

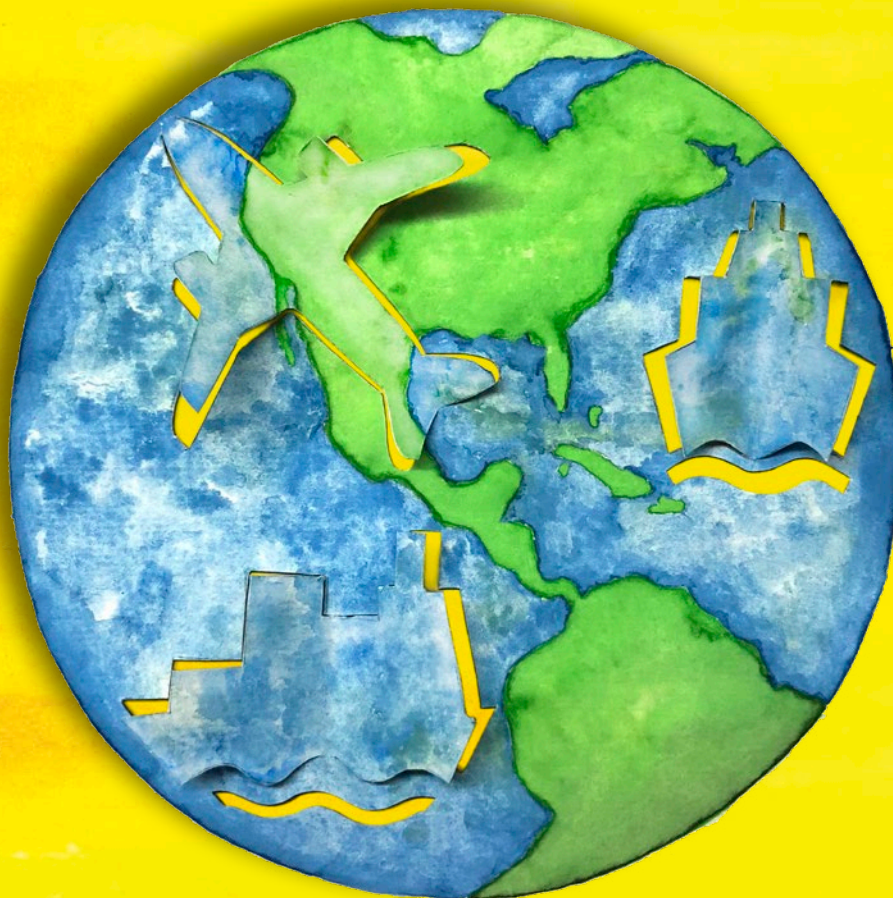
SPECIAL REPORT  
**GEORGIA**  
PATHWAYS TO PROGRESS

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THE MAGAZINE FOR DEMAND-DRIVEN LOGISTICS • MARCH 2018

## The Art of **GLOBAL TRADE**



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**MANAGEMENT SOLUTIONS**  
**E-COMMERCE** CHANGES  
THE LOGISTICS LANDSCAPE

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# THE BEST KEPT **SECRET** IN LOGISTICS

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**TRUE**

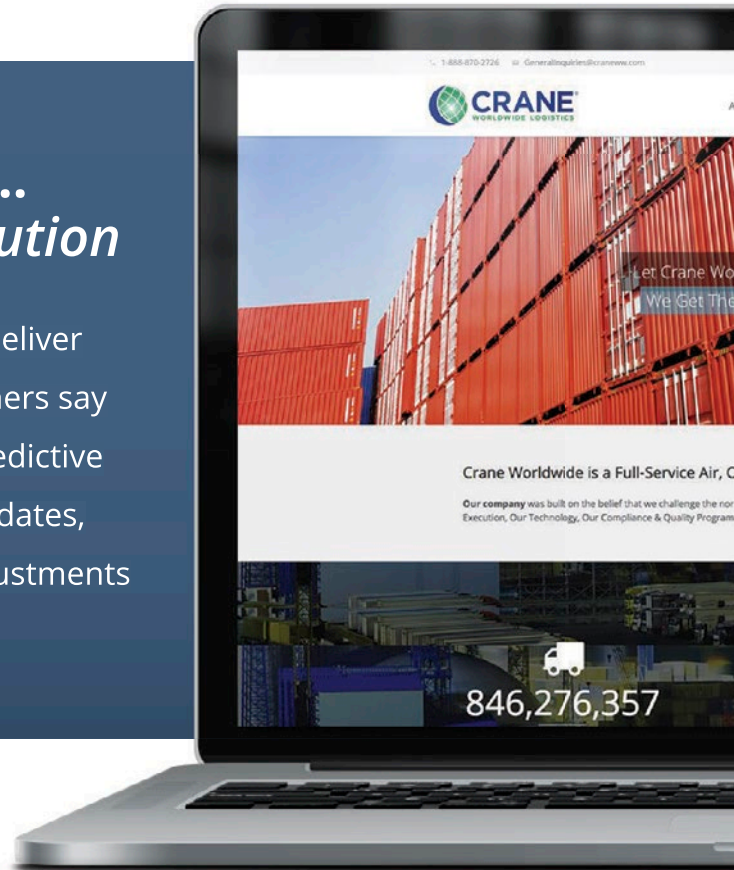
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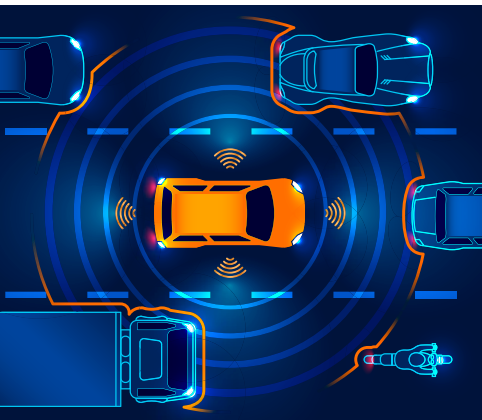
# info snacks

BITE SIZED SUPPLY CHAIN/LOGISTICS INFORMATION

## Hands on the Wheel

Millennials (18 to 25) are more leery of self-driving vehicles than older generations. Nearly half of millennials surveyed would not trust their car to automatically react to driving conditions; only one-third of drivers 65 or older responded that way.

—Solace survey of 1,500 connected car drivers



## Putting People First

“During the financial crisis of 2008-2009, we never reduced our staff. We knew we’d need those people going forward. It’s important to have the loyalty of our people and look at long-term growth and profitability, rather than just quarterly balance sheets.”

—Frank Guenzerodt, President and CEO, Dachser USA  
(See *Leadership*, p. 18)



**7,000  
meals daily**

were served in Pyeongchang during the Olympics, which equates to about 500,000 pounds of raw ingredients every 24 hours. To keep those meals coming, the organizing committee hired 180 chefs.

(See *Last Mile*, p. 112)

**NEARLY  
50%**

of the 300,000+ American businesses that import still use spreadsheets to manage their international supply chain.

—Freightos importing survey  
(See *Global*, p. 31)

## Changing Young Lives

“One parent came to me with tears in his eyes and thanked me for saving his son. He was worried that his son was going down the wrong path in life, but since taking this class he is now focused on graduating high school and excited about his future in transportation.”

—Dave Dein, discussing his Patterson High School truck driving program  
(See *Trends*, page 29)

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GALLONS

PER GALLON

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### Industrial Technology and the Supply Chain: Turning a Corner in 2018? [bit.ly/IndustrialTechnology](http://bit.ly/IndustrialTechnology)

With the right strategies and strong follow-through in place, organizations should find 2018 to be the year in which technology takes its rightful place as the catalyst for a new era in supply chain and manufacturing prosperity.



### Predictive Applications Take Supply Chains Into the Future [bit.ly/PredictiveApplications](http://bit.ly/PredictiveApplications)

Many companies handle supply chain anomalies with reactive planning systems that leave them vulnerable to disruption. Here's how to use machine learning to deal with uncertainty and predict what might go wrong.



### Three Transportation Innovations that Can Deliver Short-Term ROI [bit.ly/TransportationInnovations](http://bit.ly/TransportationInnovations)

Managing transportation has become increasingly challenging as customers grow more demanding and the driver shortage constrains capacity. Consider these innovations for short-term return on investment.

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by Keith Biondo | **Publisher**



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Vol. 38, No. 3

March 2018

**THE MAGAZINE FOR DEMAND-DRIVEN LOGISTICS**

[www.inboundlogistics.com](http://www.inboundlogistics.com)

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## Sky. Falling or Not?

**T**rade uncertainty. Tariffs. Protectionism. Retaliation. Supply chain disruption. What is happening? For the past year, we have been hearing shouted warnings that global trade as we know it will end in 2017...no, in 2018...no, in 2019.

“The future of the global trade system faces more risk and uncertainty than at any time since it was created after World War II,” according to *Foreign Policy Magazine* in February 2018. And, “European Commission Vice President Jyrki Katainen warns the United States against ‘global trade war’ on two fronts,” says *Politico Europe*.

There’s lots more where that came from, and we can generally sum up all the comments as “don’t rock the boat” or, more correctly, the container ship.

So what is behind all this commentary, concern, critique, caterwauling, and condemnation? Well, politics plays a big part. Politicians will energetically advance any narrative that they can use to attack their opponents. Clear-eyed communication, cooperation, and consensus building in the Beltway—on trade or any other topic—seems to be in short supply. That is not likely to change soon.

And then there is the blunt-force approach to trade that challenges the past 40 years of U.S. policy and globalism. Recent moves send the message that the architects of those policies could have been more diligent in guarding U.S. interests. That is an apolitical charge as both parties have been involved in crafting a “world is flat” approach to global trading relations.

That charge has some merit. The narrative is shifting in that direction, and not just here in the States. UK Prime Minister Theresa May wrote recently, “The nature of international trade means that decisions made by governments and businesses in one country can have a deep and lasting impact on workers half a world away.” She adds, “Any government that is serious about the economic prosperity and security of its people and businesses must have an international outlook, and must be prepared to reach out around the world and *secure agreements abroad that ensure jobs and prosperity at home*” (emphasis added).

Few are calling for the United States to not look after its economic interests more aggressively. The question is, what is the best way to ensure jobs and prosperity at home, whether in the United States, the UK, or other countries? In the shared goal of continued global trade growth and, importantly, true trade reciprocity, our policy makers and trading partners will sort out that question.

One way—the best way—to ensure jobs and prosperity in your enterprise in the face of these supply and business disruptions: Amp up your demand-driven logistics practices. Matching your demand more closely to your supply won’t keep the global sky from falling, but it will better position you and your company for survival when—or if—it does. ■



**Raul Fernandez**  
Account Specialist

**Michael Manito**  
Account Specialist

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# Good Question...

READERS WEIGH IN

## What advice would you give your younger self about supply chain management?

Sometimes improving on the establishment is right and sometimes disrupting it is. When people have pain using the leader's solution, improve. Otherwise, disrupt. Stay on the pulse of the supply chain. There is always an opportunity to improve and innovate.

**Evan Garber**  
CEO, EVS

Three things: First, never operate in a silo. Collaborate with other departments, suppliers, and service providers. Second, learn all you can about available technology solutions and never stop investing in tech. Third, always build contingency plans.

**Bill Goodgion**  
President  
Ascent Global Logistics

To treat each of my suppliers like my most important customers and understand their needs to make their lives easier. Steps like automating manual processes to save their time can make for a happier relationship and healthier business.

**Stanley Chia**  
Global Head of Sales  
Tungsten Network

I would encourage my younger self to embrace a forward-thinking attitude, strategic planning, and change management. I've learned broader, long-term business goals, and focusing your time and efforts on planning for those goals, are the real foundation of a successful supply chain.

**Mick McGroary**  
VP Strategic Accounts  
Sunset Transportation



Get as much knowledge from a senior supply chain manager as you can; hands on is the best knowledge ever.

**John Williams**  
Outbound Logistics Manager  
Toys"R"Us

Don't get distracted by flashy analytics, business intelligence, and control tower systems, which provide rear-view-mirror information on what has happened. Instead, focus on forward-looking planning and scheduling solutions that calculate and optimize your plan KPIs before you execute them.

**Robert Oliver**  
Solutions Architect  
Quintiq

I would tell myself that supply chain management touches all parts of the business and should be led at the executive level first to ensure synchronization across the organization. SCM is no longer just a cost of doing business; it can be a competitive advantage.

**Mike Rader**  
Vice President & Partner  
enVista

I would advise my younger self to never be afraid of questioning what you doubt even a bit.

**Anwaar ul Haq**  
Air Freight, Land Transport  
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### HAVE A GREAT ANSWER TO A GOOD QUESTION?

Be sure to participate next month. We want to know:

### What's the most fun part about working in the supply chain?

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## Prepare for Blockchain

Blockchain's capacity to store and share data, creating immutable records that follow a container throughout its lifecycle, make the supply chain more transparent, efficient, and safe—particularly for sensitive goods, such as pharmaceuticals. Additionally, accepting payments in cryptocurrency reduces processing times and transaction costs substantially. The possibilities for blockchain to modernize logistics are endless.

**Richard Ettl**  
Co-Founder and CEO  
Smart Containers Group

### Should ELD Information Be Used to Bill Back Shippers for Excess Dwell Time?

Despite the potential value of ELD (electronic logging device) data for dwell time charges, many other factors are involved in determining if these events are billable, including appointment times, receiving windows, contracts, paperwork trails, and guard shack check-ins.

Nevertheless, when ELD is GPS enabled, it improves transparency and visibility, providing insights into the causes and costs of dwell time, as well as other inefficiencies.

**Dave Giblin**  
Vice President-Transportation  
Management, ODW Logistics

## Steel and Aluminum Tariffs: What's the Long-Term Impact?

The administration has taken an isolationist view of the world with the main goal of blocking China—and its satellite markets like Vietnam and Malaysia—from becoming great economic powers. In fact, I expect tariffs to expand to encompass most goods from China, as well as to spread in a way that limits Asian investment in U.S. markets overall.

The administration is not thinking through the second-order effects, which include higher prices of American-made goods and raw materials. Increasing raw material prices will cause companies to either go out of business or ship their manufacturing off to an unaffected country to get around those tariffs, ultimately leaving those companies in a position of having to take an "all or nothing" approach to manufacturing in the United States.

**Chris Rogers**  
Research Analyst, Panjiva

This move is entirely self-defeating. If the United States moves forward with these tariffs, we will become

less dependent on outside steel and aluminum, but it will also cause the prices of these goods to rise.

Americans may be willing to pay a premium for American-made goods, but that only goes so far. Ultimately, I expect the cost of U.S. labor to push the price of American-made steel and aluminum so high that U.S.-based companies will be forced to invest in automated machines that can produce the metals, rather than hiring humans and supporting the creation of American jobs.

In terms of the supply chain, I don't expect to see much of a change in the short term—contracts with suppliers and partners are long, and it takes a long time for brands to ramp up any revisions.

We may see some upward pressure on the price of goods because of the disruption, but real change will take longer to happen. When it does, it will likely be in the form of manufacturers moving plants to countries not affected by these tariffs to lower costs.

**Nick Foy**  
Chief Strategy Officer, ModusLink

## Providing Excellent Customer Experience

*Re: CX in the Era of Supply Chain Impatience by IL Publisher Keith Biondo* [bit.ly/CXinSCimpatience](http://bit.ly/CXinSCimpatience)

Taking a system approach to analyze your supply chain velocity will improve on-time performance, lower manufacturing and distribution costs,

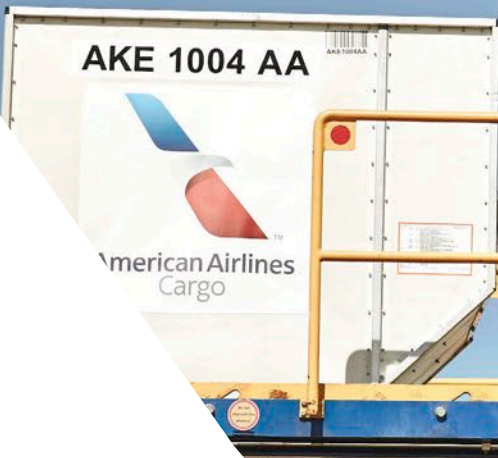
and increase customer satisfaction scores. If your supply chain can't perform, then you risk increased competition from companies that can deliver—literally and figuratively.

**Marshal Oller, Program/Project Manager, via LinkedIn**

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# 10 TIPS

## STEP-BY-STEP SOLUTIONS



## Increasing Supply Chain Visibility

In our “now” economy, consumers demand real-time visibility, along with the near-immediate delivery of goods. This has created a great deal of supply chain disruption, causing businesses to reevaluate the way they operate. Gary Allen, vice president of supply chain excellence at Ryder, provides tips on how to achieve end-to-end visibility, and ultimately ensure a more efficient supply chain.

**1 Start with the experience.** Begin by defining what visibility means to your end users/customers, what kind of experience you want them to have, and what you want to gain from increased visibility.

**2 Select a platform for connectivity.** Your digital platform should connect key players. This means ensuring the platform is technologically agnostic and all intended parties can easily access it.

**3 Attract the right talent.** New technology enables both new processes and new talent. Recruit people who are analytically inclined and highly skilled at interpreting data.

**4 Manage and standardize data.** Having a clear data strategy is imperative. Cleansing and defining consistent data models allows you to consistently utilize and translate the data into meaningful information.

**5 Trust the information.** It’s critical to believe the data. You must trust the information, its security, and the entities you exchange information with. Find ways to confirm confidentiality and ensure security around the financial exchange of information.

**6 Interpret and leverage figures.** You can’t find ways to improve until you know what problems to solve. Data allows you to proactively manage exceptions before they occur, saving your business time and money while keeping customers happy.

**7 Drive efficient decision-making.** Once you discover opportunities for improvement, you have to respond to those needs. Now that you know where everything is across your supply chain, you can execute solutions.

**8 Focus on real-time transparency.** The frequency and size of data exchange is dramatically increasing at an accelerated rate. Being able to leverage this data in real time is imperative. The key enablers consist of understanding what data is most critical to solving key business problems, what it means, and what to do when exceptions occur.

**9 Opt for a neutral integration platform.** The ability to flex up or down, quickly adjust, and accelerate the development of new capabilities requires an Enterprise Integration Platform. This allows companies to easily integrate, regardless of the execution systems in play.

**10 Develop an extended ecosystem.** Assuming you can develop and own all these capabilities offers a false sense of security. Today’s new digital environment requires a collaborative approach to managing your supply chain. Developing an extended ecosystem that brings the best of all your partners’ capabilities into a single environment is vital. ■





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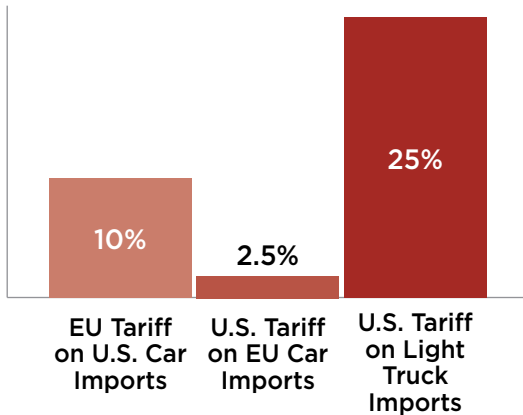
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NEWS & TRENDS IMPACTING THE

## AUTO SUPPLY CHAIN

### AUTO TARIFFS: U.S. PAYS THE PRICE

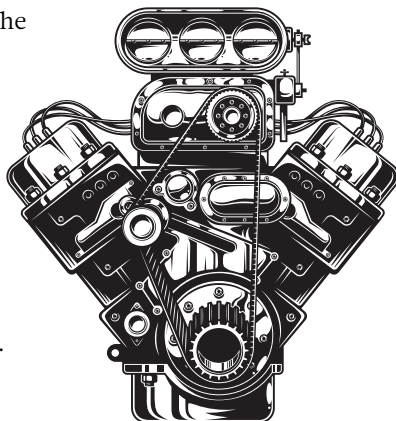


Citing a “big trade imbalance,” President Trump has threatened to place a tax on vehicles imported into the United States from Europe. In fact, such a tax already exists—a relic from a trade war fought in the 1950s. Consumers already absorb a 2.5-percent tariff on cars and a whopping 25-percent tariff on light trucks imported into the United States.

### SPOTTING A FAKE

German automotive products companies are using a cloud-based, track-and-trace solution from Honeywell to detect counterfeit products globally.

Honeywell collaborated with automotive aftermarket provider TecAlliance to develop the *oneIDentity+* service platform, which authenticates and tracks individual components for major auto parts manufacturers. The platform assigns each component a specific digital ID label that users can track with a mobile device from at any point—whether it is loaded onto a truck, unloaded at a distribution center, or shipped to an end user.



### “NO ONE WINS A TRADE WAR”

“More tariffs won’t help American businesses or families. Tariffs are taxes, and the result will be more expensive vehicles—effectively erasing any positive change Americans saw from the 2018 tax reform bill. Auto sales, which are already slowing, will be hamstrung by these tariffs. America’s 2,500 European branded dealerships and their 175,000 employees will be less competitive. The resulting trade war will undoubtedly spread to include other industries, including American agriculture. No one wins a trade war.”

—American International Automobile Dealers Association President and CEO Cody Lusk regarding a brewing trade conflict with the European Union

### INBOUND SUPPLY BEST PRACTICES

Automotive suppliers should have in place the following critical supply chain capabilities and activities to comply with customer contract requirements and execute perfect supply fulfillment:

- Lean manufacturing and logistics practices.
- Replenishment processes, procedures, and policies that ensure high-quality, low-cost, on-time deliveries throughout the extended supply chain.
- Electronic communication between suppliers and customers (zero latency preferred).
- Demand analytics around EDI transaction sets 830, 862, 866, as well as any web-based electronic communication.
- Real time collaborative communication throughout the supply chain to address potential issues in meeting demand requirements.
- Ability to react to weekly schedule variation, comparing demand to capacity.
- Ship according to a latest set of transportation routing instructions.
- Real-time response to alerts, issues, and exceptions.
- Repeatable processes that minimize human intervention including continuous process measurement and reporting.
- Weekly or monthly identification and measurement of key trending metrics, with corrective action planning to address metrics that don’t meet goals.

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# LEADERSHIP

*Conversations With  
The Captains of Industry*

By Merrill Douglas



**Frank Guenzerodt**  
President and CEO  
Dachser USA

## Running a Global Organization Like Family

**W**HEN FRANK GUENZERODT JOINED Dachser USA as its president and CEO in 2004, this U.S. unit of the German-based global logistics firm was bringing in \$11 million annually. By 2016, annual revenues had ballooned to \$181 million.

That strong growth has continued, and Guenzerodt expects to see even more of it in the next few years, both in geography and sales. “At the moment, Dachser has 16 locations in the United States,” he says. “Our goal is to reach 23 to 25 locations by 2020.”

Here’s more of what Guenzerodt told us about his current activities at Dachser USA, his plans for the future, and the experiences that helped shape him as a leader.

**IL: How did you start working in transportation and logistics, and why have you stayed in the industry?**

I started in Germany with an apprenticeship in freight forwarding. I planned eventually to earn a master’s degree. But then, in 1986, the company enticed me with an opportunity to work in the United States. Although I planned to stay for just a couple of years, I’ve been in the United States ever since, and I’ve remained in the industry.

The leadership style in the United States is markedly different than it is in Germany because it’s more oriented toward

building and motivating teams. That fits my personality well. I stayed in logistics because it’s an interesting field. I do a lot of international travel and get exposed to many cultures. And it’s an always-changing environment, with different challenges every day.

**IL: What are the biggest changes you’ve seen in the industry over the course of your career?**

Technology has changed incredibly in the 30-plus years I’ve worked in transportation and logistics. When I started, we used telex machines to exchange information. Now high-end computers and wireless systems provide an automated flow of data among countries and between companies and government agencies.

Containerization has expanded, of course; we use it almost exclusively these days. And container vessels have grown increasingly larger. But the biggest changes have been in information technology.

**IL: What are the major industry issues you face today?**

Keeping up with the speed of IT development is important, especially for a large, global organization like Dachser. We have to stay on the cutting edge of technology to compete with what some call the “Uberization” of freight. That’s not a huge threat to us in the short term, but it may be in the mid to long term, as those companies that are trying to turn transportation into a commodity become more sophisticated.

**IL: How are you dealing with this threat of Uberization?**

We do it by becoming more integrated with our customers. We used to be in the freight forwarding business, serving as sort of a travel agent for freight. But moving freight from Point A to Point B is not enough anymore. We've evolved over the years into supply chain experts, managing complete logistics challenges for customers.

We help with sourcing, inventory management, just-in-time deliveries, and contract logistics, and with warehouse and pick-and-pack solutions. We focus on doing much more than transportation: We manage complex, intermodal supply chains for global customers. Along with that goes IT development and interfacing our IT with our clients' systems. That's the only path to the future, apart from pure point-to-point transportation, which is becoming more commoditized.

**IL: Tell us about a difficult logistics challenge you faced in your career and how you overcame it.**

In my early days in the United States, I did a lot of business with an airline that had purchased another airline and had to re-equip ground stations in 50 different places in Latin America. When that client asked for pricing, they wanted it immediately, for budgeting purposes. To respond quickly enough, I had to estimate a price.

The number was based on my experience in that particular market, but I was also sticking my neck out to come up with a figure so quickly. It worked out well. The customer was looking for speed, not the lowest price. The key to making this work was to build a relationship, so they would trust us to provide professional service and accurate information. Maintaining a relationship is often more important than being the cheapest provider on the market.

**IL: How would you describe your leadership style?**

I have mostly worked in companies that were building up organizations in the United States, so there has always been a lot of development to do, including hiring and team building. Accessibility, entrepreneurship, and a focus on growing teams and building team spirit are most important. As Steve Jobs said, "It doesn't make sense to hire smart people and tell them what to do; we hire smart people so they can tell us what to do."

**IL: What kind of corporate culture do you foster?**

While Dachser is a large, global organization, it's also a family-owned company with a strong emphasis on family values. The focus is on attracting the best team members and then looking after them. During the financial crisis of 2008-2009, we never reduced our staff. Just because we hit a couple of bumps in the road didn't mean we wanted to reduce our payroll, when we knew we were going to need those people going forward. It's important to have the loyalty of our people and look at long-term growth and profitability, rather than just quarterly balance sheets.

**IL: What makes for a great day at Dachser?**

The best days come when we win large customers based on out-of-the-box thinking to offer solutions that never occurred to our competitors.

**IL: How do you like to spend your time outside of work?**

Now that my wife and I are empty nesters and have finished paying for our kids' college educations, we enjoy traveling. Often when I travel on business, all I see is an airport, a hotel, and various conference rooms. It's nice to visit some of those places when you're on vacation. ■

## Get Your Passport Ready

"Be flexible." That's Frank Guenzerodt's advice to someone launching a logistics career today. In particular, he recommends young people stay flexible about where in the world they want to work.

"We import selected people from overseas for a one- or two-year assignment, especially for business development," Guenzerodt says. As Dachser USA helps customers with shipments to and from spots all around the globe, it's extremely helpful to have people on the team with an intimate knowledge of other countries and languages.

Dachser also needs Americans to bring their homegrown knowledge to other markets. "I wish we could motivate more Americans to go to China or Europe for a work assignment," Guenzerodt says. "To build a career and gain experience, I would suggest that people include a few years of work overseas."



**Mike Parsley is senior vice president of distribution with Tailored Brands, Inc., a U.S.-based retail holding company for Men's Wearhouse, Jos. A. Bank, and other men's apparel brands.**

**RESPONSIBILITIES**

E-commerce and retail distribution, transportation and logistics; national tailoring service and tuxedo distribution.

