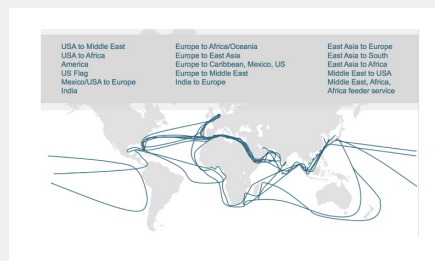


Roll on / Roll off

- Created to accommodate cargo that can roll onto the ship by itself
- No cranes needed –all ports suitable
- PCC - Pure car carriers
- PCTC - Pure car and truck carriers
- HH - High and heavy
- Demand is large –future seems safe
- Challenged by FEUs?
- CEU - car equivalent unit

A global trade system



RoPax

- Roll on / roll off passenger
- ROPAX built to freight vehicle transport along with passenger accommodation
- Catamarans, ro-ro ferries
- New ships, environmental focus (hybrid, LNG, batteries)
- Income from both government subsidies and tickets
- Competition from bridges and tunnels

Segment competition intensity:

- Increased competition internally in the segment, especially small vs large
- Cars and planes are substitutes
- Some small newcomers, many suppliers
- Large customers (state, county)
- Pressure in bidding processes, small margins
- Some economies of scale and minimum crew

C

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