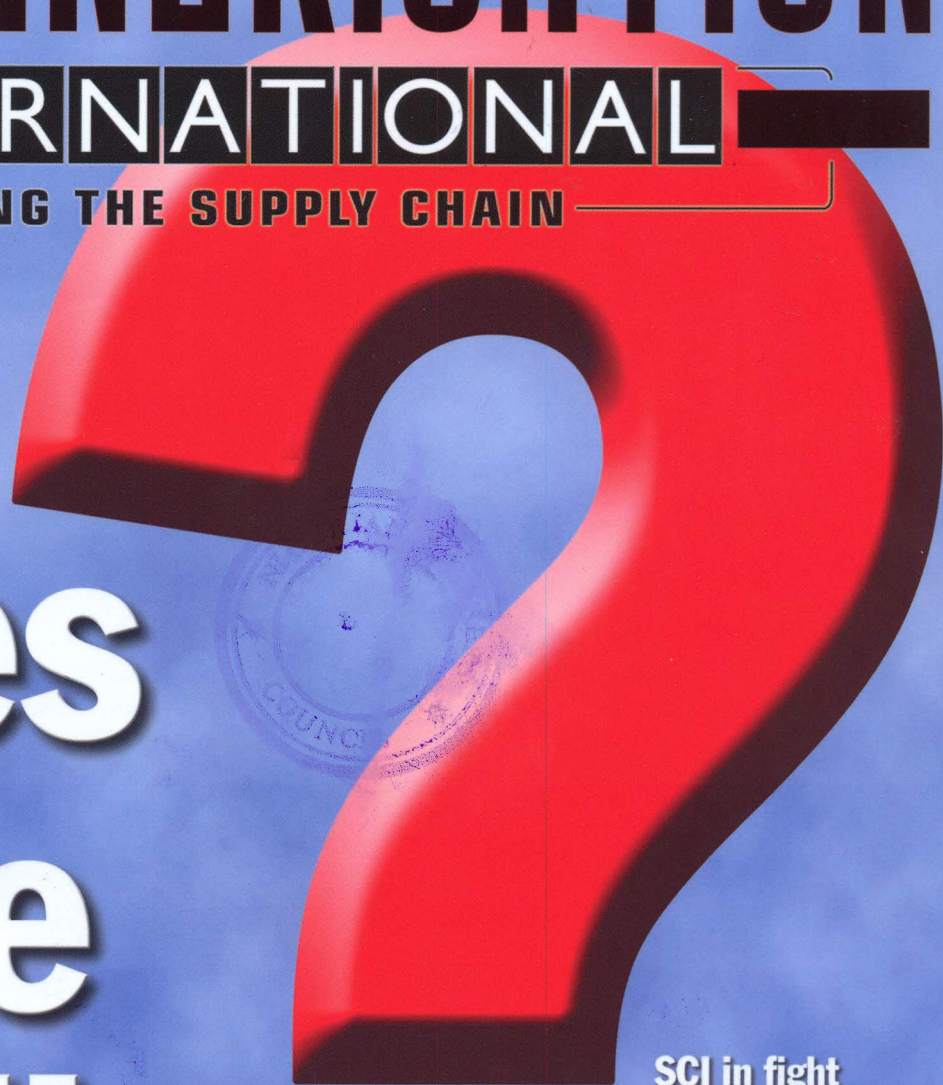


November 2009

# CONTAINERISATION

## INTERNATIONAL

LINKING THE SUPPLY CHAIN



# Does Size Really Matter

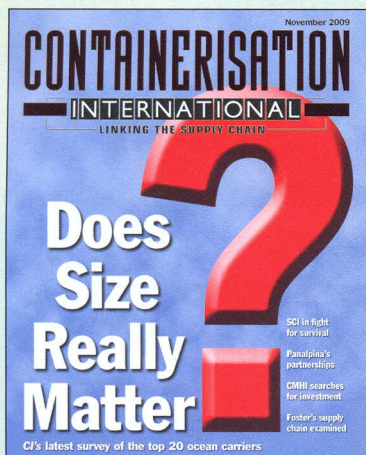
SCI in fight  
for survival

Panalpina's  
partnerships

CMHI searches  
for investment

Foster's supply  
chain examined

CI's latest survey of the top 20 ocean carriers



## 41 COVER

### Does size really matter?

Although ocean carriers have attached much cost-cutting credence to being able to get rid of unwanted charter vessel capacity this year, the reality has been very different so far. This is just one of the many conclusions to this year's *CI* analysis of the top 20's fleets in September.

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### Consortia Regulation – good or bad thing?

Chris Bourne, the executive director of ELAA, sifts through several issues highlighted by the European Commission's adoption of the Revised Consortia Regulation.

## FEATURES

### 48 ANALYSIS

#### Playing for peanuts

*CI* analyses the second division of liner shipping companies, exploring their operating strategies and assessing whether any have a realistic chance of entering the premier league.