**EXPERIENCE**

Vice president, operations, Macy's; senior director, distribution, Men's Wearhouse; senior operations manager, Amazon; director, operations, Vistaprint; president and operational roles, H.P. Reid; instructor, Embry-Riddle Aeronautical University.

**EDUCATION**

M.S., aerospace engineering, Embry-Riddle Aeronautical University, 1992; B.S., chemistry and mathematics, Cumberland College, 1989.

## Mike Parsley: Supply Chain Suits Him Well

ONE SIGNIFICANT INITIATIVE WITHIN TAILORED Brands is boosting speed to market. We're trying to identify opportunities throughout the supply chain to reduce lead times and move new fashions, online orders, and retail products to customers faster.

We're also trying to boost speed to market for our offshore, made-to-measure/custom suits and shirts, which we began offering in 2017. Changing from mass manufacturing to individual unit manufacturing requires a different mindset. For instance, the suits and shirts come from different factories. At a distribution center, we marry the suit to a shirt, and quickly ship both to our stores.

I'm proud of the integration between Men's Wearhouse and Jos. A. Bank. When we acquired Jos. A. Bank, we gained nearly

two million square feet in the northeast United States; we already had two million square feet of distribution space in Houston. We did a full analysis of cost, transportation times, and other factors and justified moving to a regional distribution strategy. Now, both locations can move product for either brand, which significantly improves overall operations.

We also implemented a warehouse management system in only nine months—typically an 18-month process. And as we integrated Jos. A. Bank and its national

### The Big Questions

**What activities make you better at supply chain management?**

Golf helps by teaching patience. Also, riding motorcycles requires taking multiple inputs in real time and processing them quickly.

**What song best describes your job?**

"Beth" by KISS. The lyrics, "Beth, I hear you calling but I can't come home right now/Me and the boys are playing and just can't find the sound" relate to the supply chain as teams sometimes work

long hours to make sure everything is happening as it should. The calmness of the ballad is symbolic of how to run a supply chain. You need to analyze data, plan, and remain calm as you execute.

**If you could speed up the development of a disruptive technology, what technology would it be and why?**

Blockchain. This technology allows everyone to see information and changes electronically and in an extremely secure format. This greatly simplifies the process.

tailoring service into our transportation network, we shifted them from parcel to fleet transportation. That move cuts costs and improves efficiencies.

One key was maintaining strong relationships with IT, human resources, and the operations teams from both Men's Wearhouse and Jos. A. Bank. Involving all the groups up front, and encouraging communication and teamwork, enabled a smooth transition.

We have two merchandising groups, as well as a design and global sourcing group in New York. Orders for retail apparel products are cut six months in advance.

It's important to get everybody on the same page and get the timing right so product flows in the directions we want, and store replenishment occurs when needed.

Because we put both brands in the same container, we work with our carriers and international sourcing team to split containers. These efforts accounted for about 25 percent of the \$100 million in synergies forecast by combining the two brands.

About the time I earned my master's degree in aerospace engineering, the defense industry crashed. So, I joined a manufacturing company and advanced rapidly.

Several years later, the company's facilities relocated overseas. I stayed in the United States and landed a position with Amazon, where I gained a great deal of knowledge about distribution and fulfillment.

I enjoy distribution and fulfillment, and at Tailored Brands, I can continue to do those functions and be strategic as well. I'm implementing an RFID project with our national tailoring services and looking at robotics technology for the warehouses.

My key focus is on optimizing the network and creating the best environment we can for our associates. ■

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 **The Customer**  
 **The Customer**

**Service**  
 **Service**  
 **Service**

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# NOTED

THE SUPPLY CHAIN IN BRIEF

## SEALED DEALS

**Jamba Juice**, which serves up smoothies, bowls, juices, boosts, snacks, and meal replacements, renewed its license with **ArrowStream's OnDemand**, a software-as-a-service solution that captures and resolves supply chain issues. Jamba Juice's supply chain team uses *OnDemand* to support inventory monitoring, price compliance, and contract and supplier management.



## m&a

**RoadOne IntermodaLogistics**, an intermodal, distribution, and logistics service company, acquired **Jarvis Trans**, an intermodal transportation company serving the greater New England region including Boston. The acquisition allows RoadOne to address pressing issues confronting the intermodal drayage sector including a shortage of qualified drivers, the effects of federally mandated electronic logging device implementation, port-mandated clean trucks, and finding experienced operational staff.



Jewelry maker **PANDORA** chose an advanced planning solution from **Quintiq**, a Dassault Systèmes company and provider of supply chain planning and optimization solutions. The jeweler selected Quintiq to provide real-time

visibility into production and improve operational efficiency, supporting its capacity expansion program and increasing agility.

Watermelon producer and shipper **Melon 1** and pallet provider **CHEP** expanded their partnership to include on-site pallet storage and international shipments to support a circular supply chain. For its international shipments, launched in January 2018, Melon 1 moves watermelons from Central America to the United States on CHEP pallets. The program helps Melon 1 provide the fresh watermelons retailers need beyond the peak harvest season in the United States.



## GREEN SEEDS

Logistics solutions provider **Sonwil Distribution Center** deployed an Orange EV T-Series pure-electric terminal truck at the company's 300,000-square-foot warehouse and distribution center in Buffalo, New York. Eliminating emissions and reducing maintenance costs, the Orange EV electric yard truck demonstrates Sonwil's ongoing commitment to environmental sustainability.



**GOOD WORKS**



In March 2018, 85 **DHL** riders and 50 DHL volunteers took part in the Bike MS 2018 Breakaway event from Miami to Key Largo. As the presenting sponsor of Bike MS, DHL brought staff from South Florida, Puerto Rico, Mexico, Arizona, and Ohio, marking its 15th year participating in the event. The 175 miles traveled translated to \$50,000 in donations to finding a cure for multiple sclerosis, an autoimmune disease affecting as many as 400,000 people in the United States.

**SHOVEL READY**

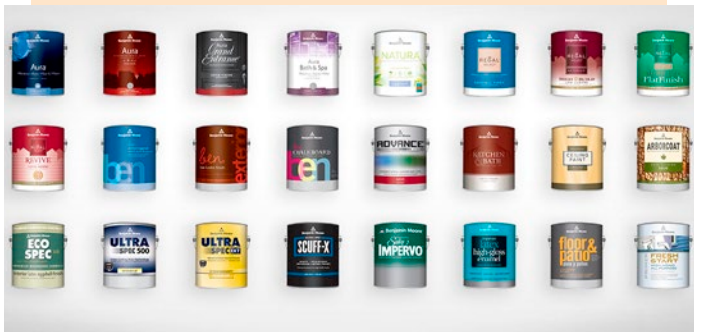
Industrial logistics developer **CT** started building the 1.34-million-square-foot, \$125-million Interchange 55 Logistics Park in suburban Chicago, with completion expected by the end of 2018. This two-building facility has access to I-55 and I-355 trucking routes and proximity to logistics and intermodal freight transportation via BNSF Logistics Park, Union Pacific Intermodal Terminal, and FedEx and UPS Chicago area consolidation hubs. The project consists of two state-of-the-art crossdock distribution facilities, each with a 32-foot minimum clear height and 560 feet of building depth.



recognition

**American Airlines Cargo** was named the **International Carrier of the Year** by the Airforwards Association, a trade group that represents U.S.-based airfreight providers. The International Carrier of the Year award recognizes American's dedication to customer service, on-time performance, reliability, and security.

▼ Paint, color, and coatings brand **Benjamin Moore & Co.** was awarded two distinctions in the fourth annual SCM World Power of Profession Awards: **Talent Payback of the Year** and **Talent Breakthrough of the Year**. SCM World, a Gartner community, recognized the company for its efforts to transform and modernize its supply chain, increase employee retention, and improve employee engagement.



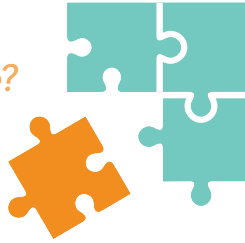
Third-party logistics provider **Atlanta Bonded Warehouse (ABW)** received Barilla America's **Warehouse Partner of the Year** for 2017. The Italian food company measures the performance of its 3PL partners on criteria such as cost, service levels, and inventory accuracy. This marks the third consecutive year ABW has won the award.

**UP THE CHAIN**

**Jack Buffington** was appointed supply chain faculty member in a joint program by the Transportation Institute and Daniels College of Business at the University of Denver. Buffington started his faculty appointment in February 2018 and spearheads the launch of a supply chain program aimed at engaging the business community. Buffington is also responsible for warehousing and brewery fulfillment for beer manufacturer MillerCoors.



Supply Chain Challenge?  
SOLVED!



# Customized TMS Delivers Annual Savings

WD-40 Company teamed up with Unyson for better network oversight and improved on-time service.

## THE CHALLENGE

WD-40 Company needed to find a solution to increase visibility to their transportation spend while simultaneously making improvements throughout their business. Additionally, they wanted to outsource their LTL, TL, IML, bulk, and drayage freight to a third-party provider. WD-40 Company's network includes 500 unique customers and four Distribution Centers (DCs).

## THE SOLUTION

Unyson designed a customized transportation management and technology solution for WD-40 Company. With this solution in place, Unyson was able to manage WD-40 Company's inbound and outbound freight. Next, Unyson created a unique dashboard for the company to provide better oversight into their network. Unyson was able to reduce WD-40 Company's transportation spend and deliver incremental savings year over year. In addition to savings, Unyson improved on time service to WD-40 Company's customers.



With the integration of Unyson's TMS into WD-40 Company's supply chain, Unyson began maximizing consolidation opportunities and advising WD-40 on appropriate carrier selection. Additionally, Unyson conducted a network sourcing analysis of WD-40 Company's four DCs and shipping patterns.

With this knowledge, Unyson identified which locations were optimal for WD-40 Company to ship from to produce the most cost savings. Unyson's dedicated account team also provides WD-40 Company with detailed monthly reporting, lead time tracking, and

MABD compliance. Detailed reporting ensures the supply chain group is maximizing trailer utilization and reducing cost per pound shipping. This all-encompassing solution has proved beneficial to both companies throughout the 11-year partnership.

 UNYSON



To learn more about Unyson's solutions, email [info@unyson.com](mailto:info@unyson.com), call 314-819-6300, or visit [www.unyson.com](http://www.unyson.com).

March 2018 • Inbound Logistics 25

# Georgia at the Center of Innovation

A Georgia senate committee has named Savannah and Augusta as locations for new logistics technology innovation and information technology corridors.

The cities were chosen following a committee report that identified incentives for technology growth, and the best locations to establish these innovation corridors.

In December 2017, the Senate Information Technology Corridors Study Committee released a report recommending that a program be developed in Savannah to focus on “logistics technology innovation” to further develop the area’s growing ports-related economy.

Other states have used technology corridors to provide funds and incentives to improve marketing of areas naturally leading their sectors, and to focus funding on corridor-related infrastructure, as well as educational and workforce development initiatives.

Savannah’s new Logistics Innovation Corridor will be established near the port facilities. The city and surrounding area could “immediately benefit substantially” from a program with a focus on logistics technology innovation, according to the committee’s recommendations.

In the Augusta area, the Georgia Cyber Innovation and Training Center, currently under construction, will house a state-owned cyber range and training facility, and provide cybersecurity awareness, training, and education to state agency information security officers.

The committee also recommended the state legislature become more involved and aware of the “constantly changing information technology industry.” They suggested an advisory committee be formed to create future grant programs, find ways to better coordinate with industry leaders, and identify opportunities and areas that could benefit.

# SUPPLY CHAINS GET SMART

MIT and JDA Software will team up to advance research on intelligent supply chains, including machine learning, optimization, and consumer behavior modeling. The collaboration leverages both parties’ business domain expertise and customer base.

Professor David Simchi-Levi of the Institute for Data, Systems, and Society has been tapped to lead the multi-year collaboration.

The MIT and JDA research teams will create real-world use cases to expand predictive demand, intelligent execution, and smart supply chain and retail planning that will yield a unique business strategy. These use cases will explore new data science algorithms that combine natural language processing, predictive behavior, and prescriptive optimization by taking into account past behaviors, and predicting and changing future behaviors.

“It is more critical than ever to infuse innovation into every aspect of the supply chain, as edge technologies such as the Internet of Things and artificial intelligence are essential to digitally transforming supply chains,” says Desikan Madhavanur, executive vice president and chief development officer at JDA.

“This collaboration allows us to tap into the extraordinary mindshare at MIT to accelerate the research into more intelligent and cognitive capabilities moving forward,” he adds.

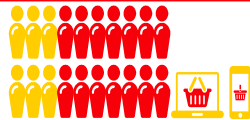
## E-Commerce Trends

SOURCE: DHL



**12.8%**

Share of global retail e-commerce of total retail spend by 2019<sup>1)</sup>



**1.7bn**

people shop online in 2017<sup>2)</sup>



**\$192 billion**

Value of global e-commerce logistics industry incl. fulfillment in 2016<sup>3)</sup>



**\$107.4 billion**

Expected online sales this upcoming holiday season<sup>4)</sup>



**\$25.3 billion**

One day sales revenue of Alibaba group on Singles’ day<sup>5)</sup>



**60%**

Share of China and USA of global e-commerce market in 2016<sup>6)</sup>



**\$3.4 trillion**

Value of domestic and cross-border e-commerce transactions worldwide by 2020<sup>6)</sup>



**74%**

of shoppers generally prefer free over fast shipping<sup>7)</sup>

1) Worldwide E-Commerce Report 2016 (eMarketer, 2016); 2) Statista; 3) Global E-commerce Logistics 2016 (Transport Intelligence, 2016); 4) Adobe Digital Insights 2017 Holiday Predictions; 5) Alibaba’s Singles’ Day Sales (Bloomberg, 2017); 6) Cross-border B2C E-commerce Market Trends (Accenture & AiiResearch, 2016); 7) State of Shipping in Commerce (Termando, 2017)

**E-commerce is an increasingly powerful engine for growth, and offers the best opportunities for small and mid-sized businesses, according to research conducted by DHL.**



## Capacity Crunch? Carriers Weigh In

Shippers express concern about finding capacity, but how do carriers see the situation? To find out, Transporeon Group, a cloud-based supply chain execution platform provider, surveyed its base of more than 3,000 North American logistics service providers.

Most carriers surveyed claim they are at capacity utilization rates of 95 percent and higher, both in the spot market and the contract market. Capacity seems to be scarce—about 68 percent of respondents say they can sell no more than 10 percent in additional capacity. Note that this capacity may not be located near demand points and could likely go unused.

More than half of the carriers surveyed report their spot rates have increased by at least 10 percent over the last quarter of 2017. Contract rates have also increased, and only about 20 percent of surveyed carriers say their rates have stayed the same.

Almost half of the carriers surveyed expect their rates to increase up to five percent in 2018, while the other half expect rate increases of greater than five percent. Only four percent of carriers expect rates to stay steady.

For that reason, carriers report almost 60 percent of their customers are planning to employ a combination of bid tactics: reduce or consolidate the number of bids throughout the year; bid out of only selected high-volume or dedicated fleet lanes; and pre-agree to price increases. About 14 percent of contract customers have already agreed on price increases without going out for a bid in 2018.

Demand for both outbound and inbound freight seems to be particularly high in the Upper Midwest, Southeast, Great Lakes and Mid-Atlantic regions, as well as Texas, according to carriers. As GDP continues to grow into 2018, there are no signs that demand will abate, especially in the Upper Midwest and Southeast regions. Driver and capacity shortages in these regions will undoubtedly result in increased prices.

While 2018 will remain a challenging market environment, shippers should resist remaining passive. A strategic, well-executed bid will add competitive advantage, especially when employing market-leading execution tools. Shippers who are not proactive in this market environment will ultimately be put under pressure to react rather than act deliberately.

## Consumer Confidence Builds Up Industrial Real Estate

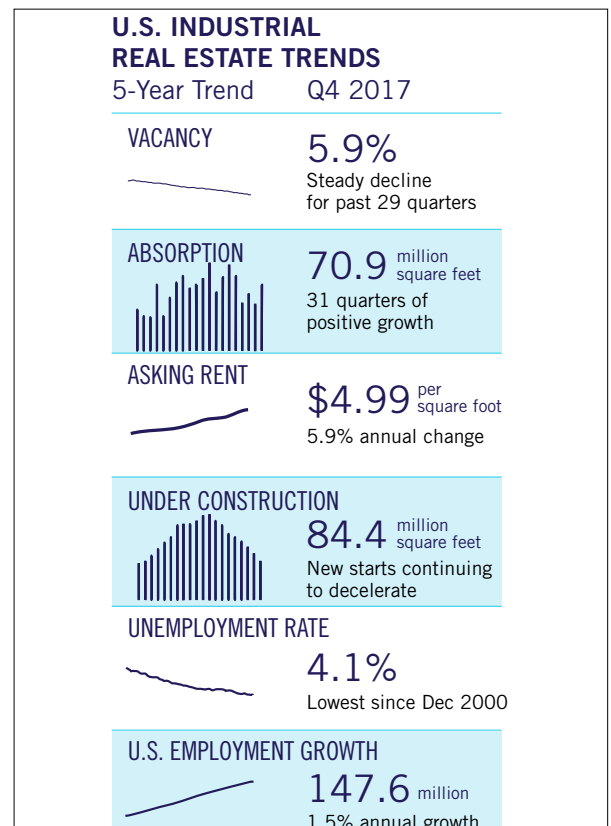
2017 was another banner year for the industrial real estate market, in large part due to consumer confidence, which hit a 17-year high in December, according to Transwestern's year-end national industrial report. The U.S. market witnessed its eighth consecutive year of growth in 2017, marking 31 consecutive quarters of positive absorption and 29 consecutive quarters of declining vacancy.

Ports set records for container volumes as e-commerce grew to 9.1 percent of retail sales by the end of 2017, up from 8.2 percent the prior year. Three of the largest transactions completed in the fourth quarter were in the nation's leading port markets: In the Inland Empire, Walmart and Solaris Paper took one million square feet and 862,000 square feet, respectively, and Best Buy signed for 725,000 square feet in New Jersey.

"What is remarkable about the current 5.9-percent vacancy rate is that it has been cut in half since the fourth quarter of 2010, despite 873 million square feet of new development during the same period," says Matthew Dolly, research director for Transwestern. "Nationally, we've experienced four consecutive years of at least 200 million square feet of positive absorption."

New starts continue to decelerate, however, with only 84.4 million square feet under construction, the lowest level since Q2 2013, the report reveals. This could lead to a plateau in vacancy for the coming quarters.

"In the current environment, especially in markets that are facing a scarcity of developable land, companies are turning their attention to redevelopment and renovation," Dolly says.



# New Jersey, Rhode Island: Highways to Hell



The nation’s top-performing, most cost-effective highways can be found in North Dakota, Kansas, South Dakota, Nebraska, and South Carolina, according to the latest edition of the Reason Foundation Annual Highway Report.

Reason Foundation’s Annual Highway Report ranks the performance of state highway systems in 11 categories, including pavement condition, deficient bridges, traffic congestion, fatality rates, spending per mile of state-controlled highway, and system administrative costs.

The significant differences between state highway systems are illustrated by the huge disparity in the spending per mile figures. West Virginia spent the least—\$35,047 per mile of state-controlled highway, while New Jersey spent the most—\$2,069,020 per mile of state-controlled highway.

Overall, New Jersey ranked last, 50th, in the nation in performance and cost-effectiveness due in part to having the nation’s worst urban traffic congestion while also spending the most money per mile. Rhode Island, Alaska, Hawaii, and Connecticut joined New Jersey in the bottom five of the overall rankings.

In some of the individual categories, Wyoming’s highways had the least traffic congestion, while drivers in New Jersey and California experienced the worst traffic jams. Alaska had the bumpiest urban interstate pavement condition, and Delaware had the smoothest.

### Top 5 States with Best Highways

1. North Dakota
2. Kansas
3. South Dakota
4. Nebraska
5. South Carolina

### Bottom 5 States with Worst Highways

46. Connecticut
47. Hawaii
48. Alaska
49. Rhode Island
50. New Jersey

## LOGISTICS JOBS: FOLLOW THE MONEY

The rise of e-commerce, coupled with manufacturing and logistics facilities implementing robotics and other emerging technologies in the production process, has caused demand for digitally savvy workers with trade skills to skyrocket.

But with a projected manufacturing and logistics (M&L) talent shortage of two million jobs, employers must pay competitively, beyond the market salary rate, to attract and retain qualified, dependable workers.

According to Randstad US’s recently released *Manufacturing & Logistics 2018 Salary Guide*, here are the four most in-demand M&L positions and their high-range salaries (for the Dallas-Fort Worth area in Texas):

- **Production Managers (\$64.36/hour):** Candidates with experience and expertise in production and quality are in high demand as this position is responsible for daily efficiency of production output, managing schedules/safety of line workers, and ensuring quality of goods.
- **Warehouse Managers (\$41.44/hour):** Candidates who specialize in workplace safety (training/evaluations, maintaining records, and ensuring employees follow policies and safety standards) will be in demand as employers prioritize safety.
- **Maintenance Mechanics (\$27.81/hour):** Keeping sophisticated machinery fully functional will drive demand for candidates.
- **Machine Operators (\$21.20/hour):** As facilities adopt new technologies such as robotics, these workers are critical for set-up, operation, and maintenance of machines/equipment.





## High School Meets Truck Driver Challenge Hands-On

A Patterson, California, high school has an answer to the commercial truck driver shortage: kick young students' interest into high gear.

Its recently launched truck driving school program puts high school students behind the wheel. In addition to classroom instruction, they receive hands-on experience on a truck as well as training on truck simulators, where they learn how to shift a 10-speed transmission.

"The reaction from the students taking this class has been powerful," says Dave Dein, truck driving program coordinator and instructor at Patterson High School. "This class provides a platform for students to experience success. Several of the students who took the class this year came in with low self-esteem and confidence. These are students who did not do well in the traditional classes, but now they are learning about something they care about and have transformed themselves."

In 2016, Dein, a fourth-grade teacher, had approached Superintendent Dr. Philip Alfano with the idea of starting a truck driving school, one of the first high school truck driving programs in the United States. Before becoming a teacher, Dein was a driver for a large manufacturing company, logging more than 700,000 accident- and ticket-free miles.

After getting the green light from Dr. Alfano, Dein enlisted district Career Technical Education Director Jeff Rowe, who leveraged funding for the program. They brought in industry partners and created an advisory board, which included Morning Star Trucking, Penske Logistics, Foster Farms, and Northern Refrigerated, to help develop the program.

They based the program on the most stringent industry-level standards set by the Professional Truck Driver Institute as well as the Federal Motor Carrier Safety Administration Entry Level Driver Training Standards that go into effect in 2020.

Though the program is still new, it has clearly made inroads.

"I had one parent come to me and with tears in his eyes thanked me for saving his son," says Dein. "He shared he was so worried that his son was going down the wrong path in life, but since taking this class he is now focused on graduating high school and excited about his future in the transportation industry."

## In It for the Long Haul

This first of its kind Heavy Haul Freight Carrier Survey of 258 heavy haul truckers, co-sponsored by FR8Star and Comdata, yields some interesting trends:

- Nine out of 10 truckers say they are tech savvy, suggesting the myth of the anti-tech trucker is just that—a myth.
- Of the almost one-quarter (22 percent) of truckers who have worked with freight marketplaces, more than three-quarters (77 percent) claim it was a better experience than when using a traditional broker, and three in five truckers (61 percent) say they made more money when compared to traditional brokers.

When asked what single factor would have the biggest impact on their business, top responses include:

1. Receiving a higher rate per mile.
2. Getting paid faster.
3. Better information about trips and/or loads.
4. Spending less time finding the next load.

## Retail Relief

"Consumer confidence rose further in February 2018 to 130.8, its highest level since November 2000, after an increase in January. Strength in the labor market and the recent tax cuts propelled consumers to remain positive, despite the recent volatility of the financial markets. This bodes well for retailers as most consumers found extra discretionary income in their paychecks. The recent market volatility would only potentially impact the luxury sector as those consumers have more income tied up in the markets—there would need to be sustained periods of negative news coming from the markets to impact most retail sectors."

—Naveen Jaggi, *President of Retail and Capital Markets, JLL*



## Coping With Trade Compliance Challenges

**THE THOMSON REUTERS-KPMG** International Third Annual Global Trade Report reveals leading practices from top global trade practitioners in the following areas:

### 1 Centralization

Centralizing the governance of global trade is a good starting point, report many large and experienced multinationals. They find that once one area is centralized, companies tend to centralize more trade processes than they initially thought they could.

### 2 Classification

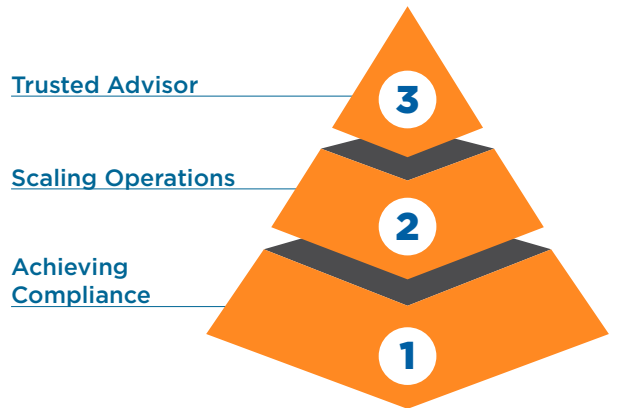
Product classification is a common challenge among respondents to the 2016 Global Trade Report. To manage that challenge, multinationals are beginning to use shared services centers or centers of excellence to support the classification process.

### 3 Free trade agreements

While a minority of respondents to the 2016 Global Trade Report say their company uses all applicable free trade agreements (FTAs), the largest multinationals demonstrate sophisticated use of FTAs and C-suite visibility into FTAs. They also handle compliance at the local or regional level. "These insights highlight the importance of implementing customized global trade technology and processes that meet a company's individual needs," notes Doug Zuvich, partner and global practice leader, Trade and Customs, KPMG in the United States. "By implementing the right solutions, trade professionals can increase efficiency and accuracy while delivering real value to their organizations."

## THE GLOBAL TRADE PYRAMID OF VALUE

The ideal trade function for large, global companies is a pyramid-shaped hierarchy of needs: achieving compliance, scaling operations, and becoming a trusted advisor.

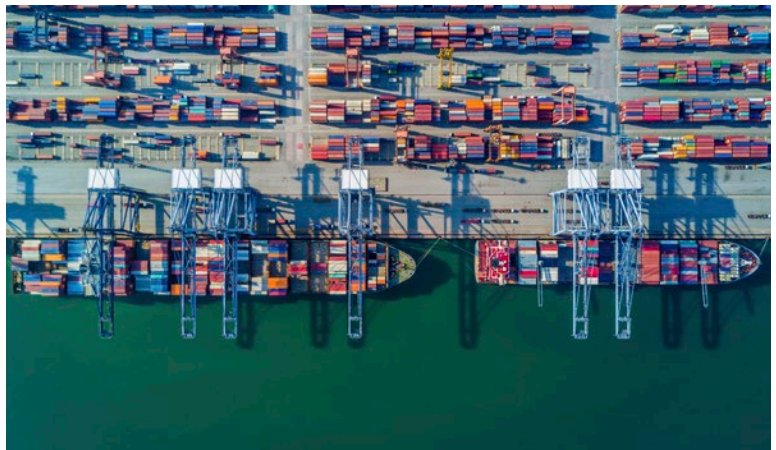


SOURCE: Thomson Reuters-KPMG International Third Annual Global Trade Report

## Imports, E-Commerce Drive Industrial Real Estate Demand

**SEAPORTS ARE A VITAL** economic engine for the United States and a huge driver of demand for industrial real estate. Imports represented 63 percent of the total loaded cargo volume in 2017 for the top 13 ports in the United States. As imports continue to rise steadily in many ports across the country, and e-commerce experiences explosive growth, the appetite for nearby industrial space—warehouses, distribution centers, and fulfillment centers—has been hearty. According to Cushman & Wakefield's *U.S. Ports Update YE2017*:

- The U.S. industrial market has now recorded more than 240 million square feet of absorption for four consecutive years—the strongest run on record.
- The warehouse market remains tight with vacancy tracking at 5.2 percent in Q4 2017. Over the past year, logistics-related vacancy has declined 50 basis points (from 5.7 percent to 5.2 percent) despite the delivery of 168.6 million square feet of new speculative warehouse product.
- These banner numbers do not occur without healthy port markets, which accounted for 28 percent of the net absorption registered in 2017 and vacancy rate of just 3.5 percent.







