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AFRICA: THE LAST FRONTIER





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CHECKING





Navigating New IT Pathways

ogistics information technology is many things, but static isn't one of them. In the supply chain, cloud computing opened new ways for logistics managers to deploy best-of-breed solutions, capture and disperse information, and execute change. Mobile communication enables practitioners to seed the cloud from anywhere, then feed off that shared data. Social media offers a real-time communication stream for connecting partners through this moving cloud.

The burden many logistics IT buyers carry today – whether they are shippers, carriers, or intermediaries – has less to do with the technology itself, and more with interpreting information to make it purposeful. While Software-as-a-Service and pay-as-you-go price structures helped democratize capital expenditure, and made it easier for smaller organizations to compete against companies outside their weight class, big data presents a considerable challenge and opportunity. Our cover story, Business Intelligence in the Supply Chain (pg. 38), delves into this emerging trend.

To a degree, cloud is a solution in itself. On-demand applications allow myriad users at different supply chain touchpoints access to a common data stream. While this creates greater visibility to information, the internal expertise to leverage all this new logistics IT power sometimes does not exist.

To fill the void, logistics managers increasingly rely on IT partners, or third-party logistics providers. This evolution is changing the way companies approach technology investment and execution, and how solutions developers are serving the market. IL's annual Top 100 Logistics IT Providers list reflects this changing paradigm, and serves as a resource to find the solutions that are right for you whether you buy logistics IT directly, or get it through your carriers or logistics partners.

When evaluating the IT providers who submitted credentials for Top 100 consideration, our editorial selection committee saw a marked uptick in those who exclusively target intermediaries. About 90 percent of surveyed IT companies serve 3PLs, warehouses, and carriers, according to IL's 2013 logistics technology market research (pg. 56). This surpasses every other industry niche by a considerable percentage.

With this empirical evidence, and after some thoughtful debate, we decided to include some of these IT companies, for the first time, in the Top 100 list (pg. 58). While we value developers that deliver best-in-class techonology to logistics managers directly, we also recognize that various pressures are pushing logistics managers to consider other options – often through the purview of their third-party providers.

Today's IT trends—big data, cloud, integration, visibility—let you harness technology in countless ways to find greater efficiency and economy. Why discriminate against how you access that technology?

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THE MAGAZINE FOR DEMAND-DRIVEN LOGISTICS

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Flight Path

Your magazine is always on the cutting edge of supply chain and logistics management issues, and is very balanced in its treatment of all transport modes.

Please keep up the good work—and if you could send a copy of the airfreight industry article from March 2013's *Trends* section, I would really appreciate it. I am completing work on my Master's degree and thought this might provide me with some critical direction.

- **Stan Killins,** AIR-6.8.5.2.2, Deckplate TD, Fixed Wing Manager

Strike One

The article Panama Canal: More Questions Than Answers (December 2012) states, "The Longshoremen's Association's (ILA) latest strike threat at the Ports of Long Beach and Los Angeles has put industry on notice—if it wasn't already. The ILA's summer 2012 contract standoff at U.S. East and Gulf Coast ports—a resolution that is

still pending—forced many shippers to plan for possible disruptions."

I think the article was referring to the threat of a strike by a unit of our local International Longshore and Warehouse Union (ILWU), the Marine Clerks Association Local 63 Office Clerical Unit (OCU). OCU did strike at the end of November and early December 2012, closing seven of eight container terminals at the Port of Los Angeles and three of six container terminals at the Port of Long Beach.

The ILA represents dockworkers on the East Coast ports. ILWU represents dockworkers on the West and Hawaii. They are separate entities.

— **Daniel Yi,** Media Relations Manager, Port of Long Beach

Hard Truths

Keith Biondo's March 2013 Checking In column (America's Hardened Arteries) just landed on my desk. It's a sobering message.

— **Kevin Warnock,** Traffic Coordinator, Amalgamated Sugar

Department of Corrections: The March 2013 article *GTM: The World at Your Fingertips* incorrectly reported U.S. 2012 import/export totals. The correct figures are \$2.3 trillion and \$1.6 trillion, respectively.







Minimizing Supply Chain Risk

ean concepts such as just-in-time, virtual inventory, supplier rationalization, and fewer distribution facilities reduce total supply chain costs. They also increase supply chain risk. Chris Cameron, solution architect at Exton, Pa.-based supply chain solutions provider Elemica, offers these tips for preventing supply chain disruptions.

Quantify and assess current risk. Quantify and prioritize risk, then develop a mitigation strategy. Start backward from the customer and gauge the revenue impact of supply chain disruptions. Follow that trail through the manufacturing cycle to the potential sourcing or logistics constraining factors.

ldentify supply and delivery alternatives. Build collaborative relationships with primary and secondary suppliers, and know which suppliers represent the best alternative sources.

Empower your trading partners. Institute a collaboration platform and communications framework designed to facilitate information exchange, while cutting costs and reducing errors.

Select vendors in different geographic regions who supply through secondary ports.

Maintaining a diverse base of suppliers – even when equivalent materials are available from suppliers in the same region—will help when one country experiences a disruption.

Fully engage in supplier relationships. Because you will need to rely on them for help if disruptions arise, monitor suppliers for any potential problems. This includes knowing the suppliers' risk factors: financial strength, compliance with regulations, risk management practices, and the political stability of their countries.

Take control of logistics processes. Instead of abdicating to the suppliers' delivery, bring items closer to home where it makes economic sense, and globally source where savings are balanced by assurance of supply. It is crucial to take ownership of both the supply and delivery processes to understand the inherent risk, regardless of who has economic responsibility for delivery according to the terms of the sales contract.

Jointly plan and collaborate about potential supply chain disruptions.

Include suppliers, logistics service providers, and customers in your collaboration plans. Drive toward mutually available risk plans for each link in your supply chain.

Build flexibility into processes so you can promptly adapt to changes with minimum impact.

Share forecast and demand information with trading partners so you can be more responsive to customer demand fluctuations. Develop a corporate culture of agility, rather than reactivity. Agile companies can respond rapidly and effectively to manage supply or demand changes.

Optimize inventory buffers and safety stock levels. Make sure you have enough supplies to keep producing.

Be proactive. Increase visibility into supply chain operations, including event management that enables tracking and monitoring material flow as it happens. Incorporate analytics to identify patterns as they develop for datadriven pre-emptive action.



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READER

PROFILE

as told to Merrill Douglas



Jason Mathers is senior manager, corporate partnerships at the Boston office of the Environmental Defense Fund (EDF), an environmental advocacy group. He has held this position since 2006.

RESPONSIBILITIES

Leading partnerships with Fortune 1000 companies to reduce carbon emissions in freight transportation while also reducing freight costs.

EXPERIENCE

U.S. Navy, *USS Normandy*, operations specialist, petty officer, second class; global environment program outreach specialist, Union of Concerned Scientists.

EDUCATION

BS, environmental science, minor in resource economics, University of Massachusetts, Amherst, 1999; MS, economic policy, Suffolk University, 2004.

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Jason Mathers: Carbon Slasher

EFORE I STARTED WORKING WITH SHIPPERS AT EDF, I spent several years working with companies that lease light-and medium-duty vehicles. We wanted them to change the environmental criteria they used when choosing vehicles, and focus more on performance metrics.

When a company leases a 10,000-vehicle fleet, then announces it is operating 100 flex-fuel vehicles or 50 hybrids, it hasn't changed its environmental performance in the grand scheme. We told companies that switching from 22-mpg trucks to 24-mpg vehicles would be more cost-effective, and make a greater impact on carbon emissions.

People like getting attention for taking exciting steps—such as buying hybrid vehicles. But the secret is that sustainability comes down to efficiencies.

Now that I'm working in logistics, it's exciting to find so much overlap between efficient logistics management and sustainability best practices. But increasing the amount of product on your trucks by

10 percent will not get your company on the front page of the newspaper.

Freight movements account for about eight percent of total carbon pollution in the United States. Only electrical generation and personal vehicles account for more. EDF decided to focus on logistics because shippers have both the decision-making power and the cost-saving motive to drive sustainability.

They can choose to design distribution networks that allow them to use more efficient transportation modes, such as rail. They can decide whether to collaborate with other companies to load fuller trucks. Those decisions offer real business advantages, and will also lead to significant sustainability benefits.

The Big Questions

How do you recharge your batteries?

Spending time with my wife and son, doing everything it takes to entertain a two-year-old. I also like fly fishing and woodworking.

What would be your alter ego dream job?

Brewing good craft beer.

Do you have a guilty pleasure?

I can never say no to a chocolate chip

Is there something you don't do especially well but love doing?

I wish I could play a musical instrument. I'm currently dabbling in the mandolin.



EDF has been collaborating with the Massachusetts Institute of Technology on a series of case studies about companies that changed their freight flows to enable cost and carbon savings. The first study, released in February 2013, looked at changes that Ocean Spray made to its distribution in the southeastern United States. Those changes reduced costs and carbon emissions by about 20 percent.

Our efforts in the logistics sector are part of a larger initiative aimed at supply

chain sustainability. EDF has an office in Bentonville, Ark., where we work with Walmart on its sustainability programs. EDF is also working with the Sustainability Consortium at the University of Arkansas, and a group of consumer products companies and retailers, to set sustainability guidelines.

Many of those supply chain efforts focus on sourcing. If you're an apparel manufacturer, where is your cotton grown? How efficient is your manufacturing site in Asia? Those are critical areas, and a lot of good work goes into them. But they are often long-term issues.

In logistics, however, you can do a lot right now, with minimal capital investment. If you find collaboration opportunities that might reduce carbon emissions by 20 percent, for example, that's also an immediate cost savings. While those kinds of nearterm, significant wins are rare in supply chain sustainability, they're abundant in logistics.

Your 2013 goal is to improve supply chain performance. Now what?

Start your rapid performance improvement today.

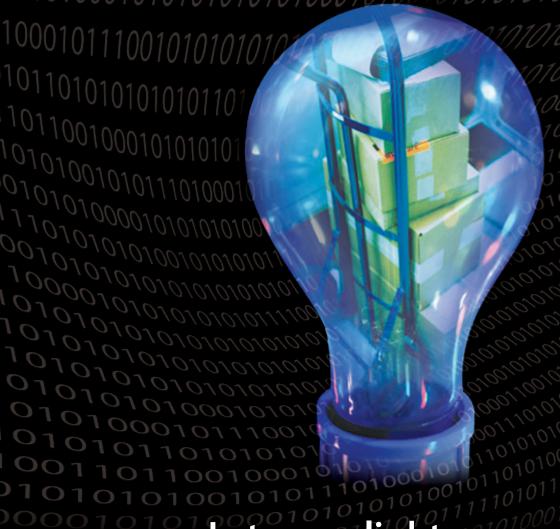
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NOTED

THE SUPPLY CHAIN IN BRIEF

UP THE CHAIN



▲ Joy Rice was appointed regional supply chain support director for Diageo's Asia Pacific region. Rice is restructuring the drink company's Asia Pacific supply chain to source 50 percent of its supplies from local markets.

Automaker Nissan named Anthony Laydon corporate vice president for global supply chain management, as part of an effort to strengthen its global and regional management teams.

Quiksilver, a global manufacturer of branded sports apparel and footwear, appointed Kasey Mazzone global head of supply chain. The move supports efforts to consolidate the company's regional management structure into a single global management structure.

GREEN SEEDS

Hellmann Worldwide Logistics joined the Sustainable Apparel Coalition (SAC), a group of apparel and footwear companies that promotes reducing environmental impacts and improving sustainability through their supply chains. The 3PL will plan programs to help manufacturers manage waste, switch to alternative energy sources, and choose environmentally friendly packaging.

YRC Freight purchased four liquefied natural gas trucks as part of its sustainability initiative. The trucks will leverage the Clean Energy fueling infrastructure in southern California as they serve the Port of Long Beach and surrounding areas.

To improve energy usage and economic efficiency, **NYK Line** installed E-COOL fluorescent lighting systems on six of its car carriers. The ocean carrier expects the

lights to consume 40 percent less power and reduce CO₂ emissions by one percent per voyage.

Transportation company C.R. England purchased Deflecktor Aero Wheel Covers from A de F to outfit 1,000 company-owned trucks. The wheel covers are expected to save more than 100,000 gallons of diesel fuel annually.

PITT OHIO reduced



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SEALED DEALS

► Appliance manufacturer **Electrolux** selected the **GT Nexus** platform to share information with its transport service providers, allowing all global supply chain partners to execute operations more efficiently.

Henkel Consumer Goods,

the company behind Dial soap, Purex laundry detergent, and Loctite adhesives, contracted Saddle Creek Logistics Services to provide day-to-day support for order management; shipping; KPI reporting; warehouse and transportation development; systems enhancements; and supply chain network improvements.

Great Lakes Wine & Spirits, a Waterloo, Ontariobased wine and beer distributor, chose a mobile solution from Descartes Systems to improve delivery performance across its fleet. Descartes' Mobile for Android allows Great Lakes to manage drivers by providing stop sequences, order details, and driving instructions.



Luggage manufacturer **Delsey** signed a contract with the freight management division of **Geodis Wilson**, a third-party logistics provider. Geodis Wilson now provides Delsey with intra-Asia freight and warehousing services, and full containerload deliveries to the United States, France, Latin America, the Middle East, and Asia Pacific.

IN MEMORIAM



Wayne A. Cederholm II, 1955-2013

Wayne A. Cederholm II, CEO of transportation company C.R. England, passed away April 9, 2013, due to complications from a bone marrow transplant. He will be remembered for his integral role in growing C.R. England to become one of the world's largest refrigerated carriers, and for his 33 years of dedicated service to the company.

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recognition

The Chartered Institute of Logistics and Transportation acknowledged **DHL Global Forwarding** as **Ireland's Freight Forwarding Company of the Year.** The award recognizes DHL's project work supporting major sporting events in 2012.

Alcoa designated **USA Truck** as its **Tier 1 Carrier of the Year** for offering creative transportation solutions and providing outstanding dry van service in North America.

Wallenius Wilhelmsen Logistics earned recognition as a 2012 Partner-level Supplier and was inducted into John Deere's Supplier Hall of Fame for winning the award for five consecutive years. Wallenius Wilhelmsen achieved the honor for providing outstanding products and service while committing to continuous improvement.

The Truckload Carriers Association presented the **Past Chairman's Award**, the company's highest honor, to **Don H. Freymiller**, founder of Oklahoma City, Oklabased Freymiller Trucking. Freymiller received the award for establishing a company with a long tradition of customer satisfaction, safety, and innovation.



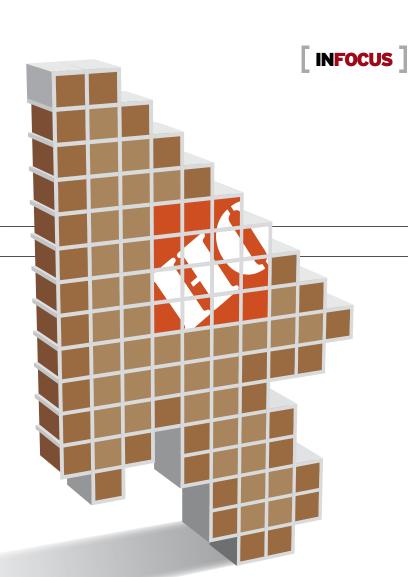
▲ American Airlines was named The Express Delivery and Logistics Association's (EDLA) 2012 International Airline of the Year. This is the third time American Airlines received the award, which is based on results of an EDLA membership survey.

The U.S. Forwarder's Association awarded **Lufthansa Cargo** with the title of **Best International Freight Carrier**. Lufthansa was evaluated in multiple categories, including customer service, on-time performance, reliability, and security.









Home Depot Integrates Clicks With Bricks

eeting e-commerce demand remains a moving target for many retailers—literally and strategically—and their creative ideas are flowing. Every day brings a new development, then trial, error, success, and innovation. As distribution strategies mature with the growth of omni-channel fulfillment, e-commerce offers boundless opportunities for entrepreneurial retailers.

by Joseph O'Reilly

SHAPING THE FUTURE OF LOGISTICS

One such company is The Home Depot, which is folding direct fulfillment into its existing brick-and-mortar distribution blueprint. Mark Holifield, senior vice president of supply chain for The Home Depot, discussed this move with *Inbound Logistics* during a recent meeting at the Georgia Logistics Summit.

Home Depot customers—whether they're ambitious homeowners, contractors, or small businesses—have a knack for do-it-yourself verve. The retailer's Web site is often their first

stop for any and all home improvement queries. Shoppers can look online to compare products, visit stores to "touch and feel" them, then buy on site or online.

Home Depot is striving to create an "interconnected retail" experience for consumers that blends the best of brick-and-mortar and virtual service, according to Holifield. This may entail buying online and picking up product at a store, having inventory shipped to a store, or returning online orders direct to a

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store. Eventually, it may also include sameday or next-day fulfillment from stores.

This effort is so important that Home Depot added interconnected retail to its three-legged business model, joining product authority, productivity and efficiency, and customer service. From a distribution and logistics perspective, e-commerce impacts all these areas. It's the dovetail joint for 21st-century supply chains.

Traditional brick-and-mortar retailers such as Home Depot have quickly recognized the importance of managing direct fulfillment. But they also understand the leverage they have with customers from a service perspective-something virtual marketplaces lack. Whether it's taking in the IKEA experience or enjoying a Cabela's shopping safari, retailers are appealing to consumers on a more personal level.

This engagement extends to how retailers serve customers, especially when it comes to mixing direct fulfillment and instore capabilities. Home Depot stores stock

about 35,000 different SKUs; its direct fulfillment DCs carry three times as much. The key is optimizing physical presence with fulfillment capabilities, says Holifield.

Figuring out the right strategy is important because direct fulfillment adds complexity and cost to the supply chain. That's why Home Depot has purposely kept its retail flow-through and e-commerce operations separate.

"The flow-through centers handle 70 percent of our SKUs," Holifield says. "We have 18 retail DCs that are situated based on the store locations and the U.S. population. Our inventory doesn't lend itself to pick, pack, and ship."

Home Depot's flow-through DCs are homogenous in terms of technology and materials handling equipment. "You can walk into any DC and you wouldn't know if you were in Topeka or Salem," explains Holifield.

The e-commerce side displays less consistency. Different markets have unique

wrinkles. Home Depot currently operates direct fulfillment centers in Hagerstown, Md., Baton Rouge, La. - which will soon be replaced by one in Atlanta – Mexico, Mo., and a new one coming online in southern California. They will always be regional in scope to take advantage of parcel-shipping zones.

Home Depot's objective moving forward is to standardize direct fulfillment DCs much like its retail facilities. But it's a challenge, especially as the rules of engagement for e-commerce continue to evolve.

"Direct fulfillment is the hardest to figure out," Holifield says. "The same question has multiple answers, which are tied to products and location. An answer in Paducah may be different than Atlanta, which is different from Waco."

The types of challenges retailers encounter as they align their omni-channel distribution networks also creates new opportunities. E-commerce is still a new phenomenon for many companies. A

Mighty Swoosh Goes Green With Bluesign

n an effort to clean up its supply chain and source more sustainable materials and chemicals in its products, Nike has partnered with Switzerlandbased Bluesign Technologies to use its sustainable sourcing standard.

As the world's largest sportswear brand. Nike's supply chain spans 50 countries, 800 contract factories, and hundreds of textile manufacturers that supply them. Based on its own analysis, Nike found that 60 percent of the environmental impact from a pair of shoes comes from the materials used. So, in 2011, the company announced an effort to eliminate all

releases of hazardous chemicals across its global supply chain by 2020.

Using Bluesign's Bluefinder tool, a supplier can access pre-screened and more sustainable textile preparations-including dye systems, detergents, and other process chemicals used in manufacturing. The tool enables suppliers to manage restricted substances, and provides the opportunity to increase water and energy efficiency.

Another tool, Blueguide, allows Nike access to more than 30,000 materials that have been produced using these sustainable chemicals.

Before partnering with Bluesign, Nike had to assess individual factories and suppliers, which was a time and capital drain.

"To shift to a palette of entirely sustainable materials, multiple

stakeholders must work together to innovate new chemistry, encourage the use and scale of better chemistry, and eliminate harmful chemistry," says Hannah Jones, Nike's vice president of sustainable business and innovation.







The Home Depot is building an e-commerce fulfillment strategy that blends the best of its brick-and-mortar and online services.

pioneering spirit drives creativity and innovation inside the warehouse and beyond.

For example, Google debuted a pilot project called Shopping Express, which provides same-day delivery in the San Francisco area for local and national retailers including Target, Walgreens, Staples, and Toys R Us. Consumers can specify a delivery window or provide special instructions for Google's couriers. It's akin to Amazon's Prime service.

Not to be outdone, Walmart announced its intention to explore the potential of coordinating with store customers to make home deliveries to online shoppers. Tapping customers to transport goods would put the world's largest retailer squarely in the middle of the new "crowd-sourcing." Walmart will have to clear some significant hurdles to make this a reality—notably on the legal side—but it's not beyond the realm of possibility.

E-commerce is also impacting traditional distribution paradigms, noted UPS during a recent interview with *Inbound Logistics*. As more people buy online, parcel carriers such as UPS are challenged with delivering packages when customers are home. Failed deliveries are a drain on driver efficiency. One solution might be using the corner shop—a central meeting point where people gather daily in urban areas, especially in parts of Europe—as a quasi depot to drop off and pick up parcel shipments.

If one fast rule governs the way retailers approach today's market it's this: be nimble, because rules will change.





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Home Court Advantage: Lean

any companies are turning to lean principles in lieu of moving offshore to streamline and augment manufacturing capacity.

One example is Daktronics, the world's largest supplier of computer-programmable displays and electronic scoreboards. In 2006, the Brookings, S.D.-based company began implementing lean production techniques throughout its 725,000-square-foot manufacturing footprint in order to establish repeatable processes and reduce lead times.

"Our lean efforts netted a 60-percent increase in factory efficiency," says Neil Andal, lean manufacturing manager, Daktronics. "Standardizing processes across the company empowers us to build higher-quality products in all our factories."

It also provided the company greater latitude to shorten its supply chain and eliminate unnecessary logistics expense.

"Daktronics assembles the components of our modules domestically," says Andal. "We are able to do this by continually improving engineering and manufacturing process efficiency."



Computer display maker Daktronics scores efficiency gains through Lean principles, rather than offshoring.

Food Regulation for Thought

hen it comes to food safety, quality, security, and regulatory compliance, companies are well aware of the consequences. Anything that shakes brand confidence leaves a lingering bad taste.

Those stakes will be raised when the Food Safety Modernization Act (FSMA) is finally rolled out after lengthy review. The total impact on shippers remains pure conjecture. Further rulemaking, and the current sequestration on federal spending, will likely delay any resolutions or enforcement in the near term.

FSMA was signed into law in January 2011 to instruct the U.S. Food and Drug Administration (FDA) on how to better manage and respond to product recalls, as well as put in place a regulatory architecture to prevent such occurrences from happening in the first place. It had been more than 70 years since the U.S. government last introduced any significant food legislation. Change was necessary and widely welcomed.

But any modification to food handling and transportation practices has a rippling impact throughout the supply chain, especially as it relates to tracking, traceability, and chain of custody. The third-party logistics (3PL) sector is front and center in this unfolding regulation because of the important role it plays as a transportation and distribution facilitator.

This presents a problem. Congress has passed "evolving" legislation that directly targets 3PLs—but policymakers don't know what a 3PL is.

"Many Congress members, senators, and regulators still have no idea what a warehouse-based 3PL does," said Patrick O'Connor, partner in the Washington-based practice Kent & O'Connor, and legal liaison for the International Warehouse Logistics Association (IWLA). He spoke at IWLA's annual conference in March 2013.

While O'Connor acknowledged that the costs of FSMA compliance will "cause some heartburn" for 3PLs, food safety and security has become a hot-button issue, and government expects all supply chain players to be part of the solution. In particular, this accountability extends to large food companies that stand to lose the most when bad publicity about good products runs amok.

"Big brand manufacturers are not interested in letting any segment of the supply chain off the hook," said O'Connor. "They want everyone in the boat with them."

Still, vague interpretations and amended rulemaking muddle the legislation. The new Hazard Analysis and Risk-Based Preventive Controls provision, for example, directly impacts warehouse-based 3PLs. Each facility subject to this rule would be required to implement a written food safety plan that focuses on preventing food product hazards. This includes protocol for triggering recalls and notifying consignees and the general public.

The provision will require companies to revise current good manufacturing practices, and regularly update and sign off on plans that incorporate new food products that enter a warehouse.

The preventive controls rule applies to "any facility that manufactures, processes, packs, or holds human food," O'Connor explained. "This includes any facility that is required to register with the FDA under the Bioterrorism Act amendments of 2001."

Exemptions to the preventive controls rule are vague. If a facility is solely engaged in the storage of non-refrigerated packaged food, but that food is not exposed to the environment—meaning workers cannot physically touch a product—then it would be exempt from implementing a food safety plan.

As an example, O'Connor cited a case where strawberries were warehoused in plastic clamshell packaging. The FDA considered that product a packaged good. However, if strawberries were packaged in a box or crate with vent holes—and could in theory be touched by individuals—that facility would not qualify for the exemption. The context of the rule still lacks clarity.

"Many Congress members, senators, and regulators **still have no idea** what a warehouse-based 3PL does."

- Patrick O'Connor, partner, Kent & O'Connor

While federal and state regulatory policies serve an important purpose, layers of bureaucracy and complexity also add costs and inefficiencies to the food chain.

"Transportation providers now have to comply with the Sanitary Food Transportation Act and the FSMA. Trucking companies that historically have been regulated by federal and state DOTs now have to deal with the USDA, U.S. Department of Health and Human Services, and Homeland Security. Various state agencies are now jumping into the transportation regulation mix," said Ken Esser, director of logistics at CSM Bakery, during a food panel discussion at the Georgia Logistics Summit in March 2013.

CSM Bakery is an Atlanta-based amalgamation of several companies that produces icings, cakes, muffins, and cookies at 12 plants across the United States. Keeping track of regulatory measures in other

parts of the country is difficult, acknowledged Esser.

He pointed to recent developments in California. Expanding on the state's notoriously stringent emissions standards, the California Air Resources Board now holds shippers and consignees accountable for hiring third-party partners whose reefers don't meet the state's Transportation Refrigeration Unit regulation. Previously, the owner of a non-compliant unit could be fined up to \$10,000. Now liability is extended throughout the supply chain.

"If I'm in Atlanta, and book a load to California, I can get fined \$10,000 if my carrier's equipment does not meet California's standards," explained Esser.

While the food industry is a fluid regulatory environment, safety and security remain priorities. It is incumbent upon supply chain partners to stay vigilant and proactive.





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GLOBAL

THE WORLD AT A GLANCE

by Joseph O'Reilly



Russia Rushes to Develop Trans-Siberian Rail Line

Things are heating up in the Orient—and Russia, for once, is lighting a spark. The country is in a favorable position as domestic consumption continues to grow, Europe struggles, and Asia's economies grow apace.

Spanning two continents, Russia has long sought to develop and expand infrastructure across Siberia to connect the world's foremost trading partners. Now the government is backing up that ambition with \$8 billion to upgrade its Far Eastern rail network.

The state railway monopoly will receive national pension and welfare funds to develop its Baikal-Amur Mainline (BAM) and Trans-Siberian routes by 2017, according to Prime Minister Dmitry Medvedev. The 2,686-mile BAM line crosses Siberia and Russia's Far East to the north of the 5,772-mile Trans-Siberian line, which has connected Moscow to the Pacific port of Vladivostok since 1916.

The government will also seek money from private investment and by increasing

tariffs and issuing Russian Railways bonds. The railroad estimates the total cost of revamping the two routes by 2020 will approach \$29.5 billion. By comparison, in 2010, Russian Railways invested about \$390 million in its Far Eastern network.

Also reinforcing the government's commitment to this project's success is talk of privatizing Russian Railways—which operates 53,000 miles of track across the country—to help spur progress.

Russia ships half its exports to Europe but, prompted by the region's debt crisis, is aiming to double the share going to the Asia-Pacific region, which currently

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accounts for one quarter of total volume. In 2011, 18 million tons of freight was ferried along the BAM and Trans-Siberian routes. By 2020, that figure is expected to jump to 64 million tons.

It's not only Russia that plans on expanding use of the Trans-Siberian rail network to connect Europe with Asia and provide shippers a more time-definite option. In 2010, German rail carrier Deutsche Bahn and the Chinese Ministry of Railways signed a memorandum of understanding to strengthen rail freight links between China and Europe.

More recently, CEVA announced in March 2013 that it was launching a new China-to-Europe railway service that connects Suzhou with the Netherlands. The transit time for the entire journey is approximately 28 days, covering a 6,835-mile northern route across Russia.

London Calling

The new \$2.2-billion London Gateway container port in Essex, England, will be a game changer by providing quicker access to southeast England, according to DP World, which is backing the project.

An adjacent logistics park will facilitate prompt dispatch to destinations including London. Currently, containers that come into Felixstowe, England's largest port, are



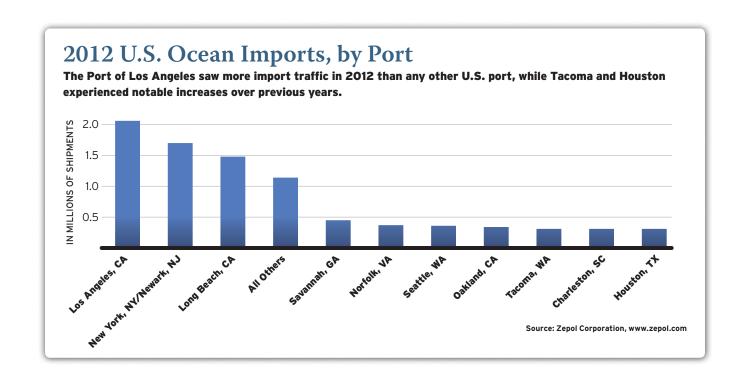
ferried to warehouses in the Midlands before they are dispatched around the United Kingdom.

The first phase of the London Gateway project, which is being built 20 miles down the River Thames from London, will open later in 2013 and accommodate 3.5 million containers annually, providing healthy competition for the London market.



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Asia, Europe Remain Shipping Super Powers

Asia and Europe are equally important as markets for global shipping, and London is the industry's leading financial center, according to Norton Rose, an international law firm based in London.

The two historically linked trading powers were each ranked as the leading market by 39 percent of respondents to Norton Rose's recent survey of more than 1,000 people in the shipping, aviation, and rail

industries. Forty percent cite London as best able to meet the industry's financing needs, compared to 15 percent for New York and 13 percent for Singapore.

Reflecting the heavy toll global economic recession has had on the shipping community, 42 percent of respondents name financial constraint as the most important change to their business since 2010, leading 26 percent to consider using structured finance, and 23 percent to use or consider private equity for the first time, according to the report.

"In line with the development of China and India as economic powers, Asia has

been the most buoyant shipping market for a number of years," says Philip Roche, co-head of shipping at Norton Rose. "While London — and to some extent New York — remain key financial and legal service centers for the shipping industry, Singapore has successfully positioned itself as an increasingly important legal and financial center for shipping, and this trend will no doubt continue."

Brazil's Soybean Grind

The 2012 U.S. Midwest drought had a marked impact on domestic grain production, opening the door for foreign competitors such as Brazil to capture global market share.

But despite expectations of a record 2013 soybean crop, farmers are confronted with a sobering reality: Brazil's transport problems are stifling production.

The country's soybean harvest has a long window due to wide-ranging planting dates in various parts of the country. But delays in Brazil's rain-soaked west-central states and drought-stricken southern states, and a faster-paced yield for the top producing state of Parana, means farmers are harvesting at the same time—which exacerbates weaknesses in Brazil's transportation network.

Growers fear that a bottleneck is likely to occur, as there are too few trucks and insufficient trains to transport the crop from fields to co-ops or ports for export. While farmers have been investing in new equipment to add capacity, the Brazilian government implemented a new law limiting the number of hours truck drivers can spend on the road. Also, leftover corn from last year's harvest is being shipped at the same time, further sapping capacity.

The expectation of more rain only complicates the "growing problem" as it will delay other harvests and the planting of a second corn crop, which could reduce this year's yield.

