In 1998, HMM became an alliance member for the first time when the carrier joined the New World Alliance (NWA).

In the early 2010s, the NWA teamed up with the Grand Alliance members to create G6. A wave of M&A activity in the liner shipping industry resulted in a new alliance landscape in recent years. HMM found itself outside the alliance structure for the first time since the pioneering years of alliances. HMM made attempts to team up with the 2M alliance.



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# HMM's position alliance formation

Q2 1996	Q1 1998	Q4 2005	Q4 2009	Q1 2012
<b>GLOBAL ALLIANCE</b>	<b>NWA</b>	<b>NWA</b>	<b>NWA</b>	<b>G6 ALLIANCE</b>
APL	APLNOL	APLNOL	APLNOL	APL
MOL	MOL	MOL	MOL	MOL
Nedlloyd	<b>HMM</b>	<b>HMM</b>	<b>HMM</b>	HMM
OOCL				Hapag-Lloyd
MISC				NYK Line
	<b>GRAND ALLIANCE II</b>	<b>GRAND ALLIANCE III</b>	<b>GRAND ALLIANCE IV</b>	OOCL
<b>GRAND ALLIANCE</b>	Hapag-Lloyd	Hapag-Lloyd	Hapag-Lloyd	CKYH
Hapag-Lloyd	NYK Line	NYK Line	NYK Line	Hanjin
NYK Line	P&O Nedlloyd	OOCL	OOCL	K-Line
NOL	OOCL	MISC		Yang Ming
P&OCL				COSCO
	<b>UNITED ALLIANCE</b>	<b>CKYH</b>		
	Hanjin	Hanjin		
	Cho Yang	K-Line		
	UASC	Yang Ming		
		COSCO		
	<b>CYK ALLIANCE</b>			
	K-Line			
	Yang Ming			
	COSCO			

While some slot charter agreements are in place, it became evident that HMM would not receive full member status of 2M. HMM's associate status to 2M will end in April. HMM has an impressive orderbook despite the carrier's somewhat smaller scale compared to the top 5 carriers.

Operating the new range of mega vessels alone did not seem to be an option, hence the announced membership of THE Alliance (other members include Hapag-Lloyd, Ocean Network Express - ONE - and Yang Ming).

The strategic move of HMM comes at a time when the European Commission is evaluating the impact and relevance of alliances in order to determine whether the

Consortia Block Exemption Regulation (Commission Regulation 906/2009), which expires on 25 April 2020, should be prolonged and, if so, under which conditions.

***(By Theo Notteboom, PortEconomics)***