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MI INSIGHTS

Welcome to MI Insights



With host Christian Tedaldi



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Marubeni-Itochu
Tubulars Oceania (MITO)

Across the Ocean Shipping

International freight forwarder, fulfillment & supply chain specialists



David Aherne Managing Director

With over 25 years in global logistics, he has led ATOS in connecting businesses worldwide through smart, reliable, and customer-focused supply chain solutions.



Navigating the High Seas — Global Supply Chain & Logistics Dynamics

USA & Australia Peak Season 2025 Impact

USA

- Early peak season (July–Aug)
- Trump tariffs hit China hard

Asia

- Hit a 6-month high in July
- Sept – 2.31m TEU down YOY with China imports dropped 22%

Australia

- Strong peak season Sept–Nov; huge surge
- Full vessels and rising rates.

Global trends

- Ocean rates dropped globally;
- Australia has broken that trend by hitting its 2025 peak

Tariffs

- Uncertainty in the market
- US rolling out tariffs globally
- China was significantly hit with **145% tariffs** (which were partially rolled back).
- **Knock-on effect:**
 - Order delays/cancellations,
 - Demurrage days at US ports rising to **8.1 days** on average
- Rule of thumb most exports into USA from Australia will be subject to **10% duty**.
- Global trade volumes are being compressed with a **1%** contraction in global merchandise trade volumes for 2025.