## German Trucks: It's a Steal

**GROWING CARGO THEFTS ACROSS** Germany, resulting in product losses valued at \$1.3 billion annually, have prompted business associations in the country to launch a joint initiative to tackle the problem.

Physical cargo carried onboard almost 26,000 trucks is stolen in Germany every year, averaging a new attack on a truck every 20 minutes, according to joint calculations of several business associations, led by the Transported Asset Protection Association (TAPA).

In addition to the value of the goods, the group says further damages are caused by penalties for delivery delays, the cost of replacing stolen products, and repairing damage to vehicles targeted by cargo thieves.

One of the biggest challenges identified in the report is the low level of reporting and recording of cargo thefts in Germany, which follows a similar trend seen across Europe. So is the fact that many incidents of thefts from vehicles in Germany involve trucks that are registered and insured in other European countries.

Understanding the true causes and impact of cargo crime in Germany is also further complicated by the fact that German law enforcement agencies do not keep their own cargo crime statistics.

With the launch of their new Theft Prevention in Freight Transport and Logistics Working Group, the associations are calling on law enforcement agencies in Germany for greater support and action.

"We are urging the authorities to provide more support through increased search pressure on internationally active criminal organizations," says a statement by the Working Group. "The police authorities also need to be more present at highway service stations, and specialist police units and law enforcement agencies should help to streamline transnational law enforcement. In order to take targeted preventive and repressive measures, the investigating authorities must improve recording of cargo theft offenses and create the conditions for nationwide uniform reporting of cargo crime. Lack of staff, poor networking, and low specialization only serve to delay investigations. This situation has to be addressed as quickly as possible."

## Small Businesses Face Import Overhead

Freightos research sheds light on rampant inefficiencies within the global freight sector, trends impacting the growing import/export industry in the United States. While importing continues to grow across both small and enterprise companies, almost 50 percent of the 300,000+ American businesses that import still use spreadsheets to manage their international supply chain. Global trade is worth trillions, and U.S. Department of Commerce data reports a 6.7-percent year-on-year increase in U.S. imports in 2017—the fastest rate of growth in more than seven years; yet the industry remains siloed and outmoded.

Freightos conducted a survey to reveal how cumbersome logistics remains to American companies importing goods.

Key findings:

- 42.4 percent of business owners spend more than 2 hours (or an estimated \$100 of labor) on managing each individual shipment.
- 10 percent of small business owners reported more than 75 percent of shipments arrive late.
- Only 11.7 percent of large importers feel their freight providers are technologically advanced.
- Of companies that import only four to 10 shipments yearly, almost half still spend more than \$10,000 per month on international freight.

"Ask any freight forwarder or business owner, and they'll agree—international freight, particularly for small and midsize businesses, is long overdue for an upgrade," says Dr. Zvi Schreiber, Freightos CEO and founder. "These survey results put real data to the all-too-frustrating obsolescence of the technology used to manage international shipments, and provide valuable insight into the motives behind the rapid growth in logistics technology investments."

## LEVELING THE OCEAN SHIPPING PLAYING FIELD

Participating beneficial cargo owners (BCOs) can benefit from enhanced purchasing power, service monitoring, and cost transparency as a result of a new partnership between supply chain consulting company Chainalytics and global shipping consultancy Drewry.

The companies have joined forces to launch an innovative ocean freight procurement solution for shippers. The Chainalytics Ocean Buying Group will provide an ocean freight procurement platform that levels the playing field by enabling small and midsize importers and exporters collaboratively achieve "big shipper" rates and terms direct with ocean carriers and benefit from shared intelligence for better commercial decisions.

"By combining propositions we're able to offer a unique service delivering much-needed improved ocean carrier contractual terms with full transparency, cost stability and predictability, market intelligence, and technology-driven category management to a segment of the market that often suffers pricing volatility and opaque service levels," says Philip Damas, head of Drewry's logistics practice.

# Good Start for Air Cargo? Too Early to Tell

**2018 LOOKS TO BE OFF** to a flying start for the air cargo industry, according to World ACD, but it may be too early to celebrate. Worldwide air cargo yield dropped to USD \$1.89 (U.S. dollars) in January 2018, 7.8 percent below December, but 16.8 percent higher than January 2017.

Virtually all airlines posted revenue growth, more than one-third of all reporting airlines achieved volume increases between 10 and 50 percent, and worldwide volume was up by 8.5 percent—with Europe and Latin America up by more than 11 percent.

Yet, it is too early to qualify this year’s start, warns the research company. While worldwide USD yield rose by 16.8 percent year over year in January 2018, helped considerably by a devaluing U.S. dollar, the year-over-year yield increase was a mere 1.6 percent in Europe.

Volume trends, however, are difficult to interpret, as Chinese New Year (CNY)—a sizeable influence on overall trade—fell on Jan. 28 in 2017 and on Feb. 16 in 2018. CNY normally has two effects on trade: a spike in trade before, and trade diminishing after. Although the negative influence is usually felt during the two weeks following CNY, the first four days (Jan 28–31 in 2017) bear the brunt of the decrease.

Thus, with world GDP growth continuing, you might expect January to be much better in 2018 than in 2017. But by how much? Based on freight tonne kilometers for the first three weeks of January, World ACD predicts year-over-year volume growth in this “pre-CNY period” may well have been in the four- to six-percent range. Serious growth, yes, but it hints at an overall growth pace lower than the increase shown in the full January figures. February data will better reveal the true start of 2018.



## World ACD 2017 Air Cargo Trends

- Average worldwide yield for special cargo (excluding perishables) was 45 percent higher than for general cargo; one year earlier, the difference was 50 percent.
- General cargo grew with 11 percent vs. 7 percent growth for other cargo categories; the figures for 2016 were 3 percent and 5 percent respectively.
- High tech, flowers, and pharma showed the highest absolute growth of all special cargo. Biggest contributors to the growth in these categories were DB Schenker, Cargomaster, and Kuehne + Nagel.



PHOTO: Port of Long Beach

## Long Beach Port Goes With the Flow

As cargo volumes and the complexity of port operations continue to increase, the Port of Long Beach and GE Transportation are collaborating on a pilot project to improve cargo flow, increase visibility, and enhance real-time decision-making.

After a successful pilot with the Port of Los Angeles that increased visibility of incoming cargo from two days to two weeks, GE Transportation, a division of the General Electric Company, will implement its *Port Optimizer* solution at two Long Beach marine terminals for a two- to three-month pilot.

“We experienced record volumes last year,” says Mario Cordero, executive director, Port of Long Beach. “This partnership with GE is providing an important trial for us as cargo and competition grow.

We need new and innovative ways to ensure our customers can

move their containers from water to land quickly, reliably, and at a cost that makes sense for their business.”

*Port Optimizer* is cloud-based software that enhances supply chain performance and predictability by delivering real-time data-driven insights through a single portal to stakeholders across the supply chain. Integrating data from across the port, combining machine learning and deep domain expertise, it helps the supply chain monitor and respond to dynamic conditions, align people and resources, and proactively communicate across functions—enabling maximum port cargo flow and delivery performance.



## U.S. Manufacturers Brace for Tariff Backlash

**SHORTLY AFTER THE TRUMP ADMINISTRATION** announced the United States would impose tariffs on imported steel and aluminum, Harley-Davidson was among the companies expressing concern. The U.S. motorcycle manufacturer stated it would suffer a severe impact on sales if other countries countered by imposing a punitive or retaliatory tariff on its bikes.

If President Trump follows through on a plan to impose a 10-percent tax on imported steel and aluminum, European Commission President Jean-Claude Juncker threatened to impose tariffs on Harley-Davidson motorcycles.

The Trump administration is positioning the tariffs as a way to protect American jobs, but many economists, auto companies, the oil industry, and even fellow Republicans have criticized the plan.

In an open letter to President Trump, Heidi Brock, president and CEO of the Aluminum Association—which represents more than 100 aluminum producers, including Alcoa and Rio Tinto Alcan, that employ 700,000 U.S. workers—echoed the criticism.

“We fear that the proposed tariff may do more harm than good,” Brock states. “Unfortunately, the tariffs proposed will do little to address the fundamental problem of massive aluminum overcapacity in China, while impacting supply chains with vital trading partners who play by the rules.”

## FTAs TOP CONCERN OF IMPORTERS/EXPORTERS

To gauge shipper perspectives on trade in today’s world, and particularly about the shift in free trade agreement (FTA) focus, global logistics and transportation solutions company BDP polled U.S. importers and exporters attending its 29th Annual Regulatory Compliance Seminar in Houston in late February.

The results confirms that FTAs remain in the forefront of the trading community’s concerns. Among the findings:

- 73 percent of respondents say the North American Free Trade Agreement (NAFTA) is antiquated and should be updated; however, 10 percent say NAFTA does not need to be changed at all.
- 67 percent say withdrawing from the Trans-Pacific Partnership (TPP) was the wrong thing to do and that the United States will be left behind. Of the remaining respondents, 13 percent say withdrawal is positive, while 20 percent are unsure.
- The audience did not have strong feelings about the U.S.-Korea Free Trade Agreement (KORUS FTA), with 36 percent wanting it left as is and 36 percent undecided. Additionally, 21 percent want KORUS FTA to be updated and 7 percent say it should be canceled altogether.

BDP also asked seminar attendees which FTA would be the most beneficial for their organization: India, UK, Vietnam, Japan or Philippines. All five FTAs are equally important, according to 49 percent of respondents.

However, opinions were more divided over FTA benefits, with 56 percent believing they keep U.S. manufacturing costs down; 26 percent do not share that opinion, and 18 percent are undecided.

In dealing with current U.S. trade positions, 43 percent say they are maintaining the status quo and 30 percent are actively seeking to give input to the U.S. government. Another 27 percent are actively investigating sourcing choices in their supply chain to avoid certain countries they feel might be problematic going forward.

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**Bill Keough**  
Managing Director,  
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*Companies concerned with cost control, competitive differentiation, and innovation are more than ever seeking professionals who can drive substantive change.*

**T**he field of supply chain management and logistics offers some of the most exciting career opportunities in the marketplace today. Companies concerned with cost control, competitive differentiation, and innovation are more than ever seeking professionals who can drive substantive change to help them achieve these objectives.

However, many young and mid-career professionals, especially in large firms, have held roles only in very specific supply chain functions. Most of these individuals aspire to assume executive roles in supply chain and logistics, but many have spent much of their career in only one or two areas of the supply chain function. Perhaps you have spent the last 5 years of your career in procurement, or in the transportation group specifically focused on LTL. Executives who are responsible for overall supply chain performance invariably have a far broader skill set. These executives must understand not just procurement, but the impact procurement has on inventory, transportation, production, and all the other facets of the corporate supply chain. They understand the financial implications and the risks of new supply chain initiatives. They understand best practices in developing a network of facilities, and the IT infrastructure required to support best-in-class supply chain and logistics practices. They understand supplier management, and how to build, measure and incentivize great teams. In short, successful executives understand the end-to-end supply chain, and how changes in one function may impact the others.

The Supply Chain Transportation Master's Program (SCTL) at the University of Washington is designed to give students the skills and experience required to realize their career ambitions. This online program was designed to be work-compatible; most of the students in the program are busy supply chain and logistics professionals with families, and many of them travel the globe for their jobs. But the program is different from other online programs. It features live online classes where you collaborate with your professors and other students in real-time over the Internet. The program also offers the opportunity to make real connections.

The SCTL Program begins with an in-person, week-long Residency at the University of Washington in Seattle, where students tour facilities like Amazon's fulfillment center just south of Seattle, take a boat tour of the Seattle port, and attend a cocktail reception with the program's board of advisors – VP-level executives at firms like Starbucks, Boeing, and Costco. But the primary purpose of the Residency is to enable students to meet the other members of their cohort – the students they will be working with closely over the next two years of the program. Students also meet the SCTL faculty – experienced UW professors as well as supply chain and logistics practitioners with years of experience in consulting, information technology, mergers & acquisitions, and the design of complex transportation networks. The faculty brings a wealth of real-life experience to prepare students to address the complex supply chain challenges they will encounter as they advance in their careers. Program graduates have assumed leadership roles in firms like Amazon, Microsoft, Boeing and many others. Students leverage the advice and deep networks of senior professionals through a mentoring program and more informal collaboration with the program's advisory board and faculty, and program alumni.

Acquiring new skills and advancing your career in the rapidly-changing fields of supply chain, transportation, and logistics is both challenging and exciting. Perhaps an innovative online program is just the solution you're looking for.



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# Shipment Visibility Gets a Digital Facelift



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**Q:** *Why is digital technology important to shipment visibility?*

**A:** Asking why digital technology is important to shipment visibility is similar to asking why you need fuel to operate a car. Without collecting data through the many technology channels, shipment visibility is reduced to phone calls, manual web searches, and Excel spreadsheets.

This may be a viable option for companies with a very low number of shipments, but for companies managing thousands of international shipments a month across many trade lanes and trading partners, digital technology is the enabler and fundamental starting point for shipment visibility.

In the past, companies had to rely on carrier EDI or web forms, but today's emerging digital technologies are enabling companies to gather critical intelligence on the global supply chain. With a digital model of the global supply chain, companies can realize collaboration, automation, analytics and flexibility. The result is a transformed global supply chain with improved margins, greater agility, and reduced risk.

**Q:** *How reliant on carrier data integration does this become?*

**A:** Only six percent of 623 supply chain professionals across 17 countries think they have achieved supply chain visibility, according to a survey by GEODIS. Importantly, 70 percent of respondents described their supply chains these days as either

very or extremely complex. To manage this complexity, companies need to maintain a control tower over their global supply chains, enabling action, visibility, and insight to cross-border business.

Shipment visibility can be achieved through a variety of channels—often through carrier integrations or freight forwarders, but also through brokers, 4PLs, suppliers, transloaders, and IoT sources. Through new digital technologies, data quality is improved and more accurate than the old EDI messages. With this data, supply chain managers can interpret, consolidate, predict, and automate to solve the more complex and critical issues.

**Q:** *Is blockchain the panacea for shipment tracking?*

**A:** The industry is awaiting the proof-of-concept to learn how much value can be derived from a blockchain technology solution for shipment tracking, but the potential is already evident. As the industry learns more about the implications of blockchain, reduced risk, greater cost savings, and improved supply chain transparency will continue to be the value-add differentiators that digital technology delivers.

In fact, a number of companies are already using blockchain to enhance transactional integrity, augment financial auditing, and improve operational effectiveness. One high-profile proof of concept is the partnership between Maersk Lines and IBM to bring efficiencies to all facets of the ocean container shipping business. Stay tuned for more as this transpires.

# Advantages of a Niche Third-Party Logistics Provider

Third-party logistics (3PL) providers provide detailed logistical solutions for companies, in an array of industries, in need of contract warehousing, personalized fulfillment, and/or freight management. Often, these providers will specialize and target a specific industry or geographical market, or will limit their service offering. Those who specialize are referred to as niche 3PLs.

**Q:** *What makes a third-party logistics provider niche?*

**A:** Those who enter into any type of niche business tend to specialize and become very good at what they do; the same goes for 3PLs. Niche 3PLs specialize as it relates to a variety of different factors. Many focus on the service offerings they excel in; some find the geographical location that best services their customers, but the majority focus on the specific industry verticals their business processes allow them to effectively operate within. Providers who specialize recognize the value in building solutions around higher value, higher care, and a higher touch service for the commodities they handle.

**Q:** *What are some of the advantages to using a niche 3PL over a traditional provider?*

**A:** Niche providers typically utilize and offer:

- **Existing Systems & Processes:** Niche providers have a specific customer they attract based on a defined set of parameters. These parameters allow them to offer a highly specialized

set of solutions due to previously developed systems and processes. The existence of these systems allows the provider to utilize them within their entire customer network, streamlining procedures at the warehouse level.

- **Single Talent Pool:** A niche provider typically relies on a highly trained labor pool to carry out all services for their customers. This provides the peace of mind of knowing the 3PL's team has extensive experience carrying out solutions for like-minded product.
- **Tailored Solutions:** Providers who specialize typically have the ability to create and implement solutions that are specifically tailored to your business. They have the personnel in place to dedicate people to not only develop solutions for your business, but also make sure the processes are in place to efficiently accomplish the task at hand.
- **Responsiveness:** Existing processes and an experienced team allow a 3PL to remain nimble and responsive to both market demands and evolving customer requirements. As the logistics industry evolves and changes, so too do the industries in which 3PLs specialize. By being 'experts' within set verticals, they can easily incorporate new services their customers' product requires.



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## LEAN SUPPLY CHAIN

BY PAUL A. MYERSON

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# Internet of Things to Come

**T**he Internet of Things (IoT) allows users to collect and make data visible at key points, improving customer satisfaction and optimizing supply chain responsiveness. It can also offer greater differentiation and innovation, leading to a competitive advantage.

IoT is widely discussed, but what does it refer to and how does it relate to the lean supply chain? Simply put, IoT is the interconnection—via the internet—of computing devices embedded in everyday objects, enabling them to send and receive data. By 2020, there will be more than 26 billion of these connected devices, according to Gartner.

### Searching for Increased Visibility

There are a variety of applications for IoT in the supply chain to help gain better visibility and control including:

- Sensors
- Communication devices
- Servers
- Analytics engines
- Decision-making aids

The areas of focus with the most potential in the supply chain are visibility, replenishment, and maintenance. Specific examples include the following:

■ **Asset tracking.** RFID and GPS sensors can track products in manufacturing, distribution, and retail facilities.

■ **Supplier relationships.** IoT enables better communication with vendors, which helps improve quality and performance.

■ **Inventory accuracy and replenishment forecasting.** Through the use of IoT, you can substitute (and communicate) more timely and accurate information for the excess inventory you hold just in case. It also allows more automated timely replenishment through machine-to-machine communications.

■ **Fleet management and maintenance.** Applying IoT to planning, routing, and tracking containers and vehicles gets product to the customer faster. Installing sensors on plant and warehouse equipment and on vehicles improves performance and scheduled maintenance.

The supply chain has many moving and somewhat disconnected parts. Therefore, the successful application of IoT in your supply chain may not be as simple as it might sound. Improvements in sensors, communications, and cloud computing have made IoT adoption more realistic in recent years.

### Facilitating and Enabling A Lean Supply Chain

To link the physical and digital in a more universal way requires the further development of standards, common architectures, and interfaces to integrate the information into current systems.

Of course, as always, technology can only enable a lean supply chain. So it is important to first make sure that your existing supply chain is integrated and efficient internally, and at least to some degree externally.

Then you need to develop a strategy for where and how to leverage specific IoT technology—and how you will analyze all that data—as all companies are dealing with limited resources.

By starting down the IoT road now you will have a better chance of giving your company a competitive advantage in the long term. ■



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## [ 3PL LINE ]

BY BILL GOODGION

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# Trouble Finding Capacity? How a 3PL Can Help

**M**ore regulations, fewer driver hours, and even fewer new drivers entering an already understaffed industry all add up to a perfect storm. The ripple effect of what analysts have been predicting is starting to hit home for people who probably never gave a second thought to what a truck capacity shortage could mean to their business, let alone everyday life.

Every industry—from food to manufacturing, banking and finance, healthcare, retail, and beyond—relies on trucking to keep goods flowing on time, without damages, and within a realistic budget.

While there is no silver bullet solution to solve all the issues a trucking shortage creates, one way to take pressure off some of the pain points is to leverage a partnership with a third-party logistics (3PL) provider.

Here's how a 3PL can help you manage the trucking shortage:

■ **Access to a large network of carriers.** 3PLs have robust carrier administrative processes, load matching services, and back-office support teams that allow them to properly vet more carriers quickly and effectively.

■ **Provide optimization.** 3PLs have either built their own or invested in a Transportation Management System (TMS). A TMS helps the 3PL analyze

shipping patterns and provide recommendations for improvement. A 3PL will load all mode, transit, and rate options available to ensure your shipments move efficiently and cost effectively.

■ **Help control costs.** 3PLs have access to a mix of carriers on long-term rate agreements; they also actively purchase freight in the spot market. By having access to a larger number of carriers, 3PLs understand the rates the market can support.

■ **Offer a larger volume of business.** Higher freight volumes give 3PLs greater leverage with carriers, which means they can find backhauls, resulting in lower costs for shippers.

■ **Investment in technology and tools.** Some tools 3PLs have that help shippers make optimal transportation decisions include TMS with carrier integration for rate confirmation, load tendering, and track and trace. 3PLs also have access to several load boards

or freight marketplaces. These freight matching services help connect carriers and shippers.

Beyond alleviating some of the immediate woes related to the truck capacity shortage, working with a 3PL can drive other key benefits including lower costs to manage loads as a result of their systems capabilities and back-office processes.

3PLs can tender loads, track and trace, and process freight bills efficiently. They can also create customized reports and provide business intelligence tools. Larger 3PLs can provide international freight forwarding and warehousing and distribution solutions.

### Solution for the Long Haul

The truck capacity shortage shows no sign of being short-lived. A strong U.S. economy is driving larger than normal freight volumes and increased manufacturing is resulting in increased shipping needs. This new reality, combined with the ramifications of the ELD ruling, which are only just starting to be felt, foreshadows even more challenges on the road ahead.

Partnering with a 3PL could be the best solution to improve your supply chain visibility and reduce costs over the long haul. ■



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## [ IT MATTERS ]

BY JEFF METERSKY

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# 5 Reasons to Make Demand Modeling Part of Your Supply Chain Design Process

**P**redicting customer demand is incredibly difficult. Economic indicators, weather, seasonal influences, and industry trends constantly change and need to be continually factored in to your analysis. This insight helps improve the design of your supply chain to better account for changes in demand.

In today's marketplace, it's crucial to understand your customers' buying behavior, as well as have the ability to quantify what factors impact their buying habits. An inability to do so forces myopic supply chain decision making, which puts your supply chain at risk.

Decision makers consider demand a key input in supply chain design and sales and operations planning activities. Many organizations, however, lack confidence in their demand data. Other individuals feel they don't have the analytical background to correctly interpret this data.

### Making Predictions

To solve this problem, demand modeling technology has emerged as a critical capability for businesses that want a visually interactive way to have more confidence in, and a better understanding of, their predictions—predictions that can help them make better informed decisions and establish more effective supply chains.

Here are five reasons why you should consider demand modeling as a key component in your supply chain design process.

**1. Demand is a key driver of your future supply chain design.** One important factor that impacts your supply chain is the level, location, and timing of demand. Make sure your business has a solid grasp on future demand to ensure sufficient capacities are in place and products are deployed appropriately.

**2. Demand modeling allows you to explore alternative theories of what makes it happen.** Testing for alternative cause and effect theories and scenarios is critical when modeling a supply chain. The ability to try different demand scenarios and determine appropriate designs, policies, and responses enables you to prepare for potential issues that may crop up along the way.

**3. This approach enables accurate scenarios and sensitivities.** A deeper understanding of demand provides higher confidence in design

recommendations, rather than hedging your bets on estimates. This allows you to better quantify changing trends and detect the specific stages of the product lifecycle at any point.

**4. Support a repeatable process to capture changes with demand modeling.**

Factors that influence demand are dynamic. Having a repeatable process enables better supply chain design and makes it easier to recalculate scenarios as variables change. Because it's repeatable, you don't have to start from scratch for adjustments.

**5. This solution eases many typical demand challenges.** Barriers such as demand complexity, inability to quantify demand influencers, and lack of understanding of key demand characteristics often constrain accurate and effective supply chain designs. By factoring in demand throughout the process you can be more certain of your predictions and act with confidence if demand changes.

Ultimately, having a better understanding of customer demand can mean making more confident decisions. Factoring demand modeling into the design process makes supply chains more robust, flexible, and dynamic. This makes it easier to adjust quickly if there is a change in demand driven by underlying factors. ■



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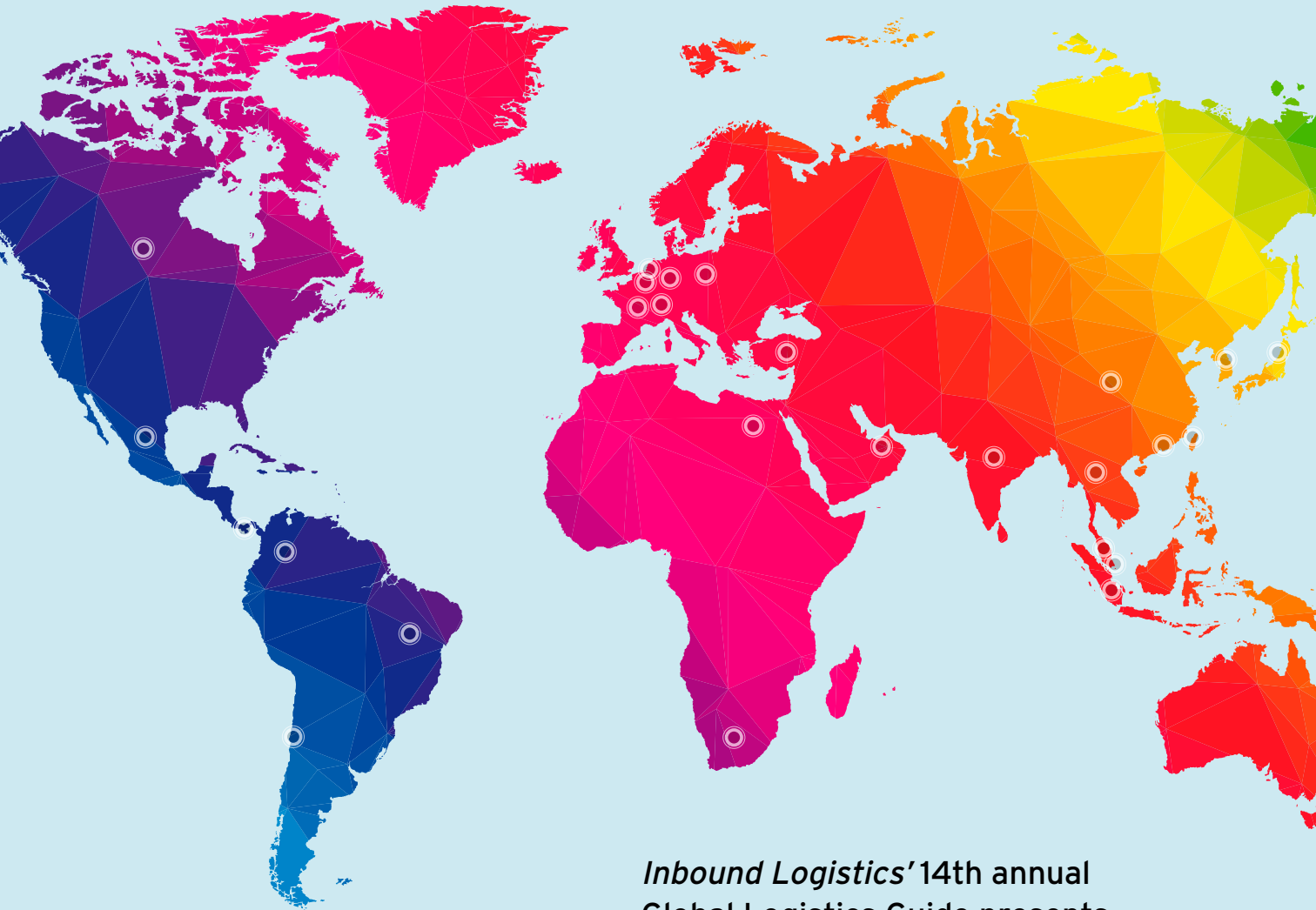
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# 2018

## Global Logistics Guide




*Inbound Logistics'* 14th annual Global Logistics Guide presents a transportation and logistics world atlas to help you stay on top of shifting global dynamics and identify and map out continents and countries that require further exploration.

