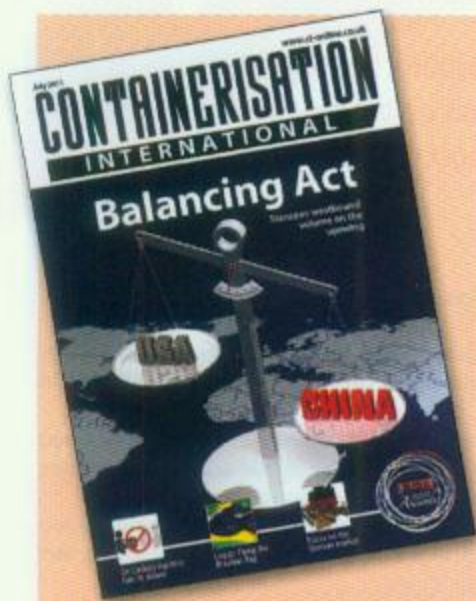


In this Issue



26 Balancing act

Currently, the westbound transpacific trade is growing faster than the headhaul eastbound leg, and box shortages appear to be of increasing concern to a number of parties in the US. In addition, calls for longer-term and index-linked freight contracts are increasing. *CI* investigates.

Regulars

- 4 Trade Statistics
- 6 Fleet Update
- 8 News Analysis

Beating congestion in Germany



28 Trade Route Opening up

Despite the often volatile nature of the liner trades linking the US with the Caribbean and Central America, there is huge potential for growth, if only because of the region's location on the back door of the biggest consumer market in the world and its proximity to a bigger Panama Canal.

32 Carrier Upwardly mobile

The intra-regional South Asian trades are experiencing rapid growth and ocean carriers are tapping into these markets and developing service strategies that make for a sustainable future.

36 Carrier Flying the flag

Log-in Logistica, the Brazil-based coastal operator has established a strong position in several trades along South America's east coast and is now phasing in larger and locally-built containerships. As *CI* reports, a new era beckons.

38 Logistics Logistics let-down

Hopes that Sri Lanka could become a freight logistics hub for the greater South Asia region following the cessation of over 20 years of civil war in 2009, have largely been unfulfilled. *CI* explains why.

39 Shipper Pointers to the future

Impra Teas Group is one of the Sri Lanka's major tea exporters and it ships to over 60 countries. *CI* examines its supply chain.

40 Shipper Prevailing prejudice

Haycarb is a Sri Lankan company engaged in the production and export of activated carbon, which is used as a purifying agent. *CI* analyses the supply chain challenges it faces.

43 Reefer Embroiled in oil

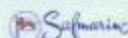
The specialised reefer shipping industry has seen its share of the perishables

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cargo business decline dramatically over the past decade. And worse could be afoot as the sector's competitiveness is affected by higher fuel costs and the need to reduce shipping's carbon footprint, given its ageing fleet.

45 Trade Route
Juggling balls

The US ports of Los Angeles and Long Beach are juggling a mix of issues and strategies spanning expansion and competition from the country's east coast ports to the PierPass system and Clean Trucks Program. *CI* investigates.

50 Terminal
Onwards and upwards

There is a definite beat when it comes to the container port scene in Latin America, with cargo volumes generally rising and investor interest strong. *CI* reports on what is proving to be a very dynamic industry.

52 Terminal
Something to smile about

The US port of Tacoma has started 2011 well with rising cargo volumes after a glum 2010, when liftings fell. *CI* reports on the reasons behind the recovery and the port's hopes for the future.



FOCUS ON GERMANY

54 Focus
The gateway to Hungary

Much of Germany's port throughput growth over the past 18 months has come from eastern Europe, but it no longer has the playing field to itself. *CI* examines the case of Hungary as an example.

55 Focus
Beating congestion

Hamburg and Bremerhaven know that their future success depends as much on how well hinterland connections are improved as managing the ship-to-shore interface efficiently. *CI* examines the latest intermodal developments.

57 Focus
A vision for the future

Hamburg and Bremerhaven's container terminals have worked hard to prepare for the next economic boom, but much still remains to be done, including the deepening of the River Elbe and speeding up of trucking transfers. *CI* reports.

72 Endgame



IN FUTURE ISSUES

Ocean carriers are rushing to buy new super-post-panamax vessels in a way that suggests that balancing future supply and demand is not the main driver behind these decisions. *CI* assesses what the other likely motivators are and reports on the possible devastating long-term consequences from this latest contracting binge.

The exit of the niche carrier The Containership Company (TCC) from the transpacific trade earlier this year has raised some doubts as to whether such operations can survive, especially in mainline trades. But Grand China Shipping is expanding in the same market and there are examples where the niche concept works well in US trades. *CI* investigates.

CI reports on the current state of the Mediterranean/east coast South America trade which over the years has played host to many different operators and carrier strategies and where supply and demand has rarely been balanced and freight rates highly volatile.

The shipment of automotive parts and components accounts for a significant slice of box traffic for many ocean carriers while shippers/consignees are often very demanding of the services they want. Failure to deliver can have profound and very expensive repercussions for all concerned. *CI* reports.

In a number of ports across the world, port-centric logistics concepts have been successfully implemented. *CI* looks at how such an approach may be adopted in India, where landside infrastructure has always been extremely challenging but where cargo flows are rising rapidly and the demand for value-added logistics services is growing.

Port Community Systems are a well-established way for European ports to attract cargo away from each other. The European Union now wants to establish a 'single window' that links them together to make Europe's supply chains more competitive against the rest of the world. *CI* investigates.

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