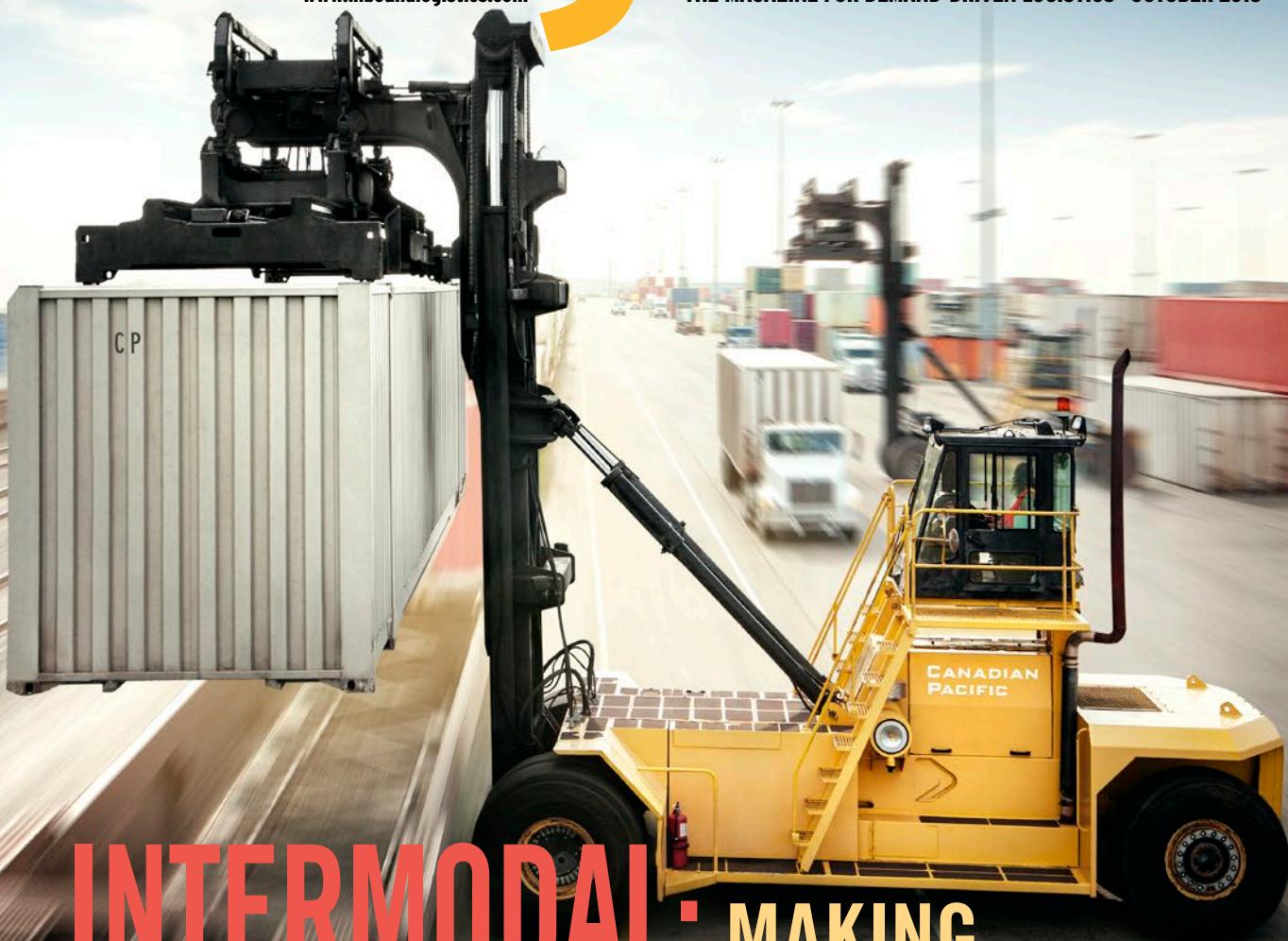


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The ports of **Seattle and Tacoma** have combined their strengths and resources.
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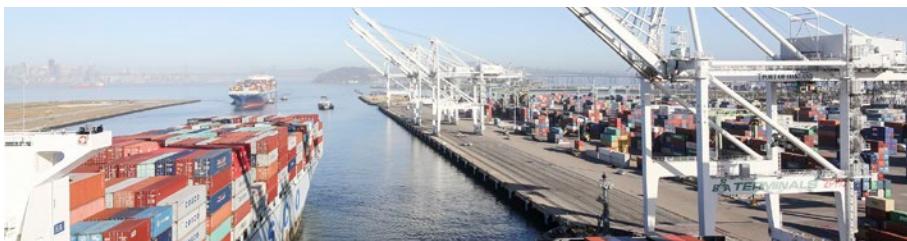
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 The pursuit of perfection may seem an impossible goal. But, with the right combination of key elements, four regions in the United States have achieved logistics greatness.



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ONLINE EXCLUSIVES



Missouri Gets Shipping bit.ly/missourishipping

Steve Johnson, CEO, Missouri Partnership

Missouri is attracting the attention of nationwide shippers looking for a strategic Midwest location. This article discusses what makes the state a great logistics host.



Using Supply Chain Modeling to Mitigate Port Shutdowns and Other Risks bit.ly/scmodeling

Jeff Metersky, Vice President, Customer Success Strategy, LLamasoft

Supply chain continuity planning is critical for global businesses. Here's how shippers armed with an end-to-end digital model of their supply chains can react rapidly and intelligently when unplanned events occur.



When Real Estate Intersects With Logistics bit.ly/logisticsrealestate

Jack Rosenberg, National Director, Logistics and Transportation Group, Colliers International

Leasing new property for a plant or warehouse is an important part of expanding or streamlining logistics operations. These tips will help you negotiate suitable rental prices.

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How to Use Real-Time Ground Conditions

bit.ly/realtimerground

Accurately assessing real-time ground conditions allows dispatch and operations centers to proactively identify problems and adjust routes, thereby improving efficiencies and keeping drivers safe.

How to Prepare for the Food Safety Modernization Act

bit.ly/foodsafetymodact

Even before the final rulemaking of the FDA Food Safety Modernization Act is published and enforced, food shippers should take a proactive approach to make sure supply chains are compliant.



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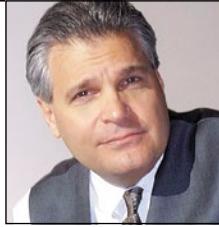
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by Keith Biondo | **Publisher**



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Timely Timeline Reminder

In the past 30 days, I heard and saw much that reminded me why so many *IL* readers tell me they love working in logistics. My travels included 30 site visits and two industry conferences. Here's part of my timeline:

At an early morning meeting, I spoke with one visionary who is forging public-private partnerships to transform a regional hub into a truly global logistics center offering road, rail, air, and sea transport, and logistics solutions and capacity. It should be a model for public-private partnerships elsewhere.

Later that day, I had a spirited (in both senses) discussion on pending government regulations. My conversational combatant was a senior executive at a large trucking company who supported more regulation. My position? Anything discouraging drivers ultimately limits capacity. We both agreed that safety comes first. Unresolved was how small carriers and owner-operators can have a level playing field, and how drivers' independent spirit would react to increasing government control.

The talent gap was the topic of discussion with a vice president of a transport company. His challenge? Forty percent of his workforce will soon retire. Working with local politicians, and reaching down into high schools, will solve part of that, but not all. The gray hair gap in our industry is here, and it is scary.

Speaking of gray hair, one seasoned pro told me how he came back from retirement, and now calls on shippers at Amazon and Google. He says, "Those kids buy differently than we did back then. They may lack practical experience, but they are buying more strategically." Generational, I wondered? "Definitely," he replied.

On generational differences, the wide-eyed wonderment of college kids expressing excitement about a future in supply chain was on display at both logistics conferences. It was also encouraging to see shippers, carriers, and IT companies dedicating time and resources to recruit veterans. I even heard of one company that is recruiting and training military air traffic controllers as train dispatchers.

I saw a practical demonstration of how drones are tracking assets in real time; in this case, power units in a large yard. I was introduced to the phrase "Last 100 Feet," jokingly meant to replace Last Mile.

I met with an industry newcomer who is investing billions to build a global company. His goal is to provide a vast array of solutions that match the future needs of global business. Is his vision of your future logistics needs clearer than most? Read *IL's* interview with him (page 14), then you can make the call.

One logistics luminary described helping Russia craft a tariff system when its economy opened up. He has tapped his next-gen daughter to help his company build next-gen transport technology enabling shippers to solve ever-evolving challenges.

My timeline may not read like a Facebook page, but it was a timely reminder of why so many of us are challenged, yet inspired, by working in logistics. ■



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I was named president of Con-way Western Express in 1985, and spent the next 11 years with some of the greatest people in the trucking industry, building a company and a brand.

The planning of the Con-way business model was guided by the then Consolidated Freightways. CF had owned the Freightliner truck brand since its inception in the 1930s, and in 1981 sold it to Mercedes-Benz. The sale left CF with a huge bundle of cash and one of the first ideas for its use was the Con-way model for regional trucking.

The Con-way brand became one of the great stories in business—nearly \$6 billion in revenue, 30,000 employees, and a Fortune 500 ranking.

In those early days of the business, no one could have imagined the heights the “Con-way Dream” would reach. No one could have ever seen it ending as it did in its purchase and rebranding as XPO.

It’s important to remember the story of its start up. More is going away than just a brand; it’s a history and a case study of business development.

Regardless of what happens next, I’m proud to be part of the team that changed the LTL world.

—George C. Reid, CEO, Reid & Associates



Inbound Logistics

30 SEPT 2015

Here’s how self-driving #trucks will alter the #supplychain. bit.ly/autonomous_trucks

Mark Walus

This is, perhaps, the only economically feasible solution to the driver shortage.

Maryam Hashemi Ahmadi

Interesting. I agree with the pros but how about all the jobs lost? In terms of diversity, we are headed in the direction that everyone would be programming autonomous devices.



Inbound Logistics

29 SEPT 2015

The partial trucking “sweet spot” is between 6 and 18 pallets and/or between 8,000 and 27,500 pounds. bit.ly/teXSamz via @ILMagazine

Ryan Moore @ramlog

@ILMagazine That’s an awfully large “sweet spot” especially when capacity is a factor. Based on data and all factors, we’ve found that value comes with shipments in the 8- to 12-pallet and 7,500- to 15,000-pound range. I’d urge those moving partial loads regionally to use your leverage with regional LTL carriers to tariff partial rates. You’ll find they are more than willing to work with you.

Inbound Logistics

11 SEPT 2015

As #ecommerce transforms consumer behavior, #retailers explore hybrid #omnichannel #supplychain models. bit.ly/1NiwTkj via @ILMagazine

Camelot 3PL Software

@CamelotSoftware

A successful omni-channel strategy is a seamless customer experience, balancing DC and in-store capabilities.



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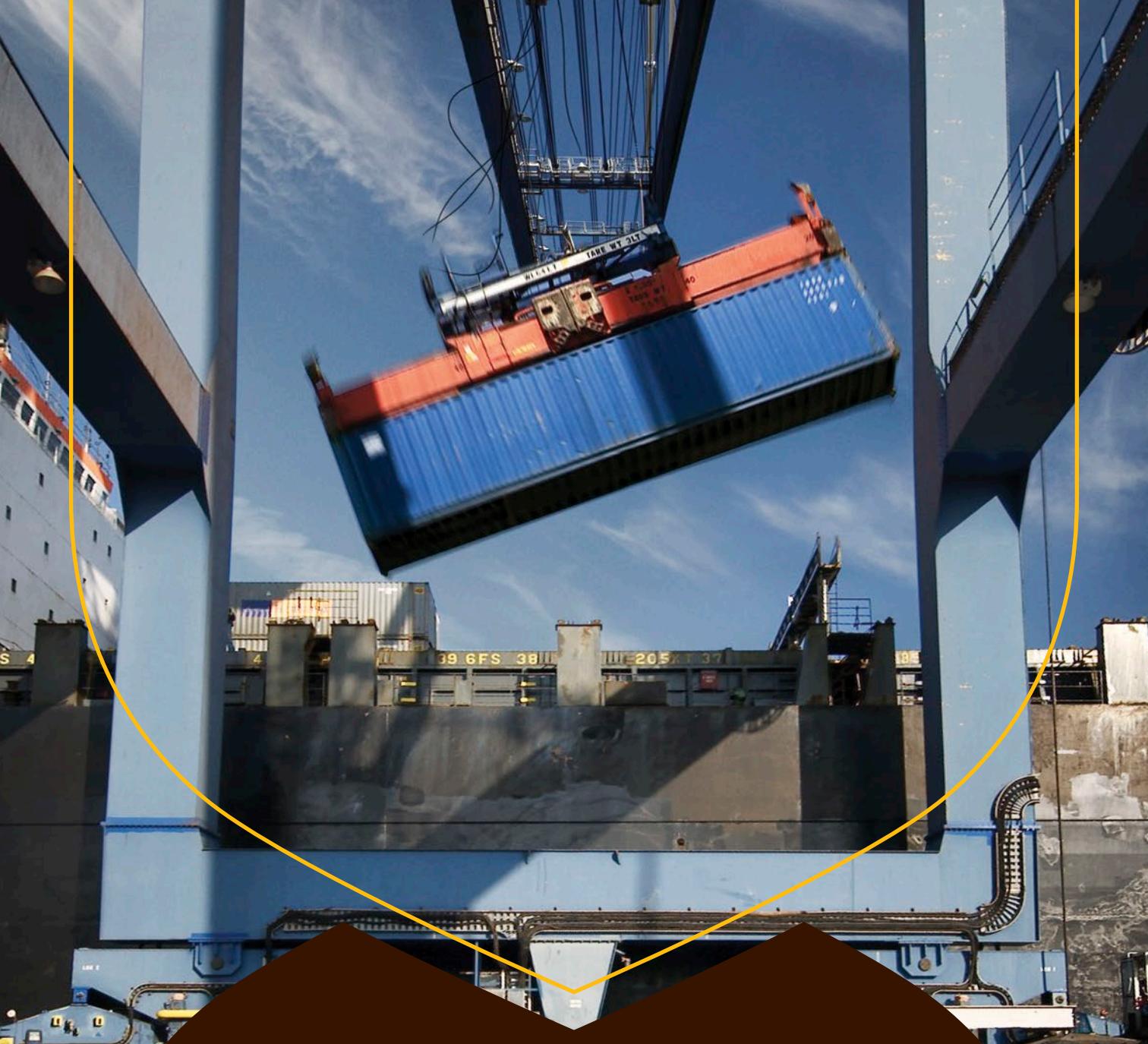
8 Inbound Logistics • October 2015



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*Business Continuity Institute and Zurich Insurance Group, 2014 Supply Chain Resilience Survey

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10 TIPS

STEP-BY-STEP SOLUTIONS



Analyzing Lift Truck Fleet Data

Collecting and analyzing lift truck data is critical to optimizing materials handling equipment (MHE) fleet utilization and maximizing cost savings. Good data helps fleet managers budget short- and long-term costs, determine correct fleet size, and evaluate whether to lease or buy new equipment. Allen Polk, director of business development for Kenco Fleet Services, offers the following advice to get the most out of lift truck fleet data.

1 Collect data. Companies that don't collect data are missing out on potential savings. Data collection can be as simple as recording information from a maintenance work order or using telemetric devices for a more detailed look.

2 Create accurate maintenance budgets. Good data makes it easier to determine how much you spend per hour on repairs and routine maintenance. You can also forecast production peaks so you can schedule maintenance downtime around them. This will improve uptime and productivity.

3 Utilize complete data. Collecting and inputting complete data ensures useful output. Collecting only one part, such as the total repair cost, does not paint the entire picture. What parts were consumed? How much did the parts cost?

4 Decide what data to use. Once you determine your goals, make sure you analyze the correct data to help meet them. Also decide which metrics will aid in decision-making.

5 Calculate true cost of ownership. Use data to determine how much it costs per hour to operate each piece of equipment. You need to know how much you spend to identify savings.

6 Be proactive. Don't wait until there is a problem or rely on the data to make decisions for you. Use data to track areas of concern so you can project potential issues and make adjustments to your fleet ahead of time. Foster a proactive culture where employees are encouraged to review the data collected and make suggestions.

7 Streamline your fleet. Most companies have too many pieces of equipment. Use data to determine which pieces of equipment you can take out of a fleet to reduce maintenance spend on that particular unit and the labor associated with operating it.

8 Maintain an accurate parts inventory. Fleet data helps reduce downtime by having the right part available at the right time, and allows you to stock what you use.

9 Determine purchases. Analyzing utilization data can help determine if you should lease or purchase MHE, and target the right time to acquire new equipment. If using capital to purchase MHE, utilization data can help determine useful life. Solid data can reduce last-minute emergency expenditures and eliminate mass fleet failures or replacements.

10 Put data to use. Most importantly, use the data. If you don't use it, data is just numbers. ■

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as told to Merrill Douglas



Tim Thoma Brings It In

MAJORED IN GERMAN AND INTERNATIONAL BUSINESS IN college. I enjoyed that so much that when I graduated, I took a job with an international freight forwarder. Eventually, I worked my way up to become manager of the Minneapolis branch of UTi Worldwide. In that role, I was responsible for imports, exports, air and ocean transportation, customs brokerage, and sales. It was a good way to learn about international logistics, because I was serving the individual needs of many customers.

Today, at Northern Tool and Equipment, I'm responsible for moving product that we purchase from overseas, mainly from China and Taiwan. We purchase goods under Free on Board origin port Incoterms (International Commerce Terms).

We move this freight to our three distribution centers, in Fort Mill, S.C., Arlington, Texas, and Savage, Minn. I manage the work of our freight forwarders and make sure our ocean carriers provide space as agreed. In addition, I manage all aspects of customs compliance. That

responsibility starts when we assign the correct Harmonized Tariff Schedule number to a product before one of our buyers purchases it, and it runs until the freight clears customs in the United States.

Over the past year, one of my biggest challenges has been getting space with ocean carriers. The shipping lines seem to have reached a better balance between supply and demand, but for a while we faced difficulties with every piece of freight. In 2014, companies were all shipping early, in anticipation of labor action on

Tim Thoma is international logistics and compliance manager at Northern Tool and Equipment, a multi-channel retailer based in Burnsville, Minn. He has held that position since 2008.

RESPONSIBILITIES

Moving freight from overseas to the company's three distribution centers. This includes managing relationships with freight forwarders and carriers, and overseeing customs compliance.

EXPERIENCE

A series of jobs at freight forwarding companies, leading to a position as manager of the Minneapolis branch of UTi Worldwide; freight services manager, Norman G. Jensen.

EDUCATION

BA, international business/German, University of St. Thomas, 1988.

The Big Questions

How do you like to spend your time when you're not working?

I'm a Scottish Highland games athlete. It's the original extreme sport, developed more than 1,000 years ago. I've also been a home brewer for 25 years.

If you could get a do-over on one decision, what would that be?

I wish I'd taken more economics classes in college, and some world history.

What piece of advice would you give your 18-year-old self?

Don't study German; study Chinese.

What's one career accomplishment you're particularly proud of?

We recently went through a successful focused assessment audit with U.S. Customs. Having them dig deep into our operations and find that we're doing everything correctly was very rewarding.



the West Coast. That filled up ships everywhere. Once the labor action was over, it took another six months to clear the backlog. It was a tough peak season and a tough Chinese New Year.

To keep product moving while capacity was tight, we prioritized shipments, pushing back purchase orders we didn't need urgently. We also evaluated our options outside our carrier contracts, using non-vessel-operating common carriers to pick up some product we needed to move

urgently—at a premium.

In the near future, Northern Tool will implement a new enterprise resource planning system, which I'm sure will impact my activities. Also, we're a growing company and always adding new products. This will likely increase the volume of freight I manage. Our customs broker provides a good purchase order management tool; that will help handle the extra volume.

