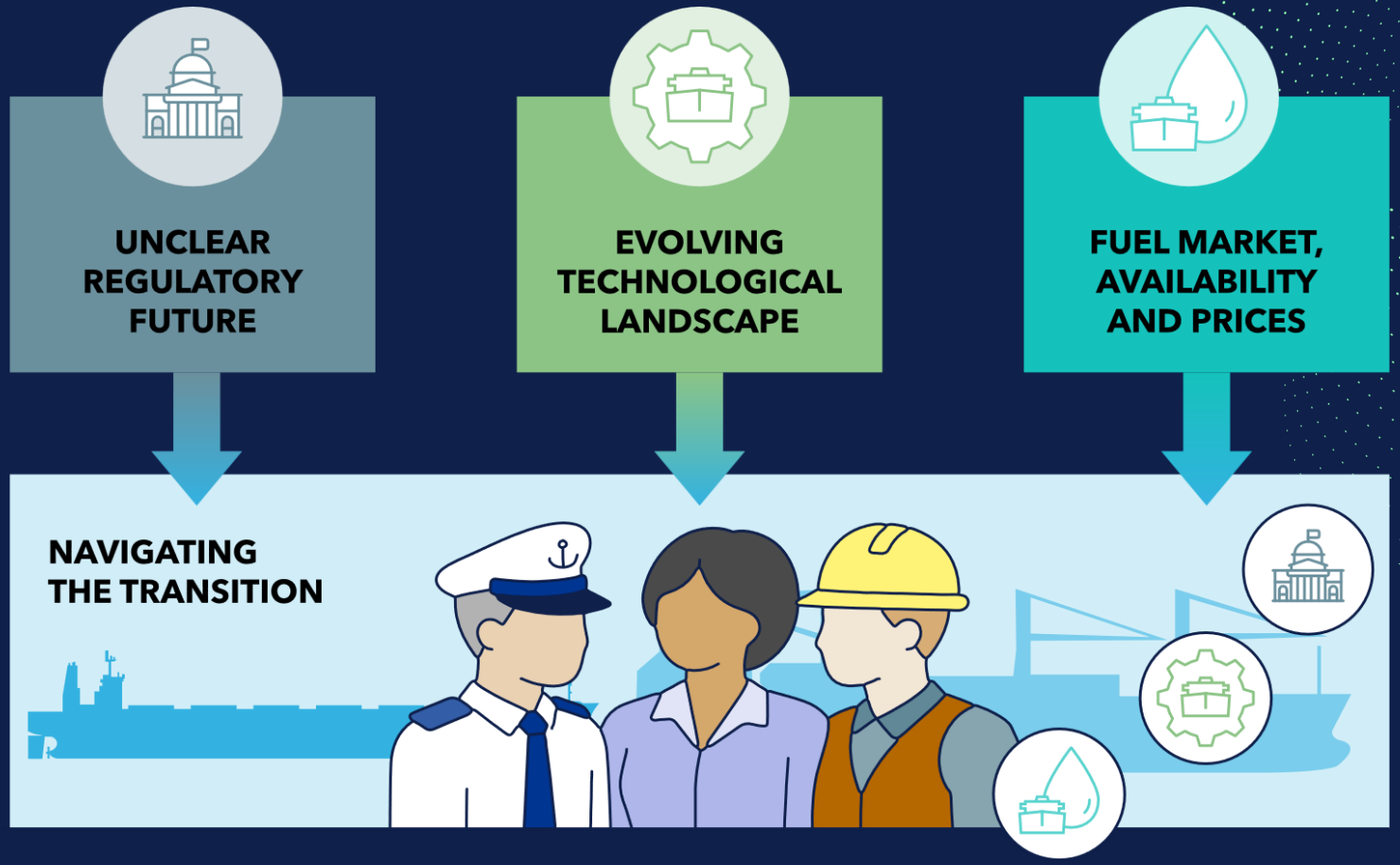
WHEN TRUST MATTERS

Maritime Forecast to 2050

Energy Transition Outlook 2026

Capital Link Shanghai 2026.10.20

Robust technology and fuel strategies are needed to navigate an uncertain transition