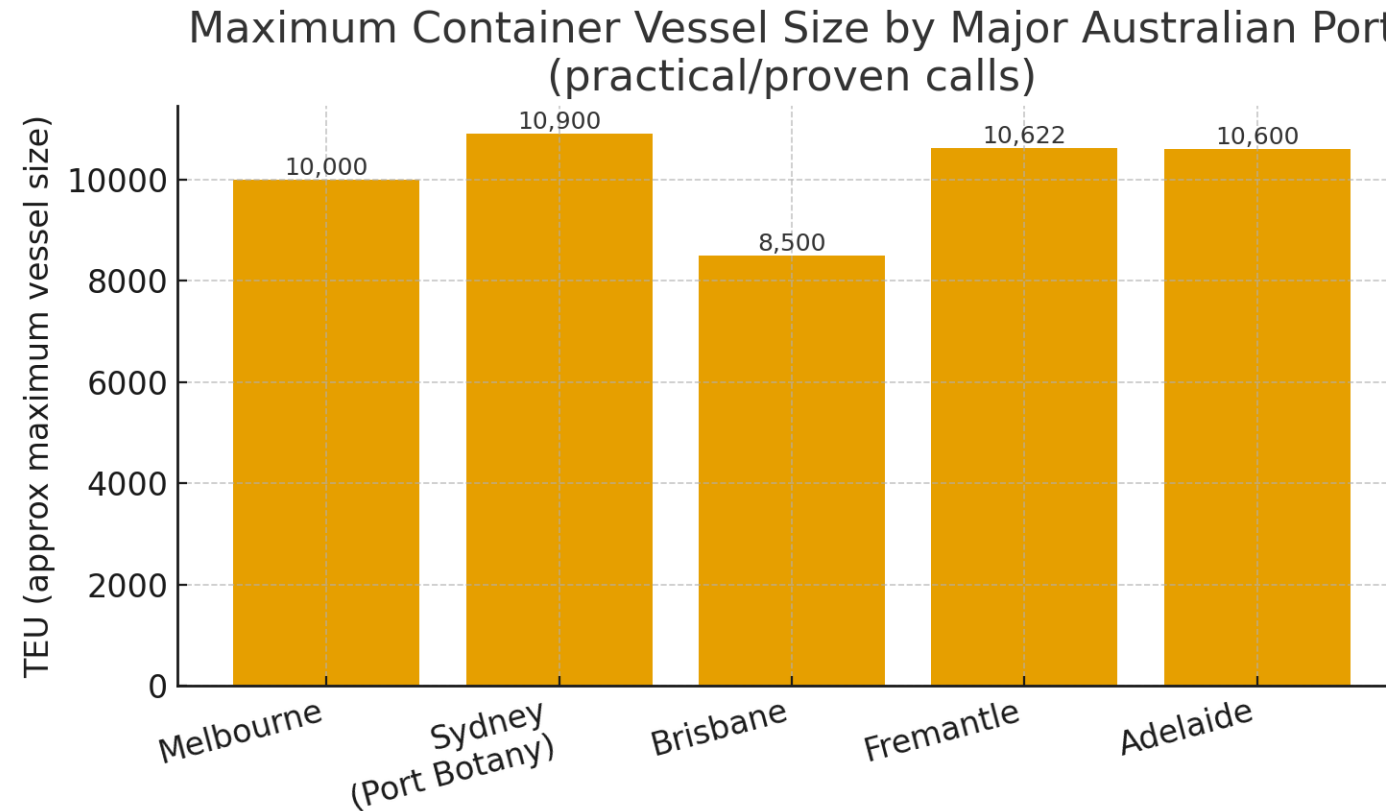


AU Activity

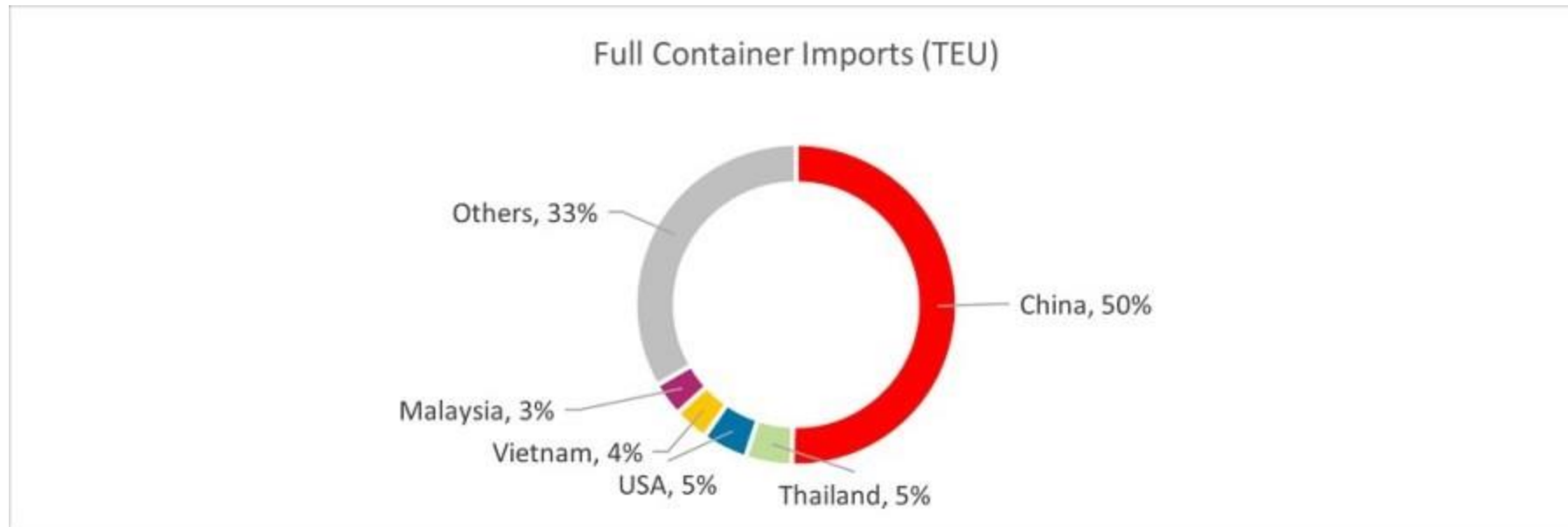
- New larger vessels/Hybrid/Environmentally friendly – Australia can't handle 20k–24k TEU ultra-large green vessels; remains a mid-size ship market.
- BF data shows **+9% YoY growth**
- HPL ordering 16 mid-size ships (4,000–6,000 TEU), ideal for AU market.
- MSC's transportation capacity target rising from ~7m TEU to 8m TEU by 2026.
- COSCO/OOCL: Aiming for 6m TEU annual capacity by 2028



