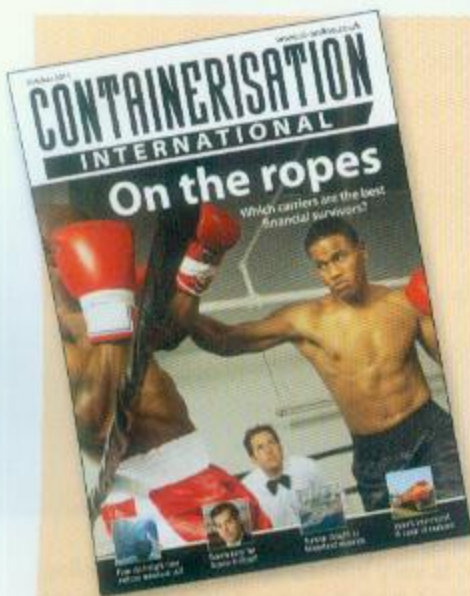


In this Issue



28 On the ropes

With many ocean carriers already slipping into the red in Q2 11, a double dip recession in the UK and Europe would be a financial disaster for most. CI sorts out the men from the boys in the first half of the year, and looks at the prospects ahead.

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Two-pronged approach (The port of Poti)



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27 ESC Column Reliability ringmarked

The launch of the 'Daily Maersk' service has been applauded by the European Shippers' Council. Its secretary general Nicolette van der Jagt explains why and how it might affect the rest of the liner industry.

30 Trade Route Waiting for the dust to settle

Prospects in the Europe-Middle East trade appear highly uncertain at this time. While the generally firm outlook for oil/gas prices and the export-led industrial projects are positive factors, ongoing political unrest, labour productivity issues and sanctions on Iran are negatives. CI reports.

34 Trade Route Onwards and upwards

Coastal container traffic in Brazil is on a growth spiral, both as a consequence of general trade growth and operators' success in winning cargo from truckers. CI reports.

36 Carrier Navigating the storm

China's major carriers – like the rest of the liner industry – are struggling with the difficult trading conditions. Focusing especially on COSCON and OOCL, CI examines their current strategies for handling the tough environment, how they are capitalising on opportunities and where their future focuses lie.

38 Logistics Taking the longer view

European city ports' container terminal operators and ocean carriers are being forced to spend more time currying favour with shippers inland, and for good reason. CI investigates.

40 Shipper Measuring up

Two new container freight rate indices have been launched, bringing the total number to five. How do these two new indices measure up and is the trend to use such products gaining pace? CI reports.

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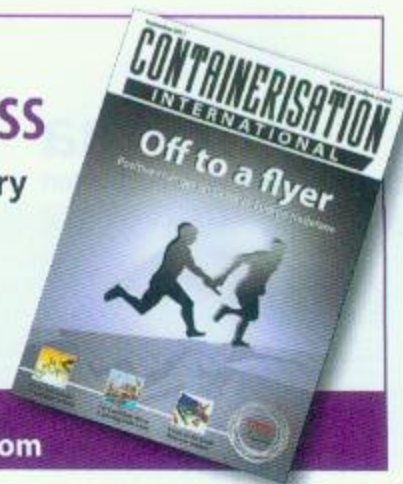
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- 43 Reefer**
A larger market share
When it comes to the seaborne trade in perishable products, reefer containers and liner shipping companies are becoming dominant. *CI* explains why.
- 44 Intermodal**
Clash of cultures
Private train operators in India are struggling with business conditions in the industry. *CI* investigates the progress made since the box train operation business was liberalised in India in 2006.
- 46 IT**
The personal touch
When it comes to the adoption of e-commerce and/or web-based management tools, the global container liner shipping industry remains stuck in the dark ages. This is despite a wide range of solutions being available. *CI* reports.
- 49 IT**
Raising the bar
The humble container spreader is such an important piece of equipment when it comes to effective cargo-handling operations in ports and terminals. But as *CI* discovers it could also have a bigger role to play when it comes to supply chain security and safety.

- 51 Terminal**
Turkish delight
Turkey has been one of the fastest growing container markets in the world recently, yet the level of penetration remains low in comparison with the size of its population. Key hinterlands are being developed though, and prospects for the country's key ports remain firm. *CI* investigates.

FOCUS ON THE BLACK SEA

- 55 Focus**
Two-pronged approach
The Georgian gateways of Poti and Batumi in the Black Sea are set to play a much bigger role for importers and exporters in central Asia due to growing sanctions against Iran. There are also plans to open the ports to bigger and more cost-effective container vessels.
- 58 Focus**
Another eastern Europe route
Whilst impressive cargo growth has returned to the Black Sea region, ocean carriers have yet to re-introduce all of the direct deep-sea services withdrawn during the recession. *CI* examines the reasons, and the remedial action being taken by its ports to become more important gateways into eastern Europe.

IN FUTURE ISSUES

The results of *CI*'s 2011 shipper survey will be revealed in the next issue. The magazine garnered the opinions of our shipper readers on the most pertinent topics affecting their business. These ranged from whether they would like to see European deregulation in other regions, the impact of larger vessels on their trades and how they perceived Maersk's 'New Normal Manifesto'.

The intra-Asia regional trades have been singled out as offering ocean carriers some of the best growth prospects in the future. *CI* investigates those tradelanes which offer the greatest opportunities and assess the strategies of the various ocean carriers engaged in them.

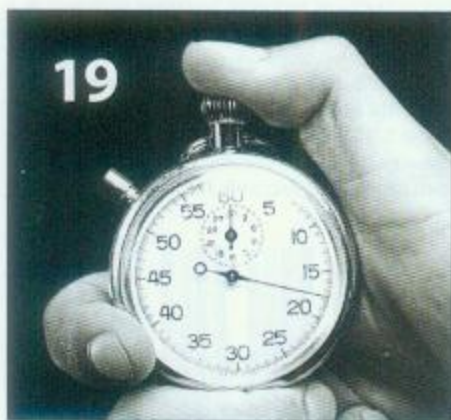
Ocean carriers have been forced to focus on economies of scale more than ever before over the past year. *CI* examines the top 50 ocean carriers and reports on why some have been winners and others losers in terms of fleet capacity deployed.

The reefer trades may offer liner shipping companies significant additional trading volumes in the future, but the sector is heavily reliant on economic prospects in the consuming regions and currency factors in the areas of production. *CI* reports.

The Federal Maritime Commission (FMC) has been urged to address the concern that US west coast ports are losing inbound cargo to facilities in Mexico and Canada, principally because of the US Government's Harbour Maintenance Tax. Is this the case and what is likely to be the outcome of this request? *CI* reports.

Poland's cargo growth continues to surprise ocean carriers. HHLA and Polzug explain to *CI* how recent rail improvements should improve Hamburg's market share compared with that of all-water transhipment.

The development of an integrated rail network connecting the nations of the Gulf Cooperation Council could radically change the way containers are moved in the Middle East Gulf region. *CI* reports on the consequences for feeder companies, ports/terminals, logistics companies and beneficial cargo owners.



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