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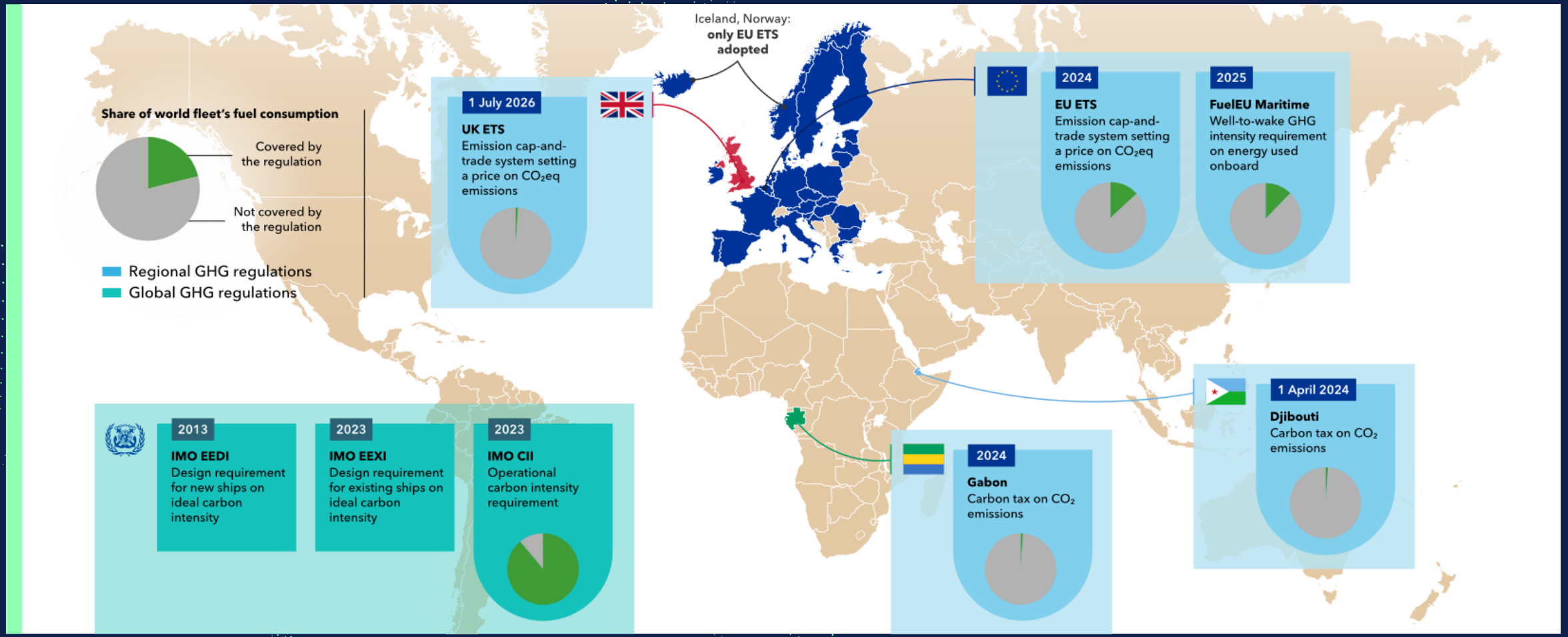
Regional regulations are moving ahead while global alignment lags