We've also committed to more space with our carriers, based on projections for

the coming year, and we've broadened our carrier base. If you commit all your freight to one or two carriers, and they get full, it's difficult to manage any surges in your supply chain. But if you use six or eight carriers—some primary and secondary—then one or two of them should be able to help you. Maybe they've added a new string that they need to fill, or they have a Suez route in addition to the Panama Canal. We diversify our transportation to get those options into our supply chain. ■

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LEADERSHIP

*Conversations With
The Captains of Industry*



Bradley S. Jacobs
Chairman & CEO
XPO Logistics

Mark Conrad/Hearst Connecticut Media

An Acquiring Mind

BRAD JACOBS IS NOT ONE TO REST ON LAURELS. Rather, a restlessness within keeps him searching for bigger and bolder challenges. Jacobs built a reputation consolidating disparate companies into industry juggernauts. He kindled his career in oil and gas (Amerex and Hamilton Resources), moved on to waste management (United Waste Management), then dug into the equipment rental sector (United Rentals). His latest venture, XPO Logistics, based in Greenwich, Conn., is taking the supply chain by storm.

In 2004, Jacobs gathered the vestiges of expediter Express-1 and began reinventing the wheel—first as a freight brokerage, then gradually acquiring complementary pieces along the way. In little more than five years, the rebranded XPO Logistics has swallowed a Who's Who of specialized players—Concert Group Logistics, Kelron, 3PD, Pacer International, New Breed, Bridge Terminal Transport, Norbert Dentressangle, and Con-way—on its way to becoming a multibillion-dollar global third-party logistics (3PL) provider.

In the same manner that XPO Logistics seeks to achieve leadership status in the supply chain, Jacobs has followed a similar

path. His roll-up acquisitions strategy has become the stuff of C-level legend. It's predicated on understanding the demands of the market and marrying that recognition with a roll-up-the-sleeves work ethic and determination that attracts investors and eschews middlemen. Jacobs' hands-on approach extends to even the mundane. Corporate press releases are emailed from the man himself. "I like being the chief spokesperson for the company," he explains.

Inbound Logistics recently caught up with the chief spokesperson to talk about his vision for XPO Logistics, and to share insight into what it takes to be a successful leader in today's business world.

THE MUSIC MAN

While Brad Jacobs has spent the past 30 years bringing harmony to fragmented industries, music was his first calling.

He studied under legendary free jazz musician and composer Bill Dixon while a student at Bennington College, Vermont. Even today, Jacobs fondly recalls Dixon visiting his Manhattan apartment years after he had achieved a measure of business success.

"I thought I was impressing him with the views," Jacobs recalls. "As we looked out over the city, Dixon said, 'It's a pity you've wasted your time chasing millions of dollars in the business world. You could've been a great musician.'"

Which begs one question: Is there a correlation between free form jazz and business integration?

"There are similar thinking patterns between the creative music process and business creativity—but I haven't given it a lot of thought," Jacobs says.

Some shareholders might disagree.



IL: What motivated you to invest in third-party logistics?

It is the long-term trend. Transportation and logistics is the last big industry that has not yet been consolidated—but it should be, and it will be. Customers want higher levels of service, but at lower cost. Scale will be necessary to quench their thirst for efficiency. Our industry will likely evolve like other more mature industries, with two or three world-class companies sharing the majority of the market. We're committed to XPO being one of those companies.

IL: XPO Logistics' M&A growth over the past several years has been considerable. As you add complementary pieces to the core, what's your vision for the company?

We want to be the number one or two provider of every key supply chain service. We're a few decades late to achieve that in parcel, and the rails have been consolidated even longer. But for most other parts of the supply chain, we've achieved—or aim to achieve—leadership status. We want to be top-of-mind and the first call for transport and logistics customers worldwide. The quality of our people and technology will always be world-class. We want every customer interaction to be a breath of fresh air.

IL: How has your background in the oil, waste management, and equipment rental industries shaped your approach to acquiring and consolidating logistics companies?

It's not so much about M&A as it is about how some industries just work better when they're less fragmented. Equipment rental and waste management need a highly integrated network—the larger the better, because density improves asset utilization.

IL: Has the logistics sector presented any unique challenges?

Not really. The issues that I deal with every day are the same ones that CEOs in other industries tackle. They mainly center on people. How do you make sure you have the right people at all levels of the organization, and that they keep their heads in the game and are aligned with the interests of customers and shareholders?

IL: Have any specific lessons you've learned in your professional life left an indelible mark?

My mentor, Ludwig Jesselson (a longtime commodity trader and philanthropist), once told me that if you genuinely enjoy solving problems, then you should choose business as a profession. Otherwise, take a different path. You have to adopt a mentality that problems are good things; that they give you an opportunity to use your creativity to find solutions.

IL: Knowing what you know today, what advice would you share with your 20-something-year-old self?

There will never be a time when you have absolutely everything figured out. So don't take yourself too seriously and don't be rigid. Be flexible, agile, and open to change. I've gained a large measure of humility through life's experiences, but if I could go back in time, I'd save young Brad some battle scars.

IL: That said, how would you counsel young professionals starting a career in transportation and logistics?

Think much, much bigger. Stay focused, yet be entrepreneurial. They're not mutually exclusive. You can give your full attention to the job in front of you and still keep your mind open to how it might be done differently or better. If the company you start your career with doesn't appreciate entrepreneurial thinking, find one that does. It's important that you greatly enjoy your job and the people you work with.

IL: What qualities make an effective leader?

Humbleness, courage, fairness, caring, clear thinking, decisiveness, cognitive flexibility, intense energy and focus, and a willingness to sacrifice your personal life for the sake of your employees. You also need the ability to rally the organization around a single, coherent vision; and hire people who are more talented than you are in what they bring to the table.

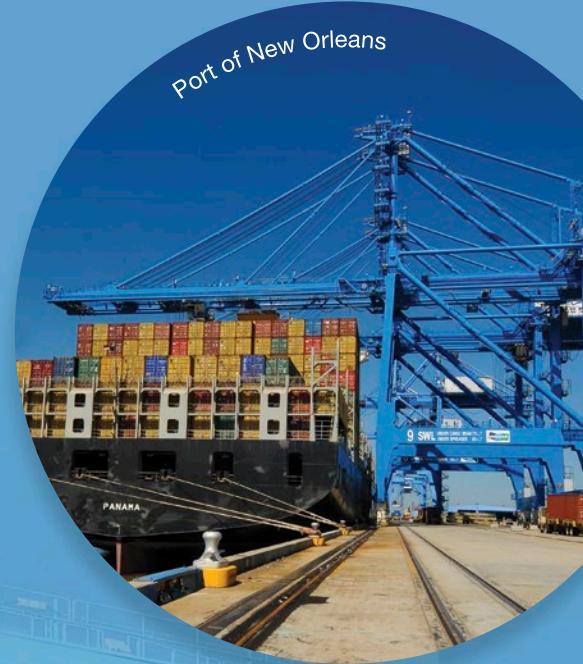
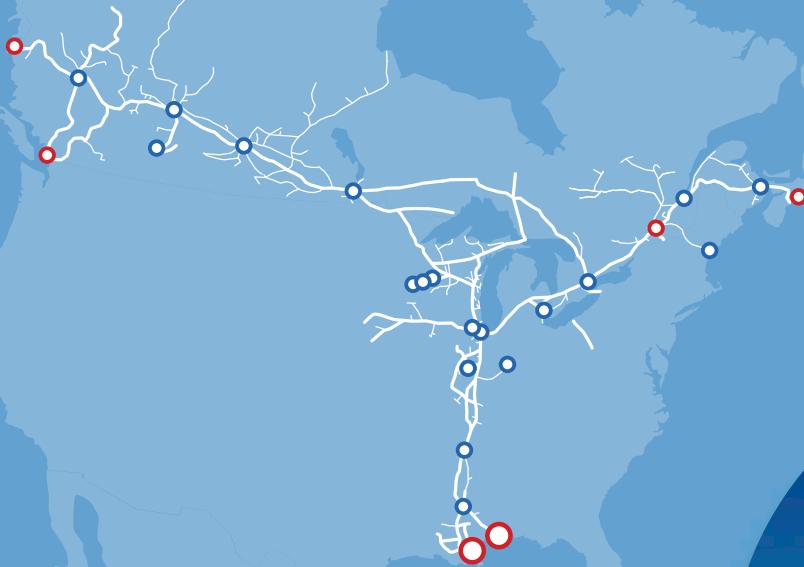
IL: What leaders inspire you?

Futurist Ray Kurzweil is an inspiration as a thought leader, particularly in the area of artificial intelligence. He can look at contemporary trends and envision the outcomes one decade or one century into the future. Kurzweil also puts his brain to practical use as an inventor. And, like many great thinkers, he's fearless about being proven wrong. It's a powerful mix.

IL: If you channel your inner Ray Kurzweil, what disruptive innovations will have the greatest impact on logistics?

Artificial intelligence is much closer to practical application than most people realize. It has huge implications for almost every industry, but particularly for service industries that require nuanced decision-making. Nanotechnology is another potentially disruptive innovation that can alter the flow of manufactured goods, and eventually the contract logistics process. In the long-term, genomics will affect supply chain patterns as we better understand the genetic drivers of health, lifestyle, and even retail preferences. ■





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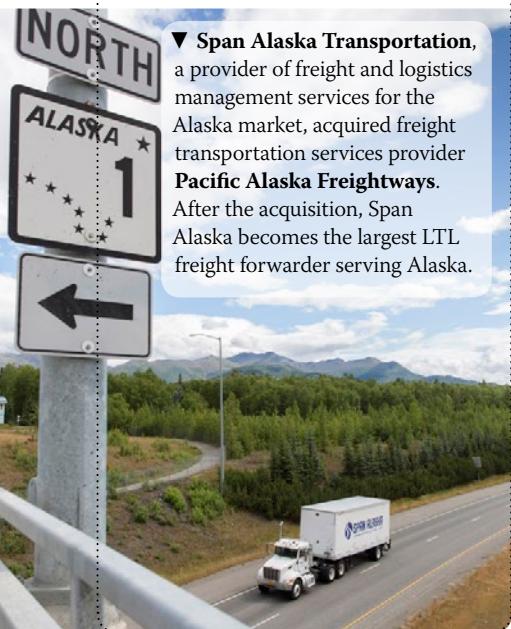
THE SUPPLY CHAIN IN BRIEF

m&a

UTi Worldwide, a global supply chain services and solutions provider, agreed to be acquired by global transport and logistics services supplier **DSV** for \$7.10 in cash per ordinary share. The transaction, which was unanimously approved by both boards of directors, is valued at approximately \$1.35 billion.

Roadrunner Transportation Systems acquired **Stagecoach Cartage and Distribution**, a logistics services provider. Stagecoach offers regional, intermodal, and truckload services throughout the southwestern United States and Mexico.

▼ **Span Alaska Transportation**, a provider of freight and logistics management services for the Alaska market, acquired freight transportation services provider **Pacific Alaska Freightways**. After the acquisition, Span Alaska becomes the largest LTL freight forwarder serving Alaska.



GREEN SEEDS

UPS purchased 125 new hybrid electric delivery trucks as part of a broader program to deploy electric-powered vehicles with greater range and performance. The new trucks deliver significant fuel economy equivalency gains—up to four times the fuel economy of a gasoline-powered vehicle, compared to a 10- to 15-percent improvement with previous hybrid designs. UPS will deploy the trucks in Arizona, Texas, Nevada, Mississippi, Alabama, Georgia, and Florida in early 2016.

Logistics solutions provider **Greencarrier Freight Services** and shipping company **CMA CGM Scandinavia** initiated a long-term collaboration to cut joint CO₂ emissions by 30 percent by 2020. One joint effort involves sea transport to Gothenburg and further transport to Torsvik, where rail has replaced truck transport—a change that reduced CO₂ emissions by 70 percent. They also agreed to make sustainable logistics solutions available on the market.



▲ **Virgin Atlantic Cargo** is set to use lightweight air cargo nets with Dyneema fiber as part of its ongoing initiative to reduce aircraft CO₂ emissions by 30 percent by 2020. The airline initially ordered 600 nets, each weighing less than 20 pounds, nearly nine pounds lighter than a traditional cargo net used to secure shipments on pallets. The nets are also designed to have a five-year operating life compared to an average two to three years for conventional nets.

Transportation company **CN's** sustainability practices have earned it a place on the Dow Jones Sustainability World Index (DJSI) for the fourth consecutive year. The DJSI follows a best-in-class approach, surveying sustainability leaders from each industry on a global and regional level, assessing issues such as corporate governance, risk management, climate change mitigation, supply chain standards, and labor practices.



UP THE CHAIN



ConAgra Foods appointed **David Biegger** executive vice president and chief supply chain officer. In his new role, Biegger has end-to-end supply chain responsibility for the consumer foods business, overseeing manufacturing, procurement, environmental initiatives, health and safety, plant quality, logistics and planning, and transportation and warehousing teams.

◀ **Stacey Burden** was named vice president of supply chain management at **Aero Precision**, a Greenwich AeroGroup company and supplier of OEM systems and aftermarket aircraft spares. Burden is responsible for all aspects of OEM relations, purchasing, sourcing, and repair management.

Pinnacle Foods, a producer, marketer, and distributor of branded food products, appointed **D. Michael Wittman** executive vice president and chief supply chain officer. Wittman reports to Chief Executive Officer Bob Gamgort. He previously served as vice president of supply chain for Mars Chocolate North America.

GOOD WORKS

Lift truck manufacturer **Hyster Company** donated a W50Z walkie pallet truck to the American Red Cross. Used in the organization's Atlanta warehouse, the truck moves critical supplies to support disaster relief efforts.

More than 10,000 **FedEx** team members from around the world volunteered nearly 55,000 hours to hundreds of non-profit organizations during the 11th annual FedEx Cares Week in September 2015. FedEx Corp. began this tradition in a handful of U.S. cities in 2004 and has since expanded it to

nearly 500 global communities—from Memphis to Hong Kong—where its team members live and work.

▼ Package delivery company **OnTrac** donated and delivered backpacks and school supplies to 1,000 elementary, middle, and high

school students in the western United States. OnTrac provided 1,000 backpacks filled with supplies and distributed them to school districts near OnTrac operational facilities in Arizona, California, Colorado, Idaho, Minnesota, Nebraska, Nevada, Oregon, South Dakota, Utah, and Washington.



recognition

Henry Dixon, founder and CEO of Datatrac Corporation, was inducted into the **Customized Logistics and Delivery Association (CLDA) Hall of Fame**. The CLDA provides networking, education, and advocacy to companies offering specialized logistics and delivery services.

XPO Logistics, a global provider of transportation and logistics solutions, was named **Intermodal Carrier of the Year** by Whirlpool Corporation. The award recognizes the quality of service provided by XPO's intermodal business.

Robert Martichenko, LeanCor Supply Chain Group CEO, received the Council of Supply Chain Management Professionals **2015 Distinguished Service Award** for his contributions to the logistics and supply chain management profession.



▲ **Aeroscraft** received the **2014 Corporate Distinguished Service Award** from the National Defense Transportation Association (NDTA) for supporting NDTA goals. The non-profit educational association of government, military, and industry professionals promotes discussion and exchange of information on transportation, distribution, logistics, and national security issues.

GENCO, A FedEx Company, was recognized by Sears Holdings with a **Partners in Transformation Award** based on service innovation, financial performance, collaboration, and in-store and online experience. Sears Holdings presents this distinction to companies that excel in supporting its integrated retail and Shop Your Way programs.



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1 Driver is responsible for monitoring fluid levels and tire pressure between service visits. See Maintenance Booklet for details.
2 Crosswind Assist engages automatically when sensing dangerous wind gusts at highway speeds exceeding 50 mph. Performance is limited by wind severity and available traction, which snow, ice, and other conditions can affect. Feature not available on 3500 models.
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TRENDS

SHAPING THE FUTURE OF LOGISTICS



Amazon Dash Turns the Tide

by Joseph O'Reilly

When Amazon debuted its Dash Replenishment Service (DRS) and buttons in spring 2015, it gave consumers a taste for how the Internet of Things (IoT) can simplify even mundane tasks. The underlying DRS architecture enables connected devices that measure consumable usage to automatically order physical goods from Amazon when supplies run low.

“Customers don’t have to do anything; they can simply rely on the connected device to automatically reorder the consumables that keep their homes running smoothly,” explains Peter Larsen, vice president, Amazon Devices. “For device makers, DRS makes it easy to add re-ordering functionality to deliver a helpful and differentiated experience for customers.”

Dash in a Flash

A rundown of brands using Amazon’s Dash Replenishment Service:

- GE’s high-efficiency washer offers Wi-Fi capability and an app that allows customers to manage detergent replenishment from their smartphones.
- August Smart Lock provides intelligent, secure access to a home - customers can use a smartphone to control who can enter and who can’t - without keys or codes.
- Petnet’s SmartFeeder manages feeding times, portion sizes, consumption, and food supply for pets from a smartphone.
- Samsung’s laser printers and mobile print app allow customers to accurately monitor toner usage over time, and automatically order new toner cartridges.

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From an inventory management perspective, DRS embodies just-in-time replenishment. While ensuring that laundry detergent and razor blades never deplete beyond a certain threshold may be important to some, the application presents huge potential outside the home.

For example, predictive demand sensitivity for replacement parts, batteries, or fluids can have significant advantages for companies operating mission-critical vehicles or equipment where downtime is a costly proposition.

As Amazon builds out its industrial product marketplace – which will help buyers benchmark prices among different vendors – DRS may become procurement’s new best friend. That’s the direction IoT innovation is trending. Replenishment stock will arrive at the dock or door before users even know they need it.

Private Label Price Pressures

Over the past decade many retailers have followed the private label sourcing model to build brand affinity, differentiate products, control pricing, and reduce costs – all of which help increase margins.

The private label industry now represents one in every \$6 of spend in the United States, according to Deloitte’s new sourcing survey. But retailers also face some headwinds. Deloitte recently surveyed nearly 400 apparel, general merchandise, and grocery retailers to illuminate some challenges they face managing costs, turning inventory, and increasing transparency.

Among key trends:

■ **More than cost:** Retailers report they are focusing efforts on product quality, speed to market, and mitigating risk to

satisfy consumers. The majority rank quality assurance programs as the top strategic response for the second year running.

■ **Fewer, deeper manufacturer relationships:** With three in four retailers already integrating or planning to consolidate vendors, the industry is placing bigger bets on fewer manufacturers. This is creating potential ripple effects that could upset the current sourcing landscape.

■ **Mixed success on reshoring:** Moving production to domestic vendors is the top response of retailers to market pressures, with nearly one-third planning to reshore in the future. However, across categories, only 50 to 70 percent of those attempting to reshore have succeeded.

■ **The evolving sourcing organization:** Retailers are significantly investing in technology to manage private label sourcing, in addition to evolving the operating model, governance, and tax strategies.



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TMS: All in a Day's Work

The evolution of transportation management systems (TMS) over the past several years has been fast and furious. Software-as-a-Service paved the way for a new approach to deployment. Applying a traditional outsourcing model to logistics IT implementation afforded users an economical and scalable option. A “free” TMS, or managed service, where buyers pay in accordance to transportation savings, opened the door to small shippers with fixed IT budgets.

Now Cloud Logistics is taking TMS to another extreme. In the latest gambit to attract more small and mid-sized businesses, the West Palm Beach, Fla.-based solutions developer has debuted its Same-Day TMS.

With the continued growth of e-commerce, and the emergence of omnichannel fulfillment strategies, immediacy has become an expectation. That’s certainly the case for online consumers. But now transportation buyers can tap into a similar urgency.