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This year marks *Inbound Logistics'* 14th-annual Global Logistics Guide, a spin around the world to evaluate supply chain and logistics hotspots based on structural, economic, political, and social criteria.

That the Global Guide has evolved beyond bridge-and-mortar analysis of transportation and logistics infrastructure is testament to the changing environment companies trade in. Technology makes the world a much smaller place. In fact, IT network readiness has become an important consideration as globe-trotting businesses evaluate new logistics locations.

Still, as communication barriers fall, new ones emerge. Politics and policies, protectionism, social unrest, and consumer demand for transparency and expediency shade new perils as shippers consider different reckonings. When eying markets to sell into, locations to source from, hubs to distribute through, and tech centers to innovate with, manufacturers, retailers, and third-party providers need to consider site selection with far greater prudence.

Supply chains are becoming more demand-centric, which impacts how businesses go to market. Decentralization has long been a popular strategy for companies keen on manufacturing products for local consumption – thereby reducing lead times, increasing speed to market, shrinking transport costs, and eliminating carbon emissions. Other shippers are looking at postponement strategies that push value-added manufacturing and assembly farther downstream. Follow the future demand curve and you'll find progressive governments that are investing in transportation and IT infrastructure to attract the next wave of growth.

To help you suss out these dynamics and align your compass with new sites of interest, the Global Logistics Guide offers country-by-country snapshots with need-to-know information. *IL* identifies leading supply chain and logistics hotspots as possessing three key success factors:

1. **Transportation Infrastructure.** The density and breadth of modern airport, port, and road infrastructure.
2. **IT Competency.** The progressiveness of information and communication technology investment and development as measured by The World Economic Forum's Networked Readiness Index.
3. **Business Culture.** The strength and expertise of homegrown logistics talent, cultural and language similarities, government leadership, historical U.S. foreign direct investment outflows, and economic freedom. This index considers variables that might appeal to U.S. businesses, as well as pro-business sensibilities ranging from investment trends to future economic potential.

There are intangibles at play as well. Our X-Factor qualifier considers other determinants such as political stability, labor markets, and foreign investment policy that may shade a country's appeal one way or the other.

If you have questions or comments about our methodology and selections, please email: [editor@inboundlogistics.com](mailto:editor@inboundlogistics.com)

#### ABOUT THE RANKINGS

Countries are ranked on three criteria: **transportation infrastructure** (T: 1-4 points), **IT competency** (I: 1-3 points), and **business culture** (B: 1-3 points). Points are totaled for all categories – taking into consideration X-Factor (X: plus or minus) points – to determine final ranking: 10 is highest, 3 is lowest.

Sources: U.S. Department of State; The World Bank; World Port Rankings, American Association of Port Authorities; Airports Council International; World Economic Forum's Growth Competitiveness Index; World Economic Forum's Global Information Technology Report; Central Intelligence Agency's World Fact Book; U.S. Direct Investment Abroad, Bureau of Economic Analysis; and Index of Economic Freedom, The Heritage Foundation



## CANADA

<b>GDP:</b>	\$1,640
<b>EXPORTS:</b>	\$433
<b>IMPORTS:</b>	\$444
<b>U.S. FDI 2016:</b>	\$364
<b>FDI 4yr TREND:</b>	↑↓↓↑

TOTAL RANK	8
T I B X	2 3 3 0

Economy is very much tied to global commodity markets - for better or worse. Last year's performance trended toward the former as consistent 3% quarterly GDP growth buffeted prospects. NAFTA uncertainty remains a concern, but there's less at stake than Mexico's exposure.

## MEXICO

<b>GDP:</b>	\$1,142
<b>EXPORTS:</b>	\$407
<b>IMPORTS:</b>	\$417
<b>U.S. FDI 2016:</b>	\$88
<b>FDI 4yr TREND:</b>	↓↓↓↑

TOTAL RANK	4
T I B X	2 1 2 -1

NAFTA uncertainty, a U.S. mandate to re-shore manufacturing, and recurring violence have cast a pall over Mexico's short-term prospects.

## PANAMA

<b>GDP:</b>	\$59
<b>EXPORTS:</b>	\$16
<b>IMPORTS:</b>	\$21
<b>U.S. FDI 2016:</b>	\$4
<b>FDI 4yr TREND:</b>	↓↓↓↑

TOTAL RANK	8
T I B X	3 1 3 1

An expanded canal only augments the country's value proposition as a logistics and distribution crossroads—notably as a postponement hub for value-added product differentiation.

## CHILE

<b>GDP:</b>	\$263
<b>EXPORTS:</b>	\$65
<b>IMPORTS:</b>	\$60
<b>U.S. FDI 2016:</b>	\$29
<b>FDI 4yr TREND:</b>	↑↓↓↑

TOTAL RANK	6
T I B X	2 2 2 0

The Pacific Puma remains one of South America's few shining economies, thanks to sound economic development policies, strong natural resources, and technology investment.

# The Americas

North America's prospects are largely tied to ongoing and unsettled NAFTA negotiations between its three-largest economies.

"Rules of origin" is a focal point for U.S. negotiators looking to raise the threshold for the percentage of products (automobiles, notably) sourced from NAFTA and the United States. The Trump administration has also raised concerns of anti-competitive subsidies in Canada, specifically around dairy and timber production. Threats to impose tariffs—which the United States has already delivered on appliances, solar panels, steel, and aluminum—could ratchet up retaliatory reactions from impacted countries such as China. While the United States may not hold Canada and Mexico equally accountable, Mexico—long a low-cost maquila-manufacturing machine—is especially vulnerable to shifting U.S. trade policies.

Panama's star continues to shine as traffic through the canal encourages more investment in logistics infrastructure and capabilities that attract value-added distribution activity. But Venezuela's growing socio-economic crisis is a concern. Refugees are flooding Panama and Colombia, where commodity dependency and an uncertain FARC peace pose greater downside exposures.

Chile finally shows signs of recovery. Brazil has been beset by political scandal, corruption, and misplaced infrastructure spending. Transport connectivity and complex tax structures remain problems. But private consumption is starting to grow amid low interest rates, attracting entrepreneurial investors.

## COLOMBIA

<b>GDP:</b>	\$306
<b>EXPORTS:</b>	\$37
<b>IMPORTS:</b>	\$45
<b>U.S. FDI 2016:</b>	\$6
<b>FDI 4yr TREND:</b>	↑↓↓↓

TOTAL RANK	5
T I B X	2 1 2 0

Its impressive economic transformation and tenuous peace agreement with FARC is now under threat amid fluctuating global commodity prices, Venezuelan refugee crisis, and looming presidential election.

**FDI** U.S. Foreign Direct Investment  
**T** Transportation Infrastructure  
**I** IT Competency  
**B** Business Culture  
**X** X-Factor  
 All amounts in \$US billions.

## BRAZIL

<b>GDP:</b>	\$2,081
<b>EXPORTS:</b>	\$215
<b>IMPORTS:</b>	\$152
<b>U.S. FDI 2016:</b>	\$64
<b>FDI 4yr TREND:</b>	↓↓↓↑

TOTAL RANK	4
T I B X	2 1 1 0

Long saddled by government corruption, laggard leadership, poor infrastructure, and labyrinthine tax structures, glimpses of recovery emerged in late 2017. Hopes of continuing deregulation and privatization will stoke private sector investment and growth.

# Europe

Brexit is starting to be impactful. Multinationals with footprints in Britain are feeling the strain of uncertain trade politics. According to a recent poll by the Competitiveness and Innovation Framework Program, 63 percent of EU businesses with suppliers in the United Kingdom expect to relocate parts of their supply chains. Beyond that, many manufacturers are rethinking their logistics networks.

The United Kingdom's messy breakup with the EU, a contrast of populist cause and economic effect, is an appropriate backdrop for Europe's current circumstances. Eurozone business has been booming. IHS Markit's Composite Purchasing Managers' Index is largely positive, boding well for short-term expansion.

But there are clouds on the horizon. Angela Merkel has struggled to form a coalition government as populist sensibilities envelope Europe. That Germany, the EU's voice of pragmatism, has been forced to look inwardly while Brexit negotiations hang in the balance is disconcerting. Social unrest in Italy and Spain is no less inspiring, especially as economic reforms go wanting. And President Trump holding the European Union in contempt of U.S. trade policies with new steel and aluminum tariffs also target Germany's automobile industry.

The reality for Europe? Its union is cracking as nationalist politics and protectionism take precedence over regional trade.

## GERMANY

<b>GDP:</b>	\$3,652	<b>TOTAL RANK</b> <b>8</b> <b>T I B X</b> <b>4 3 2 -1</b>
<b>EXPORTS:</b>	\$1,401	
<b>IMPORTS:</b>	\$1,104	
<b>U.S. FDI 2016:</b>	\$108	
<b>FDI 4yr TREND:</b>	↓↓↓↑	

Growing domestic discord as Angela Merkel's government loses power couldn't come at a worse time. Brexit talks and EU stability are paramount concerns for the continent's leading economy.

- FDI** U.S. Foreign Direct Investment
- T** Transportation Infrastructure
- I** IT Competency
- B** Business Culture
- X** X-Factor

All amounts in \$US billions.

## FRANCE

<b>GDP:</b>	\$2,575	<b>TOTAL RANK</b> <b>7</b> <b>T I B X</b> <b>3 2 2 0</b>
<b>EXPORTS:</b>	\$541	
<b>IMPORTS:</b>	\$576	
<b>U.S. FDI 2016:</b>	\$78	
<b>FDI 4yr TREND:</b>	↑↑↑↑	

The eurozone's second-largest economy grew faster than expected in 2017 on the strength of corporate investment and domestic consumption. High unemployment still remains a problem.

## BELGIUM

<b>GDP:</b>	\$492	<b>TOTAL RANK</b> <b>7</b> <b>T I B X</b> <b>3 2 2 0</b>
<b>EXPORTS:</b>	\$309	
<b>IMPORTS:</b>	\$306	
<b>U.S. FDI 2016:</b>	\$56	
<b>FDI 4yr TREND:</b>	↑↓↓↑	

A re-export reliant economy with few natural resources beyond its centralized European location, the country has become a hotbed for logistics distribution hubs thanks to excellent transportation infrastructure.

## SWITZERLAND

**GDP:** \$681  
**EXPORTS:** \$337  
**IMPORTS:** \$287  
**U.S. FDI 2016:** \$173  
**FDI 4yr TREND:** ↑↑↑↑

TOTAL RANK  
**8**  
 T I B X  
 3 3 2 0

Apart from a favorable location in the crossroads of Europe, strong financial sector and high-tech manufacturing are magnets.

## RUSSIA

**GDP:** \$1,469  
**EXPORTS:** \$337  
**IMPORTS:** \$213  
**U.S. FDI 2016:** \$11  
**FDI 4yr TREND:** ↓↓↓↑

TOTAL RANK  
**4**  
 T I B X  
 2 1 1 0

Long dependent on natural resources Putin has signaled the country needs to privatize to drive growth and insulate from global commodity fluctuations.

## POLAND

**GDP:** \$510  
**EXPORTS:** \$221  
**IMPORTS:** \$222  
**U.S. FDI 2016:** \$12  
**FDI 4yr TREND:** ↓↓↓↑

TOTAL RANK  
**5**  
 T I B X  
 2 1 2 0

Escaping the vestiges of Communism, it took advantage of cheap manufacturing and proximity to key markets to attract foreign investment. Now the government wants more control over policy to drive entrepreneurship and grassroots economic development so the country is more self sufficient and less dependent on FDI.

## NETHERLANDS

**GDP:** \$825  
**EXPORTS:** \$526  
**IMPORTS:** \$435  
**U.S. FDI 2016:** \$847  
**FDI 4yr TREND:** ↑↑↑↑

TOTAL RANK  
**10**  
 T I B X  
 4 3 3 0

It remains the model for European logistics excellence with a strong transportation pedigree, strong government stimulus around domestic consumption, and favorable policies that attract heavy foreign investment.

## TURKEY

**GDP:** \$841  
**EXPORTS:** \$157  
**IMPORTS:** \$197  
**U.S. FDI 2016:** \$3  
**FDI 4yr TREND:** ↓↓↓↑

TOTAL RANK  
**4**  
 T I B X  
 2 1 1 0

While recent socio-political disease has unsettled foreign trade prospects and investment, it will likely be the European gateway to China's New Silk Road initiative—helping to spur new logistics investment.

## UNITED ARAB EMIRATES

<b>GDP:</b>	\$379	<b>TOTAL RANK</b> <b>8</b> <b>T I B X</b> <b>4 2 2 0</b>
<b>EXPORTS:</b>	\$315	
<b>IMPORTS:</b>	\$241	
<b>U.S. FDI 2016:</b>	\$13	
<b>FDI 4yr TREND:</b>	↑↑↓↓	

With two world-class ports and airports in Dubai, the country has become one of the foremost ocean-air hubs in the world. Bodes well for nascent trade development into Africa.

## Middle East/ Africa

OPEC countries were caught off guard after President Trump's victory in the 2016 U.S. elections. They were forced to react rather than dictate, as Trump's intent to grow U.S. oil production put them in an untenable position—losing value and share.

Consequently, Middle East countries have been diversifying their economies away from volatile commodity trades. The United Arab Emirates has long been a model to its peers. Dubai, never at the epicenter of oil/petroleum production in country, built itself into a transportation and logistics hub with ports and airports ranked in the world's top 50. The city has also become a financial and trade center for the region. Now the Saudis are looking to follow suit with development of logistics industrial zones near the Jeddah Islamic Port.

Middle East foreign interest and investment are also tied to its location. As China builds out a New Silk Road trade route, Africa looms large on its agenda. The continent still lags in transportation infrastructure. Egypt, South Africa, and Nigeria are top economies. Yet all have faced considerable social upheaval, political unrest, and commodity dependency—opening the door for others to take control of a developing labor and demand market.

## SOUTH AFRICA

<b>GDP:</b>	\$344	<b>TOTAL RANK</b> <b>4</b> <b>T I B X</b> <b>2 1 2 -1</b>
<b>EXPORTS:</b>	\$78	
<b>IMPORTS:</b>	\$80	
<b>U.S. FDI 2016:</b>	\$5	
<b>FDI 4yr TREND:</b>	↑↑↓↓	

Sustained economic progress has been fleeting as social unrest, sluggish reform, political uncertainty, corruption, high unemployment, and high transport costs dissuade investment.

- FDI** U.S. Foreign Direct Investment
  - T** Transportation Infrastructure
  - I** IT Competency
  - B** Business Culture
  - X** X-Factor
- All amounts in \$US billions.



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# Southeast Asia & India

Featuring the second-largest container port in the world and booming high-tech trade, Singapore is attracting significant foreign investment. It also serves as a good example for neighbors such as Malaysia, Indonesia, and Thailand—long exploited for their abundance of natural resources. They are looking to leverage Singapore's proximity to establish more vertically integrated processing and value-added manufacturing sectors that help insulate against commodity fluctuations. As a predominant transshipment hub, that was once a concern for Singapore as well.

India's modernization under Prime Minister Modi

continues at pace. While demonetization and a troubled Goods and Services Tax rollout took some luster off its shine, economic prospects burn bright. Simplified tax structures make it easier for the private sector to flourish. India has also eased FDI rules to enable more outside-in investment and development as it looks to spark inside-out domestic growth. Still, for a country soon to become the largest populace in the world, India has only one port and one airport ranked in the world's top 50. Road and rail infrastructure and port density are outstanding concerns. Don't overlook China's encroachment west with the "One Belt One Road" initiative.

## INDONESIA

**GDP:** \$1,011  
**EXPORTS:** \$158  
**IMPORTS:** \$142  
**U.S. FDI 2016:** \$15  
**FDI 4yr TREND:** ↑↑↑↑

TOTAL RANK  
**4**  
 T I B X  
 2 1 1 0

Transport infrastructure remains a challenge for the world's largest archipelago country. Efforts to attract investment in more vertically integrated industries will offset reliance on commodity exports like palm oil and coal.

## THAILAND

**GDP:** \$438  
**EXPORTS:** \$228  
**IMPORTS:** \$190  
**U.S. FDI 2016:** \$12  
**FDI 4yr TREND:** ↓↓↓↓

TOTAL RANK  
**5**  
 T I B X  
 3 1 1 0

Southeast Asia's second-largest economy is looking to evolve beyond the "cheap labor and natural resources" stereotype by investing in technology and upskilling its manufacturing workforce.

## MALAYSIA

**GDP:** \$310  
**EXPORTS:** \$188  
**IMPORTS:** \$163  
**U.S. FDI 2016:** \$14  
**FDI 4yr TREND:** ↑↓↓↓

TOTAL RANK  
**7**  
 T I B X  
 3 2 2 0

Sound transportation infrastructure and progressive tech investment make the developing economy a leader among its peers. Semiconductor manufacturing and natural resource-related industries are helping to drive growth.

## INDIA

**GDP:** \$2,439  
**EXPORTS:** \$299  
**IMPORTS:** \$427  
**U.S. FDI 2016:** \$33  
**FDI 4yr TREND:** ↓↓↓↓

TOTAL RANK  
**6**  
 T I B X  
 2 1 2 1

Its star is on the rise as policy reforms (GST) and easing FDI restrictions help spur private sector growth. Business process outsourcing and IT R&D remain strengths—transport infrastructure remains a pain point. Despite a population of 1.3 billion, India features only one port and one airport in the world's top 50.

## SINGAPORE

**GDP:** \$306  
**EXPORTS:** \$396  
**IMPORTS:** \$310  
**U.S. FDI 2016:** \$259  
**FDI 4yr TREND:** ↑↑↑↑

TOTAL RANK  
**9**  
 T I B X  
 4 3 2 0

The city-state continues to serve as a model government. Long a leader in global transportation, it's now laying a foundation in digital innovation— attracting new investment from global businesses looking to establish innovation centers and R&D labs.

## TAIWAN

**GDP:** \$572  
**EXPORTS:** \$345  
**IMPORTS:** \$273  
**U.S. FDI 2016:** \$16  
**FDI 4yr TREND:** ↓↓↓↓

TOTAL RANK  
**8**  
 T I B X  
 3 3 2 0

Sovereignty remains up for debate, while strengthening domestic consumption and exports bolster economic growth. Concerns of cross-strait coercion and retaliation against independence rhetoric have thus far been muted.

**FDI** U.S. Foreign Direct Investment  
**T** Transportation Infrastructure  
**I** IT Competency  
**B** Business Culture  
**X** X-Factor  
 All amounts in \$US billions.

# Asia

The United States pulled out of the Trans-Pacific Partnership (TPP), creating a notable void. Will Japan pick up the slack? Or has the United States handed China the keys to a trade bloc that will soon feature two-thirds of the world's middle class? Time will tell.

Intra-Asian trade has been on the make as China's demand economy continues to mature, opening doors for Vietnam, Malaysia, Indonesia and others to emerge as preferred low-cost manufacturing locations. More telling, President Xi Jinping's government is heavily invested in the "One Belt One Road" initiative as it looks

to create an intermodal land bridge to Europe while also opening Central Asia to trade. Who needs TPP?

Drama continues in northern Asia. North Korea is a wild card, and unwelcome distraction for South Korea—already preoccupied with government corruption and an uncertain U.S. free trade agreement. Taiwanese independence is similarly obfuscated, making for an uneasy relationship with cross-strait administrator, China—also its top trade partner and high-tech manufacturing competitor.

## HONG KONG

<b>GDP:</b>	\$334
<b>EXPORTS:</b>	\$540
<b>IMPORTS:</b>	\$461
<b>U.S. FDI 2016:</b>	\$66
<b>FDI 4yr TREND:</b>	↑↑↑↑

TOTAL RANK
<b>8</b>
T I B X
3 3 2 0

A foremost transshipment hub, the autonomous territory's economy has always pivoted with global trade trends. The shadow of Shenzhen, China's tech-driven boom increasingly looms larger.

## CHINA

<b>GDP:</b>	\$11,940
<b>EXPORTS:</b>	\$2,157
<b>IMPORTS:</b>	\$1,731
<b>U.S. FDI 2016:</b>	\$93
<b>FDI 4yr TREND:</b>	↑↑↑↑

TOTAL RANK
<b>6</b>
T I B X
3 1 2 0

Concerns over sluggish economic growth have dissipated. Strong infrastructure investment and an outside-in approach to developing a New Silk Road linking Asia and Europe are positives. U.S. trade relations and President Xi Jinping's "governance for life" mandate are emerging concerns.

## SOUTH KOREA

<b>GDP:</b>	\$1,530
<b>EXPORTS:</b>	\$552
<b>IMPORTS:</b>	\$448
<b>U.S. FDI 2016:</b>	\$39
<b>FDI 4yr TREND:</b>	↓↓↑↑

TOTAL RANK
<b>6</b>
T I B X
3 3 1 -1

Presidential impeachment, uncertainty over a U.S.-Korea free trade agreement, and unsettled diplomacy with its neighbor to the north shade the country's prospects, Olympics infrastructure infusion notwithstanding.

## VIETNAM

<b>GDP:</b>	\$216
<b>EXPORTS:</b>	\$195
<b>IMPORTS:</b>	\$190
<b>U.S. FDI 2016:</b>	\$2
<b>FDI 4yr TREND:</b>	↑↑↑↑

TOTAL RANK
<b>6</b>
T I B X
3 1 1 1

Featuring two world-class container ports (both in Saigon) and one airport (Hanoi), the country has become a low-cost manufacturing hub within a burgeoning intra-Asia trade network.

## JAPAN

<b>GDP:</b>	\$4,884
<b>EXPORTS:</b>	\$683
<b>IMPORTS:</b>	\$626
<b>U.S. FDI 2016:</b>	\$115
<b>FDI 4yr TREND:</b>	↓↓↑↑

TOTAL RANK
<b>8</b>
T I B X
3 3 2 0

Structural reform under Abenomics regime has helped stimulate economic growth. But an aging population and workforce remain lingering socio-economic concerns.



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# The World of Global Trade Management Solutions

**Getting drawn into choosing a GTM solution?  
We sketched out some leaders to help you get started.**



If your company imports or exports physical goods or digital products, or conducts e-commerce around the world, there's a good chance you need a global trade management (GTM) system.

Robust GTM systems supplement or connect with existing enterprise resource planning systems, transportation management systems, or other logistics systems to ensure that outbound sales and/or inbound materials do not run afoul of trade restrictions from any country involved.

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GTM solutions automate complex international supply chain sourcing, logistics, cross-border trade, and regulatory compliance activities. A holistic, end-to-end GTM solution combines sourcing and logistics, plus content, to manage risk through proactive collaboration and improved efficiencies across the entire supply chain.

In the market for a GTM solution? Here are some leading vendors to explore.

# Global Trade Management Guide

Some leading vendors in the GTM solutions market.

Vendor & Location	Product & Website	Description	PLATFORM		FEATURES & FUNCTIONALITY								
			Licensed to User (installed locally)	Hosted on Vendor's Website	Cloud-based	Supplier Management	Transportation Management	Booking	Event Management	Compliance	Analytics and Reporting	Foreign Trade Zone	
Acuitive Solutions Charlotte, NC	Global TMS www.acuitivesolutions.com	Dynamically routes inbound/outbound shipments to align mode, provider, and service selections based on each shipment's need/cost.			●	●	●						
Amber Road East Rutherford, NJ	Global Trade Management Solutions www.amberroad.com	Cloud-based platform that plans, optimizes, and executes all aspects of global trade, with broad functionality.			●	●	●	●		●	●	●	●
Aptean Alpharetta, GA	TradeBeam aptean.com/products/tradebeam-gtm	Delivered on an agile, multi-tenant, highly secure platform. Integrates easily with other back-office solutions.			●					●	●	●	
Blinco Systems Toronto, ON	3rd Wave Global Trade Solutions www.3rdwave.com	Reduces complexity of operations, delivers visibility, and supports collaboration among internal and external partners and providers.	●		●	●	●	●	●	●	●	●	●
BluJay Solutions Chelmsford, MA	Customs Management www.blujaysolutions.com	Manages connectivity to all global customs agencies and stays up to date with customs and compliance regulations around the world.	●	●	●	●	●	●	●	●	●	●	●
CargoSmart San Jose, CA	CargoSmart Transportation Management www.cargosmart.com	Provides shipment management solutions that benchmark ocean carrier sailing schedules, performance, and contracts.		●	●	●	●	●	●	●	●	●	
CDM Software Houston, TX	Global Trade Management Software www.cdmsoft.com	Streamlined global trade solutions that reduce paper trails and let businesses trade electronic information using the latest technology.	●		●	●	●	●	●	●	●	●	●
ClearTrack Brentwood, TN	Clarity www.cleartrack.com	Global trading network and software enabling global sourcing, product quality and safety management, and logistics visibility.		●	●	●	●	●	●	●	●	●	●
Descartes Systems Group Waterloo, ON	Global Trade Content www.descartes.com	Management tools for logistics operations, compliance, classification, valuation, denied party screening, and market research.	●	●	●	●	●	●	●	●	●	●	●
e-Freight Technology Alhambra, CA	eCargo efreight.com	Freight management, security filing, and supply chain management solutions to serve the forwarding and international shipping industry.	●	●	●	●	●	●	●	●	●	●	●
eCustoms Buffalo, NY	Visual Compliance www.visualcompliance.com	Compliance solutions, including restricted party screening, integration, license management, classification, document creation, and AES filing.	●	●	●	●	●	●	●	●	●	●	●
Elemica Wayne, PA	Elemica Global Trade Management www.elemica.com	Collaborative end-to-end visibility across global supply chains for a critical mass of trading partners utilizing Elemica's B2B network.			●	●	●	●	●	●	●	●	●
enVista Indianapolis, IN	myShipINFO myshipinfo.com	Global freight audit & payment solution providing shipment visibility, carrier performance monitoring, currency and VAT visibility.	●	●	●		●			●	●		
Freight Management Anaheim, CA	Logistics freightmgmt.com	Applies account codes, gives location, consolidates orders, provides option rates upon inquiry. Produces bills of lading and audits bills.	●		●		●	●		●	●		
Freightgate Fountain Valley, CA	Freightgate Logistics Cloud www.freightgate.com	Flexible, scalable solution offering compliance tools, ISF, denied-party screening, Harmonized Tariff System, dynamic routing, and analytics.			●	●	●	●	●	●	●	●	●

Vendor & Location	Product & Website	Description	PLATFORM		FEATURES & FUNCTIONALITY								
			Licensed to User (installed locally)	Hosted on Vendor's Website	Cloud-based	Supplier Management	Transportation Management	Booking	Event Management	Compliance	Analytics and Reporting	Foreign Trade Zone	
Freightos Miami Beach, FL	International Freight Marketplace www.freightos.com	Instant air, ocean and land freight quote comparison, booking and management, across 50+ global logistics providers and carriers.			●	●	●	●				●	
GT Nexus Oakland, CA	Global Network Management Solutions www.gtnexus.com	Cloud-based collaboration platform that automates supply chain processes across entire global trade communities.	●	●	●	●	●	●	●	●	●	●	●
Integration Point Charlotte, NC	Global Trade Management Software www.integrationpoint.com	Suite of global management products enabling companies to achieve global compliance while maximizing supply chain savings.			●						●	●	●
LOG-NET Tinton Falls, NJ	LOG-NET www.log-net.com	A global end-to-end cloud supply chain solution. Orders, documentation, restricted parties, visibility and execution in a single platform.			●	●	●	●	●	●	●	●	
MIQ Logistics Overland Park, KS	International Supply Chain www.miq.com	Delivers value by combining services across MIQ Logistics to create a complete end-to-end solution.	●	●	●	●	●	●	●	●	●	●	●
Navigate Mendota Heights, MN	Navigate www.navigate.com	Provides visibility, end-to-end tracking, vendor/manufacturer compliance, organized collaboration, delivery/pickup confirmations and documents.			●	●	●	●	●	●	●	●	●
Oracle Redwood City, CA	Global Trade Management Solutions www.oracle.com	Optimizes and streamlines business processes related to cross-border trade	●	●	●	●	●	●	●	●	●	●	●
nVision Global McDonough, GA	iMPact TMS nvisionglobal.com	Provides supplier/order management and shipment planning & execution. Cloud based global track & trace tool with multi-mode, multi-carrier visibility.	●	●	●	●	●	●	●	●	●	●	●
Precision Software (QAD) Downers Grove, IL	Global Trade Management precisionsoftware.com	Automates documentation production and customs reporting, helping companies adhere to regulatory requirements and reduce hidden costs.	●		●		●				●	●	
QuestaWeb Clark, NJ	Global Trade Management Software www.questaweb.com	Facilitates timely and compliant movement of goods from origination to destination, across borders, anywhere in the world.	●		●	●	●	●	●	●	●	●	●
SAP Newtown Square, PA	Global Trade Services www.sap.com	Speeds customs clearance, reducing unnecessary delays. Minimizes fines and penalties from trade compliance violations	●		●	●	●	●	●	●	●	●	●
SEKO Logistics Itasca, IL	Global Trade Management Tool www.sekologistics.com	Fully integrated into MySEKO. Provides instant access to all current regulations, for any combination of countries.	●	●	●	●	●	●	●	●	●	●	●
TOC Logistics Indianapolis, IN	Global Logistics Services www.toclogistics.com	Provides visibility, and metrics tracking and reporting.		●		●	●	●			●	●	●
Transportation Insight Hickory, NC	Enterprise Logistics transportationinsight.com	Combines multi-modal expertise with a blended technology platform to improve agility to respond to changing global shipping demands.			●		●	●	●	●	●	●	●
TransportGistics Mt. Sinai, NY	RouteGistics TransportGistics.com	Reduces, uncovers, and avoids excessive global transport/logistics costs. Improves operations while managing discrete transport and logistics.	●	●	●	●	●	●	●	●	●	●	●



# E-Commerce: Cultivating a New Logistics Landscape

**E-commerce continues to mow down traditional business practices. To adapt, companies serving manufacturing, industrial, and retail customers are seeding their portfolios with new services, and not letting any grass grow under their feet.**

**A**s e-commerce continues to make inroads across industry sectors, it's disrupting numerous business models. That includes those of manufacturers who've traditionally been several steps removed from end consumers—the ones most known for shopping online. In 2015, e-commerce shipments accounted for 63 percent of the value of manufacturers' overall shipments, up from 48 percent in 2010, according to U.S. Census Bureau data.

