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THE MAGAZINE FOR DEMAND-DRIVEN LOGISTICS • JULY 2010

ANNUAL THIRD-PARTY
LOGISTICS ISSUE

Tying the 3PL Knot

RELATIONSHIP SUCCESS:
For Better or
For Worse

GUESTS OF HONOR:

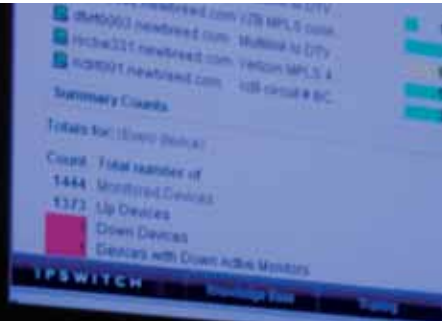
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CHECKING IN

Keith Biondo

by Keith Biondo | **Publisher**



What We've Got Here Is Failure to Communicate

Remember that great line from the movie *Cool Hand Luke*, "What we've got here is failure to communicate"? That's what popped into my head as I reviewed the more than 4,700 responses from readers and 3PLs participating in our annual third-party logistics survey. We asked both 3PLs and their customers the same question: What is the primary reason that 3PL relationships fall apart? Their answers illustrate a failure to communicate.

According to 47 percent of 3PL respondents, the primary reason 3PL relationships go south is "failed expectations," while 20 percent cited "poor customer service." It is reasonable to suggest that responsibility for poor customer service resides with the 3PL. It is also reasonable for 3PLs to think that failed expectations on the part of the customer belong on the customer side of the responsibility ledger.

Customers of 3PLs held almost an exact opposite opinion. Fifty-two percent of shipper respondents feel 3PL relationships fail primarily because of poor customer service, and failed expectations only 23 percent of the time. It's clear that shippers see the issue stemming from the 3PL's failure to provide the expected level of service. It also seems pretty clear that 3PLs think the failure resides in the customer's expectations, not the service provided to that customer. Failure to communicate here, too.

I suppose you could say that customer service and failed expectations are actually two sides to the same coin, but it would be a lot better if both the customer and the 3PL were on the same side at the same time. You could also think that this kind of obverse opinion is the natural by-product of any buy/sell relationship.

But I say no. A 3PL relationship is more like a marriage because of the inherent need for tightly intertwined business operations. Given the complexity and scale of touchpoints required to make that happen, you would think that there was enough communication to ensure that the expectation gap was small. Can you guess the top reason cited for marriage failures? Right, communication.

Could the paradox raised by this survey's dataset be the fault of the monumental and increasing complexity of what businesses and their 3PL partners are trying to achieve? Could the rigid structure of the RFP process itself cause the polar-opposite perspective on this question? Is it time to re-examine the entire 3PL selection process and forge a successful business logistics relationship?

Perhaps. But one thing is certain—without better communication on both sides about service expectations and performance limits, chances for success will only be slightly improved. ■

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CHECKING IN

Felecia Stratton

by Felecia Stratton | **Editor**



Are You Talkin' to Me?

Some results from our annual third-party logistics survey caused the publisher of this magazine to quote a line from *Cool Hand Luke*: “What we’ve got here is failure to communicate” (see *Checking In*, page 8). When 3PLs and their customers were asked the same question, but provided diametrically opposed answers, the publisher suggested that more shipper/3PL communication may be called for.

More communication couldn’t hurt. But, from where I sit, our annual third-party logistics issue is more like Robert DeNiro in *Taxi Driver*: “Are you talkin’ to me?”

The articles and special features in this issue illustrate plenty of communication between shippers and their logistics partners. In fact, communication was so fundamental to this issue that we chose a wedding theme to symbolize the close relationship between 3PLs and their customers. In many ways, the 3PL/shipper relationship is like a marriage, and, as all you married folks know, a successful partnership requires a great deal of communication.

Communication drives the successful “married couples” profiled in Perry Trunick’s feature article, *Tying the 3PL Knot*, page 66. You’re invited to see how 3PL/shipper partners court each other, then stay together, for better or for worse.

In addition to the real-world examples of how good communication drives solid logistics partnerships, this issue features a second level of communication: the volume and depth of information that readers and third-party logistics providers shared by participating in our research efforts.

We received mega-communication from shippers who

communicated not only their choices for this year’s Top 10 3PLs, but also in-depth responses to questions about the 3PL market. More than 4,660 shippers submitted 9,563 votes for their favorite logistics service providers, devoting an unbelievable 500 man hours to respond to our research. Now that’s communication. You’ll find the Top 10 3PL Excellence Award winners on page 112, and the results of our exclusive research in *3PL Perspectives*, page 81.

On the 3PL side, more than 300 logistics providers let us peek behind their curtains, and shared financial information, investment strategies, and growth and expansion plans. 3PLs communicated to us their service capabilities, providing insight and information not available on their Web sites or anyplace else. Their willingness and openness to communicate gives you insight into the capabilities and services available from the 3PL market (see *Top 100 3PLs*, page 102).

While there may be individual cases of communication breakdown in shipper/customer relationships, the examples in this issue show that people in our industry know what’s needed to get the job done and they are willing to share the information required to make that happen. This publication acts as a pivot point, with both parties providing information that can be used as a point of departure for greater success in collaborating to face today’s tough logistics challenges.

Are you talkin’ to me? I hope so. If you want to communicate your perspective on 3PL relationships, or any other topic, talk to me: editor@inboundlogistics.com ■

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DIALOG

LETTERS TO THE EDITO



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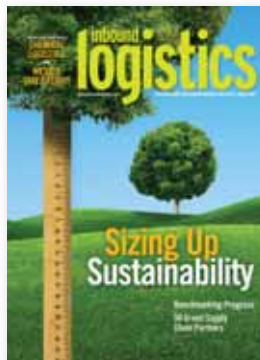
I really liked your take on sustainability in the June issue of *Inbound Logistics*. I think you hit the nail on the head about metrics. As expected, many companies cover themselves in a green patina with less-than-serious approaches, and your attention to verifiable, measurable initiatives is the right message at the right time. Well done.

As an example of what is happening in other sectors, convention/events/meeting trade associations in conjunction with the Environmental Protection Agency and ASTM (a standards group) are now very close to rolling out industry criteria for "greenness" in their world. One component is freight, and the standard includes everything from biodiesel to idling.

My point is that other industries are determining what is green in terms of freight transportation, and they are going far beyond SmartWay partnerships into sensible areas that cost very little.

Is anyone in the freight business working on a voluntary standard? If not, why?

—Mike Ellis, president, EA Logistics



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—Michael A. Gilkey

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Back Issue Issues

I am writing to let you know about some problems I am having with my *Inbound Logistics* subscription. I don't usually get too worked up over a magazine subscription, but in this case I am because *IL* is my favorite trade magazine and I use a lot of the information in your publication at my workplace.

I changed jobs not too long ago and let my subscription run out, but

I decided it was time to get on board again. I contacted you and had the magazine sent to my new address. I received the May edition and thought that everything was going to be fine (It was great as always!). But here I sit going into the middle of July, and I have not received another issue of your magazine.

I have been in this industry since 1998 and I have seen many changes since then. *Inbound Logistics* helps me stay ahead of the changes, or at least be



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10TIPS

STEP-BY-STEP SOLUTIONS

by Deborah Catalano Ruriani



Choosing the Right Product Packaging

With today's complex supply chain and compliance requirements, manufacturers have a lot to consider when making packaging decisions. Here are some tips on choosing the right packaging for your product from Michael Smyers, CPSM, business development manager, and Matthew Paul, supply chain consultant, of Fort Myers, Fla.-based supply chain management and customs firm Allyn International Services.

1 Review relevant regulations. If you are shipping overseas, familiarize yourself with regulations such as the International Standards for Phytosanitary Measures. Non-compliance can result in product returns, shipment delays, and extra costs for inspections and/or repackaging.

2 Ask for customer handling, receiving, and inspection requirements. Shipping departments should be aware of typical packaging requirements, such as labeling specifications.

3 Consider the transportation mode. Each transport mode subjects shipments to different levels of environmental exposure, physical forces, and re-handling. Also, security and cargo liability regulations are usually

mode-specific. If shrink-wrapped or banded shipments are opened for examination, cargo may be damaged later in transit.

4 Look at the product's physical traits. To reduce cargo damage from transport, storage, and handling, determine susceptibility to water, sunlight, temperature, and physical stress such as compression, impact, vibration, and surface contact. Perishable, hazardous, and high-value products may require special packaging.

5 Know if the product is subject to inspection. Products are often inspected upon delivery for quality conformance and accurate ship count. When receiving more than one item, the end customer may prefer a bulk package that can be easily opened for inspection, then resealed for movement to the warehouse, factory floor, or store shelf.

6 Reduce the packaging profile. Freight rates for less-than-containerload ocean and air parcel shipments are typically structured on a weight/measure basis. Dense cargo is billed at the actual shipment weight, whereas lighter cargo is billed according to the volume displaced. Reducing the packaging profile can cut freight costs.

7 Build in visibility. No matter how lean the supply chain, most products will be stored or handled multiple times. To increase visibility and chain of control, incorporate bar codes, radio frequency identification tags, and GPS technology into the product's packaging.

8 Consider reusable designs. Reusable packaging can achieve lower total costs and improve sustainability. A reverse logistics program and committed supply chain partners are prerequisites to initiating a reusable packaging program.

9 Be conscious of extended producer responsibility (EPR) initiatives. EPR reforms, which several governments have instituted, make manufacturers responsible for a product's entire lifecycle. Some companies are including return packaging and incorporating reverse logistics with their products, so consumers can easily return items such as electronics devices for recycling, instead of discarding them.

10 Use eco-friendly materials. Choose sustainable packaging materials such as recycled corrugated cardboard and cornstarch-based packing peanuts. ■

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[INPERSPECTIVE]

BY PERRY A. TRUNICK

Associate Editor, Inbound Logistics
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Demanding Response

Inexpensive transportation and sophisticated IT tools allowed us to operate extended supply chains. But that tide may be turning.

One finding of this year's *State of Logistics* report is that U.S. businesses ran up inventories because their extended supply chains didn't respond quickly enough to the drop in demand. Once they got in synch, however, inventories began to run very close to demand. Is this lesson sustainable? Are we going back to build-to-order versus build-to-stock?

Japanese automakers taught us we could build very responsive supply chains that were in synch with demand. They also found that the long supply chain between Japan and North America had its problems.

For one, a buyer might be able to fill an order faster through a domestic supplier. Japanese manufacturers could do little to change that because, no matter how fast their supply chain and production line responded, the ships couldn't sail any faster.

The solution was to get a good handle on what the customer wanted, then stock the dealer network. Fill a ship and send it on its way so Detroit didn't have the home-field advantage on delivery time. The total order-to-deliver cycle was faster in the United States because what Detroit manufacturers lost in production time, they gained in transport time.

So, two or three weeks being equal, if you can put the right inventory where the demand is, a foreign manufacturer could be competitive.

I remember buying a Toyota in

the 1980s. The dealer had three of the model on his lot—one each in red, white, and blue. One was loaded. One was stripped. And one had the middle package (radio, but no tape deck). It wasn't build-to-order, but it probably satisfied 80 percent of customer needs 90 percent of the time.

ONLINE RETAILERS KNOW IT ALL

That was good market research for the time. Today, online retailers know everything I have searched, not just what I order. If 90 percent of people shopping for a Toyota Camry click to see how it looks in green, you can bet green will be the most popular color choice this year. So, make more green cars.

The Japanese realized they could not build to order, but they did a good job of anticipating market trends in their build-to-stock approach. American manufacturers could flood dealers with inventory, so there has to be a green car on the lot, with most of the options you want. And if it has more options, we'll discount so you

close the deal today.

Where distance is not an issue, the responsive Japanese supply chain held the advantage. In their home market, drivers were generating demand when they bought a car. But in North America, they told the dealer network what it was getting (based on market research). They satisfied 100 percent of the demand as they defined it, and the production process was the most efficient in the world.

The problem was, the supply chain doesn't stop at the end of the production line. You need real demand to pull production. The model works if you forecast demand accurately.

It becomes a problem when the demand trigger falls out of synch with the supply chain response. Two weeks of pipeline inventory isn't a problem if you're overstocked in \$20 coffee-makers. It's financially devastating if you're overstocked in \$20,000 cars.

One solution is to get a better handle on supply chain demand and pull. Another is to reconfigure your supply chain to make it shorter and more responsive. Smart companies will be spending some capital now to do both so they preserve more substantial capital assets into the future and not have them tied up in costly inventory that will depreciate rapidly.

Supply chains can still be a strategic asset. ■

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Last Mile Delivery And Logistics Solutions

READER PROFILE

by Merrill Douglas

Flower Power

The flower business isn't for the faint of heart. You have to keep your inventory moving and cool, and the shelf life is incredibly short. Also, just two holidays—Valentine's Day and Mother's Day—determine a big share of your sales and profits.

"If you mess up one week, you blow your financials for the whole year, and you lose those customers forever," says John Kuehn, senior vice president of supply chain operations at San Diego-based Provide Commerce, which operates the e-commerce Web site ProFlowers. In addition to delivering fresh-cut flowers, mixed bouquets, and potted plants direct to consumers, Provide Commerce runs three other Internet businesses: Cherry Moon Farms sells fresh fruit and other edible gifts, Shari's Berries specializes in hand-dipped berries, and Red Envelope focuses on personalized and unique gifts.

Kuehn is responsible for logistics, transportation, production, fulfillment, planning and inventory management, sourcing and procurement, and product quality. He also oversees one team that controls data accuracy on the e-commerce sites, and another that continually adjusts the supply chain to boost velocity and quality and remove costs.

Provide Commerce works with about 200 supplier-partners that ship product directly to customers. It also receives product in about 20 third-party and company-owned fulfillment centers throughout the United States. In those facilities, workers package gifts and prepare them for shipping.

Of the issues that challenge the company's fast-paced supply chain, probably the most remarkable is the emotion attached to many of the orders, especially for flowers. "It's not a high-dollar purchase, but the delivery expectations are high,"



FRESH CUT

NAME: John Kuehn

TITLE: Senior vice president of supply chain operations, since 2009

COMPANY: Provide Commerce Inc., San Diego, Calif.

PREVIOUS EXPERIENCE: Various operations and supply chain positions, Hewlett Packard; senior director of worldwide logistics, Apple Computer; vice president of planning and logistics, Gateway; senior vice president of planning and logistics, Provide Commerce.

EDUCATION: Iowa State University, BBA in logistics, 1988.
Santa Clara University, MBA, 1993.

The Big Questions

What do you do when you're not at work?

I'm an avid investor. I'm also into sports such as kayaking, snorkeling, scuba, and surfing.

Ideal dinner companion?

Ronald Reagan. I'm intrigued by his great leadership abilities, communication skills, and sense of humor.

What's in your briefcase?

My taxes; I had to file for an extension because they were due in the middle of our busy season.

Business motto?

I have two: "Fail to plan, plan to fail" and "Where there's a will, there's a way."

If you didn't work in supply chain management, what would be your dream job?

A veterinarian, sports agent, architect, or general contractor.

Kuehn says. "You don't send your wife roses the day after Valentine's Day."

That makes on-time delivery critical, even in the face of events like the back-to-back blizzards that crippled much of the East Coast in February 2010. Needing to get flowers into snow-stricken markets for Valentine's Day, ProFlowers tapped its deep relationships with FedEx and UPS.

"We were able to deliver product to areas where the carriers could get planes and product in, and control temperatures—too much cold is as bad for flowers

as too much heat," says Kuehn.

But it took even more to get flowers to doorsteps on time this year. Long before the flakes started falling, Kuehn and his team were wrestling with the fact that Valentine's Day 2010 fell on a Sunday, when neither FedEx nor UPS runs, sorts, or puts couriers on the street. ProFlowers risked losing a significant amount of business to merchants that use other delivery strategies.

Kuehn and his team saw this crisis coming, so three years ago they started asking their carriers to roll their trucks

on Sunday just for ProFlowers.

"They thought we were joking," Kuehn says. "But we kept talking about it until they realized that we were not going away."

Finally, FedEx agreed to play Cupid. February 14, 2010, marked the first time the carrier had ever worked with an individual shipper to deliver on Sunday. "Any truck on the road on Valentine's Day was only carrying ProFlowers' product," Kuehn says.

The stakes were high, but everything came up roses. ■

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NOTED

THE SUPPLY CHAIN IN BRIEF

SEALED DEALS

Kimberly-Clark, a provider of health and hygiene brands, selected **APL Logistics** to manage the distribution of its products throughout Indonesia. The 3PL will coordinate transportation from Kimberly-Clark's Jakarta distribution center through a network of more than 70 locations in 11 cities across the country.

Ryder System has signed a dedicated contract carriage transportation agreement with **Marco's Pizza Distribution**. Under the multi-year contract, Ryder-purchased tractors, refrigerated trailers, a hired team of drivers, and on-site management will orchestrate product delivery from the pizza chain's Maumee, Ohio, distribution center to franchises throughout the Midwest.

Foster Farms Dairy has chosen **HighJump Software's** warehouse management system (WMS) to optimize operations in three manufacturing locations and one distribution center. The WMS will enable Foster Farms Dairy to increase productivity, accuracy, and end-to-end visibility for all inventory, including finished goods, packaging, and ingredients.

Moët Hennessy, the drinks division of the LVMH Moët Hennessy-Louis Vuitton Group, has signed a contract naming **Kuehne + Nagel** as its exclusive logistics provider of warehousing and distribution services in Spain. The 3PL will consolidate all of the company's logistics activities in Madrid to provide increased flexibility and faster response times.

soundbyte

"The railroad doesn't need the government to build new highways and airports...It's the only mode of freight transportation that can handle growth. What's not to like about that?"

— Berkshire Hathaway CEO Warren Buffett, commenting to *USA Today* about his reason for acquiring Burlington Northern Santa Fe Railway.

UP THE CHAIN

Mark Bierley has been named chief operating officer at **Borders**, while continuing as chief financial officer for Borders Group. In his dual role he oversees supply chain, finance, IT, and merchandising, as well as real estate and strategic planning. Bierley began his career at Borders as manager of store inventory control in 1996.

U.S. Steel Corporation named **Gerald Gagliano** general manager of logistics services. He is responsible for overseeing all outbound rail, barge, and truck operations at U.S. Steel facilities in the United States and Canada. He was promoted to his new role having previously been director of supply chain management in the company's enterprise resource planning group.



FIPA, which develops vacuum technology and gripper assembling systems, appointed **Tom Herndon** general manager of its North American operation. As a specialist in automation technology, he provides technical assistance to all current FIPA customers in the United States, Canada, and Mexico. He also manages the company's warehouse in Atlanta.

Pamela Beall has been promoted to vice president of products supply and optimization at **Marathon Oil**. Previously vice president of global procurement, and with a background in financial auditing, Beall is charged with enhancing the competitiveness and success of Marathon's downstream operations.

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GREEN SEED

OFM, an office and school furniture manufacturer, distributor, and wholesaler, is financing a new project that will help make its headquarters completely carbon neutral. The company is installing a 250-kilowatt solar photovoltaic system on the roof of its main facility in Holly Springs, N.C. The power generated each month through the solar farm will then be sold to Progress Energy.

UPS debuted a new cost-effective and convenient “green” pickup option for small- to medium-sized businesses. UPS Smart Pickup is designed for shippers who want a scheduled pickup but may not ship a package every day. The service ensures drivers stop at a customer location only when there is a package being shipped – thereby eliminating eight million miles driven, 793,000 gallons of fuel, and 7,800 metric tons of CO₂ emissions.

▼ **McDonald’s** has recognized **LXP**, an Armada Supply Chain Solutions company, as one of its Best of Green 2010 companies for environmental innovations and best practices in the category of climate change. The 3PL, which is

a McDonald’s supply chain management partner, implemented multiple initiatives that reduced its carbon footprint by 1,173 tons while also removing the CO₂ gas equivalent of 2,224 cars from the road.



m&a

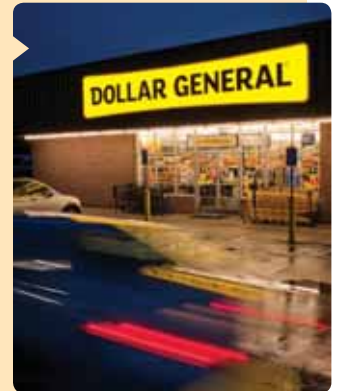
Consona Corporation, a customer relationship management (CRM) and enterprise resource planning (ERP) software vendor, has completed its acquisition of **Compiere**, a provider of cloud-based, open-source ERP and CRM software. The deal positions Consona to become a leading provider of enterprise-class, cloud-based business solutions, and provides the company with an entry point into the distribution ERP market.

RedPrairie purchased **SmartTurn**, an on-demand inventory and warehouse management system (WMS) provider. The acquisition adds a multi-tenant software-as-a-service WMS to RedPrairie’s existing productivity suite, providing the software company with a warehouse solution for distribution operations of all sizes and levels of complexity.

Arpin Group has acquired the stock of **Affiliated Transportation Systems** (ATSI) and eight related companies. ATSI is a household goods transportation service provider located in Lawton, Okla., and primarily serves military personnel. The move will provide opportunities for Arpin Van Lines’ agents to pack and haul shipments that are booked by ATSI.

recognition

Dollar General presented **Averitt Express** with two honors: LTL Carrier of the Year 2009 and Carrier Partner of the Year 2009. The awards are in recognition of the carrier’s efforts to meet on-time service, quality, and flexibility expectations; as well as demonstrating innovation in handling Dollar General’s transportation needs.



Covenant Transport was honored for its safety record at the **California Trucking Association’s** Fleet Safety Awards banquet. The carrier received first place in the General Commodity Truckload Over Seven Million Miles Division, and first place in the Local Under Four Million Miles Division. The awards program judges companies on accident frequency, personnel and hiring systems, documented safety policies, and driver-safety training.

Holland, a subsidiary of YRC Worldwide, received the 2009 Supplier Excellence Award from **Eastman Chemical Company** as part of the Eastman Supplier Excellence Program. The honor recognizes outstanding contributions in the areas of logistics shipping performance and meeting customer service expectations.

Horizon Lines has received recognition from the Chamber of Shipping of America (CSA) for its record of safety and stewardship. The CSA presented Horizon Lines with the 2009 Jones F. Devlin Award, which recognizes safe ship operations.

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TRENDS

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Panel participants at the State of Logistics Report included (clockwise from left): Don Ralph, SVP, Staples; Rosalyn Wilson, report author; John Lanigan, CMO, BNSF; Vince Hartnett, president, Penske Logistics; and Peter Sturtevant, VP, Covidien.



THE 21st ANNUAL STATE OF LOGISTICS REPORT:

Beating the Recession

June 9, 2010: The nagging question raised during the Council of Supply Chain Management Professional's 21st-annual State of Logistics Report, presented by Penske Logistics, was how industry could apply lessons learned during the recent economic tailspin to the new normal. Rosalyn Wilson's annual presentation at the National Press Club in Washington, D.C., got right down to the nitty gritty details beginning with the title of the report: *The Great Freight Recession*.