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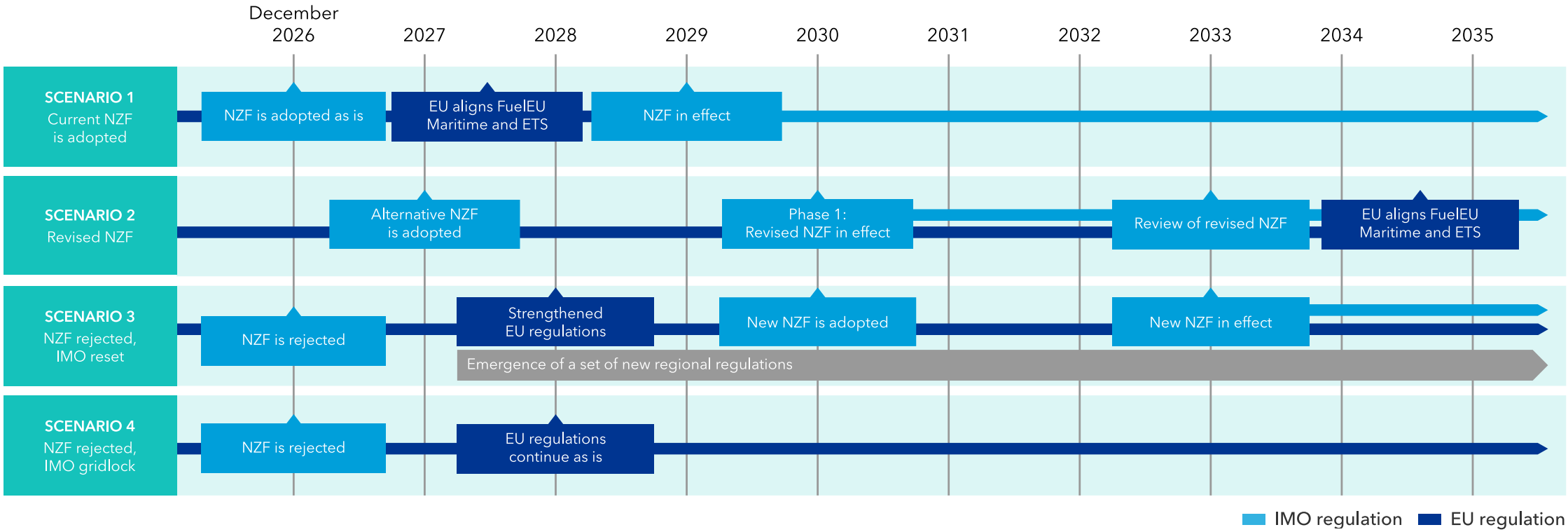
Multiple regulatory futures are possible, calling for robust strategies performing well across scenarios



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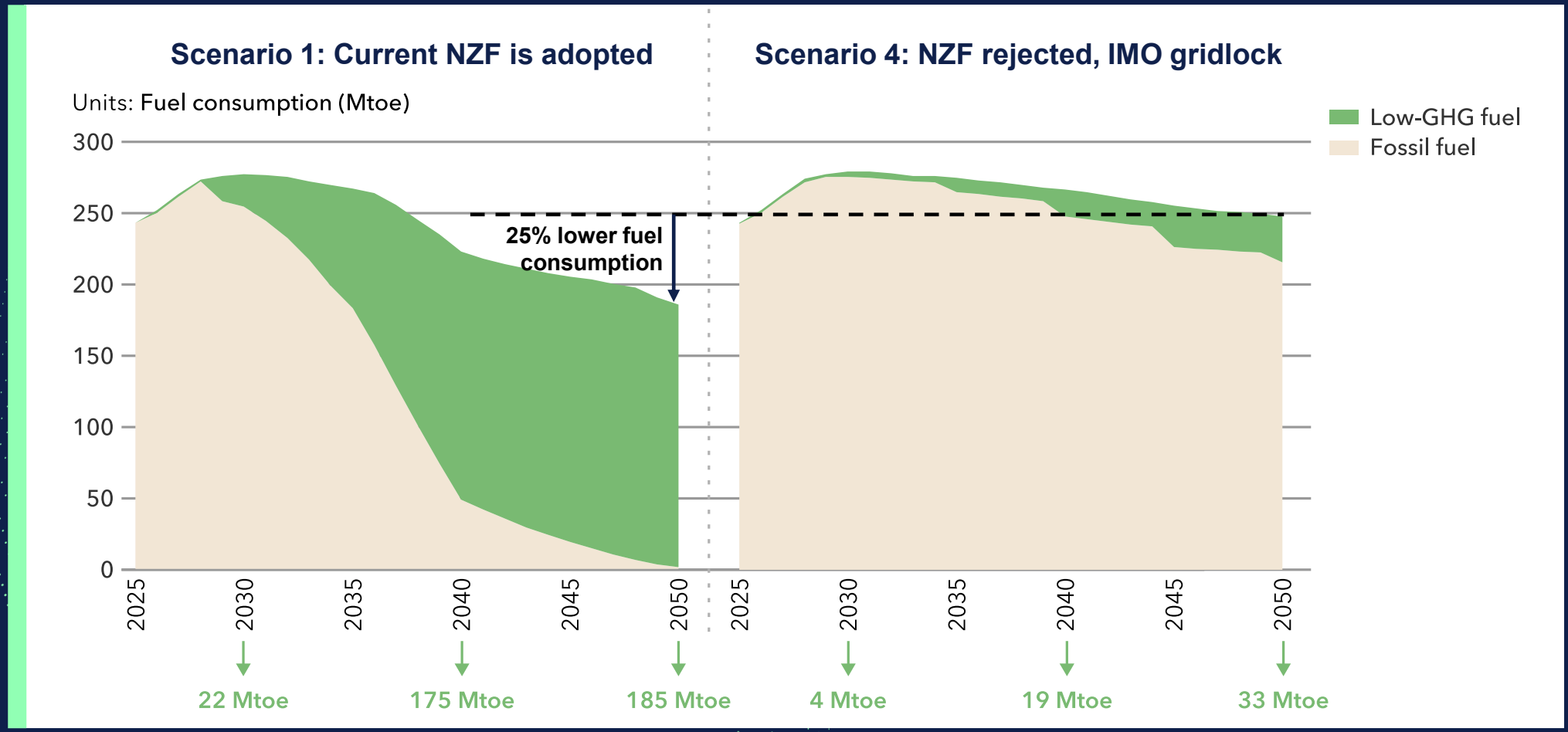
Regulatory future shapes low-GHG fuel demand ranging from 33 – 185 Mtoe in 2050