“When we created Cloud Logistics, our goal was to compress the average project cycle time from months to weeks to days,” says Mark Nix, CEO of Cloud Logistics. “This new offering shows that we surpassed that goal and can now help customers start saving on the first day.”

Same-Day TMS provides communication with nearly 1,000 carriers already on the Cloud Logistics network and features many functionalities that shippers expect from a transportation solution, including freight rating, carrier selection, load tendering, and visibility – all of which can be deployed shortly after go-live.

Just a Minute

After Cloud Logistics announced its Same-Day TMS, InMotion Global broke the news that its AscendTMS allows freight brokers, trucking companies, and freight shippers to launch an enterprise level TMS system in less than 60 seconds. According to the company, AscendTMS is the only transportation management and logistics system to achieve this.



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[INFOCUS] TRENDS

SHAPING THE FUTURE OF LOGISTICS

Auto Parts Unlimited

Even when it comes to auto parts, e-commerce is radically changing rules of engagement for consumers. Gone are the days of simply trusting your local mechanic to requisition the right oil filter for the best price.

New UPS research reveals that 56 percent of shoppers buying automotive parts and accessories make their purchases online – an eight-percent increase over the previous year.

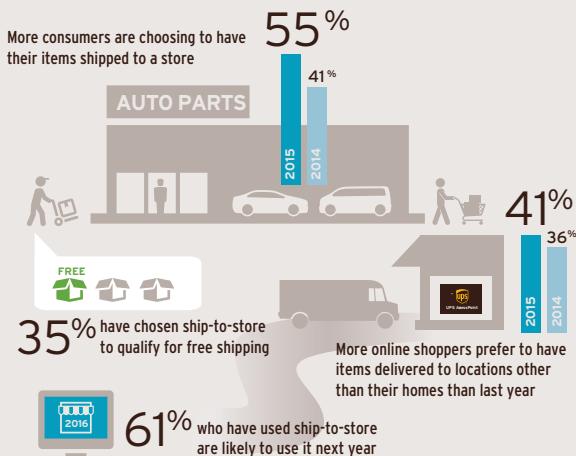
“Research suggests consumers want a seamless experience from their local auto parts supplier, whether a large chain or local independent, across websites and apps, email, and physical store locations,” says Brian Littlefield, UPS director of marketing for the automotive industry.

For example, online comparison-shopping increased 12 percent since 2014, with 95 percent of online automotive aftermarket consumers now comparing products and prices before they buy. A majority (63 percent) use digital coupons, and 52 percent are more likely to shop with a retailer if they receive email offers with discounts, according to UPS’ *What’s Driving the Automotive Parts Online Shopper* study.

Shifts in purchasing behavior are also reflected in the role of

SHIPPING PREFERENCES SHIFT GEARS

Shipping preferences for automotive parts and accessories are evolving. From the rise of ship-to-store to a growing interest in alternate delivery options, consumers are increasingly open to having their packages delivered to locations other than their homes.



SOURCE: *What’s Driving the Automotive Parts Online Shopper*, UPS

the store. Online shoppers buying auto parts use ship-to-store 55 percent of the time, which is a 14-percent increase from 2014, as part of a growing trend toward increased convenience and no-cost ship-to-store pricing. And 86 percent of consumers strongly prefer to return items to a store compared to the prior year.

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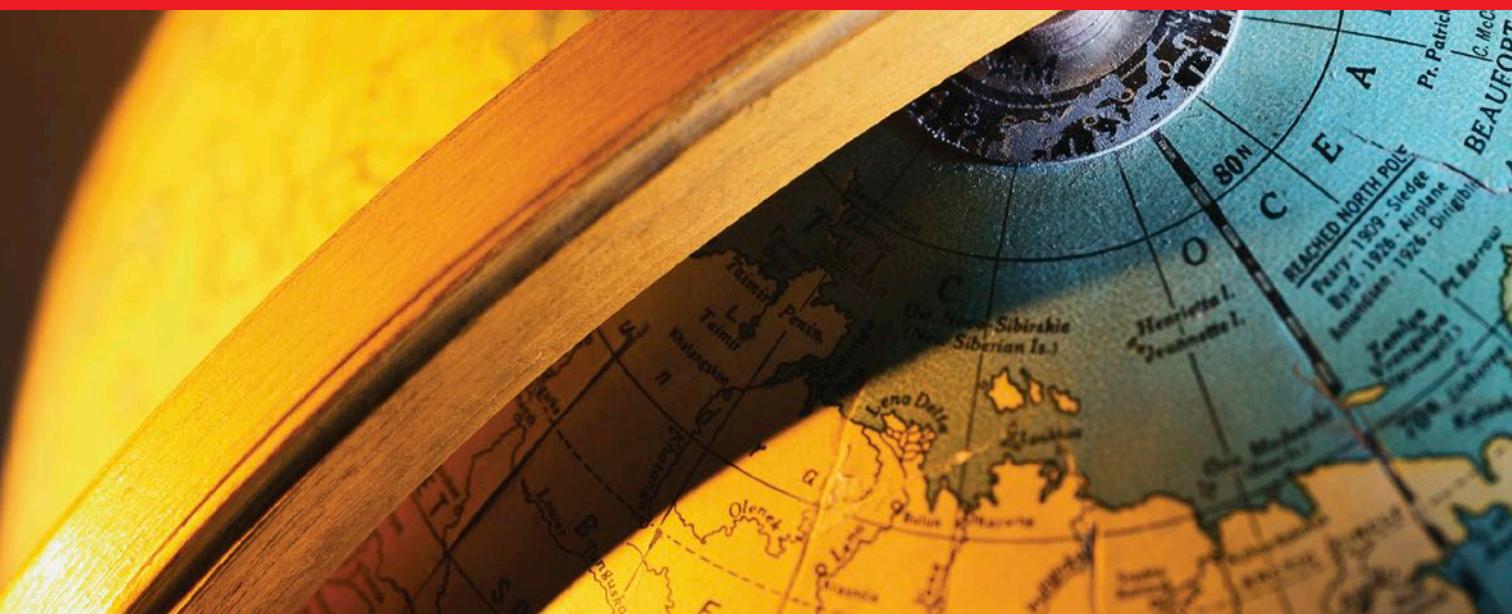
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GLOBAL

THE WORLD AT A GLANCE

by Joseph O'Reilly



The CMA CGM *Bougainville* is the first containership in the world to be equipped with technology that transforms containers into smart connected objects.

Ocean Containers Talk Back

What would Malcom McLean say if “the box” talked back?

Now it does. CMA CGM recently debuted the *Bougainville* as the first containership with connected container technology that transforms the box into a smart asset.

The initiative is part of a collaborative project between the French steamship line and Traxens, a Marseille-based start-up that specializes in container communication technology.

The new 18,000-TEU flagship vessel features Traxens-equipped smart containers that use built-in relay antennas to share data with other assets, as well as with the ship’s communication infrastructure. Collected data is then sent to CMA CGM headquarters in Marseille via Traxens’ data centers.

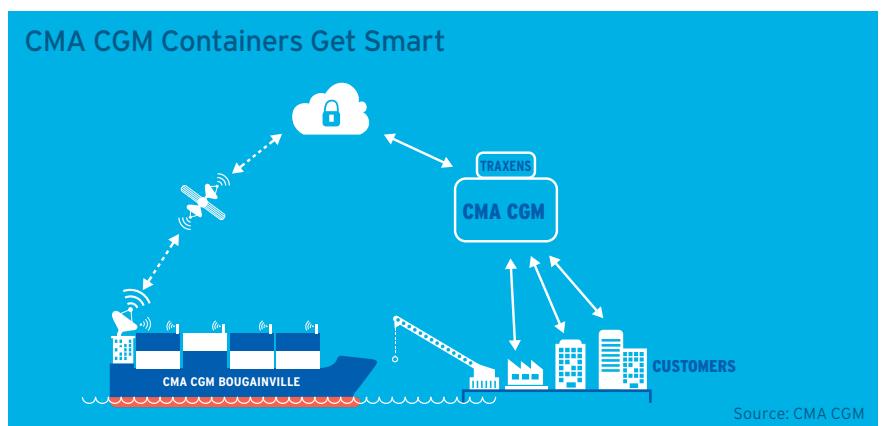
The Traxens system collects real-time data during the container’s transportation

on land or at sea, adding considerable value to the shipping line and to its customers, insurers, and customs. This level of visibility eliminates the intermodal black hole.

Moreover, containers can gather and transmit a wide range of data including location, temperature, humidity level,

vibrations, impacts, attempted breaches, and customs clearance status.

Remotely controlling and adjusting the temperature of refrigerated containers provides even greater value in the transportation of perishable goods while optimizing routine inspections.



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Daimler Accelerates Autonomous Truck Pilot

Imagine speeding along the Autobahn and passing a train of driverless trucks. That future may soon be reality. German automaker Daimler is getting ready to pilot autonomous trucks in-country before the end of 2015, Reuters reports.

The Ministry of Transport and Infrastructure in Stuttgart, Germany, has given the company permission to bring its autonomous 18-wheelers onto the motorways in the state of Baden-Württemberg. Daimler will conduct initial tests there, while the start of mainstream production is likely two to three years away, according to company sources.

Daimler has also been testing the self-driving trucks in Nevada under a special state-granted license.

The automotive company's "Future Truck" uses a combination of assistance systems to drive itself. Sensors, cameras, and steering intervention automatically keep the truck in the middle of its lane. The system also includes a three-dimensional digital map, so that the truck is aware of the route and topography ahead at all times. It can also communicate with other connected vehicles to exchange information.

UAE Embraces Manufacturing Growth, Faces Labor Crunch

The United Arab Emirates (UAE) has made great strides expanding its economy beyond oil-related business, and then rebounding from a global recession that bulldozed construction-heavy development. As an emerging global logistics hub that features a top 10 cargo airport and port, the country has its sights on even further diversification.

The Emirates is steadily making inroads into the manufacturing sector, according to Dubai-based DulSCO HR Solutions, which says almost 33 percent of inquiries it received in September 2015 were for manufacturing projects in the UAE alone.

"We have witnessed a 13-percent increase in job applications in Q2 compared to Q1 that shows a positive outlook from prospective candidates, especially engineering positions," according to the company. "Given the huge potential growth in the manufacturing sector, the manpower requirement in this sector is only going to increase."

Indeed, the Emirates' growing stature as a global transport hub on the periphery of established and emerging markets, such as Europe and Africa, is attracting foreign investment. The Jebel Ali Free Zone is dotted with a who's who of multinational distribution centers. Inevitably, companies will begin expanding to more value-added contract logistics activities.

Still, there's one glaring reality. As the country's manufacturing output grows, so does labor market demand. That's where UAE faces a major challenge. Imported expats comprise upwards of 90 percent of its labor force. Emirati nationals make up a small percentage of the pie – and many of those jobs are in the public sector.

So while there's uncurbed enthusiasm over manufacturing opportunities in UAE, there's equal concern for how that

growth might impact current labor market dynamics – especially given the socio-political undercurrent that already exists on the Arabian Peninsula with regards to indentured servitude and Western efforts to stamp out slavery in the supply chain.

Nicaraguan Canal In Doubt?

Wang Jing, the architect of China's ambitious Nicaraguan Canal project, lost 85 percent of his net worth during the country's stock market crash, according to recent reports. The news created speculation over whether his controversial plan for a \$50-billion channel linking the Atlantic and Pacific Oceans through Lake Nicaragua will happen.

In the span of a few months, Wang's wealth plummeted from \$10 billion to \$1 billion, raising new questions about whether his company, HKND, can still finance the 178-mile canal – and whether the project remains viable.

HKND disputes any cause for concern and anticipates work will commence in 2016 after environmental due diligence runs its course. The company plans to complete the canal within five years.

Slovenian Postal Company Puts Stamp on Logistics

Who said print is dead? State-owned Slovenian postal operator Pošta Slovenije recently acquired the logistics arm of Mladinska Knjiga, the country's largest publishing house, for \$14.5 million. The move is an important step in the courier's plan to "become one of the major providers of trade logistics and supply chain management in Slovenia and the wider region," according to the company.

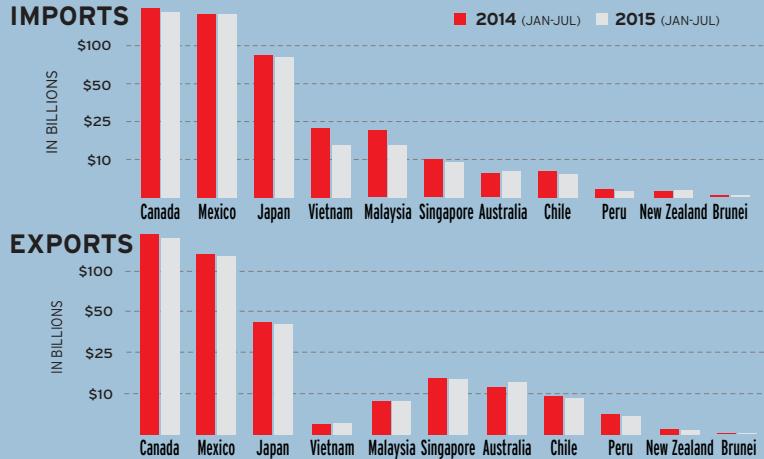
Pošta Slovenije is looking to reinforce

the back end of the business to offset a decline in traditional postal services – an endemic trend around the world.

PwC, for example, has documented a similar dynamic in the UK postal market where “e-substitution” will continue to erode traditional mail over the next decade. More telling, the New York City-based global consultant indicates that a one-percent increase in postage will lead to a 0.6-percent decline in mail volumes on average, citing a recent study of the United Kingdom, United States, and Switzerland. Cost pressures and price increases will only accelerate this shift.

For Pošta Slovenije, the acquisition provides warehousing and distribution assets that will help it continue to diversify the business. The postal company plans to use this new logistics capacity to build out its parcels business, which it sees as a key growth area. []

U.S. Trade With TPP Nations



Imports and exports with the United States have declined for many Trans-Pacific Partnership nations. Were they waiting for the recent partnership arrangement to go through to avoid duties?

Source: Zepol Corporation | www.zepol.com



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Doing Business in China

Q: What do I need to know about doing business in China?

A: Most companies today know why China is a great place for business for manufacturing, regional distribution, and domestic consumption.

What companies may not know is that the logistics costs of doing business in China are quite high. China's trade rules and regulations are complex. A company that tries to replicate its overseas supply chain processes without taking into account China's unique rules and requirements faces negative consequences, including hefty fees and fines, and even criminal complications. China's multiple regulatory agencies all have their own set of rules, and, to make things more complicated, the rules can be enforced differently by province and can change with very short lead times.



KAE-POR

CHANG

Managing Director
Amber Road China

Q: How much of a problem are these China trade issues?

A: While doing business with China is an opportunity for companies of all sizes, most face a wide range of challenges trying to navigate China's complex trade programs. A survey of Amber Road customers found that fully 100 percent were concerned with persistent issues involving the management of their supply chains in China, including excessive costs, fines and penalties imposed by Chinese customs, and reduced efficiency rates from manual errors. About 60 percent expressed concerns that their company could face a "reduced agency rating" from Chinese compliance officials, which would lead to an increase in inspection rates and time-consuming trade flow difficulties. Thirty percent cited costly, extensive audits of their operations as a major issue.

Q: How can I best address these factors so they don't become problems?

A: To address these complexities, many multinational companies are turning to global trade management (GTM) software platforms that incorporate trade functionality specific to China, known as China trade management (CTM). A GTM solution provides a single

centralized platform for managing the cross-border movement of goods, and automates and manages sourcing optimization, foreign supplier management, global transportation management, export/import management, supply chain visibility, and duty management. CTM allows companies to navigate the complex rules and regulations specific to China.

CTM is particularly helpful in lowering trade costs by taking advantage of such duty deferral regimes as Processing Trade and foreign trade zones. Companies also need people in China to constantly monitor and interpret regulatory changes and have the technology architecture that can quickly incorporate them into CTM functions. For instance, China Customs just introduced its first post-clearance self-compliance and voluntary disclosure program. In the past, if a company voluntarily told Customs the declaration was wrong, Customs would start an extensive audit and could downgrade the enterprise classification and impose fines.

With the new program, Customs does not take those administrative measures if the error is not intentional or grossly negligent. To take advantage of the program, a company needs to first know the problems, and the way to do it is through regular, voluntary internal audits.

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BY DR. JEFF KARRENBAUER

President and Co-Founder, INSIGHT, Inc.
jkarrenbauer@insightoutsmart.com | 703-366-3061

Three Steps to Mitigate Supply Chain Risk...Now

A supply chain vulnerability and risk assessment should be an integral part of any overall supply chain strategy analysis. Unfortunately, this is rarely the case.

Many businesses don't address supply chain vulnerability and aren't prepared for potential supply chain disruptions due to either random acts of nature or deliberate actions. The recent West Coast port strike is an excellent example of where advanced planning could have made a significant difference. Once containers are already in the port, or on a ship in the queue outside the harbor, it's already too late.

So, how can you go about assessing supply chain risk? A proper vulnerability analysis is a three-step holistic process that encompasses the entire supply chain, starting with a company's customers and the products they purchase, then working back to the upper-most tier of raw material suppliers.

1. Preliminary discussion. This phase focuses on education, informal company assessment of risk, supply chain description, and fundamental strategic drivers. A rigorous study involves formal supply chain mapping to include commodities, facilities, inventory, transportation, customer locations, and information flow details.

2. Audit. Typically the most time-consuming phase, the audit consists of detailed information gathering. For

example, prepare databases for raw materials, work-in-process products, and finished products that contain annual volume in units, sales and profits, number of sources, and location and contribution of each source. For raw materials and intermediate product items, annual sales and profits are the corresponding values summed across all the finished products for which they are part of the bill of materials.

To evaluate the viability of vendors, gather a variety of financial, performance, and business environment data. You can then apply various predictive analytics and statistical methods to develop models of vendor success or failure.

This step requires time, patience, persistence, expertise, and management commitment to an ongoing program of vendor evaluations. A supply chain map should include:

- Descriptive data.
- Commodities (raw material, intermediate product, finished product).
- Locations (supplier, manufacturing, port, distribution center, crossdock, pool point, customer).
- Major channels (especially critical in omni-channel environments).

- Customer demand data (preferably at a line-item level of transaction detail).
- Facility costs and capacities (procurement, manufacturing, distribution center, port handling, inventory).

■ Transportation costs and historical utilization (preferably by lane/mode/shipment size).

- Duties and taxes, if applicable.
- Detailed historical flows by link, location, and commodity.

3. Create a model using advanced network analytics. Use this opportunity to redesign the supply chain and ask questions about location, capacities, customer service, and sustainability goals. Here are four examples of possible analyses for a vulnerability assessment:

- Eliminating facility locations one at a time, two at a time, and so on.
- Forcing service to critical customers from secondary locations.
- Forcing allocation of a portion of procurement and manufacturing activity to secondary locations to diversify risk.
- Following the prescriptive optimization-based analysis with a detailed, day-by-day descriptive simulation of a proposed network.

Waiting to address your company's supply chain vulnerability is a serious mistake, with potentially catastrophic consequences. It is well beyond time to dedicate resources to careful planning and formal risk mitigation. ■

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THE LEAN SUPPLY CHAIN

BY PAUL A. MYERSON

Professor of Practice in Supply Chain Management at Lehigh University and author of books on Lean for McGraw-Hill, and supply chain for Pearson
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Measuring to Manage Or Barely Managing to Measure

Respondents to a Bain & Company survey say they run their supply chains only half as efficiently as top supply chain performers such as Toyota, Dell, and Home Depot. In fact, top-quartile performers spend just 4.2 percent of revenue on supply chain costs, compared to almost 10 percent for average performers in the same industry.

What might explain this? While most respondents feel their supply chain gives them a competitive advantage, 45 percent say they have only little or basic supply chain data. While lack of critical technology can contribute to that dearth of data, it can also be due to a variety of other issues such as not aligning your supply chain with the overall company strategy, being too focused on your internal supply chain, or coping with the challenges of omni-channel marketing.