For many companies, longer supply chains and speculative demand triggered an inventory clearinghouse. "All business inventories dropped for the first three quarters of 2009. Companies cleared inventories at a rate not seen in 30 years," said Wilson.

But many were unable to keep ahead of the drop in demand. Consequently, the inventory-to-sales ratio (a measurement that compares inventory against sales for the same month, with a ratio of 1.0 indicating inventory excess and 1.5 equating to

Photos: Courtesy Penske Logistics/CSCMP

July 2010 • Inbound Logistics 27

one and a half months of inventory at current sales rates) reached 1.48.

Orders placed months before the recession was in full swing continued to flow, despite market conditions. Retail was the quickest to respond, adjusting for declining consumer demand in early 2008. But the inventory-to-sales ratio skyrocketed from 1.26 in 2007 to 1.48 in early 2009. It returned to 1.26 by the end of last year and even reached 1.23 in the most recent report.

Corporate efforts to draw down stock accounted for most of the drop, but as demand has started to pick up, ordering has kept more in line with demand. Whether or not this lean position is sustainable was a hot topic among the panel of industry experts gathered to comment on the report.

Those Who Cannot Remember the Past...

Across-the-board cuts aren't sustainable, but targeted efforts are stronger and offer a better opportunity to create long-term efficiencies, explained Don Ralph, senior vice president for supply chain and logistics at office supplies retailer Staples.

Burlington Northern Santa Fe Railway (BNSF), for example, made a concerted effort to specify improvements in processes "all the way from the terminal gate to the customer door," said John Lanigan, executive vice president and chief marketing officer for BNSF.

Specific manufacturing industries responded in kind. Covidien, a medical device developer, fared better than most during the economic stumble, so it proactively invested resources toward automating its distribution centers.

"By bringing automation into our facilities, we are significantly more productive than simply throwing people at inventory," said Peter Sturtevant, vice president of supply chain solutions and transportation at Covidien. "That's going to be key to our distribution center strategy moving forward."

Covidien's direct approach to improving warehouse productivity paid extra

dividends by allowing it to organically consolidate its U.S. distribution footprint. It's these lessons that will serve industry well as it emerges from the recession, suggested Tom Speh, James Evans Rees Distinguished Professor of Distribution, The Richard T. Farmer School of Business, Miami University of Ohio.

"I think we've learned some things about managing inventory. But what concerns me is that research demonstrates only 10 percent of cost savings become sustainable following a recession," he added.

For example, many retailers changed their focus to lower-cost items, shrunk product SKUs, and reduced the number of items per outlet to eliminate substantial restocks. Manufacturers maintained lean ordering, requiring suppliers to hold inventory and therefore reduce exposure to obsolete products.

Long supply chains also impacted inventory strategy. "Several manufacturers reported shutting down production lines because they lacked the necessary materials and parts to produce finished products," said Wilson.

But even with all these changes, and perhaps in part because of them, "we've opened up the supply chain to greater risk," observed Speh. "Industry may

THE STATE OF LOGISTICS 2010: For What It's Worth

(in \$U.S. billions, except where noted)

CARRYING COSTS

(\$1.851 Trillion, All Business Inventory)

Interest	\$ 5
Taxes, Obsolescence, Depreciation, Insurance	\$ 233
Warehousing	\$ 119
SUBTOTAL:	\$ 357

TRANSPORTATION COSTS

Motor Carriers:

Truck-Intercity	\$ 368
Truck-Local	\$ 174
SUBTOTAL:	\$ 542

Other Carriers:

Railroads	\$ 50
Water	
INTERNATIONAL	\$ 25
DOMESTIC	\$ 4
Oil Pipelines	\$ 10
Air	
INTERNATIONAL	\$ 14
DOMESTIC	\$ 15
Forwarders	\$ 28
SUBTOTAL:	\$ 146

SHIPPER-RELATED COSTS

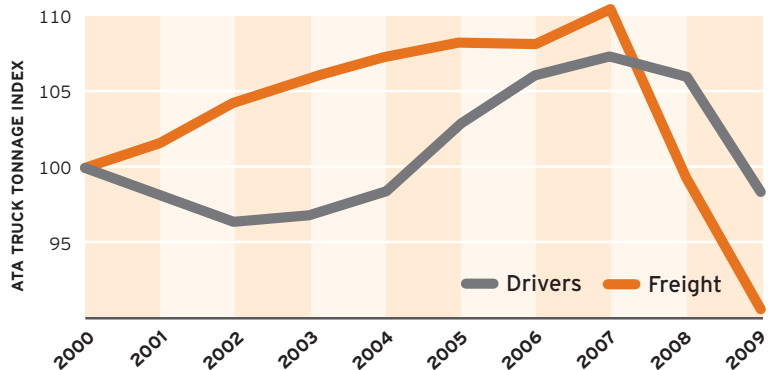
LOGISTICS ADMINISTRATION	\$ 42
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TOTAL LOGISTICS COST \$ 1,096

SOURCE: 2010 State of Logistics Report

Number of Truck Drivers vs. Freight Carried

Since 2008, freight volume and driver demand have plummeted. Industry observers don't expect a corollary rebound in new drivers when the economy recovers.



SOURCE: Bureau of Labor Statistics, Bureau of Transportation Statistics

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have cut a little agility out of the supply chain, and we need to make sure we can get it back."

...Are Condemned to Repeat It

Out of necessity, shippers and service providers leaned their operations to reduce costs. Now they are exposed to re-emerging risks. Some of this comes from reduced capacity on the carrier side.

Many shippers responded to their own internal cost pressures by moving from long-term carrier relationships to the spot market or third-party logistics partnerships. 3PLs, in turn, pressed carriers harder for rate reductions, explained Wilson. As fuel costs dropped, surcharges played less of a role in revenue generation for trucking companies. Length of haul also continued to drop as shippers shifted more long-haul moves to rail/intermodal and

utilized regional distribution strategies where possible.

With truckload volumes dropping faster than capacity in 2009, there was little incentive for motor freight carriers or asset-based 3PLs to keep equipment. In addition to planned asset attrition, approximately 2,000 trucking companies went out of business during the last

Covidien, a medical device manufacturer, fared better than most companies during the recession. It proactively invested resources to automate its distribution facilities and increase productivity.



year. Beyond that, another 2,000 carriers could be driven from the market in 2010 due to increased operating costs and low demand, Wilson added.

Citing an American Trucking Associations (ATA) figure of a 12.8-percent contraction in capacity in 2009, Wilson commented that asset utilization stood at only 75 percent, which

THE STATE OF TRANSPORTATION: 2010 Trends By Mode

Source: 2010 State of Logistics Report



Air Freight

During the downturn, many carriers decommissioned aircraft and removed them from their fleets. The International Air Transport Association says that 12 percent of cargo capacity was lost in 2009, with widebody freighter capacity down 22 percent. The airfreight industry is experiencing an intensive shortage of capacity, which has led to spiraling rates and a shipment backlog. But this was welcome news to beleaguered carriers who had been hit with high fuel costs and low demand.



Maritime

Costs for the maritime sector fell 21.6 percent in 2009, as traffic through the nation's ports contracted again. All top 10 ports, with the exception of Oakland, registered a decline in TEUs moved. Ocean carriers reported big losses in 2009, especially as spot rates were depressed below costs and desperate carriers tried to fill their ships, while idling others. Rates did begin to rise by the end of 2009 and have continued to strengthen in the first half of 2010.



Trucking

Trucking, the largest component of the transportation sector, has been one of the hardest hit modes throughout the recession, with logistics costs dropping 20.3 percent in 2009. On a volume basis, truck tonnage was down 8.7 percent last year, over already depressed 2008 levels. There was abundant capacity competing for fewer loads, which led to price wars that often dropped rates well below cost on the spot market. As the market reverses itself and capacity tightens, shippers will be looking to their transport partners to help secure space.



Rail/Intermodal

The cost for rail transportation was down 20.6 percent in 2009. Carload traffic was down 16.1 percent and intermodal traffic declined 14.1 percent – 2009 was the worst year on record since 1988 when the Association of American Railroads began tracking this data. Every major commodity group experienced a decline. Much of the decline in intermodal traffic during the past year is attributable to the 33.8-percent drop in trailers hauled. The absence of fuel surcharges and aggressive pricing strategies dropped revenue to 3.01 cents per ton-mile in 2009 from 3.34 cents in 2008. The good news is that fuel as a percent of operating expenses went from 25.8 in 2008 to 15.3 in 2009.

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wasn't sufficient to generate new truck sales. Orders have only recently started to pick up in 2010.

While equipment capacity is a growing concern, a looming driver shortage is gaining currency again as well. An ATA study in 2005 showed a shortfall of 20,000 long-haul truck drivers. But because freight volumes fell so fast over the last few years, the driver issue was barely noticeable.

Since December 2007, approximately 142,660 drivers have exited the field, Wilson said. More telling, one in six drivers is 55 years old or older, and will be nearing retirement as volumes finally start to rebound. UPS, for one, reports that it expects to see 25,000 of its drivers retire over the next five years. Less than one quarter of current drivers are younger than 35 and the industry has been attracting a smaller share of younger workers entering the job market.

"We've opened up the supply chain to greater risk. Industry may have cut a little agility out of the supply chain, and we need to make sure we can get it back."

— Thomas Speh, Miami University of Ohio

Complicating matters, new safety recordkeeping and enforcement rules under the Federal Motor Carrier Safety Administration's Comprehensive Safety Analysis (CSA) 2010 will contribute to driver shortages and slow the return of capacity to the market. Noël Perry, economist with FTR Associates, predicts a shortage of 200,000 drivers by the end of 2010 and another 200,000 by the end of 2011, for a total shortfall going into 2012 of 400,000 drivers.

A Volatile Road Ahead

Even with a steady recovery of demand, volatility on the supply side of transportation capacity means 2010 will continue to challenge logistics professionals. While the State of Logistics Report is not intended to be predictive, Wilson did acknowledge that 2010 indicators speak to this unpredictability.

On rates alone, driver pay has been driven down as carriers scramble to find ways to cut costs. Layoffs and early retirements, without a swell of new drivers, add to the problem. Safety enforcement is likely to replicate the experience of earlier changes such as the commercial driver license, security background checks, and drug testing—shrinking the pool of drivers and increasing the cost to find and keep qualified workers.

But it isn't all about drivers. Required equipment and technology upgrades are pushing the cost of vehicles higher. Using rail and rail/intermodal, equipment can be brought back online. The railroads are already paying attractive wages and offering good benefits, so railroad jobs are some of the best in the industry. But ocean carriers are holding capacity back to try to support price increases. With new builds in the works, the ocean lines are scrapping older vessels to avoid a glut. Even the troubled airlines, with some widebody capacity idled, are slow to bring back aircraft.

If the cost of transportation is almost certain to go up because of these natural and artificial constraints on capacity, it appears the best supply chain strategy to control costs will be to watch inventory positions and keep supply closely aligned to demand.



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Adidas' Jabulani soccer ball (left) and vuvuzelas (below) created a buzz at the 2010 World Cup. In turn, they kick-started supply chain revolutions.

Making Dollars and Sense out of Jabulanis and Vuvuzelas

One swerved with wild abandon; the other's endless drone left television viewers abandoning sound altogether. Together, they captivated billions of people around the world for 31 days.

Adidas' gravity-defying Jabulani soccer ball and the ear-deafening vuvuzela stadium horns created a buzz at this summer's 2010 World Cup in South Africa, adding to the surreal atmosphere, if stirring some controversy. Goalkeepers had difficulty tracking the ball's trajectory at high altitude and global audiences couldn't figure out the swarming background noise—so much so that TV networks purposely muted ambient sound during telecasts. It was media frenzy on and off the pitch.

But like the old adage goes, any publicity is good publicity. Soccer fans are fanatic about the game, their clubs, their national teams, and their gear. From kits to kitsch, balls and horns included, pride feeds an insatiable appetite that manufacturers and retailers are all too willing to satisfy. Demand for the Jabulani and vuvuzela triggered an upstream supply chain wave that had factories trying to keep pace like defenders pursuing a mazy Lionel Messi run.

The Chinese factories that were pumping out thousands of plastic vuvuzelas and synthetic Jabulani balls found themselves adrift in a logistics

counterattack only matched by the buildup of consumer demand before and during the World Cup. For many, it was a well-orchestrated game plan.

Media outlets reported that 90 percent of the vuvuzelas sold at the World Cup were made in China—mass-produced South African culture courtesy of the People's Republic, go figure. The Ninghai Jiying plastics factory in Ningbo, China, began manufacturing 25,000 vuvuzelas a day in January, filling containers and exporting to South Africa. Another toy manufacturer in Yiwu shipped more than one million units all told.

The vuvuzela's circus appeal has been surpassed only by its profitability. Each one costs approximately 36 cents to make and sells for as much as \$10. It has also created a vertical market for noise creation and mediation. Two of South Africa's largest earplug suppliers witnessed record growth during the World Cup. Ear Plugs Online's sales increased 121 percent; Sheppard Medical sold more than 400,000 sets.

And there are signs the buzz might catch on at sporting venues elsewhere around the world, keeping low-cost Chinese manufacturers tooting their horns as demand drones on. In the United States, for example, Major League Baseball's Florida Marlins



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offered 15,000 free vuvuzelas as a marketing gimmick during the World Cup.

Adidas' Jabulani soccer ball presents a different sourcing challenge, at greater expense. Its thermoplastic polyurethane-elastomer is manufactured in Taiwan; India provides the latex bladder; and the ink, fabric, and glue come from China—where the balls are put together. The real deal sells for \$150.

In spite of the asking price and perhaps because of the “noise” generated by the ball's unique aerodynamics, the Jabulani has become Adidas' best seller, with global sales expected to surpass 13 million units. In addition to the 6.5 million replica soccer jerseys it has already moved—three million more than during the 2006 World Cup—Adidas is predicting a record-breaking year with global revenue in excess of \$2 billion.

Beyond the Jabulani and vuvuzela, other companies ramped up their supply

chains to capitalize on World Cup fever. Manchester, England-based Concave Sports—a soccer footwear manufacturer that kicked off operations in 2007—partnered with third-party logistics provider OHL in January 2010 to manage retail and direct-to-consumer fulfillment in Asia, North America, and the United Kingdom. Good timing.

Serec, a California-based 3PL, opened an East Coast distribution facility to specifically manage Total Apparel Group's fulfillment of FIFA and Kappa-licensed soccer apparel for Walmart—also in anticipation of the World Cup.

At the end of the day—to borrow a favored soccer pundit's cliché—the World Cup is all about pageantry and performance, the vuvuzela and the Jabulani. It's a global phenomenon without comparison. For some companies, even as the horns in South Africa cease blowing and the balls stop rolling, supply chain

motions will continue marching to a rising Samba beat as the clock ticks down on preparations for the 2014 World Cup in Brazil.

—Joseph O'Reilly

T&L M&A Shows Signs of Recovery

An uptick in mergers and acquisitions (M&A) is a positive sign that the global transportation and logistics sector is recovering from the economic meltdown, according to PricewaterhouseCoopers' first-quarter 2010 global transportation and logistics (T&L) industry analysis.

In the beginning of 2010, the pace of deal announcements in the T&L sector was strong, compared with 2009. Thirty-four deals were announced, which exceeds the total number publicized in each of the four quarters last year. Additionally, this quarter's aggregate deal value is on pace to approach the value level of 2009; however, when excluding a major rail transaction from 2009 totals, 2010 deal value is actually on pace to far exceed last year's level. This improvement may indicate that acquirers are gaining confidence to engage in larger takeovers.

“The positioning of acquirers to engage in deal activity continues to improve, supported by generally higher levels of traffic as well as better liquidity and capital market conditions,” says Kenneth Evans, U.S. transportation and logistics leader for PricewaterhouseCoopers. “Rising expectations for economic growth may encourage those acquirers who have remained on the sidelines to re-enter the deal market.”



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GLOBAL

THE WORLD AT A GLANCE

by Joseph O'Reilly

U.K. Duties Hit Air Freight

The International Air Cargo Association (TIACA) has warned that a rumored move by the United Kingdom to replace the existing Airline Passenger Duty with a new per-aircraft flight fee would result in higher taxation across the air cargo supply chain, increased costs for manufacturers and consumers, and no new environmental benefits.

The per-plane fee would ostensibly be imposed for sustainability reasons, as a means of addressing greenhouse gas emissions. TIACA argues that it is unlikely any of the additional revenues will be directed toward improving the environment; instead, they will feed the United Kingdom's general funds.

The industry lobby also stresses that any new tax burden across the air cargo supply chain would impair the aviation industry's ability to continue investing in new green technologies.

Prince Rupert's Princely Returns

As the rest of the world deals with the aftershock of a global economic recession, British Columbia's Port of Prince Rupert keeps steaming along with record traffic. Because the port is two days closer to Asia than any other West Coast gateway, isn't bottlenecked with congestion, and has made considerable investments in rail connectivity to hinterland markets, it has become a vital conduit for Asia-North American trade.

The port improved its performance in the first quarter of 2010, with shipment volumes up nearly 73 percent—handling 4,119,708 metric tons compared to 2,383,510 metric tons during the same period in 2009. The surge in traffic was driven by a 218-percent jump in throughput at Ridley Terminals and an 84-percent increase at the Fairview Container Terminal. This growth follows the best year (2009) at the Port of Prince Rupert since 1997. Much of the growth in containerized export cargo is due to the backhaul of Western Canadian commodities—such as lumber and aluminum—to China.



EU Rolls Out Tarmac For Garuda Indonesia

Garuda Indonesia, the country's national airline, has taken the first step in rebuilding its long-haul international network with the launch of a new daily service from Jakarta to Amsterdam via Dubai. In line with the commencement of this new route, the airline has awarded a Europe-wide cargo contract to European Cargo Services to maximize bellyhold freight capacity.

Amsterdam is the first of several major European destinations, including Frankfurt, London, Paris, and Rome, that Garuda Indonesia intends to add to its network over the next four years. The airline's re-entry into Amsterdam, after an absence of almost six years, marks a significant step forward in its global expansion strategy—and bodes well for further trade opportunities between Indonesia and European markets.

Garuda Indonesia is the first airline to reopen flights to Europe after the European Union's (EU) ban prohibiting Indonesian carriers from operating on the continent was

lifted in July 2009. In 2005, the EU began blacklisting airlines that were not compliant with essential safety standards from flying in European airspace.

Southeast Asia's Diamond in the Rough

In a world run ragged by plummeting trade, one bright spot is Vietnam. The country's export revenue jumped 26 percent year-on-year from January to April 2010 and industrial output grew 13.5 percent during the same period. Vietnam's best-performing sectors include electronics and computers, which rose 39 percent to US \$985 million, and tools and spare parts exports, which increased 75 percent to US \$910 million.

Much of this growth is attributed to intra-Asia business, with 16 of Vietnam's top 20 trade lanes within the region, and dominant import and export markets. Expansion is expected to continue.

A member of the World Trade Organization since 2007, Vietnam's GDP is predicted to grow between 6.2 percent

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and 7.8 percent per year between 2010 and 2014 as a result of several key factors: its large, young, and highly literate population; continued success of the government’s foreign direct investment-friendly Doi Moi policy; political stability; and its proximity to China, Indo-China, and Southeast Asia.

Vietnam’s success also bodes well for carriers such as DHL, which has been aggressively mapping out its own plans for further investment in the country. In April 2010, DHL Express launched its Ho Chi Minh Gateway, located at the new Tan Son Nhat Cargo Express Service airside facility.

U.S., Switzerland Eye Open Skies Pact

U.S. and Swiss officials recently signed an enhanced Open Skies air transport agreement, replacing a previous arrangement ratified in 1995. The new pact includes all the essential elements of Open Skies and adds the right for airlines of both countries to operate all-cargo flights to third countries without a connection to the home country—“7th freedom rights” as it is commonly called.



The Open Skies air transport agreement between the United States and Switzerland allows carriers such as Swiss International Air Lines the right to operate all-cargo flights to third countries.

Additionally, the new agreement permits Swiss airlines to be owned and controlled by nationals of any European Union member state. It also allows them to compete under the Fly America Act for certain U.S. government civilian agency-funded passenger and cargo traffic between the United States and Switzerland and between non-U.S. points.

Open Skies agreements have vastly expanded international passenger and cargo flights to and from the United States, promoting increased travel and trade, enhancing productivity, and spurring high-quality job opportunities and economic growth. They accomplish this by eliminating



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government interference in the airlines' commercial decisions about routes, capacity, and pricing, freeing carriers to provide more affordable, convenient, and efficient air service to customers.

CRG Has Detroit Tunnel Vision

The Windsor Port Authority, Canadian Pacific Railway, and Borealis Infrastructure have formed the Continental Rail Gateway (CRG) coalition to pursue opportunities to develop, fund, and construct a replacement rail tunnel under the Detroit River.

Opened in 1910, the Detroit-Windsor Tunnel's existing freight infrastructure carries approximately 350,000 railcars each year. While still in good condition, it cannot handle double-stacked containers and new generations of multilevel railcars used by shippers and auto manufacturers. The tunnel clearance was enlarged once in 1994 and cannot be expanded further.

Replacing the 100-year-old train tunnel is a key step toward making the

Windsor/Essex County/Detroit/Wayne County region more competitive as a logistics hub. The high-clearance replacement rail tunnel would accommodate double-stacked container trains out of the Port of Montreal, which is important because the port plans to double its container-handling capacity over the next 10 years.

"Cargo Needs the Night" Sees Light

A who's who of German transport and logistics companies, associations, and academia are joining forces to support the "Cargo Needs the Night" initiative, a cause championing competitive operating times at commercial airports throughout the country.

With special direction from Lufthansa Cargo, the effort intends to highlight the importance of the logistics sector to Germany's economy through a series of conferences and related activities.

Currently, 40 percent of the value of Germany's domestic exports is

transported by air. Night flights are a key component in functioning global supply chains, but transport policy decisions are increasingly limiting the competitiveness of German industry.

In recent years, proposed bans on night flights have jeopardized the vitality of Germany's airports and its entire export industry. In addition to challenging European air cargo hubs in Amsterdam, Paris, London, and Madrid, these restrictions threaten Germany's competitiveness with airports in the Gulf region that also serve transcontinental routes between Asia, Europe, and the Americas.

UPS Lauds U.S.-South Korea Free Trade

UPS recently applauded the Obama administration's move to re-engage South Korea and overcome remaining obstacles toward finalizing a bilateral free trade agreement. The U.S. government is attempting to end a three-year impasse on a pact reached

Caterpillar Constructs Manufacturing Foothold in Brazil

Construction and mining equipment manufacturer Caterpillar is looking to expand its production footprint in Brazil and meet growing customer demand across Latin America by siting a new facility there. The location of the new plant will be announced later in summer 2010.

The new plant will produce backhoe and small wheel loaders, which are among the products currently made at Caterpillar's Piracicaba, Brazil, facility. Once the new plant begins production, it will allow the manufacturer to increase capacity for other machinery.