### 51 ANALYSIS

#### Shippers' survey '09

Shippers have been calling the shots as the of recession takes its toll on ocean carriers, but how has this influenced relationships between importers/exporters and their transport providers? *CI*'s 'Shippers' survey '09' examines how things have changed.

### 59 CARRIER

#### Servicing the nation

The liner division of the Shipping Corporation of India is small and loss-making. But, it is committed to providing a competitive service to the nation. *CI* spoke to the head of the division.

### 60 LOGISTICS

#### Kindred spirits

Panalpina's ceo Monika Ribar, explains why Panalpina's financial performance should not be compared at face value with that of Kuehne+Nagel.

### 62 LOGISTICS

#### The X-mas factor

Kuehne+Nagel is UK home improvements retailer Homebase's global supply chain partner for its Christmas direct-to-store programme. As the scheme starts

its third year, *CI* spoke to both the retailer and freight forwarder to find out how the programme has been developed and enhanced since its inception.

### 65 LOGISTICS

#### A work in progress

The Sri Lanka council of the Chartered Institute of Logistics and Transport (CILT) has a series of plans that will help bring the nation into the 21st century when it comes to handling and processing freight. *CI* reports.

### 66 Shipper

#### The amber nectar

Foster's is one of the world's largest producers and shippers of wine. *CI* investigates the company's supply chain and the challenges that have to be overcome in ensuring that the product arrives safely, on time, and in good condition for the table.

### 68 INTERMODAL

#### All aboard the Mid-West

Chicago is the hub of North America's railroad system, yet it continues to be plagued by chronic congestion. *CI* analyses how west coast railroad operator BNSF is working to overcome these difficulties.

### 71 TERMINAL

#### Investing in the future

China Merchants Holdings International, which is a major operator of container terminals in China, is widening its search for investment opportunities. *CI* assesses the group's strategy.



Investing in the future (pp71-72)

## FOCUS ON THE MEDITERRANEAN

### 75 Focus

#### Miserable Mediterranean

The Mediterranean liner trades have been among the most depressed in the world this year with double-digit declines posted on most routes.

However, as the year has passed so things have started to improve and longer term there is genuine optimism about the region's prospects.

*CI* investigates.

### 77 Focus

#### Keen to go green

Although carbon foot-printing in Europe is becoming more important, rail transport in Italy still has much to do to compete more effectively against road transport.



### 81 Focus

#### A break from the past

There have been many false dawns in Trieste's drive to provide more competitive rail services into central and Eastern Europe, but the landscape finally appears to be changing, as *CI* reports.

### 85 Focus

#### Battle of the hubs

The Mediterranean basin is a battle ground for hub ports with more than 10 ports actively chasing ocean carriers' regional transshipment and interline business. But this traffic has held up better this year than local gateway exchanges.

### 87 POINT OF VIEW

#### A different way to do business

Two naval executives outline a novel way of dealing with the overtonnaging crisis in the liner shipping industry while simultaneously lowering supply chain costs.

## IN FUTURE ISSUES

*CI* reports on how ocean carrier behaviour has changed since the banning of conferences in the EU in 2008 and the ramifications this has for the rest of the world.

The managing director of China's largest shipping company COSCON tells *CI* about its future strategies and explains why the company sees China's domestic market as being of huge significance to it.

*CI* examines what ocean carriers have done so far to save the planet from global warming, and why environmentalists say that shippers should start getting used to the idea of longer transit times becoming a permanent feature of future services.

The Iberian peninsular plays a key part in the EC's 'Motorways of the Sea' project. *CI* looks at the progress that has been made to-date and the hope and aspirations for the future.

Dyson has become a household name in vacuum cleaners around the world and has since applied its cutting edge technology to hand dryers and fans. *CI* talks to its supply chain team and analyses the challenges of its global logistics operation and shipping needs.

*CI* investigates the strategies being adopted by Unilever, a shipper of fast-moving consumer goods, in moving into the emerging market of north and east Sri Lanka.

The use of rail to carry containerised cargo in China is set to explode as the country's national intermodal railyard programme comes to fruition and more manufacturing capacity is relocated inland. *CI* canvases the views of various service providers on the challenges and opportunities associated with using the mode in a bigger way.

While the Shanghai International Port Group (SIPG) is seeking investment opportunities in ports outside of China, it is also determined to develop Shanghai as a major regional hub for North East Asia. *CI* investigates the company's two-pronged strategy.

A little over four years ago the US ports of Los Angeles and Long Beach introduced their PierPASS programmes to reduce congestion by diverting traffic to use the gates at off-peak periods. *CI* examines the programme's success and its impact on other ports' capacity management initiatives.

*CI* looks at what some of Mexico's smaller stevedoring companies are doing to add value to their 'run of the mill' general cargo-handling services, including their desire to become more involved in the total supply chain.