European Businesses Collaborate Around Sustainability

Lack of standardization has become a major obstacle for the global sustainability cause. Without best practices and benchmarks for supply chain partners to share and perform against, widespread change is difficult. So it's worth noting when manufacturers and retailers collaborate on sustainability initiatives.

Nestlé, Sainsbury's, and The Co-operative Group-the United Kingdom's largest mutual retail business owned by more than six million consumers-vow to improve the environmental performance of some products in accordance with Product Sustainability Forum (PSF) research.

An initial assessment of the environmental impact of grocery products, published by the Waste and Resources Action Program on behalf of the PSF, identified 50 grocery products with the greatest environmental impact. The production and sale of these

products-including bread, potatoes, bananas, and milk-contribute as much as 33 percent to household consumption of greenhouse gases (GHG), says the report.

As a result of the study, the Co-operative, Nestlé, and Sainsbury's will pilot "pathfinder" projects intended to shrink the supply chain footprint of products with the most GHG emissions, waste, and water, energy, and resource use.



Sainsbury's will improve the sustainability performance of some products in response to Product Sustainability Forum research.

The Co-operative will work across its fresh potato value chain to prevent waste and eliminate GHG emissions; Nestlé will collaborate with its principal milk supplier in the UK; and Sainsbury's will focus on the environmental impacts of its meat, fish, poultry, and produce.

Ford Floats Sea Transport For India Car Movements

In a likely indictment of India's transportation infrastructure failures, as well as an indication of what auto manufacturers need to consider to keep supply lines fluid and transit times consistent, Ford Motor Company is exploring the possibility of shipping cars via water from its Chennai factory to the western part of India.

The automaker is building a new factory in Gujarat that will be operational in 2014, and says moving vehicles via ships is more efficient than navigating India's notoriously congested roadways. The move is also indicative of how much automotive companies depend on truck transport to move vehicles in India.

"Almost 99 percent of all cars in India today are transported through the road network; this is not efficient," says Stephen Harley, executive director, global material planning and logistics, Ford.

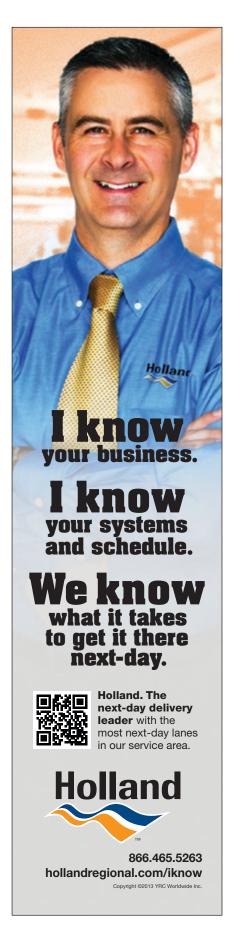
"In the United States, the most predominant mode of transport is rail. In Europe, it's the inland water system," he adds. "Even in emerging nations such as China and Brazil, other modes are being developed. We need that in India, too."

India currently ranks high in terms of logistics costs compared to other countries. Logistics and transportation accounts for almost 13 percent of the gross domestic product, mainly due to shipper reliance on the road network. The global average is eight percent.

"The lack of clean, congestionfree ports and multi-modal transportation options limits India's possibilities compared to other countries, such as Brazil," Harley says. "Somebody is paying for this inefficiency, and customers are bearing part of the cost."

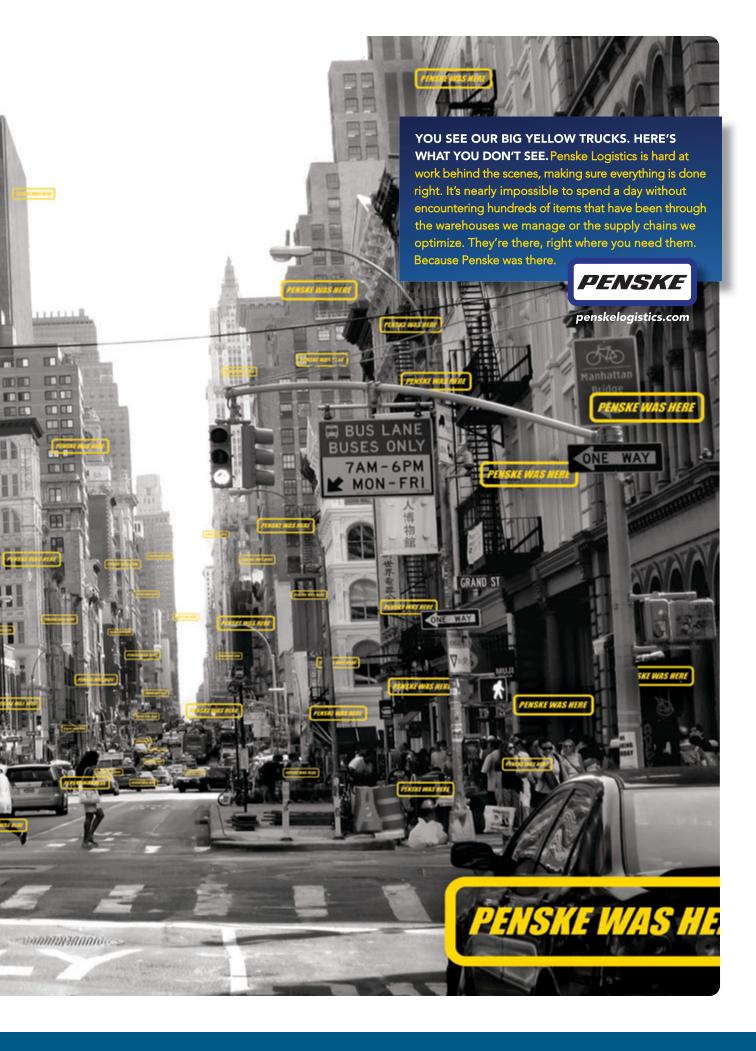


Ford wants to steer clear of India's congested roadways by using ships rather than trucks to move cars through the country.



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LEAN SUPPLY CHAIN

BY PAUL A. MYERSON

Managing Partner, LPA, LLC and author of Lean Supply Chain & Logistics Management. paul@psiplanner.com | 732-441-3879

Are Your Processes Adding Value or Waste?

ackaging helps protect and preserve products, but these days companies tend to over-package and over-protect. Excess packaging illustrates the waste known in Lean methodology as overprocessing. Added processing that doesn't bring value to goods or services in the customer's eyes creates unnecessary waste.

When trying to eliminate overprocessing waste, start by focusing on standardized work. The first step is creating standard operating procedures (SOPs). With today's technology, it is easy to create SOPs that include digital photographs of important steps in a process, as well as simple written instructions—often in more than one language. These SOPs should be easy to understand and follow, and kept in a visible place in the appropriate work area.

Developing SOPs can be incorporated into a Workplace Organization Kaizen event or part of the Standardize step (the fourth S in the 5S process). They reduce variability to improve quality and minimize unnecessary overprocessing.

The logistics and transportation sector presents many opportunities to reduce overprocessing. A good example is the value-added services typically performed by third-party logistics providers. These activities include assembly or kitting processes as part of a postponement strategy.

These value-added processes are often one-off events where little effort is put into developing SOPs and minimizing overprocessing. If we spend a little more time focusing on reducing non-value-added activities such as overprocessing, we can both reduce costs and improve quality.

Sharing Responsibility

In warehouses, overprocessing often appears in the form of overchecking. Using the Lean concept of Quality at the Source—which means quality is everyone's responsibility—workers can catch or correct issues earlier in the process, rather than at final inspection. As a result, they will significantly reduce this waste and improve quality.

Accomplishing this goal involves a concept known as Mistake Proofing to catch or prevent quality issues early in the process—even at the supplier. One useful tool in this regard is a Poka Yoke, which means to "fail safe."

This mechanism helps operators avoid mistakes and eliminate product defects by preventing, correcting, or drawing attention to human errors as they occur.

Putting more thought into preventing overprocessing during product development can help avoid waste from the start. The concept of Value Engineering involves improving design and specifications during the research, design, and production stages of product development.

Another important practice that can reduce overprocessing is Concurrent Engineering, which employs crossfunctional teams during the product development process.

For example, involving supply chain and logistics personnel early on can help avoid types of overprocessing that add unnecessary cost to shipping and handling due to extra weight or cube.

We can avoid much of the overprocessing found in our supply chain and logistics processes if we focus on it in the first stages—and the earlier in the process, the better.

Parts of this column are adapted from Lean Supply Chain & Logistics Management (McGraw-Hill; 2012) by Paul A. Myerson with permission from McGraw-Hill.



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BY KYLE GHOLSTON, CTB

Vice President, Conexus LLC gholston@conexuslogistics.com | 918-200-0179

6 Secrets to Finding the Right 3PL

o help mitigate a potential capacity shortage, many shippers are turning to third-party logistics (3PL) providers to help cover lanes that otherwise would be difficult to fill. If you are looking to partner with a 3PL, these guidelines can help you secure a beneficial service provider relationship.

1. Choose carefully. Until recently, Internet access and \$10,000 was all it took to get a broker surety bond and become a transportation broker. The U.S. Congress, however, recently passed legislation that raises the surety bond price to \$75,000, effective in summer 2013. This is good news for shippers, as the new requirements will likely be too high for fraudulent brokers to acquire a new surety bond.

You must, however, still do your homework. Ask 3PLs for customer references and a work history before entering into an agreement. If the company has been in business fewer than two years, consider moving on. The Transportation Intermediaries Association (TIA) is a good resource for qualified, legitimate 3PLs, because TIA requires all members to abide by a strict code of ethics when dealing with carriers and shippers.

2. Use 3PLs for more than just a back-up plan. Being choosy about 3PLs is wise, but don't treat them only as a back-up plan for a last-minute load that needs covering. A common misconception is that 3PLs can always move a load

at the last second. While 3PLs can often find the capacity needed in a pinch, it's not a guarantee, and you could be missing out on many benefits 3PLs can offer if you only use them this way.

Instead, treat 3PLs like any other carrier. Give your 3PLs an opportunity to service your typical lanes, and see how they stack up against your other carriers.

3. Ask what the 3PL does best. Like most companies, many 3PLs excel in certain niches, such as flatbed, less-than-truckload, or global shipments. Most companies started off focusing on one mode, then added others along the way.

Ask 3PLs about their mode and lane strengths. Depending on office and yard locations, a 3PL can likely guarantee capacity in some areas of the country, while offering substantially lower rates. This knowledge will help you better match your transportation needs to the right 3PL.

4. Use your 3PLs as solutions providers. One great thing about 3PLs is that you can use them as much or as little as you want. Use them as you would an asset-based carrier to handle only

specific lanes, or treat them as an extension of your supply chain. Many 3PLs can operate as an outsourced traffic department, and can manage as much or as little of the shipping process as you need.

5. Less does not necessarily mean more. When receiving quotes from transportation providers, consider more than just price. While 3PLs can often offer a substantial savings over asset-based carriers, consider the quality of carriers being used to move your freight. Ask 3PLs about their carrier selection process, and be wary of those that use conditional carriers. A good 3PL will, at minimum, make sure all carriers are insurance verified, and have a satisfactory safety rating, established business history, and authority that is in good standing.

6. Consider claims handling. Most 3PLs don't like to admit it, but accidents do happen—so make sure you're working with a 3PL who has your best interests in mind. A good 3PL can help facilitate a claim, and act as a liaison between you and the carrier on your behalf. Some 3PLs carry insurance so if the carrier defaults on a claim, the 3PL will step in and cover the cost of the claim—but this is not standard practice.

Ask the tough questions, learn your 3PL's policies, and get everything in writing so you set the proper expectations before you seal the deal.



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VIEWPOINT

BY LARS KLOCH

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Is Slow Steaming Good for the Supply Chain?

hen shipping lines began promoting slow steaming—operating ships at lower speeds to reduce fuel costs and carbon emissions—they highlighted its environmental benefits. Slow speeds reduce fuel consumption and, therefore, the output of harmful emissions, helping shippers reduce their carbon footprint and reinforce their green image.

Sailing ships at slower speeds does significantly reduce fuel consumption. Lowering engine speed by 10 percent cuts engine power by 27 percent, and reduces the overall energy needed for the voyage by 19 percent.

Shipping lines have widely implemented the slow steaming strategy of operating at 20 knots; some have even resorted to super-slow steaming at 15 knots. Slow steaming reduces shipping line costs, because it uses less fuel, and fuel comprises a huge share of operating costs. When oil prices were at their peak, fuel accounted for as much as 50 percent of the total cost of sailing a vessel.

If shipping lines are significantly reducing costs per voyage, shouldn't they pass on some of these savings to shippers? Some argue that in these difficult economic times, reducing costs is more of a priority than environmental benefits.

In fact, longer transit times can actually increase shippers' costs, because they need more inventory to feed this longer supply chain.

After considering factors such as depreciation and insurance, the added inventory costs shippers accrue when goods are on the water total nearly \$170 million, based on price-per-hour waiting time, according to a recent study by Rotterdam's Erasmus University.

The study also found that ocean carriers can achieve fuel savings of up to \$67 million through slow steaming—with \$6 million more saved if ships are slowed to 15 knots.

The bad news: even if shipping lines passed on 100 percent of the fuel savings, it would still not counteract shippers' increased inventory costs.

Longer ocean transit times can also impact shippers' cash flow, as the time from production to sale is extended. For some companies this isn't an issue, but it may cause problems for those that rely on an expedited cash flow process.

Still, shipping line customers may be able to use slow steaming to their advantage because of the one great benefit it does produce: reliability.

Slow steaming vessels are more likely to arrive at port on schedule. When a ship sails at full speed, it has no buffer time if it is delayed by weather or congestion at other ports. If it is slow steaming, however, the vessel can increase speed to make up the lost time.

For many manufacturers, retailers, importers, and exporters, supply chain reliability is more important than transit time or rates. Delivering as promised is the basis of most business success—it wins customers and ensures their loyalty.

Increased reliability also allows shippers to reduce the inventory they hold in the destination country—counteracting the increased inventory levels needed for slow steaming. Shippers can hold less buffer stock because they can be sure new stock will arrive on time.

Gauging the Effects

It can be complicated to determine the effect slow steaming can have on an individual shipper. It depends on many factors—from product type and volumes, to credit facilities and insurance terms, to destination and customer expectations.

One thing is clear: the answer lies in information. Only by understanding their true transportation and logistics costs can shippers make informed decisions, and develop the most cost-efficient and customer-focused supply chain.



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Thanks to business intelligence tools, companies are no longer awash in reams of data that they don't know what to do with. Instead, logistics managers are using BI technologies to find real meaning in their sea of numbers—and take actions that boost supply chain efficiency and effectiveness.

by Amy Roach Partridge

THE DEFINITION OF BUSINESS INTELLIGENCE (BI) DEPENDS ON WHO YOU ASK.

"An umbrella term that includes the applications, infrastructure, tools, and best practices that enable access to and analysis of information to improve and optimize decisions and performance," says research firm Gartner.

"Business intelligence is a set of theories, methodologies, processes, architectures, and technologies that transform raw data into meaningful and useful information," according to Wikipedia.

"Business intelligence is the use of computing technologies for the identification, discovery, and analysis of business data such as sales revenue, products, costs, and incomes," notes Techopedia.

Regardless of its definition, many companies today are embracing business intelligence tools. And BI has become a must-have for the transportation and supply chain sector. Business intelligence/analytics is the highest-ranked functionality requested by customers, according to a recent ARC survey of leading transportation management solution (TMS) vendors.

Several factors are driving the demand for BI within the transportation and logistics space. "Companies want more granular visibility to their transportation spend so they can manage and control it more effecmanagement solutions (WMS), and supply chain execution systems. While access to data is key, being able to find, understand, and use that data to make strategic decisions that improve supply chain effectiveness is crucial.

Turning Data Into Information

"Business intelligence allows companies to turn data into information—that capability is where we draw the line between standard reporting and BI," says Chris Johnson, vice president of research and development for LeanLogistics, a transpor-

Valley Proteins implemented Cadec's *PowerVue* solution to give fleet managers real-time, actionable information on driver performance, as well as pickup and delivery details.

tively," says transportation analyst Adrian Gonzalez. "They want to identify negative trends in costs and performance—and identify root causes—as early as possible to take corrective action. And they need to conduct 'what-if' analyses to evaluate the service and cost trade-offs of different transportation strategies and tactics."

Companies are most attracted to supply chain BI tools for their coveted ability to make sense out of the seemingly endless array of data that has become available through the continuing adoption of logistics technologies such as TMS, warehouse tation technology and solutions provider based in Holland, Mich.

"Historically, reporting has been about merely extracting data—getting it out of a system and into a spreadsheet or a database, where a company would then try to slice and dice it, and turn it into useful information," he adds.

Today's BI tools are taking that extra work out of the equation, offering up data in easy to understand and digest informational formats, presented in a more visual way. BI tools for supply chain users typically fall into three categories: 1. Reporting. Business intelligence reports are far more detailed and dynamic than in the past. "BI reports display all the data about transportation providers as usable information, in a scorecard format," Johnson explains. "Factors such as on-time delivery, tender acceptance rate, and meeting capacity commitments are assigned metrics and weighted averages to help users determine how well carriers are performing overall.

"The point is to use that information as a foundation for productive discussions with supply chain partners," he says.

2. Real-time dashboards. Managers and executives who want a quick, daily overview of what is happening in their transportation or supply chain network use dashboards, which provide information in near real-time to help users catch—and solve—problems as they occur.

"Dashboards make it easier for users to identify trends and exceptions, and to analyze specific components of their transportation operations more intuitively," notes Gonzalez.

LeanLogistics offers two standard BI dashboards for its TMS users (companies can also create their own): dispatch console and supply chain monitor.

"The dispatch console shows high-level information that gives a glimpse of business activity, such as: How many loads am I pushing through today? How many have been assigned to carriers? How many have appointments?" Johnson says. "The supply chain monitor is an exception-based tool that provides visibility to red flags such as loads that are supposed to be picked up tomorrow but haven't been assigned yet."

Dashboards also give companies the advantage of quick reaction time. "Because dashboards are updated as business is occurring, users don't have to wait for someone to compile and send reports. Therefore, they can react faster to changes in the market," says Cindy Winkel, vice president of data warehousing and business intelligence for Frisco, Texas-based 3PL and technology provider Transplace.

If, for example, capacity requirements are not being met on a certain lane, a



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website www.moduslink.com blog www.valueunchained.com contact info@moduslink.com dashboard makes it easy for users to spot tender rejects occurring within that lane, check into the problem, and possibly rebid the lane.

3. Benchmarking. Comparing data on factors such as freight rates and on-time delivery percentages against peers allows companies to get a more complete picture of their performance in the marketplace.

Take freight rates, for example. Rates have flexed up and down along with the economy recently, so nabbing a four-percent reduction in rates may seem like a good deal, until you compare it to others in the industry.

"If benchmarking identifies that rates

overall are down eight to 16 percent, then that four-percent reduction is no longer a good deal," Johnson explains. "Having access to that information allows a shipper to renegotiate with carriers."

Many companies are also using BI tools to highlight patterns found in historical data that may yield clues to future risks and opportunities in their supply chain or transportation networks. This predictive analysis capability uses real-time data-driven insights to speed decision-making and help create a nimble and responsive supply chain.

BI in Action

So how are shippers using BI to improve supply chain and transportation operations? Ultimately, it's about translating

the information provided by BI tools into actions that achieve goals such as improved supply chain efficiency, reduced costs, better customer service, or improved relationships and strategic partnerships with logistics vendors.

The methods shippers use to put BI information to work range from simple to complex. "Some shippers use BI tools simply to categorize their supply chain costs at a more granular level than they have historically," Johnson explains.

On the more complex side, companies can utilize BI tools to further drill down into the supply chain, and drive out even the smallest inefficiencies.

One shipper, for example, consistently netted a 92-percent on-time delivery rate for its loads, but wanted to get to the root of the problem dragging down the other eight percent of shipments. Was it the geography of the lanes? Not enough lead time? A problem with the carrier or the equipment?

With the help of LeanLogistics' BI tools, the shipper narrowed down the number of potential delay-causing variables, and determined the culprit was geography: loads in a handful of lanes were late more

A BI portal from Transplace provides home furnishings retailer Anna's Linens with transportation metrics to help managers make quick and efficient operational decisions, and rest easy.

frequently than loads in any other lanes.

"The company discovered that shipping from Point A to Point B in these lanes would always carry some risk," Johnson explains. "But having that knowledge up front let transportation planners narrow their focus to those likely points of failure."

In this example, the power of business intelligence opened up a variety of options for handling these late loads: the company could build in extra lead time for shipments in these lanes, or source those

customers from a different DC to avoid congestion, for instance.

"Going after the last 20 percent of the supply chain that might be functioning sub-optimally is where BI can really make a difference," Johnson says.

Better Decisions Through Data

Optimizing performance across the supply chain was a key factor in Anna's Linens' decision to embrace BI tools. The company, based in Costa Mesa, Calif., is the country's 14th-largest retailer of home textiles and décor items. A family-run business with more than 3,200 employees, Anna's currently operates roughly 320

stores in more than 20 states.

The company uses a business intelligence portal from Transplace to access a suite of reports and dashboards that provide clear visibility to its transportation performance.

"We have access to more than 50 different metrics and key performance indicators via the Transplace BI portal," says Miles Tedder, senior vice president of IT and supply chain for Anna's Linens. "They encompass most, if not all, industry standard transportation metrics such as tender, acceptance, delivery performance, volume, cost, trends, service levels, length of haul, cube per load, and weight per shipment.

"The data is presented in a comprehensive set of formats—graphs show trending

visibility, and radial dials display performance within ranges—based on type of data, data elements, and how we analyze them," he explains.

Delivering this BI data via real-time dashboards and reports makes it easier for Tedder and his team to use the data to make operational decisions quicker and more efficiently.

"The depth and frequency of data available from Transplace provides us the

continues on page 46



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The 6 Best BI Modules For Transportation Management Systems

What factors comprise a good business intelligence (BI) module in a transportation management system (TMS)? Here are six capabilities to look for:

1. Role-based Thinking: Roles include transportation planners, managers tasked with making sure carriers are paid accurately, executives who monitor adherence to transportation goals, and the vice president of logistics who has to put together the annual transportation budget.

But external touchpoints also involve people outside the transportation department, such as the manager tasked with transportation-related environmental, health, and safety performance, or people involved in the sales and operations planning process (longer lead times mean increased safety stock).

2. Holistic Data Sources: Not all the data needed for the BI module will come from the TMS. For example, some suppliers are beginning to import the Department of Transportation's CSA database into a business intelligence engine, then presenting near real-time analytics to shippers who want to work with safe carriers.

Because transportation is an inherently collaborative process, EDI data quality (i.e., whether carriers are sending shippers timely and accurate electronic messages) is another important set of carrier metrics. For traditional TMS solutions, architected to be deployed in-house, this is an external data source. For single-instance, Software-as-a-Service (SaaS) solutions, it can be internal to the TMS vendor's data set. Some network-based solutions are also starting to provide benchmark data on rates.

3. Root Cause Analytics: Common carrier management metrics include tenders refused by carriers on a particular lane, or the number of billing discrepancies. But are these metrics fair? If a shipper gives a carrier only one day to respond to a tender, then, logically, there should be a higher percentage of loads turned down compared to if a carrier is given five days' notice. Similarly, a rate curve analysis can help show why tenders are refused.

Another common carrier metric totals the number of billing discrepancies between a carrier and shipper. The implication of this is that carriers with a high number of discrepancies are less honest. However, if shippers can drill down into the accessorial costs, then to unplanned accessorials, then to demurrage by location, they might find that one of their sites consistently makes carriers wait many hours to unload.

4. Embedded Analytics: As the TMS collects information, the data is analyzed and the results fed back into the solution. These results are then used to alter processes automatically in response to changes.

For example, carrier performance may be fed back into the carrier selection process to change the ranking of certain carriers. The information gathered through the execution process helps the system adapt automatically to changes as they occur.

It is often not enough to find a problem; companies also need to enforce behaviors that alleviate it. The more automated this can be, the more money companies can save.

- **5. Landed Costs:** A TMS provides good data on the transportation components of landed cost. Most companies want to know their true profitability by product and customer. Accurate transportation costs are an important input to that calculation. A BI module that calculates this based on finalized freight audit data, and thus includes unplanned accessorials, will be more accurate than a system that uses projected costs coming out of the tendering engine.
- **6. Follow the Money:** No BI module will have everything. What is most important? Follow the money! A TMS can provide data for better procurement; allow for better mode selection, load consolidation, routing, and load building; and can help minimize carrier overcharges.

These are the main ROI buckets. Metrics that document the savings from these activities allow users to see if they are making progress or going backward, and provide insights on root causes.

Many factors go into making a TMS cutting edge: end-to-end process coverage across all modes, the power of its optimization engine, and a flexible architecture, among others. But more and more, it is business intelligence that differentiates one TMS solution from another.

SOURCE: Transportation Management Systems Worldwide Outlook, ©ARC Advisory Group







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necessary basis for process decisions and strategy evaluation," Tedder explains.

For instance, the BI data called to management's attention a drop-off in delivery performance that occurred in a certain lane within a short time. Examining this red flag closer, the company decided to change carriers to fix the problem.

"We were then able to monitor performance to make sure it improved, and see if we incurred any costs associated with the change," he says.

"Managing by exception is better than mining for data," says Owen Smith, senior vice president, product strategy for Cadec, a fleet management solutions provider based in Manchester, N.H. "Businesses that have utilized TMS for years, and are used to searching through reports for relevant data, experience a cultural and conceptual shift when they adopt BI tools."

That was the case for Valley Proteins—a Winchester, Va., company that recovers, renders, and recycles animal by-products—when it began using Cadec's BI tools. The

To ensure its fleet is operating at maximum efficiency, Valley Proteins counts on the business intelligence provided by Cadec's *PowerVue* tool. Exception-based reports, such as planned-vs.-actual routes, help Valley Proteins managers quickly flag drivers that have taken too long or made too many stops on a certain route.

"Using these reports frees our managers from worrying about drivers who might be a little off on a route, and allows them to quickly find the drivers that went, say, 150 miles in 14 hours when they were supposed to do 100 miles in a 10-hour day," Battista explains.

"We can drill down into these exceptions to find out what is going on—did the dispatcher plan a poor route or did the driver incur extra miles by going off route to eat lunch at a favorite location?" he adds.

"Businesses that have utilized TMS for years, and are used to searching through reports for relevant data, experience a cultural and conceptual shift when they adopt BI tools."

-Owen Smith, senior vice president, product strategy, Cadec

Having the BI data has also kept the company from over-reacting when issues arise that do not signal a larger problem in the supply chain. Sometimes, Tedder notes, exceptions are just that—exceptions.

"One store may receive a late delivery due to any number of issues," he says. "With BI capabilities, we can determine if one late delivery is just that, and not a broader issue. It also allows us actionable visibility to performance and cost information, enabling us to optimize our results. Without the BI portal, we'd have to devote time and resources to sifting through a lot of data."

Say Goodbye to Data Mining

Tedder's observation about saving time is right on target. The switch from sifting through data to find problems or trends to having relevant, exception-based data pushed directly to users is one of the biggest advantages of BI tools. It is a near-revolutionary change in the way companies approach data—and in some cases, the way employees do their jobs.

company, which operates 22 facilities and a fleet of roughly 450 trucks, began using Cadec's *PowerVue* solution in 2012 to give fleet managers real-time, actionable information on fleet and driver performance, as well as pickup and delivery details.

"Our employees were used to data mining. 'Let's dig into the data and see what's going on' was our culture for years," says Paul Battista, Valley Proteins project manager. "Now, with BI, we receive exception-based transportation information, which gives us more time to manage drivers instead of searching for data."

Freeing up time to manage drivers is particularly important to Valley Proteins because the company operates two distinctly different sides of the business.

"We do street-level routing, where our drivers pick up products at restaurants, grocery stores, and small slaughterhouses; we also deliver full truckloads of products," Battista explains. "These are two completely separate operations that have to be managed separately because the drivers are performing different tasks."

Dealing With Red Flags

When red flags such as these pop up, the company now has an easier way to analyze the data, address the issues with drivers and/or dispatchers, and determine which options it should take as corrective action.

"We look at these exceptions case-bycase," Battista says. "Sometimes we have to make a change in our dispatch operation, and sometimes a change in driver behavior is necessary."

Battista also reports a greater level of efficiency within Valley Proteins' fleet as a result of the *PowerVue* solution and the BI it delivers. "Being able to optimize routes and driver behavior as a result of the real-time data we get from our fleet management system has been beneficial," he says. "We never had this kind of insight into our fleet."

Insight may be the best word to describe the power of business intelligence. By gaining insight into the inner workings of their supply chains through specific, detailed, and actionable exception-based information, companies are making strategic changes to transportation and logistics operations in real time. The end result: greater supply chain efficiencies, cost savings, and operational improvements. If that's not intelligent, what is?



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Stonyfield

A LEANer Greener Supply Chain Increases Profits and Reduces Carbon Footprint. Stonyfield had its start in 1983 when Gary Hirschberg and fellow organic farmer and environmental advocate Samuel Kaymen began selling small batches of plain, all-natural yogurt made from the milk of seven Jersey cows. Who could have dreamed then that Stonyfield Farm would become the nation's largest and fastest-growing organic yogurt company – and the third largest overall? One key to the company's success is its increasingly green and ultra-efficient supply chain.





Today, the company's mission is to provide the highest quality, best tasting, all natural and certified organic products. Staying true to its environmental roots, the company's organic business helps support hundreds of family farms, keeping 180,000 agricultural acres free of synthetic fertilizers, pesticides and chemicals. The philosophy that drives Stonyfield? Going green isn't just the right thing to do. It's a great way to build a successful business.

Given Stonyfield's use of organic sourcing, solar energy and recycling, it's not surprising that this passionate commitment to environmental stewardship has driven major improvements in the company's supply chain that have not only reduced its carbon footprint, but reduced costs and boosted efficiency.

Destination: a greener supply chain

"Even though we were the first manufacturer in America to offset 100 percent of the CO2 emissions from our manufacturing plants, these incredible offsets amounted to a rounding error in terms of our total carbon footprint." These are the words of Gary Hirshberg, President and CE-Yo of Stonyfield. "We realized that our supply chain — what's coming in and going out of our plant — represents 80 to 90 percent of our total carbon footprint. So, despite the great things we did in our plant, unless we tackled our supply chain's carbon footprint, we were nowhere."

Automating bill processing: from a sea of paper to a model of digital simplicity

In 2006, Stonyfield partnered with Ryder's Supply Chain division to do just that. The first step was to automate an



AT A GLANCE

Challenge

Streamline a complex inboundoutbound transportation network, reduce costs and increase efficiency, while further decreasing the carbon footprint of the company's supply chain.

Solutions

A green, Ryder dedicated model, an integrated transportation management solution and expansion to a new warehouse, including automated yard management and implementation of LEAN methodologies.

Benefits

- ► A 58 percent reduction in the supply chain carbon footprint
- ➤ Overall annualized cost avoidance of \$200,000 from LEAN process implementation
- ► 10 percent increase in employee productivity
- ➤ Ongoing improvements in quality and reductions in waste, variation and loss
- ▶ Improved customer service
- ▶ A high degree of visibility into materials and inventory



unwieldy paper-based billing and payment process, eliminating the man-hours and reams of paper it consumed. Stonyfield implemented Ryder's freight bill audit, payment and carrier management service to enable electronic data interchange (EDI) transmission of invoices. Within a month, most of Stonyfield's carriers had replaced manual freight billing with electronic processes. Ryder also helped Stonyfield streamline freight payments. Before, Stonyfield received paper invoices from carriers every time a truck shipment was tendered. Staff members spent hours manually coding invoices, entering data, putting invoices into financial systems and cutting checks. With the automated system, Stonyfield receives one weekly invoice from Ryder instead of thousands of paper invoices from multiple carriers.

A closer look at the transportation network

Next, Stonyfield re-evaluated its transportation network. Leveraging data mined from the electronic freight bill processing system, Ryder conducted an in-depth analysis of Stonyfield's network. The idea was to shrink mileage and the company's carbon footprint while continuing to service the distribution centers and facilities supporting grocery, natural food, club store and foodservice customers.