Caterpillar is capitalizing on the region's relatively strong economic recovery during the past year. A rise in available credit has helped drive Brazil's domestic prospects with demand for automobiles and housing, enabling the economy to grow nine percent year-on-year in the first quarter of 2010.

The manufacturer also has incentive to replicate what it has already created in Piracicaba. The current operation has been instrumental in developing the Caterpillar Production System, a business process strategy that stresses quality and manufacturing excellence within the organization.



Brazil's economic recovery is clearing the way for global manufacturers such as Caterpillar to make inroads into the region.

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with Korea in 2007 as another step in an initiative to double American exports over the next five years.

UPS has supported the negotiation of a U.S.-South Korea Free Trade Agreement from the start, as more than one quarter of domestic exports to the country come from small and medium-sized businesses—a key shipper demographic for the package delivery company.

Specifically, the U.S.-South Korea Free Trade Agreement contains vital provisions for the express delivery industry, including enhanced market access and improved customs clearance times that allow carriers such as UPS to better serve their customers' global shipping needs.

China Looks to Consolidate Air Cargo Carriers

Following the announcement in early 2010 that Cathay Pacific and Air China would form a joint venture cargo airline, the Chinese government is now pushing for a merger of its three major airlines' cargo operations. It marks the country's latest move to produce stronger, internationally competitive carriers, and to create market stability.

The government has set up a team to work out details of a possible cargo merger between Air China, China Eastern, and China Southern. The proposed consolidation may jeopardize the Cathay-Air China cargo joint venture, which is still subject to final approval by the central government.

Foreign carriers transport approximately 70 percent of China's international air cargo, with the three domestic carriers carrying the remaining 30 percent. Any move toward consolidation would likely give the country's airlines impetus to seize even greater market share in the airfreight sector.

[1]

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Time to Reconsider Your 3PL Strategy

Third-party logistics companies come in many different forms, and for a while there was not much barrier to entry into the marketplace—particularly the less-than-truckload segment. Until even recently, the following recipe could be utilized to form a 3PL:

Ingredients:

<i>Freight to leverage</i>	<i>Growth potential</i>
<i>Industry knowledge</i>	<i>Technology—in any form</i>

Instructions:

1. Take one former carrier representative (or industry ancillary service provider), engage one freight account with whom you have a long-term relationship and bingo—you have freight to leverage.
2. Hang a shingle, perhaps obtain a broker's license, and you are in business.
3. Call your old carrier buddies (who left and went to other carriers) and start obtaining rates for your newfound freight. Ask them "Where's my volume discount?"
4. Optional: To look *really* smart, you take an old common rate base from the 90's, perform some "tweaking" to it, and call it your own with a slick name.
5. Find a way to perform freight payment—either on your own, or outsourced.
6. Lastly, run your clients' freight through your own books so it looks like your own—puff out your chest and exclaim that you are a multi-million dollar company. Buy low, sell high.
Voilà! You have yourself a 3PL.

While admittedly facetious, it is fact that carriers are not particularly fond of 3PLs—but they figure, "if we don't give them rates, someone else will." And so it went...

As a shipper who may be contemplating utilizing a 3PL, or perhaps evaluating your current 3PL relationship, you may be asking yourself, "What can a 3PL really do for me?" Let's examine the common thoughts regarding the outsourcing of your freight today—and explore best practices:

■ **Volume discount.** The 3PL will more than likely "have" more freight than you—hence the perception of receiving a volume discount and the likelihood that if you give your freight to the 3PL (that's right, you are giving your freight volume away) and add it to their other clients' freight, all will enjoy a greater discount. The problem is that carriers are currently re-evaluating *all* of their 3PL relationships right now and finding most of them unprofitable, and most are reducing their discounts and cutting off volume pricing.

Best Practice—Carriers can and will provide your company with

excellent pricing while eliminating the middleman. Keep your freight as *your* freight—have the carrier tariffs in your name by enlisting a 3PL that does not take ownership of your freight as their own, but can negotiate better discounts for you based on their volume and methodology—without taking yours, without accepting commission or "kick-back" from carriers, and utilizing any carrier with whom you would like to work (not just "their" carriers).

■ **Reduced Paperflow.** Outsourcing your freight activity should provide you with less paper to review (i.e. carrier bills). Nothing makes the blood drain from a 3PL's face faster than when a carrier inadvertently sends a bill directly to their customer, thus lifting the veil on the amount of mark-up on a particular bill.

Best Practice—Enlist a 3PL to automate your methodology, from the initial rate shop, pre-audit, all the way to the freight payment of each freight bill—using rates that are yours, and knowing exactly how much your 3PL is receiving for the service they provide.

■ **Technology.** 3PLs do not create technology—they have to buy it. They traditionally work off only one ratebase, because they cannot utilize multiple ratebases which are proven to reduce freight costs—and the old ratebases they utilize are not in synch with current network efficiencies of carriers. Basically, single ratebases are used because of outdated technology.

Best Practice—Ensure that your 3PL has not only technology available for you to rate shop and create bills of lading to actually execute your shipments using your rates, but can provide you with every piece of technology you need for your specific situation and supply chain. This would include inbound (vendor compliance) capabilities, small parcel, LTL and Truckload, International, Hazardous, real time KPI dashboards, etc., all while being able to integrate it inside your firewall.

Above all, never use only one common ratebase to rate your LTL. While many still use this old-school practice, it's a very costly idea—it benefits everyone but you, the shipper. You will be met with resistance, but persevere. Current carrier ratebases are developed with their operating efficiencies in mind. Make sure your technology can handle them and use them—they are free and you WILL get better discounts. Lastly, make sure your technology can track each shipment vs. your old methodology, which will ensure you "hero status" at your company.

By applying the above, you will essentially: **1.** Know that you will be getting better rates, and are **2.** Fully-automated and have full disclosure of exactly what you are paying, you can now **3.** Relax, because you will have the technology to ensure that you have made the best possible decision and can execute on your freight strategy.



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"Ferber Warehousing has been extremely innovative in implementing the latest in technology to streamline our operations," says Dianne Heath, vice president of business development. Ferber Industries has developed a total business distribution software solution called Conveyorware.com®, available for use by all clients. The Software as a Service (SaaS) solution is a proven, reliable, and error-free system offering seamless connectivity from their system to any web-enabled device (PC, smart phone, PDA). Clients can check inventory, order status, and enjoy stock reorder point notifications. The software sends clients and their customers e-mail notification of tracking numbers for each parcel shipment. All these features, such as bar coding, labeling, inventory control, material handling, and Real Time Order Management, are successfully handled by the sophisticated Conveyor® software. Conveyor® offers Ferber clients personnel time savers; manages their inventory, which is like managing money; and provides convenient shipping information. This is why Ferber Warehousing is different in the innovative ways they support their clients.

Weight Watchers praised Ferber Warehousing. "We are very happy working with Ferber Midwest. Their state-of-the-art computer-

ized system ensures that our promotional items are delivered quickly and error-free. They are always available to speak with, which helps when last-minute changes need to be made. They have done an excellent job with our distribution." Being flexible is how and why they survive and continue to thrive.

"We can support a small startup company, as well as established clients like Cabella's, Apple, Honda, and GM," Mr. Ferber reflects. "In today's economy, our customers tell us they want solutions that are more scalable and flexible, and that is what is bringing new opportunities to Ferber Warehousing."

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Mr. Ferber purchased the historic National Twist Drill building and founded the company in 1985. Today, it is a full-service warehouse, cross-docking, storage, fulfillment and distribution provider. This home-grown, Michigan-based company, headquartered in Rochester Hills on 33 acres, provides 500,000 square feet of storage. A second building, operating out of Madison Heights, is a 94,000 square foot facility with 25,000 square feet of office space and 69,000 square feet of warehouse space. Ferber Warehousing serves a variety of industries, including automotive, electronic, manufacturing, commercial, e-commerce, retail and beverage (alcoholic and non-alcoholic).

As Ann Allard of J & J importers of Wines of Distinction recommends, "Ferber Warehousing has been an outstanding partner for us! We rely on you for quick response and accurate fulfillment of our orders. You never fail to deliver. I prepare requests often and then make several changes, giving you very little time to process these orders. Ferber Midwest always responds, "No problem" and "We'll have it ready for you." On the rare occasion that there is a problem (usually due to some miscommunication on our end) you always resolve it immediately. We are so pleased with the service that Ferber delivers that we have recommended you to our distributor. Please extend our thanks to Dianne, Mr. Ferber and all the team members who "touch" our account behind the scenes."

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by Steve Sensing, Vice President and,
General Manager for Ryder's Hi-Tech/Electronics Vertical
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Value Added Services Bring Flexibility to the Supply Chain

Evolving consumer behaviors have dramatically impacted the way retailers deliver products. From clothing, to cars, to computers, consumers have gotten used to getting the custom product they want, when they want it. As consumer preferences have become more personalized and complex, retailers are asking their suppliers and logistics providers to step up to the plate. This means more customized orders, tighter delivery windows, and an increased focus on retail vendor compliance. Couple these factors with an economic recovery on the horizon—suppliers to retail will have to be prepared to deliver more products, with complex configurations, faster, and more often. As order to shelf cycles tighten, suppliers are looking for their logistics providers to help them keep inventories low, and fulfill orders at the last minute to better match consumer purchasing trends.

In order for suppliers and retailers to remain competitive in this changing environment, manufacturers can no longer allow products to be fully configured in Asia (or anywhere deep in the supply chain). This strategy creates the potential for lost sales and unwanted, aged inventory within the supply chain. A growing new strategy in the hi-tech/electronics industry is to postpone the customer specific configuration of the product as late in the supply chain as possible, increasingly at the third-party logistics provider's dock.

This trend is resulting in a new wave of Value Added Services that retail vendors and their logistics providers must be capable of providing. Let's use a hi-tech/electronics manufacturer as an example. The lines are often blurred between outbound finished good shipments from a hi-tech/electronics manufacturer and inbound orders for a retailer. This makes the work to ensure that the product is configured accurately—exactly the way the end consumer expects it—even more challenging. Many retailers have unique product configuration and shelf displays to differentiate them from their competitors. Consumers have very specific ideas of how a product should look and be packaged before they will make a purchase decision.

At Ryder, we offer several Value Added Services that solve this problem for suppliers. Ryder's customized systems enable warehouse operators to package finished goods inventory to match a specific retail order, helping to eliminate or avoid costly vendor compliance

charges, and increase retail customer satisfaction. Ryder's Value Added Services include kitting, bundling, and customization.

■ **Kitting:** Building advance "kits" to merge with Finished Goods improves speed to shelf. By pre-building kits of components (for example, HDMI cables or specialized remotes) for a flat screen television via a "drop in the box" process, retailers can deliver TVs to consumers with the latest technology and customized peripherals.

■ **Bundling:** Ryder can create unique combinations of components and peripherals to meet end customer demands at the shelf. For one electronics supplier, unique retail orders are delayed until the last minute prior to shipping, to allow the hottest printer and monitor combination to be bundled with the hottest laptop or PC.

■ **Customization and Packaging:** Ryder builds production runs of retailer specific configurations to meet changing demands of the end consumer, especially for special promotions of slow moving products to eliminate aging inventory. The customization and packaging process allows hi-tech and electronic suppliers to adapt to a very dynamic customer demand flow and improve bottom line performance by eliminating soon-to-be obsolete inventory.

Ryder's world-class execution of these Value Added Services is built on the company's Lean Guiding Principles and a deeply

ingrained lean culture. Lean warehouse operations are becoming increasingly important as suppliers have little room for waste or error. To accurately fulfill more complex, customized orders, the best logistics providers are integrating lean principles such as continuous improvement, standardization, and quality into their operations that service retailers and retail suppliers. Ryder's commitment to lean warehouse practices and the use of new technologies such as voice-to-pick, are helping to improve inventory accuracy, order fill rates,

shipment accuracy, and vendor compliance for our customers.

As retailers become more demanding, we'll see more top manufacturers maturing from discrete service outsourcing (Transportation Management, Distribution Management, and Dedicated Contract Carriage) to highly integrated solutions that provide end-to-end Value Added Services and technology solutions that create seamless handoffs and enhance customer satisfaction.



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IT MATTERS

by Joe Caston

Managing Labor Boosts Warehouse Operations

When up against competition, service is the name of the game, and your labor force is the most important tool you have to win business and increase profitability.

Labor management tools help you determine whether your workforce is able to perform at the level necessary to deliver cost-effective service to your customers. With the data and reports such tools calculate and generate, you can approach potential customers with numbers that demonstrate your ability to be a viable long-term partner.

STANDARDIZING MEASUREMENTS

Companies often leave labor force performance evaluations to the subjective judgment of managers or supervisors. Labor management systems help create performance standards that provide an objective frame of reference. Managers can use this data to offer incentives and training, evaluate performance, and make necessary personnel changes.

Engineered labor standards are a great way to measure performance. A labor management consultant can evaluate how long it should take to perform every task involved with the company's warehouse operations, such as the length of

time to pick a particular product type. Measuring actual operational results against these standards identifies areas for improvement.

SALVAGING A BAD MONTH

Knowing whether your warehouse is meeting your deliverables for the month is critical. Labor management systems can generate information on the fly, providing real-time visibility into warehouse performance.

End-of-month performance measurements don't allow managers to turn performance around to meet the current month's goals. Gauging activity mid-month allows time to remedy issues. Having instant access to information is a key factor in the process, and virtually impossible without automation.

An automated system provides a dashboard with key performance indicators designed to alert users when warehouse activity falls below or exceeds thresholds. If productivity dips, the warehouse manager can take immediate action.

Everyone has margin pressure, and providing good customer service at competitive rates is more important than ever. The warehouse has to operate as efficiently as possible. A labor

management system will evaluate a time period—whether a day, week, or month—and provide actionable data related to how efficiently work is being performed and whether the business is meeting revenue goals. For companies with multiple facilities, visibility into remote locations can be invaluable.

A PHILOSOPHICAL SHIFT

These may seem like relatively simple concepts, but they represent a philosophical shift for logistics providers who are used to concentrating on moving product, as opposed to measuring internal performance. Businesses using warehouse management systems may be able to add a labor management module—or may even have one they are not using. It is often the last piece of the IT equation that businesses implement, but with newer technology and real-time warehouse systems, labor management becomes a seamless interface that is relatively simple to learn.

Labor management may not be your company's first priority, but don't let it take a back seat. The sooner you start tracking your labor costs, the sooner you will become more efficient and competitive. ■



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VIEWPOINT

by Dr. Jim Giermanski

Digitizing the Global Supply Chain

At one point, we all had a rabbit-eared TV or a clunky cell phone that took muscle to carry. Numerous electronics innovations have made life not only easier, but also more productive. So why are so many international supply chain professionals still living in the dark ages when it comes to supply chain efficiency and security?

Is it the government, specifically U.S. Customs and Border Protection (CBP) and the Department of Homeland Security, that lacks modern supply chain savvy? Paper manifests, commercial invoices, and other hard-copy documents are still required for imported cargo, even with an e-manifest. We know paper documents can easily hide and distort a product's actual origin, especially if it is subject to quota. So why do we continue to use paper?

LESS THAN IDEAL SOLUTIONS

While the United States has implemented electronic data transmission requirements as part of regulations such as the Container Security Initiative's 24-hour rule and CBP's 10+2 importer security filing rule, these data filings are not ideal. In fact, they fail to identify the contents of containers destined for the

United States, because the electronic data comes from paper documents associated with the shipment, such as the motor carrier's bill of lading and commercial invoice, which indicate what *should* be in the container, not what actually *is*.

Even CBP's Customs Trade Partnership Against Terrorism (C-TPAT) does not require disclosure of the container's contents at origin. In effect, we still don't know what's in the container, and the paperwork does nothing to change that. Fundamentally, the global supply chain is still in the analog world, when the digital supply chain is available and more efficient.

A BETTER WAY

New digital-age smart container systems report what is in a container before it ever leaves origin. The process starts with an accountable person who physically verifies the actual cargo and quantity; identifies and reports the container number; arms and seals the container; and activates its monitoring systems to track location, internal condition, access, and movement from origin to destination. There, another identified accountable person opens the container to verify the cargo and quantity.

This process minimizes vulnerabilities, precisely predicts and controls arrival times, and accurately identifies cargo by holding an individual personally accountable and subject to company and/or government punitive action.

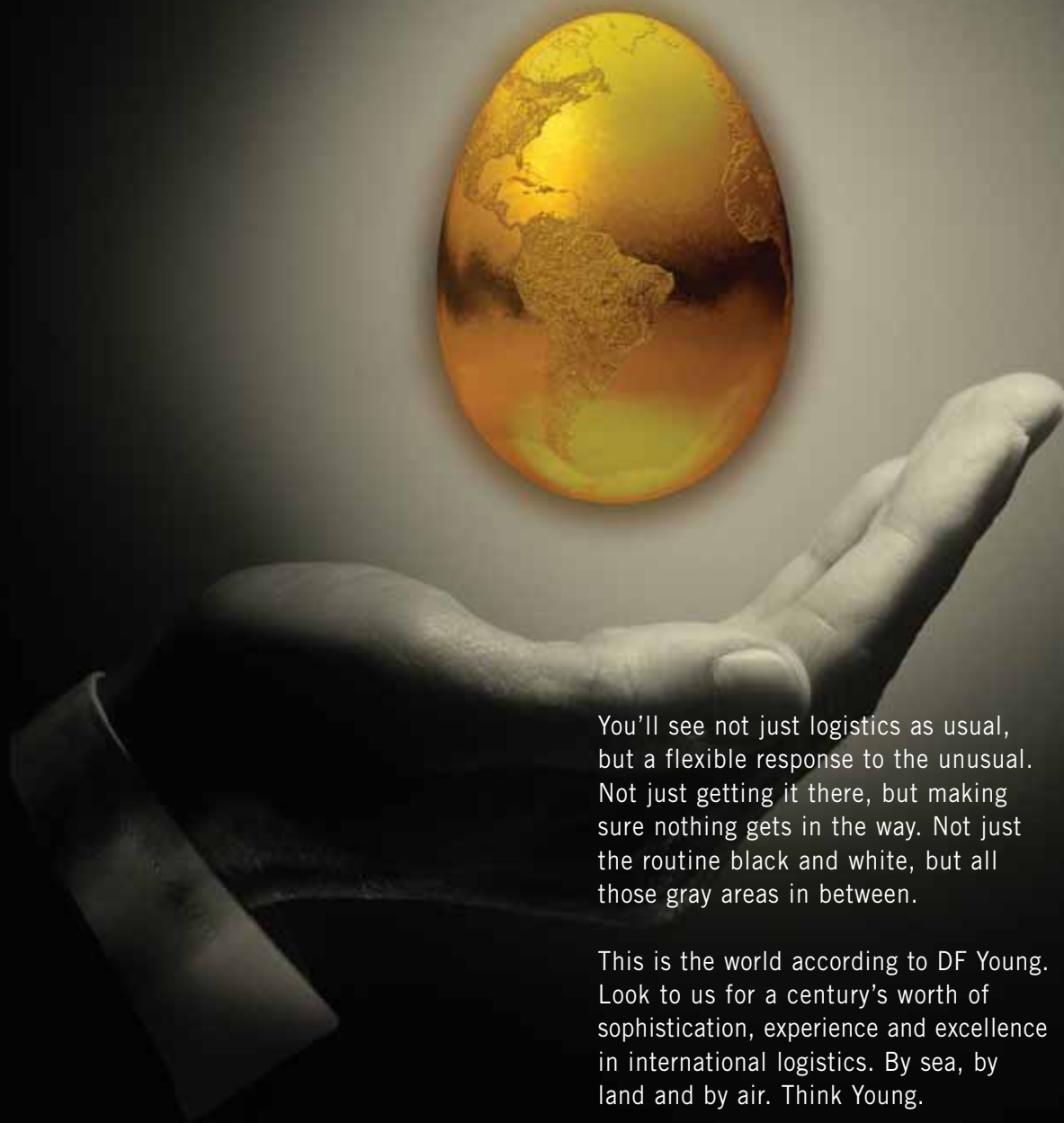
ON THE RECORD

Additionally, the electronically stored information (ESI) becomes part of the shipment record in the computer servers of the shipper, consignee, container security system provider, and appropriate Customs authorities as arranged, becoming a single, verifiable electronic record discoverable as evidence in both criminal and civil proceedings.

The ESI data can also provide significant protection for international shipper obligations under the United Nations' Contract for the International Sale of Goods.

So why are we still using paper documents? Paper, the analog TV, has no place in an HDTV, digital world. Global supply chain visibility and detail can only be achieved by modern electronic data transmissions that are already available and can reduce the costs of international cargo movement. It's time to go digital. ■

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SMART MOVES

EDUCATION AND CAREER ADVANCEMENT
by Jeffrey R. Brashares



How to Run a Logistics Job Fair

A stressed economy and tight financial market have forced downsizing and job cuts in nearly every industry. In the logistics sector, jobs have been disappearing at two ends of the spectrum. At one end, highly paid positions have been displaced in an effort to cut costs; roughly one executive position equals 10 operating jobs. At the other end, line operators have seen their jobs disappear as businesses collapse and companies downsize.

In Columbus, Ohio, as in many other cities, the sector's unemployment problem was not due to a lack of workers, but a lack of connections between employers and displaced workers. In an effort to solve this problem, the Columbus Region Logistics Council, a group operating under the direction of the Columbus Chamber of Commerce, applied an innovative approach.

In September 2009, the Council tapped its local network to invite displaced logistics professionals and hiring companies to a private, targeted logistics job fair. Twenty-five local companies and more than 250 logistics and transportation professionals attended, and many workers left with a job. Building on this success, the Council held a second

private job fair in March 2010 and plans to continue holding them biannually.

A sector-specific job fair is a strategy that other cities could easily replicate. Here are some success strategies.

■ Pinpoint key community partners.

By forming partnerships with a variety of local organizations, the Council was able to attract job seekers and employers to the event, offer skills-building workshops, and raise publicity.

The Council partnered with Columbus State Community College to host its first logistics job fair. This partnership provided a location for the event and a wealth of educated job seekers. The Council also relied on strong business ties to determine which companies were looking to hire and would be a good fit for this type of event.

The fair's content was enhanced through government and company partnerships. By reaching out to representatives from OhioMeansJobs.com, a jobs Web site created and sponsored by Ohio's governor, the Council was able to offer a seminar on how to use the Web site to locate jobs within the Ohio area. The Council also called on volunteers from local logistics corporations to give a lesson on job interview skills.

Understanding that word-of-mouth marketing is a remarkable avenue for publicity, the Council networked with community partners to raise awareness of its event. By joining forces with a local transportation law firm and the Columbus Chamber of Commerce, the Council promoted the job fair on these partners' Web sites at no cost.

■ **Timing is everything.** The Council took advantage of September as the beginning of peak retail season by inviting retailers to its first fair. This paid off for the retailers, which were looking for temporary labor to help staff catalogue call centers, as well as the job seekers, who had the opportunity to obtain a job that day if they were qualified.

■ **Get the ball rolling.** This type of project is flexible and can be adapted as necessary. To best match logistics professionals at all levels with open jobs in the marketplace, each fair must be updated to suit local needs.