"The difference between manufacturing and retail is starting to get fuzzy," says Bob Malley, chief executive officer of Pierbridge, a Marlborough, Massachusetts-based provider of supply chain technology solutions. "For instance, more manufacturers are becoming drop-ship suppliers, and have to support a business-to-consumer (B2C) distribution model."

"Manufacturers are deciding 'we better get in the game and sell our products directly to the consumer, or Amazon's going to do it for us, taking revenue and margin we could have captured,'" says Jason Minghini, president of FW Logistics, a Centreville, Illinois-based provider of logistics and warehousing solutions with facilities dedicated to contract, food grade, and chemical and hazardous materials. A number of FW's clients, across various industries, have considered opening facilities that will allow them to go straight to consumers and bypass brick-and-mortar outlets, he says.



**Many companies outsource e-commerce logistics to FW Warehousing to leverage its low-cost, centrally located distribution and e-commerce fulfillment centers, enhanced IT capabilities, and scalability and flexibility to support growing businesses.**

A few decades ago, manufacturer supply chains often included master distributors, distributors, and retailers, explains Tim Brown, managing director of the Supply Chain & Logistics Institute at Georgia Tech. Each party earned a margin, driving up overall costs. For many transactions, e-commerce has made personal relationships less important, and shortened the distribution channel, he adds.

Another change is the consumer-like behavior of many industrial and manufacturing customers. “They want their orders fulfilled quickly, at a price they want, and delivered where they want,” says Adegoke Oke, associate professor of supply chain management at Arizona State University.

The launch of AmazonBusiness.com in 2015 provides further evidence of the continued blurring among manufacturers, distributors, and retailers. The marketplace features pricing tools and enables sellers to offer quantity discounts and list their credentials, among other functions.

“Amazon combined its expertise on the consumer side with logistics, planning, and warehousing, and is applying that knowledge to business transactions,” Brown says.

These shifts offer manufacturers and their supply chains the opportunity to expand their markets, forge closer connections with end consumers, and price dynamically. At the same time, leveraging these changes requires rethinking business practices and investments in technology, people, and in some cases, brick-and-mortar locations.

### **Challenges and Opportunities**

E-commerce has accelerated the speed with which order volumes move both up and down the supply chain. During the recession, many business buyers, noticing a drop in spending by consumers and other customers, quickly cut their own orders, says Chris Christopher, executive director of IHS Markit, which provides information and analytics to support business and government decision-making.

Small changes at the consumer level can quickly pick up momentum and impose a sizable impact on companies farther from end consumers. “It’s the bullwhip effect,” he says. “When things turn sour, they move very fast.”

Another challenge facing some manufacturers is growing pushback from retailers that are also struggling to manage changing consumer expectations,

says Sam Ganga, partner, digital strategy and transformation, with KPMG U.S. For instance, some retailers expect manufacturers to adjust their inventory placement models to better accommodate consumer demand for instant (or near-instant) order deliveries.

Meeting customers’ expectations—always a challenge—has become even more demanding. A company can lose customers if it fails to meet expectations, yet the complexity of fulfilling all orders, across all channels, accurately and on time, is significant, says Perry Belcastro, vice president, fulfillment services with Saddle Creek Logistics Services, Lakeland, Florida. Saddle Creek offers warehousing, omnichannel fulfillment, transportation, and packaging services.

“Having technology that can provide inventory visibility across channels and drive proactive management is critical for both business-to-business transactions and direct-to-consumer sales,” he says.

After all, critics find it easy to be vocal when companies fall short. “Social media opens brands to a tremendous amount of exposure,” Belcastro says.

Amidst these challenges, however, bright spots emerge. The speed of change helps when orders increase, Christopher says. Businesses that are

# The Pace of Parcel Industry Change Is Accelerating – Are You Being Left Behind?

Demand from e-commerce is driving the price of parcel quickly – currently at twice the pace of inflation – while Amazon is making free shipping commonplace, all as customers demand more and faster delivery options. Bricks-and-mortar retail isn't immune from it as customers won't wait for out-of-stock products, while also looking for same-day shipping from the store.

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electronically connected to both customers and suppliers can quickly transmit information on a bump in demand to factories and warehouses across the globe, and then capitalize on the increased interest.

### Changing Prices on the Fly

Similarly, manufacturers can quickly change prices to reflect the signals they receive from e-commerce orders and their inventory systems, Christopher says. Extra inventory might prompt lower prices, while an order backlog could signal an opening for price increases.

With e-commerce making possible direct access to end customers, manufacturers also gain an opportunity to increase brand awareness, Oke says. Some decide to sell straight to consumers, forgoing traditional distribution channels.

One challenge prompted by the rise of e-commerce is the growing volume

of smaller, more frequent and often parcel shipments, says Pierbridge's Malley. Because of increased demand, parcel costs are going up at roughly twice the rate of inflation, he notes.

What's more, those costs don't include many accessorial charges carriers are adding, such as dimensional weight rating fees, sometimes called an air tax. Shippers who make wasteful packing decisions can end up paying fees based on both weight and dimensions. So, a package of paper towels doesn't get off cheaply just because it's light.

New cartonization technology uses algorithms to find the most cost-effective way of packing each order, given the length, width, height, and weight of the items. That helps avoid the air tax, Malley says.

Because most manufacturers have already hammered down supply chain expenditures, such as labor costs, they are turning their focus to transportation,

Malley notes. One way to reduce parcel shipping costs is to ship from facilities located closer to end customers.

Another is to identify and control cost-effective carrier service selections, particularly with the growing number of parcel delivery options available for last-mile delivery. "Companies that do this will improve customer service, margins, and the bottom line," Malley says.

### Addressing Parcel Challenges

Accomplishing this means addressing several challenges. Freight, less-than-truckload, and truckload shipping were once regulated industries with largely standard operating processes and documentation, Malley says. But that has never been the case with parcel shipments. Every parcel carrier has proprietary ratings, labels, and tracking formats. "It's the Wild West," he adds.

Moreover, traditional freight transportation management systems (TMS) have largely ignored parcel modes, says Mark Picarello, chief operating officer for Pierbridge. As a result, many companies have only a fragmented view of their parcel shipping spend. "They have a point shipping system over here, and a carrier-supplied solution over there," he says. "Because data is locked in silos, they don't have a full understanding of all their expenditures."

A parcel TMS solution can upload all shipment data to a cloud-based data warehouse. Shippers can analyze spending trends, identify potential cost savings, and engage in predictive analytics. The result? "They can make better decisions and control costs," Malley says.

Another trend is the shift from opening a handful of "mega, million-square-foot distribution centers" scattered across the country, to smaller facilities in a greater number of locations, Minghini says.

A company that might have opened four mega distribution centers, one in each corner of the United States, now is more likely to consider what Minghini calls "flex space." That could include, for instance, 20,000 square feet of product stored in St. Louis, 20,000 square feet in Dallas, and yet another 20,000 square feet outside Pittsburgh.





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“That way, manufacturers can get their product to the customer more quickly,” he says. “It’s causing a radical shift in real estate buying and supply chain management.”

On top of that, many consumer and business-to-business companies might need, say, 30,000 square feet of storage for most of the year, along with the ability to flex up to 100,000 square feet during peak season. “And, they’ll need that model in 10 cities,” Minghini notes.

“Because space and workforce flexibility have become increasingly key, working with a solid third-party logistics (3PL) provider often makes sense,” says Mike Dieckhaus, director of business development with FW Logistics. A 3PL can offer many companies the flexibility they need, when they need it.

Because 3PLs can spread their technology investment across multiple organizations, they can offer solutions that might be outside the budget of an individual company. “For instance, multiple companies can use our pick-to-light line, offering each one flexibility,” Dieckhaus says.

FW also is able to invest in its own fleet of trucks, which allows it to provide the flexibility and speed many organizations need when moving products.

The end goal is “using technology to enable inventory visibility across all channels within a distribution network that provides optimal delivery speed at the best cost,” Belcastro says.

### Next Steps

Success in today’s business-to-business e-commerce environment often requires multiple actions. One is developing a customer-centric supply chain, Ganga says. The traditional pressures placed on supply chains—to deliver the best products at the cheapest prices—aren’t going away, of course. Now, however, supply chain organizations are “expected to delight customers,” he adds.

That requires a rethinking. Supply chain organizations have to understand all segments of their companies’ customer base, and how and why they buy. “Gone are the days of one-size-fits-all,” Ganga says. “You need to create supply chain archetypes.”

What’s more, accomplishing this transition won’t result from incremental improvement. It requires looking at the world through a different lens. “You can’t just make and deliver products,” Ganga says.

Many supply chain organizations currently rely on lagging indicators—for instance “44,000 orders were received last month, and 42,000 shipped”—to guide business decisions. They need to

**“Improved predictive capacity is key. Trying to ensure fast delivery times is almost impossible without good forecasting.”**

**—Adegoke Oke, associate professor of supply chain management, Arizona State University**

shift to leading indicators, Ganga says. That likely requires employing a mix of artificial intelligence and machine learning to arrive at signals that can act as proxy for leading indicators. It also requires greater interaction between a company’s supply chain organization and its sales and marketing functions.

A company whose products ease spring allergy symptoms, for instance, may assemble government data, social media posts, online search volume data, point-of-sale results, and perhaps third-party data to estimate the severity of the upcoming allergy season. Then they can more intelligently and efficiently allocate products to each location.

“Improved predictive capacity is key,” Oke says. “Trying to ensure fast delivery times is almost impossible without good forecasting.” A solid flow of supply chain and inventory information also is critical, he adds.

One important factor for success in an omnichannel, e-commerce world is “an order management system that allows you to see the inventory across all channels in real time,” Belcastro says.

The system should be able to determine the optimal fulfillment source for

each product, based on its location, and the customer’s location, Belcastro says. Say you have inventory in Nevada and in Ohio, and you need to fill an order placed from Phoenix. The system, such as the one Saddle Creek offers, should steer you to the Nevada location.

Before a company can rationalize its SKUs and inventory levels, it needs to “understand exactly what SKUs are moving, what SKUs aren’t moving, and how much of each SKU it has,” Minghini says. That requires systems that can monitor ordering patterns, enabling the company to shift inventory from one distribution center to another to achieve quality service, while keeping transportation costs in check.

### The Distribution Network

Along with technology, a distribution network that enables an organization to optimize the location of its inventory is key. Given transit time and shipping costs, operating from one or two locations rarely is optimal any more.

A 3PL with a network of facilities provides the flexibility needed to manage inventory and orders across multiple locations and to accommodate growth, Belcastro says. That’s key for companies that lack the volumes needed to make it practical to operate from multiple locations. As a company grows, it can expand throughout the 3PL’s network without an inordinate capital investment.

Another type of flexibility an organization needs today is within its own operations. Many companies need to ship small parcels to consumers, and also build pallets for wholesale and retail deliveries. “We’re seeing more demand for these dual capabilities,” Belcastro says.

In addition, more companies also are looking for some level of customization, such as embroidery, engraving, or special product configurations such as multipacks, Belcastro says. Companies that decide to offer these solutions often need to invest in training and capital equipment. They also need to determine how to fit these capabilities into the flow of just-in-time shipping.

“Managing the overall throughput of these services adds complexity,” Belcastro says.

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Many companies turn to 3PLs to help them meet these goals cost effectively. “We view ourselves as warehousing, distribution, and logistics experts,” Belcastro says. “Many companies prefer to stay focused on product development, brand management, and customer lifetime value expansion, and leave the rest to us.”

Customer service also has become a critical differentiator. Simply offering products on a shelf no longer suffices, as somebody else will come along to do that more quickly and cheaply. “You need a compelling hook with customers,” Brown says. This can mean offering skilled technicians, installers, and/or product expertise.

Developing these attributes requires significant investment in technology, people, and locations. Failing to address the disruption e-commerce is causing, however, entails its own risk. “Technology often requires a long lead time,” Oke says. “If you wait, you might get left behind.”

That’s true even for market leaders facing ankle biters who are offering

enhanced products or services. Not only could the new entrants siphon off customers, but the market will soon expect leading companies to match the upstarts’ offerings.

### Looking Ahead

The changes prompted by e-commerce show no signs of abating. For example, within the next several years, practical applications for blockchain technology are likely to emerge. That’s especially true in small parcel shipments, given the current lack of standards in this market. “Blockchain offers hope for new entrants to get in on a trusted and standardized platform,” Malley says.

In fact, several parcel companies are sponsoring blockchain pilots to help execute smart contracts, Malley says. Here’s how it could work: Because blockchain essentially is a ledger, a solution could record and retain the history of the shipping transaction, such as when it was picked up and by whom, and when and where it was delivered, among other information. This technology could be particularly valuable

for manufacturers of pharmaceuticals, alcohol, and other products that must maintain a chain of custody, he adds.

The number of brick-and-mortar stores will drop, while online ordering and fulfillment will continue to grow at an exponential pace. “Many shopping malls will be repurposed into warehouses,” Minghini says.

Transportation rates will continue to head up, Minghini predicts, noting that average truck drivers in the United States are 50 years old or older. In addition, the ELD (electronic logging device) mandate will cause some drivers to leave the field. “That will create another crunch and drive rates up even further,” he adds.

Indeed, labor shortages exist in many supply chain functions, boosting competition for qualified candidates. “3PLs can offer the flexibility of sharing labor across multiple customers,” Belcastro says.

“To date, the supply chain has been a behind-the-scenes competitive edge,” Ganga says. “The supply chain of the future needs to be a front-and-center competitive edge.” ■

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Dedicated truckload fleets fill up on technology solutions that pump crucial data from power units and trailers and deliver it to shippers ready to give their supply chains the gas.

By Merrill Douglas

**W**hen you ship full truckloads, using a private or dedicated fleet eliminates one major burden: searching for capacity. But you'll still contend with most of the usual transportation challenges, including supply chain impatience.

Customers want their products fast, and they want them on time. They also want to know where their freight is, and often what condition it's in—or, at least, to be notified right away when anything about a shipment diverges from plan.

Visibility breeds confidence in the supply chain. "There is an increased expectation around transparency, and the speed of information," says Gary Allen, vice president of supply chain excellence at Miami-based Ryder, whose dedicated transportation division employs more than 7,000 drivers in North America.

Technologies for monitoring shipments and delivering that information to customers continue to evolve, providing new opportunities to improve efficiency and service.

### Chicken Challenge

One company enjoying the benefits of those technologies is Wayne Farms in Oakwood, Georgia. Wayne Farms ships fresh poultry to food processors, and both fresh and prepared chicken products to a variety of customers, including food service distributors, restaurant chains, and retail stores.

In two regions—Northern Alabama and Georgia, and Southern Alabama—Wayne Farms relies on dedicated fleets

provided by Penske Logistics. Those trucks move full truckloads of fresh product from the company's deboning plants in the region to its two processing plants, and deliver fresh and prepared products to customers.

Once they place those orders, most customers expect to receive their product the next day. "They want that truck to deliver in the morning, so they can get the product on their trucks and deliver to customers a few hours later," says Ken Esser, director, inventory and logistics at Wayne Farms.

Wayne Farms relies on Penske not only to supply trucks and drivers for those deliveries, but also to manage the moves. Penske's dispatch management system generates routes and calculates an estimated time of arrival for each delivery. "We also have three systems on Wayne Farms' equipment to give us visibility," says Tom Scollard, vice president, dedicated contract carriage at Penske, based in Reading, Pennsylvania.

The first is an onboard trailer tracking system, which monitors the location of each refrigerated trailer and the temperature inside. "I can see the unit temperature and validate the product quality," Esser says.

Trailer tracking is important because the Wayne Farms fleet includes three times as many trailers as tractors. Most of its deliveries are "drop and hook"—the driver disconnects from the trailer as it's delivered and picks up another. That means a full trailer could spend many hours in a yard, waiting to be unloaded.

"Knowing what's going on with those trailers is vital," Esser says.

The second piece of technology is Penske's proprietary in-cab mobile communications system, which lets drivers and dispatchers exchange information and provides GPS tracking data. The third piece is an onboard computer, which includes an electronic logging device (ELD) to track the driver's hours of service. That computer also monitors vehicle performance and driver behavior.

Penske transmits this information to Esser. Wayne Farms' end customers don't keep an eye on the trucks themselves. But they depend on Esser

to make sure their shipments are on track and to notify them early if anything goes wrong.

"Customer service goes a long way if we can tell them their truck will be late, before they call to ask where it is," Esser says.

Penske recently developed *Route Status* to deliver shipment information to mobile devices. Esser uses the system to track crucial loads after hours, and shipments that might be affected by bad weather.

### Where Are My Parts?

Visibility is also crucial to companies that use dedicated fleet services from Averitt Express. Those customers fall largely into two groups—automotive manufacturers that rely on Averitt to deliver components from suppliers to assembly plants, and retail chains that use Averitt to move product from distribution centers to their stores.

Speed is especially important to Averitt's automotive customers, including Nissan, Mercedes-Benz, and BMW, because their shipments support just-in-time manufacturing. An assembly line could come to a halt for lack of the right parts at the right time.

"We've got to do a great job in our processes and keep the customers informed about where we are with each route," says Brandon Fox, driver services and technology leader at Averitt Express in Cookeville, Tennessee.

Some trucks shuttle back and forth all day between one supplier and an assembly plant; others visit several providers before delivering a full trailer to the manufacturer.

Averitt's retail customers include Dollar General, Shoe Carnival, Cracker Barrel, Petco, and PetSmart. Some companies put their own logos on the dedicated trailers; others prefer trailers that carry the Averitt brand.

While the need for speed among retail shippers isn't quite as urgent as it is among auto manufacturers, retailers do need accurate ETAs. "They need to have the people in place to receive the product at their store locations," Fox says. A missed ETA, with no warning about the change, could leave the



**Wayne Farms, which ships fresh and prepared chicken, relies on dedicated fleets to get product to its customers on time.**



company paying employees to stand around waiting rather than working.

Customers in both industries require visibility into their shipments. Most get this by implementing a visibility platform from a vendor such as FourKites, MacroPoint, or 10-4 Systems. Averitt uses application programming interfaces (APIs) to feed the necessary data into customer systems.

Shipment status data comes from two sources. The Omnitracs system installed in Averitt's cabs provides real-time and historical vehicle positions, while Averitt's dispatching system provides details such as tractor number and route name. "Some customers want just the Omnitracs position data, some want just the dispatch data, and some want both," Fox says.

By comparing position data to planned ETAs, customers get early warning about shipments that might arrive late, letting them make the necessary arrangements—for example, rescheduling the personnel who are assigned to unload the truck. To give shippers further insight into factors that might affect the ETA, these platforms can overlay real-time traffic data and weather forecasts, Fox says.

### Proactive Insight

Ryder provides dedicated trucking to a broad range of customers in industries such as retail, consumer packaged goods (CPG), automotive, industrials, and metals. Besides providing trucks and drivers and managing the shipments, the company offers value-added services in disciplines such as engineering and continuous improvement.

**Retailer Dollar General depends on Averitt not only to transport products from distribution centers to stores, but also to provide shipment status information.**



Ryder uses Lytx's DriveCam to capture video if an accident occurs.

Those services focus, for instance, on how to route more efficiently. Consider a truck delivering inventory for a retail customer, making eight to 10 stops on every trip. "Our engineering team looks at how to continually improve fuel usage and service time and, importantly, drive down costs while still meeting delivery requirements," Allen says.

Among its customers, especially in CPG and retail, Ryder has recently heard requests for more frequent deliveries, with fewer units of each product on the truck. "They want their product faster, but they want the right amount when they need it," Allen says.

Shippers also want to know where the truck is and when it will arrive. "They want a proactive ETA that's pushed to their cell phones, as an example," he says. Technologies are evolving to meet that demand.

To improve visibility, Ryder has introduced a platform called RyderShare that merges data pulled from multiple sources. "Customers

have visibility to where their product is at any time, delivered on an app, on any device they want," Allen says. Besides providing an ETA, the service lets the customer know what's on the truck and the product's condition.

"But the value is more than just visibility to the trucks," Allen adds. "It's managing the data, providing analytics and insights to let customers know if and why something goes wrong."

Ryder obtains most of this data from telematics systems on the trucks, which provide GPS locations plus data about engine and driver performance. The company also installs a camera in each cab to capture video if an accident occurs.

"We proactively push this information to our customers, or our customers' customers, depending on how they want to provide that visibility," Allen says.

For customers that use refrigerated trailers, Ryder can capture data from temperature sensors. It can also install sensors that measure how much space remains on a loaded trailer, providing opportunities to add more freight.

As crucial as technology has become to running efficient truckload transportation, it doesn't operate in a vacuum. "If you don't have the people to support it and help get the job done, technology alone won't do it," Esser says.

The individuals who dispatch Wayne Farms' dedicated fleet are crucial to the operation. "They come up with ideas," he says. "But they also tell me if there's a problem before I see one. We can better solve problems that way." ■

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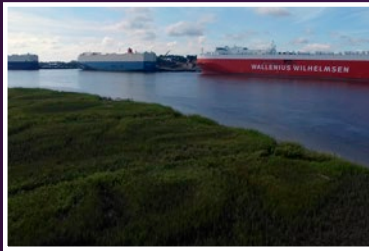
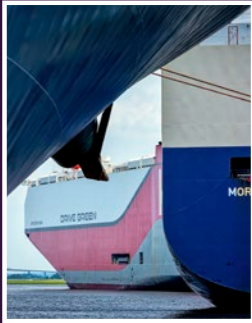
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## Some say American business and culture is stuck in a post-truth moment, where we all create our own reality. In this era, success is a relative term; we can define it individually, in whatever way we wish. To which the folks in Georgia say: Nonsense.

Here in the Peach State, where people share the conviction that natural blessings and hard work will carry you to the top, there is nothing ambiguous about the meaning of success. It is defined by taking full advantage of your existing assets and continually working to make them even better.

Certainly that is the approach Georgia takes in the logistics sphere. The state is rife with extraordinary logistical advantages, including a central geographic location, a favorable climate, a highly skilled workforce, and easy access to highways, air services, ports, and rail.

But the state's government and logistics leaders are hardly slumbering in the bright Georgia sun. On the contrary, they are working together to build on existing assets to create newer and stronger pathways to progress—by land, air, and sea.

### Full Speed Ahead

Since 1945, Georgia's ports have served as magnets for international trade and investment, enriching the state's economy and providing shippers with the most efficient and productive port facilities in the nation. Overseeing and coordinating these efforts is the Georgia Ports Authority (GPA), which creates jobs and business opportunities to benefit more than 9.7 million Georgians.

"The GPA is committed to

providing world-class service through superior operational efficiency," says GPA Executive Director Griff Lynch. "The Authority is making the necessary investments today to sustain growth and performance tomorrow."

Georgia's deepwater ports in Savannah and Brunswick, together with inland barge operations in Bainbridge and Columbus, are Georgia's gateways to the world. Through these critical conduits, raw materials and finished products flow to and from destinations around the globe.

### Contributing to the State Economy

The GPA is a state authority; a 13-member board of directors governs its activities. The governor appoints board members from the state at large to serve four-year, staggered terms. The GPA directly employs almost 1,200 trained logistics professionals; it is one of the state's largest public employers. GPA operations—together with private-sector, port-related operations—account for more than 369,000 jobs statewide, \$84.1 billion in revenue, and more than \$20.4 billion in income annually.

One gem among Georgia's ports is the Port of Savannah, composed of two modern, deepwater terminals: Garden City Terminal and Ocean Terminal.

As the nation's largest single-terminal

operation, Garden City's 1,200-acre footprint eliminates the need to move cargo between smaller terminals, delivers greater flexibility in staging cargo, and provides nine containership berths.

### Expanding the Fleet of Cranes

To better accommodate the larger vessels now calling on Savannah, Lynch says, in 2018 the GPA will commission four new Neo-Panamax ship-to-shore cranes at Garden City Terminal, bringing its fleet to 30—the most of any single terminal in North America. In 2020, the GPA will commission another four Neo-Panamax cranes.

The growing crane fleet, working over nearly 10,000 contiguous feet of dock, will be able to handle more than 1,300 container moves per hour when all 36 cranes are in place.

This growth will enhance Savannah's existing advantages, which include highly competitive rates and schedules to all major international markets.

"The Port of Savannah provides superior carrier capacity and greater scheduling flexibility, with the most shipping services on the U.S. East Coast at 36 weekly calls," Lynch says.