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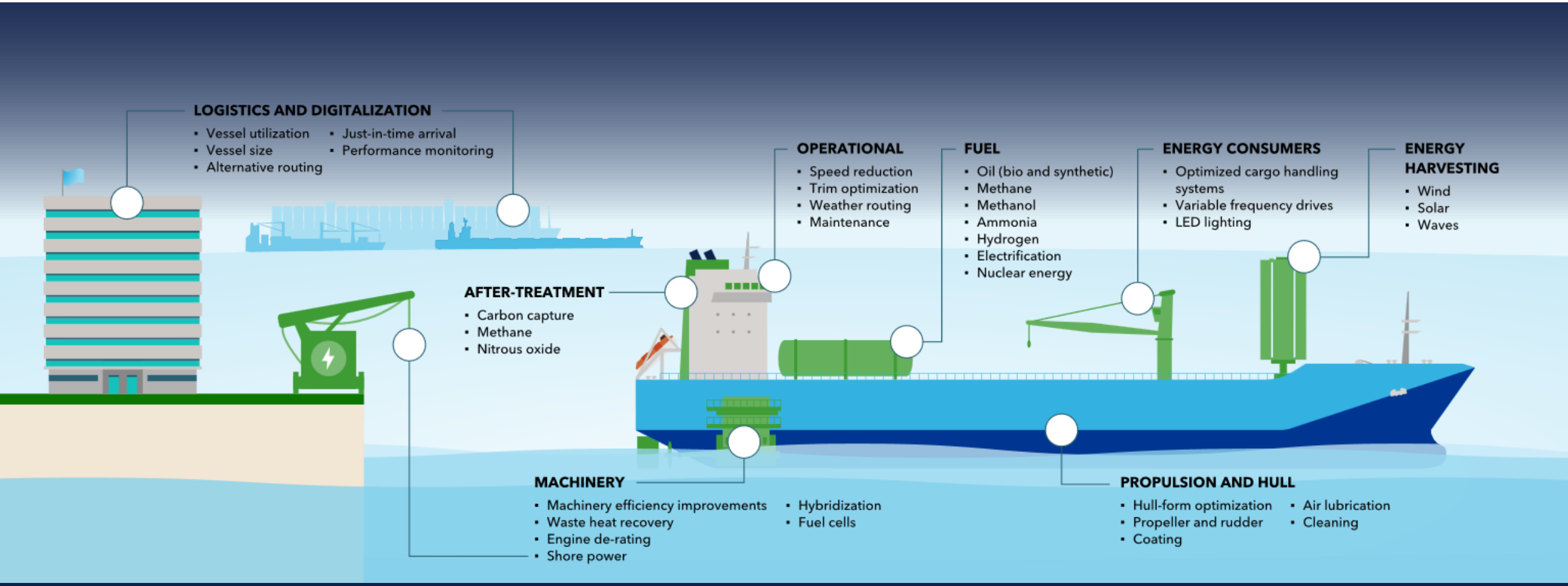
Global fleet could consume 25% less energy by 2050 with strong regulations