It doesn't cost one dime to give back in this economy. With the proper backing and a convenient facility, you, too, can give workers in your local community the opportunity to reconnect with an employer. All it takes is a dedicated team and proper planning. ■

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CARRIERS CORNER

by Simon Kaye



Freight Forwarders: The Vital Link in Logistics Communication

Building a logistics system for today's sourcing needs requires a quantum leap from past shipping practices, in which companies too often neglected transportation in their strategic planning. A poorly constructed or outdated supply system with inadequate communication can create unnecessary delays and expense caused by information snags, missing or ill-prepared shipping documents, and inappropriate cargo routing.

One resource, however, can serve as the missing link in supply chain communication: a professional freight forwarder that represents the interests of all supply chain participants.

Here is what freight forwarders bring to the supply chain communication dynamic:

■ **Logistics understanding.** A freight forwarder should be familiar with the customs rules and regulations of every country through which freight will pass, in addition to understanding the associated service parameters and costs. Equally important is the forwarder's knowledge of Incoterms (the standard international shipping terms) and demonstrated ability to manage transportation, risk, and costs, and to

establish advantageous transport and delivery terms.

■ **Customer service emphasis.** From a door-to-door service backed by customs clearance, storage, and distribution to a straight one-off transaction, a freight forwarder should understand and adapt to meet shippers' needs. The objective is cost and time efficiency, with minimum downtime and as few obstacles to delivery as possible, complemented by maximum uptime for freight delivery.

■ **State-of-the-art technology.** Sophisticated online tracking technology is a must for a competitive freight forwarder. Shippers should receive protected system passwords for complete confidentiality, enabling them to access accurate real-time data about shipment location. Simply by entering a purchase order number, shippers should be able to see the whole picture.

■ **Global capabilities.** The best freight forwarders are an integral physical part of the global supply chain, with offices in centers of world commerce, such as New York City, London, and Hong Kong. Equally important, they should maintain a comprehensive global network of agents chosen for their expertise, rigorous professional standards, insight into

multinational standards, and enthusiasm for customer service.

■ **Professional certification.** Freight forwarders should meet ISO 9000 international process quality certification standards. They should also be approved to participate in cargo security programs such as the Department of Homeland Security's Customs-Trade Partnership Against Terrorism (C-TPAT) for global imports from any country, and the Transportation Safety Administration's Certified Cargo Screening Program (CCSP) for air cargo.

THE POWER OF PLANNING

When manufacturers, shippers, and freight forwarders work together, products move around the globe quickly, cleanly, and without loss, creating a supply chain with minimal inefficiency and maximum flexibility. Strategic logistics planning is the only way to make sure mission-critical supply chain factors don't get lost through poor communication, missing documentation, or disadvantageous shipping terms.

Proper logistics planning, executed through the services of a trusted freight forwarder, makes the process work and goes right to the bottom line. ■

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3PLLINE

by Jim Butts

10 Paths to Supply Chain Innovation

Leaders ask, “How can businesses be more innovative?” But successful innovation is rare. It requires hard work and creative thinking, and its value as an activity is often viewed skeptically. To move your business along the road to supply chain improvement, take a journey down the following paths to innovation.

1. Borrowing. Many of the past decade’s great innovations have not been applied within your industry. Find a practice that works in the financial sector, for example, but hasn’t been applied in supply chain management, and you are likely able to capitalize.

2. Variation. Take a concept such as “self-serve” operations and apply it to your business. What are you doing for customers that they could do for themselves? Also consider whether there are things that customers could be incented to do, or things you do currently, that customers might do for you.

3. Reversal. Outline a current process, then reverse it. Vendor-managed inventory is a classic example. It was once a retailer’s responsibility to manage inventory; now vendors do it.

4. “What if?” Ask what would happen if you had to design a new way of

serving your customers. Or what if you did not have your current infrastructure? The answers to these questions might surprise you—and might lead to some of your best innovations yet.

5. The best possible. Imagine the most ideal situations for your business. How would the best possible team perform? How could you establish the best supply chain?

6. Starting over. If you were redesigning your product or service, what changes would you make? Would those changes affect your personnel? Would they alter your competition? Would they change your customer base, locations, or resources?

7. Double your resources. What if you could spend twice as much? Where would those dollars go? What would you do, and get in return? This approach identifies those things you would do if you could, but often don’t.

8. Halve your resources. Allocation decisions define priorities. Budgeting is not an exact science, however, and this exercise defines needs versus “nice-to-haves.” This process will identify preconceived notions, erroneous assumptions, blind spots, and protectionism.

9. What would _____ do? Use a subject matter expert whose philosophy or approach is well-known. What would Warren Buffet do with your portfolio? What would he do with your company? What would Bill Gates do with your IT department?

10. Trading places. The success of effective people is generally not limited to specific situations; they develop ways to become effective in their circumstances. Skillful “trading places” allows you to practice adapting to situations. What would you do if you ran Berkshire-Hathaway? How would Microsoft be different under Buffet? This exercise involves identifying leaders’ principles, knowledge, traits, and abilities.

MORE THAN IMPROVEMENT

Supply chains have dynamic natures, multiple moving parts, and situational variables; they are ripe for innovation. Many firms hope continuous improvement will achieve supply chain goals.

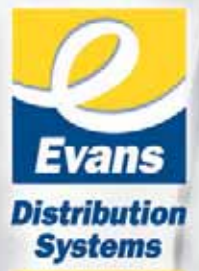
Continuous improvement, however, often will not establish competitive advantage. Rather, it may keep apace with the rest of the field. Leaders demonstrate that the surest path to competitive advantage is through innovation. ■

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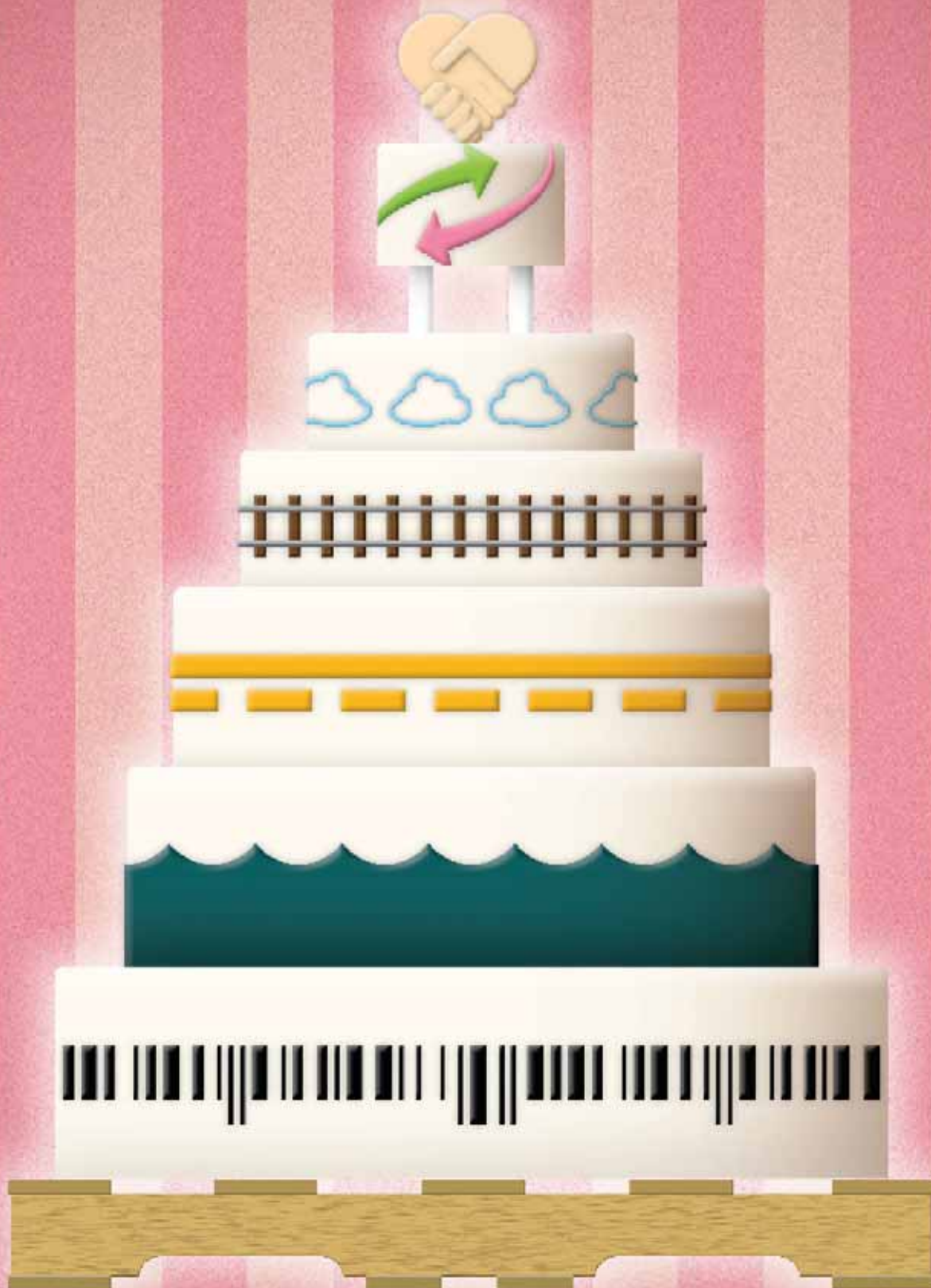
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Tying the 3PL Knot

by Perry A. Trunick

IF OUTSOURCING IS LIKE A RELATIONSHIP, IT'S PROBABLY A SECOND MARRIAGE. Both parties approach the courtship with caution, trying not to let emotion blind them to the facts while seeking to avoid past mistakes. That doesn't take away from the excitement of a good match, and some of the best outsourcing partnerships have thrived for years and continue to produce positive results.

Not to overtax the analogy, but good relationships, human or outsourced, result when the parties act simultaneously in their own best interests and in the best interests of the group. "That's really 'game theory,'" says Kate Vitasek, founder of consulting firm Supply Chain Visions Ltd.

Vitasek refers to a scene in the film *A Beautiful Mind* where Nobel Laureate mathematician John Nash explains a dilemma that is safer just to describe without comment. In a bar, Nash tells some male colleagues: "If we all go for the blonde, we block each other; not a single one of us is going to get her. So, then we go for her friends. But they will all give us the cold shoulder because nobody likes to be second choice. But what if no one goes for the blonde? We don't get in each other's way, and we don't insult the other girls. It's the only way we win."

The point is not about making a crude dating ritual more effective; rather that the best result comes when everyone in the group is doing what's best for himself *and* for the group. That's basically what third-party logistics providers (3PLs) and their customers answered when we asked, "What makes a good logistics outsourcing relationship?"

It sounds simple, but it isn't easy.

No outsourced logistics relationship is perfect, but many, such as the ones on the following pages, perform close to the Nash ideal and enjoy wedded bliss.



WELCH'S & WEBER DISTRIBUTION

Honest COMMUNICATION

Some potential outsourcers strike out when courting a 3PL because they don't prequalify suppliers; instead, they just blast out their requests. That indicates they are probably procurement oriented and merely looking for price, notes Carl W. Neverman, vice president of strategic accounts for Weber Distribution, a full-service 3PL based in Los Angeles, Calif. He prefers to be courted with requests that closely match Weber's service offerings.

Those types of specific requests indicate that the potential customer has thought about its needs before seeking a provider, and has spent some time examining the capabilities of 3PLs in the market.

As the "courting" process moves forward, Weber conducts its own due diligence. For example, Neverman quizzes companies that know the prospective client: Do they pay on time? What is the corporate culture? How have they acted in other outsourcing relationships? At the same time, he follows the conventional procedure of examining their financial stability, how often they change providers, and other key factors.

Matching customers with the right 3PL is not an exact science, admits Neverman. He has lost and gained business that has and has not fit Weber's model. But he is more aggressive about pursuing companies whose needs closely match Weber's service offerings.

As in any relationship, communication is a recurring theme between Weber and its prospective clients. When companies are open, and provide thorough information about themselves, it indicates they are serious about making a mutually beneficial 3PL relationship work.

An overabundance of information is a good start, but it is

important to link that data to future needs and goals, notes Neverman. Along with historical information, a view into some strategic goals helps Weber funnel that history into a company's changing needs and develop better solutions, alternatives, and contingencies.

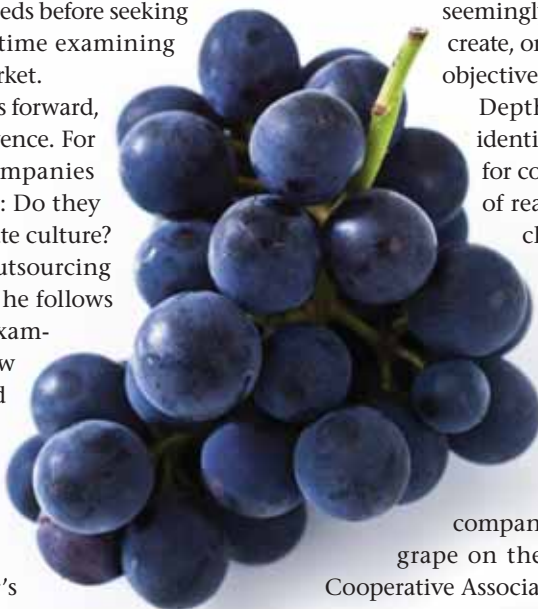
Access is another component of communication. Neverman says it is important that his group has access to all the "organizations" within the client company and to various levels of management. Full access helps avoid the seemingly endless problem of functional silos that create, or at least perpetuate, conflicting goals and objectives.

Depth in a client organization helps Weber identify opportunities and solutions, and plan for contingencies. A 3PL has to use that depth of reach cautiously when trying to influence change, "but it helps put a value on what you do," explains Neverman. "You have to take a holistic approach to how certain actions benefit all parties in the relationship."

FRUITFUL RELATIONSHIP

An example of a healthy partnership is the one Weber enjoys with Welch's, the company that singlehandedly put the Concord grape on the map. Owned by the National Grape Cooperative Association Inc. since 1952, Welch's refers to its 1,150 grape growers as its family. So, it's not surprising to learn the successful elements of Weber's relationship with Welch's: "Honesty; upfront communication on everything—the good, the bad, and the ugly; and openness, especially about future needs," says Neverman.

Knowing Welch's future needs has helped bring Weber into location optimization studies and facilitated efforts to reduce transportation spend. For instance, Weber offered a solution that combined some controlled and dry freight to



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optimize loads. Both products were being delivered to the same customer's mega distribution center. Weber identified the opportunity, then worked with various groups inside Welch's to develop the solution.

"Sometimes it's important for the client to sell a new idea to its customer and explain the mutual benefit of adjusting a process or procedure," Neverman adds. In the end, all parties benefitted. Weber improved its efficiency, Welch's achieved transportation cost savings, and both Welch's and its customer optimized delivery turns.

FOR RICHER, FOR POORER

Successful 3PL relationships are not just about storage or transportation rates, says Kevin Kilcoyne, senior manager of logistics for Welch's. When selecting a 3PL, he looks at the provider's financial controls, service, and technology.

Welch's sets its supplier contracts to expire at staggered intervals, which allows the company time to evaluate and prepare for a new contract cycle. Staggering expiration times also avoids having all contracts come due at once. Requests for quote (RFQs) are fairly standard at Welch's, but the company does review and adjust them to account for new conditions and developments, says Kilcoyne.

Because Welch's uses multiple 3PL partners, several factors drive the selection process:

■ **PRODUCT TYPE.** Does the 3PL handle ambient temperature or frozen goods?

■ **GEOGRAPHY.** Does the 3PL maintain regional facilities based on where Welch's wants to warehouse and distribute products?

■ **SERVICE.** How does the 3PL perform based on product availability? Are products picked and ready to ship on time? Partners who also provide transportation are measured on on-time shipments and other delivery metrics.

■ **TECHNICAL CAPABILITIES.** While Welch's evaluates a 3PL's systems, EDI, and inventory control metrics, it also places great emphasis on IT personnel. In addition, strong reporting capabilities for

cycle counts and inventory control metrics not only help Welch's track supply chain activity, but also identify opportunities for improvements.

When Welch's strikes a deal with a 3PL, it doesn't just lock away the contract in a drawer and forget about it. The company has established provisions for re-bids, competitive rates, and other opportunities to take advantage of market conditions.

"But that isn't just an opportunity for Welch's," notes Kilcoyne. "The long-term relationship with Weber

us and our other partners," he says. "That has been extremely beneficial and allowed us to drive inventory reduction, consolidation, and freight rate savings.

"Creativity, trust, stability, and knowledge of our business are all important characteristics of a beneficial 3PL relationship," Kilcoyne adds. "The communication and close connection to each others' business helps both partners keep changing, improving, and finding new opportunities."

In this environment, the 3PLs grow comfortable bringing solutions to



A successful 3PL partnership marries Weber's temperature-controlled pool distribution services with Welch's demanding supply chain needs.

Distribution and other 3PLs enables us to come to the table early within a contract to restructure the size or scope of the business and present opportunities."

Flexibility is an important characteristic for any 3PL Welch's partners with, says Kilcoyne. He cites an example where Welch's brought a few of its 3PLs together to identify some shipping opportunities, such as co-mingling products and linking distribution networks to take advantage of cost savings.

"Our 3PLs are not afraid to work with

Welch's, including those that might involve one of the 3PL's other customers. "While we're pushing initiatives from our perspective, our 3PLs challenge us with new opportunities and ask us why we wouldn't pursue them," Kilcoyne says.

"We want to be as market competitive as we can, and take every penny out that we can, but we also realize our partners have to be profitable," he adds. "While we maintain a business relationship with our 3PLs, we also look at it as a partnership." Or a marriage.

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A photograph of an elephant and a car on a dirt path in a savanna. The elephant is in the foreground, facing away from the camera, with its trunk slightly raised. A dark-colored car is in the background, facing the elephant. The scene is set in a dry, grassy area with some trees in the distance.

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HUNGRY FISH & KENCO LOGISTIC SERVICES

A Non-Traditional RELATIONSHIP

A new startup and fast growth in a down economy sounds like the stuff of legend. Hungry Fish Media might become that legendary company that moved from producing and distributing one product to creating and running effective online campaigns for many products. But to earn its legendary status, it had to do logistics outsourcing right.

Hungry Fish co-founders James Sietstra and Daniel Wallace did their research, looking for an opportunity to apply their online marketing skills. They found it in the sports supplement segment, where they began promoting and selling Force Factor, a strength and endurance supplement.

On their first day in business, “we had two sales and neither was profitable,” recalls Sietstra. Undeterred, the two partners kept driving their marketing campaign.

Phase 1 included manufacturing and fulfillment, along with their core strength in online marketing. But as the business grew, the Hungry Fish founders focused on the areas where they could perform well and where control of a function would help them make improvements. That’s one reason they opted to build an in-house call center. It allowed them to stay close to customers and implement improvements faster. At the same time, they elected to outsource fulfillment.

Initially, Hungry Fish used two smaller companies for fulfillment. Distribution was an area where they didn’t feel they had the strong skills and ability to make continuous improvements, so they outsourced it. Their rapid growth soon outpaced the capabilities of their fulfillment service providers and it was time to look for a logistics partner.

True to their own model, they started

their search for a 3PL online. While it may sound a bit like speed dating, there was more to it, Sietstra explains. The company, which launched its first product in April 2009, was starting to feel the pain of its rapid growth by the end of the year. No one in house had supply chain experience, but the problem areas were clear.

The two fulfillment companies had done an adequate job, but neither they nor Hungry Fish had anticipated the speed of the company’s growth. In addition to the success of its online campaigns, Force Factor had attracted the attention of brick-and-mortar nutrition retailer GNC. Force Factor was the most searched-for-and-not-found supplement on the GNC Web site, leading GNC to investigate the product and its supplier. That led to an exclusive deal with GNC, and Hungry Fish had a new Force Factor distribution channel to deal with.

Processes and inventory management were also showing signs of strain. Force Factor now required a national distribution network. And some of its technology solutions had become “clunky.”

With their needs defined, Hungry Fish culled through prospective suppliers by looking at their Web sites. They analyzed the scope of the service offerings, the capabilities of the companies, existing customer base and industry experience, and customer experiences. The list of prospects grew shorter.

As they narrowed the prospects further, the Hungry Fish crew talked to industry sources to learn more about the reputations of the providers and to gather information about direct experience those companies had with the various 3PLs.

Hungry Fish didn’t prepare a formal request for proposal, but it asked its



Healthy sales of nutritional supplement Force Factor drove Hungry Fish into the arms of a 3PL.

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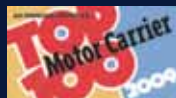
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short list of 3PL prospects to respond to its needs.

Working through the process, Kenco Logistic Services, a 3PL based in Chattanooga, Tenn., responded to Hungry Fish by asking questions and drawing out more detail about the operation and its needs. Both Sietstra and Wallace agree they were impressed with Kenco's Judy Craig, who was willing to keep asking questions, and to explain logistics and make recommendations.

"Character counts," says Sietstra. Hungry Fish and Kenco began to build a comfort level and some trust through the RFQ process, and so a match was made.

The open and easy interaction continued, according to Sietstra and Wallace. Inevitably, an operational problem did occur, which led to an internal discussion at Hungry Fish. They highlighted the importance of the issue to Kenco and offered to support a solution. Operations at Kenco responded within



When courting a new 3PL partner, "character counts," says Hungry Fish co-founder James Sietstra.

24 hours with solutions and a backup to avoid any recurrence of the problem. "This type of communication was very effective," says Sietstra.

Asked what advice they would offer

to others who are considering an outsourced logistics relationship, the Hungry Fish founders suggest that 3PLs pay attention to their Web sites. With more people using digital information as an important part of their research, a quality Web presence is crucial.

They also remind prospective 3PL users, that "character matters in business; people show you who they are pretty quickly." They place significant importance on communication and add the need for proactive solutions.

Hungry Fish Media is continuing to focus on its core strengths and develop new opportunities in online marketing. Sietstra and Wallace acknowledge that part of their decision in selecting a 3PL partner was driven by the need for national coverage. But going forward, they are also looking for scalability so the 3PL can keep pace with their growth. That includes being a pivotal link as the company grows into new geographies and markets.