The solution? An intelligent, end-to-end transportation management solution - and consolidation of multiple individual shipments into more efficient multi-stop routes. The impact was almost immediate. Stonyfield increased product weight shipped per truck, decreased miles traveled, achieved new levels of operational efficiency and reduced costs and CO2.







With full visibility into its truck yard, Stonyfield knows the location and status of every trailer at any given time. Automated yard management enables Stonyfield to use resources more effectively with less environmental impact.





Ryder Dedicated: fast track to a greener fleet

One key to reducing the company's carbon footprint was migrating much of Stonyfield's private fleet to a Ryder Dedicated fleet. Today, Ryder trucks with green engine technology and drivers trained for fuel-efficient operation haul raw materials into the plant and service customers within a 250-mile radius.

Every tractor in the dedicated fleet complies with specifications identified by the U.S. Environmental Protection Agency's (EPA) SmartWay Transport Partnership program, a collaborative venture focused on increasing energy efficiency and decreasing greenhouse gases. By consolidating shipments and migrating to a low-emissions dedicated fleet, Stonyfield realized even more environmental and cost-saving benefits.

"By automating the billing and payment process and migrating to a dedicated fleet, Stonyfield's Director of Logistics, Ryan Boccelli could focus on higher-impact initiatives," notes Mark Swenson, Vice President of Business Development for Ryder Supply Chain Solutions.

Larger fleet. Smaller carbon footprint.

The first of those initiatives was a fleet optimization project that migrated more common carrier trucks to a dedicated fleet model. "We doubled the size of the dedicated fleet," recalls Boccelli. "In so doing, and combining that with our removal of LTL from our network, we reduced C02 metric tons per product shipped by a total of 58 percent. Ryder dedicated also enabled us to expand our service and meet customer requirements with more agility."

Automated yard management boosts productivity

Next up - automating yard management. "Instead of spending time moving trucks around, our employees can focus on their core tasks," says Boccelli. "With full visibility into the yard, we know the location and status of every trailer, whether it's inbound, outbound, at the dock door or ready for dispatch."

Because Stonyfield transports perishable, organic products in temperature-controlled trucks, automating yard management yields a critical advantage. "Our trailers' refrigerated units burn a gallon of fuel per hour. With better yard management we don't have to worry about those trucks sitting idle burning fuel," says Stonyfield Senior Logistics Manager, Kevin Connors. "We're managing the truck yard and using our resources more effectively, with less environmental impact."

A new distribution center improves customer service

To keep up with growth and improve customer service, Stonyfield engaged the Ryder team to identify strategic locations for additional facilities. Carbon footprint impact was central to the analysis, along with mileage and cost reductions. "Stonyfield was running out of capacity in Londonderry," recalls Swenson. "We ran several distribution center network and warehouse implementation studies, factoring in changing product volumes, customer mixes, geographies and SKUs. The location we came up with was Allentown, Pennsylvania."

Stonyfield selected Ryder to set up and run the Allentown warehouse, hire a management team, bring



in employees and train them. "Adding the warehouse in Allentown enabled us to reduce lead times," Boccelli points out. "We can turn product around faster and that's had a positive impact on customer service."

Truck driver relays keep trucks rolling

Once it was up and running, Stonyfield had to stock the Allentown warehouse with inventory from Londonderry. Because Stonyfield yogurt and ice cream products are organic and free of chemicals and preservatives, moving products from Londonderry to Allentown posed a challenge. To accelerate transit time, Ryder set up driver relays. "We station two tractors and four drivers at a remote domicile midway between Londonderry and Allentown," says Swenson. "One driver arrives at the midpoint from Londonderry with a loaded trailer. The next driver gets in the cab with a fresh set of driving hours and heads to Allentown. We close the loop by picking up inbound freight headed for Londonderry from a nearby co-packer."

The result? No idle time, no empty miles and huge operational and environmental benefits. "The driver relays extend the shelf life of products like yogurt and ice cream," Boccelli points out. "There's less obsolescence, spoilage and inventory carrying costs because of the faster transit time."

Ryder helps Stonyfield formalize a LEAN Culture

With a vastly smaller carbon footprint and improved fleet efficiency, Stonyfield was ready to take supply chain performance to the next level. The company's overarching vision was to become a \$500 million organization by 2015 and Stonyfield's leadership knew LEAN was the most direct route.

Characteristics of LEAN processes include short cycle times, quick changeovers, continuous flow work cells, less variation and continuous improvement. LEAN continuous improvement is grounded in the precept that employees know their jobs best and, given the right



tools and training, can play a key role in making improvements.

"LEAN is about more than identifying waste," states Ryder Director of Lean Supply Chain Solutions and Master Black Belt, Will Johnson. "It's about thinking differently and encouraging employees to look for ways to improve their work lives every day. This approach was a natural for Stonyfield. They went through two days of Red Belt training, took what they learned and started integrating it into their culture from day one."

"We trained them on the fundamentals of LEAN principles, operations, tools and the Plan, Do, Check, Act problem-solving methodology," says Ryder Director of LEAN Supply Chain Solutions and Master Black Belt, Will Johnson. "They learned how to go to the floor, identify root causes of problems and apply countermeasures to resolve issues and mistake-proof processes."

Excited with initial successes resulting from the Red Belt training and value stream mapping, Stonyfield engaged Ryder to engrain a formal LEAN culture. "They asked us to come in and train eight employees for Green Belt certification," recalls Johnson. Each employee completed 80 hours of Green Belt training and a year of mentorship under a certified Black Belt. "Most Green Belt projects take between one and three months to complete and save from \$30,000 to \$80,000."

The aim of the Green Belt projects was to minimize wait time, reduce unnecessary inventory, eliminate defects that would result in rework or scrapping and







Together, Ryder and Stonyfield supply chain teams are implementing improvements to streamline processes by minimizing wait time, optimizing the flow of goods from one process to the next, and eliminating defects or quality deficiencies that would result in rework or scrapping.

minimize handling as goods move between processes.

A stroll around the Stonyfield floor is proof positive that LEAN principles are in full swing. "We have a mission control board to explain what we're doing and why and how we're doing it, along with leadership, suggestion, feedback and success boards," says Jim Olsen, Stonyfield Supply Chain Project Manager.

"LEAN helped us create a bottom-up culture," Boccelli adds. "The people on the floor drive Stonyfield's LEAN improvements. It's very rewarding because they're really empowered to own the processes."

Empowered employees, LEANer processes and cost-effective operation

Already the initial eight Green Belt projects are delivering significant results. Stonyfield estimates that LEAN processes are helping the company avoid \$200,000 in costs annually. Morale is up, waste has been eliminated from all eight affected processes and products are moving more efficiently.

"The secret to a successful LEAN deployment is leadership commitment," says Johnson. "Stonyfield was I 20 percent committed to the process from the start. Ryan and his team demonstrated great leadership and truly embraced engaging employees in the process. These projects are a success in large part because of the leadership commitment to driving improvement across the company."

Today, Stonyfield is looking at rolling out LEAN training to other areas of the company. "Our goal is to grow revenues by 35 percent by 2015," says Boccelli. "We plan to leverage Ryder LEAN methodologies to grow into our goal rather than adding complexity. With a LEAN approach and engaged workforce, I'm confident we can get there."



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THE TOP

LOGISTICS IT PROVIDERS & MARKET RESEARCH SURVEY

Inbound Logistics reveals the latest logistics technology trends influencing the supply chain sector — and 100 companies that are breaking new ground and leading the market.

by Joseph O'Reilly

Big data has hit logistics with a bang—and for good reason. Given the breadth and depth of global supply chains, the explosion of function- and vertical-specific logistics technologies, the collective power of social media and cloud computing, and a continued emphasis on cost reduction, there are few limits to how granular shippers can take analysis. What emerged as a byproduct of data-mining business intelligence systems is now sweeping the supply chain sphere, creating new expectations for logistics managers and technology vendors alike.

Information is power, and companies are quickly appreciating the value they can distill by harvesting and harmonizing mass quantities of data across the supply chain, and providing a common platform for unique departments and business partners to collaborate around.

Big data also creates challenges. With so much information accumulating in and coursing through various functions within an organization—and among external partners—there is equal need for human and artificial intelligence that can make sense of this miasma.

Context also counts. A wealth of subjective information provides little value when a company is looking for contrast. Logistics managers need to bounce and benchmark data off external market intelligence and historical performance to find areas for improvement. Big data creates an intelligence vacuum that needs to be filled within an organization, through technology suppliers, or via third-party resources.

Inbound Logistics' annual logistics technology issue serves a similar purpose. Our research and analysis provides a landscape perspective of how technology companies are approaching the market, where they are investing in development, and the challenges they see through their customers. As always, our Top 100 Logistics IT Providers list accompanies this market overview, providing a dot-matrix sketch of solutions providers *IL* editors have chosen as best in class.

Surveying the Logistics IT Landscape

Companies seeding the cloud with logistics technology in the mid-2000s created a deployment model that has now become standard. Five years ago, 10 percent of surveyed technology vendors offered some form of locally installed product. In 2013, that number is half. Thirty-six percent of companies provide hosted solutions (versus 27 percent in 2009) while the majority—59 percent—offer a combination of both.

Hosted solutions provide IT buyers more flexibility and scalability in how they opt to use the technology. On-demand applications also raise expectations by expediting lengthy implementation cycles—once a considerable barrier for smaller IT buyers.

There has been a similar progression in how developers price their product. System-based cost structures remain the prevailing option (76 percent), while transactional, pay-as-you-go subscriptions continue to grow (64 percent in 2013, compared to 51 percent five years ago). Sixty percent of surveyed technology companies offer per seat/user pricing.

For these reasons, the technology market has become increasingly accessible to companies of all sizes. Variable cost and deployment models have made initial investments much more palatable for small and medium-sized businesses (SMBs). Moreover, Software-as-a-Service eliminates maintenance and upgrade expenses associated with legacy systems. The technology market that has emerged is increasingly utilitarian in its customer segmentation. Only 10 percent of surveyed vendors specifically sell to large companies; 15 percent exclusively target SMBs. The overwhelming majority (86 percent) serve both.

A more telling indicator is the industries technology companies serve. Because many smaller shippers do not have the personnel to properly collect, digest, analyze, and execute against big data, they are relying on third-party logistics companies.

This has created new traction for IT vendors to sell to service providers (see Figure 1). Ninety-two percent of companies surveyed serve 3PLs, warehouses, and carriers, followed by retail

Industries Logistics
IT Providers Serve

Manufacturing

Miolesale

6-Business

Periods of the Strong of the Strong

(83 percent), manufacturing (81 percent), and wholesale (75 percent). And, at 51 percent, e-business represents an opportunity for solutions developers as e-commerce continues to shape a new trajectory for supply chains.

Sensing New Demand

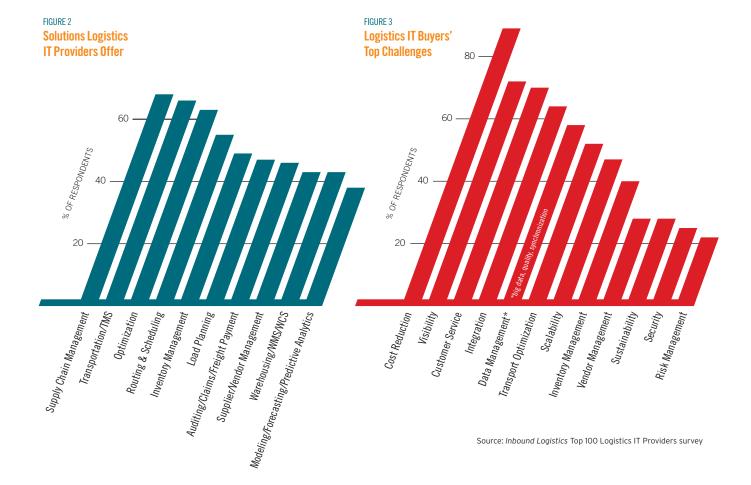
The maturation of logistics technology and the means of deployment created a stratified and balanced market. Supply chain management (68 percent), transportation management (66 percent), optimization (63 percent), and routing and scheduling (55 percent) comprise the top tier of offered solutions (see Figure 2).

Shippers are tasked with converting the supply chain from a cost center to a profit center. "The supply chain becomes more of a value chain, and the cost of logistics and transportation is one primary element to evaluate," shares one survey respondent.

Functional solutions allow companies to optimize and reduce costs with a degree of specificity. The key, then, is linking these unique areas within the broader supply chain. This is where cloud networks empower technology deployment by blending visibility and data so companies can drive efficiency and tear down walls across siloed functions.

Cost reduction and visibility remain the two greatest challenges for IT buyers (*see Figure 3*), according to 89 percent and 72 percent of respondents, respectively. Visibility and integration depend on one another, and the swift emergence of cloud networks, social media, and big data have created a more complex IT ecosystem to navigate. Optimization, in all its forms, is a means to eliminate redundancies and standardize transportation and logistics processes. Technology is increasingly embedded in these processes—not just tacked on—so integration becomes that much more important.





Solutions are also becoming more customizable, with greater emphasis on bundled packages or managed services — which plays into the value proposition of many 3PLs. IT vendors are following suit, further blurring the lines between service provider and solutions developer. This trend is readily apparent inside the warehouse, where materials handling integrators are helping companies mine synergies among equipment, mobile devices, and warehouse management systems to find the best solution.

E-commerce is a major contributor to this change. Consumer expectations for product availability and timely service are changing at broadband speed, and supply chains need to keep pace. This extends to other verticals as well — notably retail. The capacity to quickly identify demand changes or supply chain exceptions—and act on these changes—is a competitive differentiator that requires synchronization across industry and functional areas.

These needs place greater pressure on companies to better capture point-of-sales data, forecast demand, and manage inventory. It forces them to rethink omni-channel fulfillment. More consumers purchasing product online inevitably impacts returns. Reverse logistics solutions will grow in importance. Currently, 35 percent of IT companies provide this capability.

Big data is also changing the way companies approach supply chain design. Network optimization is a fluid exercise for many companies—at home and abroad. Changing demand patterns, lane rate analysis, new sourcing locations, port strategies, contingency planning, economic trends, and even sustainability mandates have raised the importance and value of predictive analytics. Thirty-eight percent of IT vendors provide modeling and simulation capabilities that allow shippers to better visualize their supply chains.

THE TOP 100

Every year, *IL* editors comb through more than 200 questionnaires and conduct research online and over the phone to identify the Top 100 logistics and supply chain technology vendors in the market. The selection process is an exercise in big data management, as we vet subjective questionnaire information against external criteria to identify companies that demonstrate excellence. We look for companies where logistics and supply chain technologies are core, and where customer successes are documented and celebrated. Turn the page and browse the 2013 list of Top 100 Logistics IT Providers.

Do you agree with this year's Top 100 selections? Let us know at editor@inboundlogistics.com

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made4net.com	201-645-4345																							
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Navegate navegate.com	651-361-8725						•			•				-					•	•	•	•		
NGC Software ngcsoftware.com	305-556-9122						•				•									•				
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One key step to finding answers to any logistics, supply chain, or technology challenge is knowing the right questions to ask.

Inbound Logistics assembled a team of supply chain and logistics technology leaders, and asked for their perspectives on the important logistics challenges and opportunities impacting your business.

More importantly, these logistics thought leaders can give you guidance when considering improvements to your business processes.

JIM PREUNINGER

CEO, Amber Road

RICK ERICKSON

Global Transportation Product Director, Syncada from Visa

SCOTT VANSELOUS

Executive Vice President,

Marketing, TMW Systems

KERRY LOUDENBACK

Vice President - Sales, TransportGistics Inc.

NICHOLAS CARRETTA

President, Ultra Logistics

MITCH WESELEY 75

CEO, 3Gtms

SHANNON VAILLANCOURT 76

President, RateLinx

TRACEY LEONARD

Vice President, Global Trade Solutions, Choice Logistics

Building an Effective Import Compliance Program

Q: How do shippers create an importing program?

A: Meeting import control obligations need not be a painful experience. Proactive import compliance planning and governance will minimize the risks and negative consequences of non-compliance.

First, understand current import laws and regulations. Familiarize yourself with government policies and procedures prior to actually importing your goods. You should also be aware of any entry requirements specific to the particular commodity you are importing.

Second, articulate and circulate a compliance program to educate staff.

Third, facilitate implementation with administrative support and technology tools. By providing easy access to appropriate technology-based tools and processes for everyone involved, you'll facilitate consistent implementation of your import compliance program.

Q: What practices can facilitate implementing an importing program?

A: An import compliance plan is of little practical value unless implemented consistently across the enterprise. But the requisite due diligence screening of restricted

parties, recordkeeping, monitoring, review, and audit processes can make compliance tedious and time-consuming. Rapidly changing restricted-party lists further complicate the process.

With the appropriate groundwork, every institution can deploy a technology solution that facilitates and dramatically improves process efficiency and accuracy. Improved efficiency also enhances the likelihood that employees will comply consistently.

Some best practices to consider while creating an import compliance program include: establishing a clear position on governance; implementing continuous risk assessment; creating a written compliance guidance manual; establishing internal recordkeeping, review, and audit processes; implementing screening protocols; automating the import compliance process; and highlighting the penalties for non-compliance.

Many first-time importers consult a licensed customs broker for help filing entries, particularly if they find the process complicated. Remember, however, that even when using a broker, the importer of record is ultimately responsible for the accuracy of the entry documentation and all applicable duties, taxes, and fees.

Q: What should companies look for in a technology solution?

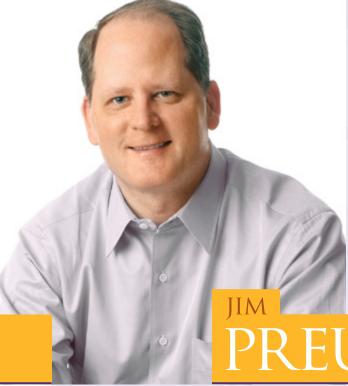
A: As with all technology, finding the best fit is important. Here are a few qualities to look for in an import compliance solution: ease of deployment, preferably available using a subscription-based, on-demand model; ease of use, including multiple integration points with other in-house systems; accurate and real-time content updates from government sources; and fully automated and comprehensive screening against active global government-issued denied-party lists.

A good technology solution should also have advanced tools to identify controlled technologies and determine import license requirements for all possible scenarios; flexible restricted-party screening rules; and backing from a provider with proven experience in global trade management, automation, and trade compliance solutions.

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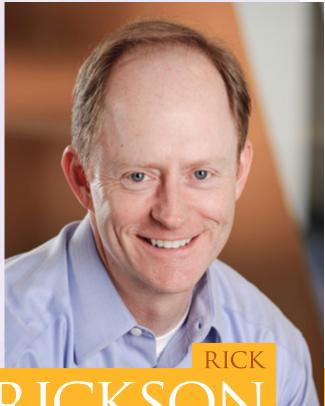


Connect and Collaborate to Better Manage Freight Spend

Q: What are the current challenges of managing freight spend?

A: In today's slow-growth economic environment, organizations are pressured to reduce costs and manage inventory well. The result is demand for frequent deliveries, which amplifies the need to control shipment costs, according to research by the Aberdeen Group. In addition, organizations operate increasingly complex supply chains that reach around the world.

Many companies have divisions or suppliers—or both—in different countries. That makes managing freight spend and payments challenging, because rules and regulations vary by geography. Frequently, organizations use different local freight audit and payment systems that do not connect to each other or to financial management systems. Only 36 percent of companies have a centralized spend management platform with multi-currency and multilingual capabilities, according to a 2012 study by the Aberdeen Group. This "silo" approach makes controlling freight spend difficult—and the outcomes are costly.



Global Transportation Product Director Syncada from Visa

ERICKSON

Q: Why are silos a problem?

A: While a silo approach makes sense from a local perspective, it's a barrier to managing total freight spend. Most global views are a summary of freight spend, yet they lack the detail to analyze freight spend based on supplier or product line across the organization.

For corporations managing freight spend in geographic or divisional silos, putting that analysis together is time-consuming. It is more difficult if each system is not capturing all the data necessary for the analysis—or not capturing it in the same way. Companies waste time and money managing inefficient, disconnected systems.

Q: How can shippers address these issues?

A: Supply chain professionals benefit most from a global solution built for freight spend. But, buyer beware: many providers claim to be global without "feet on the ground" in other regions, or while servicing only one customer in another country.

Only consider solutions that:

- Connect with true local resources who understand the local regulations and logistics industry.
- Support your growth with multi-currency and multilingual capabilities.
- Accommodate local requirements, such as consolidated invoices, value-added taxes, and government-compliant e-invoicing.
- Provide the right data in the right format by capturing all relevant data and ensuring data harmonization for important information such as currencies.
- Properly control access to data. While not all users need access to all data, they do need access to the right information—which may include data across several entities for analysis.
- Efficiently allow access to global reporting and business intelligence.

By seeking a global solution with these attributes, organizations can better manage freight spend, regardless of geographic or divisional boundaries.

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Truckers and Shippers Prepare to Meet Over-the-Road Challenges

Q: What challenges do domestic transportation service providers face today as a critical part of the value chain for manufacturers and retailers?

A: One of the most competitive segments of the trucking market, truckload (TL) companies also represent the core business of most asset-based, but diversified, transportation companies. Their most common con-

The availability of qualified drivers — more than access to credit, industry freight rates, or competition from rail — is likely to be the single greatest constraint on the trucking industry in expanding to meet the demands of a resurging economy.

Unlike prior boom-and-bust economic cycles following trucking industry deregulation, rising freight rates are unlikely to draw enough new startup carriers to the industry to increase capacity and shift pricing power back in favor of shippers any time soon. There simply will not be enough drivers to fill the additional trucks. Much of our product R&D now is going into tools that help carriers visualize and consistently improve utilization.

Q: Will there be any major changes in transportation industry dynamics soon?

A: The Federal Motor Carrier Safety Administration's March 2013 announcement that it would not delay enforcing a July 1, 2013, start date for a highly controversial change in Hours of Service (HOS) rules for commercial truck drivers—despite pending court challenges to the new rules from industry—set conditions in motion that will have far-reaching effects for shippers.

Industry observers have already remarked that importers and exporters should focus on highway—not ocean—transportation challenges this year. Capacity for over-the-road trucking will contract further when

SCOTT

VANSELOUS

Executive Vice President, Marketing TMW Systems

cern, according to a recent survey of over-the-road, long-haul truckload carriers, is maximizing asset utilization—increasing the revenue-generating ability and productivity of their existing trucks.

In addition to utilization, recruiting and retaining qualified drivers represents a major concern for carriers. An aging population of commercial drivers is fueling this concern, with more driver attrition prompted by negative CSA scores, and low numbers of new drivers entering this increasingly regulated job category.

the new HOS rules take effect in July 2013, and the truckload carrier segment is likely to experience productivity cuts of three to five percent—if not more—as a result of compliance. Freight networks may need to be re-engineered to accommodate curtailed driving hours, and more freight may shift from TL to less-than-truckload carriers.

The net effect for supply chains from the new HOS rules imposed on the trucking industry will likely be to lengthen them even more than slow-steaming has. Upward pressure on truckload rates will contract 3PL margins and take a larger bite out of shipper budgets.

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Transportation Management: A Layered Approach

Q: Why bother managing the inbound aspect of the supply chain?

A: Historically, organizations built their transportation management strategies and tactics around the outbound aspect of their supply chain. The gravity of customer revenue pulls the attention in that direction. This inattention in the supplier direction often leaves the inbound supply chain exposed to margin-draining activities.

By setting expectations with trading partners about how product should be routed, documented, and prepared for shipment, the organization is set up for the most efficient induction of materials into the enterprise. Establishing business rules by publishing policies and tactical instructions is an effective extension of the purchasing contract.

In addition to publishing policies, integrating a cloud-based solution that facilitates bi-directional communication between trading partners will create a dynamic portal for interfacing the inbound supply chain.

Q: Is a TMS right for my organization?

A: At the core of any effective layered approach is the transportation execution engine. Commonly referred to as a transportation management system (TMS), this solution provides the ability to accurately predict shipping costs and manage shipment execution.

While traditionally used on the outbound or downstream aspect of the supply chain, a comprehensive TMS solution offers the ability to add functionalities such as managing inbound shipments, serving as an RFP analysis tool, or facilitating real-time spot market quoting for appropriate modes. The benefits of cloudbased TMS have been lauded and extolled extensively, but the power and simplicity for an organization to easily plug into a comprehensive solution organically cannot be overstated.

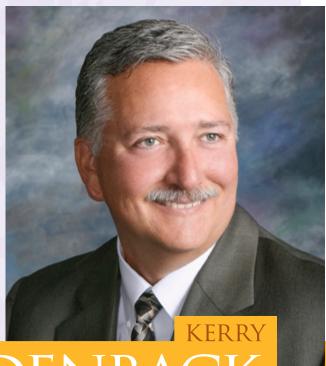
Q: How can businesses close the transportation data loop?

A: Having the solutions mentioned above in place is a good start, but measuring transportation execution

performance allows the enterprise to gauge the effectiveness of their controls. Certainly freight audit and payment systems come to mind as an example of these systems, but the opportunity for transportation data analysis extends beyond traditional freight audit and payment functionality. Businesses of all sizes must exert control over the ever-increasing costs of transporting goods by gathering and analyzing the data that is available.

If we consider that the transportation of goods and materials is a commoditized space, then the differentiation comes from how an organization manages this space. By establishing and communicating business rules to trading partners, leveraging carrier pricing agreements in a robust TMS solution and closing the loop with data aggregation and analysis, an organization positions itself for success with a comprehensive approach to controlling one of the most costly aspects of its business. When working in the commoditized space, the business with the lower cost model is positioned to win.

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Vice President – Sales TransportGistics Inc.

LOUDENBACK

The Strategic Approach to Optimizing Inbound Shipments

Q: Knowing there are significant benefits to be captured using a transportation management system (TMS) and optimizer for inbound shipping, what are some of the typical roadblocks that shippers encounter when implementing an inbound optimization strategy?

A: A very common obstacle to optimizing inbound shipping is arriving at the proper rate structure. The whole point is to find more efficient and effective routes to deliver lower costs and improve visibility into movements across the supply chain, and that almost always means modifying routes, pick-ups, etc. If an organization is only prepared to consider point-to-point (fixed) rates when making these modifications, it is going to blunt the positive effects of optimization.

The optimizer needs to consider real-life factors, not just what seems to make sense on paper. If the company determines certain inbound routes should be modified



President Ultra Logistics

beyond simple point-to-point shipments, the cost of the newly structured moves must not be calculated using point-to-point rates. Sure, carriers may oblige once or twice making these modified trips with the addition of stop charges, but ultimately, they'll call to negotiate rate-per-mile charges.

When this kind of thinking is not considered at implementation, it almost always leads to overestimating savings. Optimization must account for out-of-route miles and be configured properly to accommodate this kind of variable.

Q: How can an optimization strategy handle such variables?

A: Most optimizers are equipped to properly accommodate these variables. Frequently, users neglect to consider how these changes will impact their results, and don't configure their software tool to handle them.

Best practices dictate that shippers contact all their carriers and ask for accurate rates per mile for multiple lanes before performing an optimization. Then the system can be configured to say, "If a multi-point shipment is required, and the out-of-route miles exceed *x* percent, then the load should be calculated as a rate-per-mile shipment. Whereas if it is less than the established threshold, then it should be calculated as a point-to-point shipment with a stop charge attached."

Understanding the best way to rate each shipment is critical so carriers can accept loads without having to renegotiate rates when routes change during an optimization.

Q: What other key factors should shippers consider besides rates?

A: Understanding carrier needs regarding revenue per-day and/or per-stop to maximize equipment utilization is another critical concern. The better these needs are properly aligned with the overall network strategy, the better the results will be.

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TMS Technology for Mid-Market Shippers

Q: How have transportation management systems (TMS) evolved to serve shipper needs—and what is still missing?

A: Introduced about 30 years ago, early TMS focused on three functions: serving one mode, such as rail, truck, or air; creating solutions to determine the cost of shipments (rating); and paying freight bills. Solutions providers then moved on to develop decision-support algorithms for routing domestic freight. By 2000, the systems had expanded to cover all modes of freight all over the world. As with most enterprise application software markets, larger companies were the first to buy these products.

Today, many TMS companies focus on large, complex projects and requirements. These systems typically cost more than \$1 million and take more than one year to implement. Because of the high cost and long implementation time, top-tier systems have not fared well in the mid-market space. Some smaller companies have emerged to focus on the mid-market TMS space. None have created compelling offerings, however, and have therefore not gained much traction.

For the TMS industry's veteran players and industry analysts, it's clear a gap exists in the mid-market. New products and companies need to fill that gap, because in spite of increased purchase interest, adoption levels have remained low.



Q: What kinds of companies need a TMS?

A: If businesses simply want to ensure shipments are delivered, they can use a small number of carriers and make simplistic decisions—or outsource the whole function—and they may not need TMS technology. But if they want to reduce shipping costs, improve on-time performance, gain visibility into their shipments, or take markup, then a TMS is valuable—and sophisticated shippers use TMS data in forming business strategies.

The more shippers want to save on transport costs or differentiate themselves, the more sophisticated their TMS must be. It is about matching the complexity of their needs with the right TMS. The majority of shippers find today's TMS offerings are either not powerful enough, or just too big and expensive. So most shippers manage transportation with spreadsheets, try to build their own solution, or use a logistics service provider.

Increasingly, executives are realizing that sound transportation management makes companies more competitive. In fact, taking control of transportation can improve operating income by five to 10 percent, and boost stock prices by 10 to 20 percent, according to Accenture.

Q: What will the next generation of TMS offer?

A: They will focus on mid-market shippers and thirdparty logistics providers that use less-than-truckload and truckload extensively. These products will balance ease of use, rapid implementation, and big return on investment.

Until now, many shippers chose not to buy a TMS because of poor choices – the products were not designed by people with real domain experience, and the companies themselves were not staffed with people with quality experience in the enterprise software or transportation software markets.

But, more and more companies are seeing the value of the sound management of transportation. In fact, about 25 percent of respondents to a recent ARC Advisory survey said they are planning to buy or upgrade their TMS.

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WESELEY

CEO 3Gtms

Quantifying Transportation Performance With Technology Tools

Q: What strategic direction have shippers and carriers developed to increase partnership value?

A: Shippers and carriers have become more collaborative in their approach to pricing. For example, in the less-than-truckload market, shippers have begun to use carriers' rate base when running their bids. This creates value for shippers by using each carrier where it operates efficiently, as its rate base is naturally lower in those lanes. Because the carriers are awarded the freight they desire, shippers have a more sustainable pricing model.

Q: How do shippers leverage integrated technology and services to increase transportation performance?

A: Today, it's all about Big Data. Everywhere you look, companies are using Big Data to make decisions, whether it's hospitals trying to predict how many people will be sick this flu season, or the fashion industry mining Twitter to see how consumers are receiving the latest trend.

Many of the same concepts can be used to help shippers achieve their goals. This all starts with gathering detailed information about your transportation spend during the freight payment process, then marrying it with data from your transportation management system (TMS).

TMS data provides context that is often missing from freight payment data alone. The TMS can analyze this combined data to ensure compliance and measure success. Once these systems are all sharing information, you can run simulations against your real shipments to quantify how much the next change in your supply chain may cost, which adds one more piece of valuable data to your decision-making process.

Q: What analytics and compliance metrics are most beneficial for shippers to quantify performance?

A: Shippers should monitor two key performance indicators (KPIs). First, the Savings KPI shows the savings achieved since making the last change to their supply chain. Second, the Lost Savings KPI shows their users' compliance with the program and strategy in place.

The goal is to move as much money as possible from the Lost Savings KPI to the Savings KPI. With the detail of each shipment available through the drill-downs of these KPIs, shippers can quickly and easily see what scenarios are causing users to fail to adhere to the program.

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President RateLinx VAILLANCOURT



Managing Shipment Data to Meet Customs Requirements

Q: How are Customs agencies changing their approach to reviewing transactional data, and how will this affect shipments and traders?