A supply chain's performance is the result of policies and procedures that drive various critical segments of the operation. The challenge is designing metrics to manage organizations that are comprised of complex and interconnected systems. This challenge is rapidly gaining importance as supply chain managers face increased pressures on customer service and asset performance.

Sony, for instance, is acutely aware that its products at Best Buy and

Walmart ultimately affect profitability the longer its products sit on the shelf. As a result, the electronics company changed its delivery metric from "sell-in" to "sell-through." Sell-in allows its sales department to chalk up a sale when product is shipped to the retailer; sell-through chalks up a sale only after the product is sold and paid for.

As competition increases, and market forces continually change, supply chain performance management is a critical area to help companies sustain and gain competitive advantage by enabling an agile, lean, and efficient customer-oriented supply chain. One step in the Lean journey is to identify objectives that tie to overall business strategies and goals, including metrics to measure whether or not your company is successful in attaining these objectives.

The old saying, "If you can't measure something, you can't improve it" is especially true in a Lean supply chain. Even

if you are measuring performance, you may be measuring the wrong things in some cases. Here are a few examples:

- Engineering designs products without a Lean supply chain in mind.
- Accounting focuses on measures for individual processes, but does not consider the performance of the entire process, internal and even external.
- Sales focuses primarily on booking orders without regard for what product mix the company planned to be sold and produced.
- Plant management focuses on shipping dollars, and uses efficiency, utilization, and overhead absorption metrics that go head to head with the goal of reducing cycle time and customer satisfaction.

It is critical to set meaningful, relevant, and attainable targets based on a holistic strategy for internal and external networks to ensure that everyone is focused on a Lean supply chain. At the same time, don't create paralysis by analysis, where people end up focusing more on the numbers than on the customers.

Parts of this column are adapted from *Lean Supply Chain & Logistics Management* (McGraw-Hill; 2012), *Lean Retail and Wholesale* (McGraw-Hill; 2014) and *Supply Chain and Logistics Management Made Easy* (Pearson, 2015) by Paul A. Myerson with permission from McGraw-Hill and Pearson, respectively.

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VIEWPOINT

BY GARY C. SMITH

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Product Philanthropy: An Efficient Way to Move Unwanted Inventory

While businesses have made great strides in inventory management, many have yet to adopt a truly efficient, cost-effective process for moving unprofitable stock.

Discounting merchandise eats into profits and devalues the corporate brand. Liquidating is even less profitable and more laborious. As a result, many otherwise efficient operations end up housing idle stock far longer than they should, tying up valuable warehouse space.

Excess inventory is a common problem that, fortunately, contains its own best solution. It's called product philanthropy — donating unwanted products to charity. Done right, product philanthropy requires minimal time and labor, yet generates solid returns.

Yes, It's Tax Deductible

Under Section 170(e)(3) of the U.S. Internal Revenue Code, businesses can earn a significant tax deduction for gifts-in-kind donations. The IRS Code states that regular C corporations may deduct the cost of the inventory donated, plus half the difference between cost and fair market value, not to exceed twice the cost.

For example, if a product costs \$10 and you sell it for \$30, the difference is \$20. Half of \$20 is \$10. Add the \$10 product cost and the \$10 difference, and

your deduction equals \$20. Because \$20 does not exceed twice the product cost, a \$20 deduction is yours.

Multiply that by all your unwanted stock, and the tax benefits add up.

Minimal Labor for You

When you funnel your donations to a gifts-in-kind organization, it gets even better, because the process requires little on your part. Gifts-in-kind organizations are nonprofits that collect product donations, then distribute them to qualified nonprofits that, in turn, give them to people in need.

Once you become a member of an organization's donor network, it's an easy process for you. Typically, applying for membership is as simple as completing a form. Then, once you're a member, you can make donations at any time.

Submit for approval a list of the inventory you'd like to donate. Once it's approved, ship the stock to a designated location. From there, the gifts-in-kind organization takes over, sorting, cataloging, and making those products available to its member charities.

You'll receive tax documentation for your records. And after the products are donated, you'll learn the names of the charities that benefited from them.

Product philanthropy via gifts-in-kind organizations gives you an efficient, repeatable workflow for disposing of unwanted inventory. You'll be able to predict how much time and effort it will require of your workforce. You can calculate the financial gain in advance. These are advantages you rarely enjoy when discounting and liquidating merchandise.

And there are other benefits, too:

■ **Get down to just-in-time inventory.** Donating non-moving product clears it out quickly.

■ **Focus on top sellers.** Eliminating stagnant inventory lets you concentrate on money makers, not money losers.

■ **Avoid liquidation headaches.** Liquidators tend to pick and choose, leaving you with the problem of leftovers. Donating often clears out all your problem products — outdated supplies, slow-selling SKUs, unsuccessful new products, discontinued models — at once.

Product philanthropy makes it easy for you to not only clear your warehouse quickly and cost-effectively, but also to put those products into the hands of people in need. ■

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I N T E R

MAKING THE CONNECTION

Intermodal transport requires all modes to work together seamlessly. It's all about connectivity. BY DEBRA PHILLIPS

38 Inbound Logistics • October 2015

**BOLD
STEP**

The ports of **Seattle and Tacoma** have combined their strengths and resources. **3rd largest gateway** in North America. Ranked #1 for **ease of doing business**.


**THE NORTHWEST
SEAPORT ALLIANCE**

MODAL



October 2015 • Inbound Logistics 39



The ports of Seattle and Tacoma have combined their strengths and resources.
3rd largest gateway in North America. Ranked #1 for ease of doing business.



Intermodal transportation has been a fundamental part of supply chain management for more than two decades, and indications point to continued industry growth. Intermodal volumes grew 4.5 percent in the second quarter of 2015 over the prior year, and international intermodal also surpassed expectations for the quarter, according to a recent Intermodal Association of North America (IANA) report.

“International volumes displayed one of the largest increases since IANA began keeping records,” says Joni Casey, president and CEO of IANA. “While much of the strong performance in the second quarter was due to the recovery from the first quarter’s port congestion issues, strengthening imports also played a role in pushing international volumes higher.”

Intermodal marketing companies (IMCs) also posted strong year-over-year Q2 volume growth. Intermodal loads jumped 4.5 percent, and IMC highway volume soared 8.2 percent, which was three times the pace of overall highway trailer loads.

Not only is intermodal growing in overall volumes, it is becoming a dominant part of many railroads’ business portfolios, IANA states. One example is CSX.

“Intermodal is the fastest-growing part of the CSX portfolio, handling more than 2.7 million units in 2014,” says spokesperson Melanie Cost. “In the first six months of 2015, intermodal volume has increased three percent compared to 2014.”

CSX and other railroads continue to

work to divert freight from trucks to trains. CSX offers a proprietary Highway to Rail (H2R) Optimizer tool that shippers can access from the company’s website. The tool helps shippers make decisions based on the economic and environmental benefits of rail, according to Cost.

INTERMODAL CHALLENGES

Approximately 10 to 15 percent of landed freight moves by rail; the remainder moves by truck, says the American Trucking Associations (ATA). While recognizing that many trucking customers also use rail providers, the ATA states that intermodal transportation is not without its own challenges.

“Intermodal requires operational cooperation and dependence with ocean carriers, terminals, railroads, and other third parties, diminishing the control-dispatch independence that truckers otherwise had over their operations,” says Dave Manning, president of TCW, a trucking company based in Nashville, Tenn., and member of the Board of Directors of the ATA’s Intermodal

Motor Carrier Conference. “Their problems, unfortunately, become our problems.”

Shippers managing global supply chains recognize firsthand the impact that each mode and leg has on the overall transport of goods. While ocean, rail, and trucking providers all remain committed to improvement in their respective industry sectors, intermodal transportation requires the modes to work together seamlessly. For shippers, or beneficial cargo owners, intermodal transportation is all about connectivity.

Many railroads are addressing the needs of their intermodal customers by investing in equipment and technology. They are also investing in infrastructure that allows easy access to port locations and inland intermodal sites. Western U.S. ports are “investing in unprecedented infrastructure” that will connect with rail networks, according to Burlington Northern Santa Fe (BNSF) Railway.

WEST COAST TRENDS UP

West Coast ports continue to handle a majority share of Asian imports into the United States, a trend that the railroad predicts will continue, according to Katie Farmer, vice president of BNSF’s consumer products group. The rail works closely with West Coast ports to provide direct access to key markets, including Dallas/Fort Worth, Kansas City, Chicago, and Memphis.

“We expect growth in both the Pacific

To grow domestic intermodal volume, BNSF Railway continues to launch more and faster expedited services connecting Chicago and St. Paul, Minn., to the Pacific Northwest.



Southwest and Pacific Northwest port gateways,” says Farmer. “We have made record investments in our West Coast facilities and in all the routes leading from the West Coast to our inland hubs.”

On the East Coast, CSX directly serves more than 50 intermodal terminals, and has access to all major ports on the Atlantic and Gulf coasts. It also connects with other railroads to serve West Coast ports.

A BENEFIT TO PORTS

New port development also plays a role in intermodal transportation. Both Canada’s Prince Rupert in the far northwest Pacific, and Mexico’s Lázaro Cárdenas south of California, have helped create outlet ports that have benefitted their exclusive carriers, Canadian National and Kansas City Southern, respectively, according to a recent whitepaper published by Wall Street transportation analyst Tony Hatch.

Railroads, ocean carriers, and trucking companies realize the benefits of infrastructure improvements that eliminate congestion on highways or roads surrounding ports. Ports also realize gains as a result

of increased rail connectivity.

Curtis Foltz, executive director of the Port of Savannah, sees outstanding rail connectivity as “hugely strategic and critical to future growth.” With both Norfolk Southern and CSX terminals on port, Foltz indicates that approximately 20 percent of all products arriving by container into the Port of Savannah leaves the port via rail, with 80 percent moving by truck.

“We forecast that the percentage of cargo moving by rail will grow to about 26 percent,” Foltz says. “Rail transportation is economical, environmentally friendly, and reduces the burden on our nation’s highway system.”

Supply chain management will never, however, be a “one size fits all” industry, says Foltz. “When making transportation routing decisions, shippers must consider issues of service reliability, the cost of carrying inventory, and the shelf life of goods,” he explains.

Other East Coast ports are also experiencing benefits as a result of enhanced rail connectivity. PortMiami, for example, has on-dock rail, and Port Everglades offers near dock rail through their respective

strategic alliances with Florida East Coast Railway (FECR).

In July 2015, FECR and Port Everglades celebrated the one-year anniversary of the completion of FECR’s Intermodal Container Transfer Facility (ICTF), adjacent to Port Everglades.

“The ICTF ensures that Port Everglades is competitive with other U.S. East Coast gateways, and, most importantly, gives South Florida a cost and time-to-market advantage over many of these gateways,” stated Steve Cernak, Port Everglades chief executive and port director in a joint press release between FECR and the port.

INVESTING IN EQUIPMENT

While railroads are investing in infrastructure to better serve ports, trucking companies are also making investments in equipment to support port requirements. For the past several years, truckers have been upgrading and replacing older trucks with 2007 EPA emission compliant trucks to meet port-clean mandated requirements in various ports around the country, according to the ATA.

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Approximately 20 percent of all products arriving by container into the Port of Savannah leave the port via rail, while 80 percent move by truck. The port predicts that the percentage of cargo moving by rail will continue to grow.

provide shipping information and visibility to intermodal shippers. “CSX allows shippers to trace their freight from rail origin to destination by connecting to the ShipCSX tracking system from their desktop or mobile device,” explains Cost. “While the fluid nature of the rail network means we can’t guarantee a to-the-minute estimated time of arrival, shippers are able to plan in advance to receive the freight.”

BNSF makes a variety of tools available to help customers plan, ship, trace, and manage shipments. All BNSF customers receive a unique user name and password that allow them to access the full suite of tools. One popular application is called “Rail Central,” which enables customers to create multiple customized reports and schedule them to be sent via email.

In addition, BNSF also offers “Track Your Shipment,” allowing shippers to trace up to 300 units and drill down to individual units to view more details about the shipment. Intermodal shippers also use “Display Intermodal Lot Location,” a tool that enables them to receive accurate lot location information, providing an estimated time when the shipment will be available, and the date when free storage expires for that particular shipment.

“In Southern California alone, motor carriers spent more than \$1 billion,” says Manning. “The New York/New Jersey port complex will impose the same type of 07 compliant engines in 2017.”

Ocean carriers often select ports based on efficiency and cycle time, or the ability to discharge/stow cargo rapidly. This is critical to allow ocean carriers to meet the needs of their shipper customers and to maximize asset utilization. That’s why shippers are starting to prefer ports of call that support efficient loading or unloading of containers to land distribution networks.

“Companies are running in real-time or just-in-time environments, and any interruption can have significant supply chain impacts,” notes Robert Weist, vice president of North American transportation for Crowley Maritime, which serves port locations in Pennsauken, N.J.; Jacksonville, Port Everglades/Miami, Fla.; Gulfport, Miss.; and San Juan, Puerto Rico. From these ports, Crowley serves the eastern and western Caribbean and Central America.

Crowley uses electronic data interchange (EDI) and other types of technology to manage shipments and provide a seamless experience for the beneficial cargo owners (BCOs) the company serves, says Weist. This includes managing both Crowley

events and standard rail EDI events. From the time a vessel is discharged, Crowley monitors at least four other events before the cargo reaches the in-gate railroad. The carrier also monitors at least 15 events during the rail portion of the shipment before the cargo is unloaded from the train and is in the process of being transported by drayage or truck to the customer location.

Railroads are also developing systems to

Total Intermodal Loadings 2000-2014



Intermodal volume rose 4.8 percent in 2014, with domestic containers leading growth and international intermodal delivering its biggest year-over-year advance since 2011.

Source: IANA Intermodal Market Trends & Statistics Report



With ocean carriers, railroads, and trucking companies all offering different options for tracking and tracing, how does a shipper manage information across multiple modes and providers? In some instances, shippers turn to neutral third-party logistics providers or ask for a “push” system to receive information from a variety of providers.

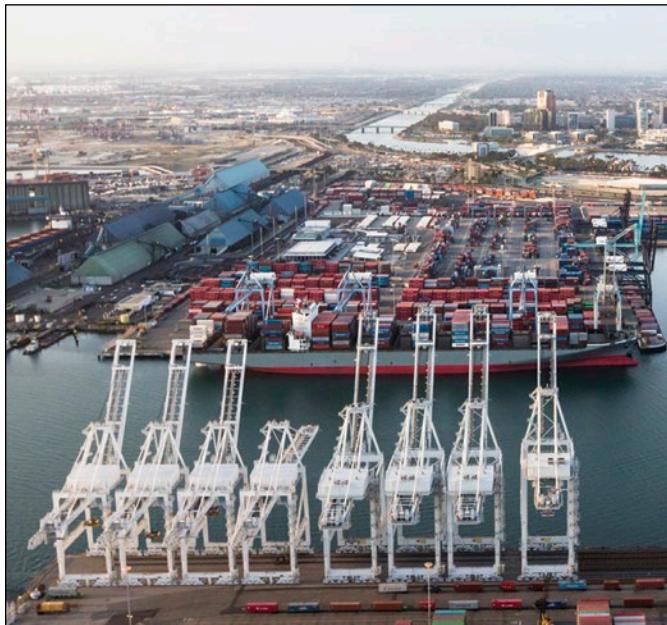
TriMas Corporation uses international and domestic intermodal daily. The Bloomfield Hills, Mich.-based company is a diversified global designer, manufacturer, and distributor of engineered products that serve a variety of industrial, commercial, and consumer end markets. TriMas operates 50 facilities in 16 countries.

OCEAN TO RAIL TO TRUCK

A typical shipment for TriMas might begin with product being manufactured in China and traveling by ocean carrier to a U.S. port location, typically on the West Coast. From there, the shipment moves by rail to Chicago, then through a drayage carrier to the TriMas location in South Bend, Ind. At that point, less-than-truckload, truckload, or parcel carriers move products to end users.

The company relies on a non-vessel-operating common carrier (NVOCC) to manage relationships with ocean carriers and railroads, while TriMas logistics team members interact directly with parcel or trucking companies, says Candace Holowicki, director of global transportation and logistics for TriMas.

Across every mode, Holowicki stays closely involved with all negotiations and provider selections. “It is important that everyone is



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on the same page and understands our expectations,” she says.

TriMas manages by exception, and views each leg and mode as an opportunity to support its supply chain, in some instances following a “plug and play” approach. The company uses global trade management tools, as well as its own transportation management system.

Regardless of the many tools available, however, collaboration and communication are required to manage a complex multi-modal global supply chain, Holowicki says.

“We focus our attention where we can make the greatest impact,” she says. “There is little I can do while a shipment is traveling across the ocean. For landed distribution, however, we can make decisions based on the situation’s unique needs, such as demand being higher than anticipated in any of our product lines.”

For example, Holowicki must work with TriMas vendors, procurement, and manufacturing to address specific supply chain needs. If a production line sits idle or demand exceeds expectations, “we have to do the analysis and make a decision,” she says. “In that situation, we may not have the option of using an economical rail solution to move products from the West Coast to Chicago. Due to time-sensitivity, we may look into trucking that shipment.”

Whether dealing with a unique situation or day-to-day supply chain needs, connectivity with transportation service providers and internal customers is the key to successful execution. Holowicki sums up her advice to other logistics professionals in one word: “Communicate.” ■



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TOP 10

U.S. CONTAINER PORTS

***Inbound Logistics* dredges up data on the leading U.S. container hubs.**

The extent to which the Panama Canal expansion will impact U.S. container trade patterns remains to be seen. But to some degree, the knock-on effect is already apparent. East Coast ports have been aggressively seeking funding to deepen harbors and improve accessibility that will entrench long-term support from carriers and shippers alike.

The Port Authority of New York & New Jersey is busy raising the Bayonne Bridge at a cost of \$1.3 billion to accommodate larger container ships. After more than one decade of legal wrangling, the Georgia Ports Authority has finally commenced a \$706-million dredging project to deepen the Savannah harbor. Meanwhile, across the state of Florida, public and private sector interests have jumped on board a multimodal roadmap that is injecting billions of dollars into infrastructure upgrades along the Jacksonville-to-Miami corridor.

Container volumes in and out of East Coast ports are growing appreciably. While Los Angeles and Long Beach remain the bell cows of U.S. container throughput, Charleston, Savannah, Port Everglades, and Virginia ports are the fastest growing hubs. Notably, they're all in the Southeast. Shifting demographics necessarily trigger an upswell in demand.

continued on page 46

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**BOLD
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The ports of **Seattle and Tacoma** have combined their strengths and resources.
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**THE NORTHWEST
SEAPORT ALLIANCE**

continued from page 45

There are other considerations as well. Recurring labor strife at West Coast ports gives U.S. shippers and consignees more incentive to diversify port strategies. Flexibility and redundancy are imperatives.

Global sourcing dynamics are similarly changing. As China's low-cost competitiveness wanes, Southeast Asia and India are emerging as fitting suitors for U.S. offshore activity. This brings the Suez trade into play. On the horizon, the west coast of Africa looms as another source-from and sell-into magnet.

Shippers are even looking beyond the east and west coasts, especially as capacity tightens and sustainability mandates mature. Great Lake and Gulf Coast ports provide direct access to the

North American hinterland, which is attractive for importers and exporters looking to shorten overland drays and reduce transportation costs.

Lastly, as larger containerships come online—there's even talk now of a 25,000-TEU prototype—port throughput becomes a differentiator. Back-door speed is just as important as front-door accessibility.

For these reasons and more, port selection is an important component of supply chain strategy. To help you make sense of where volume is trending, *Inbound Logistics'* Top 10 Container Ports provides a snapshot of the U.S. port industry.