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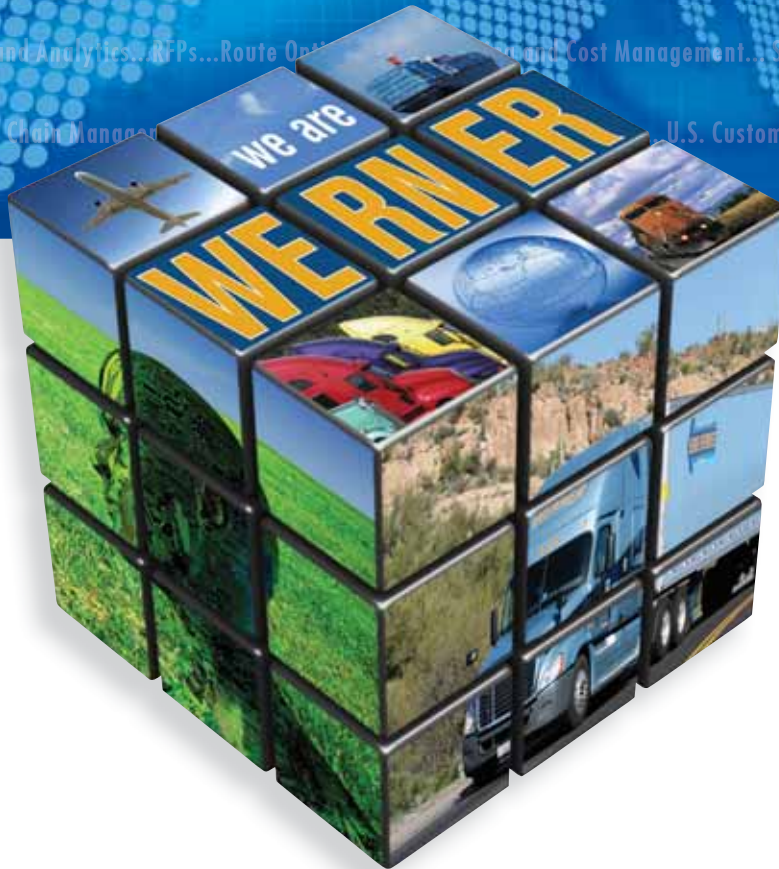
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FOSCARINI & GEODIS WILSON

Cross-Cultural BLEND

Making a match across broad geographies involves more than speaking a common language; it also requires an appreciation of the cultural differences that influence the relationship. For Italian lighting designer Foscarini, it was starting small in the U.S. market that made finding a 3PL partner more difficult.

Foscarini's experience with outsourcing extended all along its supply chain. The company's strengths lie in innovative design and delivery of special lighting fixtures. Because it

from his customers—the dealers and buyers. “We wanted to improve our connection both ways—getting to know the market and the market getting to know us,” he says.

Foscarini carries large inventory volumes in the United States because its service levels won't tolerate the three-week transit time to deliver product from Italy, says Urbinati. It started out using two forwarders to handle transportation, but Urbinati grew increasingly dissatisfied with their quality and service.

“We're a small company, and we need to be flexible and efficient to deliver a near just-in-time service to U.S. dealers,” he says. “It was illogical that we couldn't get the high service levels we enjoyed in Europe.”

The logistics problem in Europe is very different from the United States, notes Urbinati. In Europe, 65 percent of Foscarini's orders come in through its IT system. Dealers who are pre-approved for credit place orders electronically, and operations that do not require a human value-add are performed automatically.

“Ordering in Europe is quicker, more efficient, and error free,” Urbinati says. “And the system is always working for the dealers, even at night or on Christmas Eve.”

LONG-LOST PARTNERS

Luca Baldoni, account manager for global freight management company Geodis Wilson, had called on Foscarini a few years ago when he worked for another logistics company that did not offer 3PL services. When he joined Geodis Wilson, he contacted Foscarini again, and found the company receptive.

Today, Geodis Wilson is working with Foscarini to develop a Web portal system in the United States that clones the system it uses in Europe, says Baldoni. Dealers who are pre-cleared and have a credit history can log on to a Web portal and place their orders. The orders are automatically approved and electronically transferred to the Geodis Wilson warehouse in New Jersey, where workers pick, pack, and ship.

This system gives the dealers—and Foscarini—complete



Italy-based Foscarini focuses its talents on designing innovative lighting devices, and boxes up logistics for the third-party experts.

outsources production, Foscarini is not tied to any particular sourcing location or manufacturing facility.

It makes sense for Foscarini to use a 3PL, especially in the United States, explains Carlo Urbinati, the company's managing director. Foscarini entered the U.S. market four years ago through a distributor, but Urbinati didn't like being so far

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When establishing themselves in the U.S. market, many global companies get hitched to third-party logistics providers such as Geodis Wilson to handle their inventory management and warehousing so they can avoid making any capital investments in the country.

visibility, and operates “hands-free,” even while the Italian offices are closed for summer vacation.

Although Foscarini’s U.S. business continues to grow, the company does not locate employees in the United States. It is not uncommon, however, for Geodis Wilson to provide office space to visiting teams who might come over temporarily to work on a project.

“It may not sound like much,” Urbinati says, “but it saves us the hassle of locating a temporary office and negotiating a short-term lease.”

Many companies break into a new market this way; maybe adding a small sales office, but typically not operating their own facility. Baldoni cites the example of one global company that established itself in the United States, then decided to perform its own logistics services. It bought a facility when the market was bottoming out, and saved a substantial sum on the purchase. “But, the facility has sat empty

for the last two years,” Baldoni notes.

The problem for Europeans dealing in the U.S. market, says Baldoni, is that Europe has higher quality products, with lower quantities. The United States is the opposite—lower quality products with higher numbers.

“If a European company doesn’t move one million units a year, some 3PLs won’t even consider meeting to discuss a possible solution and partnership,” Baldoni notes. “Many U.S.-based 3PLs are driven by numbers and want to fill their distribution center space.”

It’s a cultural difference, he adds. “Whether the European firm moves \$4,000 coats or discount shirts, it’s still a \$4 transaction for the 3PL.”

BUILDING A RELATIONSHIP

Foscarini wanted an integrated solution where dealers would be able to check availability, place orders, and view delivery times. This is working well in Europe and helping to position

the brand with distributors there, says Urbinati. The partnership also matched Geodis Wilson’s goal of attracting customers who were looking for integrated solutions, rather than mere pick/pack transaction capabilities.

While each 3PL relationship places unique demands on its partners, some consistent qualities are the hallmark of successful partnerships. Communication heads the list, starting with the prospecting stage and continuing throughout the relationship. Importantly, communication has to flow both ways. That requires trust and openness—both of which are earned over time.

For a new relationship, reputation counts. Networking with other outsourcers to determine a 3PL’s reputation becomes part of the selection process, along with formal information gathering on company size, capabilities, financial stability, and customer references.

Happily Ever After?

Unlike marriage, successful outsourcing relationships also include formal measurements. Keeping score and discussing and correcting problems and weaknesses with your 3PL may help strengthen the relationship. It could produce the opposite effect with a marriage partner, so with the caveat not to take the marriage analogy too seriously, don’t forget to celebrate a successful 3PL relationship with your partner if you want to continue to enjoy happy anniversaries.

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FACING LOGISTICS CHALLENGES? USE IL'S 3PL EXPERTS AND

3PL PERSPECTIVES

2010

A PARADOX BOUND BY DEMAND

by Joseph O'Reilly

Perspective is a weighty word, burdened by limitations. Alone it is siloed, rigid, biased, and exclusive. But give it plurality and perspectives become rich with relevance. Contrasts emerge, tensions arise, commonalities come together, and facts are enforced.

Inbound Logistics' annual *3PL Perspectives* research report follows similar logic, coupling shipper and 3PL insights to illustrate the rapidly changing dynamics of the outsourcing industry. Our "feel" for the third-party logistics space offers give-and-take perspectives of what shippers demand, and how logistics service providers respond. We take these parts, integrate them, and provide a complete view of the market.

Sourcing multiple perspectives offers deep supporting evidence, enhances clarity, and creates stronger analysis supported by fact. It's why businesses embrace 3PL partnerships to begin with.

Outsourcing's value is built upon a fundamental presumption that strength comes in numbers – that best-of-breed logistics providers or an end-to-end integrator, sometimes both, give shippers greater visibility to supply chain challenges than going it alone. Its success is driven by a collective synergy that tears down walls between functional silos, pulls together disparate parts, and creates an integrated network bound by demand.

July 2010 • Inbound Logistics **81**

3PL

PERSPECTIVES

2010

Reflecting how unique market circumstances have twisted and torqued supply chains, how innovations in technology, the Internet, and business process strategies have facilitated the movement of information and inventory around the world, and how outsourcing has gained widespread traction, the third-party logistics industry has become somewhat of a paradox. Businesses rely on logistics providers as fixed assets, fundamental partners that strengthen and support the enterprise. At the same time, 3PLs are fluid, flexible, even fleeting. It's a matter of perspective.

There are constants that draw shippers to outsourcing: eliminating costs and creating efficiencies, divesting non-core business functions, and allaying risk. There are also variables: exploring emerging markets, piloting innovative technologies, experimenting with new supply chain strategies. Often that which remains the same, and everything that changes, feed the business case for outsourcing. In good times and bad, however demand dictates, 3PLs learn, evolve, and respond.

Inbound Logistics' annual *3PL Perspectives* market research report and Top 100 3PL directory offer similar yin and yang viewpoints that together coalesce into a comprehensive study of the third-party logistics industry.

First, *Inbound Logistics* solicited nearly 600 third-party logistics service providers to provide detailed information about their services and areas of expertise—geographically, operationally, and vertically. We also asked 3PLs to color this data with contextual insight about business during the past year, relationships with customers, and emerging outsourcing trends. We combined this pool of information with more than 4,000 targeted shipper responses, creating a foil for our

analysis—another perspective.

From this sweeping overview of the 3PL industry, we concentrate our focus on the Top 100 3PLs, as selected by *IL* editors—a composite of logistics service providers, from the venerable old guard to a new crop of industry leaders, all of whom are pioneering outsourcing excellence.

Collectively, *3PL Perspectives* and the Top 100 3PL directory marry industry analysis with nuts-and-bolts information about leading logistics service providers. Outsourcing trends are often fleeting but 3PL trendsetters are hard and fast. Welcome to this year's paradox.

DIVERSIFICATION BEARS POSITIVE GAINS

Even as global market conditions swing the supply/demand pendulum in arbitrary directions, forcing businesses to quickly adapt and respond, 3PLs have remained relatively stable—a quality that plays into outsourcing's favor. There have been some notable acquisitions and contractions, and asset-heavy providers have faced their fair share of difficulties in a soft market, but the industry's counter-cyclical resilience remains consistent with last year's report. The outsourced logistics segment is still on solid footing, with gross sales revenue topping out at \$107 billion in 2009, compared to \$112 billion last year, according to *3PL Perspectives* research.

For many industries, 2009 was a bear market with bare returns. Widespread pressures to reduce costs and manage uncertain demand pushed businesses to lean less on inventory—at the risk of replenishing overstock—and more on third-party logistics partnerships.

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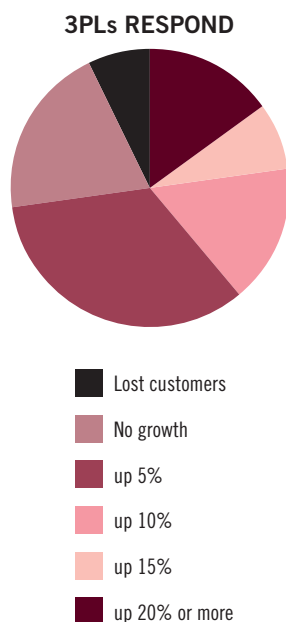
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3PL PERSPECTIVES

2010

FIGURE 1 During the last year, how much did your customer base grow?



SOURCE: Inbound Logistics 2010 3PL Perspectives

volumes, 3PLs report a slight increase in new customers this year, with 73 percent building their client rosters by at least five percent, compared to 70 percent in 2009 (SEE FIGURE 1). On average, service providers indicate a seven-percent increase in new customers, compared to 6.7 percent last year. By contrast, only seven percent cite business attrition (11 percent in 2009).

3PLs are leaving few links untouched in their search for new customers. Manufacturing remains the Holy Grail for outsourcing demand—but only by mere percentage points—with 96 percent of surveyed 3PLs targeting this market. Distribution/wholesale (also 96 percent), retail/e-business (88 percent), and service industries/government (75 percent) follow accordingly.

That distribution/wholesale has for the first time reached the same level of saturation as manufacturing indicates logistics intermediaries have found solid traction between supply and demand. It suggests 3PLs are cherry-picking business opportunities through existing retail and manufacturing customers, wending their way upstream and downstream in the supply chain, and targeting other third parties as potential prospects.

Service industries and government have consistently been laggards in terms of outsourcing progressiveness. But that tide appears to be turning, with an eight-percent jump in the number of 3PLs selling their services to these sectors.

Finding new customers enabled third-party logistics providers to spring from a prolonged recession relatively unscathed. Respondents to *IL's 3PL Perspectives* study indicate a slight gain in sales and profitability during the past year, each registering 5.9-percent growth on average, up 0.6 percent

over 2009 numbers. Still, compared to 2008, when mean sales growth topped 11 percent and profitability almost eight percent, the industry is far from pre-recession normalcy.

Under-performing 3PLs broadly cite diminished customer volumes and price pressures for static growth. Clients pulled back inventories to lower carrying costs; as a result, there was less business in the pipeline.

"Profit margins were compressed, and not as high as expected due to volatile pricing from carriers and brokers alike. We had to keep profits lean to keep competition out," reports one 3PL survey respondent.

Recognizing that sales growth was limited by economic constraints, many third-party logistics companies explored opportunities to grow business beyond their cores, either by diversifying their customer demographic and/or expanding logistics services in these verticals.

For some 3PLs, it was a coordinated strategy to expand business through widespread sales outreach. Others made a concerted effort to amplify existing customer partnerships, for example, targeting vertical markets with differentiated services.

"We centered our sales and prospecting efforts on three market verticals combined with a focused outreach to existing and past customers/prospects," reports another logistics company. "After six months of employing this marketing and sales strategy, our customer base grew by 14 percent."

Similar to last year, 3PL respondents acknowledge that "rising costs" (50 percent) is the greatest challenge they face today. Notably, "technology investment" (46 percent) and "capacity" (44 percent) follow in terms of priority, displacing "finding customers" and

(continues on page 88)

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3PLs Up Close & Personal

The 3PL industry is well balanced between asset- and non-asset-based service providers. Of surveyed companies, 49 percent operate as non-asset-based service providers, with 51 percent identifying their business as either asset-based or both (SEE FIGURE 2).

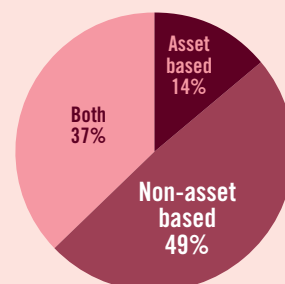
Over the past few years, slight fluctuations in the number of purely asset-based companies—14 percent in 2010, 16 percent in 2009, 12 percent in 2008—reflect changing 3PL pedigrees.

For example, some service providers have divested equipment or spun off separate non-asset logistics operations; and technology companies are bundling value-added services around software applications. At the other extreme, carriers and warehouses are expanding their operational taxonomy with logistics capabilities. There are few bounds from where 3PLs emerge, or where they are evolving.

The U.S. 3PL industry remains American to the core with 88 percent serving North America and 15 percent exclusively the United States (SEE FIGURE 3). Asia is the top off-shore target (48 percent), followed by Europe (46 percent), Southeast Asia and Latin America (42 percent), and the Middle East (37 percent). In spite of a global recession, and perhaps as a consequence, companies are leveraging third-party penetration in offshore markets to capitalize on emerging sales and manufacturing opportunities.

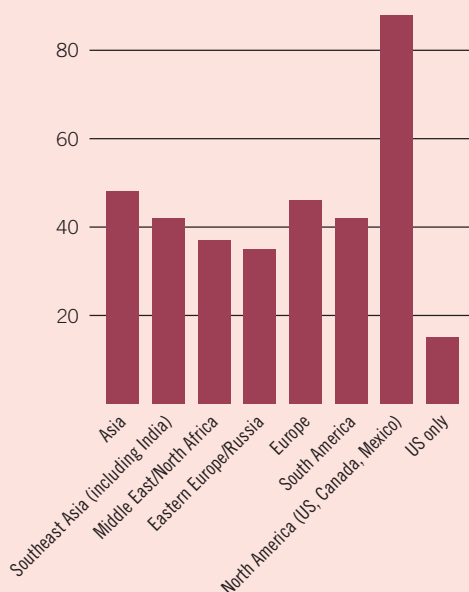
In terms of vertical specialization, consumer product goods and food and beverage are the likeliest outsourcing targets—with 81 percent and 72 percent of 3PLs tailoring services to these industries (SEE FIGURE 4)—followed by electronics (66 percent), automotive (62 percent), construction and building materials and footwear/apparel/textile (both 60 percent). Generally, 3PLs find greatest traction in customer-facing verticals that are sensitive to demand, as well as complex manufacturing industries where global sourcing is fractured and widespread.

FIGURE 2 Asset or Non-asset based?



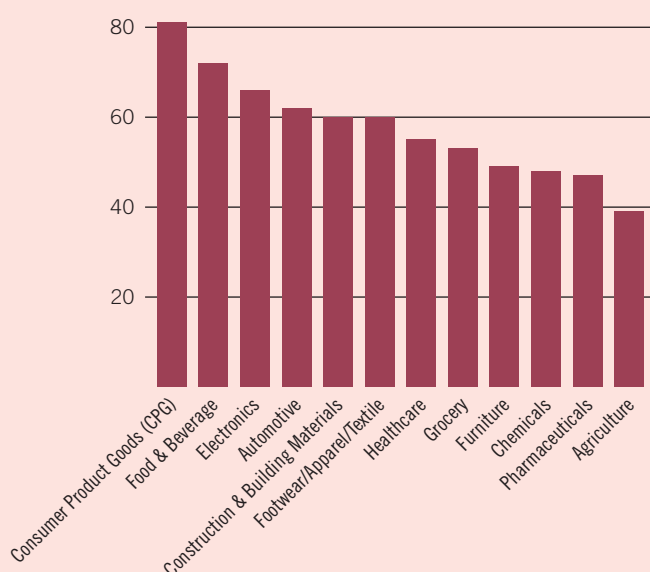
SOURCE: Inbound Logistics 2010 3PL Perspectives

FIGURE 3 Regions 3PLs Serve



SOURCE: Inbound Logistics 2010 3PL Perspectives

FIGURE 4 Vertical Specializations





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(continued from page 84)

“making a profit”—which rank fourth and fifth this year (SEE FIGURE 5). What does this mean?

Even as 3PLs cast their nets far and wide for new prospects, they are baiting customers by adding and expanding value. Service providers are profitable because they are helping shippers save money, then sharing in

those gains. This trend corresponds with aggregated data from *3PL Perspectives*.

Nearly 80 percent of respondents cite organic sales as contributing to growth, with 20 percent indicating organic sales and mergers and acquisitions, and only one percent reporting M&A alone as a factor.

By investing in technology and securing capacity, 3PLs are looking at how they can position and match their value proposition to future demand. It’s an impetus that naturally drives organic growth.

TOOLING UP WITH LOGISTICS IT

From a macro perspective, many logistics companies anticipate a capacity shortage if shipment volumes recover without a corollary rebound in new equipment. Transportation costs will accordingly rise.

On a more granular scale, 3PLs recognize that investments in technology provide greater operational and sales leverage as they expand their value proposition beyond traditional commodity-type services—helping shippers address rising costs and capacity constraints, then probing strategic solutions. “It’s about taking a supply

chain approach rather than simply a transportation one,” a 3PL reports.

Technology is one area where logistics service providers have been concentrating investment. Apart from identifying it as a priority within their industry, 42 percent of 3PLs report that technology strategy and implementation is a concern for their customers as well (SEE FIGURE 6, pg. 90). Interestingly, shippers don’t feel the same way—only 18 percent cite technology as a concern.

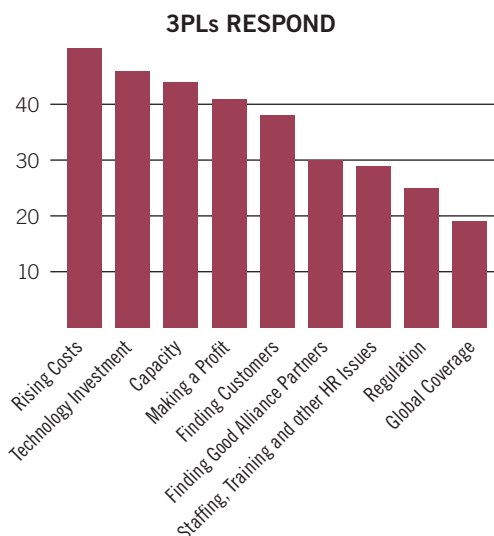
In a down economy, outsourcers rely on service providers to offer these types of solutions. Moreover, the technology play gives 3PLs yet another channel to grow partnerships with customers and build even greater value around existing transportation and logistics services. The lines separating 3PLs and logistics IT vendors are quickly dissipating; but intermediaries are gaining advantage by blurring these distinctions, largely because they can execute beyond the technology piece.

Many non-asset-based service providers specifically buttress their value proposition with logistics IT capabilities, either partnering with solution software vendors, or developing their own proprietary systems. That said, the evolution of Software-as-a-Service (SaaS) and on-demand solutions has lowered the barrier of investment for 3PLs across the board—asset- and non-asset-based, large and small.

Network-based access to plug-and-play logistics solutions allows 3PLs to sidestep costly implementations and continually provide updates. Alternatively, these deployments provide customers with greater flexibility to modulate between à la carte IT functionalities rather than acquiring soup-to-nuts solutions.

As if shippers needed any more

FIGURE 5 What are the most important challenges 3PLs face today?



SOURCE: Inbound Logistics 2010 3PL Perspectives

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incentive to follow 3PLs into the technology market, some logistics providers are luring prospects with “free” solutions – a managed TMS service, for example, that offers software pro bono in exchange for revenue gain share.

Broadly, electronic data interchange (EDI), visibility solutions, and Web enablement are compulsory for 3PLs today, with 97 percent, 90 percent, and 88 percent offering these respective capabilities. Customer relationship management/supplier relationship technologies (68 percent) and wireless/RFID solutions (64 percent) are gradually gaining traction.

In terms of specific logistics IT investments, 3PLs are fixed on three core areas: TMS (76 percent), optimization solutions (60 percent), and WMS (58 percent). Each represents a critical need for shippers looking to optimize

essential transportation and warehousing functions, then everything in between.

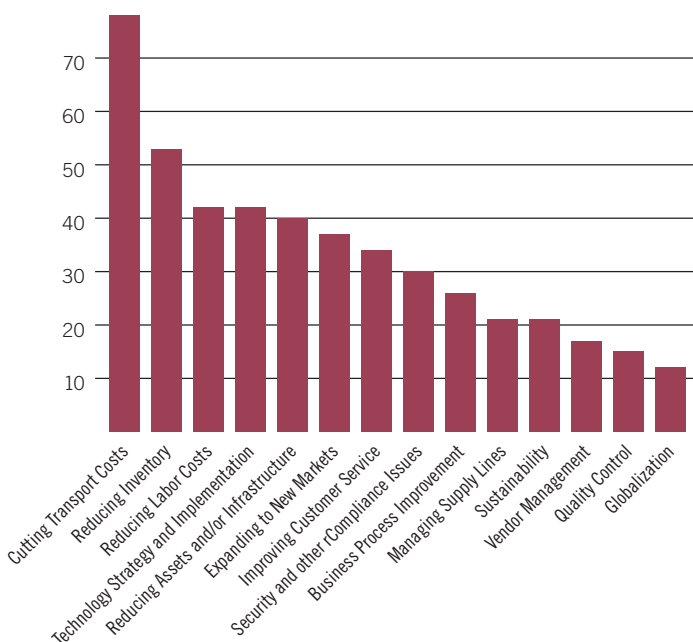
Also worth noting, 40 percent of 3PL respondents indicate interest in freight payment/claims/auditing solutions, once primarily a mainstay in the logistics technology space. Beyond the technology, 54 percent of 3PLs offer payment auditing/processing services. Demand for molecular-level detail, clues to where inefficiencies are bleeding costs, gives 3PLs greater control as solution providers, addressing tactical pain points and prescribing strategic fixes.