Those weekly calls include: 13 to Europe/Mediterranean, six to Latin America, eight to Asia via the Panama Canal, eight to Asia/India/Middle

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**The 14,000-TEU containership CMA CGM *Theodore Roosevelt*, the largest ship ever to cross the Panama Canal, sails past historic River Street to the Port of Savannah.**

East via the Suez Canal, and one to Australia/New Zealand.

Meanwhile, Ocean Terminal, Savannah's dedicated breakbulk and roll-on/roll-off facility, covers more than 200 acres and provides customers with in excess of 1.4 million square feet of covered, versatile storage.

### Port of Brunswick Shines

Some 83 miles south via I-95 is the Port of Brunswick, composed of three GPA-owned deepwater terminals, two of which are directly operated by the GPA. Its position as one of the fastest-growing auto and heavy machinery ports in North America heightens the port's well-earned reputation for productivity and efficiency. Today, more than 30 auto and heavy equipment manufacturers, supported by three auto processors, utilize the port's Colonel's Island Terminal.

At the same time, Brunswick's Mayor's Point Terminal facilitates the export of Georgia's valuable forest products, while Marine Port Terminals, operated by Logistec U.S.A., specializes in handling bulk commodities. Additionally, inland terminal operations—Port Bainbridge and Port Columbus—provide a strategic advantage for bulk commodities moving to and from the southeastern United States.

Featuring two on-terminal rail yards, the Port of Savannah's Garden City Terminal is the region's busiest intermodal gateway, handling 38 trains of

import and export cargo every week.

"Savannah's location, 100 miles closer to Atlanta than any other port, makes the terminal the perfect partner for the long-time rail hub of Atlanta," Lynch adds. "From Georgia's capital city, rail cargo fans out to reach important population centers including Memphis, Charlotte, St. Louis, and Chicago."

GPA will soon break ground on its Mason Mega Rail terminal. Through a \$44-million Build America Bureau FASTLANE grant administered by the Maritime Administration (MARAD), along with \$84 million in local matching funds, GPA will greatly expand its two on-terminal rail yards. Set for completion in 2020, the project will double rail capacity at Garden City Terminal to one million lifts per year.

Served by Class I rail providers CSX and Norfolk Southern, Savannah already boasts one of the nation's most extensive on-dock rail infrastructures. "Through this improvement, we will create a state-of-the-art facility, unique on the U.S. East Coast," Lynch says.

The improvement will add 97,000 feet of new rail at Garden City Terminal, and expand the number of working tracks from eight to 18. This will allow GPA to bring all rail switching onto the terminal, improving vehicle traffic flow around the port.

The project will allow the Port of Savannah to better accommodate 10,000-foot-long unit trains. And its

ability to build longer trains on terminal will incentivize rail carriers to expand the service area best served by the Port of Savannah—positioning GPA to rapidly increase service to an arc of inland markets, from Atlanta to Memphis, St. Louis, Chicago, and the Ohio Valley.

Later in 2018, the Appalachian Regional Port, an inland port to be operated by the GPA, will open new markets across Alabama, Tennessee, and Kentucky. On 42 acres in Northwest Georgia's Murray County, the site will feature on-terminal rail service from CSX Transportation.

The location is adjacent to U.S. 411 and features easy access to Interstate 75. The facility will handle import, export, and domestic cargo. For manufacturers in North Georgia, the Appalachian Regional Port will deliver supply chain savings and environmental benefits through reduced diesel consumption. Each container moved by rail from the inland terminal will offset 355 truck miles on Georgia highways.

### Special Services and Sustainability

The Port of Savannah is the nation's largest exporter of frozen poultry, moving 40 percent of the product that leaves the United States. Currently, the port features 104 electric-powered refrigerated container racks, which accommodate 2,496 containers of poultry and other farm products at one time. Counting 738 chassis plug-ins, Savannah's total capacity is 3,234 refrigerated boxes. This has helped grow Savannah to the busiest import-export terminal in the Southeast for refrigerated containers.

It's also one of the most efficient: Investments in upgraded cranes, lighting, and other equipment reduce fuel consumption and air-polluting emissions. Moving to electric rubber-tired gantry cranes for container handling reduces GPA's carbon footprint by 96 percent per crane. Savannah's electric ship-to-shore cranes capture enough energy from lowering boxes to power themselves for 18 minutes of each hour.

Garden City Terminal features four



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major truck gates providing a total of 48 truck lanes, which helps the terminal avoid congestion and maintain superior cargo fluidity. “The port’s single-terminal design allows for fast, simple check-in, even when moving containers for multiple shipping lines,” Lynch says.

### Speeding the Flow

The expedited process allows for industry-leading turn times of 33 minutes for the pickup or delivery of a single container, and 53 minutes for the delivery of one box and the pickup of a second container. Savannah’s streamlined process means lower emissions from idling trucks.

The GPA is in the process of adding another eight truck lanes at the Port of Savannah.

The Port of Savannah’s ample capacity to handle the influx of trade from today’s larger vessels ensures the free flow of cargo on and off terminal. Better connections by road and rail mean that cargo moves to important inland markets without delay.

Savannah is North America’s most connected container port, according to the Drewry Maritime Advisers port connectivity index, which is based on the number of direct shipping services, and the number of world regions those services connect to. Drewry’s research shows that Savannah’s weekly vessel calls provide superior service to Europe, Asia, and other global destinations.

Already the nation’s largest autoport, Colonel’s Island Terminal started 2016 with 60,000 spaces for automobile processing. In fiscal 2017, the GPA added 30,000 spaces to stay ahead of customer demand. Auto processors Wallenius Wilhelmsen Logistics, Mercedes, and International Auto Processors have grown their operations by 200 acres on the island’s south side, bringing total auto processing space to 547 acres.

In addition to the land recently developed, GPA’s long-term plan is to add 60,000 vehicle spaces on Colonel’s Island. A full build-out of 150,000 spaces will more than double the



**Atlanta Bonded Warehouse’s main metro Atlanta campus in historic Kennesaw is convenient to major interstate highways and is rail-served by CSX.**

terminal’s 2016 footprint, and bring annual throughput capacity to 1.4 million units of cars and heavy machinery.

Immediate access to I-95 means key cities and manufacturing points throughout the eastern United States may be reached within a one- to two-day drive from Brunswick. Additionally, the port provides Class 1 rail service via both Norfolk Southern Railway and CSX Transportation, linking customers to major population centers.

### Access is Key

If access represents the golden ticket to logistics success, it is important to ask: Access to what? The available routes from here to there to Market Square are vital, but so is the ability to take advantage of them.

“The two most significant advantages for Georgia are location and labor,” says Hal Justice, vice president of sales and operations for Atlanta Bonded Warehouse (ABW), a leading provider of temperature-controlled warehousing and less-than-truckload (LTL) and truckload transportation services in the Southeast.

But even with a highly skilled workforce located in the logistics sweet spot, a third box on the ticket still needs to be checked: the right—and continually updated—resources. Georgia checks that box as well, says Justice.

“The deepening of the fourth-largest

container port in the United States with the most western orientation compared to other East Coast ports gives Georgia faster transport times to other markets in the Southeast, Southwest, and Midwest,” he says. “The continued improvement of the interstate system and other state-designated corridors facilitate the movement of freight originating not only at the port but all over the state.”

Still, Georgia is hardly resting on its laurels. “In the past two years, we have seen an increase in manufacturing and processing in Georgia, both in consumer goods and other manufactured or assembled products,” Justice says. “This increase is due not only to the growth in demand within Georgia but also because it is becoming more cost-effective to serve the larger growing Southeastern markets from Georgia.

“There is no doubt labor supply has tightened, but, in talking to colleagues in the 3PL industry across the country, we are still on the positive end of a tightening market,” he adds.

ABW constantly works to leverage those assets. “We continue to grow our distribution programs to deliver ambient and temperature-controlled products originating locally, nationally, and internationally via Savannah into the Southeast, Southwest, and Midwest via our LTL consolidation programs,” Justice says.





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**Whether relocating a frozen food shipment from a damaged warehouse or moving large equipment, no job is too big or too small for the dedicated team at Syfan Logistics.**

“As a result of transportation supply tightening, we also see more volume taking advantage of crossdock and pool consolidation,” he adds. “Trucks moving freight originating in the upper Midwest or the East Coast destined to Southeast and Southwest markets that used to ‘drive through’ metro Atlanta to their final destinations are now dropping consolidated LTL orders on our docks for final-leg distribution. This has become more cost effective than the multi-drop trucks that could take three to five days to make the final drop.

“The growth of our program, the higher transportation costs of inefficient multi-stop trucks, and the growing volume of freight originating in Georgia destined for markets back into the Midwest and the East Coast makes this process more cost effective,” Justice says.

#### A Rich History

ABW views its perspective on Georgia and its logistics infrastructure through the lens of its own rich history. The company was organized in 1948 by a Peter Paul candy broker seeking to provide protective warehousing to confectioners. The company operated as Acme Bonded Warehouse until 1981, when it adopted its current name. After two expansions, the “original” Acme facility encompassed 42,500 square feet of refrigerated storage space with a 10-foot clear height.

Back when ABW came into being, no one could have envisioned the challenges and opportunities that would surface through today’s technological advances. While ABW remains steadfast in its commitment to personal service, the company’s leadership is mindful of the tidal wave of change e-commerce is bringing about.

“Many of our customers and other consumer packaged goods (CPG) companies understand they must be in e-commerce, but have not yet figured out how to make the economics of ‘high touch’ and the expense of parcel delivery work for comparatively low revenue items,” Justice says. “There is more to come in technology and automation to make it cost effective for CPG companies to be profitable—not just successful—in e-commerce. It is work we perform today and we have the platform to scale when we are ready and find the right opportunity.

“Metro Atlanta is already a hub for e-commerce. That will grow exponentially in the next five years and ABW will be a part of that growth,” he adds.

It has been said that growth and strength come only through continuous effort and struggle. That attitude, which certainly characterizes Georgia’s logistics industry, resonates throughout the companies that make up the state’s logistics infrastructure. At Syfan Logistics, a

full-scale, asset-based logistics management company based in Gainesville, some 55 miles north of Atlanta on I-85, continuous growth has been a company hallmark from the start.

Syfan Logistics was established in 2011, but can trace its birth to 1984 when Jim Syfan founded Turbo Logistics. He now operates Syfan Logistics with sons Greg and Steve.

The company, which is well recognized for its expertise in delivering deadline-sensitive, perishable food products, is in the process of expanding its headquarters—strategically located to take advantage of Georgia’s major rail and highway systems, as well as the airport in Atlanta and the ports in Savannah and Brunswick.

In addition, the company is investing in more equipment and expanding its over-the-road fleet of Syfan Transport trucks as part of an increasing effort to better serve its shipper customers. The company works extensively with the nation’s largest foodstuffs companies in the poultry, seafood, confectionery, cereal, and soft drink industries.

#### Meeting the Demand

The company also serves the largest package-delivery companies in the world, along with all expedited divisions of America’s major automotive manufacturers. With a professional staff of 150, Syfan Logistics meets the most demanding shipping needs for temperature-controlled, dry or flatbed loads with on-time pickup and delivery throughout the continental United States, Mexico, and Canada. UPS recognized Syfan Logistics as one of its top partners during the past two consecutive Christmas seasons.

“Syfan’s professionals are available 24/7 to meet our customers’ needs,” says Greg Syfan, company president. “There is no after-hours answering service. We started in the poultry industry, where we learned the importance of communication and how to deliver on time.”

Syfan owns its fleet of Syfan Transport trucks, providing shippers

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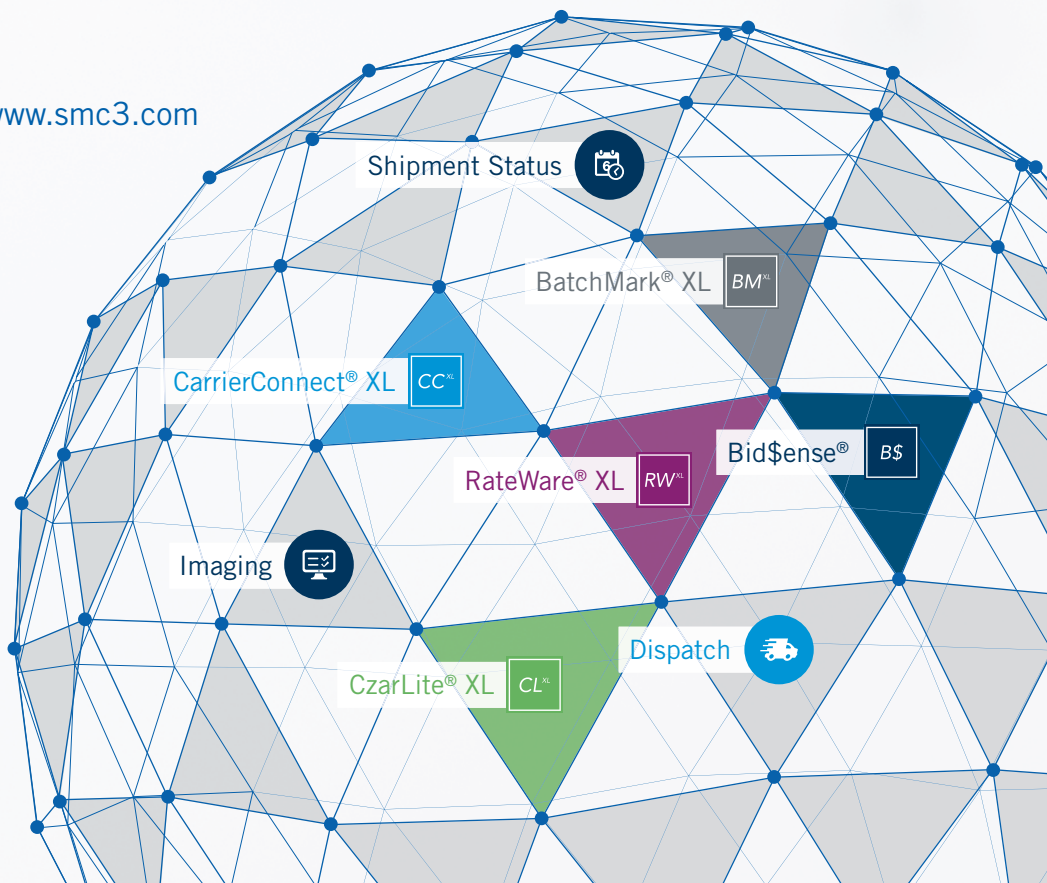
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with an extraordinary degree of flexibility and convenience in equipment options and availability.

Despite its growth, Syfan Logistics remains a family business with a long professional history. Jim Syfan worked in the transportation brokerage industry for nearly a decade before launching the original company with his wife, Gloria, along with Greg and Steve.

As president of one of Georgia's premier logistics firms, Greg Syfan is an unabashed cheerleader for the state's logistics assets. "Georgia has a high volume of available freight moving into and out of the state, which provides opportunities for transportation logistics companies," he says. "Many other states do not offer as much opportunity."

In addition to Georgia's port, rail, and highway advantages, Syfan cites Atlanta's Hartsfield-Jackson International Airport, which provides air service to six continents and nearly

two million square feet of cargo handling space.

With its focus on growth and strength, Syfan Logistics works hard to leverage those assets for its customers. Through its four specialized divisions, Syfan Transport hauls dry, refrigerated, expedited, and dedicated freight.

The company's Freight Management Services (FMS) provides a new pathway to cost savings for its clients. And sophisticated McLeod software and training helps customers trim upwards of 10 percent off their freight costs.

Customers can access Syfan's web portals to track their freight status. All Syfan trucks have GPS, and it can track brokered trucks with MacroPoint technology on the driver's smartphone.

#### Cutting-edge Technology

For all of Georgia's geographical assets and logistics expertise, the importance of staying on top of logistics

technology advances remains of paramount concern. Jeff Lantz, president of C.L. Services, Inc. (CLS), puts the matter simply: Growth in the sector is technology-driven.

"We are developing cutting-edge technology to stay ahead of the curve," says Lantz, adding that CLS continually enhances its technology to share data with shippers both up and down the supply chain.

The Atlanta-based company moves shipments nationally and internationally, and specializes in dry van, flatbed, and temperature-controlled truckload services throughout the United States, Canada, and Mexico. An extensive carrier network augments the company's assets. CLS is an industry leader in providing intermodal and drayage services. Additional services include warehousing and transloading, real-time updates, and shipment tracking.

The company's location near the



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Hartfield-Jackson Atlanta International Airport provides an ideal command post from which its technology is dispatched into the field. “Atlanta is the hub of the South,” Lantz says. “We’re right in the middle of everything.”

**Onward and Onshore**

Coupled with its ideal location, the development of cutting-edge technology at companies such as CLS has moved Georgia to the forefront of onshoring—returning business operations that had moved overseas back to the United States. Lantz has seen these efforts grow throughout the state, and he is proud that CLS plays a major part.

More than half the CLS staff are certified transportation brokers, completing an extensive Transportation Intermediaries Association certification program that requires a thorough knowledge of brokerage rules, regulations, principles, and procedures.

“Successful logistics execution hinges on proactive communications,” Lantz says. “If a customer needs a spot quote, shipment tracing, or proof of delivery, we can provide an immediate and accurate response. In addition, each of our customers and carriers is provided with their own secure log-on and password.”

Shippers can track their shipments and carriers can see available shipments, upload available equipment, and check payment status. “We continually reinvest in communications and technological enhancements such as EDI and internet services to eliminate outage and down time.” Lantz says, adding that data is available to customers 24/7.

Not surprisingly, technology investments, along with years of transportation experience, have made CLS another gem of the Georgia logistics field. The company opened its doors in 1997, and has thrived by adhering to ethical business practices and offering cost-effective

transportation solutions, Lantz says.

In addition, CLS operates debt-free, which allows it to utilize the finest vendor partners in the industry. “While we understand the need to continually enhance our technology—EDI, web-based services and on-board communications—we never lose sight of the all-important human touch,” he says. “We strongly believe our greatest asset is our people. By taking proper care of our people, our people will take proper care of our customers.

“C. L. Services is customer obligated,” he adds. “We expect to always do the right thing. Integrity is part of the decisions we make in the best interests of our team, customers, and vendors.”

**Moving Forward**

Georgia’s long-established logistics leadership serves as a platform for more growth. Case in point: Burris Logistics, which recently completed construction

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of a 250,000-square-foot public refrigerated warehouse in McDonough, 30 miles outside Atlanta. This new cold-storage facility expands the company's existing East Coast capabilities while offering its partners an even stronger refrigerated warehouse network.

Burris, an industry leader in cold storage solutions with dedicated public refrigerated warehouse facilities spanning the East Coast, has enjoyed a Peach State presence for several years. Its new facility in McDonough is another milestone in a company history that traces back to 1925 when John W. Burris and his father, Edward, worked together to ship tomatoes from the Delmarva Peninsula—a large peninsula on the East Coast occupied by most of Delaware as well as the eastern shores of Maryland and Virginia—into Philadelphia. On the return trip, they carried Acme Markets' bread to its Delmarva region stores.

#### Cold Storage a Hot Spot

Over the years, Burris has branched out into food-service redistribution, public refrigerated warehousing, and custom and retail specialty work.

"We weren't the first company to delve into cold-storage solutions, but our commitment to excellence has made us an industry leader," says Michael T. Pitcher, sales director. "We continue to open state-of-the-art facilities with cutting-edge technology to keep businesses ahead of the competition."

Pitcher is among several of the Delaware-based company's management leaders who will have offices in the new McDonough facility. "We are committed long term to Georgia," says Pitcher. "Atlanta is the East Coast gateway and the McDonough location will increase our presence and import/export capabilities."

Because Burris already had been positioned in Georgia, the new facility was up and running quickly with high-performing team members. While primarily a cold-storage warehouse, McDonough also hosts a freight



Georgia Ports Authority's new Panamax ship-to-shore cranes work the COSCO Development—the largest container ship ever to call on the U.S. East Coast—at the Port of Savannah.

management division. In addition to its direct work, it also serves as a brokerage.

"The coolest part of the new building is the refrigeration system," Pitcher says. The system uses a Freon-blended refrigerant, which translates into a safer environment for products as well as team members. "It's sustainable and eco-friendly," he adds.

While its expanded Georgia presence is new, the Burris tradition in logistics is not. "This is a family company with all the culture and values that go with it," Pitcher says. "The fifth generation is currently in charge." That family culture results in empowered team members. "We give employees the confidence to do what's right," he adds.

"The Burris family's commitment to exceptional customer service goes back five generations," says Donnie Burris, CEO. "Carrying the torch passed by my father, Bob Burris, our company promise of 'integrity delivered' will remain an integral part of everything we do today—and in all the years to come."

The new McDonough facility joins the list of Burris facilities in Elkton and Federalsburg, Maryland; Haines City, Orlando, Jacksonville and Lakeland, Florida; Harrington, New Castle, and Milford, Delaware; Rocky Hill, Connecticut; Lyndhurst, Virginia; Philadelphia; and Springfield, Massachusetts. Through this network,

the company hits a home run in logistics services—custom retail distribution, cold storage, food service redistribution, and freight management.

#### Technology Central

The litany of Georgia's logistics assets is so extensive that sometimes its technology advantages are not readily top of mind. "In Georgia logistics, what's sometimes overlooked is how much supply chain technology is based in Atlanta and the surrounding area," says Andrew Slusher, CEO and president of SMC<sup>3</sup>, an information provider for leading technology and manufacturing powerhouses around the country and beyond. Its client list includes Oracle, MercuryGate and McLeod Software, and SAP. In addition to its headquarters in the Atlanta suburb of Peachtree City, the company maintains an office in Louisville, Kentucky.

From the broad perspective SMC<sup>3</sup> provides, Atlanta is technology central in the supply chain landscape. "The city's Technology Square is the region's technology and innovation nucleus, and new technology companies always pop up in the greater metro area, striving to create new efficiencies in myriad industries," Slusher notes. "We're based in Atlanta because this enormous technology base attracts the best IT and development talent around."

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Atlanta's proximity to the Port of Savannah ensures the city remains a major waypoint as international shipments head out across the country. "Additionally, the sheer volume of air freight Atlanta's Hartsfield-Jackson International Airport handles each year speaks for itself," Slusher says. "In fact, air cargo continues to grow in Atlanta, so the airport will only become more valuable for logistics in Georgia."

All this adds up to enormous benefits for SMC<sup>3</sup>. "We provide full visibility for LTL shipments from rating to dispatch to delivery," Slusher says. "Positioning ourselves in the midst of so much technology talent is a major benefit."

Using a blend of analytical and transactional APIs (application programming interfaces), SMC<sup>3</sup> strives to solve the entire LTL shipment lifecycle. The company's solutions take shippers and 3PLs from transportation procurement, pricing, and transit-time analysis, all the way to shipment execution, visibility, and audit.

### Creating Solutions

Georgia logistics companies of every size use SMC<sup>3</sup> tools to optimize their supply chains. While the volume of supply chain activity in Georgia—and the area's capacity for more activity—is encouraging, it also creates challenges.

"Congestion on the infrastructure in and around Atlanta can be frustrating to the supply chain community, and we can't ignore the environmental impact our industry leaves behind with every shipment," Slusher explains. "Using our solutions, carriers save on fuel and labor costs, not only putting fewer trucks on the road but also making sure that deliveries are optimized for the best possible routing. As a progressive technology company, we take pride in knowing that companies use our tools to help create a greener supply chain."

SMC<sup>3</sup> focuses on creating value-added solutions for shippers, carriers, 3PLs, and other logistics stakeholders operating in the LTL arena. "As the Georgia logistics marketplace evolves,

“We are based in Atlanta because the state’s enormous technology base attracts the best IT and development talent around.”

Andrew Slusher,  
CEO and president, SMC<sup>3</sup>

and supply chain disruptors come and go, we're evolving in parallel, providing solutions to achieve the results our customers and their end consumers demand," Slusher says. "We pride ourselves on delivering the right information at the right time so our clients, and the industry, can make the right decisions."

In 2017, SMC<sup>3</sup> brought its trusted third-party CzarLite family of base rates to Mexico, providing reliable LTL rate information for point-to-point service inside the country. The rate benchmark created a level rate playing field for shippers and 3PLs with intra-Mexico supply chain needs, a reliable way to benchmark the pricing data they received from carriers.

In January 2018, SMC<sup>3</sup> acquired intra-Canadian base rates from the Freight Carriers Association of Canada. This extension of SMC<sup>3</sup>'s price benchmarking offers shippers and 3PLs around the globe better insight to manage their intra-Canadian supply chain needs.

"We're also focused on continually improving our direct-to-carrier API services, offering shippers and 3PLs transactional alternatives to our high-powered analytical APIs such as RateWare XL and CarrierConnect XL," Slusher says. "The transactional API economy is continuing to expand, and we offer numerous API solutions to provide customers with visibility, rating, and transit-time options.

"While transactional APIs are incredibly useful and should be a tool in any shipper's array of solutions, they may not always be the best option," Slusher adds. "Shippers and 3PLs that need to rate a high volume of shipments quickly often turn to our analytical APIs for more computing power.

"We provide solutions for all shippers—whether they send 50 shipments weekly or 5,000 shipments daily," he notes.

"We continue to give truckload and LTL carriers complete clarity into their costs at the shipment level via our activity-based costing model," Slusher says. "Carriers use the SMC<sup>3</sup> Transportation Costing Group solutions to maintain cost-effective yield management and analyze their true shipping costs, helping them increase profitability."

### Providing Security

One company that benefits mightily from Georgia's logistics strengths returns the favor by contributing mightily to the logistics sector. Atlanta-based TydenBrooks Security Products Group, established in 1873, produces customizable security seals, tapes, labels, and other security devices.

"TydenBrooks is the oldest and largest security seals manufacturer in the world," says William McKeen, marketing communications manager. "Myriad industries, and most commonly logistics companies, use our seals to secure shipments and provide tamper evidence.

"Every month we produce and ship millions of units," McKeen explains. "Access to three major interstates, Hartsfield-Jackson Airport, and the Port of Savannah allows us to keep our seals moving quickly and efficiently to customers all over the world. Additionally, locating our largest North American production facility and corporate headquarters in the Atlanta area allows us to provide excellent service and rapid delivery to customers such as UPS, Coca-Cola, Delta, and Norfolk Southern."

The company, which maintains manufacturing plants in Tallapoosa, Georgia, and Angola, Indiana, serves



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more than 75 countries and holds 150-plus patents worldwide. TydenBrooks employs more than 250 U.S. workers, and supports and secures U.S. airlines, borders, the chemical industry, defense capabilities, energy production, food supply, railroads, and other vital interests. The company played a key role in World War II efforts to secure communication and shipments, both at home and abroad.

### Best Lead Times, Best Pricing

Georgia provides the ideal foundation for the company's success, McKeen says. "Georgia's business-friendly environment, readily available work force, and recent and continuous infrastructure investments help us provide our seals with the best lead times and pricing in our industry," he notes. "We are proud to secure billions of dollars of cross-border shipments and high-value cargo as our customers meet their security needs."

The company's long tradition as a market leader and logistics service provider has not put it on cruise control. "Over the past few years, we've invested more than \$2.5 million into our Georgia manufacturing processes, specifically for capacity improvements, warehouse expansion, infrastructure upgrades, and personnel," McKeen says. "We have upgraded our integrated real-time logistics software to improve our small package and LTL tracking.

"We also conduct regular conferences

with our domestic and international 3PL to discuss optimizing our carrier selection to maximize customer service levels and reduce costs," he adds.

Likewise, the company's products are expanding. "We continue to build our security solutions portfolio, creating more ISO-certified options such as our new Flex Bolt security seal," he says.

"In addition, we are investing in track and trace innovations," McKeen says. "We plan to introduce products that will allow customers to keep better tabs on their cargo. These recent improvements, along with our continuous research and development, enable us to support logistics in Georgia and around the world."