Sources: Lloyd's List's Containerization International 2014 Top 100 Container Ports; American Association of Port Authorities; CIA's The World Factbook.



1 PORT OF LOS ANGELES

PORTOFLOSANGELES.ORG

MAIN CHANNEL DEPTH
53'

TRADE DATA

2014 TOTAL TEUs: 8,340,065
YEAR-OVER-YEAR GROWTH: 6%
INBOUND: 4,429,914 TEUs
OUTBOUND: 3,910,151 TEUs

TRADE PARTNERS

- China/Hong Kong
- Japan
- South Korea
- Taiwan
- Vietnam

EXPORTS

- Paper/wastepaper
- Pet and animal feeds
- Scrap metal
- Fabric
- Soybeans

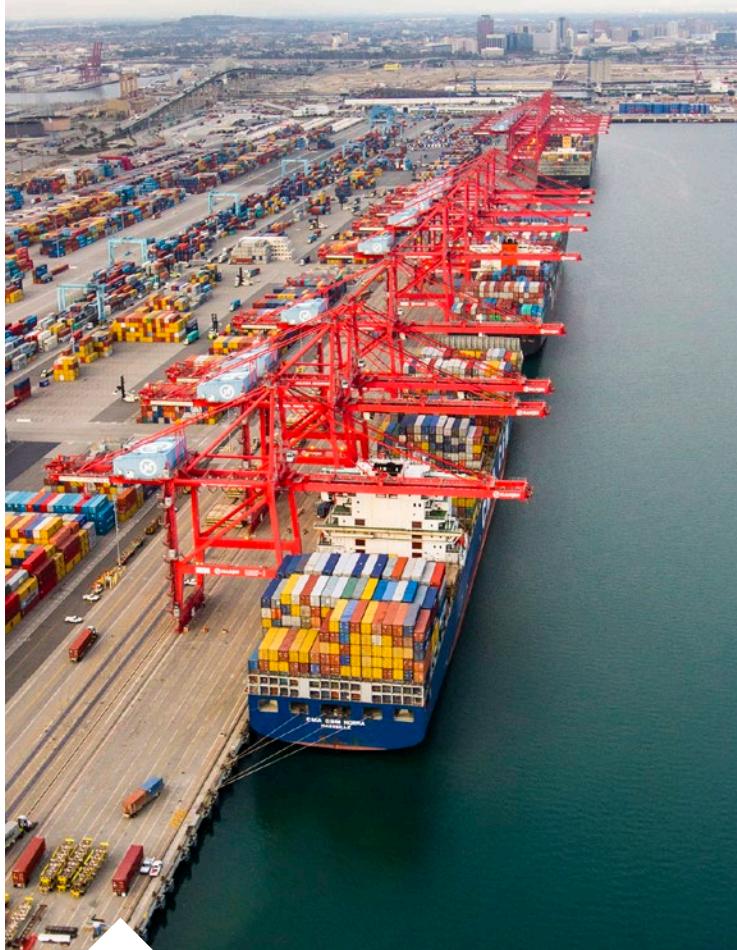
IMPORTS

- Furniture
- Auto parts
- Apparel
- Electronics
- Footwear

Port of Los Angeles

Empties are included in all TEU volumes unless where specified.





3 PORT AUTHORITY OF NEW YORK & NEW JERSEY

PANYNJ.GOV/PORT

MAIN CHANNEL DEPTH
50'

TRADE DATA

2013 TOTAL TEUs: 5,467,347

2014 TOTAL TEUs: 5,772,303

YEAR-OVER-YEAR GROWTH: 5.6%

INBOUND: 2,969,636 TEUs

OUTBOUND: 2,802,667 TEUs

EMPTIES: 1,240,091 TEUs

TRADE PARTNERS

- China/Hong Kong
- India
- Germany
- Italy
- Netherlands
- United Kingdom
- Brazil
- France
- South Korea

IMPORTS

- Furniture
- Beverages
- Machinery
- Apparel

EXPORTS

- Paper
- Scrap and waste
- Motor vehicles
- Automobile parts
- Household goods



2 PORT OF LONG BEACH

POLB.COM

MAIN CHANNEL DEPTH
76'

TRADE DATA

2014 TOTAL TEUs: 6,820,806

YEAR-OVER-YEAR GROWTH: 1.3%

INBOUND: 3,517,514 TEUs

OUTBOUND: 1,604,394 TEUs

EMPTIES: 1,698,898 TEUs

TRADE PARTNERS

- China/Hong Kong
- South Korea
- Japan
- Taiwan
- Vietnam
- Iraq
- Australia
- Ecuador
- Indonesia

IMPORTS

- Crude oil
- Electronics
- Plastics
- Furniture
- Clothing

EXPORTS

- Petroleum coke
- Petroleum bulk
- Chemicals
- Waste paper
- Food

4 PORT OF SEATTLE & TACOMA*

NWSEAPORTALLIANCE.COM

MAIN CHANNEL DEPTH
50-51'

TRADE DATA

2014 TOTAL TEUs: 3,427,561

YEAR-OVER-YEAR GROWTH: -0.2%

INBOUND: 1,378,504 TEUs

OUTBOUND: 1,178,324 TEUs

DOMESTIC (ALASKA AND HAWAII): 870,733 TEUs

TRADE PARTNERS

- China
- Japan
- South Korea
- Taiwan
- Thailand
- Vietnam
- Canada
- Australia
- Malaysia
- Indonesia

IMPORTS

- Industrial machinery
- Vehicles and parts
- Electronics
- Toys, games, and sports equipment
- Apparel and footwear
- Furniture
- Aircraft and parts
- Plastics

EXPORTS

- Oil seeds and grains
- Industrial machinery
- Prepared vegetables, fruit, and nuts
- Meat
- Wood and wood products
- Paper
- Seafood

*In 2015 the Seattle and Tacoma port commissions formed The Northwest Seaport Alliance to unify management of the two ports' marine cargo terminals.

Don Wilson

5 PORT OF SAVANNAH

GAPORTS.COM/PORTOFSAVANNAH

TRADE DATA

2014 TOTAL TEUs: 3,346,024

YEAR-OVER-YEAR GROWTH: 10.3%

INBOUND: 1,604,665 TEUs

OUTBOUND: 1,741,359 TEUs

MAIN CHANNEL DEPTH
42'

TRADE PARTNERS

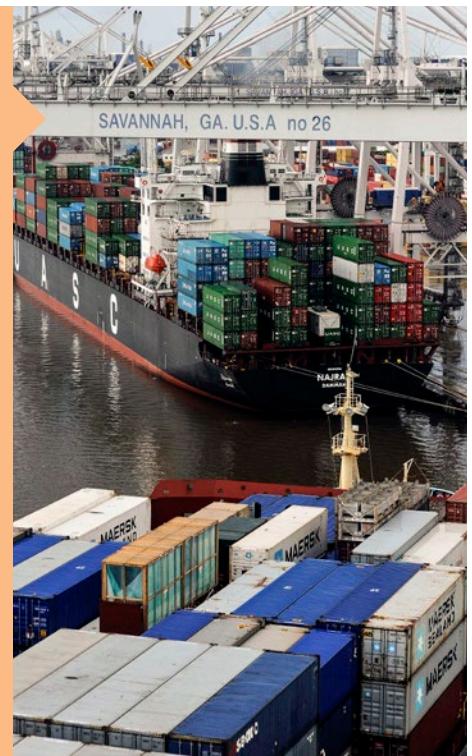
- China
- South Korea
- Japan
- Germany
- India
- Italy
- Turkey

IMPORTS

- Consumer goods
- Furniture
- Machinery
- Appliances
- Electronics
- Automotive
- Hardware and housewares
- Food

EXPORTS

- Food
- Wood pulp
- Paper and paperboard
- Clay
- Fabrics
- Consumer goods
- Automotive



Stephen B. Merton/Georgia Ports Authority

6 PORT OF OAKLAND

PORTOFOAKLAND.COM

TRADE DATA

2014 TOTAL TEUs: 2,394,069

YEAR-OVER-YEAR GROWTH: 2%

INBOUND: 845,810 TEUs

OUTBOUND: 969,378 TEUs

EMPTIES: 578,881 TEUs

TRADE PARTNERS

- China
- Japan
- Taiwan
- South Korea
- Vietnam
- Australia
- Thailand
- France
- Germany

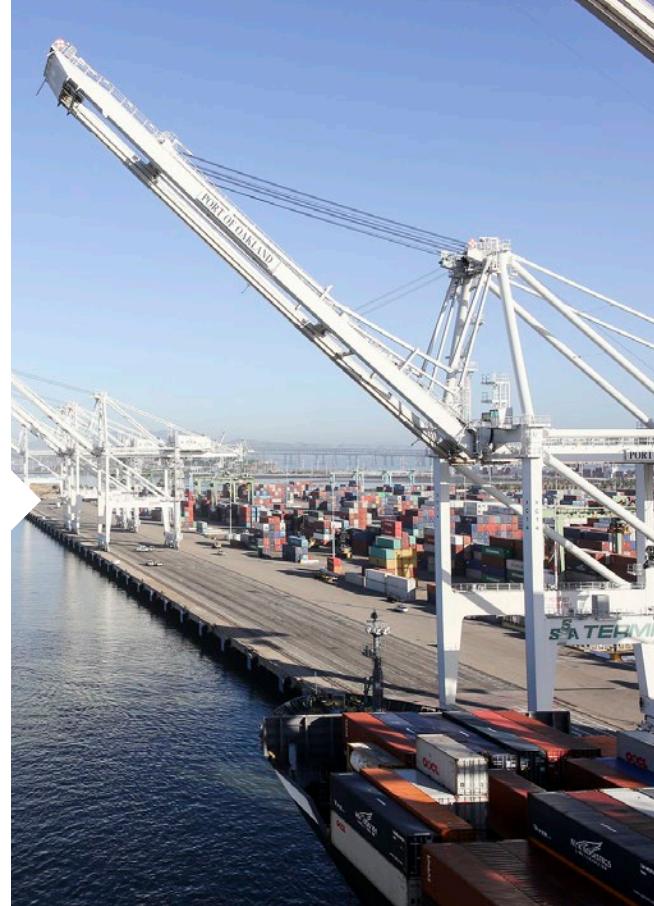
IMPORTS

- Machinery
- Apparel
- Electronic equipment
- Furniture
- Wine and spirits
- Plastics
- Vehicles

EXPORTS

- Fruits and nuts
- Electrical machinery
- Meats
- Foodstuffs
- Wine and spirits
- Dairy products

MAIN CHANNEL DEPTH
50'



Port of Oakland



7 PORT OF VIRGINIA

PORTOFVIRGINIA.COM

TRADE DATA

2014 TOTAL TEUs: 2,393,038

YEAR-OVER-YEAR GROWTH: 7.6%

INBOUND: 1,017,879 TEUs

OUTBOUND: 1,034,526 TEUs

EMPTIES: 340,633 TEUs

MAIN CHANNEL DEPTH
50-55'

TRADE PARTNERS

- China
- Germany
- Brazil
- Belgium
- United Kingdom
- Netherlands
- India
- Italy
- Turkey

IMPORTS

- Mineral fuel and oil
- Grain, seeds, fruit
- Wood and wood pulp
- Food waste and animal feed

EXPORTS

- Machinery
- Furniture
- Salt, sulphur, earth, and stone
- Mineral fuel and oil
- Beverages
- Wood

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BOLD STEP

The ports of Seattle and Tacoma have combined their strengths and resources.

3rd largest gateway in North America. Ranked #1 for ease of doing business.


THE NORTHWEST
SEAPORT ALLIANCE

8 THE PORT OF HOUSTON AUTHORITY

PORTOFHOUSTON.COM

TRADE DATA

2014 TOTAL TEUs: 1,958,251
YEAR-OVER-YEAR GROWTH: 0.5%
INBOUND: 736,104 TEUs
OUTBOUND: 857,913 TEUs
EMPTIES: 364,234 TEUs

TRADE PARTNERS

- Brazil
- China
- India
- The Netherlands
- Turkey
- Germany
- Petroleum and petroleum products
- Stone, plaster, and cement

EXPORTS

- Plastic
- Petroleum and petroleum products
- Machinery
- Organic chemicals
- Miscellaneous chemical products

IMPORTS

- Iron/steel products
- Machinery
- Beverages
- Organic chemicals

MAIN CHANNEL DEPTH
45'



9 PORT OF CHARLESTON

PORT-OF-CHARLESTON.COM

TRADE DATA

2014 TOTAL TEUs: 1,791,977
YEAR-OVER-YEAR GROWTH: 11.9%
INBOUND: 855,690 TEUs
OUTBOUND: 936,287 TEUs

MAIN CHANNEL DEPTH
47'

TRADE PARTNERS

- Germany
- China
- India
- United Kingdom
- France
- Japan
- The Netherlands
- Belgium

IMPORTS

- Furniture
- Auto parts
- Fabrics
- Raw cotton
- General cargo

EXPORTS

- Paper and paperboard
- Wood pulp
- Auto parts
- Lumber
- Fabrics
- Raw cotton

10 PORT OF SAN JUAN, PUERTO RICO

PRPA.PR.GOV

TRADE DATA

2014 TOTAL TEUs: 1,319,961

YEAR-OVER-YEAR GROWTH: 3.9%

MAIN CHANNEL DEPTH
42'

TRADE PARTNERS

- United States
- Netherlands
- Dominican Republic
- United Kingdom
- Ireland
- Japan

- Fish
- Petroleum products

EXPORTS

- Chemicals
- Electronics
- Apparel
- Canned tuna
- Rum
- Beverage concentrates
- Medical equipment

IMPORTS

- Chemicals
- Machinery and equipment
- Clothing
- Food





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PORTMIAMI



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2015 SHIPPING LINES DIRECTORY

Bigger and better is the order of the day as shipping lines take delivery of container ships with ever-larger capacity and sustainable upgrades. But with some forecasters predicting that fleet capacity will outstrip industry growth, today's ocean carriers find that modernizing vessels is just the first port of call.

Indeed, sailing to profitability involves forming shipping alliances, enhancing service routes, and deploying innovative web tools for shippers. *Inbound Logistics'* 2015 Shipping Lines Directory dives into the latest service enhancements and innovations offered by some of the industry's major ocean carriers.

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The ports of **Seattle and Tacoma** have combined their strengths and resources.
3rd largest gateway in North America. Ranked #1 for ease of doing business.



2015 SHIPPING LINES DIRECTORY

Atlantic Container Line (ACL)

800-ACL-1235 | www.ACLcargo.com | www.nextgenerationconro.com

PARENT COMPANY: Grimaldi Group of Naples, Italy

Since 1967, ACL has been a specialized transatlantic carrier of containers, project and oversized cargo, heavy equipment, and vehicles with the world's largest combination roll-on/roll-off (RoRo) containerships (CONROs). Headquartered in Westfield, N.J., with offices throughout Europe and North America, ACL offers five transatlantic sailings each week and handles the Grimaldi Lines' service between the United States and West Africa, as well as the Grimaldi EuroMed service between North America and the Mediterranean. The company also offers service for non-containerized cargo from North America to the Middle East, South Africa, Australia, and Asia.



WEB TOOLS: Booking and rate requests, express documentation.

FLEET SIZE: Five vessels operate in the core North Atlantic service; additional vessels are time-chartered to the Grimaldi Group.

WHAT'S NEW: ACL replaced its fleet of G-3 vessels with five new G-4 multi-purpose CONRO vessels. The G-4s incorporate a new vessel design, and expand ACL's capacity to handle containers, vehicles, oversized cargo, breakbulk, and project cargo.



APL

800-999-7733 | www.apl.com | www.nol.com.sg

PARENT COMPANY: NOL Group

SISTER COMPANY: APL Logistics

APL offers more than 90 weekly services that cover 165 ports, and provides container transportation and value-added supply chain management services internationally, including intermodal operations with information technology, equipment, and e-commerce. APL helps shippers grow their business by offering competitive transit times and reliable service. APL is committed to sustainable global trade.

WEB TOOLS: Electronic cargo booking and tracking; electronic bills of lading; connection with truckers via the Internet and mobile devices, enabling cargo pickup and delivery management.

FLEET SIZE: 90 vessels.

CUSTOMER AWARDS: Best Partners of 2015, Sony.

WHAT'S NEW: APL launched Eagle Express, a weekly U.S.-flagged service that connects key markets in North Asia with the U.S. West Coast, as well as serves the U.S. inland regions via rail. New fleet additions incorporate environmentally friendly technology, such as emission-reducing engines.

Bahri

410-625-7000 | www.bahri.sa

PARENT COMPANY: The National Shipping Company of Saudi Arabia (Bahri)

Formed in 1978, The National Shipping Company of Saudi Arabia (Bahri), Saudi Arabia's national carrier, offers ocean transportation services to meet shippers' changing needs. Specializing in project cargo, breakbulk, RoRo, automobiles, and containers, Bahri connects economies to foster world trade. Bahri owns and operates 32 Very Large Crude Carriers (VLCCs), including one VLCC designated as a floating storage unit, four Medium Range (MR) vessels, and one Aframax.

FLEET SIZE: 74 vessels.

WHAT'S NEW: The company signed a contract with Hyundai Samho Heavy Industries to build 10 VLCCs, which will be delivered during 2017 and 2018.

China Shipping

888-712-7811 | www.chinashippingna.com

PARENT COMPANY: China Shipping Group Company

China Shipping offers container transportation and related services including storage, transshipment, customs manifest filing, and intermodal on-carriage. Its 724,000-TEU fleet provides containerized freight transportation to 12 China base ports and most river ports along the Yangtze River, the Pearl River, and their branches. More than 40 international routes round out the liner's current service profile.

WEB TOOLS: Tracking/tracing, electronic data interchange (EDI), e-brochure, sailing schedules.

FLEET SIZE: 156 container vessels.

CUSTOMER AWARDS: 2014 Ocean Carrier of the Year, Toys "R" Us.

CMA CGM

757-961-2100 | www.cma-cgm.com

LOGISTICS DIVISION: CMA CGM Logistics

CMA CGM, founded in 1978 by Jacques R. Saadé, provides regular service to 400 ports on more than 170 main shipping lines around the world. With a presence on all continents, and in 150 countries through its network of 650 agencies, CMA CGM employs 18,000 people and transports 10.5 million TEUs annually. The group offers a complete range of activities, including transport by sea, river, and rail. It also operates facilities in port, as well as logistics on land, to guarantee door-to-door services.

WEB TOOLS: Interactive schedules; routing finder, including line services and voyage finder; quotation requests; tariffs; container tracking; bill of lading printing (draft, waybill, original bill of lading); and shipment details. Container tracking is available from a personal computer, laptop, tablet, or mobile device for virtual accessibility from any device or location.

FLEET SIZE: 467 vessels. As of 2015, the CMA CGM Group fleet numbers 14 giant containerships with capacities topping 12,700 TEUs. The fleet's flagship is the CMA CGM *Jules Verne* (16,000 TEUs).

CUSTOMER AWARDS: 2014 Ocean Carrier of the Year Award, DHL Global Forwarding.

WHAT'S NEW: In 2015, CMA CGM deployed an upgraded transportation service to Morocco, specifically designed for citrus fruits and vegetables export, with five maritime routes connecting the country to key consumption areas (Russia, Northern Europe, North America, the Middle East, and Africa).



COSCO Container Lines Americas

866-830-2550 | www.cosco-usa.com

PARENT COMPANY: China Ocean Shipping Company (COSCO)

COSCO maintains 85 representative offices in 49 countries around the world, and agencies in 1,000 cities in 160 countries. Cargo handling capabilities include 20-foot and 40-foot dry containers, refrigerated containers, flat-racks, open tops, high cube, and other specialized equipment.

WEB TOOLS: Automated 24/7 cargo tracking service, complete listing of services and schedules.