TAKING STOCK OF INVENTORY

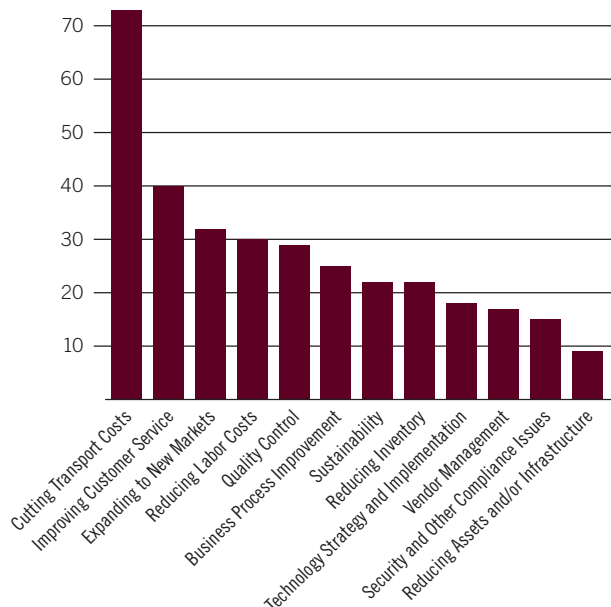
If one area required this level of functional doctoring in 2009, it was the warehouse. With transportation capacity expectedly soft, many

FIGURE 6 What are shippers' top challenges?

3PLs SAY

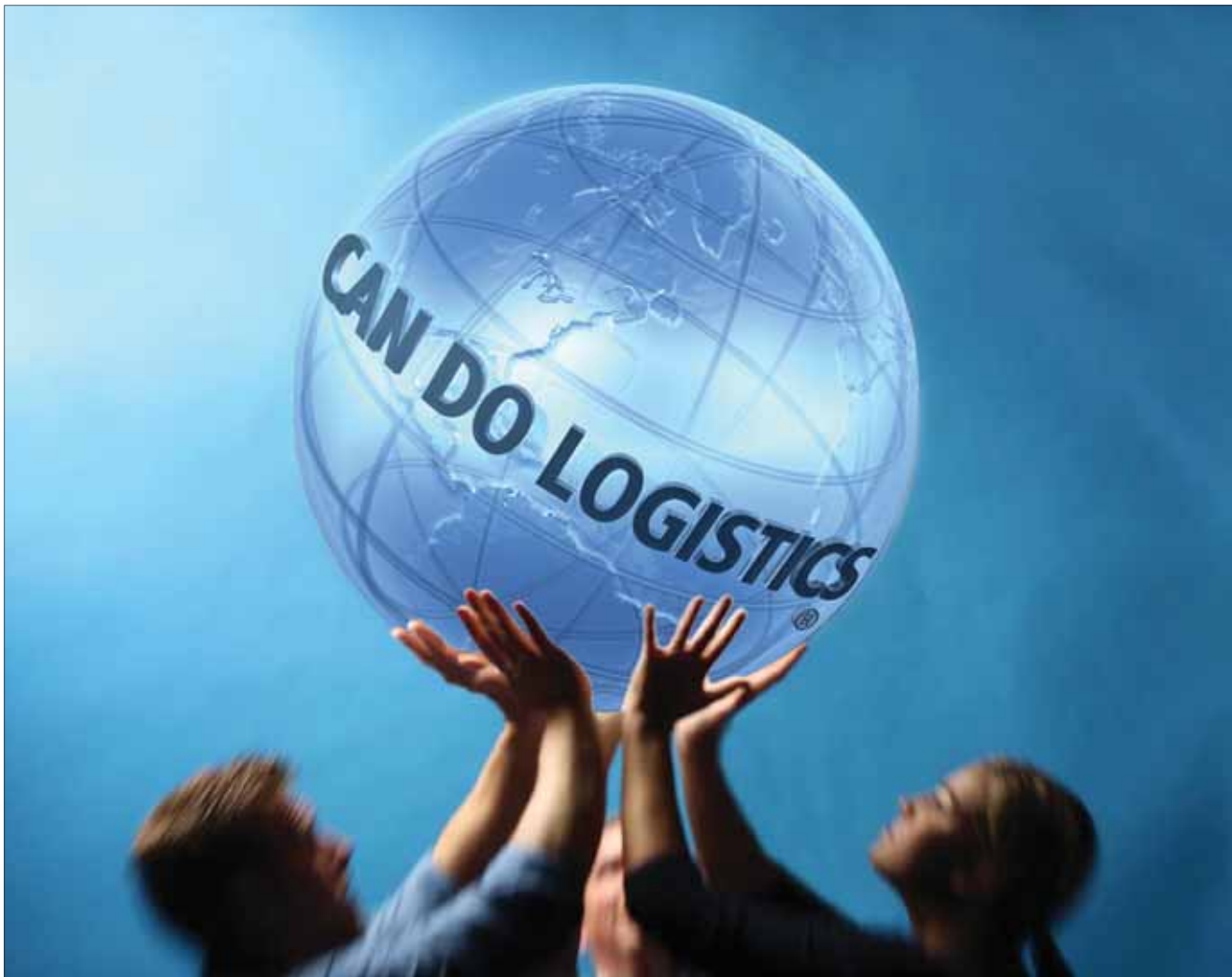


SHIPPERS SAY



SOURCE: Inbound Logistics 2010 3PL Perspectives

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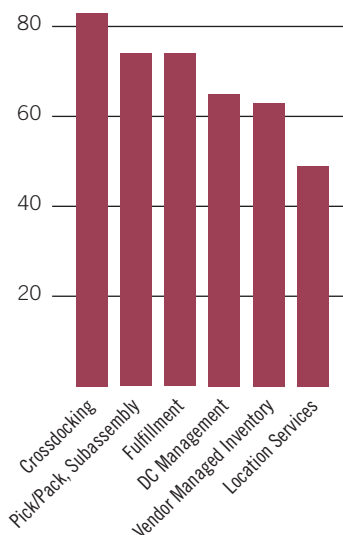
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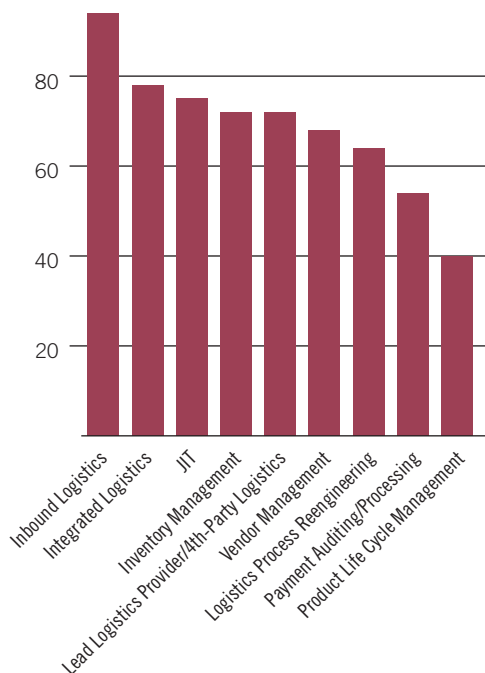
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FIGURE 7 Warehouse Services 3PLs Offer



SOURCE: Inbound Logistics 2010 3PL Perspectives

FIGURE 8 Logistics Services 3PLs Offer



SOURCE: Inbound Logistics 2010 3PL Perspectives

companies were able to negotiate more competitive pricing from their carriers and reduce costs accordingly. Inside distribution facilities, however, shippers faced challenges managing less inventory as efficiently and economically as possible.

Unpredictable demand had many in the wholesale and retail sectors holding off on replenishment, sending inventory-to-sales ratios through the warehouse roof. Some relied on carrying overstock to meet possible demand. Others, at the risk of out-of-stocks, kept inventories lean. Many concentrated their SKU profiles to better manage inventory costs and consumption shifts.

Matching lean freight volumes to an abundance of capacity became a competitive differentiator for shippers. Many looked to pool and consolidate shipments as much

as possible to rationalize transportation equipment utilization and costs. The number of 3PLs providing crossdocking services jumped to 83 percent in 2010, versus 77 percent the year before (SEE FIGURE 7).

Moreover, 72 percent of responding 3PLs offer inventory management services, up seven percent from 2009. (SEE FIGURE 8).

From sophisticated crossdock set-ups to dedicated corner-to-corner warehouse space, 3PLs are increasingly creative helping shippers pull inbound product at volume, break down shipments, and build fuller loads for last-mile delivery—thereby maximizing truckload and intermodal moves and minimizing LTL shipments.

DC management is another area where 3PLs have enabled companies to divest or eliminate costly overhead. Reducing labor costs, assets and infrastructure is top of mind for shippers, with 42 percent and 40 percent of 3PLs citing these areas as customer priorities, according to *IL's 3PL Perspectives* outreach. For smaller companies without sufficient volumes moving through the system, outsourcing facility management can plug hemorrhaging operational costs.

Couple DC management with pick/pack and subassembly services—74 percent of 3PL respondents offer these capabilities, up seven percent from 2009—and service providers become the de facto distribution cog within an enterprise. Shippers can rely on their warehouse partners to rework DC systems infrastructure, handle technology implementation, and manage seasonal labor needs, all the while uncovering inefficiencies and improving processes.

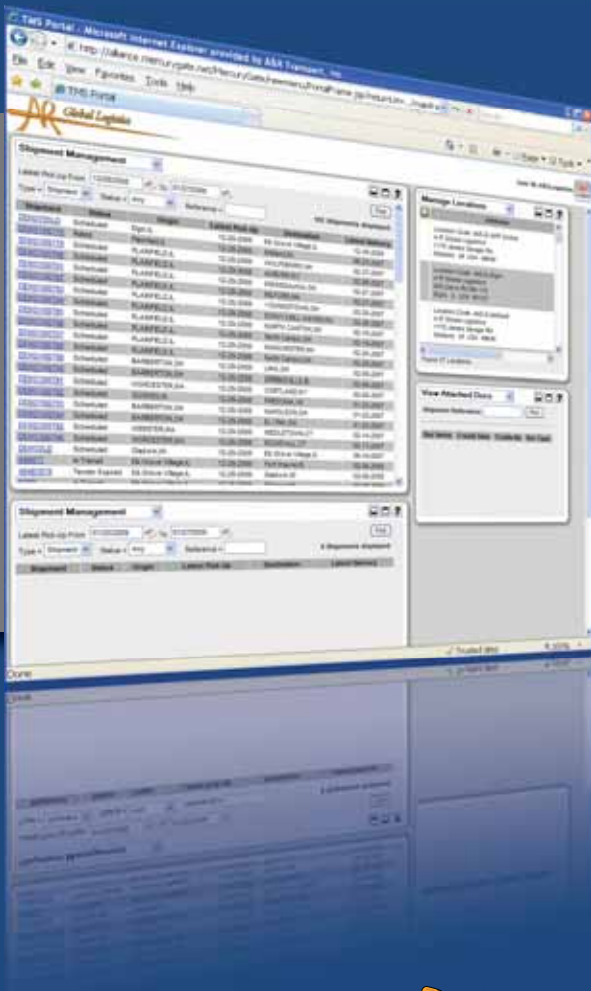
For many retail businesses, plummeting demand had a draconian impact on in-store sales—it pushed inventory back to the wholesale level. This created incentive for businesses to capitalize on e-fulfillment opportunities where they could liquidate stock farther back in the pipeline and eliminate the cost and time of delivering to retail outlets.

Not surprisingly, 3PLs offering fulfillment services spiked considerably this past year, with 74 percent providing such capabilities, compared to 60 percent in 2009. Also worth noting, direct-to-home fulfillment services among responding 3PLs saw an uptick of five percent versus last year, while intermediaries offering direct-to-store services remained static at 79 percent.

One interesting anomaly this year: the percentage of 3PLs offering vendor-managed inventory services dropped

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- c. Proactive Problem Solving
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- e. Proven Cost Reduction Strategies
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five percent from 2009. This might suggest that volume contraction and SKU shrinkage encouraged companies to bring more inventory back into their facilities to better utilize fixed assets rather than depend on 3PLs and vendors to own and replenish stock, as one 3PL posits. On the other hand, with sales down, companies didn't need stock on hand. Many didn't have cash to invest in inventory for uncertain demand.

MOVING THE NEEDLE WITH THE FREIGHT

Soft capacity during the past two years afforded shippers greater pricing leverage with carriers and 3PLs. And while volumes remained low, companies found incentive to optimize transportation processes and drive greater efficiency upstream and downstream in the supply chain. Simply, as inventory levels dipped, impediments surfaced.

Seventy-three percent of shippers responding to this year's study identify "reducing transport costs" as their

top challenge, mirroring last year's figures. 3PLs share that view, with nearly 80 percent citing it as their customers' greatest priority. Apart from technology, intermediaries are expanding their transportation services to help shippers streamline supply chains from source to shelf.

Pressures to improve transport efficiency materialize in any number of

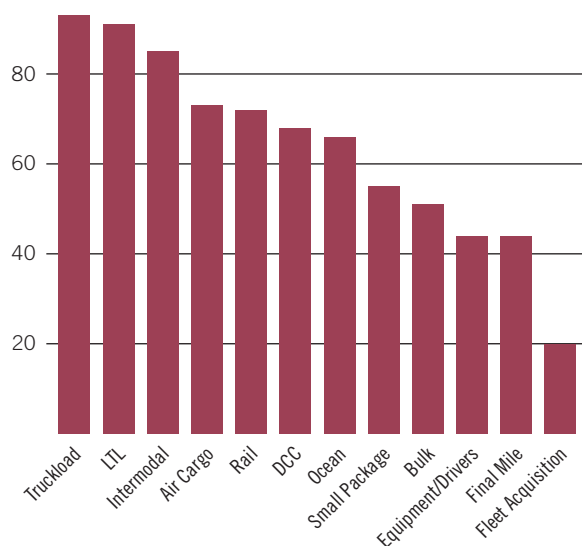
ways as shippers tackle fuel economy, sustainability mandates, time-to-market constraints, total landed costs, and fears of a capacity shortage.

Truckload and less-than-truckload services command the greatest investment in resources from 3PLs, with 93 percent and 91 percent offering these respective capabilities (SEE FIGURE 9). With memories of soaring diesel costs still fresh from two summers ago, and shipment volumes largely desiccated by the recession, shippers found themselves diverting loads to TL as much as possible, using more costly LTL options for shorter hauls.

Shippers are growing increasingly concerned about equipment capacity and driver availability if and when the economy strengthens. While this has yet to materialize, transportation companies have been quick to embrace the certainty of this reality as they look to raise rates. Many shippers are specifically sizing up third-party partnerships with carriers and logistics intermediaries/brokers to help access space if the market tightens. Where freight volumes warrant, some businesses are proactively committing to equipment. This year, 68 percent of 3PLs report that they offer dedicated contract carriage services, comparable to 2009. This number will likely grow into 2011.

Elsewhere, the trend toward distribution network decentralization has helped shorten last-mile transportation legs and given companies the flexibility to utilize other modes for long-distance moves where time and product sensitivity allows. The number of 3PLs offering intermodal capabilities (85 percent) and rail services (72 percent) remains high. As capacity and cost remain latent concerns, and as the railroads reach out to captive shippers and new prospects alike, service

FIGURE 9 Transportation Services 3PLs Offer



SOURCE: Inbound Logistics 2010 3PL Perspectives



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FIGURE 10 What is the number one reason 3PL partnerships fail?



SOURCE: Inbound Logistics 2010 3PL Perspectives

providers that can link rail, ocean, barge, and truck modes will grow in importance.

The number of 3PLs offering air cargo services saw a noticeable increase this year, jumping from 66 percent in 2009 to 73 percent, while those offering ocean capabilities remain steady at 66 percent. Freight forwarders are increasingly positioning themselves squarely in the third-party logistics space (some might argue they are non-asset-based 3PLs) to differentiate from the market and because it's a relatively easy progression from operating as a freight agent.

Regulatory pressure is also pushing shippers to outsource supply chain functions that overlap with ocean and airfreight carriage. U.S. Customs and Border Protection's Importer Security Filing went live at the beginning of 2010 after protracted discussions between the private sector and authorities as to how enforcement would unfold. While some consignees have acquired technology applications to aggregate and communicate new data inputs to Customs, others have outsourced the responsibility altogether.

There is value in using "10+2" compliance as incentive to better manage vendors, especially as offshore manufacturing and supplier networks link deeper and grow more convoluted. Apart from meeting regulatory requirements, shippers are leveraging 3PL partnerships to improve quality control and drive supply chain visibility to myriad source points.

From booking ocean and air freight to tracking shipments to aggregating data from vendors and preparing necessary paperwork for regulatory agencies, 3PLs offer shippers and consignees the bandwidth to do it all offshore. Accordingly, 72 percent of respondents offer import/export/

customs capabilities, with 68 percent and 38 percent providing vendor management and global trade services, respectively.

LEADING DEMAND

These types of supply chain management progressions are typical of how 3PLs help customers embrace strategic initiatives that solve functional logistics problems rather than crafting band-aid solutions. That said, only 25 percent of surveyed outsourcers, and 3PLs, view business process improvement as a priority for the shipper community.

Last year, companies were tasked with reducing logistics costs and overhead, which, given budget constraints, naturally pointed to tactical optimization rather than sweeping supply chain change. For example, one area that has received widespread attention from shippers and service providers alike is supply chain sustainability. In 2009, nearly 40 percent of 3PLs cited this as a challenge for customers. This year, only 21 percent responded in kind—and shippers shared that opinion.

Such a precipitous dip in sustainability focus is not surprising, given all the challenges shippers encountered. In small ways, though, optimizing transportation and logistics processes manifested a measure of greenness that may not have been visibly explicit. The business case for sustainability is at the core of supply chain management. Many companies managed products more closely through their entire lifecycle—from raw material sourcing to asset recovery and aftermarket support—to reduce cost and even create new revenue streams. 3PLs remain committed to these green leanings with 81 percent offering reverse logistics solutions and 40 percent providing product lifecycle management services.

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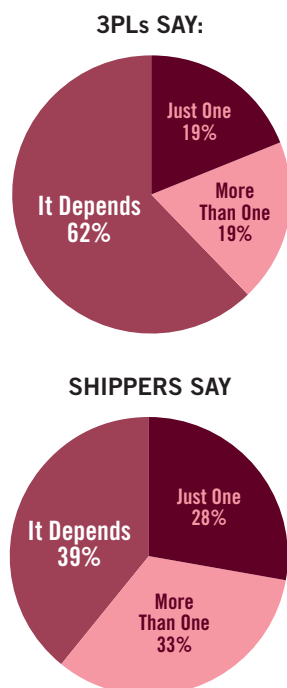
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FIGURE 11 Should Customers Generally Partner With One 3PL or More Than One?



SOURCE: Inbound Logistics 2010 3PL Perspectives

While business process improvements the likes of sustainability initiatives may be of less concern for shippers struggling to stay in the black, many 3PLs seize these types of opportunities to help drive strategic change beyond simply transportation or inventory management. Service providers may be coy tipping their hat, but business process improvement is the dangling carrot that builds long-term outsourcing partnerships. To point, 65 percent of surveyed 3PLs offer logistics process re-engineering capabilities, allowing them to assess existing systems and processes to reduce costs and improve business responsiveness and customer service.

Corresponding with last year's data, 94 percent of 3PL respondents offer inbound logistics services and 78 percent integrated logistics services. Helping shippers take control of transportation and distribution processes deeper in the supply chain triggers a cascade of efficiencies downstream. Integrating functional parts, from procurement to inbound transportation to inventory management to outbound delivery, enables companies to more efficiently and economically respond to demand.

This type of visibility to, and control over, inventory and data empowers sophisticated demand-driven logistics processes such as just-in-time fulfillment. Seventy-five percent of 3PLs offer JIT services, which will likely regain favor if consumerism picks up and businesses begin fulfilling inventory to demand in lieu of reactively holding buffer stock.

FOLLOWING DEMAND

As much as 3PLs take shippers in new directions, both tactically and strategically, customers are equally complicit testing the bounds of

outsourcing. For example, the role of fourth-party logistics service providers is gaining broader traction after years of tentative movement in complex sourcing industries such as automotive—72 percent of reporting 3PLs offer this service.

More importantly, when asked what is the one hot button outsourcing trend moving forward, 3PLs overwhelmingly cite 4PL partnerships and supply chain decentralization.

The challenge of centrally managing global supply chains, shortening supply lines, and reducing total logistics costs has pressed some industries to regionalize production and distribution. Best-of-breed intermediaries with specific geographic, functional, and vertical expertise offer manufacturers and retailers incentive to work with multiple supply chain partners. In turn, this diversification has created a niche for 3PL providers that can manage multi-tiered networks as lead logistics providers.

Another way 3PLs are carving a path for 4PL partnerships is through technology development. Smaller 3PLs are partnering with tech-savvy counterparts to make their solutions available to customers. So a logistics service provider with a homegrown TMS can provide functionality to other 3PLs as well as to their end users – often at a fraction of the spot market cost.

While competitive hubris has always been an obstacle to such arrangements—especially with the threat of 4PLs bypassing 3PLs and working directly with end users—collaboration among service providers, on behalf of customers, is becoming much more prevalent. This year, 81 percent of 3PLs think customers should consider more than one service provider, while only 19 percent feel customers should work with one partner (SEE FIGURE 11).

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By contrast, in 2009, 63 percent leaned toward multiple partners, suggesting self-interest among 3PLs in a rebounding economy continues to soften. Shippers responding to the same question reveal more conflicted

opinions, with 28 percent favoring only one 3PL partner and 72 percent willing to consider multiple 3PLs.

The concern for shippers is having one point of control over outsourcing arrangements rather than a

fragmented network of disparate transportation and logistics partners. That said, the business case for working with multiple best-of-breed service providers suggests even further potential growth in the 4PL space.

Introducing the 2010 Top 100 3PL Providers

Inbound Logistics' Top 100 3PL Providers list (pg. 102) anchors this otherwise fleeting assessment of the outsourced logistics industry. Our directory of leading logistics service providers offers a detailed snapshot of companies *IL* editors deem best suited to meet your transportation and logistics needs.

Culling this roster of Top 100 3PLs from nearly 300 candidates requires a great deal of due diligence and attention to

detail. *IL* editors carefully evaluated questionnaires from third-party logistics providers, in addition to communicating with their customers. The 3PLs we selected are capable of meeting the diverse outsourcing demands of the shipper community.

