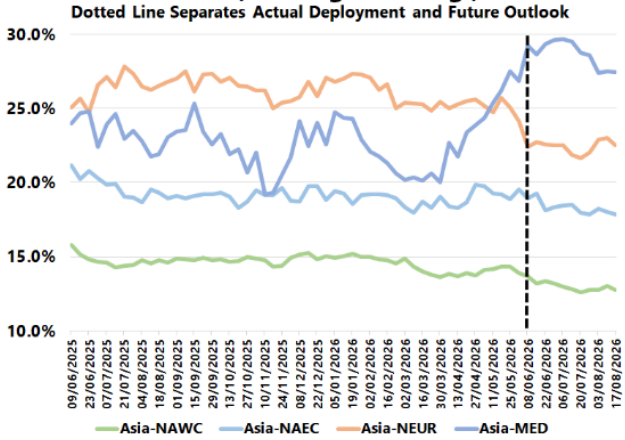
Decoding Gemini's Mediterranean Surge

In issue 768 of the Sea-Intelligence Sunday Spotlight, we analysed East/West container vessel deployment, revealing how Gemini Cooperation is executing a reallocation of their fleet. While headline figures show a broad loss of market share across major East/West trades, an 8-week running average in Figure B1 shows a deliberate network strategy: Gemini is systematically sacrificing capacity market share on the Transpacific and Asia-North Europe (Asia-NEUR) lanes to fund an aggressive offensive on Asia-Mediterranean (Asia-MED).

On the Asia-NEUR lane, Gemini's market share fell sharply from 25.7% in mid-May to 22.5% by June 2026. This drop was driven by a structural fleet downgrade on the AE3/NE3 service.

Fig. 1: Gemini's Weekly Capacity Market Share (Running 8WK Avg.)
Dotted Line Separates Actual Deployment and Future Outlook



Following a two-week blanking in early June, Gemini resumed the service by swapping out 18,000+ TEU vessels for smaller 14-15,000 TEU ones. This tactical downsizing trimmed weekly deployed capacity by roughly -5,500 TEU.

Conversely, Gemini flipped the script on the Asia-MED trade lane, where capacity market share is projected to increase to 29.7% by July 2026, up from a 23.4% baseline. This surge stems from a two-pronged strategy implemented in 2026-Q2: launching a fourth loop (AE19/SE4) utilizing 14,000 TEU vessels and structurally upgrading the AE15/SE3 service from a 13,100 TEU average to 18,400 TEU. In fact, the underlying data reveals a direct cascading mechanism: the 18,000 TEU vessels pulled from Asia-NEUR were directly re-routed to execute the Asia-MED upgrade. This injected a net +22,402 TEU weekly into the MED trade, yielding a dominant 28.1% capacity market share.

Ultimately, Gemini is consolidating their network to build a dense, high-frequency Asia-MED footprint, drawing a stark operational contrast to Ocean Alliance, which continues to expand capacity across all major trade lanes uniformly.

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