FLEET SIZE: 117 vessels.

WHAT'S NEW: Scheduling additions and revisions, and equipment improvements have resulted in faster transit times.



Crowley Liner Services

800-CROWLEY | www.crowley.com

PARENT COMPANY: Crowley Maritime Corporation

SUBSIDIARY COMPANY: Customized Brokers, Jensen Maritime, Ardent

LOGISTICS DIVISION: Crowley Logistics

Crowley Maritime Corporation, founded in 1892, provides worldwide marine solutions, and energy and logistics services. As a leading ocean cargo carrier between the United States, Puerto Rico, the Caribbean, and Central America, Crowley offers frequent sailings and liner shipping services including:



2015 SHIPPING LINES DIRECTORY

containerized, refrigerated, and breakbulk shipping; specialized apparel services; liquefied natural gas (LNG) transport and delivery; and over-dimensional and vehicle/rolling stock transportation. The company's fleet of containers, trailers, and other intermodal components is available for cargo transport throughout the transportation cycle.

WEB TOOLS: Shipment tracking, sailing schedules, tariff rate retrieval, inland rate tables, online booking requests, online freight payment, and live customer service chat support.

FLEET SIZE: More than 200 vessels.

CUSTOMER AWARDS: Top Line Haul Performance, Ford Outstanding Customer Service, Payless ShoeSource International Partnership, Dana Corporation Outstanding Supplier, Marathon Petroleum Elite Vessel Toyota Logistics Excellence, Sears Partner in Progress.

WHAT'S NEW: Crowley's two new LNG-powered CONRO ships, *El Coquí* and *Taino*, are on schedule for 2017 delivery. The 2,400-TEU ships can carry several hundred automobiles in enclosed, weather-tight car decking.

Evergreen Line

201-761-3000 | www.evergreen-line.com

PARENT COMPANY: Evergreen Group

LOGISTICS DIVISION: Evergreen Shipping Agency (America)

Taiwan-based Evergreen was founded in 1968 by Group Chairman Dr. Yung-fa Chang, and commenced full container liner services in 1975. It has developed into a global carrier, operating an 850,000-TEU-capacity fleet and serving six continents.

WEB TOOLS: Integrated e-commerce services via Evergreen's ShipmentLink portal; enhanced e-reports with functions such as event-driven notification, tracking reports, and statistics to help manage and monitor shipments.

FLEET SIZE: 190 vessels.

CUSTOMER AWARDS: 2015 E-Commerce Excellence Award, LOG-NET.

Hamburg Süd

973-775-5300 | www.hamburgsud.com

PARENT COMPANY: The Oetker Group

Hamburg Süd specializes in containerized temperature-sensitive cargo shipping. Company services link North America, South America, Europe, the Mediterranean, Asia, India, Pakistan, and Australia/New Zealand.

WEB TOOLS: Cargo booking. Shippers access track-and-trace information, and timetables through an app.

FLEET SIZE: 174 vessels.

CUSTOMER AWARDS: Supplier Award 2015, Pirelli & C.S.P.A.

Hanjin Shipping

201-291-4600 | www.hanjin.com

PARENT COMPANY: Hanjin Shipping Holdings

Korean container carrier Hanjin Shipping operates 60 liner and tramper services around the globe, transporting more than 100 million tons of cargo annually. With 5,800 employees in 60 countries and 230 branch offices, Hanjin Shipping is building its global logistics network, which is also supported by the company's 12 dedicated terminals at the world's major hub ports and six inland logistics bases.

WEB TOOLS: Vessel and port schedules, booking tools, cargo tracking, reporting, rate and tariff information, supply chain carbon calculator.

FLEET SIZE: 200 vessels.

Hapag-Lloyd

732-562-1800 | www.hapag-lloyd.com

PARENT COMPANY: CSAV, City of Hamburg, Kühne Maritime, TUI, Signal Iduna, HSH Nordbank, an investor pool led by M.M.Warburg & Co., and HanseMerkur

Hapag-Lloyd connects all major ports worldwide via more than 128 liner services, including U.S. flag services and cabotage connections within South America. The carrier operates 349 offices in 116 countries, and offers a container stock of more than 1.6 million TEUs of all types, including one of the largest reefer fleets in the industry.

WEB TOOLS: Mobile/smartphone app for iOS and Android with various service options: point-to-point schedule; schedule overview, download and subscription; tariffs, freight rates, inland rates, essential terms and local charges; booking request; shipment overview listing; shipping instruction; sea waybill of lading download; detention and demurrage rules and regulations; track and trace by booking, container, or bill of lading number; import overview with customs information; invoice copy download.

FLEET SIZE: 188 vessels.



CUSTOMER AWARDS: Global Ocean Freight Carrier Survey 2014 (Rank 2), Panalpina; Global Ocean Carrier of the Year Award 2014 (Silver), Hellmann Worldwide Logistics; Hanse Globe

Award for Sustainable Logistics; Ocean Carrier of the Year 2014, Schenker; CN EcoConnexions Partnership Award 2014, CN Rail.

WHAT'S NEW: After the integration of CSAV's container business, which was completed in summer 2015, Hapag-Lloyd is among the market leaders on the North Atlantic and Latin American trades, and one of the largest reefer carriers in the industry.

Hyundai Merchant Marine (HMM)

877-749-8632 | www.hmm21.com

With a global network of supply chain services that encompasses more than 50 sea routes and more than 100 ports of call, Hyundai Merchant Marine strategically collaborates with ocean transportation shippers. Pursuing innovation and service expansion, HMM provides customized supply chain solutions for dry, refrigerated, and other specialized cargo.



WEB TOOLS: Track-and-trace monitoring system; optimal routing guide; personalized customer reports; e-booking; e-bill of lading (view/print); vessel schedules; EDI solutions; HMM Shiptrack mobile app.

FLEET SIZE: 138 vessels.

CUSTOMER AWARDS: 2015 Supply Chain Partner of the Year, Michaels Stores.

WHAT'S NEW: In 2016, HMM's expansion plans include new ports/routes, and upsizing its fleet with six new 10,000-TEU ships scheduled for delivery.

Intermarine

800-229-8701 | www.intermarineusa.com

PARENT COMPANY: Intermarine LLC

Houston-based Intermarine provides worldwide ocean transport and inland heavy-haul services for breakbulk, specialized project, and heavy-lift cargo. The company operates offices worldwide. Founded in 1990, the company, through its subsidiaries and worldwide network of 20 offices, controls an international fleet with lifting capacity up to 900 metric tons. Intermarine provides ocean transportation and marine logistics services with regular sailings in the Americas, West Africa, Europe, Asia, and the Middle East, plus inducement voyages to Australia and other international ports.

WEB TOOLS: Rate quotes, weekly sailing schedules.

FLEET SIZE: More than 50 vessels.

WHAT'S NEW: Intermarine is adding six Ecolift F900 vessels to its Fleet of the Future. The 13,300-DWT vessels feature two cranes with a combined lifting capacity of up to 900 metric tons. Delivery of the vessels from the Hudong and Wencong shipyards in China will begin in 2017.

"K" Line America

804-560-3600 | www.kline.com

PARENT COMPANY: Kawasaki Kisen Kaisha Ltd.

"K" Line containership services transport a diverse range of products, from general consumer goods to parts and raw materials. "K" Line offers worldwide containership services through its four hubs on three continents. "K" Line has established alliances with shipping companies in China, Taiwan, and South Korea, and operates main East-West routes between Asia and North America, Asia and Europe, and Europe and North America. In addition, it offers intra-Asian routes covering the Middle East and the Indian subcontinent, and the South-North route linking South America, Australia, and Africa with Asia and other regions.

WEB TOOLS: Global route planner.

FLEET SIZE: 662 vessels.

CUSTOMER AWARDS: 2014 Vessel Speed Reduction Award, Port of Los Angeles; 2014 Green Flag Award, Port of Long Beach.

WHAT'S NEW: Five 14,000-TEU newly built Ultra-Large Container Vessels (ULCVs) launch in 2015. An additional five vessels are scheduled for delivery in 2018, bringing "K" Line's mega-size container fleet to a total of 10 vessels.

Maersk Line

800-321-8807 | www.maerskline.com

PARENT COMPANY: Maersk Group

SISTER COMPANY: Safmarine and SeaLand. Maersk Line is the holding company for MCC Transport (Intra-Asia), Seago Line (Intra-Europe), and Mercosul (Brazil).

Founded in 1904, Maersk Line is a global transportation partner that strengthens shippers' supply chains. Maersk Line's people are experienced and knowledgeable. The carrier is committed to schedule reliability and providing resources and consistent service coverage throughout the world.

WEB TOOLS: Booking, shipping instructions; My Shipment; ETA notification; MyFinance with eInvoices, eDispute, eStatement, and ePayment; eRates; bill of lading; sailing schedules; and track and trace.

FLEET SIZE: 619 vessels.

CUSTOMER AWARDS: PVH 2014 Ocean Carrier of the Year Award; 2015 Target All-Star Award.

2015 SHIPPING LINES DIRECTORY

WHAT'S NEW: In 2015, Maersk Line began a vessel-sharing agreement, known as 2M, with MSC. This cooperation is the backbone for Maersk Line's East-West network, which offers fast transit times and improved port coverage.

Matson Navigation Company

800-4MATSON | www.matson.com

PARENT COMPANY: Matson Inc.

LOGISTICS DIVISION: Matson Logistics

Matson's transportation offerings span the globe from Shanghai to Savannah, and encompass everything from providing services to the economies of Hawaii, Guam, Micronesia, and Alaska to offering a premium, expedited service from China to Southern California.

WEB TOOLS: Booking, tracking, billing, account balances, container tracking, EDI.

FLEET SIZE: 21 vessels.

WHAT'S NEW: Matson now serves Alaska with a twice-weekly service between Tacoma, Anchorage, and Kodiak, as well as weekly service between Tacoma and Dutch Harbor. Matson's new China-Long Beach Express offers weekly service from Xiamen, Ningbo, and Shanghai to Southern California and other points in North America.

MOL (America)

800-449-7575 | www.MOLpower.com | CountOnMOL.com

PARENT COMPANY: MOL Ltd. (Mitsui O.S.K. Lines)

CONSOLIDATION DIVISION: MOL Consolidation Services Ltd.

LOGISTICS DIVISION: MOL Logistics (U.S.A.) Inc.

MOL (America) Inc., MOL's wholly owned liner subsidiary in North America, employs approximately 400 transportation professionals in 12 sales offices throughout the United States.

WEB TOOLS: KPI reporting; online booking requests and shipping instructions; bill of lading searching, viewing, and printing; global shipment tracking; reports; sailing schedules.

FLEET SIZE: 947 vessels, including 118 containerships.

WHAT'S NEW: MOL started testing a condition-based engine monitoring system called CMAXS e-GICSX (electronic Global Internet Customer Support neXt) aboard the recently delivered methanol carrier *MAYARO*. The system relies on early detection of abnormalities in the electronically controlled engine to ensure preventive maintenance and reduce lifecycle costs.

MSC Mediterranean Shipping Co. (USA)

212-764-4800 | www.msc.com

Founded in 1970, MSC is a privately owned global organization operating a network of more than 480 offices in 150 countries, employing a team of more than 24,000 dedicated individuals. MSC has an established fleet of 465 container vessels with

an intake capacity of approximately 2.6 million TEUs. Its global sailing schedules cover 200 routes, calling at 315 ports, allowing MSC to deliver cargo almost anywhere in the world.

FLEET SIZE: 465 container vessels.

NYK Line

201-330-3000 | www.nykline.com

PARENT COMPANY: Nippon Yusen Kabushiki Kaisha

LOGISTICS DIVISION: Yusen Logistics Co. Ltd. (YLK)

Founded in 1885, Nippon Yusen Kabushiki Kaisha (NYK Line) is a comprehensive global logistics group offering ocean, land, and air transportation services that draw on fleets of specialized vessels, trucks, warehouses, and aircraft.

WEB TOOLS: Bill of lading processing, bookings, customized reports, rate inquiries, and shipment alerts and information.

FLEET SIZE: 846 major ocean vessels, including 126 containerships (includes semi-containerships).

WHAT'S NEW: NYK expanded its network linking Japan, Thailand, and Vietnam. The company will rename the previous service Phoenix 1, and add a new Phoenix 2 service to provide a more stable transportation network.

OOCL

888-388-OOCL | www.oocl.com

PARENT COMPANY: Orient Overseas (International) Ltd.

LOGISTICS DIVISION: OOCL Logistics Inc.

OOCL provides fully integrated logistics and containerized transportation services, with a network that encompasses Asia, Europe, North America, and Australasia.



WEB TOOLS: Advanced visibility and exception management.

FLEET SIZE: 100 vessels.

CUSTOMER AWARDS: Ranked the top carrier for 2014 in the Ocean Performance Survey conducted by the Agriculture Transportation Coalition.

WHAT'S NEW: In 2015, OOCL took delivery of an 8,888-TEU containership, the OOCL *Genoa*, the latest addition to its fleet.

Rickmers-Linie

281-453-7500 | www.rickmers-linie.com

PARENT COMPANY: Rickmers Group, Hamburg

Rickmers-Linie is a leading provider of worldwide liner services for the transportation of non-containerized project cargoes and heavy lifts. The Round-the-World Pearl String service with fortnightly departures connects Europe with Asia, Asia with the United States, and the United States with Europe and Asia, and is complemented by regular liner services from Europe to the Middle East-India, and the Westbound Round-the-World service connecting Asia, South America, and North America.

WEB TOOLS: Interactive schedule, schedule per vessel, surcharge bulletin, rate inquiry.

FLEET SIZE: 11 vessels (core fleet in 2015).

WHAT'S NEW: Rickmers-Linie and Swire Shipping launched a carrier partnership that connects Swire Shipping's breakbulk and project cargoes in India and the Middle East, through Rickmers-Linie's Middle East and India service, to its network in Australia, New Zealand, and the South Pacific.



Safmarine

866-866-4723 | www.safmarine.com

PARENT COMPANY: The Maersk Group

Safmarine specializes in moving cargo between North America and East, South, and West Africa, the Middle East, Indian Subcontinent, and the Mediterranean, with additional services available between other global regions. Access to a vast network delivers personalized transportation services for dry, refrigerated, and special project cargo.

WEB TOOLS: Sailing schedules; e-booking; e-shipping instructions; bill of lading viewing/amendments/printing; track-and-trace; alerts and notifications; electronic rates, invoices, disputes, statements and payments; arrival notices.

CUSTOMER AWARDS: Best Shipping Line Award, Customer Care category, PIFFA Excellence Awards 2015.

TOTE Maritime

904-855-1260 | www.totemaritime.com

PARENT COMPANY: Saltchuk

Operating in the Jones Act trade since 1975, TOTE companies route cargo from anywhere in North America to Puerto Rico and Alaska. TOTE Maritime companies offer services to remote areas of the United States. Twice-weekly service to its dedicated trade routes ensures consistent and cost-effective cargo transport for U.S. shippers in the non-contiguous states. TOTE plans to convert its maritime fleet to operate on liquefied natural gas (LNG). TOTE Maritime Alaska, already operating the newest ships in the U.S. domestic fleet, plans to convert its engines to operate on natural gas.

FLEET SIZE: Three vessels.

CUSTOMER AWARDS: Lloyd's List Award for Ocean-Going Ship Operator of the Year (North America) for 2015.

WHAT'S NEW: In 2015, TOTE launched the *Isla Bella*, the world's first LNG-powered containership. In partnership with General Dynamics NASSCO, TOTE also marked the completion of the first of two Marlin Class containerships. The switch to LNG reduces CO₂ emissions by 72 percent in the Puerto Rico trade.

Trailer Bridge

904-751-7100 | www.trailerbridge.com

LOGISTICS DIVISION: Trailer Bridge Logistics

As a U.S. flag (Jones Act) carrier, Trailer Bridge provides multiple weekly sailings between Jacksonville, Fla., and San Juan, Puerto Rico. Trailer Bridge also provides weekly sailings between Jacksonville, Fla., and Puerto Plata, Dominican Republic. Over the past several years, the company began to incorporate its equipment, information systems, and service into the domestic market and serve Fortune 500 companies via Trailer Bridge Logistics. With its company-owned assets, owner operators, and partner carriers, Trailer Bridge provides truckload, intermodal, expedited, and warehousing services.

WEB TOOLS: Shipment tracking, customizable reports, booking, rate requests, sailing schedule.

FLEET SIZE: Seven vessels.

WHAT'S NEW: Celebrating 25 years of service to Puerto Rico in 2016 by continuing to expand its ocean service offerings, warehousing capabilities, and domestic transportation services.

United Arab Shipping Company (UASC)

908-272-0050 | www.uasc.net

UASC is a dry cargo carrier focused on serving the Arabian Gulf. The company offers a wide range of services to the Arabian Gulf/Red Sea and Indian subcontinent.

WEB TOOLS: Shipment tracking, bill of lading, sailing schedules.

FLEET SIZE: 62 vessels.



2015 SHIPPING LINES DIRECTORY

WHAT'S NEW: UASC launched two new West Africa services to meet growing demand in the West African market. Additionally, UASC has 17 new vessels on order: six 18,800-TEU and 11 15,000-TEU containerships.

Yang Ming (America) Corp.

201-420-5800 | www.yangming.com

PARENT COMPANY: Yang Ming Marine Transport Corporation

SUBSIDIARY COMPANY: Kuang Ming Shipping Corp./Yes Logistics Corp./Kao Ming Container Terminal Corp.

LOGISTICS DIVISION: Yes Logistics Corp./Jing Ming Transport Co., Ltd.

Yang Ming Marine Transport Corporation (Yang Ming) was established in 1972. Since that time, staff members have observed its core value of “teamwork, innovation, honesty, and pragmatism” in enhancing its transportation expertise and service quality. Yang Ming is dedicated to providing global and sophisticated marine transportation services.

WEB TOOLS: Schedule; point-to-point search; subscription; booking; bill of lading processing; account balance; vessel tracking; search by vessel, port, and service; track and trace; tariff; demurrage and detention; and EDI.

FLEET SIZE: 101 vessels.

CUSTOMER AWARDS: Multiple Carrier of the Year Awards received from major import retailers and export manufacturers in the United States.

WHAT'S NEW: Yang Ming launched New SA1/SA3 and SA2 services in 2015 to provide Asia to/from East Coast South America and West Coast South America market coverage.

ZIM Integrated Shipping Services

757-228-1300 | www.zim.com

Established in 1945, ZIM's global shipping services cover all major international trade routes and are complemented by regional shipping lines, connected by 10 major hubs. ZIM operates approximately 547,000-TEU containers of various types. TEUs carried in 2014 totaled more than 2.3 million.

WEB TOOLS: Quote submissions, cargo tracing, vendor portals, and U.S. tracing status.

FLEET SIZE: 89 vessels.

WHAT'S NEW: ZIM enhanced its East Med-North Europe service. The new rotation introduces fast transit times from North European ports to Ashdod, as well as shortened transit times from Ashdod to North Europe.



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GREAT LOGISTICS SITES: Prime Destinations, Unmistakable Results



The pursuit of perfection may seem an impossible goal. But, with the right combination of key elements, four regions in the United States have achieved logistics greatness.

Let's face it, the term "great" is relative. What you perceive as great may not be recognized in the same light by others, even if they work in your industry and have backgrounds similar to yours.

But this perception of greatness changes when solid evidence proves it. Within the logistics field, professionals tend to view "great" sites as those in which they realize the highest profits — whether through lower taxes, business incentives, profit margins, or the aggregate of established and potential customers.

However, four sites in particular — central and southern Indiana, Los Angeles County, northern Illinois,

and southwest Missouri — have proven that they have what it takes to become and, more importantly, remain a great logistics site.