A: Collaborative Border Management (CBM) between Customs agencies will allow countries to exchange trader and shipment data in a live environment so non-compliance and perceived threats can be readily identified, measured, and monitored. Customs is also expanding its IT capabilities to harmonize data standards, which allow for the creation of real-time shipment visibility.

Companies will need to know more details about their products, suppliers, and customers, and to electronically communicate this information in advance of the actual shipment. A solid technology plan will be necessary to manage trade data that has historically been either processed manually or widely ignored.

Q: As companies continue to focus heavily on future growth opportunities in emerging markets, what type of trade requirements and/or Customs challenges should they plan to encounter?

A: It is imperative to first understand transaction transparency, along with taxation and regulatory requirements. Companies should account for a measure of uncertainty in the supply chain. Shipments may be subject to changing Customs regulations, lack of a unified approach, and political backlash manifested through inspections, fines, seizures, and corruption. Supporting service contracts may be challenging if used or refurbished goods are not domestically accepted.

Q: How will increased focus on health, safety, and the environment affect the supply chain?

A: The Conflict Minerals Act, California Transparency in Supply Chain Act, Global Harmonization for Hazardous Goods, and other regulations are designed to increase transparency and visibility both upstream and downstream. To provide government and consumer assurances of product safety and social responsibility, these obligations of accountability and traceability permeate the supply chain from manufacturing and procurement through distribution and consumption.



Vice President, Global Trade Solutions Choice Logistics

Companies that want to bolster success will enlist quality business partners and develop relationships on local and national levels. Customs intermediaries and legal experts can help navigate complexities, introduce Customs to the company's business model, and act as a

Finally, maintaining an open pipeline to ensure applicable regulatory news and changes are communicated promptly will minimize negative impact.

face to the government.

Shippers must translate requirements into process execution to satisfy mandated verification, marking, testing, auditing, certification, and training without damaging the supply chain's integrity. Over the past 10 years, the regulatory realm has grown larger, more expensive, and disproportionate, leaving smaller companies to determine if verticals are still profitable, while larger companies coax their business partners to implement similar models of compliance. True costs and effects remain unknown.

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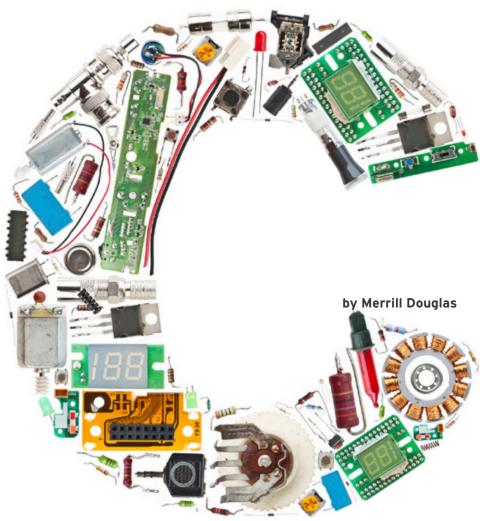
TECH TRANSPORT





Moving delicate, high-value electronics requires choosing packaging and transport modes with tender loving care.







Revenue from sales of consumer electronics will reach an estimated \$209.6 billion in 2013, according to the Consumer Electronics Association. All those smartphones, e-readers, HDTVs, and other popular consumer devices represent just a fraction of the high-tech electronics sector. The category includes just about any product that processes data, whether it's used to produce music, diagnose cancer, keep planes aloft, or perform thousands of other tasks.

Such a vast variety of products relies on an equally vast variety of supply chains. Here's how smart shippers and their partners handle the specialized needs of electronics logistics.

High-tech electronics manufacturers face one looming challenge: the growing need to manage cross-border trade.

Seventy-four percent of U.S.-based senior-level high-tech decision makers responding to a 2012 UPS-sponsored survey expect to increase exports of their companies' products during the next two years.

"The increase has been driven by changes in sourcing strategies, and demand for high-tech products among the growing middle class in emerging markets," says Alantria Harris, high-tech segment marketing manager at UPS in Atlanta. U.S.-based electronics manufacturers expect greater demand for their products in India, the Middle East, Africa, Brazil, other parts of South America, Eastern Europe, Korea, China, and elsewhere in the Asia-Pacific region, according to the report, *Change in the (Supply) Chain Survey*.

Electronics manufacturers already participate in a global marketplace. Given an even greater need to ship product internationally in the future, these companies will have to ensure they have reliable operations in each market where they source components, manufacture products, and distribute to customers.

"Businesses need to establish a presence in their current markets, and examine new markets," says Harris. "Ensuring they have the right transportation providers and suppliers can help minimize risk."

A third-party logistics provider with global capabilities—including access to transportation in many markets, connections to customs brokerage networks, and the ability to optimize transportation modes—may also help an electronics firm meet the challenges of operating in a global marketplace.

SPEED VS. COST

In addition to the challenges of operating in a global market, the speed with which newer, more-capable products push older ones out of the market also puts pressure on supply chains.

"Research and development drives the electronics business," says Jason Cook, managing director in the operations consulting group at Accenture. Electronics manufacturers focus on generating revenue by developing innovative products and getting them into customers' hands fast.

"It's a time-sensitive supply chain," he adds.

Shelf life plays a big role in shippers' transportation decisions. Mobile phone manufacturers, for example, typically keep a handset model on the market for just six to nine months. If a company transports handsets from the manufacturing site via ocean carrier, those products could spend 10 to 20 percent of their product lifecycle in transit.

"Time to market becomes a premium on those products," Cook says. "As a result, shippers tend to use more air freight."

Shipping products from Asian manufacturers to the United States often takes 30 days by ocean—about 10 times as long as the two to three days it takes by air. "But air can cost up to 10 times as much as ocean," Cook explains.

In addition to the need for speed, several other factors may prompt shippers to

choose air freight, despite the cost. One such factor is the shipment's value. When introducing a new product, a consumer electronics manufacturer might need to ship freight worth \$10 million, \$20 million, or more. That's a lot of inventory to tie up for a month.

"Products that have a large channel fill requirement tend to favor air freight because of the inventory investment that original equipment manufacturers (OEMs) and they recover their investment."

They also give customers extra value by getting the product to market faster.

On the other hand, OEMs that use postponement strategies might opt for ocean freight. These are companies that, for example, don't load software onto their products, or don't do the final assembly, until it's time to ship units to specific customers.

Because these manufacturers don't



To prevent damage, electronics equipment must be properly packaged and maintained at safe temperature and humidity ranges while in storage and during transit.

make while their product is in transit," Cook notes.

Business arrangements between OEMs and retailers often favor expedited transport as well. OEMs don't usually get paid for electronics until those products arrive in customer distribution centers. That could make air freight well worth the extra expense.

Also, the right pricing strategy can remove the sting of that cost. "If freight terms in their customer contracts allow manufacturers to cover the costs of these transportation services, they're more likely to expedite," Cook says. "They get the benefit of accelerating their revenue cycles,

need to forecast how many units with a specific configuration their customers will need, postponement makes supply chains more flexible.

Companies that ship product into a market, then hold it for final assembly or configuration, often can afford longer transit times, letting them enjoy the cost advantages of ocean transport.

"If they're not postponing—if they're putting product straight into the market—they tend to use air," says Cook.

The choices aren't always simple. Many electronics OEMs use ocean carriers, many use air, and some mix the two.

"For example, they might use air freight



to fill the channels, but bring replenishment product into the market by ocean," Cook says.

BETTER BOXES

Whatever mode companies use to ship high-tech electronics, they must make sure delicate products arrive intact. That makes handling and packaging important concerns.

One company that has given much thought to packaging in recent months is Cox Communications, the third-largest provider of cable and broadband services in the United States. A quest for packaging to better protect its products in transit was a major component of a recent 18-month supply chain transformation initiative, says Ian Burgar, director of customer premise equipment (CPE) operations at the Atlanta-based company.

The term CPE refers to set-top boxes, cable modems, gateways, and other products cable companies provide to end users, plus business-oriented equipment such as phone systems. Some equipment customers receive is new, but much of it is

returned by other customers when they no longer need it, then refurnished by the cable company. This "churn inventory" gives cable company supply chains a large reverse logistics component.

Cox buys its products from major OEMs such as Cisco, Motorola, and Arris. New equipment and product returned by customers flow into four regional distribution hubs in Chesapeake, Va.; Baton Rouge; Wichita; and Phoenix.

Employees in the DCs test and refurbish the used equipment, repackage it, and distribute much of it to primary distribution centers (PDCs) in the markets that Cox serves. The company operates a private fleet to move those units. It also uses package carriers to ship units directly to customers who do their own installations, rather than rely on the company's service technicians.

Before the transformation initiative, Cox had no packaging standards for product shipped into or out of the PDCs, either in bulk or via package carrier. Cox collaborated with the International Safe Transit Association (ISTA), a standards organization that works on packaging for transportation. "We designed bulk and direct consumer packaging to pass ISTA specifications," Burgar says.

BULKING UP

For bulk transportation, Cox developed a carton that holds four units of any product. "Foam padding lines the bottom of the boxes," explains Burgar. "Each divider has foam padding to lock the units in place, so they don't bounce around in transit." The company also bags each product to prevent cosmetic damage.

For direct-to-customer shipments, Cox developed a single-unit carton, which it held to even higher ISTA standards than the bulk carton. Testers at an ISTA certification lab dropped loaded cartons from different angles, compressed them, subjected them to high humidity, and put them on a shaker table to simulate the vibration cargo may experience during a long truck ride.

Since implementing the new packaging, Cox spends less money on cosmetic touchups and certain repairs.

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RELOCATION LOGISTICS: HANDLE WITH CARE

hile high-tech electronics manufacturers and vendors tailor logistics strategies to meet the needs of delicate and high-value products, customers that buy those products might need detailed logistics plans of their own. Moving the contents of a data center to a new location, for example, requires a great deal of planning, and specialized knowledge and equipment.

Companies that perform these moves must know how to uninstall equipment at the origin, pack it properly, and secure it in the vehicle - then reverse the process at the other end. They must have well-trained drivers, and operate the right kind of vehicles for the climate.

"In a very humid environment, you need a climate-controlled vehicle, with air conditioning or a humidifier," says Bruce Cardos, principal consultant in the data center relocation practice at Data Link, Eden Prairie, Minn. Equipment moving from a hot location to a cold, wet one needs climate control as well. The key is to keep condensation from forming on equipment during the move.

Because companies rely on data centers for crucial functions such as payroll, time windows for relocations tend to be narrow. When the window is especially small, the equipment might travel by plane.

To move data centers for its clients, Data Link works with Hi-Tech Transportation Inc. of Charlotte, N.C., a carrier that specializes in electronics and medical imaging equipment. Companies moving high-tech electronics often create problems when they fail to develop a complete inventory of their equipment.







Working with a specialized carrier such as Hi-Tech Transportation can help ensure problem-free data center moves.

"They may pay to move outdated devices, or equipment scheduled for decommissioning," says Samuel Lolla, managing partner at Hi-Tech Transportation. "Properly identifying those devices during the inventory process is key to the future relocation design plan."

Along with good planning, a data center move requires experienced personnel and appropriate vehicles. "Vehicle breakdowns can cause huge delays, as well as unplanned, extended network outages, which ultimately cause operational problems and, in many situations, lost revenue," Lolla says.

Although specialized carriers for high-tech loads tend to be more expensive than common carriers, they also offer significant savings by averting damage. Using a carrier with equipment that offers a gentler ride can also save the shipper money on specialized crating or packaging.

"Companies realize financial gains when aftermarket packaging or crating does not need to be manufactured, or purchased and shipped," notes Lolla. Shippers also save on labor, because they don't need to repack their equipment before shipping. All these precautions add up to a smooth move.

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For the future, Burgar hopes to persuade OEMs to change their own packaging practices. Today, OEMs box and palletize their products for shipment from overseas manufacturing sites to the United States; then Cox repacks the units into smaller cartons for delivery to individual markets. Cox would like its vendors to use smaller cases that can flow through the supply chain.

Burgar also would like to replace much of the company's cardboard packaging with plastic corrugate—a greener and more cost-effective material than cardboard—because shippers can re-use it for years.

QUEST FOR PERFECTION

Packaging is also an important issue in business-to-business (B2B) high-tech electronics sales. Many businesses insist that packaging arrive in perfect condition.

"If they see damage to the packaging, they believe there's possible damage to the product," says Danny Stephens, global vice president of transportation at Phoenixbased Avnet. Some refuse product on that basis, without even taking it out of the box.

With a presence in more than 70 countries, Avnet sells electronic components to OEMs, and integrated computer systems to resellers and end users. It operates two major DCs in Chandler, Ariz.—one for each product line—plus several smaller U.S. facilities.

While Avnet experiences few problems with damage in transit, greater customer focus on packaging is making the company strive even harder for perfection. "We keep carrier performance metrics, and work with our carriers and engineering team on packaging," Stephens says.

Protecting product while controlling packaging costs is a continual balancing act. So is mode selection.

For companies such as Avnet that sell components to companies that favor just-in-time manufacturing, choosing a mode for international transportation is easy. "Ninety-nine percent of our international freight comes by air," Stephens says.

But for domestic transportation, the company keeps costs down by moving about 85 percent of its shipments by truck. Exceptions occur when product arrives late from one of Avnet's suppliers, or when lack of components threatens to shut an OEM's production line.



"We are a customer-driven team, so if a customer has an immediate need, the shipment moves by air," Stephens says.

HIGH-VALUE HANDLING

The high value of many products Avnet ships, combined with its frequent use of parcel carriers, creates another challenge: moving these valuable products.

"We have no easy, cost-effective way to insure that type of product because of the volumes we ship," Stephens explains.

The carriers that handle Avnet's bulk shipments offer liability coverage more suited to the company's needs. Luckily, Avnet rarely sees product go astray, no matter whose truck it's on.

For its bulk shipments, Avnet has cultivated relationships with carriers whose standard operating procedures align well with its own requirements.

"We ensure they're all certified by the Customs-Trade Partnership Against Terrorism (C-TPAT), and that they have secured facilities wherever they move our product," Stephens says. "We verify that they have handling procedures to support moving either electronic components or integrated computer systems."

LG Electronics—a Korea-based vendor of consumer electronics, mobile communications products, and appliances—also works with carriers to ensure that its products stay safe and secure.

"Trailer theft continues to rise in the United States, so in 2011, LG began taking steps to reduce its transit losses through a layered security approach with its service providers," says Michael Fahey, director of transportation and security C-TPAT at LG Electronics U.S.A. in Englewood Cliffs, N.J.

"We have worked over the years on detailed processes for trailer entry at our DCs, and we've created more stringent guidelines for vetting carriers," he says.

LG scans the licenses of all drivers who serve its DCs. "We also require each trailer and driver to provide a valid commercial driver's license and load number, or the driver will be turned away," Fahey notes.

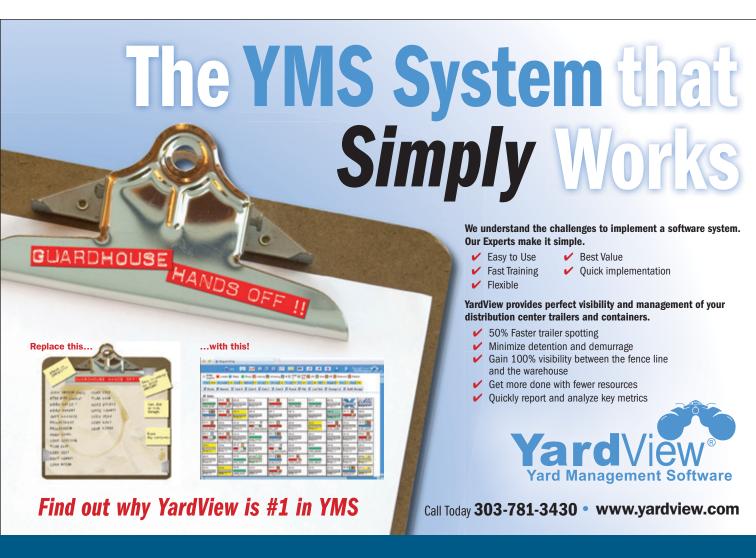
The varied needs of retailers that receive

electronics from LG also pose shipping challenges. "All customers require different stack heights, pallets, floor loading, and number of labels," Fahey says. "This can be labor-intensive for the DC, because the shipment must be compliant, yet it must utilize the space within each trailer."

Complying with the guidelines established by large retailers such as Walmart, Target, and Best Buy is simply business as usual, and LG has always succeeded in this area. "But now even regional retailers have compliance guidelines we must follow," Fahey says.

To meet this growing demand, LG creates a checklist of customer requirements for each order. The company measures its performance monthly to ensure it is meeting customer requirements while also maintaining its own cost objectives.

As information technology takes over more aspects of our lives, the electronics sector will only continue to grow. The special savvy and TLC it takes to ship these products safely and efficiently will become more important than ever.







FRILA:

Abundant natural resources, a growing labor force, and proximity to consumer markets in Europe and Asia make Africa an attractive target for foreign exploration—despite social unrest and a need for more government collaboration and logistics infrastructure investment. By Joseph O'Reilly

IN MANY WAYS, AFRICA'S POTENTIAL AS A MANUFACTURING AND LOGISTICS hotspot mirrors the continent's greatest allure: an abundance of raw, natural riches such as gold, diamonds, precious metals, timber, oil, coffee, cotton, and cocoa that has paved the way for investment from companies and countries looking to tap these valuable commodities.

Over the past few years, the United States, France, and China have jockeyed for position as the continent's most aggressive suitor. China's motive is clear: Africa's energy and agriculture affluence is a great source for fueling and feeding a growing middle class. And now a new player has entered the game: Malaysia. The Southeast Asian country has trumped China in the size of its foreign direct investment into Africa, according to recent United Nations data.

DJIBOUTI

uthorities are hoping current and future government investment in Djibouti's port complexes attracts global private investors. Located on the Horn of Africa at a critical gateway between the Gulf of Aden and the Red Sea, Djibouti's economy is heavily reliant on import, export, and re-import trade with Ethiopia—Africa's second most populous nation and one of the fastest growing economies in the world.

In 2011, DP World, the third-largest global port operator, announced plans to triple the size of Djibouti's existing port. The \$396-million expansion will increase Doraleh Container Terminal's container capacity from 800,000 TEUs to 1.7 million TEUs during the first phase, and to three million TEUs in the second phase. Plans are also in the works to develop a free trade zone to further boost port traffic.

Still, much of this outlay has been exploitative rather than constructive. The Democratic Republic of Congo's struggle with conflict minerals serves as a microcosm for similar abuses elsewhere on the continent. Socio-political instability, civil war, disease, corruption, piracy, and nepotism have all impeded economic development. Yet the continent is brimming with potential—far beyond the mines, manufacturing plants, and crop fields that incent foreign exploration.

As Asia's low-cost manufacturing edge continues to dull, companies are naturally looking for the next hot labor market. South Africa has joined Brazil, Russia, India, and China (known collectively as the BRICS nations) as an emerging economic mover and shaker. But the country is really a proxy for the continent at large.



The Nelson Mandela Bridge crosses the Johannesburg Station railyards. Insufficient transportation infrastructure outside Africa's major cities poses a major supply chain obstacle.

The Lay of the Land

Geographically, Africa is a global crossroads. At the nexus of its northern Mediterranean shoreline and Eastern Red Sea coast is the Suez Canal—the busiest shipping corridor in the world. It's proximate to Europe and the Middle East, and a direct line to Asia and the Americas via its eastern and western seaboards, respectively.

But Africa is also a place of extremes. A number of the continent's best-performing economies—South Africa, Algeria, Morocco, and Egypt—are located at its poles. Following the 2012 Arab Spring uprisings, North Africa devolved into a sociopolitical tinderbox. On the other end, South Africa still struggles with the legacy of Apartheid. In between, poverty, corruption, and violence continue to thwart progress.

What African countries possess in natural wealth, they lack in other areas, notably transportation infrastructure. The continent lays claim to the most unique countries in the world—the total number of which seems to change with every new civil war. As a consequence, Africa suffers from a lack of centralized

DURBAN, SOUTH AFRICA

he Port of Durban, located on South Africa's eastern bend, is the largest container hub on the continent. Durban, the country's third-largest city, is a bustling center of commerce, increasingly defined by its domestic industries.

The past two decades have seen a marked uptick in the gross valueadded contribution of the financial and manufacturing sectors, according to a recent economic development report by eThekwini, the metropolitan municipality within which Durban resides. Other industries such as mining, agriculture, and construction have either remained static or declined.

Consequently, the transportation, storage, and communications sector experienced the highest overall growth in the past 15 years (5.3 percent), with the financial and business sector following closely behind (5.2 percent), according to the report.

The focal point for Durban's economic growth remains the port, and

capacity is expected to almost double to five million TEUs over the next decade. The South African government has pledged \$33 billion toward further infrastructure development throughout Transnet, the country's rail, port, and pipeline company—\$2 billion of which will be specifically earmarked for the port. This outlay does not include other capital that has been directed toward its sister company Transnet Port Terminals.





transportation infrastructure linking more developed coastal cities with hinterland areas.

Because of its dependence on mined or harvested commodities—as opposed to services or domestic industries—reducing freight costs and transit times are critical success factors. But aside from South Africa and the Suez Canal in Egypt, Africa lacks major global ocean or air transport hubs. A fractured network of small, regional ports has catalyzed dysfunction and constrained development.

Beyond the ports, Africa's overland infrastructure is equally limited. Sub-Saharan Africa accounts for only three percent of the rail transport of developing countries, but has 17 percent of the population and seven percent of the GDP, according to a study by the Organization for Economic Co-operation and Development, an international world trade advocacy.

Less than one-fifth of Africa's road network is paved, compared to more than one quarter in Latin America and more than two-fifths in South Asia. While the International Monetary Fund projected a 5.3-percent economic growth rate for sub-Saharan Africa in 2013, trade barriers between countries, and a lack of transport integration, continue to impede improvement.

Coastal Developments

But signs of progress are arising—and much of this optimism centers on Africa's maritime trade. DP World, the third-largest international port operator, is making significant investments. Major new developments include the Doraleh Container Terminal in Djibouti and management of two terminals in Algeria, at Algiers and Djen Djen. The company also has stakes in Mozambique and Senegal.

More recently, a consortium comprised of APM Terminals, Bollore Africa Logistics, and French industrial group Bouygues placed a bid to manage a second container terminal at the Port of Abidjan, Ivory Coast. APM Terminals is the largest port operator in West Africa, with nine existing facilities in the Ivory Coast, Liberia, Benin, Nigeria, Cameroon, the Republic of the Congo, and Angola. Plans for the new terminal include an injection of \$590 million over a 21-year concession term. By accommodating larger containerships, the consortium hopes to transform Abidjan into a regional hub for West Africa.

Similar developments are underway elsewhere on the continent. China is looking to finance what could be a \$10-billion

BAGAMOYO. TANZANIA

hina's insatiable appetite for infrastructure investment at home and abroad led the country to help finance the construction of a new port at Bagamoyo in Tanzania. The project aims to decrease congestion at the nearby port of Dar es Salaam, where lack of space limits expansion.

In March 2013, Tanzanian President Jakaya Kikwete and Chinese President Xi Jinping signed 16 agreements for development projects on mainland Tanzania, and three agreements for Zanzibar. The deals clear the way for China to finance and build a \$10-billion port at Bagamoyo, as well as other infrastructure projects.

China's play in Tanzania is incentivized by the presence of abundant mineral resources in the region, including iron ore, gas, oil, and coal. A port at Bagamoyo would facilitate China-bound shipments of minerals from Zambia, Zimbabwe, and the Democratic Republic of Congo via the Indian Ocean. Currently, shipments need to be routed through the Kenyan port of Mombasa and the South African port of Durban—both of which are circuitous and costly options. The Tanzanian government hopes the new port will become an East African trade hub for Indian Ocean shipments, and help expose other landlocked countries in the area.

China has committed to a \$500-million installment in 2013 to initiate the port project, which is scheduled for completion by 2017 and is expected to expand Dar es Salaam's capacity from 800,000 TEUs to 20 million TEUs. Whether that is a realistic goal remains to be seen, but all eyes will be on Bagamoyo for the foreseeable future.

port complex in Bagamoyo, Tanzania; Morocco plans to set up 70 logistics hubs in Marrakesh, Casablanca, Tangier, Rabat, and Fes by 2020; and South Africa is investing in its bulk port at Richards Bay and container operations in Durban.

Moving Inland

The next phase in Africa's transportation transformation will likely focus on efforts to grow hinterland connectivity. Developing these types of connections is crucial, noted Reik Mueller, port and terminal facilities firm APM Terminals' director of business development and infrastructure investments for the Africa-Middle East Region, speaking at the 2012 Africa Ports, Logistics, and Supply Chain Conference in Accra, Ghana.

Nearly one in three African countries is landlocked, he noted. This area accounts for 26 percent of the continent's landmass, and 25 percent of the population—or more than 200 million people. Africa's rising star as a potential manufacturing and trade destination depends on connecting these untapped markets.

In fact, the continent has the fastest-expanding labor force in the world, with more than 500 million people of working age. That number is expected to pass one billion—matching China and India—by 2040.

APM Terminals is facilitating transshipment between ports and interior destinations by establishing inland container depots outside terminals in Luanda, Angola, Ghana, and Nigeria. The key is making these ports and their extended supply chain ecosystems more competitive, thereby increasing service and reducing costs.

Taking to the Skies

Demand for modal connectivity also extends to air freight, which shows similar signs of advancement. African carriers saw year-over-year airfreight demand rise by two percent, according to the International Air Transport Association (IATA). This growth is underpinned by expanding national economies, according to IATA. It also reflects Europe's growing market for fruit and flowers—and Chinese demand for everything.

But a more important indicator is the growth in passenger demand. Intra-African premium (first and business class) air traffic grew by 14.7 percent in 2012, while economy class traffic increased 11.5 percent—compared with global international air traffic growth of 4.8 percent and 5.9 percent, respectively.

IATA reports that premium travel markets were driven largely by demand for business travel – good news for African economic growth in general.

Still, eight of Africa's top 10 airports are located in South Africa, Morocco, or Egypt—a reflection of their appeal as tourism destinations. As with most developing countries, airfreight demand and infrastructure will inevitably follow the consumption curve.

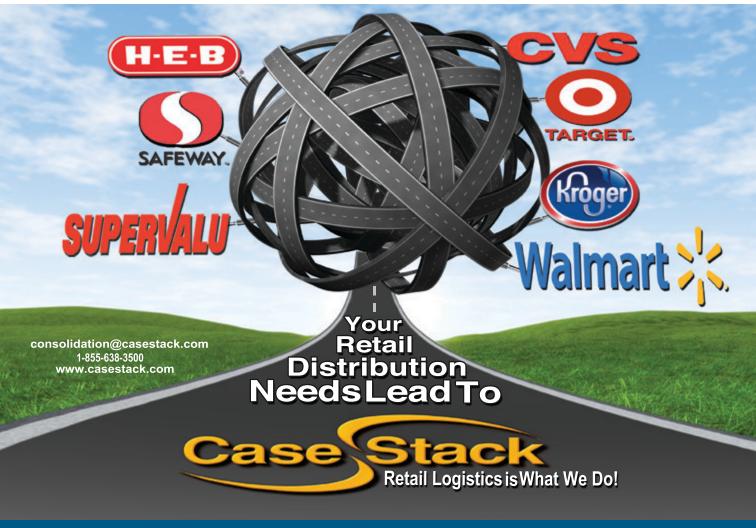
Across the Great IT Divide

Africa's information technology progression lags well behind the curve of other developing countries. With several exceptions, the majority of African nations fall outside the Top 100 in network readiness, according to the World Economic Forum's 2013 *Global Information Technology Report.*

Internet penetration in Central Africa is nebulous at best, which is an impediment to development. But that is likely to change at broadband speed.

In some regards, developing countries have an advantage over adequately sophisticated and hard-wired areas. Fewer barriers to entry enable new, wireless communication capabilities to populate—and the return and impact of investment is far faster. Companies such as IBM, Google, Microsoft, Apple, and French mobile operator Orange see Africa as the next great frontier to grow IT and communications connectivity, and their respective businesses.

As more global companies expand operations into Africa, they will find ways to cope with the market's challenges—and ways to overcome those obstacles as the continent's economic growth progresses.







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- World Trade Week highlights the importance and benefits of and promotes global trade in Southern California through more than 40 events held throughout the month of May. The 87th Annual Kickoff Breakfast is Thursday, May 2 in Los Angeles. Visit worldtradeweek.com.
- ▶ **Global Initiatives Council** works to create employment opportunities throughout Southern California by increasing exports, imports and foreign investment for companies of all sizes, and for the communities in which they conduct business.
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MOBILE COMMUNICATION:

CONNECTING SUPPLY CHAINS ON THE GO

Mobile communication tools deliver shipment visibility, worker performance, and asset-tracking data directly to managers, no matter where they are.



By Marty Weil

s transportation and logistics managers seek new ways to compete in challenging markets, many are implementing mobile technologies to optimize their supply chain. It shouldn't be surprising: the ability to monitor operations in real time provides the visibility to fine-tune them—from warehouse to dock to transportation, and eventually to customers.

"Mobile technologies allow retailers and shippers to push interaction closer to customers," says Mike Giguere, principal, supply chain and operations, at New York, N.Y.-based consulting firm PwC. "Getting closer to customers provides a huge advantage in understanding the market." Mobile solutions offer two more advantages:

- 1. Interactivity. Companies using mobile solutions are not just pushing information out, but allowing collaboration across the supply chain. This connectivity generates significant efficiencies and maximizes asset utilization.
- 2. Data capture and analytics. "Being able to leverage the data gathered by mobile solutions for analytics allows ongoing operational optimization," says Giguere. "For example, shippers who have implemented mobile computing devices can manage operations remotely, and assess the impact of daily activities. They can use analytics to optimize route management, fuel efficiency, and time per stop. The technology gives them a strategic advantage."

MOBILE SOLUTIONS: 4 STEPS TO A FLEXIBLE SUPPLY CHAIN

Today's supply chains are challenged to "develop agility in an uncertain world," according to 10 Minutes on Supply Chain Flexibility, a report by consulting firm PwC. Mobile technologies can help support this goal in four ways:

INTEGRATING THE SUPPLY CHAIN WITH OTHER BUSINESS FUNCTIONS. Companies that acknowledge the supply chain as a strategic asset achieve 70 percent higher performance. Taking steps to connect supply chain operations to functions such as marketing and sales can help strengthen the entire business.

FACILITATING SUPPLIER PARTNERSHIPS AND COLLABORATION. Potential supply chain disruptions make it more critical than ever for companies to share data and strengthen relationships with key suppliers.

ENABLING COMPANIES TO ADJUST QUICKLY TO CHANGES. The better the information companies have at hand, the more responsive their supply chains can be. Without mobile devices, supply chain information can be slow to reach managers.

MEASURING AND MANAGING SUPPLY CHAIN DATA.
Companies can use mobile tools to collect supply chain data that informs strategic decisions.

Mobile computing provides other significant analytical benefits. "Mobile tools are ideal for collecting important data points from the field, such as different warehouse or manufacturing facilities," notes Irad Carmi, founder and chief technology officer at TOA Technologies, a Beachwood, Ohio-based mobile workforce management solutions provider. "Companies can use this data to forecast and predict activities and their potential impact on the supply chain."

Mobile solutions are at work in every part of the supply chain. They are a key part of many warehouse environments, especially in directed picking applications. In transportation, mobile technology has been particularly significant for expedited parcel carriers that use it to improve customer service and continually optimize operations. Private fleets and motor carriers also use mobile devices for tracking shipments and collecting driver performance data.

Impacting Today's Supply Chains

Better, faster communication enabled by mobile computing has improved operations for Carlton & United Breweries, the Southbank, Australia, maker of Foster's Lager. The company relies on a mobile enterprise application and app development platform tool from Houston-based Retriever Communications to leverage mobile devices such as smartphones and tablets to improve workflow, and enable data transfer between the home office and field workers.

"These tools have helped us with realtime delivery information," says Garry Smith, program manager, supply, at Carlton & United Breweries. "Our mobile solutions tell us exactly where our trucks are in transit, and whether we need to make any adjustments. Implementing mobile computing gives us flexibility to manage and optimize throughout the day."