The Georgia General Assembly recently recognized and commended TydenBrooks on the 145th anniversary of its founding and on its exceptional service to the state and the nation.

### Logistics Footprints

The footprints of logistics are deeply set in the rich Georgia soil. And they are getting more plentiful every day.

Consider, for example, The Shippers Group. Since its founding in 1901, The Shippers Group has grown and evolved to continuously meet the growing demands of the regional, national, and Fortune 100 customer businesses it serves. Headquartered in Dallas, Texas, The Shippers Group has operated in Georgia for more than 20 years.

"Our footprint in Georgia could soon

exceed the square footage that we operate in the Dallas market," says Rob Doyle, company president.

Why the focus on Georgia? "The state is booming," Doyle explains. "Demand for warehouse space has surged in recent months. We've seen a significant increase in demand for our packaging and e-commerce services. We are stepping up every functional area within our company through process improvements, training, and talent acquisition to provide warehousing, packaging, and e-commerce solutions and exceptional service."

### Deep Logistics Expertise

Doyle, who is widely respected for his expertise in everything from operations to business development, joined The Shippers Group in late 2016 and is leading the company to its next phase of growth by leveraging his diverse and high-profile industry experience. A graduate of Georgia State University, Doyle was the 2015-2016 International Warehouse Logistics Association (IWLA) chairman of the board. He served on the IWLA board starting in 2007 and on the executive committee from 2012 to 2016.

With 18 years of logistics experience, Doyle was previously the president of Doyle Distribution, president of Amware Logistics, and vice president of business development for Commercial Warehousing Inc. He began his logistics career after completing six years of service in the U.S. Marine Corps from 1989 to 1995.

Earlier this year, the company added 540,000 square feet of space in a new facility located in Austell, Georgia, convenient to Interstate 20 and I-285 to meet the growing demands of its food/consumer goods and automotive customers for contract packaging, e-commerce, and traditional retail distribution services.

"This brings our total square footage in Georgia to more than one million square feet and 4.5 million square feet in total," Doyle says. In addition to its Georgia locations, The Shippers Group operates facilities in Texas, California, Illinois, and Virginia.

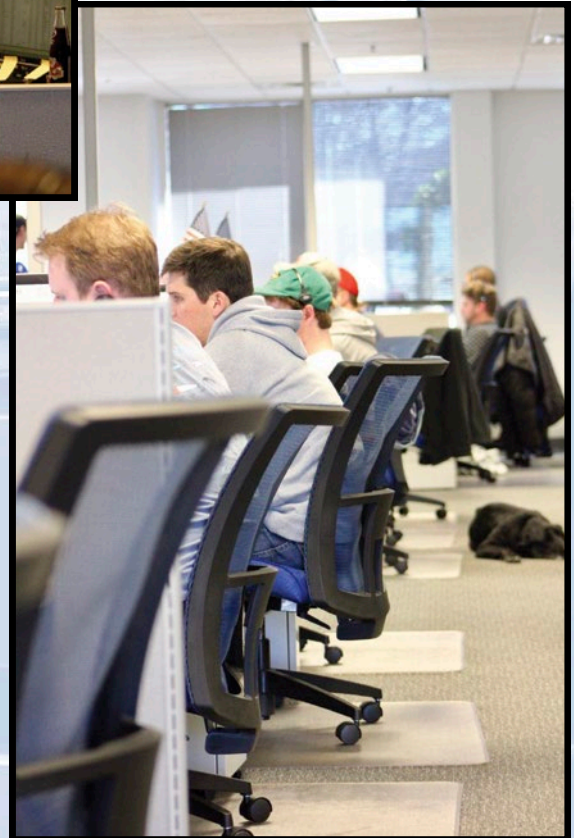


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The company provides an array of logistics services including public and contract warehousing, fulfillment and packaging, transportation management, information management, and 4PL integration.

The Shippers Group receives and services more than 40,000 orders per month, shipping more than four million cases of its products to its customers' customers. The economies of scale and flexibility enable customers to be more competitive in the marketplace.

Not surprisingly, Doyle's leadership in logistics translates to a keen awareness of how important it is to maintain cutting-edge technology. "We are investing in innovative technologies to meet demand for systems integration and automation that improve service performance and operating efficiency, especially within packaging and e-commerce as we grow in that area," he says. "In Atlanta specifically, The Shippers Group is focused on growth, both organic and through acquisition. Our focus on technology, quality processes, and talent acquisition and development is driving The Shippers Group to our next phase of growth."

#### Anywhere, Anytime

On the road to logistics success, you must follow all pathways to progress. Take a wrong turn—or skip one—and you end up at a dead end or in serious danger. Georgia became an international logistics leader by making sure that help is available at every milepost

along the journey—the right people at the right place and time with the right technology, equipment, and knowledge—to maximize efficiency and safety.

That best-of-everything model the state sets is mirrored in its logistics companies. Ben Goldberg, president of JIT Warehousing & Logistics, credits the Georgia Ports Authority for setting the standard. "Georgia's biggest logistical advantage is the GPA and its web of operations throughout the state," he says.

JIT, which operates throughout the United States, handles numerous commodities in addition to steel products and palletized cargo. The company is situated about a half-mile from the GPA's Ocean Terminal and 3.5 miles from the container port.

With more than two decades of import/export experience, JIT provides warehousing, trucking, shipside delivery, port pickup, container drayage, stripping, stuffing, cross-docking, and overdimensional/crane services. The company's overdimensional division includes road escort, rigging, and trailers for heavy haul.

JIT operates facilities on both the CSX and Norfolk Southern rail lines. These facilities are in addition to two other Savannah locations offering more than 750,000 square feet of warehouse space.

The GPA's efforts have resulted in new pathways to progress. "The GPA's expansion to include inland rail ports and deepening of the harbor increase opportunities for Georgia businesses," Goldberg says.

JIT leverages those assets to the best advantage of all concerned. "JIT's four facilities are located in close proximity to both the Garden City and Ocean terminals, allowing efficient cargo movement in and out," Goldberg says. "Over the past year, we have also increased our rail access to include an additional 13-space capacity on Norfolk Southern.

"With the growth of rail service capacity and usage in Georgia, this is the next way to increase options for our customers and add new business to our existing operations," he adds.

#### Ready for Anything and Everything

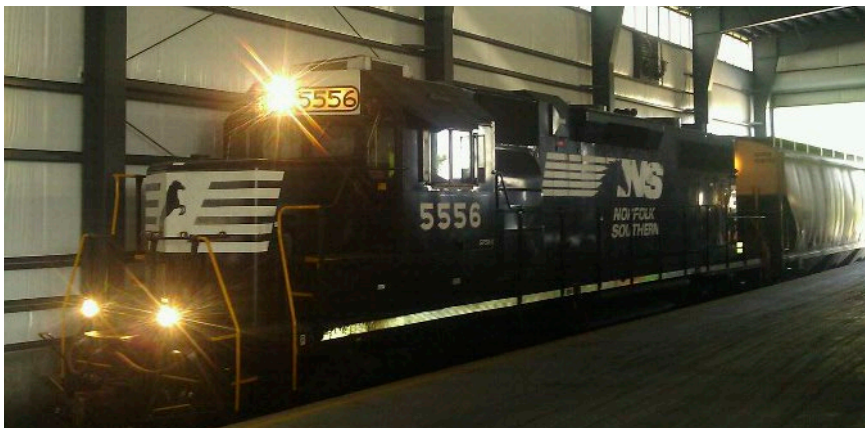
The key is be ready for anything and everything. "One of our biggest advantages is our capability to move many varieties of cargo in a variety of methods," Goldberg says. "We handle metal products, lumber and paper products, palletized, slip sheet, and other commodities. We have capacity for local dray and transload, over-the-road intermodal, rail car loading and unloading, and import/export."

The company's capabilities mirror the state's—prepared to take all manner of products on the road (or in the air or by sea) to anywhere. Likewise, reflecting the state's ambitions and energy in the logistics space, JIT continually builds new and better paths to make the journey smoother and more efficient.

"Given the growing shortage of trucks and limited capabilities due to new ELD regulations, our capacity to offer transloading and rail services allows customers other options for cargo traditionally moved over the road," Goldberg says. "We also are looking to expand our export volume to leverage the new rail spots."

Goldberg believes that JIT's location, historical success, and ever-expanding expertise provide the company with endless opportunities for growth in import and export cargo handling.

In fact, any company seeking new pathways to progress can end their search in Georgia. ■



JIT Warehousing's indoor rail siding means cargo can be loaded or unloaded even in bad weather.

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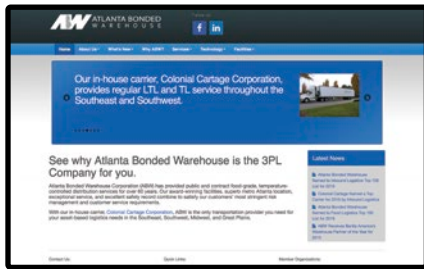


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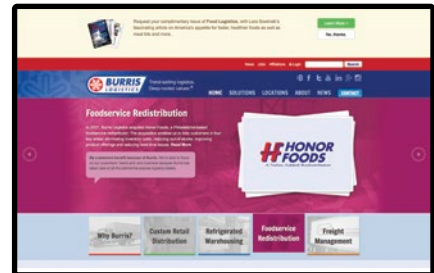


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Atlanta Bonded Warehouse (ABW) has been providing public and contract food-grade, temperature controlled distribution services for over 69 years. ABW is a leader in providing integrated asset-based logistics solutions for the food, pharmaceutical, household durables, and CPG industries. Our goal is total customer satisfaction through continuous innovation in technology and in best practices by focusing on teamwork, integrity, and accountability, all in a safe working environment.

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Burris Logistics offers a broad range of supply chain and related transportation services that can help you achieve significant benefits, including improved delivery performance, inventory reduction, and lower supply chain costs. The Burris Logistics supply chain team has both the functional and industry experience to provide an in-depth, customized approach with practical, executable results. Burris Logistics doesn't just offer up a strategy; it will help you coordinate and implement solutions.

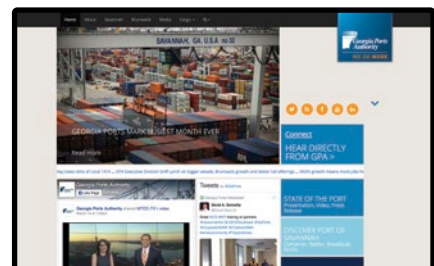


**C.L. Services, Inc. • [www.prosponsivelogisticsgroup.com](http://www.prosponsivelogisticsgroup.com)**

Dependability, accuracy, knowledgeable staff, and raving customer service are the hallmarks of C.L. Services, Inc. CLS moves shipments both nationally and internationally, and specializes in providing dry and temperature-controlled truckload service throughout the United States and Canada. With year-round rate contracts, and flexible spot-pricing, C.L. Services knows how to get the job done.

**Georgia Ports Authority • [www.gaports.com](http://www.gaports.com)**

The Georgia Ports Authority (GPA) includes the Port of Savannah, the Port of Brunswick, the Bainbridge Inland Barge Terminal, and the Columbus Inland Barge Terminal. Learn how Georgia Ports Authority achieves record volume with zero congestion, while keeping an eye on progress and investment, by visiting the website.

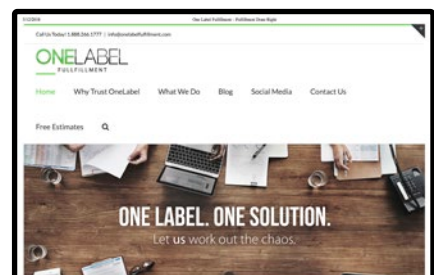


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JIT Warehousing and Logistics specializes in handling steel products and palletized cargo. Our Savannah, Ga., warehouse facilities consist of more than 100,000 square feet of covered storage, and an additional five acres of outside storage. We are located only a half-mile from the GPA Ocean Terminal, and offer crane service and direct discharge from the Port of Savannah. With more than 21 years of import/export experience, we offer warehousing, trucking, shipside delivery, port pickup, container draying, stripping, stuffing, crossdock, and a double drop trailer for your over-dimensional freight.

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Not every company has the knowledge or infrastructure required to address its logistics needs efficiently. Their focus, and rightfully so, is on the products and/or services they provide. That's where RBW, a leader in the 3PL industry, comes in. By taking on warehousing, distribution, and supply chain management issues, we allow our partners the freedom to stop sweating the small—or significant—stuff, and focus on the business at hand. Let RBW look at your operation, and help develop and execute a 3PL plan that will work for you.

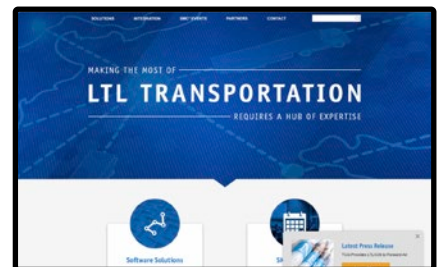


**The Shippers Group • www.shipperswarehouse.com**

The Shippers Group is a well-established regional provider offering public and contract warehousing, fulfillment and packaging, transportation management, information management, and 4PL integration services. All its facilities are food grade, and consistently rated excellent and superior by AIB. Let The Shippers Group help you match your requirements to the appropriate location, whether it be a new facility, an existing facility, or additional space that can be leased in the area. Details are available on the website.

**SMC<sup>3</sup> • www.smc3.com**

SMC<sup>3</sup> is the foremost provider of data, technology, and education as an integrated solution to the freight transportation community. SMC<sup>3</sup>'s core competency is its pricing expertise, which it delivers through products and services that simplify processes and promote collaboration between buyers and sellers of transportation services. The company serves more than 5,000 customers operating throughout the contiguous United States, Canada, and Mexico. SMC<sup>3</sup>'s customer base includes shippers, carriers, logistics service providers, and freight payment companies.



**Syfan Logistics • www.syfanlogistics.com**

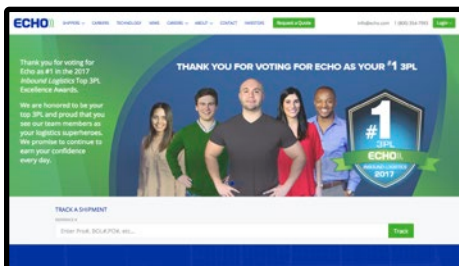
Since 1984, Syfan has provided customers with a competitive advantage through superior transportation and logistics services. Syfan consistently strives to meet and exceed customer expectations of service through timely communication and quality information. Leveraging its rich experience and dedicated team, Syfan's commitment is to provide you with on-time pickup and delivery—every time

**TydenBrooks • www.tydenbrooks.com**

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## 3PL



### Echo Global Logistics • [www.echo.com](http://www.echo.com)

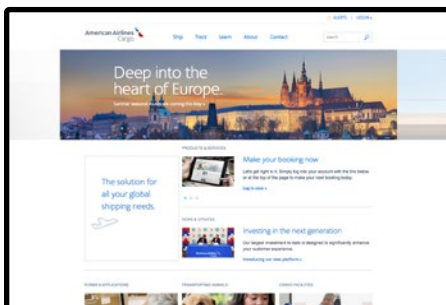
Echo Global Logistics, Inc. (Nasdaq: ECHO) is a provider of technology-enabled transportation and supply chain management services. Echo maintains a proprietary, Web-based technology platform that compiles and analyzes data from its network of more than 30,000 transportation providers to serve its clients' needs. Offering freight brokerage and managed transportation services across all major modes, Echo works to simplify the critical tasks involved in transportation management.

### Lynden • [www.lynden.com](http://www.lynden.com)

Over land, on the water, in the air—or in any combination—Lynden has been helping customers solve transportation problems for almost a century. Operating in such challenging areas as Alaska, Western Canada and Russia, as well as other areas around the globe, Lynden has built a reputation of superior service to diverse industries.



## AIR CARGO



### American Airlines Cargo • [www.aacargo.com](http://www.aacargo.com)

American Airlines Cargo is your shipping solution, providing more than 100 million pounds of weekly cargo lift to major cities in the United States, Europe, Canada, Mexico, the Caribbean, Latin America and Asia. For almost 80 years, American Airlines Cargo has consistently pushed the edge of cargo technology and expanded its network around the world. American Airlines Cargo locations are worldwide; visit the website to search for one near you.

## E-COMMERCE

### FW Warehousing • [www.FWLogistics.com](http://www.FWLogistics.com)

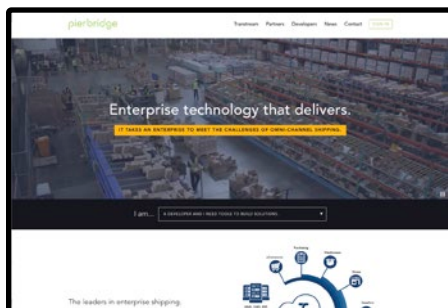
FW Logistics is one of the top 30 full-service 3PLs in the nation. From 1969 to now, we have focused on expanding, so we can be flexible for our growing clients. We have more warehouse space when you need it, provide technology that you deserve, and flex up in staff when you need people the most. We're here when you need a partner in logistics.





**IN THIS SECTION:**

**E-Commerce - Global Logistics**

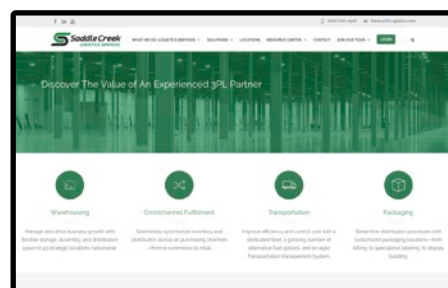


**Pierbridge • www.pierbridge.com**

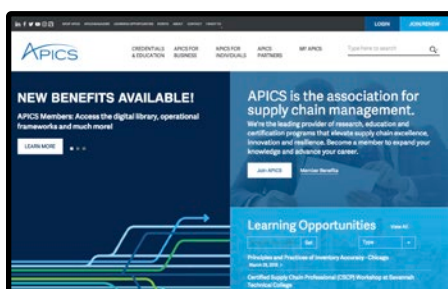
Thousands of retailers, manufacturers, and distributors trust Pierbridge's award-winning TMS software, Transtream, to automate parcel and freight rating, cartoning, shipping, cross-border compliance, tracking, and returns across their enterprise. Deployed on-premise or in the cloud, Transtream can be accessed by any PC, Mac, or mobile device. Transtream's Composer tool connects to local data sources and adapts workflows to role-specific processes. Transtream solutions have earned the highest certification from FedEx, UPS, and USPS.

**Saddle Creek Logistics Services • www.sclogistics.com**

Saddle Creek is an omnichannel supply chain solutions company providing a variety of integrated services, including warehousing, omnichannel fulfillment, transportation and packaging. We leverage these capabilities, advanced technology and our nationwide network to customize scalable solutions that help retailers, manufacturers and e-commerce companies support their business goals. For more information, visit [www.sclogistics.com](http://www.sclogistics.com).



**EDUCATION**



**APICS • www.apics.org**

Supply chain management never stops advancing—and neither should supply chain professionals or their organizations. APICS helps develop supply chain talent and elevate end-to-end supply chain performance. From education and certification to benchmarking and best practices, APICS sets the industry standard. Together with its members, partners and customers, APICS is united in its commitment to global supply chain excellence, innovation and resilience—achieved one person and one supply chain at a time.

**GLOBAL LOGISTICS**

**COSCO • www.cosco-usa.com**

China Ocean Shipping (Group) Company (COSCO), the national flag carrier of the People's Republic of China, is one of the world's premier full-service intermodal carriers. The company utilizes a vast network of ocean vessels, barges, railroads, and motor carriers to link the international shipper with the consignee. COSCON's 20 main-line services connect over 100 ports worldwide to reach more direct ports of call than any other carrier in the world, with weekly, fixed-day service to many destinations. The AUM-Pendulum Service's direct ports of call include Tokyo, Qingdao, Shanghai, Yantian, Hong Kong, Charleston, Norfolk, New York, Boston, Valencia, Naples, Genoa, and Barcelona.





**Crane Worldwide Logistics • www.trycraneww.com**

Crane Worldwide Logistics is a leader in supply chain solutions with more than 100 locations across 25 countries. With expertise in trade compliance, Free Trade Zones, and strategic consultative services, Crane Worldwide continues to develop creative, innovative solutions to improve clients' supply chain outcomes. Sharing industry expertise as a client advocate, the organization develops robust collaboration in the long-term, providing cost-effective and efficient operations. For more information about Crane Worldwide Logistics, please visit [www.trycraneww.com](http://www.trycraneww.com)

**CT Logistics • www.ctlogistics.com**

Since 1923, organizations have leveraged CT Logistics to provide global freight audit & payment and transportation management solutions. Partner with CT to design and implement customized supply chain and rate management solutions. CT's Business Intelligence platform provides global spend visibility and data analysis using SOCII and ISO 9001:2008 certified processes. Services also include: Shipment Execution, Bid Management, Shipment Planning and Execution Software, and Professional Services for consulting and advising.



**MD Logistics • www.mdlogistics.com**

MD Logistics is a third-party logistics (3PL) company specializing in customized supply chain solutions. Our vertical markets include life sciences and pharmaceuticals, retail and consumer goods, as well as transportation services. In addition to cold chain storage and foreign trade zone warehousing, our services range from packaging, omni-channel fulfillment and distribution, to global supply chain solutions, freight forwarding and freight management.

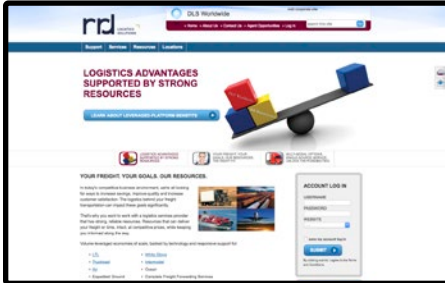
**nVision Global • www.nvisionglobal.com**

nVision Global is a leading international freight audit, payment, and logistics management solutions provider. With locations in North America, Europe, and Asia, our staff is fluent in more than 25 languages, and processes and pays freight invoices from more than 190 countries worldwide. Over the years, our customers have come to rely on our prompt, accurate Sarbanes-Oxley-compliant freight payment services, as well as our leading-edge information management analytical tools including global mapping, graphing, benchmarking, modeling, and network optimization analysis to help them manage their overall supply chain costs.



**IN THIS SECTION:**

**Global Logistics**

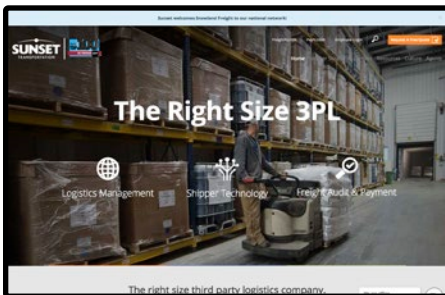
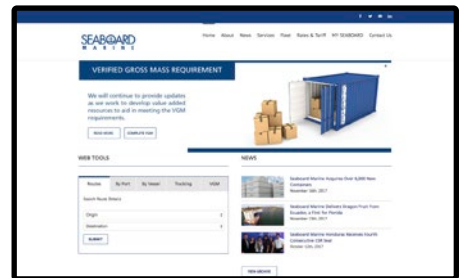


**RR Donnelley/DLS Worldwide • [dlsworldwide.rrd.com](http://dlsworldwide.rrd.com)**

Experience the benefits that only come from working with a major, global shipper that is also a top-ranked 3PL. We offer multiple transportation modes, an established multi-carrier network, volume-leveraged rates and service levels, along with technology-enabled systems and processes. Visit our website and contact us today to see why customers have relied on us for nearly 150 years.

**Seaboard Marine • [www.seaboardmarine.com](http://www.seaboardmarine.com)**

Seaboard Marine is an ocean transportation company that, for more than 29 years has provided direct, regular service between the United States and the Caribbean Basin, and Central and South America.



**Sunset Transportation • [www.sunsettrans.com](http://www.sunsettrans.com)**

Through our diversity of services and technology to our transparent and customer-focused culture, Sunset Transportation is positioned as a dominant logistics management partner for mid-market and large businesses. Sunset's flexibility and entrepreneurial spirit makes us The Right Size 3PL for your growing business—large enough to provide professional, multi-modal solutions while remaining agile and committed to our roots with personalized service.

**TransGroup Global Logistics • [www.transgroup.com](http://www.transgroup.com)**

[www.transgroup.com](http://www.transgroup.com) provides comprehensive information about TransGroup Global Logistics, including locations, services, and global transportation and logistics capabilities. Detailed information about TransGroup's web-based logistics management tools is also provided, as well as customer log-in access and links to resources useful to shippers. To learn about TransGroup Global Logistics, visit [www.transgroup.com](http://www.transgroup.com), or contact TransGroup at 800-444-0294, or by e-mail at [info@transgroup.com](mailto:info@transgroup.com).



## GLOBAL TRADE



### CT Logistics • [www.ctlogistics.com](http://www.ctlogistics.com)

Since 1923, organizations have leveraged CT Logistics to provide global freight audit & payment and transportation management solutions. Partner with CT to design and implement customized supply chain and rate management solutions. CT's Business Intelligence platform provides global spend visibility and data analysis using SOCII and ISO 9001:2008 certified processes. Services also include: Shipment Execution, Bid Management, Shipment Planning and Execution Software, and Professional Services for consulting and advising.

### Hub Group • [www.hubgroup.com](http://www.hubgroup.com)

Hub's extensive service network—built over many years—enables it to provide innovative transportation solutions that are versatile, flexible, and designed to deliver maximum efficiency. With this advantage, Hub Group is able to collaborate with customers daily to help them meet their transportation challenges. With intermodal, highway, and logistics transportation offerings, the Hub Network is your single source—coast to coast, border to border. Visit the website to learn what Hub can do for you.

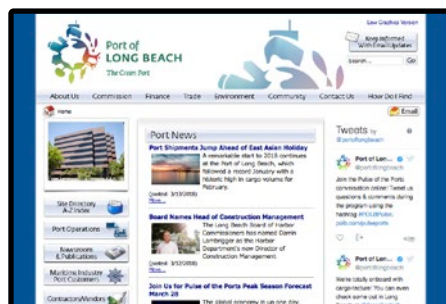


### MD Logistics • [www.mdlogistics.com](http://www.mdlogistics.com)

MD Logistics is a third-party logistics (3PL) company specializing in customized supply chain solutions. Our vertical markets include life sciences and pharmaceuticals, retail and consumer goods, as well as transportation services. In addition to cold chain storage and foreign trade zone warehousing, our services range from packaging, omni-channel fulfillment and distribution, to global supply chain solutions, freight forwarding and freight management.

### Port of Long Beach • [www.polb.com](http://www.polb.com)

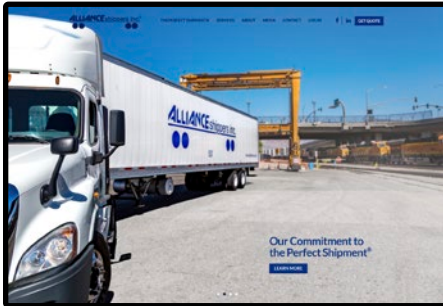
The Port of Long Beach is one of the world's busiest seaports, a leading gateway for trade between the United States and Asia. During the next 10 to 15 years, the Port of Long Beach plans to create at least four container terminals of more than 300 acres each, and to build at least one other large terminal. The new terminals will have dockside rail facilities, which allow cargo to be transferred directly between ships and trains. Such transfers speed deliveries between Long Beach and markets nationwide. For more information on the advantages and services offered by the Port of Long Beach, visit [www.polb.com](http://www.polb.com).