Australian Container Ports

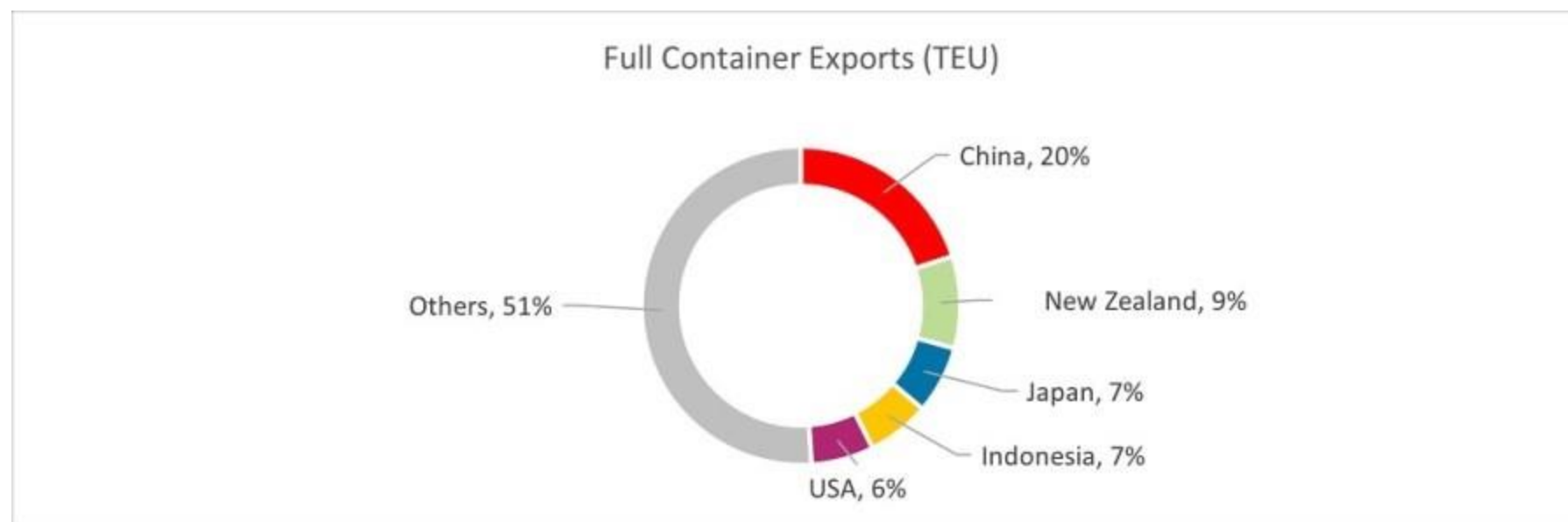


Australia's Biggest Container Port: Melbourne



In FY25, Port of Melbourne handled approximately \$154 billion worth of trade—the highest trade value ever recorded.