Mobile solutions are also effective across all operations at Goya Foods, a food company based in Secaucus, N.J. "Outside the distribution center, mobile computing gives us the opportunity to visit customers, then record and transmit orders wirelessly through the available cell phone network to our host system for processing," notes Luis Ramos, Goya's general manager.

This process is much more efficient than non-mobile methods, which at one point involved a Goya salesperson taking orders on paper, then phoning a call center operator to enter them into the system. Now, as long as there is network access, the salesperson can transmit the order.

Field and Data Stream

With these mobile tools in the field, Goya has achieved greater efficiency through increased visibility and connectivity. The company is also leveraging mobile technologies within its facilities. "We're employing mobile data collection devices to gain inventory visibility," Ramos says. "We're able to use these devices on our local network to assist with putaway, picking, and order verification."

Using Avalanche, a mobile device management system from South Jordan, Utah-based technology provider Wavelink, Goya manages 250 wireless devices at 14 warehouse locations. The solution allows Goya to deploy new applications on a regular schedule or on the fly, without requiring an IT worker to travel to the various sites.

At Goya, pickers carry handheld devices and wear headsets, enabling both bar-code scanning and voice-directed picking. Because Goya runs day and night shifts, it wanted devices that were not tied to individual pickers' voices. Wavelink's *Speakeasy* mobile emulation-based voice application provides this capability.

When workers arrive for their shifts, they can pick up any device, select either English or Spanish, then use a calibration wizard feature to help the device understand them. Within minutes, they are ready to begin pulling items from inventory. They scan the task ticket, then a voice directs them where to go and confirms each step and item quantity.

Keeping Goods Moving

Mobile solutions are becoming the tool-of-choice for supply chain optimization. "We use handheld computers to process goods received, put away, moved, picked, and shipped," says Steve Cain, IT manager at London, Ontario-based Chalifour Canada, a hardware and building supply distributor. "Forty percent of our sales transactions are also scanned and entered into a mobile computer; with these types

of orders, virtually every step—from when an order is accepted to when it ships—is performed on a mobile computer. For optimum speed and accuracy, these devices are critical to our operation."

A Perfect Pairing

Chalifour recently implemented a full warehouse management system that tracks all warehouse materials. After engaging with Mukilteo, Wash.-based PathGuide Technologies to implement the WMS, Chalifour paired the solution with mobile computers and printers, increasing productivity by an average of 10 percent almost instantly.

Carlton & United currently uses mobile solutions only for its delivery fleet, but plans to adopt them in all departments.

"The most effective way we've leveraged the power of mobile is having native applications that can work across different devices and operating systems," says Smith. This makes it easy to ensure that no matter what devices truck drivers are using, the apps and platform are compatible.

"Investing in quality, industrial-grade



Mobile devices aid warehouse workers in tasks such as picking and putaway, while collecting valuable inventory data.

mobile devices helps ensure they will be reliable when combined with software applications," advises Cain. "Providing process training and ownership to the employees who use the tools creates a productive environment."

From a high-level perspective, mobile solutions make it easier to know what

everyone in the organization is doing. "These tools offer instant access to information no matter where you are," says Smith. "Mobile computing helps drivers organize checklists, delivery schedules, and inspections."

A further benefit of using mobile solutions shows up in productivity. Chalifour's mobile workforce management system features built-in metrics that allow employees to view each team's daily performance by employee. This transparency creates accountability. Workers compete to reach the top of the list, and the rankings put peer pressure on employees who are not pulling their weight.

Into the Future

Mobile technology continues to evolve, and will have far-reaching effects across the supply chain. "Wearable mobile devices will help track activities throughout all logistics operations," notes Giguere.

For companies tracking multiple assets, shipments, or workers, mobile technologies represent a leap forward in visibility and communication.

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Logistics at the Global Crossroads

Shipments moving to, from, and through Alaska connect the state's businesses and residents to the rest of the world.



f more people owned globes than flat maps, Alaska might be an even busier hub for global commerce than it is now. The shortest flight path between the United States and Asia stretches over Alaska, and Asia-bound steamships typically pass near Alaska's Aleutian Islands. Airfreight shipments from Anchorage can reach 90 percent of the industrialized world within 9.5 hours. And Anchorage International Airport has a special exception from U.S. trade laws that allows foreign airlines to transfer cargo between planes on the tarmac.

But perhaps because flat maps isolate Alaska way up at the top, many people think of the state as located well outside normal trade routes — so the 49th state retains a lot of untapped potential.

"Alaska is a unique place for logistics," says Dr. Darren Prokop, professor and chair of the Department of Logistics at the University of Alaska-Anchorage. "It's both a frontier and a global crossroads."

Specialized Services for a Unique Environment

Alaska distinguishes itself from the lower 48 states by its abundance of natural resources—crude oil, natural gas, seafood—as well as breathtaking mountain ranges and vast acres of unspoiled land.

It also presents challenges: a small but widely dispersed population, many in locales reachable only by water or air; highly rugged terrain in much of the state; extreme weather; and limited rail and road infrastructure.



Only 31 percent of Alaska's roads are paved. Central Alaska is where the roads are, but they don't reach southeast Alaska – which typically requires barge transport – or rural Alaska, where barge can reach the outskirts, but air is required everywhere else.

Aware of All the Options

Those challenges require a special breed of logistics provider to successfully move cargo within, into, and out of the state. They must offer multiple transportation modes to reach all destinations. Alaska's logistics providers must possess both the heavy equipment and know-how to move giant oil-drilling equipment to the northernmost reaches of Prudhoe Bay, and refrigerated transport to handle sensitive nursery plants, produce, and other temperature-controlled items.

"Logistics providers must be aware of all the options to get product into and around the state — from steamship to barge, highway, and air," says Paul Grimaldi, president of Lynden Transport, the trucking arm of the Lynden Incorporated family of transportation and logistics companies. "They all come into play when you serve the whole state."

Alaska's logistics providers must also be prepared to handle shipments differently than other U.S. providers. In Alaska, cargo such as building supplies, produce, and food products that would be trucked in other locations often requires air or barge transport—which, because of the weather, is only an option part of the year in some areas.

In addition, logistics in Alaska requires extra equipment, which must often be specialized for rugged conditions or specific needs, such as hauling oil-drilling equipment. Lynden, for example, operates flatbeds and stretch decks, and moves modules for oil rigs, pipes, and raw materials such as mud.

"It's very capital-intensive to serve Alaska, requiring carriers to offer more equipment than traditional carriers from the lower 48 who only move from Point A to Point B," says Grimaldi.

"We could have one trailer on a ship, and others in Anchorage and Seattle—all

to service one company," he continues. "We've got to keep the supply chain moving."

Shippers outside the state may not fully grasp the magnitude of the challenges. Alaskan logistics providers often field questions from puzzled non-natives wondering whether they need a passport to visit Alaska from the lower 48 states, or whether carriers offer express over-the-road service from Seattle to Anchorage — which may look short on the map, but is a 2,358-mile journey.

with steep grades, and not always paved. These conditions mean "you have to package shipments well if they're going to remote areas," says Linda Leary, president of Carlile Transportation Systems.

Magnifying the Trends

All these challenges make Alaska a costly place to move cargo, so it's even more important that service providers help shippers optimize their loads and networks.

Lynden Transport, for example, offers dynamic routing so "shippers pay for the



Cargo carriers in Alaska often employ multiple transport modes to accomplish deliveries. Lynden Transport, for example, moves cargo via barge, truck, and air, and operates specialized equipment as needed.

To help shippers better understand the state's supply chain nuances, Carlile Transportation Systems, one of Alaska's largest trucking companies, introduced Carlile University four years ago to provide courses covering transportation in Alaska, as well as general logistics topics.

Supporting shippers doing business in Alaska also means counseling them on how to ensure safe transport of their goods. One Carlile customer was surprised to learn that interstate highways in Alaska are not required to be constructed to interstate highway standards that apply in the continental United States.

Many Alaskan highways are rural, twolane, undivided thoroughfares – sometimes speed they need," says Grimaldi. As an asset-based carrier, the company operates multiple modes to get shipments where they need to go when they need to get there.

"We work with shippers to meet their transportation needs as best we can — and if we see an opportunity to make their transportation dollar go further without compromising efficiency, we'll do so," says Grimaldi.

These innovations include seeking ways to minimize handling, avoid damages, and improve delivery to customers.

Every shipper wants more visibility of shipments in transit, especially for perishable cargo such as seafood. Lynden uses



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onboard computers in its trucks to provide this visibility. "We landmark every shipper with a latitude and longitude," says Grimaldi. "Our route optimization software uses GPS locations to optimize routes, and allows shippers to track shipments in transit."

Rising to the Challenge

Shipment visibility hasn't always been this easy. When global positioning systems came into vogue, the networks' satellites couldn't reach some Alaska locations due to the curvature of the earth; special satellites were launched just to cover the state's northern reaches. Today, the state is similarly challenged in cellular coverage.

Driver issues also impact Alaska in unique ways. In addition to a population of fewer than one million from which to recruit drivers, increasing Hours of Service restrictions have particular implications for the state. When there is no civilization or creature comforts along a 500-mile stretch of road, it can be difficult—and even dangerous—for drivers to stop for a mandated rest period.

Extreme weather can also create challenges in Alaska, particularly on its north slope. But the state takes pride

in its flexibility and determination to find solutions.

One shining example is the Juneau Airport Wind System (JAWS), an air turbulence system that alerts pilots about severe wind conditions at and around Juneau International Airport.

A heavily used approach takes aircraft through the 15-mile-long Gastineau Channel, which is flanked on both sides by mountain ranges that create moderate to severe turbulence. After several close calls, the Federal Aviation Administration (FAA) suspended certain flight paths, and some carriers stopped serving Juneau due to multiple cancelled flights.

Alaska Airlines—a subsidiary of Alaska Air Group, which serves Alaska, the continental United States, Hawaii, Canada, and Mexico—worked with the National Center for Atmospheric Research and the FAA for 18 years to develop JAWS. It was formally commissioned in July 2012, but data from JAWS has already enabled Alaska Airlines to operate at the airport for more than a decade with a flawless safety record, says Joe Samudovsky, director of cargo sales and marketing at Alaska Airlines' cargo arm, Alaska Air Cargo.

The JAWS equipment provides wind

shear and turbulence data that can be analyzed to provide a go or no-go recommendation to pilots arriving and departing Juneau. The FAA is now considering the system for other airports.

Conquering the Weather

For 13 days in January 2013, heavy fog grounded a significant number of planes in Seattle, but Alaska Airlines' pioneering use of autoland — a system that fully automates the landing phase of an aircraft's flight — with a Head-Up Guidance System enabled the carrier to continue its schedule. Such innovations helped Alaska Airlines earn Flightstats.com's designation for the past three years as the most on-time airline among North America's major airlines.

That reliability is critical to Alaska Air Cargo customers such as Lynden International. "When we sell a priority service, that often means overnight—or sometimes sooner," says Dennis Mitchell, vice president of oil and gas for Lynden International.

"If a drilling rig is down, it can't pump oil, and that costs tens of thousands of

Alaska Air Cargo provides shipment visibility and temperature-controlled transport for the state's seafood industry.



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"Logistics providers must be aware of all the options to get product into and around the state—from steamship to barge, highway, and air."

- Paul Grimaldi, President, Lynden Transport

dollars a day, so we rely on a carrier partner that is going to perform," he notes.

Alaska Air Cargo's problem-solving capability was tested recently when an oil rig went out of commission in Prudhoe Bay and needed a small – but vital – part to pump oil. The part's flight out of Houston was delayed by weather, which meant it would miss its connection to Alaska Air Cargo in Seattle by 20 minutes. But the carrier held the flight, and the part was transferred on the tarmac from one plane to the other.

"That experience reflects the working relationship Lynden has with Alaska Air Cargo," says Mitchell. "We deal with a lot of airlines all over the United States, and our relationship with Alaska Air Cargo is among the strongest. They've performed for us, and we have grown together."

Supporting Specialized Industries

Alaska's logistics providers must also be equipped to ship its rich, in-demand raw materials. One of Alaska's best-known exports is seafood. In addition to such mainstays as salmon and halibut, the state has recently seen greater interest in some of its lesser-known seafood. For example, China's growing middle class prizes Alaska's geoduck, considered the prime rib of clams—though its appearance and large size seem to turn off American palates.

Alaska Air Cargo is a vital link in connecting Alaska's fresh seafood to markets throughout North America and the rest of the world. Customers are particularly interested in tracking those shipments to ensure safe passage.

"Many seafood customers use temperature-controlled devices to ensure seafood shipments' freshness through the supply chain," says Samudovsky. "That is why Alaska Air Cargo partnered with the Alaska Seafood Marketing Institute and one of its seafood customers to develop a cold chain training program that all cargo employees are required to participate in. The program helps increase awareness for the safe and efficient handling of perishable seafood."

Alaska is also well known for its crude oil, natural gas, and mining resources. Supporting these industries requires maintaining specialized equipment needed to accommodate high, wide, and heavy loads.

Sometimes it also means helping transport people. Alaska Airlines, for example, flies oil field workers to Prudhoe Bay while the spare parts for their next job are in the cargo hold on the same flight.

With a relatively small retail market, Alaskans have become big fans of e-commerce. But because not all e-commerce companies ship to Alaska, logistics

providers have stepped in to help. As one example, Carlile recently introduced Package Express, a small package service through which consumers provide a Tacoma, Wash., address and Carlile handles transportation to Alaska.

Global Commerce

Alaska's logistics infrastructure is well-tuned for moving raw materials out of the state for processing, bringing needed supplies in, and transporting people and goods across the state's vast 663,000 square miles of diverse terrain. But it's also prepared to handle more—if others recognized the state's potential.

"There aren't many value-added manufacturers in Alaska," explains Prokop. Even the crude oil is trucked south, refined, then brought back as gasoline.

"Manufacturers could leverage Anchorage," Prokop continues. Despite perceptions that the city is remote, its 9.5-hour flight time to most of the industrialized world makes the area better positioned than some people think.





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Increased manufacturing could also help address Alaska's backhaul issues, because more freight volume goes out than comes in.

The state's role in global commerce is expected to get a boost with the eventual opening of the Northwest Passage. As the polar ice cap recedes, the northern shipping route is expected to become navigable year-round. "Why use the Panama Canal or go around the Cape of South Africa when you can go through the Northwest Passage to Europe?" asks Prokop.

That development could mean considerable investment in infrastructure — such as ports and a road system — along Alaska's northern shores. In the meantime, logistics providers in the state continue to embrace the challenges of conquering immense, diverse terrain, and the vagaries of the weather, to keep vital goods moving into, out of, and within the state.

"We love the adventure of trying to figure out how to make a delivery happen," says Carlile's Leary. The company's drivers'



exploits have been featured on the History Channel's program *Ice Road Truckers*.

"We're an entrepreneurial, adventurous culture," she says.

That spirit pervades the logistics sector throughout Alaska, where employees feel

responsible for the health, safety, and wellbeing of residents. Logistics providers serve as their lifeline to the rest of the world, particularly in rural locations.

"Alaska is highly dependent on logistics for success," says Prokop.





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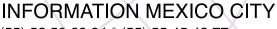
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Casebook by Justine Brown

Going Green to Save Green

ately it seems passenger vehicles, not freight trucks, are in the sustainability fast lane. In August 2012, the Obama administration announced strict new fuel economy standards for cars and light trucks. By 2025, passenger vehicles sold in the United States are projected to get 54.5 miles per gallon, on average. But, while passenger vehicles progressively benefit from technology that cuts emissions even as activity increases, freight is getting left behind.

Can reducing environmental impact generate significant financial rewards? For Caterpillar, the proof is in the profits.

"Freight will be the bad guy because passenger vehicles and light trucks are cleaning up their acts," says Jason Mathers, project manager for the Environmental Defense Fund (EDF), a nonprofit organization that helps companies improve environmental and business performance. "It is difficult to make a big diesel truck fuel-efficient."

Yet truck deliveries are on the rise. Currently, trucks exclusively serve more than 80 percent of U.S. cities and towns. By 2020, 90.1 million tons of freight are expected to move throughout the United States daily. And freight trucks are on pace to increase their carbon emissions by 40 percent over the coming decades, according to the Department of Energy's Annual Energy Outlook. These factors combined mean companies that ship any type of freight will face growing pressure to make operations more eco-friendly and sustainable.

Despite the obstacles, "companies can tap a wide range of operational strategies to improve environmental performance," says Mathers.

To prove that freight trucks can become more green, EDF reached out to a few private companies, as well as the MIT Center for Transportation and Logistics, Cambridge, Mass., which coordinates supply chain research efforts and helps organizations increase productivity



and reduce economic and environmental impact. EDF offered to demonstrate how reducing emissions through logistics was indeed possible, and that such efforts often reap the added benefit of reducing costs.

"EDF asked us to document their projects, and help give companies a pathway toward opportunities for improving cost efficiency and becoming more environmentally friendly," says Dr. Edgar E. Blanco, research director at the MIT Center for Transportation and Logistics. "We then hired researchers and dedicated significant time working with the companies alongside EDF."

Caterpillar was one of the first companies EDF contacted. The Peoria, Ill.-based manufacturer of construction and mining equipment, diesel and natural gas engines, industrial gas turbines, and



diesel-electric locomotives was working on a long-term sustainability strategy, and was interested in participating in the study.

"Internally, we are looking at ways to make our own operations more efficient. Externally, we are trying to find ways to make our customers more efficient," says Terry Goff, Caterpillar's director of emissions regulation and conformance. "The EDF project fit perfectly into our corporate-wide strategy to provide work environments, products, services, and solutions that make efficient use of the world's natural resources and reduce unnecessary impacts on people, the environment, and the economy."

Caterpillar chose its Global Mining division, based in Decatur, Ill., as the basis for the study. "We wanted to hone in on one facility to fully develop the detailed sustainability process before we applied it across the company," says Goff.

Streamlining and Consolidating

To launch the study, EDF and MIT analyzed the inbound shipping operations of Caterpillar's large mining truck facility. They wanted to identify opportunities—based on weight, packaging, routing, and scheduling—to streamline shipping protocols and reduce carbon emissions associated with the supply chain. Through this analysis, EDF and MIT identified two key areas—packaging and consolidation—that would potentially reduce costs and carbon emissions.

Packaging: To take delivery of the thousands of parts required to manufacture a mining truck, Caterpillar uses large returnable steel containers, which are specially designed to protect and transport parts. The containers vary in shape and size, and can hold loads ranging from 3,000 to 6,000 pounds. Many of these containers have been in circulation for more than 50 years.

For the past four years, Caterpillar has been working to phase out the steel containers and replace them with plastic containers,

which weigh considerably less: a steel tote box weighs 235 pounds; a comparable plastic container weighs 70 pounds. Lower packaging weight translates to lower shipment weight, requiring less fuel to truck parts to Caterpillar's plant.

Consolidation: To construct the very large vehicles used in the mining industry, parts are shipped to the Decatur manufacturing plant from all over the world. Currently, most suppliers ship directly to the plant, regardless of geographical proximity. EDF and MIT analyzed historical shipment data to identify areas where shipments could be consolidated to save fuel and reduce vehicle CO₂ emissions.

A number of requirements and constraints came into play when considering inbound shipment consolidation. First, each part requires a certain type of packaging and handling to ensure safe delivery. At the same time, shipment weight and shipping vehicle capacity limit the number of shipments eligible for consolidation. Many parts required for the min-

ing vehicles are sizeable, and storing them for long periods is not a viable option. Shipments need to arrive on time according to their scheduled assembly process to minimize storage costs and optimize production. Finally, adding stops to an existing route increases time and costs, and must be offset by a total cost savings and emissions reduction.

I Got Algorithm

Taking these factors into account, and in order to estimate the cost and environmental benefits of inbound supplier consolidation, EDF and MIT developed a shipment-clustering algorithm. To develop this algorithm, they:

- Identified suppliers within a 30-mile radius, then placed each supplier in a cluster.
- Analyzed all shipments to the Decatur plant within the same week for each supplier in a cluster.
- Identified parts for each shipment that used the same type of transportation container—totes or racks, for example—to ensure equipment compatibility.



- Identified pairs of compatible shipments that could be consolidated while keeping the extra distance traveled to pick up the shipment at no more than 50 percent.
- Chose only the shipments that were profitable after the extra stop charge and travel distance.

Realizing Results

Through the study, EDF and MIT determined that light-weighting shipping containers had the potential to reduce CO2 total emissions by 16.5 percent across Caterpillar's North American network. Carriers transporting Caterpillar parts would also save fuel by moving lighter shipments, and would pass on some of these savings to Caterpillar in lower fuel bills and lower fuel surcharges. And, clustering inbound shipments would allow for an additional emissions reduction.

"The carbon reduction was more significant than I had estimated," says Mathers. "And at the same time, Caterpillar was able to save on transportation. It was satisfying to put numbers to efforts through this study, and look at how we might get more cargo on trucks in order to bring down carbon emissions and costs."

Prior to the EDF/MIT study, Caterpillar's internal analysis had already determined that the fuel savings from lightweighting inbound containers would be significant. Yet Caterpillar had been slow to adopt the plastic containers because of several internal organizational and budgetary constraints:

- While the estimated return on investment was relatively quick, the company still needed to allocate capital to replace the steel containers.
- It would take time to roll out the new plastic containers across all suppliers.
- The containers' light weight created greater risk of misplacing a container, so Caterpillar needed to put tracking mechanisms in place.
- Product designers had to take into account the new containers as they developed new features in each truck model, to maximize re-use rates.

While these constraints initially slowed the transition, the study results had the opposite effect. Solid scientific evidence of the proposed changes' effects helped reinvigorate efforts to replace old steel containers with lighter plastic containers.

"As a result of the study, the Decatur team outlined a process to move from its current packaging procedures to the lighter-weight options, all while following the Caterpillar Production System principles," says Goff. "The new packaging process also drove changes in other areas such as receiving and transportation. This project brought visibility to opportunities Caterpillar can capture to substantially improve internal processes by initiating moves to lightweight packaging."

Added benefits that are harder to measure financially are the lighter containers' ease of handling, and the opportunity to further standardize inbound shipments.





Caterpillar also experienced unexpected safety benefits. "The lighter-weight packaging offered some safety benefits, and allowed improved flow to the point of use," says Goff. "The supplier involved with our pilot program also reported the lighter-weight packaging improved its safety and flow."

Planning for the Future

Currently, freight transportation accounts for only 10 percent of total global emissions. This statistic means MIT's Blanco occasionally must field questions regarding the necessity of studies such as the one conducted with EDF and Caterpillar.

"Evidence suggests that transportation-related emissions are increasing faster than other emissions, and they will continue to grow," says Blanco. "We need to find ways to curb that growth sooner rather than later."

"Transportation-related emissions are on the wrong trajectory," agrees Mathers. "But shippers can find opportunities to increase efficiencies and reduce emissions by selecting modes carefully, consolidating loads, and siting distribution centers in centrally located geographies. Shippers occupy a privileged position from which they can influence a huge, global community of manufacturers, retailers, and service providers, including transportation companies."

While sustainability requirements may seem like just another compliance headache to many companies, the dynamics of transportation and logistics mean a reduction in emissions can also help the bottom line.

"In transportation, what's good for the environment is also good for business; you don't find that in all industries," says Mathers. "Freight is an area ripe for saving money through sustainable practices."

"The Caterpillar study is a great example of how a company can drive savings to the bottom line and improve sustainability at the same time," adds Blanco.

Worth the Work

"Changing our packaging and transportation involved some upfront work, but the benefit—saving money through a more sustainable process—is worth that extra effort," Goff says. "The correlation between process efficiency and environmental benefit is a strong driver for innovative and environmentally friendly business choices."

Armed with data from the study, Caterpillar clearly understands the benefits of light-weighting and load consolidation, and is committed to following a well-scheduled program of sustainability improvements into the future.







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Kane Is Able

TITLE: Strategies to Reduce Logistics Costs in the CPG Supply Chain

DOWNLOAD: www.kaneisable.com/strategies-reduce-logistics-costs-cpg-supply-chain

SUMMARY: Is your CPG company responding to the pressure to minimize

operational costs with incremental improvements to existing distribution processes? Or are you exploring logistics strategies that alter current processes and the way you work with retail customers? A mix of both is optimal, with new strategies offering the best potential for breakthrough gains and cost savings. This whitepaper from Kane Is Able suggests five strategies – some new, some tried and true – for CPG

manufacturers to consider.

Saddle Creek Logistics Services

TITLE: Top Business Drivers for Integrated Logistics Outsourcing

DOWNLOAD: www.sclogistics.com/news-resources/white-papers

SUMMARY: Today, more and more companies are asking their logistics partners to provide services beyond transportation and warehousing. They're discovering that tapping a single provider for a variety of value-

added services can help them control costs, accommodate business fluctuations, and streamline operations. Saddle Creek Logistics Services' new research-based report examines the broader role that

3PLs are being asked to play in today's marketplace.

3PL Central

TITLE: Growing Your 3PL by Supporting Multi-Channel Warehousing

DOWNLOAD: www.3plcentral.com/multi channel growth webinar

SUMMARY: The fast-growing trend toward multi-channel distribution could provide your 3PL with one of its largest growth opportunities in years. To learn what your 3PL must do to prosper in this new environment, watch 3PL Central's webinar, Growing Your 3PL by Supporting Multi-Channel Warehousing, today.





enVista

TITLE: Freight Term Optimization: Reduce Costs and Increase Margins

By Managing the Right Freight

DOWNLOAD: http://bit.ly/Yf6Jqj

SUMMARY: We all know that moving freight the right way reduces transportation

cost, but often overlooked is the value of moving the right freight – Freight Term Optimization. In this whitepaper from enVista, you'll learn about the financial benefits of Freight Term Optimization, get tips for negotiating with your customers and suppliers, and learn how to

capture the savings of your optimized freight.

Amber Road

TITLE: A Model for Value Chain Transformation

DOWNLOAD: http://bit.ly/13DG5vr

SUMMARY: Increased scrutiny of supply chain security, and more stringent

regulatory controls, have brought Global Trade Management (GTM) to the forefront of priorities for many companies. To help improve GTM operations, Gartner designed a GTM Maturity Model outlining the defining characteristics of companies in each of the four stages of

maturity:

Stage 1: Market-Focused

Stage 2: Cost-Focused **Stage 3:** Demand-Driven

Stage 4: Value-Driven

A Model for Value Chain Transformation helps companies assess where they fall within the Gartner GTM Maturity Model, and charts a reasonable course for improvement. Learn how you can drive value and advance to the next level of GTM maturity by downloading this research.

Weber Logistics

TITLE: How to Reduce Chargebacks in Your Vendor Compliance Program

DOWNLOAD: http://bit.ly/ZUoLdH

SUMMARY: Retailer chargeback fines are a profit-draining reality for many

CPG vendors. But the right strategies can avoid hundreds of thousands – even millions – of dollars in lost profit. This whitepaper offers background on the origins and rationale for chargebacks, and a seven-step process for avoiding or overturning these costly penalties.

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WhitePaper Digest is designed to bring readers up-to-date information on all aspects of supply chain management. We're building a database of SCM whitepapers, and you can help. E-mail us with whitepaper recommendations: editorial@inboundlogistics.com

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INBRIEF

NEW SERVICES & SOLUTIONS



//Products//

The Wedway Refrigeration Power System, developed by **Emerald Technology Partners**, runs entirely on kinetic energy captured from the rotation of trailer or railcar wheels. The system, which replaces dieselpowered refrigeration systems on reefer trailers and railcars, also stores energy to run the refrigeration unit when the trailer or railcar is parked.

Mitsubishi Forklift Trucks released a series of 4,500- to 6,500-pound capacity electric four-wheel cushion tire forklift trucks. The FBC22N2-FBC30LN2 series includes operator ergonomics, energy-efficient technology, and easy access to routine service components, resulting in decreased maintenance downtime.

Available in six sizes, TiltView bins from **AkroBins** offer users an expandable, high-density storage system to improve organization and efficiency. The bins feature 16-gauge steel construction and powder-coat paint that stand up to daily use in a variety of settings.



Have a new logistics-related product or service? Tell our readers about it!

Send an email with details to: InBrief@InboundLogistics.com

The 7200 Series label printerapplicators from **FOX IV Technologies** feature a 166MHz processor, standard connectivity, large roll capacity, and multiple mounting orientations. Label application options include twopanel labeling, tamp, blow-on, and tamp-blow.

Transport Security's ENFORCER Seal Guard Lock protects trailer seals from unauthorized removal and tampering

while in transit, and accommodates cable, plastic, metal, and bolt seals. The lock's design allows it to be mounted on existing trailer latches.

The **Serco** Thermal Guard package for Serco vertical storing dock levelers provides an energy and security seal for climate-controlled loading docks. This package allows truck doors to be opened from inside the building after the truck is positioned at the door

without breaking a thermal seal at the

Hyundai's 60L-7A and 70L-7A LP Gas forklifts are suitable for indoor or outdoor applications including warehouses and manufacturing facilities. Both models feature a GM 4.3L V6 LP 95 horsepower engine, hydrostatic power steering, and ergonomic seating.

Legal Notice

If You Purchased Freight Forwarding Services

You Could Get Benefits from a Class Action Settlement

A class action lawsuit claims that freight forwarders throughout the world ("Defendants") conspired to fix prices for their services, including on routes between the U.S. and China, Hong Kong, Japan, Taiwan, and the U.K. Some of the companies who were sued have agreed to Settlements. These "Settling Defendants" are ABX Logistics Worldwide NV/SA; EGL, Inc. and EGL Eagle Global Logistics; Expeditors International of Washington, Inc.; Kuehne + Nagel International AG and Kuehne + Nagel, Inc.; Morrison Express Logistics Pte. (Singapore) and Morrison Express Corporation (U.S.A.); Nishi-Nippon Railroad Co., Ltd.; Schenker, Inc. and its parents, subsidiaries, and affiliates, including Deutsche Bahn AG, Schenker AG, and Bax Global, Inc.; United Aircargo Consolidators, Inc.; UTi Worldwide, Inc.; and Vantec Corporation and Vantec World Transport (USA), Inc. The lawsuit continues against the Non-Settling Defendants (see the website below for a list). The Settling Defendants vigorously deny they did anything wrong. They have asserted a number of defenses but have agreed to settle to avoid the cost and risk of trial. The case is continuing against non-settling defendants.

Am I Included?

You may be included in one or more of the Settlements (as a Class Member) if you: 1) Directly purchased Freight Forwarding Services; 2) from any of the Settling or Non-Settling Defendants, their subsidiaries, or affiliates; 3) from January 1, 2001 through September 14, 2012; 4) in the U.S., or outside the U.S. for shipments within, to, or from the U.S. "Freight Forwarding Services" means freight forwarding, transportation, or logistics services for shipments, including services relating to the organization or transportation of items via air, ocean, rail, and road, both nationally and internationally, and related activities such as customs clearance, warehousing, and ground

services. All you need to know is in the full Notice, including information on who is or is not a Class Member.

What Do the Settlements Provide?

The Settling Defendants will establish a Settlement Fund with a minimum of \$105,611,864.54.

How to Get Benefits?

If you are a Class Member and do not opt out of these Settlements, you are eligible to submit a claim and receive benefits. The amount of your benefits will be determined by the Plan of Allocation, which will be posted on the site www.FreightForwardCase.com on or before March 4, 2013. You can obtain a Claim Form by calling 1-877-276-7340 or visiting www.FreightForwardCase.com. The claims deadline is November 22, 2013.

Your Other Rights

If you do not want to be legally bound by one or more of the Settlements, or you want to sue a Settling Defendant separately about the claims in this lawsuit, you must exclude yourself in writing by identifying each Settlement for which you seek exclusion. The exclusion deadline is **June 25, 2013**. If you stay in a Settlement, you may object to it by **June 25, 2013**. The Detailed Notice, available at the website below, explains how to exclude yourself and object. The Court has appointed lawyers to represent you at no charge to you. You may hire your own lawyer at your own cost. The Court will hold a hearing on **August 9, 2013, at 10:00 a.m.** to consider 1) whether to approve the Settlements and plan of distribution, and 2) Class Counsel's request for fees of up to 33% of the Settlement Fund, plus interest, and reimbursement for their expenses. You or your own lawyer may ask to appear and speak at the hearing.