**IN THIS SECTION:**

**Intermodal - Rail**

**INTERMODAL**



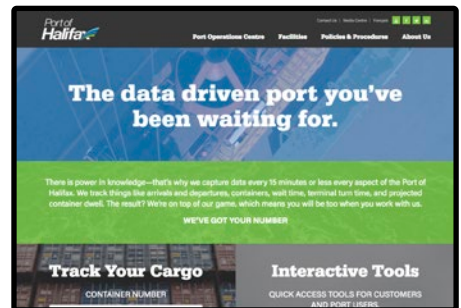
**Alliance Shippers • www.alliance.com**

Delivering The Perfect Shipment® from pick up to destination. With operating facilities in the United States, Canada and Mexico, Alliance Shippers Inc. combines excellent customer care with state-of-the-art rail, highway, ocean and air transportation solutions. Additional services include warehousing, distribution, customs clearance, equipment/driver leasing and expedited transportation. For cost-effective logistic solutions tailored to your company's exact needs, contact Alliance Shippers Inc.

**PORTS**

**Halifax Port Authority • www.portofhalifax.ca**

Halifax is perfectly positioned to provide international shippers with rapid access to the eastern and central markets of Canada and the United States. It is one of the few ports on the East Coast of North America capable of handling fully laden post-Panamax vessels. Halifax is a multi-purpose port capable of handling every configuration of cargo, including container, ro/ro, bulk, breakbulk, and special project, heavy lift. The diversity of the port is accommodated through our two container terminals, an automobile handling facility, and two common-user multi-purpose facilities.



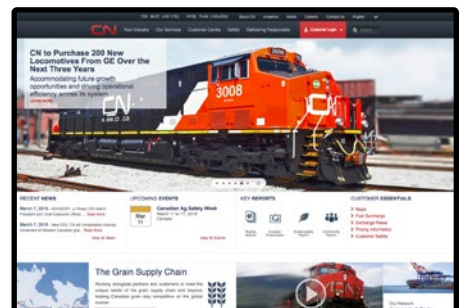
**Jacksonville Port Authority • www.jaxport.com**

JAXPORT is a top U.S. vehicle handling port, the No. 1 container port complex in Florida, and home to one of the nation's highest weight-bearing capacity docks. The port offers worldwide cargo service from dozens of ocean carriers with service to more than 100 ports in 70 plus countries around the world. Located in Northeast Florida, in the heart of the South Atlantic, JAXPORT is a full service, international trade seaport situated at the crossroads of the nation's rail and highway network with access to more than 60 million consumers within a one-day truck drive. JAXPORT offers award-winning customer service. JAXPORT. It's Just Smart Business.

**RAIL**

**CN • www.cn.ca**

CN's network of logistics parks are strategically located at the heart of North America to connect your business to world markets. Located in, or adjacent to, its intermodal rail yards, CN provides you with seamless and efficient transportation and easy access to major highways. CN provides access to all key logistics services—rail, intermodal, warehousing, distribution, CargoFlo liquid and dry bulk transload, and Autoport distribution facilities—in one location. As your supply chain partner, CN can help you find your new distribution home.



# WhitePaperDigest

Industry experts amass supply chain management best practices and skill sets, and invest in new research and evaluation tools. Now you can benefit. *Inbound Logistics* has selected this collection of whitepapers that will give you a jump on important supply chain issues. For more information on any of these whitepapers, visit the Web sites listed below.

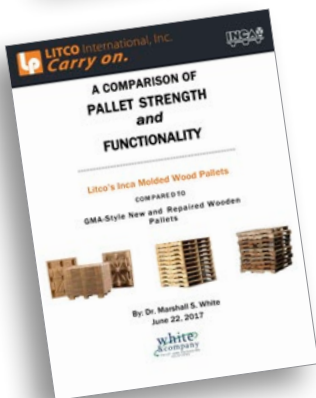


## Pierbridge

**TITLE:** *It Takes an Enterprise to Control Parcel Spending*

**DOWNLOAD:** <http://bit.ly/Pierbridge>

**SUMMARY:** Fast and free shipping is the new normal in e-commerce, and Amazon continues to set the pace. How can you keep up? Find the answers in Pierbridge's free e-book. Download it today to learn how parcel TMS software can help your business control costs by improving parcel planning with an enterprise software approach, shipping with total control, utilizing advanced analytics to normalize and store information to gain a complete picture of transportation activity, and more.



## Litco International

**TITLE:** *A Comparison of Pallet Strength and Functionality*

**DOWNLOAD:** <http://bit.ly/LitcoWhitepaper>

**SUMMARY:** This whitepaper discusses the functionality characteristics of two wood-based pallet types made from distinctive processes. The pallets compared for use in one-way shipping include the innovative 48-inch x 40-inch Engineered Molded Wood pallet made with high heat and pressure and the established 48-inch x 40-inch GMA-Style pallet made from wood slats and nails. Learn how pallet strength, stiffness, and other functionality characteristics impact supply chain efficiencies.

## ShipStation

**TITLE:** *Brand Your Shipping: How to Overcome the Brand Dead Zone*

**DOWNLOAD:** <http://bit.ly/ShipStationBook>

**SUMMARY:** ShipStation's free e-book offers ways for online sellers to strengthen the brand-customer relationship and create a memorable post-purchase experience. Available in an easy-to-read format with quick tips, real-life examples, and key takeaways, topics include branded shipping, shipping at checkout, tracking and delivery, the unboxing experience, packaging, returning on brand, and delivering your brand.



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## Descartes Systems Group

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**TITLE:** *Business Transformed: B2B Communications*

**DOWNLOAD:** <http://bit.ly/DescartesWhitepaper>

**SUMMARY:** Although supply chains operate faster and more effectively than ever, why is it getting harder for businesses to connect? Varying communication requirements, multiple forms of data, and diverse trading partner capabilities add to the challenge. This free whitepaper by ChainLink Research details why it's critical that companies get B2B communication right. With targeted visuals and at-a-glance critical takeaways, the whitepaper covers: Why managing and sharing information should be a C- level decision; the four pillars of B2B communication and why cross-functional communication is a must; today's integration challenges across content, data formats, and the cloud; and how many companies are using technology to better connect.

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## C3 Solutions

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**TITLE:** *Purchasing and Implementing a Yard Management System*

**DOWNLOAD:** <http://bit.ly/C3SolutionsYMS>

**SUMMARY:** You will find everything you need to know about purchasing and implementing a Yard Management System in this practical guide. It aims to help inform the decision to implement a YMS—from investigation to scoping to vendor selection and implementation. The whitepaper covers: who needs a Yard Management System, specific areas where YMS can optimize operations, what to look for when evaluating a YMS, vendor evaluation checklist, ROI considerations, and a blueprint for successful implementation.



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## enVista

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**TITLE:** *Think Like a Big Shipper*

**DOWNLOAD:** <http://bit.ly/enVistaShipperWP>

**SUMMARY:** Many small and mid-sized shippers suffer from the mindset of "not Walmart." This approach assumes that size and sophistication are necessary to achieve meaningful transportation cost savings. However, shippers of all sizes can always develop and implement strategies that have a return on investment. You don't have to be a big shipper to obtain similar savings—simply think and act like one. Read this whitepaper to learn more.

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## Hub Group

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**TITLE:** *The Correlation Between Service And Savings In The Supply Chain*

**DOWNLOAD:** <http://bit.ly/HubGroupWP>

**SUMMARY:** To increase savings, business leaders must concentrate on the total cost of the supply chain, rather than just transportation prices. The right company acts like a business partner and takes into consideration transportation, operations, and inventory costs to help a network operate more efficiently. What is your transportation and logistics provider doing for you? What should they be doing? Download this whitepaper to find out.



### Share your whitepaper with /L readers!

*WhitePaper Digest* is designed to bring readers up-to-date information on all aspects of supply chain management. We're building a database of SCM whitepapers, and you can help. E-mail us with whitepaper recommendations: [editorial@inboundlogistics.com](mailto:editorial@inboundlogistics.com)

# PRODUCT SPOTLIGHT

## SUSTAINABLE PACKAGING



### eco-board™ Corrugated Crate

**Boxes:** These packaging solutions from Ox Box incorporate plastic from recycled water bottles to enable them to withstand exposure to the elements. A single truckload of eco-board crate boxes saves more than 11,000 bottles from going to landfills and can be recycled with other corrugated materials. They are FDA compliant for direct food contact.

### KTM Industries Green Cell

**Foam:** This environmentally friendly packaging material matches the performance of petroleum-based foams while providing shippers with a biodegradable alternative. Made with 100-percent natural, non-GMO U.S.-grown corn, the foam produces 80-percent less greenhouse gas and uses 70-percent less energy to produce overall. It provides better protection from shock and vibration than expanded polystyrene.



### Corruven CorrPack RE:

This fully recyclable fiber-based packaging material developed by Corruven offers compressive strength and nesting properties. The product's laminated construction combines 100-percent recycled fibers and a corrugated shape. It is an alternative to foam-based products and paper honeycomb, taking up to 80-percent less space.

### FoldedPak

#### ExpandOS™:

Made from 100-percent post-industrial waste, these small, lightweight paper pyramids are designed to lock together using all three sides, six corners, and 38 fingers. The network of circular holes on each unit minimizes package weight and enables the paper pyramids to further interlock. Reusable and recyclable, ExpandOS paper pyramids stabilize products in shipping boxes, providing blocking and bracing.



### UFP Technologies Industrial Molded Fiber Packaging:

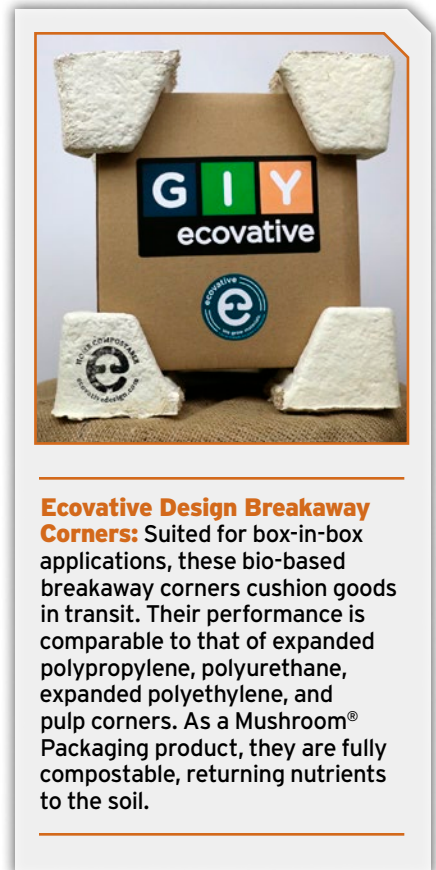
These stackable and nestable molded fiber trays are designed for a variety of lightweight industrial products, reducing shipping costs and protecting

surfaces. The 100-percent recycled and recyclable molded pulp packaging solutions fit plumbing fixtures, faucets, and door hinges.



**Inca Molded  
Hardwood Core  
Protection  
Plugs:**

These 97-percent bio-based plugs from Litco International are designed for shipping rolled products, including paper, plastic, and metallic foils. The Inca core plug's strength advantage comes from the unique process of combining hard and softwood fiber and resin with high heat and pressure. The end result is a dimensionally stable plug with a tight fit that provides crush resistance to goods in transit.



**Ecovative Design Breakaway  
Corners:**

Suited for box-in-box applications, these bio-based breakaway corners cushion goods in transit. Their performance is comparable to that of expanded polypropylene, polyurethane, expanded polyethylene, and pulp corners. As a Mushroom® Packaging product, they are fully compostable, returning nutrients to the soil.



**Geami WrapPak®:** This paper cushioning system, developed by Macfarlane Packaging in partnership with Ranpak, is designed for shipping fragile items. Composed of a tissue lining with a 3D honeycomb outer paper, it allows multiple pieces to be packed into the same box. The company recently launched a new range of colors for this eco-friendly, easily recyclable protective paper packaging solution.

**TempGuard™ Insulated Box Liner:**

Sealed Air's TempGuard solution, recipient of the AmeriStar Award for sustainable packaging, is a curbside recyclable material developed for shipping temperature-sensitive goods. A completely recyclable thermal insulation material, it is created by filling kraft paper with a uniform inner batting made from recycled paper. TempGuard's flexibility allows it to conform to contents, which provides for the use of smaller external cartons, decreasing shipping costs and reducing carbon footprint.





**Southwest Airlines** begins shipping cargo to select international destinations in May 2018. Southwest Airlines Cargo will serve Mexico City, Cancun, Cabo San Lucas/Los Cabos, and Puerto Vallarta with more international destinations planned for 2018. The new international shipping options are made possible by the rollout of Southwest Cargo's new point-of-sale and back office accounting system, *Southwest Cargo Suite*, which lets shippers make advanced cargo bookings and utilize electronic air waybills.

### // Services //

**DHL Global Forwarding**, the air and ocean freight arm of Deutsche Post DHL Group, expanded six U.S. stations along the U.S.-Mexico border to meet the needs of local shippers who require airfreight, ocean freight, customs brokerage, warehouse, and domestic services. DHL Global Forwarding staffs San Diego, Tucson, Nogales, El Paso, Laredo, and McAllen border stations with experts in handling shipments for the military, pharmaceuticals, engineering, manufacturing, and retail sectors.

U.S. Customs and Border Protection (CBP) in **Port Everglades** implemented a new process to allow shippers to submit original vehicle export documentation electronically in lieu of delivering physical copies to the local CBP trade office. The electronic validation program, which is the first of its kind in the United States, is offered in Port Everglades to exporters needing to ship used vehicles from South Florida to destinations throughout the Caribbean, Central America, and beyond.

Temperature-controlled packaging provider **Pelican BioThermal** opened its first service center in southern California. The new facility in San Diego services reusable Credo Cube parcel shippers, including refurbishment and repair. It will also serve as an additional network station for the company's rapidly expanding Credo on Demand rental program, which offers a high-performance, flexible rental option for temperature-controlled pallet shippers, with global reach.



◀ **Lufthansa Cargo** carried out the first commercial transport of a vehicle from Cologne, Germany, to southern Africa on board an Airbus 330 Eurowings passenger aircraft on behalf of specialist logistics company IQS Group. Lufthansa Cargo and its partner Aircargo Consulting developed the process, which includes using a loading simulator to transport larger vehicles in the bellies of Eurowings. Automotive shippers benefit from an expanded network and higher cost efficiency due to the reduced space requirement for loading.

**Delta Cargo** introduced Equation Critical, a new service for international shipments. This premium GPS-enabled service for the transportation of highly time-sensitive shipments that must travel on the next available flight, offers GPS tracking on [deltacargo.com](http://deltacargo.com) and moves with the highest priority across Delta's global network. Shippers can track their shipment, anywhere in the world, in real time.

**Ryder System**, a provider of commercial fleet management, dedicated transportation, and supply chain solutions, opened a logistics facility in Laredo, Texas, to support cross-border shipments between the United States and Mexico. Located less than 5 miles from the World Trade Bridge, the new 109,000-square-foot facility will handle thousands of shipments on behalf of 19 customers within the auto, industrial, retail, and high-tech industries, and provides additional services and capacity opportunities to Ryder's existing and future North American customers.

## //Transportation//

**UPS** launched a daily non-stop flight from its Worldport global air hub in Louisville, Kentucky, to Dubai, UAE, improving time in transit from North and South America to key destinations in the Middle East by one full business day. The flight, operated with one of UPS's new 747-8F freighters, is part of the build out of the company's smart global logistics network and enables greater capacity on its current Europe to Middle East lane.

**OOCL** extended its Mediterranean service network to the Middle East and Indian Subcontinent by launching a Middle East/Pakistan/India-West Mediterranean Service (WM3) in March 2018. The WM3 provides direct linkage between the Middle East, Pakistan, India, Italy, Spain, France, and Egypt. It also provides short transit times to the West Mediterranean, particularly to the Italian market.

▶ **Camelot 3PL Software**, a warehousing software provider, launched *Express WMS*, giving startups and smaller businesses increased efficiency and greater control in managing operations. *Express WMS* is designed to streamline warehouse operations and improve communications, both internally and externally. Standard features such as WebLink View™ provide client-specific web portals for inventory and order visibility.





◀ **SEKO Logistics** opened its second-largest operation in Europe at Amsterdam's Schiphol Logistics Park. The new facility doubles the size of SEKO's previous locations in Amsterdam and brings its entire service offering under one roof for shippers using SEKO's cross-border e-commerce, omnichannel, and international transportation and fulfillment solutions. The Amsterdam operation provides a further distribution channel into Europe for U.S. retailers and increases SEKO's ability to handle fulfillment for multiple wholesale, retail, and e-commerce channels, including reverse logistics and returns.

## //Technology//

**CargoSnap**, a mobile proof-of-condition app, increased functionality for barcode scans, photo and video storage, and document scans. CargoSnap provides real-time visuals of a shipment's bill of lading, export documentation, and physical condition. Shippers can quickly create photos or videos to document a shipment's condition.

**GoShip.com**, an online shipping platform, developed a self-service website designed to connect less-than-truckload (LTL) shippers to carriers. GoShip.com instantly compares rates from thousands of LTL carriers across the country. The online shipping marketplace serves small- to mid-sized businesses and individuals shipping larger-than-parcel items.

**3Gtms**, a transportation management software provider, released 3G-TM transportation management system version 17.2, which offers continuous pool optimization. 3Gtms' latest tools enable users to plan and execute shipments. With continuous pool optimization, shippers can plan shipments to a consolidation point by pre-determining a location or letting the algorithm determine the optimal consolidation facility.



◀ **Honeywell**, a provider of productivity and workflow solutions, introduced the 8680i Smart Wearable, a lightweight scanner that helps improve efficiency and productivity for scan-intensive warehouse tasks. The 8680i reduces worker scanning times by 5 seconds per transaction by eliminating the need for multiple devices. Up to 17 percent lighter than similar products, the device allows for comfortable, all-day use, leaving workers' hands free to handle heavy packages.

//Products//

**Dematic**, a supplier of integrated automated technology, software, and services for the supply chain, unveiled a solution for customers looking to save space and improve product handling. The new Roller Non-Contact Accumulation (RNCA) Decline allows systems to accumulate and decline items on a single conveyor, reducing cycle time. The RNCA Decline combines accumulation, transport, and decline functions, which provides reduced cycle times in smaller spaces, especially urban areas where space is expensive and same-day delivery is expected.

► Robotics and supply chain automation company **GreyOrange** unveiled its expanded range of Butler robots capable of managing payloads from 220 to 3,500 pounds. The goods-to-person Butler system lets warehouses run high-speed operations by automating inventory storage and order fulfillment. It can transport a wide range of loads from raw materials to finished goods, including automotive components, manufacturing material, and liquids on pallets, drums, sacks, crates, and cases.



ADVERTISEMENT  
**PRODUCT SHOWCASE**

# Introducing... "The Exporter"

**A low-cost, strong, internationally accepted pallet designed for export shipments.**

**Here's how Litco's "Exporter" OUTPERFORMS conventional wood, plastic and corrugated pallets for one-way domestic and export shipping!**

- ISPM 15 compliant "as is"; no additional costs to heat treat or fumigate
- Low M.C. of 3% at time of manufacture
- Mold, termite and bacteria resistant
- Sanitized at 350 degrees Fahrenheit in the molding process
- Typically 33% lighter than new hardwood pallets
- "The Exporter" has a 52% greater resistance to pallet edge damage

**The Exporter is twice as stiff as new hardwood pallets! Stiffer pallets are always better because:**

- They are more stable
- They reduce the vibration transmissions and stresses on packaged products
- They help to resist load shifting during transportation.
- They reduce the distribution cost of packaging materials.



Engineered Molded Wood, Export-Grade Pallets  
48"x40" as low as \$7.00 (truckload qty.)

**Download the Whitepaper comparing Litco's Molded Wood Inca Pallets to conventional wooden pallets at [www.litco.com/GMACompareReport](http://www.litco.com/GMACompareReport)**

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# CALENDAR

YOUR LOGISTICS  
DATEBOOK

APR  
29

National Shippers Strategic Transportation Council  
(NASSTRAC)

## Shippers Conference & Transportation Expo

[bit.ly/shippersexpo](http://bit.ly/shippersexpo) | Orlando, Fla. | APR 29 - MAY 1, 2018

**AUDIENCE:** Transportation, logistics, and supply chain professionals

**FOCUS:** Managing and optimizing transportation operations; implications of a customer-driven supply chain; the innovations transforming freight logistics

**MAY 6-9, 2018** Charlotte, N.C.

Warehousing Education and Research Council

## WERC 2018: 41st Annual Conference for Logistics Professionals

[werc.org/2018](http://werc.org/2018)

**AUDIENCE:** Logistics and warehousing professionals

**FOCUS:** Strategies for warehouse slotting and packaging optimization; designing the distribution center of the future; effective warehouse associate recruitment and retention approaches

**MAY 14-17, 2018** Phoenix, Ariz.

Gartner

## Gartner Supply Chain Executive Conference

[gartner.com/events/na/supply-chain](http://gartner.com/events/na/supply-chain)

**AUDIENCE:** Supply chain and logistics executives

**FOCUS:** Embracing the transformative power of agility and responsiveness so supply chains can turn disruption into advantage; innovating, disrupting, and scaling the digital supply chain

**JUN 10-12, 2018** Fort Myers, Fla.

Transportation Marketing & Sales Association

## 2018 TMSA Logistics Marketing & Sales Conference

[tmsatoday.org/annual-conference](http://tmsatoday.org/annual-conference)

**AUDIENCE:** Supply chain stakeholders; sales executives

**FOCUS:** Transportation and supply chain trends; achieving organizational alignment between departments and associates to reduce friction and accelerate an organization's growth

### CONFERENCES

**APR 9-12, 2018** Atlanta, Ga.

MHI

## MODEX 2018

[modexshow.com](http://modexshow.com)

**AUDIENCE:** Manufacturing and supply chain professionals

**FOCUS:** How Industry 4.0 and the Industrial Internet of Things is impacting supply chains; exploring the latest equipment and technology solutions from more than 850 providers; futureproofing your company's supply chain

**APR 9-12, 2018** Atlanta, Ga.

Georgia Center of Innovation for Logistics

## 2018 Georgia Logistics Summit

[georgialogistics.com/summit](http://georgialogistics.com/summit)

**AUDIENCE:** Supply chain and logistics professionals

**FOCUS:** Next-generation analytics for supply chains; top transportation takeaways; assembling logistics success for manufacturing; tackling operational visibility through technology

**APR 18-19, 2018** Atlanta, Ga.

Terrapinn

## Home Delivery World 2018

[bit.ly/homedelivery2018](http://bit.ly/homedelivery2018)

**AUDIENCE:** Retail logistics and supply chain professionals

**FOCUS:** Strategies for optimizing product fulfillment, delivery, and customer satisfaction through supply chain, logistics, warehousing, and transportation operations; trends in delivery operations; building a sustainable logistics network

**APR 30 - MAY 3, 2018** Long Beach,

Calif.

Gladstein, Neandross & Associates (GNA)

## Advanced Clean Transportation Expo

[actexpo.com](http://actexpo.com)

**AUDIENCE:** Transportation, logistics, and supply chain professionals

**FOCUS:** Trends driving transportation technology including connected vehicle systems, efficiency, electrification, alternative fuels, and sustainability; the future of fuel cells

**MAY 4, 2018** Los Angeles, Calif.

Los Angeles Area Chamber of Commerce

## World Trade Week Kickoff Breakfast

[worldtradeweek.com](http://worldtradeweek.com)

**AUDIENCE:** Supply chain stakeholders

**FOCUS:** The evolution of trade in a digital world; importance and benefits of global trade on the local and national economy; insights from GE Transportation chief digital officer and U.S. Customs and Border Protection acting commissioner

**MAY 6-9, 2018** Nashville, Tenn.

Institute for Supply Management

## ISM 2018 Annual Conference

[ism2018.org](http://ism2018.org)

**AUDIENCE:** Supply chain managers

**FOCUS:** Global supply chain challenges; managing complexity to increase competitive advantage; key steps in strategic sourcing; creating value through strategic partnerships; empowering women in supply management

### SEMINARS & WORKSHOPS

**APR 26-27, 2018** Cambridge, Mass.

MIT Sloan Executive Education

## Supply Chain Strategy and Management

[bit.ly/MITsupplychainstrategy](http://bit.ly/MITsupplychainstrategy)

**AUDIENCE:** Logistics and supply chain professionals

**FOCUS:** The next big trend in supply chain strategy, and the key skills required to be successful; how to better structure a company's supply chain strategy



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### SAMPLE OF KEY TOPICS:

- From Transactional to Transformational: Driving innovation, growth & value
- Going Digital: Strategies for accelerating procurement transformation
- Talent of the future: Addressing the changing skill set requirements in procurement
- Analytics in Action: Highlighting data-driven decision-making

### SAMPLE OF DISTINGUISHED SPEAKERS:

- **Steven Nowak**, Vice President, Global Sourcing and Chief Procurement Officer, **Owens Corning**
- **Susan Grelling**, Vice President, Supply Chain Planning and Sourcing, Chief Procurement Officer, **Patterson Companies**
- **Andrea Greco**, Chief Procurement Officer, **CBRE Group**
- **Anu Saxena**, Senior Vice President & Global Head, Hilton Supply Management, **Hilton**



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## Olympics 2018: Supply Chain Gold



### Filling Thousands of Contracts

The Pyeongchang organizing committee began issuing procurement contracts in 2015. Since then, the committee commissioned approximately 8,800 total contracts.

### No Amateur When It Comes to Food

Roughly 7,000 meals were served in Pyeongchang every day, which equates to about 500,000 pounds of raw ingredients every 24 hours. To keep those meals coming, the organizing committee hired 180 chefs. Companies were also contracted specifically to package, store, deliver, and warehouse the food.

### Overcoming Language Barriers

For the 2016 Summer Games in Rio, the event's organizing committee created the Procurement Portal, which served as a central hub for the committee and interested suppliers. Suppliers could register to participate, receive updates, and ensure they were in the loop at all times. While South Korea did provide an e-procurement system, it was available only in Korean, so language barriers required supply chain professionals to coordinate directly.

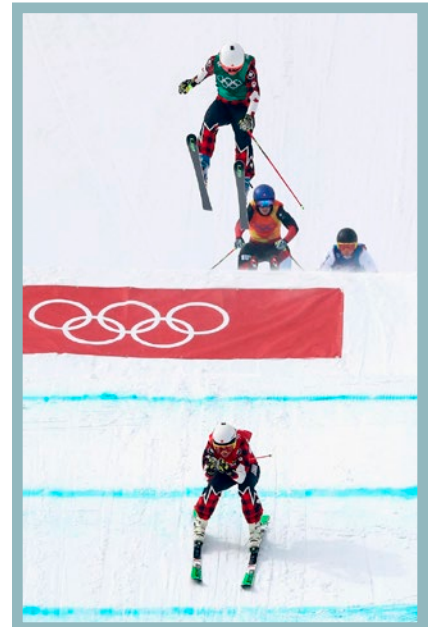
### Sustainability Champion

Like with most supply chains, sustainability is of paramount importance to the Olympics. The Pyeongchang organizing committee set out to exceed the already stringent sustainability guidelines of previous games, and kept tabs on their efforts by tracking key performance indicators such as wind power capacity and emissions.

### Budget Breaking and Still Low-Budget

Dating back to the 2000 Games in Sydney, every Olympics competition has gone over budget—and Pyeongchang was no exception. The organizing committee projected the games would cost about \$7 billion, but latest estimates put the total bill at roughly \$13 billion.

While it's never good to run over budget, the 2018 games came in at a fraction of the cost of the last Winter Games in Sochi, which produced a final bill of \$51 billion. Plus, the Pyeongchang games were the least-expensive competition since the 2006 Turin Winter Games, which ran up a \$4.5-billion tab.



Source: The Logistics of the Pyeongchang Olympics, Thomas blog, [bit.ly/Olympics2018logistics](http://bit.ly/Olympics2018logistics)



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