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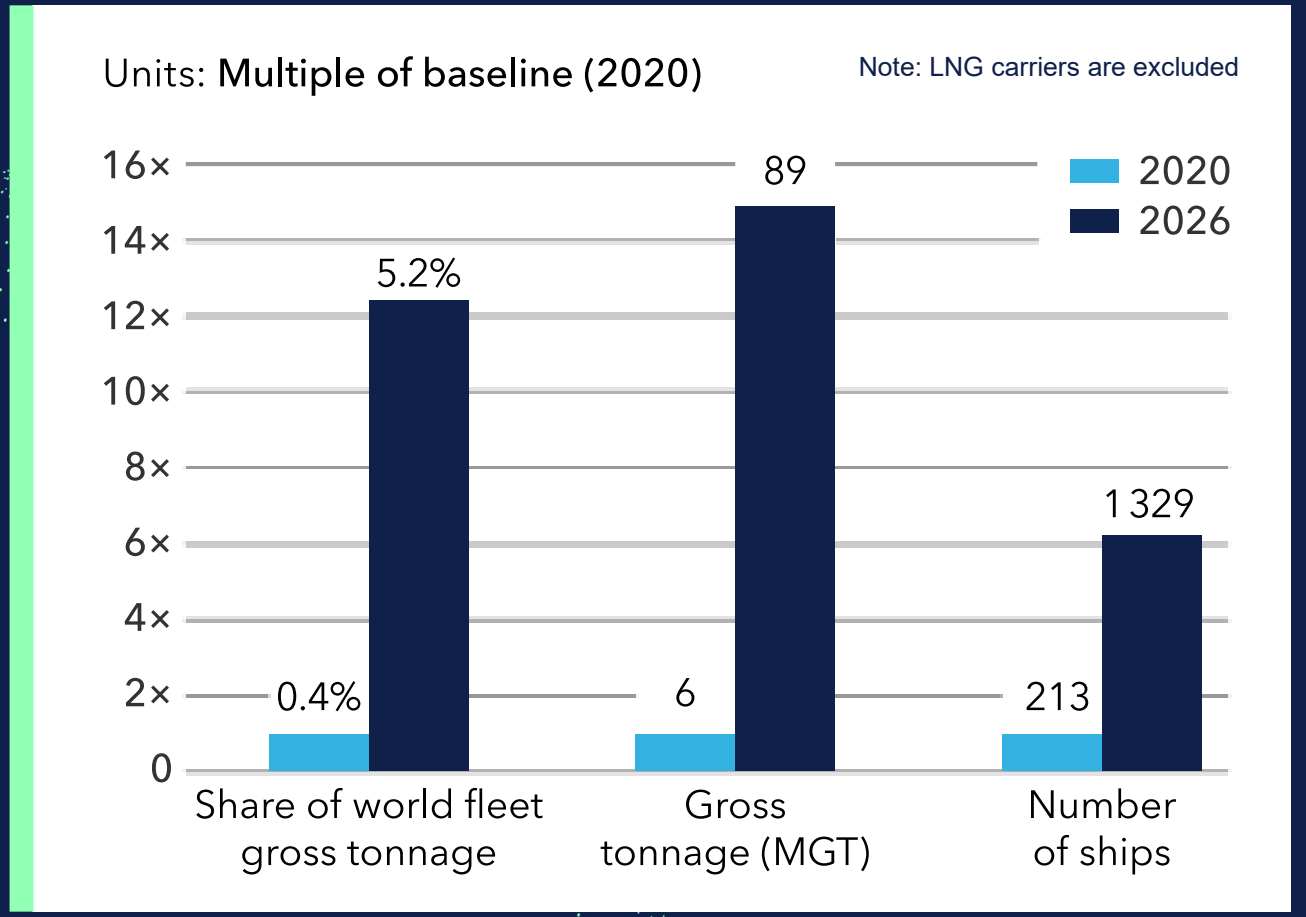
Alternative fuel capable tonnage has grown more than tenfold since 2020