This notice is only a summary. For detailed information: Call U.S. & CANADA: 1-877-276-7340 (Toll-Free), INTERNATIONAL: 1-503-520-4400 (Toll), or Visit www.FreightForwardCase.com

INBRIEF

//Technology//

Roadnet Technologies,

a vehicle routing and transportation management software company, launched Roadnet Transportation Suite 3.60, which incorporates upgrades to track service time maintenance intervals, improve the quality of location delivery cost reports, and address a variety of product and delivery variables.

Complete Innovations launched Fleet Complete Action Tracker HOS, an Android tablet application that automates Hours of Service and Driver's Vehicle Inspection activities. The app automatically logs driving



The Algiz 10X rugged tablet from **Handheld US** provides mobile computing capabilities for any environment. The tablet has built-in GPS, a variety of Internet connection options, and a 5.0 megapixel camera. It weighs only 2.9 pounds, allowing for use in many transportation, yard, and warehouse applications.

hours and calculates driving availability, reducing the chances of human error and replacing the need for manual paperwork.

Global trade management solutions provider **QuestaWeb** and **AduanaSoft**, a provider of software solutions that automate Mexico Customs

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clearance, allied to create a global trade management software solution for U.S. companies manufacturing in Mexico. The new software automates compliance and expedites product movement between the two countries.

Aegis Mobility's FleetSafer mobile app automatically detects when a phone is moving and puts it in safe mode, suppressing audible alerts associated with inbound calls, and tracking physical manipulation of the device, including opening or closing the phone, or pressing the "end" key. This tracking allows shippers to monitor and measure driver compliance with company policies regarding phone use while driving.

Quintiq 5.0, a supply chain planning and optimization platform from Quintiq, helps shippers make informed supply chain decisions based on real-time data. The software's platform enables personalized views, facilitates errorfree planning, provides built-in monitoring for key performance indicators, and adapts to companies' individual planning constraints.

The Anytime Supply Chain Windows 8 Dashboard, developed by **e2b teknologies**, helps material planners and buyers manage their supply chains. The program provides distributors and manufacturers with a list of suggested purchase orders,

transfer orders, and work orders to help avoid stockouts and material shortages.

//Transportation//

To meet growing demand in the Caribbean, **Crowley Maritime Corporation** added a Saturday sailing from Port Everglades, Fla., to Nassau, Bahamas. The service includes full containerload, less-than-containerload, and refrigerated transportation.

UPS expanded its preferred less-thancontainerload expedited ocean freight service to include Western Europe. The expansion provides shippers

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with access to ports in Germany, the Netherlands, Belgium, and the United Kingdom, cutting port-to-door delivery time to the United States by up to 40 percent.

DHL Express now offers A300 freighter service five times weekly from Penang, Malaysia, to Hong Kong. DHL's connection from Hong Kong to Los Angeles enables shippers to use its one-day intercontinental express delivery service from Penang to all U.S. West Coast destinations.

Preston, Md.-based ChopTank
Transport launched a refrigerated
less-than-truckload (LTL) freight
division. The service currently entails
nationwide outbound delivery and
a concentration of consolidation
capabilities from Massachusetts to

Cognex Corporation, a supplier of industrial ID systems, added five new bar-code readers to its DataMan line. The DataMan readers are image-based rather than laser-based, offering higher read rates, performance feedback, and reliability. Three of the new models also provide ethernet connectivity.

Virginia, with expansions planned for the Mid-Atlantic and Northeast regions.

Yusen Logistics added a new 11-day route from Busan, South Korea, to Los Angeles. The new service accommodates LCL and full containerload shippers, and features weekly sailings departing Busan on Sunday.

A new Intra-Asia cost-per-mile service from **Evergreen Line** provides regional transportation links for shippers in South China, Philippines, and east Malaysia, while also connecting the three countries to Evergreen's global network via Hong Kong.

//Services//

Con-way Freight, an LTL carrier and subsidiary of Con-way Inc., opened a service center in Laredo, Texas, to act as a primary gateway for operations into Mexico. The facility contains a 70,000-square-foot, 142-door dock, and an in-bond area to maintain the integrity of shipments already under Customs bond.

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Drawback.NET opens up the viability for in-house drawback processing to virtually anyone. Industries such as automotive, chemical, electronics, and retailing, as well as many other business sectors, can benefit from the software system's nearly unlimited database capacity powered by the SQL Server Database Engine.

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Online Demonstrations Available by Appointment



SICK USA launched its deTec4 Core light curtain, which can be positioned in any location on warehouse or manufacturing equipment housing without causing blind zones, and has a built-in automatic range detection of 30 feet, reducing the need for manual setup. The curtain operates in temperatures as low as -22 degrees Fahrenheit, and comes in a range of heights and resolutions.



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3PLs



3LINX • www.3linx.com

3LINX will warehouse your inventory in secure and insured distribution centers, and fulfill orders in a manner where every shipped box speaks as highly as your brand. 3LINX pays attention to the little things so that your customers feel like theirs was the only order packed. Service features include: free receiving (count verification, damage reporting), one-business-day or same-day fulfillment turnaround, pick-and-pack fulfillment, branded packing slips, returns processing, and much more.

Agility • www.agilitylogistics.com

Let Agility manage the details of your international transportation. Choose from an array of highly configurable air and sea freight options, and road freight services that span Europe, the Middle East, North Africa, and Central Asia with more than 1,000 scheduled, weekly departures. Agility offers global expertise in commodity classifications, and local government rules and regulations to ensure rapid clearance of your products through Customs.





Al-Futtaim Logistics • www.aflogistics.com

Al-Futtaim Logistics is a leading supply chain management company based in Jebel Ali, UAE. Established in the 1980s, Al-Futtaim Logistics is one of the region's largest and most respected logistics service providers, with global reach through its strategic alliances. The company's logistics services are designed to meet the needs of several key sectors, including automotive, retail and fashion, FMCG, electronics and high-tech, humanitarian, project cargo, and industrial solutions. Our capabilities extend to freight forwarding and Customs clearance; warehousing and contract logistics; transportation and distribution; people transportation; and relocations. Al-Futtaim Logistics is an Al-Futtaim Group company, and operates across the UAE, Bahrain, Kuwait, Qatar, Oman, Saudi Arabia, Syria, Pakistan, Sri Lanka, Singapore, Malaysia and Europe.

Atlanta Bonded Warehouse Corporation (ABW) www.atlantabonded.com

Atlanta Bonded Warehouse Corporation (ABW) has provided public and contract food-grade, temperature-controlled distribution, and co-packaging services for over 60 years. Our award-winning services, superb metro Atlanta location, exceptional facilities, and excellent safety record combine to satisfy our customers' most stringent risk management and customer service requirements. With our in-house carrier, Colonial Cartage Corporation, ABW is the only provider you need for your Southeastern asset-based logistics needs.







C.H. Robinson Worldwide, Inc. • www.chrobinson.com

Founded in 1905, C.H. Robinson Worldwide, Inc. is one of the largest third-party logistics companies in the world, providing multimodal transportation, fresh produce sourcing, and information services to more than 32,000 customers globally, ranging from Fortune 500 companies to small businesses in a variety of industries. For more information about our company, visit our Web site at www.chrobinson.com.

ChemLogix, LLC • www.chemlogix.com

ChemLogix, LLC is the leading provider of comprehensive chemical industry logistics management outsourcing and technology services that, together with its supply chain consulting resources, enable its clients to improve performance and drive economic value. ChemLogix is dedicated to solving its customers' most vital logistics challenges by leveraging chemical industry expertise, best-of-breed technology, and a personalized, high-touch approach to deliver measurable, sustainable value. For more information, visit www.chemlogix.com or email information@chemlogix.com.





Choice Logistics • www.choicelogistics.com

Choice Logistics provides customized service parts logistics solutions that meet the high-availability requirements of global technology manufacturers and third-party service organizations. Its global network of more than 800 available forward stocking locations in over 80 countries are linked by dependable transportation solutions, visible through a unified technology platform, and orchestrated by a performance-driven culture, enabling companies to deliver premium hardware support services that help grow revenues, relationships, and reputations. Learn why industry leaders trust Choice Logistics as their service parts logistics partner.

Conexus, LLC • www.conexuslogistics.com

Conexus, LLC offers a wide variety of transportation services throughout the United States, Canada, and Mexico. Regardless of how much freight you have or where you are located, we make certain that your transportation needs are met in a secure and timely manner. Services include truckload; less-than-truckload; including dry van and flatbed; standard flatbed; specialized flatbed; temperature-controlled; over-dimensional and heavy haul; power only; expedited air and ground; and intermodal.



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Crowley Logistics • www.crowley.com/partner

If you think Crowley offers just ocean freight services, think again. Sure, it provides liner shipping and cargo carrier services throughout Latin America, Puerto Rico, and the Caribbean Basin, employing the latest vessels, equipment, and communication technologies. But Crowley is also one of the most diversified transportation companies in the world, developing innovative supply chain solutions backed by deep relationships throughout the region, far-reaching resources, and an impeccable reputation worldwide. With its extensive shipping capacity, as well as thousands of containers, trailers, and other intermodal components, Crowley ensures the reliability of every link in your supply chain.

D&D Distribution Services • www.dd-dist.com

Full-service public warehousing and distribution services provider D&D Distribution Services is centrally located in York, Pa., near the mid-Atlantic region's major metropolitan areas and seaports. We serve customers around the globe, developing customized logistics and customer service solutions. Handling raw materials at the front end of the supply chain, and finished goods at the back, D&D Distribution Services develops flexible programs to accomplish customers' goals.





Global Link Logistics • www.globallinklogistics.com

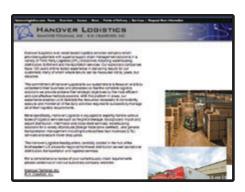
Global Link Logistics is your leader in containerized ocean freight and supply chain visibility, specializing in Asian/U.S. trade lanes. We deliver a full scope of ocean freight services, air freight, origin/destination services, supplier management, brokerage, and technology offerings. We provide experienced management so you can outsource with confidence. We're committed to keeping you informed throughout the process.

GlobalTranz Enterprises, Inc. • www.globaltranz.com

Founded in 2003, GlobalTranz is a transportation management company head-quartered in Phoenix, Ariz., specializing in LTL, FTL, supply chain logistics and warehousing. In addition to these services, GlobalTranz operates its own in-house freight forwarding division via our expedited services department, which offers expedited ground, ocean, and airfreight solutions. Local to national accounts engage our free state-of-the-art technology, CarrierRate.com, which optimizes the flow and storage of merchandise as goods move within, and throughout, the customers' supply chain.







Hanover Logistics • www.hanoverlogistics.com

Hanover Logistics is an asset-based logistics services company providing customers superior supply chain management solutions in a variety of third-party logistics (3PL) disciplines, including warehousing, distribution, fulfillment, and transportation services. Hanover Logistics is equipped to expertly handle various types of logistics services including: freight brokerage, food/grocery storage and distribution, intermodal/cross-dock services, warehousing solutions for a variety of products (AIB certified, food grade), and general transportation management including truckload, LTL, and container hauling services.

Kuehne + Nagel • www.kuehne-nagel.com

Kuehne + Nagel, a global leader in transportation and logistics, is one of North America's foremost integrated logistics services providers. Our superior service and end-to-end supply chain capabilities—including sea and air freight, 3PL, 4PL, distribution, and information management solutions—turn your logistics challenges into a competitive advantage. A global leader in international forwarding, Kuehne + Nagel ranks as the Number 1 global seafreight forwarder, Top-2 global air cargo forwarder, and Top-3 global contract logistics provider. The company, founded in 1890, has over 63,000 employees at more than 1,000 locations in over 100 countries.





Lynden • www.lynden.com

Over land, on the water, in the air – or in any combination – Lynden has been helping customers solve transportation problems for almost a century. Operating in such challenging areas as Alaska, Western Canada and Russia, as well as other areas around the globe, Lynden has built a reputation of superior service to diverse industries.

LynnCo Supply Chain Solutions • www.lynnco-scs.com

LynnCo specializes in value-added supply chain solutions. We create tailored solutions by taking redundant links out of our clients' logistics networks. Whether it's upfront due diligence studying current distribution patterns, rationalizing facilities with state-of-the-art optimization tools, or analyzing entire supply chain networks, our mission is to provide our clients world-class solutions - creating bottom-line value.



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Mallory Alexander International Logistics ● www.mallorygroup.com

Mallory Alexander International Logistics is a leading third-party logistics (3PL) provider. As a specialist in global logistics and supply chain services, Mallory Alexander acts as a single source for all logistics and supply chain needs. Specifically, Mallory Alexander provides public and contract warehousing, freight forwarding (international, domestic, air, and ocean), customs brokerage, import/export services, intermodal trucking and transportation, logistics services, and consulting.

Menlo Worldwide • www.menloworldwide.com

Some of the toughest, most complex logistics challenges in the world are met with customer-specific IT solutions engineered, installed, and managed by Menlo Worldwide. When it's time to cut waste and cost from your supply chain, think Menlo Worldwide. To learn more, visit us at www.menloworldwide.com.





MIQ Logistics • www.miq.com

Started in 2002, MIQ Logistics has locations in Asia, Europe, North America, and South America. Along with its global network partners, MIQ Logistics provides services in and between more than 80 countries supported by more than 5,000 in-country logistics professionals. Its broad portfolio of global, transportation, and distribution services makes it possible to offer global end-to-end supply chain solutions supported by the visibility of Web-native technology. If your business is seeking supply chain improvements, let MIQ Logistics add value to your business.

New Breed • www.newbreed.com

New Breed is a third-party logistics company that brings new levels of visibility and control to complex logistics operations. We combine methodical analysis of your material flows with the intelligent application of systems to reduce and automate process steps - across your supply chain or in your distribution center. Some of the world's most respected companies rely on New Breed minds to streamline logistics operations in support of manufacturing, distribution, returns, refurbishment and repair, and service parts logistics.







PartnerShip • www.partnership.com

PartnerShip® is a leading provider of shipping solutions to small businesses nationwide. We have over 20 years of experience managing LTL freight, small package, tradeshow, and specialized shipping services for over 100 association groups and thousands of businesses. Founded in 1989, today we have offices in Cleveland, Ohio, and Irvine, Calif. Call us at 800-599-2902 or visit www.PartnerShip.com.

ProTrans International, Inc. ● www.protrans.com

ProTrans International, Inc. is a U.S.-based transportation and supply chain management provider that specializes in third-party logistics, consolidation, and customs brokerage. ProTrans is committed to providing innovative logistics solutions that optimize customers' time, money, and resources through value-added service enhancements, leading-edge technology development, and highly skilled customer support specialists. The company is headquartered in Indianapolis, Ind., and operates out of 25 centers throughout Canada, Mexico, and the United States.





R2 Logistics • www.r2logisticsteam.com

Founded in 2005, R2 Logistics is a global provider of transportation services and logistics solutions. As a third-party logistics company, we provide access to more than 20,000 contracted transportation providers. With four operating branches located in Columbus, Ohio; Dallas, Texas; Detroit, Mich.; and Jacksonville, Fla., we are able to provide your company with any possible over-the-road shipping need nationwide, including Mexico and Canada. With the dedication of our employees, and our culture of Reliable Service and Relentless Passion, we've built a strong reputation as an industry leader.

RMX Global Logistics • www.rmxglobal.com

Your Single Source Logistics Provider...Customer-Focused by Design. At RMX Global Logistics, we're here to find logistics solutions for you 24 hours a day, seven days a week. Our state-of-the-art systems manage more than 150,000 moves each year. That means we have the strength and capacity to meet your most demanding needs, along with the flexibility to customize operations to your unique requirements. For a partner with in-depth understanding of supply chain management and an international logistics network, look to RMX Global Logistics...The Logistical Choice.



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ROAR Logistics • www.roarlogistics.com

Founded in 2003, ROAR (Rail, Ocean, Air, Road) has rapidly become a leading transportation services provider, serving customers worldwide. A subsidiary of Rich Products Corp., ROAR views transportation from the perspective of the shipper, delivering value through world-class customer service, cutting-edge technologies, and competitive pricing. Call on ROAR for your truckload, LTL, domestic intermodal, import/export ocean, and global air cargo needs. Call 888-292-7627, e-mail: info@roarlogistics.com, or visit: www.roarlogistics.com.

R.R. Donnelley Logistics • www.rrd.com

Experience the benefits that only come from working with a major, global shipper that is also a top-ranked 3PL. We offer multiple transportation modes, an established multi-carrier network, volume-leveraged rates and service levels, along with technology-enabled systems and processes. Visit our web site and contact us today to see why customers have relied on us for nearly 150 years.





Ryder • www.ryderscs.com

Ryder Supply Chain Solutions is an end-to-end supply chain partner with nearly 80 years of experience helping customers in North America, the UK, and Asia transform their supply chains by delivering the best in operational execution. Ryder provides a full range of services, from optimizing day-to-day logistics operations to synchronizing the supply of parts and finished goods with customer demand. At Ryder, we understand that when it comes to logistics, Execution is Everything.

Seaonus • www.seaonus.com

Seaonus is an asset-based logistics company with organizations that operate in multiple points of the logistics network including stevedoring, dry and temperature-controlled warehousing, and freight services. Headquartered in Jacksonville, Fla., and with operations in Mobile and New Orleans, we're constantly expanding our outstanding service to provide total solutions across the country, at port and beyond. Whatever it takes to deliver shipments from point to point is where our focus and resources will remain because we are most interested in taking our customers—and their cargo—to the next level.





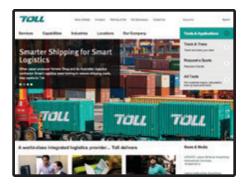


Sunland Logistics Solutions • www.sunlandlogisticssolutions.com

Sunland provides warehousing and value-added services, transportation solutions, and contract staffing solutions with specializations in the automotive, chemical, retail, and paper industries. The company currently operates 2 million square feet of warehousing space based in the Greenville/Spartanburg area and Charleston, S.C. Sunland provides overnight delivery to the entire Southeast via truck, rail, and intermodal with international access to the Port of Charleston and the new Inland Port in upstate South Carolina. Sunland Logistics Solutions helps customers do what they do...better!

Toll Global Forwarding • www.tollgroup.com

Toll Global Forwarding (TGF) provides a full range of international freight forwarding and advanced supply chain management solutions to the international trade community. Our services are tailored to meet our customers' needs for imports, exports, and project logistics. We have the capability and experience to move your goods from the point of procurement, worldwide to any nominated export or import destination. TGF offers door-to-door services via air and ocean, as well as integrated distribution, transload, drayage, and line-haul transportation services. Toll Global Forwarding is a division of the Toll Group, the Asia Pacific's leading provider of integrated supply chain solutions.





Trans-Trade, Inc. • www.transtrade.com

Trans-Trade, Inc. is a fully integrated provider of flexible, cost-efficient supply chain solutions and unparalleled customer service. Our dedicated professionals' deep industry knowledge, innovative technology, and extensive menu of services create a brand of excellence we bring to every customer relationship—a Partnership of Strength for the Future. Services include: supply chain management and design, international freight forwarding, customs brokerage, domestic transportation management, inventory management, and distribution. To learn more, please contact Trans-Trade at 1-800-880-8173.

UniGroup Logistics • www.unigrouplogistics.com

Managing a supply chain is complex. And your business is unique. Let UniGroup Logistics design a solution tailored to your needs. We'll show you the way to a more efficient logistics solution. UniGroup Logistics is a new name, but the foundation of the company is well-established. It is built on the heritage of United Van Lines and Mayflower Transit, trusted providers of reliable specialized transportation and logistics services for more than 50 years. Based on a network of 1,300 service centers in 146 countries, we are a single source for customized supply chain solutions. Whether your supply chain is domestic or international, UniGroup Logistics manages a global network of resources to show you the way to seamless, dependable, and efficient solutions.



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Wagner Logistics • www.wagnerlogistics.com

Wagner Logistics is not just a trucking company, warehousing company, or any other narrowly defined organization. We're a third-party logistical services company with multiple competencies to provide diverse services for our many customers across the United States. We provide contract trucking and transportation management, distribution centers, warehousing centers, packaging and assembly operations, and fulfillment. Plus, all services are provided with the highest standards of quality and the most technologically advanced information management systems. With our many areas of expertise, we can tailor a supply chain solution for your company to provide you with superb service while lowering your net cost.

West Logistics Group • www.westlgi.com

The West Logistics Group, a third-party logistics company specializing in grocery, consumer, and industrial products, lives and breathes customer service. The company's relationship-based philosophy is based on deep commitments to any size customer—large or small. Whether you need storage, distribution, transportation, or consultation, let West Logistics Group service your world. Get started by visiting the Web site now.





Worley Companies • www.worleycompanies.com

Worley Companies is a 3PL whose food grade facilities and service offering are guided by our ISO 9001-2008 and organic certifications. Our clients are world-class CPG and food manufacturers. We offer temperature-controlled and ambient storage options to meet your ingredient or finished product needs. Our order fulfillment (B2B and B2C) and value-add services are managed by our WAREPAK/400 WMS. Our secured facilities are ISO 9001-2008 and organic certified, as well as C-TPAT compliant.

4PLs

Kuehne + Nagel • www.kuehne-nagel.com

Kuehne + Nagel, a global leader in transportation and logistics, is one of North America's foremost integrated logistics services providers. Our superior service and end-to-end supply chain capabilities – including sea and air freight, 3PL, 4PL, distribution, and information management solutions – turn your logistics challenges into a competitive advantage. A global leader in international forwarding, Kuehne + Nagel ranks as the Number 1 global seafreight forwarder, Top-2 global air cargo forwarder, and Top-3 global contract logistics provider. The company, founded in 1890, has over 63,000 employees at more than 1,000 locations in over 100 countries.





AIR/EXPEDITED



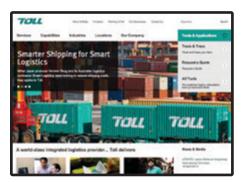
All State Express • www.allstateexpress.com

All State Express, a WBENC-certified enterprise, has excelled as a leading expedited transportation provider in North America for over a decade. As we have grown forward, we have diversified our portfolio to include a full spectrum of truckload and logistics services. We apply the same responsiveness and proactive management required for success in expedited transport to all transactions and across the logistics services we provide, aided by industry-leading, Web-based technology. Visit the Web site to discover how All State Express can perform as a critical link to your enterprise's supply chain improvement programs.

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NFI is a fully integrated supply chain management provider offering logistics, distribution, warehousing, intermodal, global, commercial real estate, consulting, transportation brokerage, and solar services across the U.S. and Canada. NFI owns facilities nationwide and globally, more than 2,000 tractors, and more than 7,000 trailers. Privately held by one family since its inception in 1932, NFI operates more than 21 million square feet of contract and public warehouse and distribution space, and generates \$1 billion in revenue annually. NFI is an EPA Smartway Transport and WasteWise Partner and is dedicated to increasing energy efficiency and reducing the impact of the freight industry upon the environment.





Toll Global Forwarding • www.tollgroup.com

Toll Global Forwarding (TGF) provides a full range of international freight forwarding and advanced supply chain management solutions to the international trade community. Our services are tailored to meet our customers' needs for imports, exports, and project logistics. We have the capability and experience to move your goods from the point of procurement, worldwide to any nominated export or import destination. TGF offers door-to-door services via air and ocean, as well as integrated distribution, transload, drayage, and line-haul transportation services. Toll Global Forwarding is a division of the Toll Group, the Asia Pacific's leading provider of integrated supply chain solutions.

Turkish Cargo • www.turkishcargo.com

Turkish Cargo offers safe, fast, and reliable air cargo service for a wide variety of product lines, from textiles to plastics, machines to aircraft parts, consolidated cargos to electronic materials. Turkish Cargo's service network covers almost the entire globe from the Americas to the Middle East, and from Europe to Africa. Make Turkish Cargo your air cargo partner in carrying your business to the world.



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ASSOCIATIONS



American Society of Transportation & Logistics • www.astl.org

The American Society of Transportation and Logistics (ASTL) provides a career pathway of lifelong learning for professionals in the transportation logistics industry. Earn your industry credential as a GLA, PLS, CTL or DLP and an opportunity to connect with colleagues around the world. ASTL provides state-of-the-art knowledge for developing practical answers to today's transportation and logistics challenges.

BULK: LIQUID-DRY

Lynden • www.lynden.com

Over land, on the water, in the air – or in any combination – Lynden has been helping customers solve transportation problems for almost a century. Operating in such challenging areas as Alaska, Western Canada and Russia, as well as other areas around the globe, Lynden has built a reputation of superior service to diverse industries.



CHEMICAL LOGISTICS



Lynden • www.lynden.com

Over land, on the water, in the air – or in any combination – Lynden has been helping customers solve transportation problems for almost a century. Operating in such challenging areas as Alaska, Western Canada and Russia, as well as other areas around the globe, Lynden has built a reputation of superior service to diverse industries.

COLD STORAGE

CrowleyFresh • www.crowleyfresh.com

If you think Crowley offers just ocean freight services, think again. Sure, it provides liner shipping and cargo carrier services throughout Latin America, Puerto Rico, and the Caribbean Basin, employing the latest vessels, equipment, and communication technologies. But Crowley is also one of the most diversified transportation companies in the world, developing innovative supply chain solutions backed by deep relationships throughout the region, far-reaching resources, and an impeccable reputation worldwide. With its extensive shipping capacity, as well as thousands of containers, trailers, and other intermodal components, Crowley ensures the reliability of every link in your supply chain.





CONSULTANTS



LTD Management • www.ltdmgmt.com

Do you control your supply chain? Or does your supply chain control you? Whether a startup, turnaround, e-commerce, or whatever the need, LTD Management can work with you to reduce costs, improve operation results, increase inventory turns, execute and manage outsourcing, implement lean logistics, enhance supplier performance, and segment your supply chain to gain advantage. Bottom line—successfully manage your supply chain.

New Breed • www.newbreed.com

Logistics network design and lead logistics services help manage your supply chain. No amount of operational efficiency can make up for faulty strategy or a cumbersome process. That's why New Breed invests in logistics technology tools and intellectual resources to determine the best way to run your operation with fewer people, reduced inventory levels, in less time, and with lower cost.





NFI • www.nfiindustries.com

NFI is a fully integrated supply chain management provider offering logistics, distribution, warehousing, intermodal, global, commercial real estate, consulting, transportation brokerage, and solar services across the U.S. and Canada. NFI owns facilities nationwide and globally, more than 2,000 tractors, and more than 7,000 trailers. Privately held by one family since its inception in 1932, NFI operates more than 21 million square feet of contract and public warehouse and distribution space, and generates \$1 billion in revenue annually. NFI is an EPA Smartway Transport and WasteWise Partner and is dedicated to increasing energy efficiency and reducing the impact of the freight industry upon the environment.

The Progress Group, LLC • www.theprogressgroup.com

Experience, creative insight, analytical thinking, common sense. Are you looking for help to lower logistics costs, improve the performance of your supply chain, or redesign your warehouse? Does your productivity improvement approach need some energy? Or perhaps you are searching for ways to service your customers better? The Progress Group has been delivering consulting excellence in these areas since 1991. We will partner with your team to define the right direction and apply sound implementation skills to bring the plan to reality. We make positive change happen.



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TransWorks • www.trnswrks.com

TransWorks offers fully integrated TMS/Supply Chain Execution solutions that enhance and automate transportation processes. Without the requirement for capital investment, we offer customers an affordable way to manage transportation costs by allowing them to utilize the best transportation execution tools. TransWorks has consistently automated processes that enable our customers to communicate more effectively with their vendors and customers. We accomplish this by leveraging technology that seamlessly integrates into our customers' business processes.

CUSTOM BROKERS

Customized Brokers - A Crowley Company • www.customizedbrokers.net

If you think Crowley offers just ocean freight services, think again. Sure, it provides liner shipping and cargo carrier services throughout Latin America, Puerto Rico, and the Caribbean Basin, employing the latest vessels, equipment, and communication technologies. But Crowley is also one of the most diversified transportation companies in the world, developing innovative supply chain solutions backed by deep relationships throughout the region, far-reaching resources, and an impeccable reputation worldwide. With its extensive shipping capacity, as well as thousands of containers, trailers, and other intermodal components, Crowley ensures the reliability of every link in your supply chain.





Global Link Logistics • www.globallinklogistics.com

Global Link Brokerage Services is a full-service clearing house with licensed brokers to ensure consistent, quality service. In addition to processing documents for clearance, our knowledgeable staff assists with customs compliance issues, other government agencies, and provides information on C-TPAT certification. We work with all government agencies to clear containers as quickly as possible. Our experience is your advantage.

CUSTOMS COMPLIANCE / DUTY DRAWBACK

Integration Point • www.integrationpoint.com

Integration Point provides import/export capabilities, regulatory information for 140-plus countries, and connectivity to supply chain partners and government agencies around the world. Built on a single, Web-based platform, Integration Point allows organizations to secure their supply chains and comply with global regulatory requirements while improving visibility and realizing savings.







NFI • www.nfiindustries.com

NFI is a fully integrated supply chain management provider offering logistics, distribution, warehousing, intermodal, global, commercial real estate, consulting, transportation brokerage, and solar services across the U.S. and Canada. NFI owns facilities nationwide and globally, more than 2,000 tractors, and more than 7,000 trailers. Privately held by one family since its inception in 1932, NFI operates more than 21 million square feet of contract and public warehouse and distribution space, and generates \$1 billion in revenue annually. NFI is an EPA Smartway Transport and WasteWise Partner and is dedicated to increasing energy efficiency and reducing the impact of the freight industry upon the environment.

DEDICATED CONTRACT CARRIAGE

AAA Cooper Transportation • www.aaacooper.com

AAA Cooper Transportation has been delivering safe, efficient transportation for more than 50 years. With strategically located service centers, we are prepared to give individual attention to your shipping needs. AAA Cooper Transportation is dedicated to the long-term sustainability of the environment, and continues to implement processes that will make the world a better place to live for generations to come.



DISTANCE LEARNING



$\textbf{Institute of Logistical Management} \bullet \textbf{www.logisticseducation.edu}$

ILM offers quality, cost-effective, self-paced Professional Certifications in Transportation, Logistics, and Supply Chain for students to achieve competency in the logistics industry. ILM integrates transportation, logistics, and supply chain to certify professionals for "real-world" application. Now offering 8 Certifications. For further information, contact us at 888-456-4600 or info@logisticseducation.edu.

DISTRIBUTION CENTER MANAGEMENT

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ECONOMIC DEVELOPMENT



Ameren Corporation • www.ameren.com

St. Louis-based Ameren Corporation is a Fortune 500 company dedicated to generating electricity, delivering electricity, and distributing natural gas to 3.2 million customers throughout Illinois, mid-Missouri, and the St. Louis Metropolitan Area. Ameren's professional development team serves as a complete source for business assistance services. For more information, visit Ameren's Web site: www.ameren.com.

Columbus Region • columbusregion.com

The Columbus Region-Columbus Logistics Council focuses on the growth of the region's industry in its eight counties of the broader Columbus 2020! growth strategy. The Columbus Region is your channel to the global marketplace. Through truck, rail, air, and port, the Columbus Region logistics infrastructure gets your freight where it needs to be, when it needs to be there. For more information, contact 614-225-6903.





Hoosier Energy • www.hepn.com

Hoosier Energy is a generation and transmission cooperative providing electric power to 17 member electric distribution cooperatives in central and southern Indiana and one member cooperative in Illinois. Based in Bloomington, Ind., Hoosier Energy operates coal, natural gas, and renewable energy power plants and delivers power through a 1,450-mile transmission network. Hoosier Energy is a Touchstone Energy Cooperative, one member of a nationwide alliance of electric co-ops providing high standards of service according to four core values: integrity, accountability, innovation, and commitment to community.

Kentucky Cabinet for Economic Development • www.thinkkentucky.com

Many of the world's most successful companies have discovered that Kentucky, land of the thoroughbred, is a great place to build their business. Kentucky is home to not one, but two air cargo hubs, ranking the state third in the nation in total cargo. Kentucky's industrial power costs rank sixth-lowest in the United States, and are over 22 percent less than the national average.







