

## Early Results Show New Alliances Set to Reshape Container Shipping



Early results show a strong improvement in schedule reliability for the new alliances (Maersk)

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While it is only a little more than a month since the new alliances began to integrate into the operations of container shipping, the first results show the new organization has the potential to dramatically reshape the competition among carriers. Overall, the sector has struggled to claw back its schedule reliability after the surge in volumes and port congestion during and after the COVID-19 pandemic, but according to new data from Sea-Intelligence, the new alliances have the potential to dramatically reshape the industry.

Maersk and Hapag-Lloyd detailed a new model for their primary routes which will be operating in the new Gemini Cooperation. They highlighted a new approach with fewer ports for the larger vessels being fed by more regional operations saying that the goal was to achieve at least 90 percent schedule reliability. Gemini has expressed confidence that as it rolls out and demonstrates the success of its strategy shippers will be willing to pay higher costs for the certainty that they can offer.

For all of 2024, the sector struggled to break out of a range in the low to mid-50 percent schedule reliability. Sea-Intelligence calculates the industry overall across 34 different trade lanes averaging just 53 percent schedule reliability. This was down nine percentage points from 2023 or 15 percent.

The report highlights that 2025 was following the same overall pattern. The average for the more than 60 carriers operating in the sector remained at 53 percent for the first two months of the year.

Gemini began its rollout on February 1 and the new Premier Alliance also began its rollout, while the former 2M between Maersk and MSC is winding down and the former The Alliance was reformulated

with the departure of Hapag-Lloyd. In addition, MSC Mediterranean Shipping Company, after amassing a strong lead in the number of vessels and capacity is mostly going it alone.

Sea-Intelligence calculates for February the Gemini Cooperation recorded 94.0 percent schedule reliability in origin ports in February 2025 for its first voyages, followed by MSC at 79.6 percent, and Premier Alliance at 60.4 percent. Ocean Alliance recorded 54.1 percent schedule reliability, while the outgoing THE Alliance scored 45.3 percent, and 2M achieved 44.2 percent.

“It is important to stress that the new alliances are just in the beginning phase of their network roll-out, and they will only be fully rolled out in July 2025, and only then will it be possible to truly evaluate their performance. It is nevertheless an interesting data point, to see how they have performed on the initial origin arrivals,” said Alan Murphy, CEO of Sea-Intelligence.

The traditional February data further highlighted how the alliances are poised to reshape the sector. While global schedule reliability improved by 3.6 percentage points month over month, it was at only 54.9 percent for the sector. Murphy notes that it was the highest level recorded since May 2024 and that on a year-over-year basis, February 2025 was higher by 1.8 percentage points.

On a standalone basis for all its services, Maersk was the most reliable of the top-13 carriers in February 2025. It achieved a schedule reliability of 60.2 percent. MSC followed at 57.4 percent and Hapag-Lloyd at 57.3 percent.

Maersk and Hapag-Lloyd in their financial reports highlighted forecasts for a down year in 2025 after strong results in 2024. Schedule reliability is poised to become an important selling tool for the alliances as they seek new competitive advances in what promises to be a challenging year.