



Press release

Satisfaction survey in container transport: Shippers dissatisfied with clarity of surcharges and transit times

London, UK, and Brussels, Belgium, 8 April 2019

The level of satisfaction concerning container carriers among exporters, importers, and freight forwarders falls marginally, according to the third annual shipper satisfaction survey of Drewry and the European Shippers' Council (ESC).

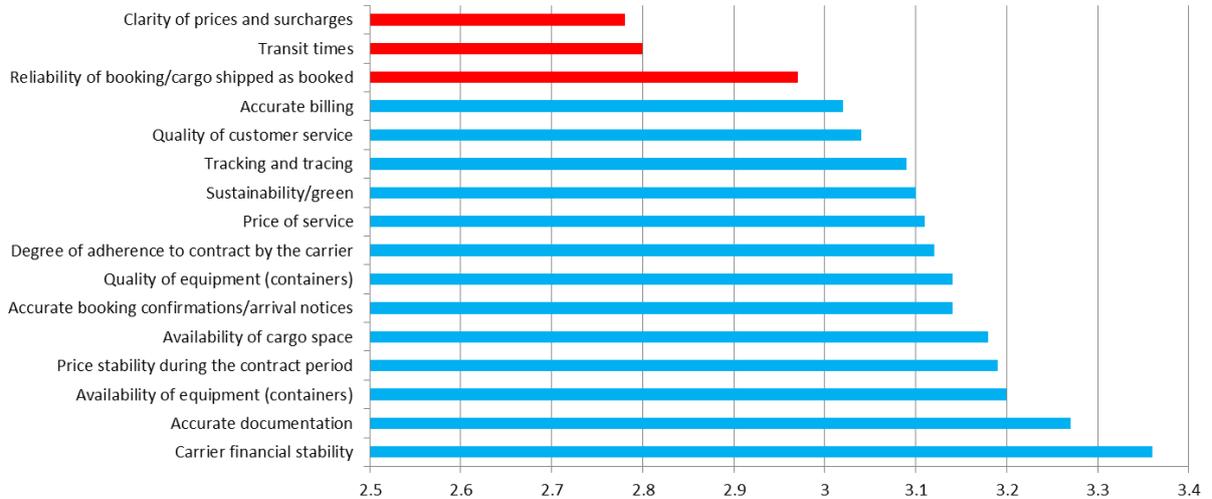
The joint ESC and Drewry survey reveals that the 249 shippers and forwarders who took part in the survey rated *the service of container shipping lines* with a score of 3.1 on average (which is 0.1 lower than last year) on a scale of 1 (very dissatisfied) to 5 (very satisfied).

Customer satisfaction was reported least favourable for *clarity of prices and surcharges, transit times, and reliability of booking/cargo shipped as booked* scoring between 2.8 and 3 (see chart).

The carrier service attributes which shippers were the most satisfied with were *carrier financial stability, documentation accuracy, and availability of equipment (containers)*, which received average scores between 3.2 to 3.4.

All the service features were overall awarded mid-range scores; only 4% of customers were "very dissatisfied" with carrier services and only 6% were "very satisfied".