Nebraska Public Power District ● www.nppd.com

One Web site with everything you need to know about doing business in Nebraska. Find valuable information including sites and building availability; community profiles; facts books; population characteristics; labor availability; profit opportunity studies; contact information; and much more. It's the one place to go to find out why doing business in Nebraska is a smart move. Contact Nebraska Public Power District, 800-282-6773 x5541, e-mail econdev@nppd.com, or visit the Web site.

EDUCATION

American Society of Transportation & Logistics • www.astl.org

The American Society of Transportation and Logistics (ASTL) provides a career pathway of lifelong learning for professionals in the transportation logistics industry. Earn your industry credential as a GLA, PLS, CTL or DLP and an opportunity to connect with colleagues around the world. ASTL provides state-of-the-art knowledge for developing practical answers to today's transportation and logistics challenges.





Baruch College Division of Continuing and Professional Studies www.baruch.cuny.edu/caps

Trade globally...learn locally! Baruch College's Weissman Center for International Business and Division of Continuing and Professional Studies (CAPS) runs 45+ practical courses and 7 rigorous certificate programs to develop and advance your international trade career. We offer Customs Broker License Test Preparation, Import and Export Operations, Logistics, Supply Chain Management, International Entrepreneurship, NASBITE-endorsed Certified Global Business Professional test preparation, and more. Earn NCBFAA-approved CEUs in 13 courses and 10 seminars. Taught by industry experts on our NYC campus, NJ port area, onsite, and online.

Cal State Fullerton, Extended Education http://extension.fullerton.edu/professionaldevelopment

A Supply Chain Management certificate is an opportunity to learn how to effectively and efficiently manage the activities of the supply chain and prepare yourself for an in-demand career. While you're learning to improve profits, you're learning new skills to improve your career goals. The certificate consists of six required courses totaling 120 hours of lecture, discussion, projects, and interactive exercises. Students not pursuing a certificate are welcome to take selected courses individually.



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Governors State University • www.govst.edu/cbpa

Governors State University's College of Business and Public Administration provides an accessible, high-quality education to a diverse student body primarily from the Chicago area, while actively engaging in research and service to the community. The university's MBA with a supply chain management concentration provides tomorrow's executives with the strong business foundation needed to compete in a global market.

International Import-Export Institute at Dunlap-Stone http://iiei.dunlap-stone.edu

The tempo of trade has increased globally and the demand for qualified professionals with proven skills and knowledge is on the rise. Since 1995, IIEI at Dunlap-Stone University has been a global leader, providing practical, in-demand education and training. Individuals seeking professional significant degrees and certifications with an emphasis in international trade and logistics, call an advisor today at 800-474-8013.





Syracuse University, Whitman School of Management www.whitman.syr.edu

The Whitman School of Management at Syracuse University, a nationally recognized leader in logistics and supply chain education and research since 1920, offers the oldest such program in the country. Whitman supply chain graduates gain professional experience as students and enjoy a strong alumni network. For practitioners, we offer a talented intern/employee pool, and events to renew and update your skills. We also offer BS, MBA, MS, PhD, and executive programs in supply chain, as well as electives in Whitman's highly-regarded distance-learning MBA option.

University of Alaska Anchorage • http://logistics.alaska.edu

The Department of Logistics at the University of Alaska Anchorage offers a Master of Science in Global Supply Chain Management (30 credits, 20 months, emphasis on strategy, leadership, knowledge management, and international business practices). Also offered are: a BBA in Global Logistics and Supply Chain Management (4 years); an Associate of Applied Science in Logistics and Supply Chain Operations (2 years); and a Certificate in Logistics and Supply Chain Operations (1 year).







University of Arkansas-SCM Research Center ● scmr.uark.edu

Supply Chain Management at the University of Arkansas offers undergraduate, graduate, and doctoral logistics programs within the Sam M. Walton College of Business. The undergraduate and graduate programs have been ranked among the top 10 public university supply chain programs by *U.S. News and World Report*. With both an outreach center and department dedicated to supply chain management, you will find an array of educational options including conference information, executive education classes, and current research.

University of Denver (ITI) • www.du.edu/transportation

The ITI (Intermodal Transportation Institute) Executive Masters Program at the University of Denver offers a rigorous curriculum and hands-on approach for developing advanced management skills for working professionals in the transportation, supply chain, and logistics industries. This is an 18-month graduate program with five one-week Denver residencies and a travel seminar to an international location. Applications are being accepted for classes beginning in September 2013.





Wright State University • www.wright-masters-Iscm.org

The Master of Science in Logistics and Supply Chain Management provides a rich blend of real-life experience, case material, and rigorous curriculum taught by outstanding faculty and industry experts. This unique one-year program combines four in-person residencies, along with nine online courses and a capstone project allowing you to add financial value to your organization. It won't be an easy 12 months – but the payoff will be worth it! More details can be found at www.wright-masters-lscm-org.

FLEET MANAGEMENT

Cheetah Software Systems • www.cheetah.com

Founded in 1987, Cheetah helps companies get the right products to the right place at the right time, with the best customer service and the lowest cost. Cheetah provides dynamic, optimized routing that continuously adjusts to changing conditions; automated dispatch and customer service; and access to real-time supply chain information across an organization. Customers include Macy's, Ward Trucking, Cardinal Health, FedEx Office, JS Logistics, Central Freight, Exel, Benton Express, and other firms across North America.



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WEB CITE IN THIS SECTION: Fleet Mgmt. – Forwarders/Brokers



NFI • www.nfiindustries.com

NFI is a fully integrated supply chain management provider offering logistics, distribution, warehousing, intermodal, global, commercial real estate, consulting, transportation brokerage, and solar services across the U.S. and Canada. NFI owns facilities nationwide and globally, more than 2,000 tractors, and more than 7,000 trailers. Privately held by one family since its inception in 1932, NFI operates more than 21 million square feet of contract and public warehouse and distribution space, and generates \$1 billion in revenue annually. NFI is an EPA Smartway Transport and WasteWise Partner and is dedicated to increasing energy efficiency and reducing the impact of the freight industry upon the environment.

TMW Systems, Inc. • www.tmwsystems.com

TMS solutions from the company that drives ground transportation in North America. Extensible, enterprise-ready software for companies that manage or provide transportation services – from logistics service providers and manufacturers to private and dedicated fleets to bulk carriers, LTLs, truckload carriers, and non-asset-based freight brokers. Make operations more agile and more profitable with transportation management software from TMW Systems.



FORKLIFTS



Yale • www.yale.com

As a leader in materials handling, Yale offers more than just the most complete line of lift trucks. All its lift trucks come with the support of an entire company, a strategically located dealer network, service technicians, and everything needed to finance and manage your lift truck fleet. Yale manufactures and distributes a full line of products in Class I electric rider trucks; Class II narrow aisle trucks; Class III motorized hand trucks; Class IV cushion tire trucks; and Class V pneumatic tire trucks. Product line offerings can vary by region, so check the product section of the Web site covering your area: North America, Latin America, Europe/Middle East/Africa, or Asia-Pacific.

FREIGHT FORWARDERS/BROKERS

A.N. Deringer, Inc. • www.anderinger.com

Customer care, service excellence, and a firm commitment to customs compliance illustrate the differences that have led to Deringer's success as a leading logistics provider for more than 90 years. Deringer's turnkey logistics services include customs brokerage, international freight forwarding, warehousing and distribution, cargo insurance, and consulting. With more than 30 offices and a strong network of international agents, Deringer helps companies optimize efficiencies in their supply chain.







Crowley Project Logistics & Global Freight Management http://www.crowley.com/what-we-do/project-logistics-and-Global-Freight-Management/overview

If you think Crowley offers just ocean freight services, think again. Sure, it provides liner shipping and cargo carrier services throughout Latin America, Puerto Rico, and the Caribbean Basin, employing the latest vessels, equipment, and communication technologies. But Crowley is also one of the most diversified transportation companies in the world, developing innovative supply chain solutions backed by deep relationships throughout the region, far-reaching resources, and an impeccable reputation worldwide. With its extensive shipping capacity, as well as thousands of containers, trailers, and other intermodal components, Crowley ensures the reliability of every link in your supply chain.

Lynden • www.lynden.com

Over land, on the water, in the air – or in any combination – Lynden has been helping customers solve transportation problems for almost a century. Operating in such challenging areas as Alaska, Western Canada and Russia, as well as other areas around the globe, Lynden has built a reputation of superior service to diverse industries.





Pilot Freight Services • www.pilotdelivers.com

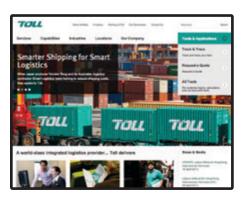
Pilot Freight Services is a full-service transportation and logistics company with more than 75 locations throughout North America and a worldwide network of overseas agents, offering global coverage in more than 190 countries. As your transportation and logistics experts, we equip you with everything you need to move your cargo, delivering your shipments by air, land, and sea, anywhere in the world. To learn more, contact our 24/7 Customer Service Center at 1-800-HI-PILOT.

SBA Global Logistic Services • www.sbaglobal.com

With terminals across the United States, partner offices in every country and major city worldwide, and an affiliate customs broker and ocean division (SBA Consolidators, Inc.), SBA is ready to fulfill all of your shipping and logistics needs. Our award-winning web site, sbaglobal.com, is easy to navigate and filled with useful information to help make your shipping experience as smooth as possible.



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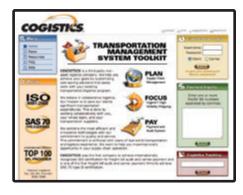
Toll Global Forwarding • www.tollgroup.com

Toll Global Forwarding (TGF) provides a full range of international freight forwarding and advanced supply chain management solutions to the international trade community. Our services are tailored to meet our customers' needs for imports, exports, and project logistics. We have the capability and experience to move your goods from the point of procurement, worldwide to any nominated export or import destination. TGF offers door-to-door services via air and ocean, as well as integrated distribution, transload, drayage, and line-haul transportation services. Toll Global Forwarding is a division of the Toll Group, the Asia Pacific's leading provider of integrated supply chain solutions.

FREIGHT PAYMENT/AUDIT SERVICES

COGISTICS • www.cogistics.com

COGISTICS is the choice for reducing your transportation spend. We have spent the last two decades listening to our customers and building solutions designed to help them beat their objectives - whether it's a Fortune 500 company or a medium-sized business. The COGISTICS Freight Bill Pre-audit and Payment system can be integrated into customer-specific processes - whether it is building a Transportation Data Warehouse, creating a state-of-the-art Business Intelligence Tool, or collaborating with our customers to effectively and efficiently manage their transportation. COGISTICS Transportation (wholly owned sub) offers Supply Chain Transportation Management services utilizing our world-class TMS. This program will be created collaboratively and meet your specific requirements. Customer satisfaction is our priority. Call to learn more: 863-647-9389, ask for Jeff.





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TransportGistics • www.transportgistics.com

TransportGistics is a global, multi-product and services company that provides market-leading, simple, incremental solutions for transportation management and logistics functions within the supply chain. Our Web-based solutions enable our customers to source, procure, and execute transportation services; enable collaboration; reduce costs; improve processes; identify hidden costs of transportation; improve vendor compliance routing guides; improve Supplier Relationship Management; monitor vendor performance; improve shipment visibility; generate automatic, status-driven alerts; and monitor carrier performance with respect to time in transit, service failure, and billing.







TranzAct Technologies, Inc. • www.tranzact.com

TranzAct Technologies, Inc. helps shippers reduce their transportation spend while providing the tools necessary to remain in control and focus on business development, not task management. You can make better business decisions on an ongoing basis with our solutions, which include accurate and timely freight audit and payment; flexible, Web-based reporting and TMS applications; and carrier contract negotiation and consulting that deliver sustainable results.

FULFILLMENT

3LINX • www.3linx.com

3LINX will warehouse your inventory in secure and insured distribution centers, and fulfill orders in a manner where every shipped box speaks as highly as your brand. 3LINX pays attention to the little things so that your customers feel like theirs was the only order packed. Service features include: free receiving (count verification, damage reporting), one-business-day or same-day fulfillment turnaround, pick-and-pack fulfillment, branded packing slips returns processing, and much more.





Distribution Management Inc. • www.dmifulfillment.com

Distribution Management delivers one-day and two-day ground shipping to 98 percent of the U.S. population from its distribution centers in Dallas, Texas; Fresno, Calif.; St. Louis, Mo.; and Carlisle, Pa. We offer same-day fulfillment and late-order cutoff. With low startup costs and integration to e-commerce platforms, Distribution Management Inc. can store, pick, pack and ship products without mistakes. We can fulfill your orders and manage returns efficiently through our use of technology and automation. DMI will promote your brand with customized packaging, print to order inserts, and your logo on the packing slip and label.

KNAPP Logistics Automation, Inc. • www.knapp.com

KNAPP Logistics Automation, Inc. is a leading global provider of automated warehouse solutions and warehouse logistics software. Our superior product technology, extensive global experience, and exceptional design capabilities enable our customers to dramatically improve their warehouse and distribution center operations. For manual picking solutions or fully-automatic all-in-one solutions, let KNAPP help you profit from the technologies of tomorrow, today!



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New Breed ● www.newbreed.com

New Breed provides e-fulfillment networks that integrate your Web site to an intelligent fulfillment infrastructure, including a contact center and distribution centers. We can help you reduce costs and improve reliability of your fulfillment operations with real-time inventory and order statuses, electronic integration into parcel tracking with all leading carriers, intelligent sourcing from multiple locations, and order fulfillment to engineered labor standards. We also provide returned goods management including inspections, repairs, and restocking.

NFI ● www.nfiindustries.com

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Wagner Logistics • www.wagnerlogistics.com

Wagner Logistics is not just a trucking company, warehousing company, or any other narrowly defined organization. We're a third-party logistical services company with multiple competencies to provide diverse services for our many customers across the United States. We provide contract trucking and transportation management, distribution centers, warehousing centers, packaging and assembly operations, and fulfillment. Plus, all services are provided with the highest standards of quality and the most technologically advanced information management systems. With our many areas of expertise, we can tailor a supply chain solution for your company to provide you with superb service while lowering your net cost.

GLOBAL LOGISTICS

Werner Enterprises, Inc. ● www.werner.com

Werner Enterprises, Inc. was founded in 1956 and is a premier transportation and logistics company with coverage throughout North America, Asia, Europe, South America, Africa, and Australia. Werner maintains its global headquarters in Omaha, Neb., and maintains offices in the United States, Canada, Mexico, China, and Australia. Werner is among the five largest truckload carriers in the United States, with a diversified portfolio of transportation services that includes dedicated van, temperature-controlled and flatbed; medium-to-long-haul, regional and local van; and expedited services. Werner's Value Added Services portfolio includes freight management, truck brokerage, intermodal and international services.





GLOBAL TRADE



Agility • www.agilitylogistics.com

Let Agility manage the details of your international transportation. Choose from an array of highly configurable air and sea freight options, and road freight services that span Europe, the Middle East, North Africa, and Central Asia with more than 1,000 scheduled, weekly departures. Agility offers global expertise in commodity classifications, and local government rules and regulations, to ensure rapid clearance of your products through Customs.

eCustoms (Visual Compliance) • www.ecustoms.com

Our solutions and services span the spectrum of trade compliance: import documentation and ABI submissions (ABI certified and ACH capable), NAFTA certificates, export documentation (AES certified), Denied Party Screening, DDTC/BIS Export License applications/management, tariff classifications, and new initiatives such as ACE (Automated Commercial Environment), and ACI (Advance Commercial Information) eManifest programs for highway carriers into the United States and Canada, respectively.





QuestaWeb, Inc. • http://questaweb.com/sIn-difference.aspx

QuestaWeb is a premier provider of integrated, Web-based global trade management software. QuestaWeb's applications unify import, export, logistics, compliance, and financial processes under one roof. The applications include U.S. Customs, self-entry, foreign trade zone, landed costs, HTS, PO management, export licensing, drawback, reconciliation, denied party screening, product catalog, tracking, and international document repository. The centralized global database maintains up-to-date trade content and currencies. QuestaWeb can also be efficiently integrated to your ERP system if designated.

UniGroup Logistics • www.unigrouplogistics.com

Managing a supply chain is complex. And your business is unique. Let UniGroup Logistics design a solution tailored to your needs. We'll show you the way to a more efficient logistics solution. UniGroup Logistics is a new name, but the foundation of the company is well-established. It is built on the heritage of United Van Lines and Mayflower Transit, trusted providers of reliable specialized transportation and logistics services for more than 50 years. Based on a network of 1,300 service centers in 146 countries, we are a single source for customized supply-chain solutions. Whether your supply chain is domestic or international, UniGroup Logistics manages a global network of resources to show you the way to seamless, dependable and efficient solutions.



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LOGISTICS IT



Aankhen Inc. • www.aankhen.com

Do you really know what happens in your supply chain? Aankhen's innovative cloud-based visibility solutions enable you to see your supply chain in operation, exposing opportunities and providing a fact-based approach for improvement. Leverage your investments in ERP, TMS, WMS, EDI and B2B, and take them to the next level with automated and accurate M2M data captured by SeeTrak®. The new source of real-time data, events, and intelligence from SeeTrak® will provide new supply chain functionality not possible before. Our pioneering experience, track record of innovation, and knowledge of what works and what does not can save you time and money in getting it right the first time. Try it and see for yourself, with no risk or software installations.

Acuitive Solutions • www.acuitivesolutions.com

Acuitive Solutions' work-process tools and solutions serve leading companies in the home center, premium fashion, specialty and direct retail, home and office décor, and apparel markets. Global TMS ... It's everything we do. Winner: 2011 Supply Chain Distinction Award - Best Collaborative Practice category, and finalist: 2011 Supply Chain Innovation of the Year Award.





Aljex Software Inc. • www.aljex.com

Aljex has an innovative Web-based software for carriers, freight brokers, and intermodal specialists. If you see a demo of our software, you will want it. Why? You will see how Aljex can easily double the number of shipments you can handle. It's so easy to learn that we include unlimited training and support. With Aljex, there is no long, painful switchover. In 48 hours, we can have you trained, linked into the load boards, have your logo on your forms, your users set up, your carriers and customers imported, and ready to work.

Amber Road ● www.amberroad.com

Amber Road is the world's leading provider of on-demand Global Trade Management (GTM) solutions. By helping organizations plan, execute, and track global shipments, Amber Road enables goods to flow unimpeded across international borders in the most efficient, compliant, and profitable way. Our solutions automate import and export processes; provide order and shipment-level visibility; calculate duties, taxes, and fees; administer preferential trade programs; ensure regulatory compliance; and simplify the transportation of goods across international borders.







Andlor Logistics Systems • www.andlor.com

The Andlor staff has partnered with the logistics industry for more than 30 years. The software is a fully integrated 3PL WMS. The Web front-end provides access for the total supply chain. Users enter orders and appointments, and access receipts, shipments, invoices, claims, EDI data, and client and VMI inventories with scheduled reporting. Andlor offers BacTracs for reverse logistics processing and a yard management system (YMS). Excellent functionality and support are Andlor's trademarks.

Cardinal Hosted Logistics • www.cardinalhostedlogistics.com

Cardinal Hosted LogisticsTM, a division of Cardinal Logistics Management Corporation, provides integrated technology solutions customized for each client. Created with real operations in mind, our user-friendly and flexible suite of solutions allows customers to select the applications most important to their businesses. Cardinal Hosted Logistics' offerings include: fleet, warehouse and order management solutions; integrated voice technologies; routing and scheduling; and handhelds with status updates, signature capture, scanning capabilities, and more. Visit us at www.cardinalhostedlogistics.com





CargoApps.com • www.cargoapps.com

At CargoApps.com we take all the hassle out of building a mobile app. No website programming skills or IT background required. Just sign up, fill out our questionnaire, and let us deploy your app to the App Store for you. CargoApps.com is the most cost-efficient way to get a mobile app designed and deployed for your logistics business.

CargoSmart • www.cargosmart.com

CargoSmart is a Software-as-a-Service (SaaS) global shipping and logistics solutions provider that enables shippers, consignees, and logistics service providers to lower transportation management costs, streamline operations, and reduce the risk of late shipments. Award-winning applications include visibility, documentation, carrier contract management, compliance, and process management solutions. Visit CargoSmart's website to download product information sheets and request a demo.



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Cass Information Systems, Inc. ● www.cassinfo.com

Cass is the nation's oldest and largest provider of freight bill payment, audit, and rating services. We offer a wide array of services for processing and paying freight bills, as well as our industry-leading Internet reporting service, CassPort. In business since 1906 and providing freight payment services since 1956, Cass continues to offer stability, security, and expertise in the freight audit, payment, and information market.

Cheetah Software Systems • www.cheetah.com

Founded in 1987, Cheetah helps companies get the right products to the right place at the right time, with the best customer service and the lowest cost. Cheetah provides dynamic, optimized routing that continuously adjusts to changing conditions; automated dispatch and customer service; and access to real-time supply chain information across an organization. Customers include Macy's, Ward Trucking, Cardinal Health, FedEx Office, JS Logistics, Central Freight, Exel, Benton Express, and other firms across North America.





CT Logistics • www.ctlogistics.com

CT Logistics can help you save money , no matter your company's size. For small- and medium-sized shippers, CT Logistics offers its TranSaver shipper cooperative buying program. Larger shippers can simplify their freight spending with CT Logistics' exclusive FreitRater freight bill rating and processing system. And businesses of all sizes can benefit from AuditPay freight payment services. Add to these offerings a wealth of online collaboration and reporting tools, and it's easy to see why shippers have trusted CT Logistics with their freight payment needs for more than 90 years.

CTSI-Global • www.ctsi-global.com

For more than 50 years, CTSI-Global has been a valuable resource to companies by providing the technology and industry expertise to help them manage all aspects of their supply chain-physical, informational, and financial-through freight audit and payment, transportation management systems (TMS), information management tools, and global consulting. The end results are improved shipping efficiencies, greater control, and significant ongoing savings. CTSI-Global is your link to supply chain solutions.







Data2Logistics • www.data2logistics.com

Data2Logistics provides the business intelligence you need to reduce transportation expense by 7 percent to 15 percent, and improve control for your freight and parcel shipments. For more than four decades, clients have relied on Data2Logistics to provide accurate pre-audit, post-audit, freight cost allocation, and robust global information. These services are provided as part of our worldwide freight bill payment capabilities. We process bills for all modes of transportation, including less-than-truckload, truckload, air, ocean, and parcel. We are a recognized source for actionable information, not just access to data. Data2Logistics has the experienced staff and global presence to service your locations in North America and around the world.

Echo Global Logistics • www.echo.com

Echo Global Logistics, a results-oriented transportation management firm, provides superior cost-savings technology and services for small enterprises to the Fortune 100. Echo's transportation management solution delivers cost savings through proprietary access to unparalleled transportation market data, custom-built world-class technology, a massive nationwide network of carriers, and the negotiating power resulting from massive spend on behalf of clients. Echo's focus is on offering concrete, tangible savings to all clients, and ensuring increased service levels that derive from the Six Sigma process integrity on which Echo's transactional engine has been built.





MagicLogic Optimization • www.magiclogic.com

MagicLogic's Cube-IQ software represents the state-of-the-art in load planning software. It is built around the best loading engine on the market and will give you optimal volume/weight utilization. Cube-IQ comes with its own database, data import/export, 3D load diagrams, and reporting. MagicLogic also offers the Cube-IQ BlackBox for integration into other software and Web sites. All versions have built-in modes of operation for container, truck, rail car, and ULD loading, palletization, and cartonization.

Manhattan Associates ● www.manh.com

For 23 years, Manhattan Associates has provided global supply chain excellence to organizations that consider supply chain software, processes and technology strategic to market leadership. The company's platform-based supply chain software portfolios-Manhattan SCOPE®, Manhattan SCALE™ and Manhattan Carrier™-are designed to deliver both business agility and total cost of ownership advantages and are used by 1,200 companies globally.



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Navegate • www.navegate.com

Are you ever concerned that your global visibility and supply chain visibility is dependent on one provider? With Navegate, you maintain your own global management solution and have the freedom to plug in and change providers to ensure you have the best pricing and service across your entire supply chain. Navegate's supply chain visibility is an integrated solution that gives you true line-item visibility and carrier updates. Real-time visibility and carrier management significantly reduces your costs and ensures better purchasing decisions.

New Breed ● www.newbreed.com

New Breed provides application hosting and information services that power supply chain networks. Our Internet-based solutions enable our clients to integrate operating facilities, Web sites, customers, suppliers, carriers, and existing systems to streamline and optimize their network. Collaborating with the best technology providers in the world, we offer application-hosting services utilizing a configurable, pre-integrated technology infrastructure that supports supply chain networks from end to end.





noax Technologies • www.noax.com

noax Technologies, a leading manufacturer of rugged and reliable industrial PCs, designs and develops hardware solutions for extremely harsh, as well as sensitive environments, where hygiene is a major factor. Our products are designed to function smoothly and continuously around the clock in the harshest industrial environments for many years. They have also proven their resistance to extreme conditions such as heat, cold, moisture, dust, shock, acids, and detergents. Let noax Technologies help devise a solution for your industrial PC needs.

nVision Global Technology Solutions, Inc. • www.nvisionglobal.com

nVision Global Technology Solutions, Inc. is a leading international freight audit, payment, and logistics management solutions provider. With locations in North America, Europe, and Asia, our staff is fluent in over 25 languages, and processes and pays freight invoices from over 190 countries worldwide. Over the years, our customers have come to rely on our prompt, accurate Sarbanes-Oxley-compliant freight payment services, as well as our leading-edge information management analytical tools including global mapping, graphing, benchmarking, modeling, and network optimization analysis to help them manage their overall supply chain costs.







Paradox Software Consulting • www.paradoxsci.com

Paradox Software Consulting offers software tools and consulting services to plan and execute logistics and supply chain management functions of any-size trucking or logistics company. For over 15 years, we have been offering tools for logistics planning in the areas of vehicle routing and scheduling, continuous move planning, fleet sizing, and resource scheduling. For supply chain planning, we provide tools for network design and fulfillment planning. Call 855-472-7236, visit www.paradoxsci.com or email info@paradoxsci.com for more information.

SmartFreightWare • www.smartfreightware.com

SmartFreightWare® is the unique culmination of shipping experts and IT professionals. Together, we bring relevant solutions to our clients' businesses that are flexible, scalable, and cost-effective. If you feel like you're paying too much for transportation, and you spend too much of your valuable time doing administrative tasks, SmartFreightWare has the solution.





Suntek Systems Inc. • www.ilogisys.com

Suntek provides its logistics management software, iLogisys, to freight forwarders, NVOCCs, 3PLs, and customs brokers. As the company's flagship solution, iLogisys offers simple and efficient methods of logistics operation, collaboration tools between related parties, extensive supply chain visibility, B2B EDI connectivity, and more control over business management. The cost-effective and feature-rich iLogisys products boost your customer satisfaction, and increase sales opportunities for business growth.

TMW Systems, Inc. • www.tmwsystems.com

TMS solutions from the company that drives ground transportation in North America. Extensible, enterprise-ready software for companies that manage or provide transportation services – from logistics service providers and manufacturers to private and dedicated fleets to bulk carriers, LTLs, truckload carriers and non-asset-based freight brokers. Make operations more agile and more profitable with transportation management software from TMW Systems.



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TransportGistics • www.transportgistics.com

TransportGistics is a global, multi-product and services company that provides market-leading, simple, incremental solutions for transportation management and logistics functions within the supply chain. Our Web-based solutions enable our customers to source, procure, and execute transportation services; enable collaboration; reduce costs; improve processes; identify hidden costs of transportation; improve vendor compliance routing guides; improve Supplier Relationship Management; monitor vendor performance; improve shipment visibility; generate automatic, status-driven alerts; and monitor carrier performance with respect to time in transit, service failure, and billing.

Wolters Kluwer Transport Services • www.transwide.com

Wolters Kluwer Transport Services offers a complete range of TMS solutions for both shippers and carriers, worldwide. The Transwide TMS for Shippers is a modular, on-demand (SaaS) collaboration platform that enables partners in a logistics network to increase transportation performance through optimized planning, execution, visibility, and cost management. With 500+ customers (80,000+ users) in 72 countries across four continents, the Transwide solution suite enables shippers to source, plan, execute, settle, and analyze their transportation with maximum cost efficiency.



MATERIALS HANDLING



Akro-Mils • www.akro-mils.com

Akro-Mils is a leading manufacturer of plastic and metal storage, organization, transport and material handling products designed to improve inventory control and productivity in any setting – including industrial, healthcare, commercial, and consumer. As the industry leader, Akro-Mils strives to continually provide customers with innovative, quality products; unsurpassed customer service; and the fastest, most reliable shipping in the industry.

KNAPP Logistics Automation, Inc. • www.knapp.com

KNAPP Logistics Automation, Inc. is a leading global provider of automated warehouse solutions and warehouse logistics software. Our superior product technology, extensive global experience, and exceptional design capabilities enable our customers to dramatically improve their warehouse and distribution center operations. For manual picking solutions or fully-automatic all-in-one solutions, let KNAPP help you profit from the technologies of tomorrow, today!







Power Automation Systems (PAS) • www.powerautomationsystems.com

Power Automation Systems is a leading innovator of automated warehouse products and solutions. A global company with headquarters and manufacturing in northern California, Power Automation Systems maximizes warehouse effectiveness with the world's most innovative automated warehouse storage solution family, the PowerStor®. The most sustainable option available today, the PowerStor® system optimizes a facility by providing the highest density, highest throughput, and greatest flexibility.

MULTI-MODAL

Lynden • www.lynden.com

Over land, on the water, in the air — or in any combination — Lynden has been helping customers solve transportation problems for almost a century. Operating in such challenging areas as Alaska, Western Canada and Russia, as well as other areas around the globe, Lynden has built a reputation of superior service to diverse industries.



OCEAN/INTERMODAL



Bahri • www.bahri.sa

The National Shipping Company of Saudi Arabia is now Bahri, with new ships and a new look. That means even better breakbulk, ro-ro, and container service between the North American East and Gulf coasts and the Middle East, Mediterranean, and Indian Subcontinent. Bahri continues to offer personalized customer service, regular sailings, competitive rates, and effective intermodal resources. Bahri is reaching toward tomorrow's horizon by connecting economies, sharing prosperity, and driving excellence in global logistics services.

Crowley Liner Services • www.crowley.com/partner

If you think Crowley offers just ocean freight services, think again. Sure, it provides liner shipping and cargo carrier services throughout Latin America, Puerto Rico, and the Caribbean Basin, employing the latest vessels, equipment, and communication technologies. But Crowley is also one of the most diversified transportation companies in the world, developing innovative supply chain solutions backed by deep relationships throughout the region, far-reaching resources, and an impeccable reputation worldwide. With its extensive shipping capacity, as well as thousands of containers, trailers, and other intermodal components, Crowley ensures the reliability of every link in your supply chain.



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Lynden • www.lynden.com

Over land, on the water, in the air – or in any combination – Lynden has been helping customers solve transportation problems for almost a century. Operating in such challenging areas as Alaska, Western Canada and Russia, as well as other areas around the globe, Lynden has built a reputation of superior service to diverse industries.

Toll Global Forwarding • www.tollgroup.com

Toll Global Forwarding (TGF) provides a full range of international freight forwarding and advanced supply chain management solutions to the international trade community. Our services are tailored to meet our customers' needs for imports, exports, and project logistics. We have the capability and experience to move your goods from the point of procurement, worldwide to any nominated export or import destination. TGF offers door-to-door services via air and ocean, as well as integrated distribution, transload, drayage, and line-haul transportation services. Toll Global Forwarding is a division of the Toll Group, the Asia Pacific's leading provider of integrated supply chain solutions.



PALLETS



PECO Pallet • www.pecopallet.com

PECO Pallet is a North American leader in pallet rental services with an outstanding reputation for quality, service, and sustainability. Leading consumer goods manufacturers utilize PECO's sturdy red wood block pallets to ship their products to over 95 percent of U.S. grocery, warehouse, and discount retailers. PECO Pallet is headquartered in New York and maintains over 500 service centers and manufacturing plants throughout the U.S., Mexico, and Canada. For more information about PECO Pallet, visit www.pecopallet.com

PORTS

Port of Palm Beach • www.portofpalmbeach.com

The Port of Palm Beach is a 162-acre full-service, diversified landlord port. The only port in South Florida with on-dock rail, we are an important distribution center for commodities being shipped to the Caribbean Basin and globally. Operations include containerized, dry-bulk, liquid-bulk, break-bulk, roll-on/roll-off, and heavy-lift/project cargoes. PortofPalmBeach.com will be launching a complete Website redesign in the summer of 2013.