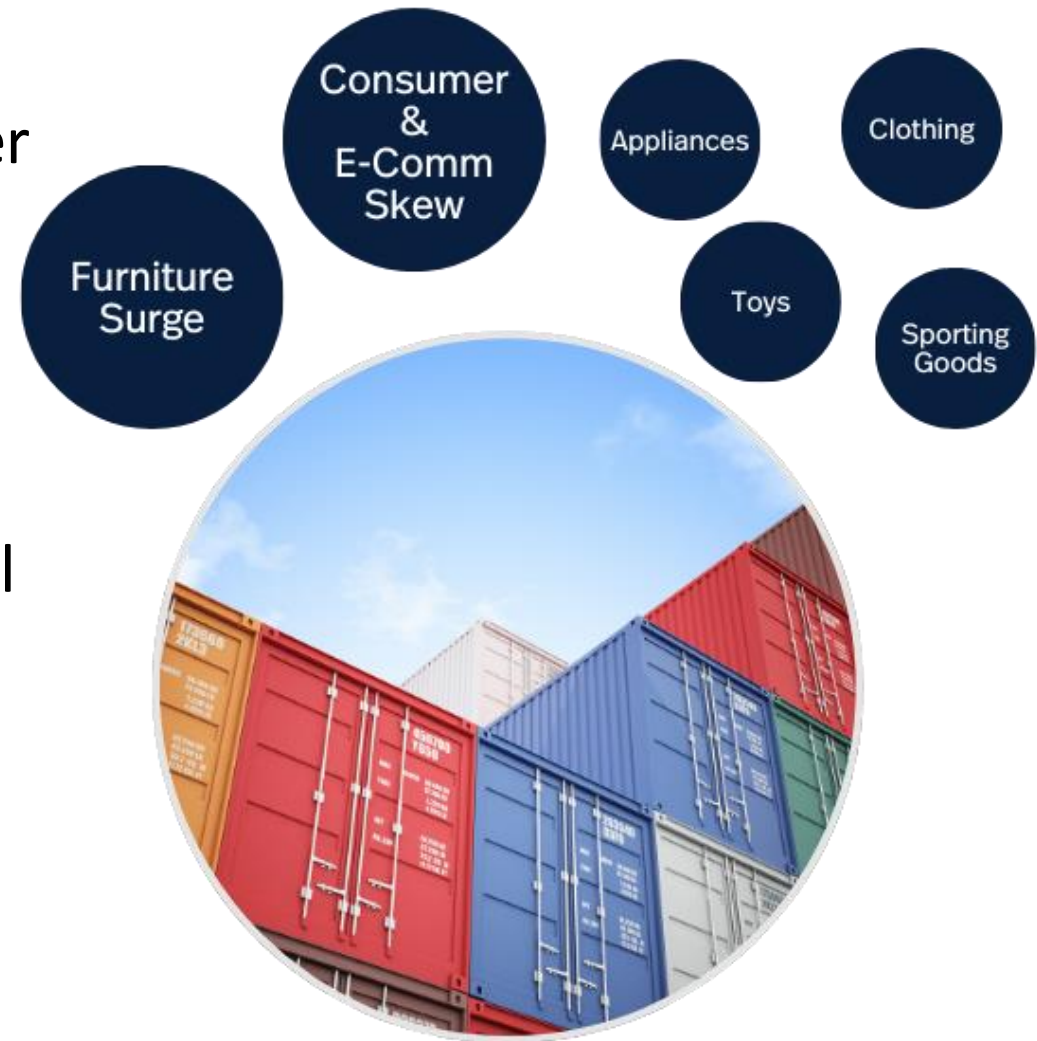
Exports from Melbourne



Apart from China, Southeast Asia has emerged as a key trading region in recent years. Most notably, exports to the region have steadily risen from 19% in FY20 to 27% in FY25. In FY25, three of the Port's top five import sources were Southeast Asian nations – with Indonesia making it into the top ten. These four countries have also consistently been among the Port's top ten export destinations.

What's in the Containers?

- **Furniture Surge:** 9% of the container shipments into Australia's biggest port - Melbourne contain furniture
- **Consumer & E-Comm Skew:** Peak season high demand driven by retail compared to industry products.
- **China is still the #1 Origin**
 - 50% of the containers inbound are China-sourced



Break bulk / Project Cargo:

Asia-Pacific

- Largest regional market for break-bulk in 2025-2030.
- Expected to reach **US\$35.64 billion** this year.