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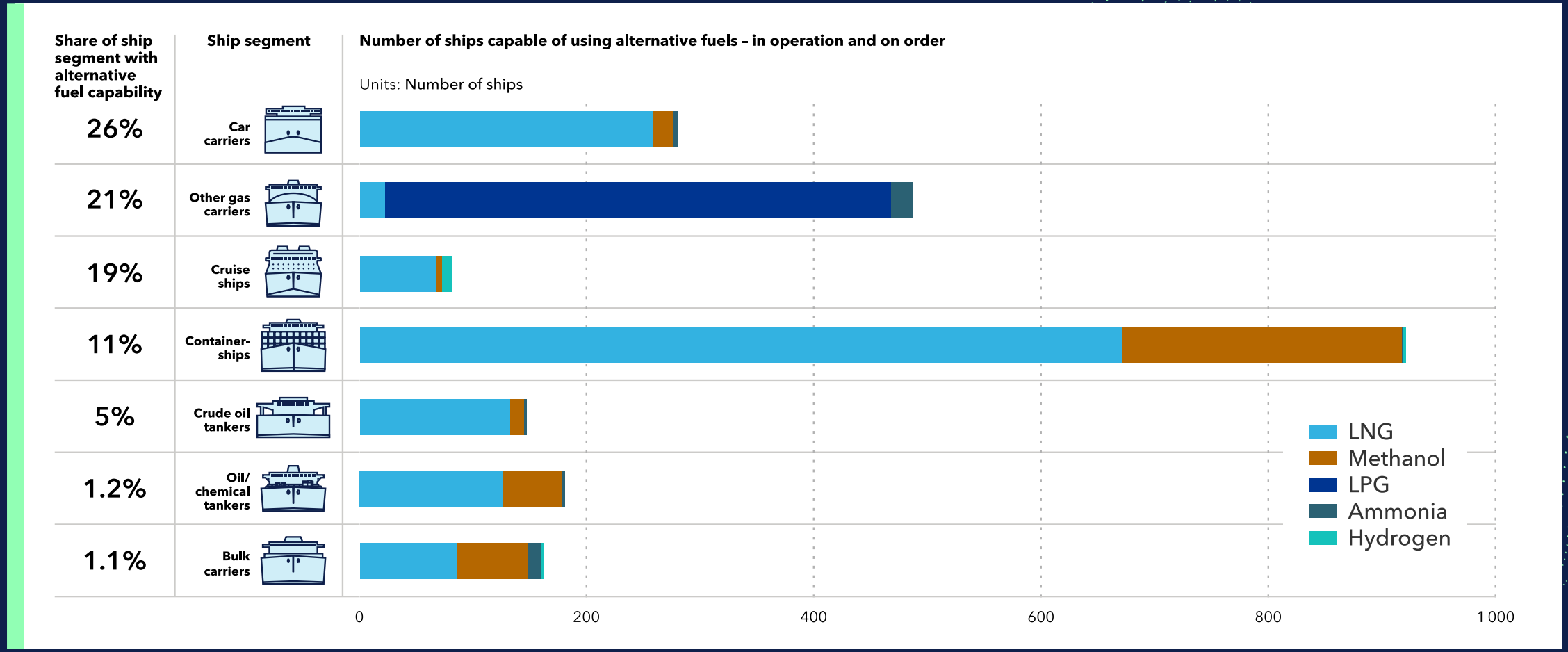
Alternative fuel capability remains uneven - ranging from 1% for bulk to 26% for car carriers



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Low-GHG fuels are already being bunkered in almost 90 ports

Reported low-GHG bunker operations by fuel-type

FAME and HVO (bio)