Port of Stockton • www.portofstockton.com

Introducing Stockton Quotes PORTal – which provides non-containerized cargo with one-stop, online transportation services quotes. This is a convenient, single location online where you can request quotes for various transportation services related to your shipment. The Port of Stockton has developed this rate system as a valued-added service for shippers who import and export non-containerized cargo. Get started today! Go to: www.portofstockton.com. Click on Tariffs/Rate Quote, then click on Rate Quote, and register. One Port - One Stop - All Your Rate Answers.

PROJECT LOGISTICS

Crowley Project Logistics & Global Freight Management www.crowley.com/what-we-do/project-logistics-and-Global-Freight-Management/overview

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RAIL/INTERMODAL

NFI • www.nfiindustries.com

NFI is a fully integrated supply chain management provider offering logistics, distribution, warehousing, intermodal, global, commercial real estate, consulting, transportation brokerage, and solar services across the U.S. and Canada. NFI owns facilities nationwide and globally, more than 2,000 tractors, and more than 7,000 trailers. Privately held by one family since its inception in 1932, NFI operates more than 21 million square feet of contract and public warehouse and distribution space, and generates \$1 billion in revenue annually. NFI is an EPA Smartway Transport and WasteWise Partner and is dedicated to increasing energy efficiency and reducing the impact of the freight industry upon the environment.



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Railinc • www.railinc.com

Railinc is a leading provider of rail data, IT, and information services to the North American freight rail industry. Our Umler™ and RailSight™ products support critical business processes, and provide data and business intelligence that helps railroads, rail equipment owners, their customers and business partners increase productivity and keep their businesses moving. Railinc is the largest single source for real-time, accurate, interline rail data and rail shipment status information.

RAPID RESPONSE LOGISTICS

Lynden • www.lynden.com

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New Breed • www.newbreed.com

New Breed's service parts management solution enables rapid delivery of critical parts. We have been managing large, complex service parts management solutions since 1980. We have the existing parts depot network, processes, and systems to quickly implement cost-saving solutions. New Breed provides service parts management in the medical equipment, electronics, and aerospace industries.

REAL ESTATE

Mericle Commercial Real Estate Services ● www.mericle.com

Mericle Commercial Real Estate Services is the largest private developer of industrial space along Pennsylvania's I-81 Corridor. Mericle owns and manages more than 10 million square feet in northeast Pennsylvania, and has more than two million square feet of tax-free logistics space available with 30-foot-plus ceilings, energy-efficient lighting, ESFR fire protection, abundant on-site trailer storage, and immediate interstate access. See www.mericle.com.







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RECRUITING

Ambiance Personnel • www.ambiancepersonnel.com

Ambiance Personnel has been in business for 26 years, comprehensively servicing executive search, permanent placement, and temporary staffing positions exclusively for the international trade, transportation, and logistics industry. Our senior recruiter consultants have many years of extensive, industry-specific experience and knowledge. This expertise and insight give our recruiters the unique advantage and exceptional ability to seek out and identify the finest talent available for all positions within your industry. Ambiance welcomes the opportunity to demonstrate the quality of our recruiting services.





Shey-Harding Associates • www.shey-harding.com

Founded in 1990, Shey-Harding Associates is an executive search firm specializing in transportation, supply chain, logistics, and distribution positions. Our extensive industry experience and client-focused approach helps to ensure fast, efficient results. We provide personalized service tailored to meet your needs. Contact Shey-Harding today at 562-799-8854 or info@shey-harding.com.

REVERSE LOGISTICS

KNAPP Logistics Automation, Inc. • www.knapp.com

KNAPP Logistics Automation, Inc. is a leading global provider of automated warehouse solutions and warehouse logistics software. Our superior product technology, extensive global experience, and exceptional design capabilities enable our customers to dramatically improve their warehouse and distribution center operations. For manual picking solutions or fully-automatic all-in-one solutions, let KNAPP help you profit from the technologies of tomorrow, today!



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New Breed • www.newbreed.com

Reverse logistics is a complex, often overlooked, function that can eat into company profits in a hurry. New Breed drives reverse logistics efficiency through proven process disciplines and information systems that automate the disposition of returned goods. New Breed excels at reverse logistics processes that involve inspection, repair, and remanufacturing. Experience includes B2B and consumer returns. Clients of New Breed reverse logistics, and repair and refurbishment services, include Boeing, Verizon Wireless, Siemens Medical Solutions, Avaya, and Sony Electronics.

NFI • www.nfiindustries.com

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SECURITY: CARGO/FREIGHT & SUPPLY CHAIN



TrakLok Corporation ● www.traklok.com

TrakLok Corporation specializes in transportation security systems for chemical, radiological/nuclear, pharmaceutical, and electronics industries. The TrakLok® system consists of a GeoLok® security device and TrakLog® web interface. The GeoLok is a reusable locking and tracking device that is affixed to the doors of cargo containers or over-the-road trailers. The GeoLok can withstand attempts to access cargo in an unauthorized manner such as through use of prying, cutting, or impact tools, and will communicate a wireless alert in the event of an attempt to access cargo in an unauthorized manner. The TrakLog is a web portal that allows clients to access real-time information on the location and integrity of their cargo.

SHIPPING SOFTWARE

eShipGlobal • www.eshipglobal.com

eShipGlobal is an on-demand Transportation Management Solutions (TMS) provider, offering complete and customizable TMS solutions to manage clients' transportation functions – from sourcing, shipment execution, and visibility to freight audit and payment settlement. Our customers can reduce their freight spend with our solution tailored to their business needs. eShipGlobal's Web-based shipping solution delivers these benefits on desktops, warehouses, and mailrooms of leading companies around the world. The solution focuses on freight management, inbound shipments, and export control custom documentation that provides a solution and service offering like no other in the industry.





SIGNAGE & MARKINGS



ASG Services • www.asgservices.com

ASG Services is a warehouse identification and marking specialist. We manufacture custom warehouse labels and warehouse signs in Atlanta, Ga., while providing fully managed installation services and warehouse striping solutions throughout the United States, controlled centrally from our head office.

SITE SELECTION

MidAmerica Industrial Park • www.maip.com

MidAmerica is logistically well-positioned for manufacturing or distribution centers. From our northeast Oklahoma location in the middle of the nation, many firms use our site as a strategic logistics hub to serve supply chains throughout the central United States. We're Oklahoma's largest industrial park and home to nearly 80 businesses, including many Fortune/Global 500 divisions and foreign-owned companies. In addition to a convenient location between Dallas, Texas, and Kansas City, Mo.; Tulsa, Okla.; and Bentonville/Fayetteville, Ark.; MidAmerica also has available buildings, a skilled workforce, incentives, and remarkably low operating costs.





Regional Growth Partnership • www.rgp.org

The Regional Growth Partnership is a private nonprofit corporation dedicated to fostering local, national, and international economic growth opportunities for Northwest Ohio and Southeast Michigan.

SUPPLY CHAIN EXECUTION

Robocom Systems International Inc. • www.robocom.com

Robocom is a supply chain execution software company with products that range from warehouse management and transportation management to voice picking, labor management, proof of delivery, and asset management. An enterprise transportation system and enterprise resource planning system round out the supply chain execution offering. Robocom's solutions address the needs of business leaders responsible for the day-to-day results in warehousing, distribution, transportation, and trucking operations.



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SUPPLY CHAIN MGMT./OPTIMIZATION



ClearTrack Information Network • www.cleartrack.com/wcc.html

ClearTrack is a supply chain interactive services company enabling the collaboration and management of global, inter-company trade and logistics processes. ClearTrack empowers retail, distribution and manufacturing companies to better manage global sourcing and direct importing activities. Offering interactive supply chain services across 20,000 vendors and 26,000 factories in 55 countries, ClearTrack enables customers to reduce costs, accelerate order flow, and improve partner performance.

INSIGHT, Inc. • www.insightoutsmart.com

INSIGHT, Inc. provides optimization-based supply chain analytics and consulting services to meet today's dynamic business challenges. INSIGHT solves the complex supply chain strategic, tactical, and financial planning management issues of the world's foremost companies, such as ExxonMobil, Nestle, and BASF. Our software and services help firms minimize costs, maximize profits, free up capital, streamline operations, and increase customer service levels.





New Breed • www.newbreed.com

In logistics management, simpler is usually better. Fewer, more automated steps cut time and costs out of your supply chain. But getting to simple takes work. Our experienced professionals work closely with your team to understand your process flows – either across the supply chain or within specific operations – using the most sophisticated analysis tools available, including the full $i2^{TM}$ and LogilityTM suites.

NFI • www.nfiindustries.com

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TEMPORARY STAFFING



Ambiance Personnel • www.ambiancepersonnel.com

Ambiance Personnel has been in business for 26 years, comprehensively servicing executive search, permanent placement, and temporary staffing positions exclusively for the international trade, transportation, and logistics industry. Our senior recruiter consultants have many years of extensive, industry-specific experience and knowledge. This expertise and insight give our recruiters the unique advantage and exceptional ability to seek out and identify the finest talent available for all positions within your industry. Ambiance welcomes the opportunity to demonstrate the quality of our recruiting services.

TMS

3Gtms ● www.3Gtms.com

3Gtms is creating The Next Generation of Transportation Software and was recently formed by the merger of 3Gtms and Transite Technology. The company's 3G Transportation Management Suite includes an advanced TMS, a brokerage system, a standalone rating utility, LTL tariffs, and more. Customer satisfaction is an overarching core value for 3Gtms, with the company's solutions being quick to implement and cost-effective.





Aljex Software Inc. • www.aljex.com

Aljex has an innovative Web-based software for carriers, freight brokers, and intermodal specialists. If you see a demo of our software, you will want it. Why? You will see how Aljex can easily double the number of shipments you can handle. It's so easy to learn that we include unlimited training and support. With Aljex, there is no long, painful switchover. In 48 hours, we can have you trained, linked into the load boards, have your logo on your forms, your users set up, your carriers and customers imported, and ready to work.

ChemLogix, LLC • www.chemlogix.com

ChemLogix, LLC is the leading provider of comprehensive chemical industry logistics management outsourcing and technology services that, together with its supply chain consulting resources, enable its clients to improve performance and drive economic value. ChemLogix is dedicated to solving its customers' most vital logistics challenges by leveraging chemical industry expertise, best-of-breed technology, and a personalized, high-touch approach to deliver measurable, sustainable value. For more information, visit www.chemlogix.com or email information@chemlogix.com.



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CTSI-Global • www.ctsi-global.com

For more than 50 years, CTSI-Global has been a valuable resource to companies by providing the technology and industry expertise to help them manage all aspects of their supply chain–physical, informational, and financial–through freight audit and payment, transportation management systems (TMS), information management tools, and global consulting. The end results are improved shipping efficiencies, greater control, and significant ongoing savings. CTSI-Global is your link to supply chain solutions.

McLeod Software • www.mcleodsoftware.com

McLeod Software is the leader when it comes to transportation management solutions, including our comprehensive Freight Management Solutions (FMS) for shippers. We deliver powerful bidding/procurement, carrier realignment, order consolidation/load optimization, load execution, and spot market capabilities all in one solution. McLeod's FMS reduces freight costs and freight spend, and strengthens the carrier relationship. McLeod Software is dedicated to providing the best software offerings available to the transportation industry.





Navegate • www.navegate.com

Navegate gives you peace of mind that your supply chain is being monitored 24 hours a day. By utilizing our global visibility portal, and combining it with our supply chain experts throughout the world, Navegate gives you the ability to save over 10 percent in your global supply chain. Navegate gives you the service of a freight forwarder, while allowing you to get the best pricing from direct carriers.

TMW Systems • www.tmwsystems.com

TMS solutions from the company that drives ground transportation in North America. Extensible, enterprise-ready software for companies that manage or provide transportation services – from logistics service providers and manufacturers to private and dedicated fleets to bulk carriers, LTLs, truckload carriers and non-asset-based freight brokers. Make operations more agile and more profitable with transportation management software from TMW Systems.







TransportGistics • www.transportgistics.com

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UltraShipTMS • www.ultrashipTMS.com

A respected provider of supply chain management technologies, services and consultation, UltraShipTMS helps Fortune 1000 organizations transform transportation networks from opaque, rigid cost centers to strategic, responsive value drivers. With flexible, affordable Software-as-a-Service (SaaS) delivery, UltraShipTMS provides a single-source solution to automate procure-to-pay functions for in- and out-bound shipping across all modes of transport. Get proven tools for reengineering supply chain processes, clarifying transportation network visibility, improving collaboration, and ensuring accountability.





Wolters Kluwer Transport Services • www.transwide.com

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TRANSPORTATION

H&M Bay Inc. ● www.hmbayinc.com

H&M Bay is a premier LTL freight logistics provider of frozen and refrigerated commodity shipments, with seven strategically located LTL consolidation facilities in California, Florida, Indiana, Massachusetts, Maryland, North Carolina, and Washington. H&M Bay's focus on customer satisfaction continues through a host of Web-based services, and a computerized dispatch and tracking system that enables customers to access order and delivery status reports. To grow your business with H&M Bay, visit our Web site today.



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Lynden • www.lynden.com

Over land, on the water, in the air – or in any combination – Lynden has been helping customers solve transportation problems for almost a century. Operating in such challenging areas as Alaska, Western Canada and Russia, as well as other areas around the globe, Lynden has built a reputation of superior service to diverse industries.

TRANSPORTATION/FREIGHT MANAGEMENT

ChemLogix, LLC • www.chemlogix.com

ChemLogix, LLC is the leading provider of comprehensive chemical industry logistics management outsourcing and technology services that, together with its supply chain consulting resources, enable its clients to improve performance and drive economic value. ChemLogix is dedicated to solving its customers' most vital logistics challenges by leveraging chemical industry expertise, best-of-breed technology, and a personalized, high-touch approach to deliver measurable, sustainable value. For more information, visit www.chemlogix.com or email information@chemlogix.com.





COGISTICS • www.cogistics.com

COGISTICS is the choice for reducing your transportation spend. We have spent the last two decades listening to our customers and building solutions designed to help them beat their objectives – whether it's a Fortune 500 company or a medium-sized business. The COGISTICS Freight Bill Pre-audit and Payment system can be integrated into customer-specific processes, whether it is building a Transportation Data Warehouse, creating a state-of-the-art Business Intelligence Tool, or collaborating with our customers to effectively and efficiently manage their transportation. COGISTICS Transportation (wholly owned sub) offers Supply Chain Transportation Management services utilizing our world-class TMS. This program will be created collaboratively and meet your specific requirements. Customer satisfaction is our priority. Call to learn more: 863-647-9389, ask for Jeff.

Crowley Logistics • www.crowley.com/partner

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CT Logistics • www.ctlogistics.com

CT Logistics can help you save money, no matter your company's size. For small- and medium-sized shippers, CT Logistics offers its TranSaver shipper cooperative buying program. Larger shippers can simplify their freight spending with CT Logistics' exclusive FreitRater freight bill rating and processing system. And businesses of all sizes can benefit from AuditPay freight payment services. Add to these offerings a wealth of online collaboration and reporting tools, and it's easy to see why shippers have trusted CT Logistics with their freight payment needs for more than 90 years.

eShipGlobal • www.eshipglobal.com

eShipGlobal is an on-demand Transportation Management Solutions (TMS) provider, offering complete and customizable TMS solutions to manage clients' transportation functions – from sourcing, shipment execution, and visibility to freight audit and payment settlement. Our customers can reduce their freight spend with our solution tailored to their business needs. eShipGlobal's Webbased shipping solution delivers these benefits on desktops, warehouses, and mailrooms of leading companies around the world. The solution focuses on freight management, inbound shipments, and export control custom documentation that provides a solution and service offering like no other in the industry.





Geodis Wilson ● www.geodiswilson.com

With 5,500 people and a global network, Geodis Wilson is one of the world's largest freight management companies, serving customers with integrated supply chain solutions that deliver cargo by sea and air. The company's expertise, value-added services, and e-services enable you to streamline the flow of goods. We also make your supply chain more transparent and easier to manage. A self-reliant network of offices, and air and ocean hubs in more than 50 countries, ensures that your cargo flows efficiently and consistently across the world.

New Breed ● www.newbreed.com

To meet today's challenges in transportation management, New Breed has invested in world-class technologies and intellectual resources to offer unsurpassed performance levels. Our job is more than optimizing your transportation service levels, our job is helping you outpace your competitors.



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NFI • www.nfiindustries.com

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TranSolutions Inc. • www.transolutionsinc.com

TranSolutions Inc. is a leading supplier of freight claim management, logistics, claim recovery, loss and damage software, freight claim overcharge, loss prevention database, and Web-based applications. Our clients include Global 5000 companies in the specialty chemicals, pharmaceuticals, consumer packaged goods, and food and beverage industries. Since 1997, TranSolutions Inc. has helped companies decrease freight claim-generation cycle time and increase claim documentation organization, while reducing data input errors, accelerating carrier claim payment, increasing efficiency, improving quality, and directly influencing the freight claims management process.





TranzAct Technologies, Inc. • www.tranzact.com

TranzAct Technologies, Inc. helps shippers reduce their transportation spend while providing the tools necessary to remain in control and focus on business development, not task management. You can make better business decisions on an ongoing basis with our solutions, which include accurate and timely freight audit and payment; flexible, Web-based reporting and TMS applications; and carrier contract negotiation and consulting that deliver sustainable results.

Wagner Logistics • www.wagnerlogistics.com

Wagner Logistics is not just a trucking company, warehousing company, or any other narrowly defined organization. We're a third-party logistical services company with multiple competencies to provide diverse services for our many customers across the United States. We provide contract trucking and transportation management, distribution centers, warehousing centers, packaging and assembly operations, and fulfillment. Plus, all services are provided with the highest standards of quality and the most technologically advanced information management systems. With our many areas of expertise, we can tailor a supply chain solution for your company to provide you with superb service while lowering your net cost.







Werner Enterprises, Inc. • www.werner.com

Werner Enterprises, Inc. was founded in 1956 and is a premier transportation and logistics company, with coverage throughout North America, Asia, Europe, South America, Africa and Australia. Werner maintains its global headquarters in Omaha, Nebraska and maintains offices in the United States, Canada, Mexico, China, and Australia. Werner is among the five largest truckload carriers in the United States, with a diversified portfolio of transportation services that includes dedicated van, temperature-controlled and flatbed; medium-to-long-haul, regional and local van; and expedited services. Werner's Value Added Services portfolio includes freight management, truck brokerage, intermodal, and international services.

TRUCKING

AAA Cooper Transportation • www.aaacooper.com

AAA Cooper Transportation has been delivering safe, efficient transportation for more than 50 years. With strategically located service centers, we are prepared to give individual attention to your shipping needs.

AAA Cooper Transportation is dedicated to the long-term sustainability of the environment, and continues to implement processes that will make the world a better place to live for generations to come.





FFE Transportation Services, Inc. • www.ffeinc.com

FFE Transportation strives to be the leader in solutions development and execution in the temperature-controlled LTL and truckload markets. We will leverage our core competencies in refrigerated transportation that have been developed over 60 years across our enterprise to provide our customers with the highest levels of service which represent great value. Every member of the FFE team will work in a collaborative manner to exceed the expectations of our customers. We will always strive to deliver a great customer experience and perform with honesty, integrity, and a sense of urgency to deliver on what we promise. Visit our Web site at www.ffeinc.com.

Lynden • www.lynden.com

Over land, on the water, in the air — or in any combination — Lynden has been helping customers solve transportation problems for almost a century. Operating in such challenging areas as Alaska, Western Canada and Russia, as well as other areas around the globe, Lynden has built a reputation of superior service to diverse industries.



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Nebraska Trucking Association ● www.nebtrucking.com

The Nebraska Trucking Association is the statewide trade association for transportation, distribution, warehousing, and logistics companies headquartered in Nebraska. We partner with state and local governments to support economic development and efficient freight transportation. We protect our members' business interests and cultivate a network that improves business opportunities. We reach out to policymakers and the general public with messages about trucking's importance to the state's economy. We help keep Nebraska open for business.

TRUCKING - FLATBED

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Since 1969, Colonial Cartage Corporation (CCC), ABW's in-house carrier, has provided regular temperature-controlled LTL and TL service to all points in the Southeast. CCC currently manages over 11,000 truckloads annually to support plant production facilities. We recently expanded our service areas to include LTL service to the Southwest, Midwest, and Great Plains as far West as the Rockies, with truckload service on additional lanes to IL, TX, PA, and other regions. As an industry leader on safety, we focus on exceptional service to satisfy the most stringent risk management and customer service requirements.

Crowley Logistics www.crowley.com/what-we-do/shipping-and-logistics/

inland-transportation

If you think Crowley offers just ocean freight services, think again. Sure, it provides liner shipping and cargo carrier services throughout Latin America, Puerto Rico, and the Caribbean Basin, employing the latest vessels, equipment, and communication technologies. But Crowley is also one of the most diversified transportation companies in the world, developing innovative supply chain solutions backed by deep relationships throughout the region, far-reaching resources, and an impeccable reputation worldwide. With its extensive shipping capacity, as well as thousands of containers, trailers, and other intermodal components, Crowley ensures the reliability of every link in your supply chain.





Laspada Enterprises • www.mylaspada.com

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PITT OHIO • www.pittohio.com

PITT OHIO is a service organization dedicated to consistently providing high-value transportation and supply chain solutions to our customers. The core values we established in 1979 for our LTL service remain the same today, as PITT OHIO goes beyond the road and exceeds expectations with our supply chain, ground, and truckload services as well. As an organization, we remain committed to innovating in every area of our company, striving to take it to the next level while helping you to optimize your supply chain.

Saia LTL Freight • www.saia.com

For nearly 90 years, Saia LTL Freight has been providing customers with fast, reliable regional and interregional shipping. With 147 terminals located in 34 states, Saia LTL Freight offers a range of products and services that are backed up by a guarantee like no other in the industry. Our Customer Service Indicators, or CSIs, allow us to measure our performance each month against a set of six indices that our shippers said are the most important to them.



TRUCKING - TL



Crowley Logistics

www.crowley.com/what-we-do/shipping-and-logistics/inland-transportation

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Lynden • www.lynden.com

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NFI • www.nfiindustries.com

NFI is a fully integrated supply chain management provider offering logistics, distribution, warehousing, intermodal, global, commercial real estate, consulting, transportation brokerage, and solar services across the U.S. and Canada. NFI owns facilities nationwide and globally, more than 2,000 tractors, and more than 7,000 trailers. Privately held by one family since its inception in 1932, NFI operates more than 21 million square feet of contract and public warehouse and distribution space, and generates \$1 billion in revenue annually. NFI is an EPA Smartway Transport and WasteWise Partner and is dedicated to increasing energy efficiency and reducing the impact of the freight industry upon the environment.

Werner Enterprises, Inc. ● www.werner.com

Werner Enterprises, Inc. was founded in 1956 and is a premier transportation and logistics company, with coverage throughout North America, Asia, Europe, South America, Africa, and Australia. Werner maintains its global headquarters in Omaha, Nebraska and maintains offices in the United States, Canada, Mexico, China and Australia. Werner is among the five largest truckload carriers in the United States, with a diversified portfolio of transportation services that includes dedicated van, temperature-controlled and flatbed; medium-to-long-haul, regional and local van; and expedited services. Werner's Value Added Services portfolio includes freight management, truck brokerage, intermodal and international services.



VENDOR COMPLIANCE



ClearTrack Information Network • www.cleartrack.com/wcc.html

ClearTrack is a supply chain interactive services company enabling the collaboration and management of global, inter-company trade and logistics processes. ClearTrack empowers retail, distribution, and manufacturing companies to better manage global sourcing and direct importing activities. Offering interactive supply chain services across 20,000 vendors and 26,000 factories in 55 countries, ClearTrack enables customers to reduce costs, accelerate order flow, and improve partner performance.

Compliance Networks • www.compliancenetworks.com

Compliance Networks' retail-centric solutions optimize supply chain flow by automating key processes including: vendor compliance and collaboration, scorecards and certification, chargeback management, purchase order fill rate and accuracy measurement, and supply chain alerts. This enables greater supply chain efficiencies. Compliance Networks provides better business intelligence so retailers can make informed decisions and collaborate with suppliers to increase vendor compliance and directly improve the bottom line. Compliance Networks offers a no-risk approach to recovering lost profits in as little as 120 days.



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TransportGistics • www.transportgistics.com

TransportGistics is a global, multi-product and services company that provides market-leading, simple, incremental solutions for transportation management and logistics functions within the supply chain. Our Web-based solutions enable our customers to source, procure, and execute transportation services; enable collaboration; reduce costs; improve processes; identify hidden costs of transportation; improve vendor compliance routing guides; improve Supplier Relationship Management; monitor vendor performance; improve shipment visibility; generate automatic, status-driven alerts; and monitor carrier performance with respect to time in transit, service failure, and billing.

WAREHOUSING

Atlanta Bonded Warehouse Corporation (ABW) www.atlantabonded.com

Since 1948, Atlanta Bonded Warehouse Corporation (ABW) has offered multi-client/public warehousing services to its customers. Originally founded to serve the confectionery industry, ABW now provides distribution for a number of food and food-compatible products. ABW also has extensive experience operating contract (dedicated) facilities. Our operations routinely score best-in-network across an array of Key Performance Metrics, and we have received numerous awards for operational excellence.





Crowley Logistics

www.crowley.com/what-we-do/shipping-and-logistics/warehousing-and-distribution

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MTE Logistix ● www.mtelogistix.com

MTE Logistix provides a wide range of 3PL services in Western Canada focused on warehousing, storage, order fulfillment, product distribution, inventory management, co-packing, and transportation. With 1.5 million square feet in 6 warehouse facilities in Calgary AB and Edmonton AB, our service reach covers all of Western Canada. Capacities include food grade, refrigerated, and indoor and outdoor dry storage.



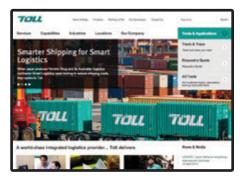


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The West Logistics Group, a third-party logistics company specializing in grocery, consumer, and industrial products, lives and breathes customer service. The company's relationship-based philosophy is based on deep commitments to any size customer-large or small. Whether you need storage, distribution, transportation, or consultation, let West Logistics Group service your world. Get started by visiting the Web site now.



WMS



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Andlor Logistics Systems • www.andlor.com

The Andlor staff has partnered with the logistics industry for more than 30 years. The software is a fully integrated 3PL WMS. The Web front-end provides access for the total supply chain. Users enter orders and appointments, and access receipts, shipments, invoices, claims, EDI data, and client and VMI inventories with scheduled reporting. Andlor offers BacTracs for reverse logistics processing and a yard management system (YMS).

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Cypress Inland Corp. (Yardview) • www.yardview.com

YardView is a Web-based yard management system that is easy to learn and simple to use for operations personnel. Managing yard inventories, movements, appointments, drivers, carriers, time-related events, and other yard activities can be difficult. YardView works for any size operation. YardView is experienced with helping operations become more effective. YardView gets everyone on the same page. The benefits of a software program to help manage these processes are proven and can be realized by your operation. Contact our experts to discuss how we can translate what you are doing now into a more efficient system. Call 303-781-3430.



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May 20-23, 2013, Secrets to Success, Platteville, Wis. This University of Wisconsin-Platteville conference will explore critical themes in supply chain and operations management, including: developing supply chain talent, benchmarking metrics, the Panama Canal's effect on freight, offshore/re-shore decisions, and sustainability management.

800-362-5460 http://GoUWP.com/CONF

May 21-23, 2013, Gartner Supply Chain Executive Conference, Phoenix, Ariz.

Gartner's conference is designed to help senior supply chain executives understand the future role of the supply chain officer; connect with peers to share best practices; validate their strategic visions and investment decisions; evaluate the latest technologies, services, and partnerships; and access the unbiased guidance of industry analysts and thought leaders.

> 866-405-2511 http://bit.ly/SCES2013

June 2-7, 2013, Purchasing and Supply Chain Management, Lansing, Mich. At this seminar, offered by Michigan State University's Executive Programs, educators and industry professionals will share the key strategies and practices that world-class organizations are using to achieve supply chain excellence, and build sustainable competitive advantage.

800-356-5705 execed.broad.msu.edu

June 3-5, 2013, IMFR Global Procurement and Supply Chain for the Oil & Gas Industry, Houston, Texas.

This Institute For Management Research (IMFR) conference educates procurement and supply chain professionals by covering key market challenges, including: supplier/operator relationships, benchmarking strategic procurement practices, capacity overload vs. demand, and sustainability in procurement and the supply chain.

312-894-6304 bit.ly/IMFRCon June 9-11, 2013, TMSA Annual Conference, Ponte Vedra Beach, Fla.

The Transportation Marketing and Sales Association (TMSA) conference features keynote speakers from Google, LinkedIn, and Adobe, who will address successful sales and marketing in transportation and logistics. Attendees will gain insight into transportation-specific methodology that drives revenue growth and improves brand recognition.

609-799-4900 www.tmsatoday.org

June 10-13, 2013, GS1 Connect 2013, San Antonio, Texas. GS1 Connect focuses on corporate initiatives, vendor requirements, and business process requirements of leading retailers. The standards organization's program is divided into five tracks: grocery, retail, foodservice, healthcare, and GS1 solutions.

937-435-3870 www.gs1us.org

October 7-9, 2013, PARCEL Forum '13,

Chicago, III. Parcel shipping, logistics, and distribution/warehousing professionals will learn how to ship more packages, more frequently, and more cost-effectively. With six tracks and more than 50 individual sessions, workshops, panel discussions, and tutorials, attendees will find content geared to their specific job requirements.

203-378-4991 www.parcelforum.com

October 21-23, 2013, CSCMP Annual Global Conference, Denver, Colo. $The \ensuremath{\text{\textbf{Colo}}}$

Council for Supply Chain Management Professionals' (CSCMP) Annual Global Conference offers supply chain management practitioners the opportunity to identify ways to cut supply chain costs, improve the bottom line, discover innovative ideas to keep supply chains competitive, and improve supply chain efficiency.

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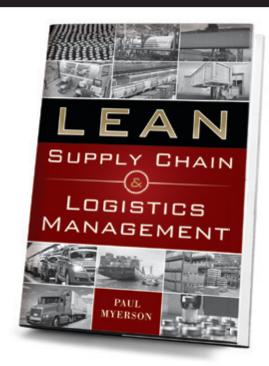








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$\overline{\bigcirc}$	Warehousing/DCs	831
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- N O Intl. Shipping Services, Freight Forwarding
- P () Fleet Operations, Dedicated Contract Carriers
- R O Site, Port, or Facility Selection
- $x \cap Other:$
- z () None of the above
- Number of people at your location. (YOURSELF PLUS OTHERS)
 - м () 1000+
- L () 500-999
- к 🔾 250-499

SIGNATURE (required)

- E 1-99
- J () 100-249

Your job classification.

- (CHECK THE BEST ONE)
- N Corporate Management
- Q O Logistics, Transportation, Traffic Mgmt.
- P () Supply Chain Management, Purchasing, Procurement
- R () Warehousing, Distribution, Inventory, Materials Management
- s Operations, Production, Quality Mgmt.
- ⊤ Customer Service, Marketing, Sales Mgmt.
- z Other:

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DATE

THE LAST MILE



The domestic beer supply chain at a glance.



Beer volumes are measured in barrels.

= 31 U.S. gallons



Americans drink an estimated 22 gallons of beer per person annually, or the equivalent of 330 oil tankers



x 200 million

Overall U.S. beer sales in 2012 • 172.3 million barrels exported

27.7 million barrels imported



x 2,403

Total U.S. breweries operated for some or all of 2012 (highest total since the 1880s).



x 3,300

Licensed, independent beer distributors operating in the United States, handling an average of 535 SKUs each.

\$99 billion worth of beer was sold in the United States in 2012



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