From a rise in manufacturing employment to an upturn in clientele, each of these sites proves that the saying "location, location, location" should not be overlooked, and a combination of three transportation modes — air, land, and sea — are vital.

Central and Southern Indiana: The Heart of the East



As a generation and transmission cooperative, Bloomington, Ind.-based Hoosier Energy provides wholesale electric power and services to nearly 300,000 customers — through its 18 distribution cooperative members — in central and southern Indiana, and southeastern Illinois.

Hoosier's customer base continues to grow because it offers stable rates and reliable services in the midst of a constantly evolving national economy. That growth is also enabled by the four key pillars of strength — highways, railroads, air hubs, and ports — that central and southern Indiana's transportation infrastructure offers.

"Hoosier Energy's service territory is located in the true heart of the eastern United States, placing 75 percent of the population within a single day's drive," says Harold Gutzwiller, manager of economic development and key accounts. "And, Indiana and Kentucky are building two additional interstate bridges across the Ohio River to better link the region's integrated economy."

Two Tier 1 railroads — Norfolk Southern and CSX — along with a variety of shortline railroads, are also present in nearby metro areas including Indianapolis and Cincinnati, providing distributors an opportunity to bypass rail congestion in other parts of the Midwest. In addition, three airfreight hubs — FedEx in Indianapolis, UPS Worldport in Louisville, and DHL in Cincinnati — are all within a short flight from central and southern Indiana.

Industrial and logistics customers are also drawn to the port facilities available along the Ohio River's Inland Waterway system, particularly in Louisville and Cincinnati.

Furthermore, each metro area offers a large, skilled workforce. Within the central and southern Indiana area itself, logistics professionals have ample opportunities to further their educations and expand their skillsets.

In addition to enrolling in college courses, workers can acquire on-the-job training at the various manufacturers based in the region, including Cummins, Honda, Subaru, and Toyota.

Another primary benefit of central and southern Indiana is the region's pro-business regulatory climate; in particular, it processes permits quickly, and

Toyota increased employment at its Indiana assembly plant to 5,000 workers.

keeps tax rates lower than the national average.

"Indiana has placed a cap on property taxes, so that businesses know that their tax rates will remain low," Gutzwiller says. "Businesses also benefit from the state's workers' compensation insurance rate, which is currently one of the three lowest in the United States. And manufacturers receive a sales tax exemption on each item used during the production of goods."

While offering stable rates and reliable services, Hoosier Energy is also focused on saving other valuable resources in addition to money — renewable energy.

"Over the past decade, the cooperative has made steady progress in diversifying its fuel mix," Gutzwiller says. "As a result, it now has a voluntary goal of achieving 10-percent renewable energy sources by the end of 2015. This will result in a fuel mix of 60 percent coal-fired baseload capacity, along with natural gas capacity and 10 percent renewables."

This ability to exponentially reduce resources — whether time, money, or renewable energy — separates the central and southern Indiana region from other logistics sites. "The best logistics sites bring together not just the physical attributes of complete infrastructure, but they also have the intangible advantage of tailored regulations that meet logistics demands," says Jeff Quyle, Hoosier Energy's economic development coordinator. "Prime sites should also have a labor force cluster that relies on specialized logistics training programs, and a culture of working to expedite transit.

"Central and southern Indiana bring all these attributes together very well, which is why logistics firms are steadily growing throughout the region, and will continue to do so," he adds.





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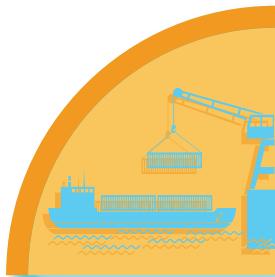
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Los Angeles County: The Center of West Coast Trade

The glitz. The glamour. The sunshine. When people discuss southern California, they inevitably focus on the entertainment mecca of Hollywood. But to logistics professionals around the world, Los Angeles County is also a prime destination for the transportation of goods and services.

After all, the twin ports of Los Angeles and Long Beach — the largest port complex in the United States — offer unparalleled access to global markets. And Carson, Calif.-based Watson Land Company, a developer, manager, and owner of industrial distribution buildings within master-planned centers, is located less than 20 minutes from this complex.

“Los Angeles County is ideal for third-party logistics (3PL) providers and distributors, as their efficiencies improve immediately when they utilize these ports,” says Lance Ryan, vice president and COO of Watson Land Company. “The complex not only increases their daily truck turns, it also provides much lower drayage costs.”

As the second-largest metro area in the United States, Los Angeles also offers logistics professionals an extensive network of freeways, including I-5, I-10, I-110, and I-710, resulting in a one-day truck trip to most metro areas in the western United States.

“Carson’s Union Pacific Intermodal Container Transfer Facility, along with its adjacency to Los Angeles International Airport, provides shippers, distributors, and 3PLs immediate access to every transport mode,” Ryan says.

Watson initially chose its ideal location in the early 1960s, when it developed its first master-planned industrial center.

“We are uniquely positioned, with more than 11 million square feet of our portfolio located within Carson,” Ryan adds. “This designation allows industrial center customers to handle import and export containers, thus providing an opportunity for significant cost savings by consolidating shipments into fewer containers.”

To further develop, Watson Land Company chose to follow the supply chain, along with its customers, by acquiring industrial land in southern California’s Inland Empire during the early 2000s. “Since then, Watson has developed, and now owns and manages, more than six million square feet of buildings in the Inland Empire, with a land pipeline that will accommodate another four million square feet of development,” Ryan says.

As evidenced by Watson’s exponential growth, the greater Los Angeles area’s infrastructure and networks are ideal for shippers, distributors, and 3PLs, no matter which mode they require.



The twin ports of Los Angeles and Long Beach offer area companies easy access to global markets.

The 6.5-million-square-foot complex, which is now fully built out, is almost entirely located within the Port of Long Beach’s Overweight Corridor.

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Northern Illinois: A Transportation Mecca

Based in Oak Brook, Ill., a suburb of Chicago, CenterPoint Properties’ location and line of work — developing industrial real estate and transport infrastructure — are clearly compatible. Illinois ranks third in the country for transportation and material-moving occupations; and the Bureau of Labor Statistics estimates these job opportunities will increase by 12 percent by 2022.

The Chicago metro area, which has a population of approximately 9.5 million, according to Census Bureau estimates, currently employs 585,000 manufacturing workers. Within this cluster, supply chain sectors such as energy, logistics, and materials providers, have specifically experienced an upsurge in employment over the past decade, rising 16 percent between 2001 to 2011.

“Chicago’s skilled industrial labor pool is one key factor driving manufacturers and distributors to the northern Illinois region,” says Michael Murphy, chief development officer, CenterPoint Properties. “By having industrial facilities in the region, manufacturers and distributors notice two primary benefits: proximity to Chicago and other major Midwest markets including Milwaukee and Kansas City, and a trove of transportation assets.”

With access to 23 interstate highways, the greater Chicago area is a central artery that provides shippers direct, convenient access to markets throughout the Midwest. They can reach major population centers across Indiana, Missouri, Ohio, and Wisconsin, well within a one-day drive.

Northern Illinois also offers a wide range of rail assets to supply chain organizations that need long-haul shipping. Six of the seven largest Class I rail networks pass through Chicago, allowing locally based manufacturers to reach any domestic market — from Los Angeles to Houston to Newark, N.J.

O’Hare International Airport, consistently ranked as one of the

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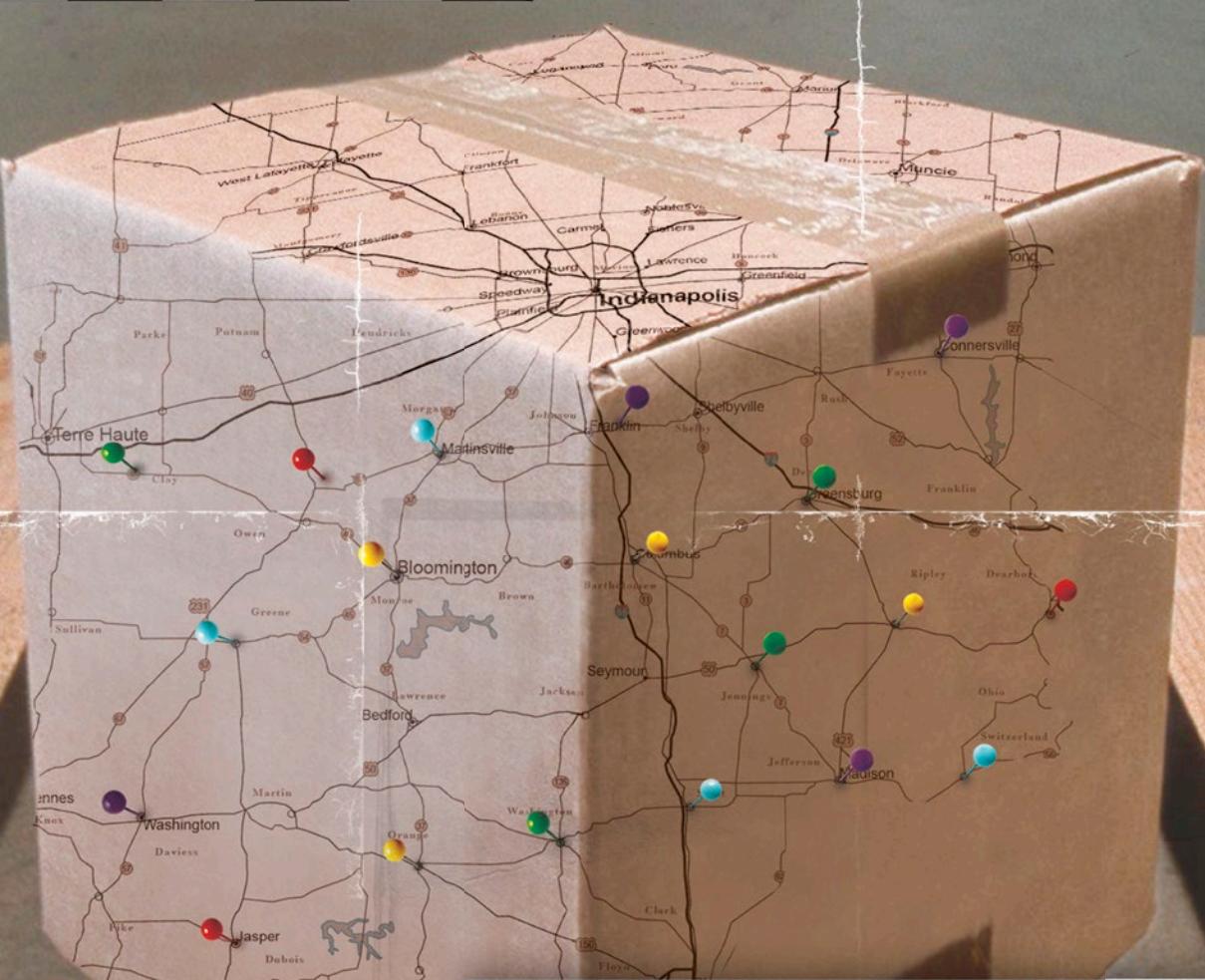
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O’Hare International Airport, consistently ranked as one of the



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CenterPoint Properties and anchored by BNSF and Union Pacific intermodal parks, features more than 6,500 acres of rail and highway-adjacent land. “Logistics firms and retailers located within the CIC realize multiple benefits, such as access to 65 percent of the country’s population within a one-day drive, in-park container and equipment storage, and low fuel and drayage costs,” Murphy says.

As a result of the area’s interstate network, rail connectivity, and inland port infrastructure, the greater Chicago area has become a supply chain nexus for manufacturers and distributors in all sectors, especially e-commerce and natural gas. “The Chicago area’s network has become a lifeline for these industries, whether their supply chains are hyperlocal or span coast to coast,” Murphy says.

As the largest institutional owner of less-than-truckload facilities in the United States, CenterPoint Properties currently serves more than 300 tenants, while also maintaining a portfolio of more than 52 million square feet of industrial property throughout the country.

“By fostering local expertise in every market we serve, we grow our national footprint and build transportation-proximate, logistically advantaged facilities that help tenants reduce operating expenses, just like we have in northern Illinois,” Murphy says.

Murphy believes the best logistics facilities are positioned in strategic markets that offer immediate access to population centers, along with an array of available transportation modes, preferably a combination of highways, railroads, ports, and airports. “Successful logistics sites should help tenants reduce operating expenses, mitigate risk, and improve relationships with customers,” he notes.

CenterPoint Intermodal Center-Joliet/Elwood, Ill., is the largest master-planned inland port in North America, strategically positioned as an ideal location for regional goods distribution.

world’s top-five busiest airports, is another critical component of the region’s transportation assets, particularly for overseas shipments. “The availability of this infrastructure, paired with local inland ports, including the CenterPoint Intermodal Center (CIC), enables manufacturers and distributors to operate more efficient and cost-effective supply chains,” Murphy says.

Located in Joliet and Elwood, the CIC, which was developed by

Disasters Happen! How you handle them is what matters.

On May 22nd, an EF-5 tornado devastated nearly 1/3 of Joplin, Missouri
7,000 homes were destroyed
More than 500 businesses were leveled and 5,000 jobs were lost
107 miles of city streets were filled with 3 million cubic yards of debris
(That’s enough debris to fill a football field end zone to end zone nearly as high as the Empire State Building)
Eleven public school facilities, including the high school, and one private school were lost

Before dawn on May 23rd, all streets were opened one lane for emergency services
Before midnight on May 24th all lanes were cleared
On May 26th the Business Recovery Center opened to help impacted businesses
More than 400 businesses have reopened their doors with more reopening every day
3,500 of the employees who “lost” their job remain on the payroll
All 3 million cubic yards of debris was removed by August 7th as scheduled
Schools started on time in temporary facilities that are the model for schools of tomorrow



For More Information
Kevin Welch, Director
Joplin Regional Partnership
320 East 4th Street | Joplin, MO 64801
417.624.4150
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Southwest Missouri: A Central Location for Distribution

The manufacturing sector clearly thrives in the greater Joplin, Mo., area, as evidenced by its employment figures; it offers nearly twice the percentage of manufacturing jobs as the rest of the United States. And those jobs

are diverse, ranging from food processing and transportation equipment to packaging and power systems.

“Manufacturers are particularly drawn to the region’s cost-effective and centralized location for distribution,” says Rob O’Brian, president of the Joplin Area Chamber of Commerce. “They have taken the opportunity to use the area’s manufacturing presence to bring in other products for distribution, along with those already made in Joplin.”

The region’s centralization is a direct result of its excellent transportation structure. In particular, I-44, which connects the Midwest to Southwest markets, and I-49, an interstate system that connects Canada to the Gulf of Mexico, cross in the region.

“As a result, it’s a convenient location for regional and nationwide distribution,” O’Brian explains. “By means of I-44 and I-49, Joplin is within an easy one-day truck transport of countless major markets, including, but not limited to, Chicago, Dallas, Kansas City, Memphis, and St. Louis.”

Of equal importance, these two interstates are bolstered by a wide array of state and federal highways that provide manufacturing employees efficient commutes to and from work, while also offering distributors and 3PLs easy access to raw materials and finished goods.

Although these highways and interstates are the primary draw for manufacturers that continue to move to the region or expand their businesses, Joplin offers access to all types of modes. Not only is Con-way Truckload headquartered in Joplin, but the metro area is also served by several Class I rail lines, as well as two shortlines, each of which interconnect in the region.

Air transport is also available. The Joplin Regional Airport offers direct service through four commercial airports, all located within a 90-minute flight, including the Dallas/Fort Worth International Airport, one of the world’s busiest.

“We are also only 100 miles from the nation’s most inland port, the Tulsa Port of Catoosa, located in Catoosa, Okla., another 90-minute ride from Joplin,” O’Brian adds. “It is also one of the largest river ports in the country.”

Joplin’s low cost of living—lower than the national average—also contributes to the area’s manufacturing popularity. And, according to O’Brian, many of the metro area’s surrounding communities are even less expensive.

“Furthermore, our surveys of area employers indicate that

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SEAPORT ALLIANCE



Southwest Missouri's interstate highway system attracts manufacturers looking for easy regional and nationwide distribution channels.

Joplin-based employees have a strong work ethic," he says. "A majority of employees are also well-trained, as educational institutions such as Vatterott College and Franklin Technology Center offer skills-training programs. Within the Joplin area alone, employees can choose from four community colleges and two state universities."

As proven by Joplin, metro areas do not need to be exceedingly large to attract logistics professionals from around the country; after all, the two-county Joplin Metropolitan Statistical Area population

is only 175,000, and the five counties surrounding the area only have another 125,000 residents. But, by offering access to all modes of transportation, Joplin has become a manufacturing hub.

"Low prices, multiple educational institutions, and easy access to large markets via interstates, highways, railways, airports, and ports, have resulted in one of the nation's most successful manufacturing job creators," O'Brian says. "And the rise in employment is expected to continue, as Joplin's central location for distribution consistently offers a diverse mix of job opportunities." ■

