



30 COVER

On a collision course

Ocean carriers appear to be back on the course of self-destruction, returning the market to another wave of instability. *CI* examines the causes.

FEATURES

34 ANALYSIS

CI hosts D-Day

CI's latest annual liner shipping conference was a 'D-Day' in many respects for the container freight transport industry, with talk of further deregulation, the need for more open discussion and the potential use of derivatives taking much of the limelight.

37 ANALYSIS

Reefer on a roll

This year is likely to see a further rise in the manufacture of reefer containers and prices are expected to strengthen too. *CI* investigates.

38 TRADE

Tug-of-war

While demand forecasts for the transpacific trade appear relatively healthy for the rest of 2011, excess capacity and falling rates are causes for concern. In addition, a tussle for market share between operators and east and west coasts ports is being played out as the Panama Canal expansion plan continues. *CI* reports.

44 TRADE

Harsh reminder

This year's pack ice conditions in the eastern Baltic have been far worse than usual, prompting shippers to look for alternatives to the worst affected ports, including

St Petersburg, and questioning the future of direct deep-sea services.

47 INTERMODAL

Free-wheeling

A record USD12.7 billion will be invested by US-based railroads in 2011 to create a system that can handle substantially more freight, as well as compete effectively against road and waterway options. *CI* reports.

48 SHIPPER

Twists & turns

Belgium-based Solvay explains why the process of selecting shipping lines for the carriage of its chemicals cannot easily be automated during its annual ocean freight tender.

51 SHIPPER

A chain reaction

US office products shipper OfficeMax has overhauled its supply chain with the logistics model 'The New Supply Chain Agenda'. *CI* reports on how the company has used this methodology to create a more efficient supply chain and the benefits that have accrued.

54 TERMINAL

Port of the future

DP World is a key player in Pakistan's container-handling industry. *CI* reviews its investment strategy and future plans for the country.

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FOCUS ON ASEAN

57 Focus

ASEAN ascendency

Recent years have revealed robust growth when it comes to container traffic flows in/out of the ASEAN trading bloc, with the 2010 Free Trade Agreement with China one of the latest stimuli. *CI* reports.

61 Focus

Well-stacked

The trade between North East Asia and South East Asia is booming and all mainstream ocean carriers are busy building up their services to cater for this demand. *CI* reviews the scene.

65 Focus

Solid foundation

All the main box ports in South East Asia are growing at a rapid pace and this year is – to date, at least – turning out better than 2010. *CI* explains.

68 **ENDGAME**

Twists & turns
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IN FUTURE ISSUES

The US Federal Maritime Commission (FMC) is investigating areas ranging from slow steaming to Europe's abolition of carrier anti-trust immunity, while seeking solutions to disputes between shippers and carriers and also looking into whether the container leasing industry should be regulated. In an exclusive interview with *CI*, FMC's chairman Richard Lidinsky explains the reasoning behind these studies.

During the past 18 months many new super-post-panamax vessels have been deployed in the tradelane between Asia and northern Europe, whether required or not. *CI* analyses the consequences and likely impact this will have on the market's future prospects.

While a recent conference on piracy held in Dubai once again raised the profile of this threat to international shipping and world trade and highlighted some much-needed funds for the United Nations to help tackle the issue, no new solutions were forthcoming. Meanwhile, the attacks carry on. *CI* reports on the main discussion points from the event.

Ocean carriers are withdrawing from the provision of chassis in the US. *CI* assess what impact this will have on the supply chain and what the new structure will entail.

Freight rate information published by the Shanghai Shipping Exchange since October 2009 has grown in popularity, but is it really a reliable enough indication of market trends to be used for other purposes, such as risk management? *CI* reports

CI looks at the main winners and losers when it comes to the leading ports, and terminal operators, throughput volumes in 2010.

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