Liquefied bio-methane

Low-GHG methanol

Low-GHG ammonia

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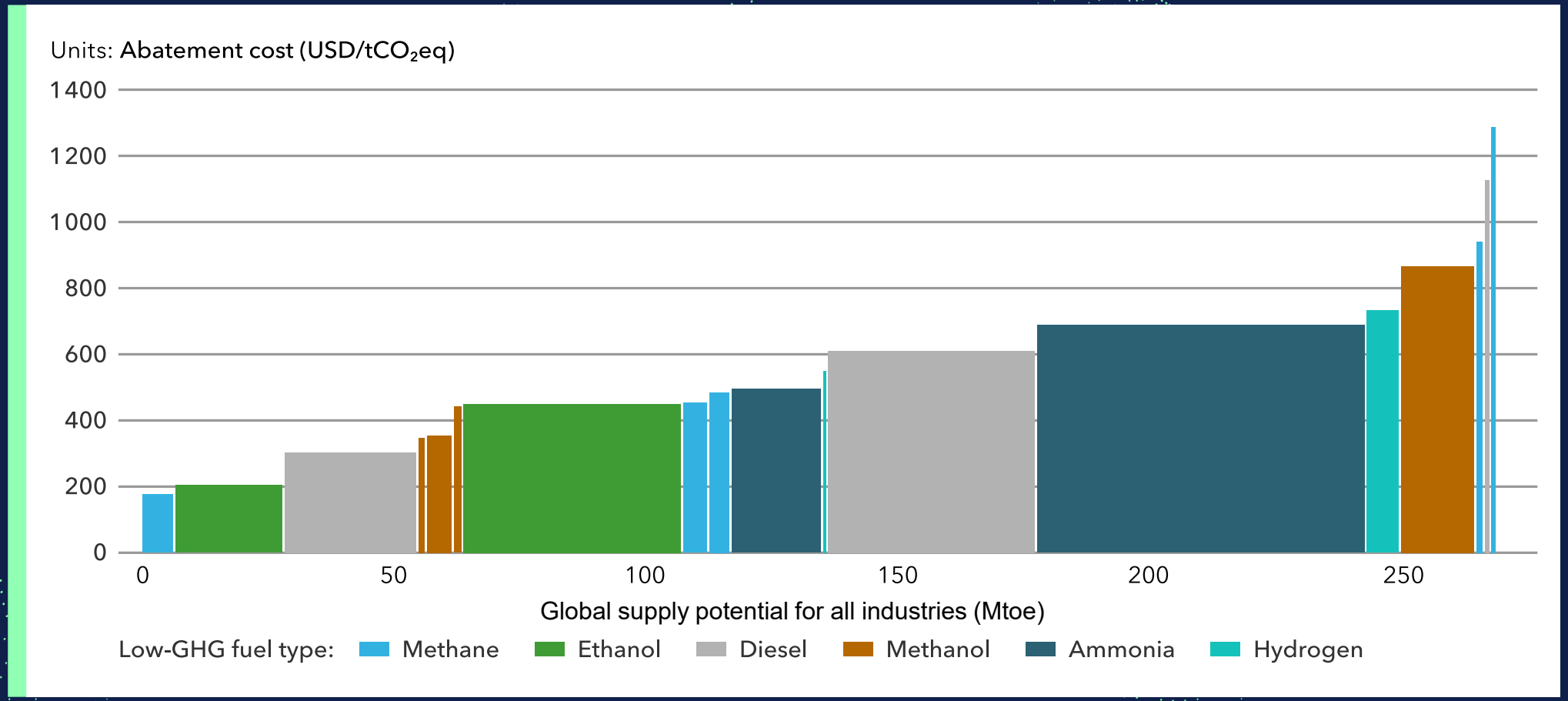
Decarbonizing with low-GHG fuels costs between 180-1290 USD per tonne CO_2eq not emitted in 2030

Estimated abatement cost for global maximum potential low-GHG fuel supply in 2030



Note: each shaded area above reflects one fuel production pathway

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To navigate the transition – use scenarios to stress test fuel and technology strategies

Baseline fleet

STEP 1	STEP 2	STEP 3
Fuel and technology strategies	Regulatory scenarios	Robustness check
Strategy A	Scenario X	Risk
Strategy B	Scenario Y	Cost

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Recommendations to shipowners

- **Accelerate energy efficiency** across existing ships and newbuilds
- **Consider all compliance options** where exposed to GHG regulations
- **Use scenario-based fleet planning** to guide fuel and technology strategy

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- Your Preferred Partner in the Decades of Transformation!

谢谢！

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