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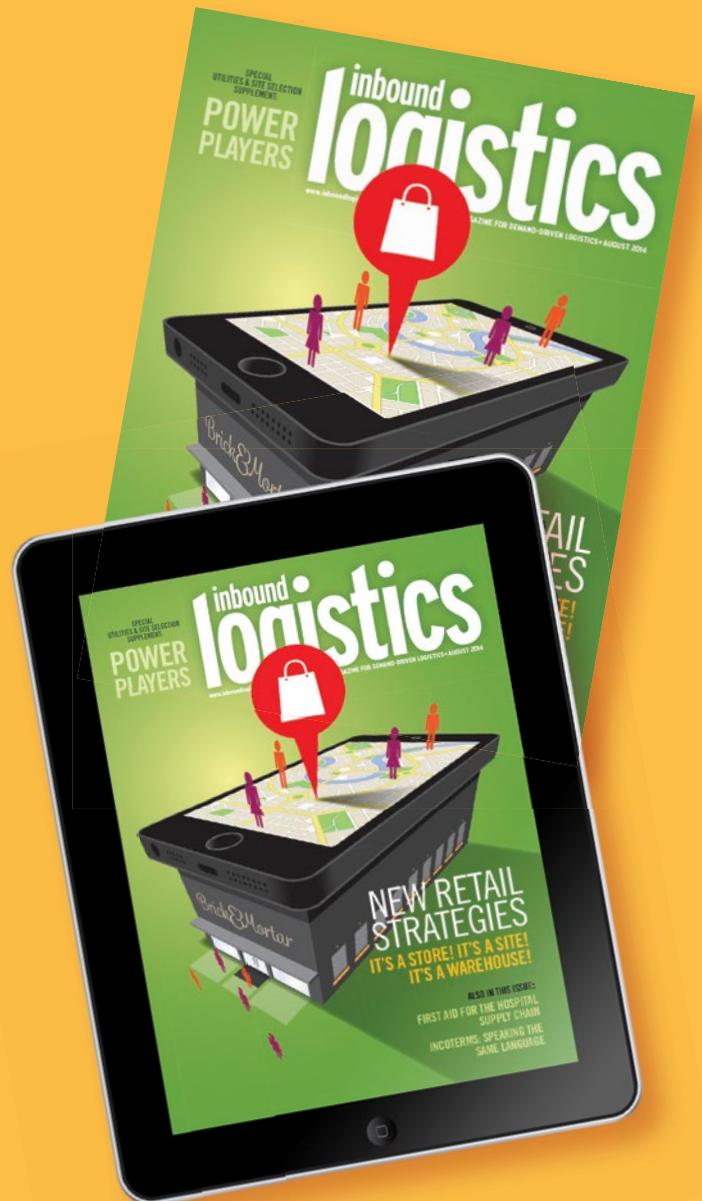
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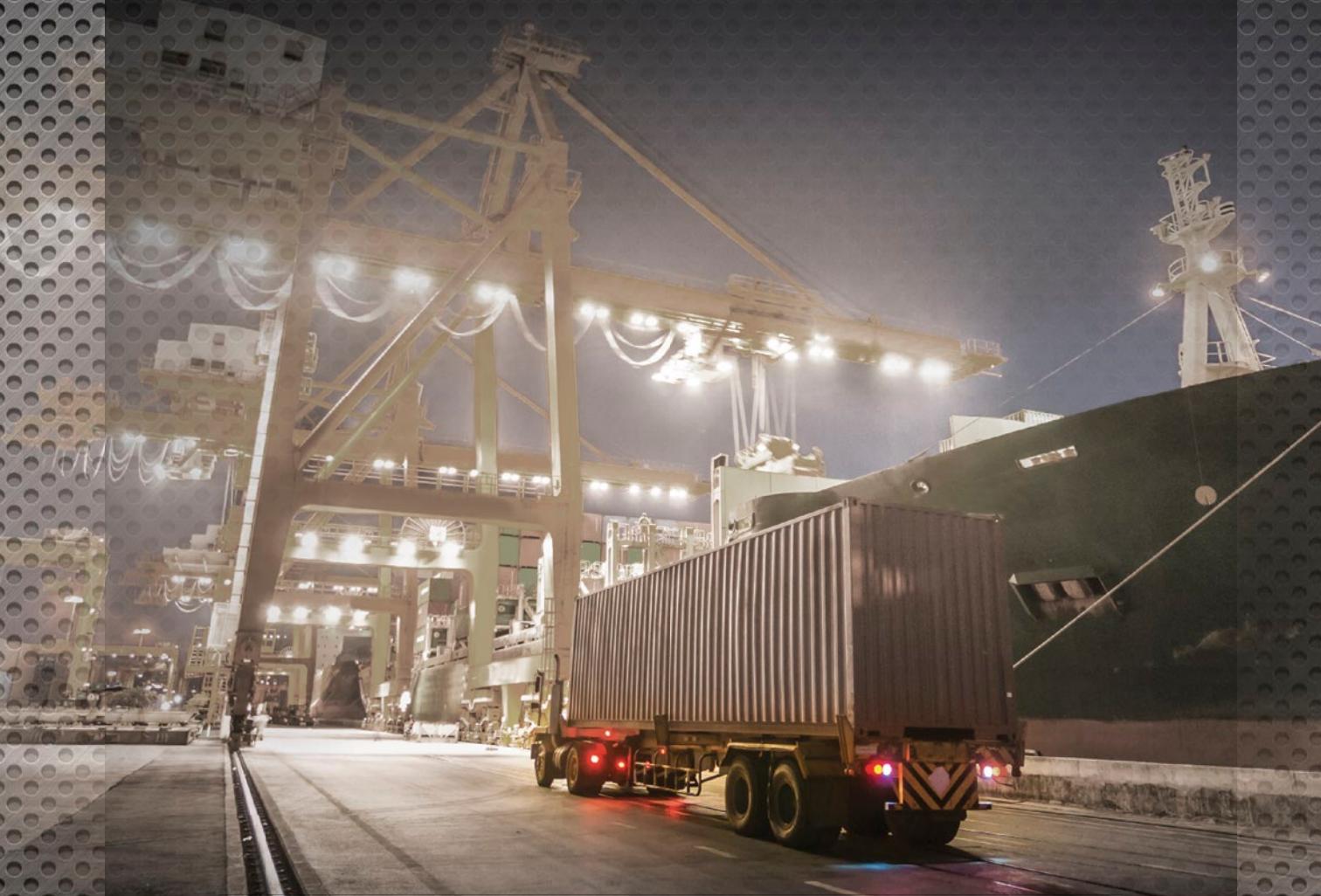
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Casebook | by Craig Guillot

The Beauty of Global Logistics

A total makeover of EM Cosmetics' global distribution process, and partnership with a consolidator, produces amazing results.

Exporting products and offering low shipping costs to international markets can be a hurdle for any company. But it's even more of a challenge for a startup brand with limited capital to establish a global distribution network.

EM Cosmetics, a new L'Oreal cosmetics brand, quickly discovered its international appeal when it entered the market in 2013. Enlisting the services of international shipping and package consolidator MyUS.com enabled the brand to grow its business by 20 percent. By handling export law compliance for the shipper, and reducing the cost and complexity of international shipping for the shopper, MyUS.com has been instrumental in helping EM Cosmetics reach its global market.

As part of L'Oreal's luxury products division, EM Cosmetics is the company's first digital-only makeup brand. It launched in August 2013 under the name of YouTube makeup artist and beauty blogger Michelle Phan. Phan has cultivated a large audience over the years, with more than 7.6 million subscribers and 1.1 billion views on her YouTube channel.

More than 50 percent of Phan's viewers come from outside the United States, so L'Oreal knew global sales would be big.

"When we launched in Phan's name, we anticipated that the brand would attract a lot of attention outside the United States," says Roseanne Fama, vice president of brand development at L'Oreal and co-creator of EM Cosmetics. "We were a small startup, but having a big name behind us gave us a way to experiment with a new makeup line."

EM Cosmetics relies heavily on reaching its market through Facebook, YouTube, and Twitter, engaging fans with makeup tutorials and tips. The brand is comprised of 25 products with more than 200 SKUs. But the small product line doesn't make exporting products any less difficult. As an experimental brand, EM Cosmetics didn't have the infrastructure or capital required to establish



distribution centers outside the United States. Setting up a distribution system in Asia and Europe would have cost at least \$250,000, Fama estimates.

EM Cosmetics started operations with distribution in the United States and Canada, but quickly discovered that 50 percent of its web traffic came from abroad. With an infrastructure that allowed it to ship only to addresses in the United States, the company left business on the table.

“We knew we were missing a big opportunity because we couldn’t ship outside the United States,” says Fama. “Catering to global customers was critical to our growth.”

Getting Product to Market

When Fama started searching for a distribution solution, she discovered that California-based cosmetics company Urban Decay had been effectively using MyUS.com for years to enable its international shipments. MyUS’s unique business model serves as a middleman between U.S. shippers and global consumers. MyUS currently serves more than 200,000 customers in 220 companies, says CEO Ramesh Bulusu.

MyUS.com works by allowing members (retail shoppers) to use a U.S.-based address at its distribution center in Sarasota, Fla. From there, shoppers can either immediately ship a package to their international address, or have it held for up to 30 days. The advantage is that consumers can consolidate multiple packages in one place before sending them abroad.

Consumers can also request to confirm the size, color, or make of the items, and to even take photos of products or scans of the merchants’ invoices. For shoppers, the consolidation can dramatically reduce shipping costs; for retailers or manufacturers, it cuts through the hassle and red tape associated with exporting.

“All purchases made by international shoppers come to our DC in Florida, where we consolidate the packages and do the necessary export paperwork to transport the product with the appropriate duties and taxes,” says Bulusu.

MyUS became the backbone of building and enabling international business. EM Cosmetics has seen its business grow by 20 percent since it opened the door to international sales in late 2013 by partnering with MyUS.

The consolidator walked EM Cosmetics through every step of the process to ensure that it had all the information needed for every item. MyUS employs a staff of 20 full-time associates and one full-time licensed customs broker to investigate and ensure full compliance with all U.S. export laws. Products destined for international

exporting, but we are,” says Brown. “We take compliance seriously and we take the burden off the retailer.”

EM Cosmetics set up a web page to guide consumers through the international shipping process. Customers in Brazil, China, Germany, and the United Kingdom can use credit cards for purchases; customers in other locations are directed to PayPal. Video and text instructions show them how to obtain a U.S. mailing address through MyUS.com.

One big benefit of MyUS is being able to reduce shipping costs by consolidat-



MyUS.com offers a package consolidation service that combines multiple packages into one, providing members significant savings on international shipping charges.

locations are packaged both for the consumer’s benefit and to provide easy access for inspections. The process was simple, Fama says, and allowed EM Cosmetics to quickly open its products to the international market.

Myriad exporting laws can vary dramatically by country and by product. It can be especially complex for cosmetics, which may contain animal products, and must present information on ingredients, potential contaminants, and testing, as well as comply with labeling requirements, says Bill Brown, director of retail sales at MyUS. And, each SKU must have its own documentation for each country.

“Retailers are not in the business of

ing packages from multiple shippers in the United States. MyUS distribution center workers open packages, and repackage all items into the smallest and most cost-effective packaging before shipping internationally. Add-on services like this don’t directly impact the shipper, but they do help boost sales by making the process easier and saving money for the consumer. EM Cosmetics has also seen evidence of friends “grouping” purchases to minimize per unit shipping costs, Fama notes.

“Consumers can save a significant amount of money because we can help reconfigure the weight, size, and volume of shipments, and ship one package,” says Bulusu.



On a typical morning, MyUS receives and logs hundreds or thousands of packages from companies such as EM Cosmetics. Products can range from cellphones or small electronic devices to sofas and pianos, says Bulusu. Trained workers open and inspect packages to ensure the right items are in the box, and that they are undamaged and in visible working condition. If they discover a problem, MyUS notifies both the customer and the U.S. retailer to return or replace the merchandise before shipping overseas. MyUS also ensures that shipments are appropriately packaged for export compliance to expedite the process and minimize Customs delays.

All milestones in the process are updated online so customers have visibility to their packages at every point. They can also choose when and which products



they'd like to ship from the DC. "Flexibility and control of the shipping request is in the consumer's hands," says Bulusu. "Once a request comes in, we ship in 24 hours and customers usually receive the shipment in two to four days."

Shipping costs are a critical part of the equation for shoppers. Domestic customers expect free shipping; for international shoppers, the cost of shipping can make or break a sale. Seventy-one percent of respondents to a 2014 Pitney Bowes global online shopping survey said price was the most important factor in purchasing online. The survey also revealed that international buyers don't like surprises and want to know the "fully landed" cost of goods with upfront information about shipping, taxes, and duties. In regard to

obstacles to completing a purchase, the survey found that high shipping costs can deter 67 percent of potential buyers.

To offset increased shipping costs, many international shoppers purchase more items to take advantage of lower per-unit shipping. Where an average order value is \$60 for domestic EM Cosmetics customers, it's near \$100 for international customers.

"We have cost-conscious customers with the incentive to increase their orders to save on shipping costs," Fama says.

MyUS fills the missing link in the international shopping chain by offering easy export and low shipping costs. It also enables transactions that otherwise might not occur. While EM Cosmetics does offer international payments, MyUS's Personal Shopper service can expedite service for retailers that don't.

"We convert customers who would otherwise not buy a product if shipping wasn't affordable," Bulusu says. ■

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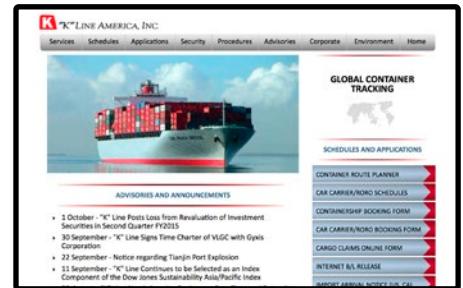
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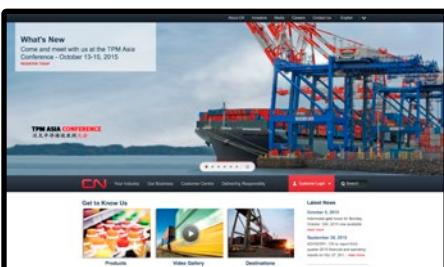
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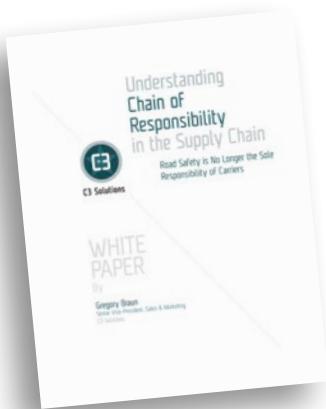
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TITLE: *Understanding Chain of Responsibility in the Supply Chain*

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SUMMARY: This whitepaper explains the concept of Chain of Responsibility (CoR), how other jurisdictions have implemented it, how it may affect your business, and what you need to do to ensure you are prepared and protected.

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SUMMARY: Inventory strategy isn't as simple as determining safety stock levels. There are many other stock considerations and interdependent factors to think about, such as capacity levels, stock location, transport costs, customer demand, and more. How can you understand the impact of all these variables on your inventory, and on your business? In this e-book, you'll learn new ways to use modeling technology to achieve holistic inventory optimization for "right-sized" inventory levels.

C.H. Robinson

TITLE: *Do "Favored Shippers" Really Receive Better Pricing and Service?*

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SUMMARY: Anecdotal evidence and some qualitative research suggests that "favored shippers" – companies for which carriers prefer to haul freight – obtain better pricing and service. But do they? In this paper, Iowa State University researchers explain how they sought to understand the voice of U.S. truckload carriers, how they quantitatively measured the effects of "favored shipper" characteristics on transportation costs, and what characteristics actually make shippers favored in the transportation marketplace.





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TITLE: *Turn Your Warehouse on its Head: Improve Productivity, Quality and Safety From the Ground Up*

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SUMMARY: This whitepaper from the experts at Penske Logistics focuses on a bottom-up approach to successfully launching an effective labor management software program. It offers actionable steps for creating the right culture, phasing in the implementation, and ensuring benchmarks are met. Additionally, it cites an industry success story and lists six steps to assessing the efficiency of your warehouse.

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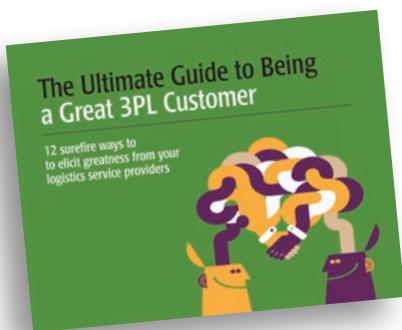
SUMMARY: FLEXE's latest survey seeks to understand what kind of solutions respondents bring to bear on operational realities such as inventory fluctuations, capacity issues, and seasonality challenges. Alarming, 70 percent of respondents who report having extra capacity at some point during the year acknowledge they have no solution for that problem. This whitepaper applies economic models to these trends to begin to measure how our contemporary warehousing environment affects supply chain management.

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TITLE: *The Ultimate Guide to Being a Great 3PL Customer: 12 Surefire Ways to Elicit Greatness From Your 3PL*

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SUMMARY: Many shippers commoditize the services of third-party logistics providers (3PLs), believing that the best result will come from micromanagement and constant price pressure. In fact, the opposite is true. The more the outsourcing company invests in the relationship – as a partner, not an overseer – the more value is delivered. Here are 12 suggestions on 3PL relationship management that pave the way for breakthrough supply chain performance.



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SUMMARY: In the chemical industry, the consequences of a transport or storage accident are likely to be severe for the company and its public image. But short of a major incident, logistics usually remains under the boardroom radar. This paper argues that logistics can, in fact, be a significant contributor to bottom-line results. Based on case study analysis and interviews, this whitepaper distills five ways in which strategic supply chain management can turn challenges into opportunities and make a positive bottom-line contribution.

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SUMMARY: The time of elaborate, multi-story shopping centers is rapidly changing thanks to the rise of e-commerce and omni-channel shopping. Over the past decade, technology has inspired an online retail boom that has benefitted some retailers. This whitepaper discusses how e-commerce's role has shifted from an untested frontier to a vital pillar of the retail industry.



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AUDIENCE: Chemical supply chain and logistics professionals

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www.railtrends.com

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AUDIENCE: Defense logistics and supply chain stakeholders

FOCUS: Best practices and trends in defense logistics, military budget cutbacks, sustaining and supporting a widely dispersed troop base, collecting and analyzing data, filling the global talent gap

JAN 18-20, 2016 Atlanta, Ga.

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HALLOWEEN SCARES UP SUMMER IMPORTS

With more than 157 million Americans ready to celebrate Halloween in 2015, shippers faced a hair-raising hike in demand for costumes, decorations, and candy. They were hardly spooked. Beginning in June 2015, Halloween imports, nearly 90 percent from China, BOOmed to bring the supply chain to life for costumed, candy-munching, décor-happy Americans, who plan to spend \$6.9 billion on Halloween this year. The most popular costumes in 2015 are witches, princesses, and pumpkins for adults, kids, and pets, respectively. Expect more yellow Minions and Star Wars characters as well, as these getups haunt all three top 10 lists.*



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Call us today for a free package assessment, or download our free whitepaper "**Dimensional Weight: Don't Let it Weigh You Down**" to learn how to optimize packaging to minimize the financial impacts of dim weight pricing and deliver a better e-commerce customer experience.

800.648.9093

www.sealedair.com/ecommerce

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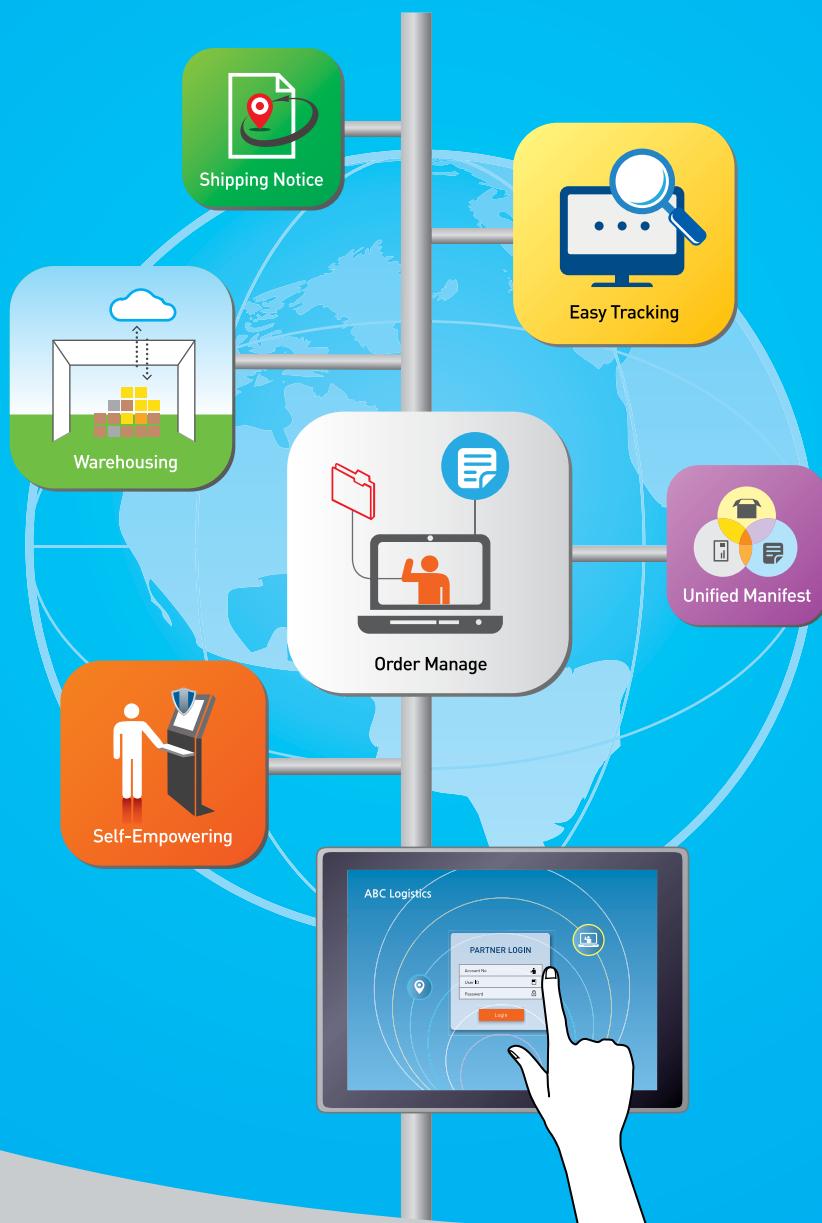
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