After you process *3PL Perspectives* and pick apart the Top 100 list, we would like to know what you think. Email us: editor@inboundlogistics.com

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THE TOP 100 3PL PROVIDERS

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BNSF Logistics bnsflogistics.com	888-285-4514	N	●	●	●	●	●	●		●		●	●	●	●	CHEM, CONST, CPG, ELEC, F&B, APP, FURN, GROC, PHARMA	●			●	●	●
Bradford Global Logistics bradford-corp.com	281-220-8712	B						●		●	●	●	●	●	●	AUTO, CHEM, CPG, F&B, APP, GROC	●	●	●			
Brightpoint brightpoint.com	800-952-2355	B	●	●	●	●	●		●			●	●	●	●	WIRELESS	●	●	●	●	●	●
C.H. Robinson Worldwide chrobinson.com	800-323-7587	N	●	●	●	●	●	●	●	●		●	●	●	●	AGRI, AUTO, CHEM, CONST, CPG, ELEC, F&B, APP, FURN, GROC, HEALTH, PHARMA	●	●	●	●	●	●

Vertical Specialization Key

AGRI	Agriculture	CPG	Consumer Packaged Goods	FURN	Furniture
AUTO	Automotive	ELEC	Electronics	GROC	Grocery
CHEM	Chemicals	F&B	Food & Beverage	HEALTH	Healthcare
CONST	Construction & Building Materials	APP	Apparel	PHARMA	Pharmaceuticals

TRANSPORTATION SERVICES														WAREHOUSING SERVICES							SPECIAL SERVICES							TECHNOLOGY/WEB SERVICES																	
	PAYMENT AUDITING/PROCESSING	INVENTORY MANAGEMENT	VENDOR MANAGEMENT	PRODUCT LIFE CYCLE MANAGEMENT	SMALL PACKAGE	AIR CARGO	LTL	TRUCKLOAD	INTERMODAL	OCEAN	RAIL	BULK	DEDICATED CONTRACT CARRIAGE	FLEET ACQUISITION	EQUIPMENT/DRIVERS	FINAL MILE	PICK/PAK, SUBASSEMBLY	CROSSDOCKING	DC MANAGEMENT	LOCATION SERVICES	VENDOR MANAGED INVENTORY	FULFILLMENT	DIRECT TO STORE	DIRECT TO HOME	IMPORT/EXPORT/CUSTOMS	REVERSE LOGISTICS	MARKETING/CUSTOMER SERVICE	GLOBAL EXPANSION (SOURCING/SELLING)	SECURITY ANALYSIS	CONTINGENCY/CRISIS PLANNING	LOGISTICS/TRANSPORTATION CONSULTING	LABOR MANAGEMENT	EDI	WIRELESS/Rfid	WEB ENABLEMENT	VISIBILITY	CRM/SRM								
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THE TOP 100 3PL PROVIDERS

2010

CONTACT INFO			ASSET- OR NON-ASSET-BASED	AREAS SERVED					CERTIFICATIONS			MARKETS SERVED			VERTICAL SPECIALIZATION(S)		LOGISTICS SERVICES						
				ASIA/SOUTHEAST ASIA/INDIA	MIDDLE EAST/NORTH AFRICA	EUROPE/EASTERN EUROPE/RUSSIA	SOUTH AMERICA	US/CANADA/MEXICO	SMARTWAY TRANSPORT PARTNER	ISO	C-TPAT	MANUFACTURING	RETAIL/E-BUSINESS	DISTRIBUTORS/WHOLESALE			SERVICE INDUSTRIES/GOVERNMENT	LLP/4PL	INTEGRATED LOGISTICS	JIT	GLOBAL TRADE SERVICES	INBOUND LOGISTICS	LOGISTICS PROCESS REENGINEERING
Cardinal Logistics Management cardlog.com 800-800-8293			B					◆	●			●	●	●	AGRI, AUTO, CHEM, CONST, CPG, ELEC, F&B, APP, FURN, GROC		●	●		●	●		
Caterpillar Logistics Services logistics.cat.com 309-266-3591			N	●	●	●	●	●	●	●	●	●	●	●	AGRI, AUTO, CHEM, CPG, APP		●	●	●	●	●		
CEVA Logistics cevalogistics.com 800-355-0350			N	●	●	●	●	●	●	●	●	●	●	●	AUTO, CPG, ELEC, APP, HEALTH, PHARMA		●	●	●	●	●		
ChemLogix chemlogix.com 630-579-8200			N	●	●	●	●	●				●			CHEM		●		●	●	●		
Comprehensive Logistics complog.com 630-835-9272			B					●	●	●	●			●	●	AUTO, CHEM, CONST, CPG, ELEC		●	●	●	●	●	
Corporate Traffic corporate-traffic.com 800-787-2334			B	●	●	●	●	●				●	●	●	●	AGRI, AUTO, CONST, CPG, ELEC, F&B, APP, FURN, GROC, HEALTH, PHARMA			●	●	●	●	
Crowley Logistics crowley.com 904-727-2438			B	▶			●	●	●	●	●	●	●	●	AGRI, AUTO, CHEM, CONST, CPG, ELEC, F&B, APP, FURN, GROC, PHARMA		●	●	●	●	●	●	
CRST Logistics crstlogistics.com 319-390-6213			N					●	●			●	●	●	●	AUTO, CONST, CPG, F&B, GROC		●	●		●		
CT Logistics ctllogistics.com 216-267-2000			B			■	●	●	●	●		●	●	●	AUTO, CHEM, CONST, CPG, APP, FURN, GROC, HEALTH, PHARMA		●	●	●		●	●	
CTSI ctsi-global.com 901-766-1500			N	●	●	●	●	●				●	●	●	AGRI, AUTO, CHEM, CONST, CPG, ELEC, F&B, APP, FURN, GROC, HEALTH, PHARMA		●	●		●	●		
D.W. Morgan Company dwmorgan.com 925-460-2700			N	●	●	●	●	●	●	●				●	AUTO, PHARMA		●	●		●	●	●	
Damco damco.com 973-514-5126			B	●	●	●	●	●	●	●	●	●	●	●	AGRI, AUTO, CHEM, CONST, CPG, ELEC, F&B, APP, FURN, GROC, HEALTH, PHARMA		●	●		●	●		
Distribution Technology distributiontechnology.com 704-587-5587			A					●		●	●	●	●		CHEM, CONST, CPG, F&B, FURN, GROC, HEALTH		●	●	●		●	●	
DSC Logistics dsclogistics.com 800-372-1960			B					●	●	●		●	●	●	●	CPG, ELEC, F&B, APP, GROC, HEALTH		●	●	●	●	●	●
Dupré Logistics duprelogistics.com 800-356-3659			B					◆	●		●	●	●	●	AGRI, AUTO, CHEM, CONST, CPG, ELEC, F&B, APP, FURN, GROC, HEALTH		●	●	●		●	●	
Echo Global Logistics echo.com 312-276-3222			N	●	●	●	●	●	●			●	●	●	NONE		●	●	●	●	●	●	
England Logistics englandlogistics.com 801-656-4718			B	●		●	●	●	●		●	●	●	●	AGRI, AUTO, CONST, CPG, F&B, APP, FURN, GROC, HEALTH			●	●	●	●	●	
Evans Distribution Systems evansdist.com 313-388-3200			B					●	●			●	●	●	AUTO, CHEM, CONST, CPG, ELEC, F&B, APP, GROC, HEALTH		●	●	●		●	●	
Exel/DHL Supply Chain exel.com 800-272-1052			B	●	●	●	●	●	●	●	●	●	●	●	AGRI, AUTO, CHEM, CONST, CPG, ELEC, F&B, APP, FURN, GROC, HEALTH, PHARMA		●	●	●	●	●	●	
Expeditors expeditors.com 206-674-3400			N	●	●	●	●	●	●	●	●	●	●	●	AUTO, CPG, ELEC, APP, HEALTH, PHARMA		●	●	●	●	●		
FAC Logistics faclogistics.com 252-407-2091			B	●			●	●		●	●	●	●	●	F&B		●	●	●		●		

AGRI	Agriculture	CPG	Consumer Packaged Goods	FURN	Furniture
AUTO	Automotive	ELEC	Electronics	GROC	Grocery
CHEM	Chemicals	F&B	Food & Beverage	HEALTH	Healthcare
CONST	Construction & Building Materials	APP	Apparel	PHARMA	Pharmaceuticals

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THE TOP 100 3PL PROVIDERS

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CONTACT INFO			ASSET- OR NON-ASSET-BASED	AREAS SERVED					CERTIFICATIONS		MARKETS SERVED				VERTICAL SPECIALIZATION(S)		LOGISTICS SERVICES						
				ASIA/SOUTHEAST ASIA/INDIA	MIDDLE EAST/NORTH AFRICA	EUROPE/EASTERN EUROPE/RUSSIA	SOUTH AMERICA	US/CANADA/MEXICO	SMARTWAY TRANSPORT PARTNER	ISO	C-TPAT	MANUFACTURING	RETAIL/E-BUSINESS	DISTRIBUTORS/WHOLESALE			SERVICE INDUSTRIES/GOVERNMENT	LLP/4PL	INTEGRATED LOGISTICS	JIT	GLOBAL TRADE SERVICES	INBOUND LOGISTICS	LOGISTICS PROCESS REENGINEERING
FedEx SupplyChain fedex.com			469-524-6938	B	●	●	■	●	●	●	●	●	●	●	AUTO, ELEC, HEALTH		●	●	●	●	●	●	
Flash Global Logistics flashlogistics.com			866-611-7874	N	●	●	●	●	●		●	●	●	●	ELEC, HEALTH		●	●		●	●	●	
GENCO Supply Chain Solutions genco.com			800-378-9671	N					●	●	●	●	●	●	CHEM, CONST, CPG, ELEC, F&B, APP, FURN, HEALTH, PHARMA		●			●	●		
Geodis Wilson geodiswilson.com			732-362-0647	N	●	●	■	●	●	●	●	●	●	●	AUTO, CHEM, CONST, CPG, ELEC, APP, HEALTH, PHARMA			●		●			
The Gilbert Company gilbertusa.com			800-406-5507	B				●	●		●	●	●	●	CPG, ELEC, APP		●	●		●			
Greatwide Logistics Services greatwide.com			972-228-7389	N				●	●		●	●	●	●	AUTO, CPG, F&B, APP, GROC		●			●	●		
Hellmann Worldwide Logistics hellmann.net			305-406-4500	N	●	●	●	●	●	●	●	●	●	●	AGRI, AUTO, CHEM, CONST, CPG, ELEC, F&B, APP, FURN, GROC, HEALTH, PHARMA		●	●	●	●	●		
J.B. Hunt Transport Services jbhunt.com			800-452-4868	B				●	●		●	●	●	●	AGRI, AUTO, CHEM, CONST, CPG, ELEC, F&B, APP, FURN, GROC, HEALTH, PHARMA		●	●	●	●	●		
Jacobson Companies jacobsonco.com			800-636-6171	N	●	●	■	●	●	●	●	●	●	●	AGRI, AUTO, CHEM, CPG, ELEC, F&B, APP, GROC, HEALTH, PHARMA		●	●	●		●		
Johanson Transportation Service johansontrans.com			559-458-2200	N	●	●	■	●	●		●	●	●	●	AGRI, AUTO, CHEM, CONST, CPG, ELEC, F&B, APP, FURN, GROC, HEALTH, PHARMA					●			
Kane Is Able kaneisable.com			888-356-KANE	B				●	●	●	●	●	●	●	CPG, F&B, GROC, HEALTH, PHARMA		●	●		●	●		
Katt Worldwide Logistics kattworld.com			901-322-2900	B	●	●	●	●	●		●	●	●	●	AGRI, AUTO, CHEM, CONST, CPG, ELEC, F&B, FURN, HEALTH, PHARMA		●	●	●	●	●		
Kelron Logistics kelron.com			800-668-3785 ext. 2224	N				●	●		●	●	●	●	AGRI, AUTO, CHEM, CPG, ELEC, F&B, GROC		●	●	●	●	●		
Kenco Logistic Services kencogroup.com			800-758-3289	B				●	●	●	●	●	●	●	AGRI, AUTO, CONST, CPG, ELEC, F&B, APP, FURN, GROC, HEALTH, PHARMA		●	●	●		●		
Kuehne + Nagel kuehne-nagel.com			888-246-8726	N	●	●	●	●	●	●	●	●	●	●	AGRI, AUTO, CHEM, CONST, CPG, ELEC, F&B, APP, FURN, GROC, HEALTH, PHARMA		●	●	●	●	●		
Landstar System landstar.com			800-872-9169	N	●	●	●	●	●	●	●	●	●	●	AGRI, AUTO, CHEM, CONST, CPG, ELEC, F&B, APP, FURN, HEALTH, PHARMA		●	●	●	●	●		
LeSaint Logistics lesaint.com			630-243-5915	B					●	●	●	●	●	●	CHEM, CPG, ELEC, F&B, APP, FURN, HEALTH		●	●	●	●	●		
Logistics Management Solutions (LMS) lmslogistics.com			800-355-2153	N				●	●	●	●	●	●	●	AGRI, CHEM		●	●		●	●		
LynnCo Supply Chain Solutions lynnco-scs.com			866-872-3264	N				●			●		●		AGRI, AUTO, CONST, ELEC, HEALTH		●	●		●	●		
Mallory Alexander mallorygroup.com			800-257-8464	N	●	●	●	●	●	●	●	●	●	●	AGRI, AUTO, CHEM, CONST, CPG, ELEC, F&B, APP, FURN, GROC, HEALTH, PHARMA		●	●	●	●	●		
Matson Integrated Logistics matson.com			904-220-3660	B	●			●	●	●	●	●	●	●	CHEM, CONST, CPG, ELEC, F&B, APP, FURN, GROC			●		●	●		

Vertical Specialization Key

AGRI	Agriculture	CPG	Consumer Packaged Goods	FURN	Furniture
AUTO	Automotive	ELEC	Electronics	GROC	Grocery
CHEM	Chemicals	F&B	Food & Beverage	HEALTH	Healthcare
CONST	Construction & Building Materials	APP	Apparel	PHARMA	Pharmaceuticals

TRANSPORTATION SERVICES													WAREHOUSING SERVICES						SPECIAL SERVICES						TECHNOLOGY/WEB SERVICES														
	PAYMENT AUDITING/PROCESSING	INVENTORY MANAGEMENT	VENDOR MANAGEMENT	PRODUCT LIFE CYCLE MANAGEMENT	SMALL PACKAGE	AIR CARGO	LTL	TRUCKLOAD	INTERMODAL	OCEAN	RAIL	BULK	DEDICATED CONTRACT CARRIAGE	FLEET ACQUISITION	EQUIPMENT/DRIVERS	FINAL MILE	PICK/PAK, SUBASSEMBLY	CROSSDOCKING	DC MANAGEMENT	LOCATION SERVICES	VENDOR MANAGED INVENTORY	FULFILLMENT	DIRECT TO STORE	DIRECT TO HOME	IMPORT/EXPORT/CUSTOMS	REVERSE LOGISTICS	MARKETING/CUSTOMER SERVICE	GLOBAL EXPANSION (SOURCING/SELLING)	SECURITY ANALYSIS	CONTINGENCY/CRISIS PLANNING	LOGISTICS/TRANSPORTATION CONSULTING	LABOR MANAGEMENT	EDI	WIRELESS/Rfid	WEB ENABLEMENT	VISIBILITY	CRM/SRM		
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THE TOP 100 3PL PROVIDERS

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CONTACT INFO			ASSET- OR NON-ASSET-BASED	AREAS SERVED					CERTIFICATIONS			MARKETS SERVED			VERTICAL SPECIALIZATION(S)		LOGISTICS SERVICES					
				ASIA/SOUTHEAST ASIA/INDIA	MIDDLE EAST/NORTH AFRICA	EUROPE/EASTERN EUROPE/RUSSIA	SOUTH AMERICA	US/CANADA/MEXICO	SMARTWAY TRANSPORT PARTNER	ISO	C-TPAT	MANUFACTURING	RETAIL/E-BUSINESS	DISTRIBUTORS/WHOLESALE			SERVICE INDUSTRIES/GOVERNMENT	LLP/4PL	INTEGRATED LOGISTICS	JIT	GLOBAL TRADE SERVICES	INBOUND LOGISTICS
Menlo Worldwide Logistics menloworldwide.com 866-466-3656			N	●		■	●	●	●	●		●	●	●	●	AUTO, CHEM, CPG, ELEC, F&B, APP, GROC, HEALTH	●	●	●		●	●
Network Global Logistics nglog.com 888-285-7447			B	●	●	●	●	●				●	●	●	●	AUTO, CPG, ELEC, F&B, APP, FURN, GROC, HEALTH, PHARMA	●	●	●		●	●
New Breed Logistics newbreed.com 336-232-4117			N			■		●	●	●	●	●	●	●	●	CPG, ELEC, APP, HEALTH	●	●	●	●	●	●
Nexus Distribution nexusdistribution.com 800-536-5220			B					●	●			●	●	●	●	AGRI, AUTO, CONST, CPG, ELEC, F&B	●	●	●		●	●
NFI nfiindustries.com 866-219-7450			A	●	●	●	●	●	●			●	●	●	●	CONST, CPG, ELEC, F&B, APP, GROC	●	●	●	●	●	●
NYK Logistics na.nyklogistics.com 800-414-3895			B	●	●	●	●	●	●	●		●	●	●	●	AGRI, AUTO, CHEM, CONST, CPG, ELEC, F&B, APP, FURN, GROC, HEALTH, PHARMA	●	●	●	●	●	●
Odyssey Logistics & Technology odysseylogistics.com 203-448-3900			N	●	●	●	●	●		●	●					CHEM	●	●	●	●	●	●
OHL ohl.com 800-401-6400			N	●	●	●	●	●		●	●	●	●	●	●	CPG, ELEC, F&B, APP, GROC, HEALTH	●	●	●	●	●	●
OOCL Logistics (USA) oocllogistics.com 212-269-9010			B	●	●	■		●		●	●	●	●			CPG, ELEC, APP	●	●	●		●	●
Panalpina panalpina.com 973-727-6174			N	●	●	●	●	●		●	●	●	●	●	●	AUTO, CHEM, CPG, ELEC, APP, HEALTH, PHARMA	●	●	●	●	●	●
Penske Logistics penskelogistics.com 800-529-6531			N	●		●	●	●	●	●	●	●	●	●	●	AGRI, AUTO, CHEM, CONST, CPG, ELEC, F&B, FURN, GROC, HEALTH, PHARMA	●	●	●	●	●	●
Performance Team ptgt.net 562-345-2271			B	●	●	■	●	●	●			●	●	●	●	AUTO, CPG, ELEC, F&B, APP, FURN, GROC, HEALTH, PHARMA	●	●	●	●	●	●
Pilot Freight Services pilotdelivers.com 610-891-8100			N	●	●	●	●	●	●	●	●	●	●	●	●	AUTO, CONST, CPG, ELEC, F&B, APP, FURN, GROC, HEALTH, PHARMA, HEALTH	●	●	●	●	●	●
Port Jersey Logistics portjersey.com 609-860-1010			B					●		●	●	●	●	●	●	CPG, ELEC, F&B, APP, FURN, GROC, HEALTH, PHARMA	●	●			●	●
Regal Logistics regallogistics.com 253-719-3025			B					●	●		●	●	●	●		CPG, ELEC, F&B, APP	●	●			●	
RMX Global Logistics rmxglobal.com 888-824-7365			B					●	●			●		●	●	AGRI, AUTO, CONST, CPG, F&B, GROC	●	●	●		●	●
RR Donnelley rrd.com 888-SHIP-RRD			N	●	●	●	●	●	●			●	●	●	●	AUTO, CONST, CPG, ELEC, F&B, APP, FURN, GROC, HEALTH, PHARMA	●	●	●	●	●	●
Ruan ruan.com 866-782-6669			B					●	●	●		●	●	●		AGRI, AUTO, CHEM, CONST, CPG, F&B, FURN, GROC, HEALTH	●	●	●		●	●
Ryder Supply Chain Solutions ryderscs.com 888-887-9337			N	▶		■		●	●	●	●	●	●	●	●	AGRI, AUTO, CHEM, CONST, CPG, ELEC, F&B, APP, FURN, GROC, HEALTH	●	●	●	●	●	●
Saddle Creek Corporation saddlecrk.com 888-878-1177			B					●	●	●	●	●	●	●	●	CPG, ELEC, F&B, GROC, HEALTH	●	●	●		●	●
Schenker AG dbschenker.com 800-225-5229			N	●	●	●	●	●		●	●	●	●	●		AGRI, AUTO, CHEM, CONST, CPG, ELEC, F&B, APP, FURN, HEALTH	●	●	●		●	●

AGRI	Agriculture	CPG	Consumer Packaged Goods	FURN	Furniture
AUTO	Automotive	ELEC	Electronics	GROC	Grocery
CHEM	Chemicals	FB&B	Food & Beverage	HEALTH	Healthcare
CONST	Construction & Building Materials	APP	Apparel	PHARMA	Pharmaceuticals