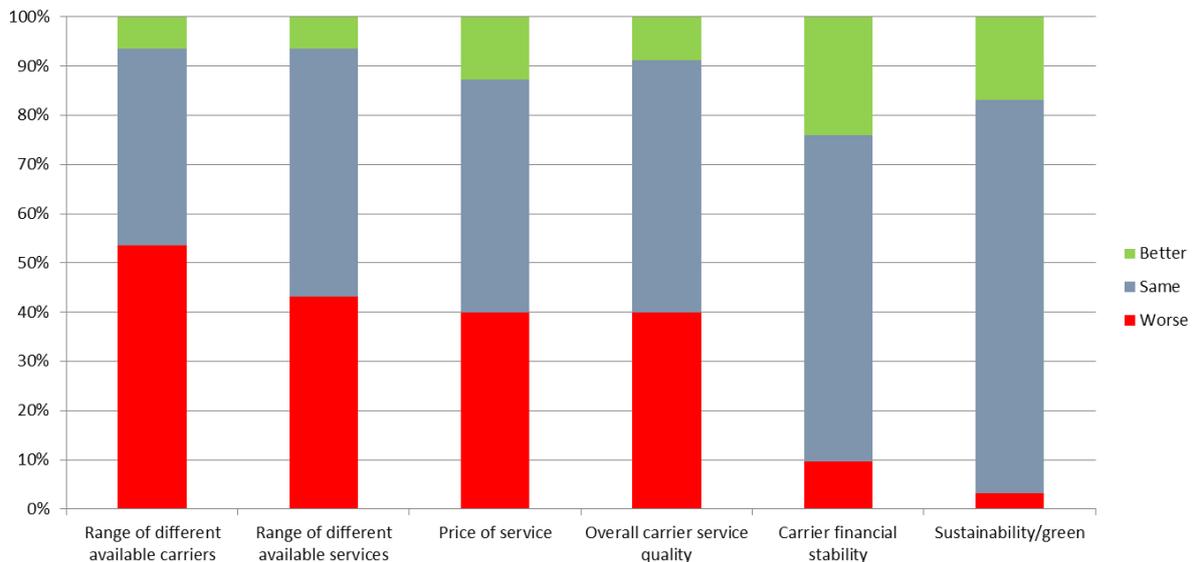
Based on the service you received from carriers in 2018, please tell us how satisfied you are with the carriers on average for each of the service and cost criteria from 1 (very dissatisfied) to 5 (very satisfied):



Source: Drewry-ESC shipper satisfaction survey 2019

Shippers and forwarders also said that carrier performance has deteriorated between 2017 and 2018 in four areas: *the range of different available carriers, the range of different available services, the price of service, and the overall carrier service quality*. But *carrier performance related to sustainability/green and carrier financial stability* have improved since 2017, according to the survey respondents.

Compared with 2017, how do you assess the performance of the carrier industry in general in 2018?



Source: Drewry-ESC shipper satisfaction survey 2019

“The survey results reinforce the opinion already expressed in the recent ESC Position Paper and in the message addressed to the EU Directorate-General for Competition on the Consortia BER that more transparency is needed from maritime carriers,” said Jordi Espin, ESC Maritime Transport Policy Manager. *“Service levels, performance targets, market improvements, and price structuring should be set with a focus on clarity and an open observation analysis,”* added Jordi Espin.

“It is very clear that clarity of prices and surcharges has become a key topic for shippers and forwarders – particularly medium-sized ones. Starting from the 2018 emergency fuel surcharges and continuing with the current uncertainty over post-IMO 2020 fuel surcharges we expect the conversation between carriers and shippers to remain ongoing in 2019,” said Philip Damas, head of the logistics practice at Drewry.

“In the short term, carriers ought to be more transparent in their new BAF matrices and formulae and need to address their customers’ growing needs for predictability and visibility of carrier performance in the long run if they want to reach good levels of customer satisfaction,” added Damas.

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About Drewry

Drewry is a leading international provider of research and consulting services to the maritime and shipping industry. From its origins in 1970 London to a 21st century maritime and shipping consultancy, Drewry has established itself as one of the most widely used and respected sources of impartial market insight, industry analysis and advice. Offering a unique combination of sector knowledge, rich market insight and commercial awareness

Drewry is able to consistently deliver the performance, profitability and competitive advantage its clients seek.

Drewry serves its clients through four business units: Drewry Maritime Research, publishing market-leading research on every key maritime sector; Drewry Maritime Advisors, supporting the needs of shipping and financial institutions; Drewry Supply Chain Advisors, providing sea freight procurement support to retailers and manufacturers; and Drewry Maritime Equity Research, delivering an Investment Research Service on listed companies operating in the industry.

Drewry has a truly global perspective of the maritime sectors and areas of expertise it covers and employs over 100 professionals across an international network of offices in London, Delhi, Singapore and Shanghai.

About the ESC

European Shippers' Council was founded in 1963 to represent the logistic interests of manufacturers, retailers, and wholesalers, collectively referred to as shippers, in all modes of transport. ESC Members are national shippers' councils, key European commodity trade associations, and corporate members. Thus, European Shippers' Council represents the freight transport interests of some 100,000 companies.