



32 COVER

Proactive approach

The US Federal Maritime Commission (FMC) is investigating areas ranging from slow steaming to Europe's abolishment of carrier anti-trust immunity while seeking solutions to disputes on trading lanes to/from the US. The FMC chairman speaks to *CI*.

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46 ESC COLUMN

The law enforcer

In the present volatile climate, Nicolette van der Jagt of the ESC argues that more water-tight contracts between shipper and carriers could help eliminate some uncertainty from the logistics chain/shipping process.

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34 ANALYSIS

Beware of the big boys

According to some, the delivery of just under a half of the new super-post-panamax vessels due in 2009 and 2010 was postponed. This means that there is a pent up wave in the making, and it has now started to crash in on the tradelane between Asia and northern Europe with terrible consequences.

38 ANALYSIS

Lies, damned lies and statistics

After years of working in the dark, shippers now have a choice of freight rate benchmarks to compare their contract prices against. With more on the way, they all serve different purposes and need to be treated with care. *CI* explains why.

43 SHIPPER

In tune with the trade

Singer (Sri Lanka) is a leading retailer of consumer durables in the South Asian country of the same name. *CI* explores the company's supply chain challenges.

46 TRADE

Asia's abundance

The growth in seafood processing in China and Vietnam is putting a squeeze on traditional cold store operations in Europe while the recent and devastating earthquake and tsunami in Japan is starting to

have widespread ramifications on the global cold chain. *CI* reports.

47 INTERMODAL

Filing the void

The US container shipping trade is undergoing a transition as ocean carriers exit the chassis market. *CI* explains how this is affecting the supply chain and reviews the likely new business models.

48 TERMINAL

Shock treatment

The Sri Lankan port of Colombo is once again facing capacity problems following a sharp recovery in its traffic volumes last year. *CI* looks at what the various terminal operators are doing to alleviate the situation in advance of the new South Asia Gateway Terminal coming on stream in 2013.

FOCUS ON GLOBAL GATEWAYS

54 Focus

Up, up and away

More than half a billion TEU was handled at the world's container ports in 2010 and a near doubling in throughput is possible by 2020. *CI* reviews the biggest winners and losers in 2010 and looks at the reasons for the strong growth prospects in the future.

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59 Focus

Southern comfort

Box traffic in the southern hemisphere is expanding rapidly at many ports and terminal operating companies are keen to invest in them. *CI* investigates.

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Robust rebound

The turnaround in box traffic at North America's main ports in 2010 was significant. However, managements will have to be astute in dealing with different competitive factors in the future.

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From off the ropes

Most European ports more than clawed back traffic lost in 2009, but as *CI* reports, considerable uncertainty still prevails as the second six month period in 2010 posted much slower rates of growth.

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Global driving force

Container ports in the Far East have the momentum and collectively they enjoyed some of the fastest rates of growth in the world in 2010. Moreover, the potential from the intra-regional and emerging markets suggest they will be a force to be reckoned with for some time to come.

69 Focus

Eastern promise

Most ports in the Middle East/South Asia region enjoyed strong levels of traffic growth in 2010 and a combination of improved infrastructure, investment in the export sector and rising domestic consumption bodes well for the future.

70 Focus

Upward motion

Last year was an excellent year for international container terminal operating companies as in most cases their cargo volumes, turnover, profitability and global reach all expanded. *CI* explains why.

72 **ENDGAME****IN FUTURE ISSUES**

The trade between the US east coast and the Caribbean/Central America is one that is hugely diverse in terms of the countries served, operators involved, the types of ship and the quality of the ports/logistics networks available. But with long haul supply chain integrity an issue and the region's location on the back-door of the US, the largest consumer market in the world, the opportunities are immense. *CI* investigates.

The two-way liner trade between South Asia (Bangladesh, India, Pakistan and Sri Lanka) is one of the fastest growing in the world, while the large populations of the respective regions and the potential for outsourcing means significant potential remains for future growth. *CI* reviews ocean carriers' strategies in the trade and looks at how these are likely to evolve over the coming years.

Log-In has been extending the scope of its Brazilian cabotage services and has invested in new tonnage too. *CI* profiles this carrier's operations and asks whether it can survive in a market where so many have failed before.

The specialised reefer shipping sector is facing yet more challenges as the high price of fuel affects the competitiveness of its services. This is compounded by the fact that many of the ships used are very old and therefore inefficient and wasteful when it comes to consumption. *CI* looks at whether this will provide another filip for the reefer container.

The surge in US exports to Asia is expected to continue throughout 2011, but like last year there is expected to be equipment shortages during the peak season. How will carriers on the westbound transpacific cope with these issues and what will the supply-demand balance be like? *CI* reports on the outlook for this trade lane.

CI recently visited Sri Lanka and interviewed a number of large shippers/consignees based in the country to understand how they manage their supply chains. Among the profiles that will be published in forthcoming months will be Haycarb, a large exporter of activated carbon, and Impra Tea, which exports this commodity to most countries across the globe.

The US southern California ports of Los Angeles and Long Beach are involved in a mixed stew of both issues and initiatives. These range from the Clean Truck Program and the controversial employee-driver mandate, to their PierPass strategies, the use of sustainable box facilities and the fight to maintain cargo in the face of the widening of the Panama Canal. *CI* reports.

After a woeful 2010, which saw volumes slump at the port of Tacoma, the US Pacific North West cargo-handling complex is back on track with a rise in liftings this year. *CI* looks at whether the recovery is sustainable and a platform on which to build for the future.

Germany's economy is one of the most resilient in Europe and the country continues to be a major importer and exporter of containerised goods. *CI* reviews the opportunities and challenges of the nation's containerised freight market by speaking to ports, ocean carriers, shippers/consignees and logistics service providers.

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