Mega project-driven demand

- Renewables, mining expansions, defence and transport infrastructure

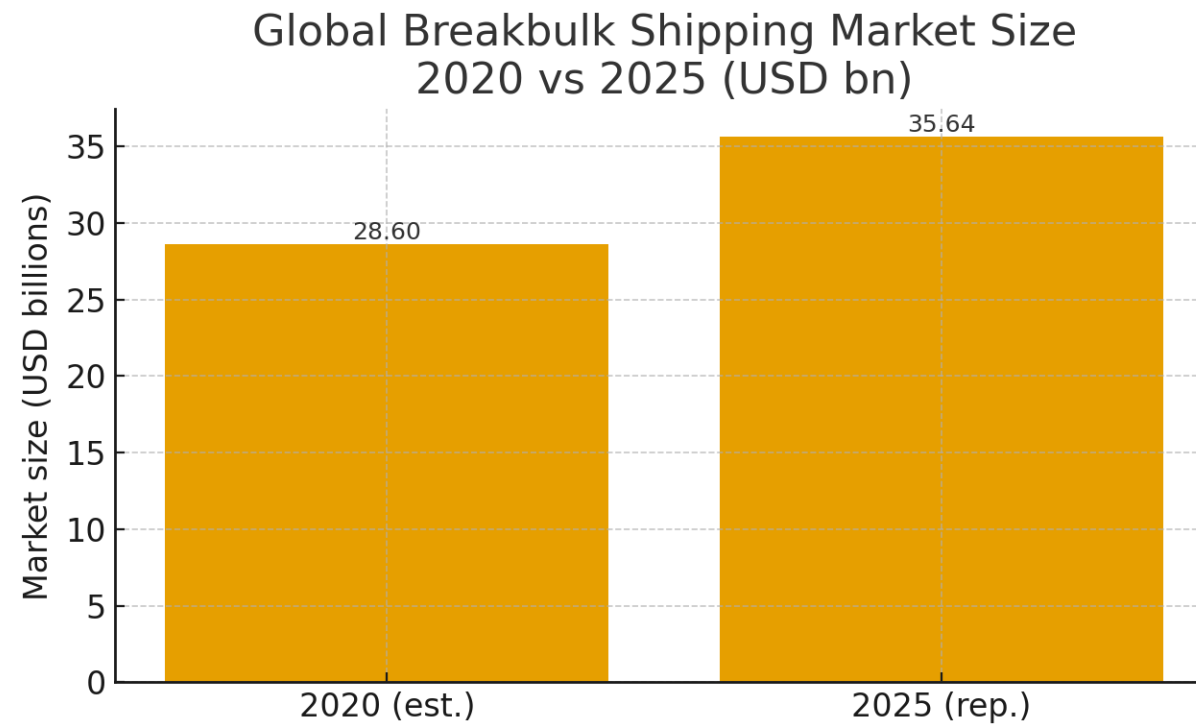
New services

- Swire connects Australia with China, Japan & South Korea
- MOL is expanding through Asia

BYD

- **US\$1 billion** manufacturing plant in Indonesia.
- Underscores the growth of breakbulk shipping in the Asia Pacific.

Global Breakbulk Market 2020 vs 2025 (Projected)





Big Picture Issues – Macro Effects in AU

1

Port infrastructure is lacking behind despite a major investment in Bundaberg.

2

Goods & services surplus was **A\$30.2 billion** in 2024.

Exports  ~4.5%
Imports  ~4.8%

3

98% of trade arrives **via sea into Australia**, shipping rates will have a direct macro – inflation impact

4

Maritime sector is undergoing a “**fundamental shift**” towards green fuel corridors, fleet renewal & decarbonisation

Risk Indicators



Geopolitical Disruption

Conflict, sanctions & piracy



Regulatory & Environmental Pressures

USA – Chinese Flag vessels
Emissions
Carbon Pricing



Infrastructure Bottlenecks



Cyber Security

Forecast – Next Few Years' Outlook

- **Major infrastructure development:** Port of Bundaberg development to open Pacific trade routes and ease pressure on Brisbane/Gladstone
- Limited vessel capacity and specialised equipment keep **costs per tonne/CBM** higher than container freight.
- Australia's growing population will lift freight/logistics from **US\$99bn to US\$123bn** by 2030.
- Asia remains the core trading partner with Australia, with a continued focus on China + 1. (India, Vietnam, Indonesia) will dominate inbound flows.





Q&A



Thank You

For any questions or business opportunities, please reach out to:



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