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THE TOP 100 3PL PROVIDERS

2010

CONTACT INFO		ASSET- OR NON-ASSET-BASED	AREAS SERVED					CERTIFICATIONS			MARKETS SERVED			VERTICAL SPECIALIZATION(S)	LOGISTICS SERVICES						
			ASIA/SOUTHEAST ASIA/INDIA	MIDDLE EAST/NORTH AFRICA	EUROPE/EASTERN EUROPE/RUSSIA	SOUTH AMERICA	US/CANADA/MEXICO	SMARTWAY TRANSPORT PARTNER	ISO	C-TPAT	MANUFACTURING	RETAIL/E-BUSINESS	DISTRIBUTORS/WHOLESALE		SERVICE INDUSTRIES/GOVERNMENT	LLP/4PL	INTEGRATED LOGISTICS	JIT	GLOBAL TRADE SERVICES	INBOUND LOGISTICS	LOGISTICS PROCESS REENGINEERING
Schneider Logistics schneider.com	866-875-9046	N	●	●	●	●	●	●	●	●	●	●	●	AGRI, AUTO, CHEM, CONST, CPG, ELEC, F&B, APP, FURN, GROC, HEALTH, PHARMA	●	●	●	●	●	●	
SEKO Worldwide sekoworldwide.com	800-228-2711	N	●	●	●	●	●	●	●	●	●	●	●	AGRI, AUTO, CHEM, CONST, CPG, ELEC, F&B, APP, FURN, GROC, HEALTH, PHARMA	●	●	●	●	●	●	
Serec of California serec.com	312-659-6818	A					●				●	●	●	CPG, APP, HEALTH	●				●	●	
Shippers Warehouse shipperswarehouse.com	214-275-1060	B					●	●	●		●	●	●	AGRI, AUTO, CHEM, CONST, CPG, ELEC, F&B, FURN, GROC, HEALTH, PHARMA	●	●			●	●	
Strive Logistics strivelogistics.com	773-342-5780	B	●	●	●	●	●				●	●	●	AGRI, AUTO, CHEM, CONST, CPG, ELEC, F&B, APP, FURN, GROC, HEALTH, PHARMA	●	●	●	●	●	●	
Syncreon syncreon.com	248-377-4700	B	●	●	●	●	●	●	●		●	●	●	AUTO, CHEM, CONST, CPG, ELEC, APP, HEALTH, PHARMA	●	●	●		●	●	
TMSi Logistics tmsilog.com	603-792-2205	B					◆		●	●	●	●	●	CONST, CPG, ELEC, PHARMA	●	●	●		●	●	
Total Logistic Control totallogistic.com	800-333-5599	B					●	●		●	●	●	●	CPG, F&B, GROC, HEALTH, PHARMA	●	●	●		●	●	
Transfreight transfreight.com	859-372-5981	B					●			●	●			AUTO, CONST, ELEC	●	●	●	●	●	●	
TransGroup Worldwide Logistics transgroup.com	206-244-0330	N	●	●	●	●	●	●	●	●	●	●	●	AGRI, AUTO, CHEM, CONST, CPG, ELEC, F&B, APP, FURN, HEALTH, PHARMA	●	●	●	●	●	●	
Transplace transplace.com	888-445-9425	N	●		■		●	●		●	●	●	●	AUTO, CONST, CPG, F&B, APP, FURN, GROC, HEALTH	●	●	●	●	●	●	
Tucker Company Worldwide tuckerco.com	800-229-7780	N	●	●	●	●	●	●		●		●	●	AGRI, CHEM, CPG, HEALTH, PHARMA	●	●	●		●	●	
Unyson Logistics unysonlogistics.com	866-409-9759	N	●		●	●	●	●		●	●	●	●	AUTO, CONST, CPG, F&B, APP, FURN, HEALTH, PHARMA	●	●	●	●	●	●	
UPS SCS ups-scs.com	800-742-5727	B	●	●	●	●	●		●	●	●	●	●	AUTO, ELEC, HEALTH	●	●	●	●	●	●	
UTi Worldwide go2uti.com	800-331-1226	N	●	●	●	●	●	●	●	●	●	●	●	AGRI, AUTO, CHEM, CONST, CPG, ELEC, F&B, APP, GROC, HEALTH, PHARMA	●	●	●		●	●	
VersaCold Logistics Services versacold.com	800-563-COLD	B					●		●		●	●	●	F&B	●	●			●	●	
Wagner Industries wagnerindustries.com	816-421-3520 ext. 303	B					●	●			●	●	●	CPG, F&B, APP	●	●	●		●	●	
Weber Distribution weberdistribution.com	877-624-2700	B					●	●		●	●	●	●	AGRI, AUTO, CHEM, CONST, CPG, ELEC, F&B, APP, FURN, GROC, HEALTH, PHARMA, Paper	●	●	●		●	●	
Werner werner.com	800-228-2240	A	●	●	●	●	●		●		●	●	●	AGRI, CONST, CPG, ELEC, F&B, APP, FURN, GROC	●	●	●	●	●	●	
Wheels Clipper wheelsgroup.com	905-602-2746	N	●		■	●	●	●	●		●	●	●	AGRI, AUTO, CHEM, CONST, CPG, ELEC, F&B, APP, FURN, GROC	●		●	●	●	●	
WSI (Warehouse Specialists Inc.) wsinc.com	800-999-2545	B					◆	●	●	●	●	●	●	AGRI, AUTO, CHEM, CONST, CPG, ELEC, F&B, APP, FURN, GROC, HEALTH	●	●	●		●	●	

AGRI	Agriculture	CPG	Consumer Packaged Goods	FURN	Furniture
AUTO	Automotive	ELEC	Electronics	GROC	Grocery
CHEM	Chemicals	F&B	Food & Beverage	HEALTH	Healthcare
CONST	Construction & Building Materials	APP	Apparel	PHARMA	Pharmaceuticals

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THE TOP 10 3PL EXCELLENCE

What's the worth of a true partner? Someone you know you can depend on when you're not sure which way to go. Someone you can count on to help you make things right after they've gone wrong. Someone you trust to look out for your best interests.

In business, as in life, such a partner is worth more than words can express. Nonetheless, our readers offered up effusive praise for their third-party logistics service providers.

"When my customers need an emergency order delivered the next day, I tell them, 'No problem,'" reports one shipper. "I can do that because I know all I have to do is call my 3PL, and they will get it done. They make my job a lot easier and keep my customers happy." Sounds like a match made in heaven.

"My company has used our 3PL for more than 10 years and never had a problem." That's an impressive run.

"My 3PL knows the industry inside out and helps position my business for exceptional performance." Who couldn't use a boost like that?

Our annual Readers' Choice Top 10 3PL Excellence Awards give readers a voice to celebrate their service providers, and they have plenty to say. This year, more than 9,500 respondents cast their votes, and 4,664 of them shared their accolades. We heard from the spectrum of supply chain professionals – from office managers to top executives, at mom-and-pop retailers to global corporations such as Hewlett-

Packard, ConAgra Foods, Frito-Lay, Pitney Bowes, Toys "R" Us, and Nissan.

Our readers' diverse logistics experience (see "*About the Survey Respondents*" chart, right) gives them varied and authoritative perspective on what matters most in a 3PL partnership. Year after year, spectacular service makes the biggest impression on shippers. Seventy-seven percent of this year's survey respondents rank service as more important than price, and 2,435 readers rate poor customer service as the primary reason 3PL relationships fail.

Prioritizing service doesn't mean that costs are inconsequential, however. Twenty-three percent of respondents report that cutting transport spend is their biggest challenge, followed by improving customer service (13 percent), expanding to new markets (10 percent), and reducing labor costs (nine percent).

Enlisting a partner to help face such challenges makes it easier to shoulder the burden, and our readers are abundantly grateful to the 3PLs that stand with them through thick and thin. Turn the page to find out what else they had to say, and help us salute this year's Top 10 3PLs, as chosen by *IL* readers.

And the Winners Are...

1. **Ryder**
2. **C.H. Robinson**
3. **Menlo Worldwide**
4. **Transplace**
5. **UPS SCS**
6. **Exel**
7. (tie) **BNSF Logistics**
7. (tie) **J.B. Hunt**
8. **Landstar**
9. **Penske Logistics**
10. (tie) **TLC**
10. (tie) **Unyson**

3PLs TO WATCH

The following 3PLs garnered a significant number of reader votes. They may not have made the Top 10 this year, but next year—who knows?

- Access America Transport
- Allen Logistics
- Alliance Shippers
- Echo Global Logistics
- England Logistics
- Expeditors International
- FedEx Supply Chain Services
- Kelron Logistics
- Schneider Logistics
- Sunset Transportation

READERS' CHOICE

AWARDS

About the Survey Respondents

FUNCTION		SERVICES READERS BUY	
Corporate Management	31%	Motor Freight	78%
Logistics	31%	Warehousing	63%
Transportation	23%	Small Package, Expedited	78%
Supply Chain	15%	3PL	61%
INDUSTRY		Air Freight	51%
Manufacturers	48%	Logistics Technology	66%
Retail and Wholesale	39%	Rail, Rail/Intermodal	42%
Services	9%	Ocean, Ocean/Intermodal	42%
Government	4%	Global Logistics	38%
TRANSPORT/LOGISTICS SPEND		Materials Handling Equipment	41%
\$50 million+	18%	Transportation Equipment	24%
\$10-\$49 million	42%		
\$1-\$9 million	25%		
Less than \$1 Million	15%		

Rave Reviews

A SAMPLING OF READER COMMENTS

- “BNSF Logistics provides excellent service and goes above the call of duty.”

– Peter Turner, logistics manager, Choice Foods
- “When Exel commits to a load, I know they will deliver the freight to our customers on time, every time.”

– Beth Slocumb, distribution coordinator, Southwest Canning and Packaging Inc.
- “Ryder provided great service to our organization and worked hand-in-hand in coming up with new opportunities to save money and increase efficiency with routings at our facilities.”

– Michael A. Monastero, logistics manager, Americas, Lubrizol Corporation
- “Menlo is constantly working to improve its processes based on our company requirements.”

– Linda Johnson, senior logistics analyst, NetApp
- “The cost savings and communication Unyson provides us is dynamite.”

– Dave Kinworthy, supervisor, Kenworth Industries
- “C.H. Robinson is reliable and provides the best pricing for the given situation.”

– Mark Berendes, operations and logistics manager, Davison and Company

Excellent Reader Awards

We could not bestow the Readers' Choice Top 10 3PL Excellence Awards without input from our readers, who are pretty excellent themselves. More than 9,500 readers voted, representing a combined investment of almost 500 hours spent completing the questionnaire. In addition to voting for their favorite 3PLs, readers reported on their experiences with service providers and told us a little about themselves.

To show our gratitude for readers' efforts, we chose 10 surveys at random and awarded the respondents gold Parker pens.

OUR LUCKY READERS ARE:

Shaun Morvant,
Shipping Manager
Diamond Plastics Corporation;
Plaquemine, La.



Nick Buck, *Logistics Manager*
Sappi Fine Paper North America;
South Portland, Maine

Christopher Rainey, *VMI Analyst*
Kraft Foods, Inc.; Wilkes Barre, Pa.

Alex Luczak, *Transportation Coordinator*
Morton Salt; Silver Springs, N.Y.

Patricia Pent,
Purchasing Agent
Pittsburgh Pipe & Supply;
St Louis, Mo.



Dave Constant, *Operations Manager*
Ricola USA, Inc.; Parsippany, N.J.

Larry Faitz, *International Transportation and Customs Manager*
Hallmark Cards Inc.; Kansas City, Mo.

John Bowersox, *Manager,*
PA Distribution, 3PL Relationships
Kohler Co.; Kohler, Wis.

Raymond Allen, *Traffic Supervisor*
Tyco Electronics; Greensboro, N.C.

Tim Kopaniasz, *Supply Chain Manager*
Heinz North America; Pittsburgh, Pa.

TOP 10 3PL EXCELLENCE AWARDS

2010

1 Ryder

WHY THEY WON: IL readers' top-rated 3PL inspires declarations such as, "We only use one 3PL—Ryder. It is the only one that meets our needs" and "By far, the best 3PL company around!"

John Williford, Ryder's president, global supply chain solutions, credits the 3PL's "deep expertise in key industry groups and our commitment to operational excellence" with helping to meet shippers' unique challenges and deliver consistent results.

But Ryder isn't resting on its laurels. "This year, our newly formed Retail/CPG group expanded our capabilities for the flow of goods from Asia, including purchase order management, shipment consolidation in Asia, and deconsolidation in North America," says Williford.

John Snider, vice president of logistics at hardware retailer Do It Best, lauds the Miami-based 3PL's eye for cost savings. "Ryder has been a key component of our cost-control efforts," Snider says. "They are constantly looking at ways to reduce costs and pass on the savings. In one respect, Ryder is just a vendor. But Ryder as a partner is more valuable to us than Ryder as a vendor."

CLIENT ROSTER:

- Toyota
- Shell
- Southeast Milk
- CVS Caremark
- Marco's Pizza
- Pilot Pen Mexico
- General Motors
- Mazda
- Procter & Gamble
- Stonyfield Farm



CASE STUDY: iGPS

Intelligent Global Pooling Systems (iGPS) required a logistics model to support deployment of more than 175 million pallets across its customer base. It turned to Ryder to help design a network where iGPS customer locations—CPG and retailer warehouses—became pallet pooling centers.

Ryder developed an optimization model that worked with the dynamic iGPS network, while managing complicated inventory levels and rapid growth. Ryder tracks pallets in use daily and identifies available pallets at an iGPS customer warehouse that are ready to be re-deployed. Ryder handles all transportation, inventory management, and reverse logistics services, including managing third-party carriers and handling freight bill payment and audit. This strategic partnership has provided iGPS with a highly flexible, scalable solution that can grow with the company as it explores new territories and industries.



2 C.H. Robinson

WHY THEY WON: C.H. Robinson's fans repeatedly praise the Eden Prairie, Minn.-based 3PL's grasp of customer needs. "They exceed the requirement of just moving my cargo—they understand my business," says one reader.

Another satisfied customer is Republic Plastics, a manufacturer of foam tableware and containers with facilities in Texas, Tennessee, and Arizona. "C.H. Robinson consistently understands and exceeds our expectations," says Robert Garner, director of transportation, Republic Plastics. "The representatives we work with are proactive and always seek to improve our operations, which is something that other providers just don't do."

Throughout the economic downturn, C.H. Robinson helped shippers focus on the importance of operating a competitive supply chain, according to **John Wiehoff, CEO and chairman of the board,** and the 3PL plans to maintain that focus as circumstances improve. "Our business model of providing high-service, high-quality logistics services continues to have increasing relevance to many customers who want better information and to manage their freight transportation more efficiently," Wiehoff says.

CLIENT ROSTER:

- Coke
- Frito-Lay
- Republic Plastics
- Dole
- Ocean Spray
- Subway

CASE STUDY: Ocean Spray

Five years ago, beverage brand Ocean Spray chose a Managed TMS solution from TMC, a division of C.H. Robinson Worldwide Inc., to optimize its transportation network. Ocean Spray's on-time deliveries, which have a measurable impact on sales, soon jumped from 85 percent to 95 percent.

While Ocean Spray retained control of its carrier relationships, TMC took over routing guide management. Carriers accepted more tendered loads, which kept freight costs in line. With detailed reporting, Ocean Spray could track costs per load delivered, per mile, and per case—information central to budgeting and pricing.

"TMC is intimately aware of what's going on in our business," says Wayne Tessin, Ocean Spray's director of logistics. "They routinely bring us new ideas, and they fit extremely well with our culture."



3 Menlo Worldwide

WHY THEY WON: Menlo has set out to consistently improve its customers' supply chain performance while driving down total landed costs. The company has also made strides in the 4PL arena, designing and deploying optimized supply chain networks. "Over the past year, we refined and improved our lean capabilities to help customers drive out waste and inefficiency in their supply chains," says **Menlo President Bob Bianco**.



According to *IL* readers, the San Mateo, Calif.-based 3PL's efforts are paying off. "Menlo provides full commitment to our global logistics needs," says one reader. Another remarks, "They are an industry leader, responsive to their customers, innovative in their approach, and committed to delivering quality service."

Ed Melching, director of global logistics at Warrenville, Ill.-based truck manufacturer Navistar Inc., agrees. "Our business relationship with Menlo is intensely collaborative," says Melching. "We've greatly benefited

from the relationship and today we are invested in a new culture, management philosophy, and metrics-based approach to defining success and achieving common goals."

CLIENT ROSTER:

- | | | |
|------------------------------------|------------------------------------|---------------------------------------|
| <input type="radio"/> Caterpillar | <input type="radio"/> HP | <input checked="" type="radio"/> Nike |
| <input type="radio"/> Comcast | <input type="radio"/> Bobcat | <input type="radio"/> Triumph |
| <input type="radio"/> Dow Chemical | <input type="radio"/> Lam Research | <input type="radio"/> Navistar |
| <input type="radio"/> Electrolux | | |



CASE STUDY: Navistar

In 2008, Navistar's supply chain operations spanned three siloed business units, creating inefficiencies that did not support its larger business strategy. Following in-depth research and analysis, the company established and rolled out a five-year plan to fundamentally transform its supply chain, elevate its logistics capabilities, and reduce overall logistics spend by 25 percent by 2013.

As its lead logistics provider, Menlo Worldwide Logistics served as the change agent Navistar needed, and began working with Navistar under a unique strategic collaboration model. Today Menlo, Navistar, and its key suppliers have aligned with this vision and strategy, launched 19 projects that have or will yield validated annual cost savings in the millions of dollars, and generated a five-percent reduction in annual logistics costs.

"With the strategic collaboration model and Menlo's deep expertise in transformative logistics, resources, and best practices, Navistar's supply chain has become a competitive asset that is continually improving and helping to accelerate our growth strategies," says Melching.

4 Transplace

WHY THEY WON: "The 'I Am Transplace' slogan really rings true of our relationship with the 3PL," says Joe Tocci, senior vice president, supply chain and consumer sales, Intertape Polymer Group. "Early on, it was apparent that the account team members, all the way down to the line level, considered themselves part of Intertape."



The Dallas, Texas-based 3PL places high value on customer satisfaction. "We pride ourselves on the ability to not only provide our customers with solutions to fit their specific needs, but also on dedicating ourselves to practice the highest levels of customer service," says **Transplace President and CEO Thomas K. Sanderson**. "We hold our annual customer satisfaction survey results in high regard, and the information enables us to grow and improve year after year."

IL readers celebrate Transplace's "great management, superior technology, assistance with strategy, and excellence at daily execution," as well as its "dedication and ability to solve business challenges."

CLIENT ROSTER:

- | | | |
|---|--------------------------------|---------------------------------------|
| <input type="radio"/> Colgate-Palmolive | <input type="radio"/> RockTenn | <input type="radio"/> Pace Industries |
| <input type="radio"/> Sunny Delight | <input type="radio"/> Walmart | <input type="radio"/> U.S. Gypsum |
| <input type="radio"/> Anna's Linens | <input type="radio"/> DirecTV | <input type="radio"/> Microsoft |
| <input type="radio"/> Barbeques Galore | | |

CASE STUDY: Intertape Polymer Group

Packaging developer and manufacturer Intertape Polymer Group selected Transplace as its strategic logistics provider to help reach two primary supply chain goals: cost control and expertise. Thanks to Transplace's people, processes, and technology, Intertape experienced immediate positive supply chain results.

Intertape's cost per pound improved five percent between 2006 and 2008. By 2009, freight performance measurements had improved by 17.5 percent. With Intertape moving more than 300 million pounds per year, these numbers had a significant impact on cost savings and overall efficiency for the manufacturer.

The Transplace dedicated account team ingrained itself in the process and worked to gain the same knowledge as anyone who worked directly for Intertape. Additionally, the team formed strong relationships with Intertape employees by bringing individuals into projects across the board, from all levels of the company.



TOP 10 3PL EXCELLENCE AWARDS

2010

5 UPS Supply Chain Solutions

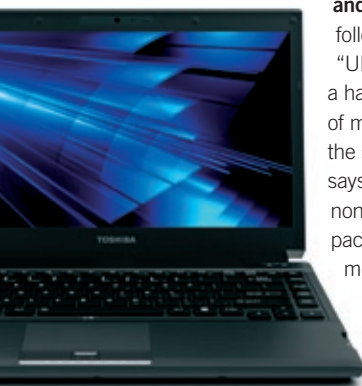
WHY THEY WON: Readers who voted for UPS Supply Chain Solutions cited the Atlanta-based 3PL's "superior customer service and excellence in execution" and "quality product and consistent performance," praising it as "a one-stop services provider and top value for the money."

Brad Reagan, chief operating officer for water sports accessory company Monster Tower, appreciates UPS's dependability and rapid response. "It's reassuring to know that UPS can move inventory quickly when it's necessary, which is critical to a successful business relationship," says Reagan.



Brad Mitchell, UPS vice president, logistics and distribution, credits the 3PL's loyal following to its range of service offerings.

"UPS has strategically become one of only a handful of companies in the world capable of managing all the critical touchpoints of the supply chain process under one brand," says Mitchell. "We provide both asset and non-asset-based transportation—from small package delivery to air and ocean freight movement on global trade lanes, all of which are supported by visibility tools to manage suppliers, inventory, fulfillment, trade compliance, and reverse logistics."



CLIENT ROSTER:

- ☐ March Networks
- ☒ Toshiba
- ☐ Monroe Trucks
- ☐ Convatec
- ☐ Baker & Taylor
- ☐ Anne Fontaine
- ☐ Monster Tower
- ☐ Kingsdown

CASE STUDY: March Networks

March Networks, a provider of intelligent IP video solutions, sought to partner with a global logistics provider that could offer end-to-end supply chain visibility, consistent processes, and accountability for its distribution activities.

To support its customers worldwide, March Networks deploys an advance replacement model to exchange defective units in the field; it is supported by a 48-hour time-in-transit requirement.

UPS' proven track record in reverse logistics and the company's ability to service 99.9 percent of March Networks' installed base within 48 hours led March Networks to partner with the 3PL in early 2009.

6 Exel

WHY THEY WON: When it comes to customer service, Exel tops readers' lists. Typical shipper comments include "excellent, consistent, reliable service from people who care," "outstanding communication and follow-through, and "truly understands our needs."



Customer Owens Corning, a Toledo, Ohio-based building materials manufacturer, shares this experience. "Working with Exel feels like working with an internal department rather than another company delivering a service," says Mike Cramer, director of logistics and customer operations, Owens Corning. "Its personnel communicate to provide insight and become more engaged."

Service excellence doesn't happen by accident. "The customer is at the center of everything we do at Exel," says Mike Gardner, chief development officer. "We use specific processes and tools that allow us to understand and respond to their needs effectively—while retaining an unrelenting focus on operational excellence and core continuous improvement disciplines."

CLIENT ROSTER:

- ☐ 7-Eleven
- ☐ Office Depot
- ☐ DuPont
- ☐ Johnson & Johnson
- ☐ Procter & Gamble
- ☐ GE
- ☒ Chrysler
- ☐ Williams-Sonoma
- ☐ Kraft

CASE STUDY: Novartis

Novartis, a global pharmaceutical manufacturer with U.S. headquarters in New Jersey, recognized the need for a more flexible, agile supply chain that could support varying and expanded distribution strategies. Collaboratively, Novartis and Exel developed a supply chain repositioning plan without disrupting the continuity of supply to customers.

Novartis relocated its warehouse to a site that offered an ideal combination of size and layout to minimize operations costs, gained immediate distribution flexibility via Exel's expansive real estate offering, optimized IT processes and systems, and implemented customer-centric initiatives.

"Volume ramped up quickly, while total costs and cost per unit declined sharply. Continuous improvement programs delivered enhanced security and tracking," says Scott Cubber, Exel's vice president for the life sciences industry. "And, the flexibility achieved enabled Novartis to maintain its high quality standards and remain focused on its core objective: patient care."



TIE BNSF Logistics

WHY THEY WON: Enhancing capabilities to meet shipper demands is the rule at Springdale, Ark.-based BNSF Logistics. "In the past year, we have developed additional skills in large, multi-mode project management and expanded our engineering capabilities to support increased volume in the packaged rail service business," says **Eric Wolfe, vice president and general manager**. "We have emphasized further development of small-package transportation and sortation capabilities, and domestic and international air transportation services."



IL readers praise the 3PL's "immediate response and quick delivery," "excellent service and support," and "good technology and customer interaction."

CLIENT ROSTER:

- | | | |
|--------------------------------------|--|---------------------------------|
| <input type="radio"/> Amazon | <input type="radio"/> Lowe's | <input type="radio"/> Rio Tinto |
| <input type="radio"/> JCPenney | <input type="radio"/> Mitsubishi Power Systems | <input type="radio"/> Kohl's |
| <input type="radio"/> The Home Depot | <input type="radio"/> Morton International | <input type="radio"/> Walmart |

CASE STUDY: Gamesa Wind USA

BNSF Logistics began working with the U.S. operation of Spanish wind turbine power generator Gamesa in 2009. Gamesa Wind USA imported wind generator towers through the Port of Houston, Texas, and sourced other parts from its manufacturing facility in Pennsylvania. BNSF Logistics managed the rail and over-the-road transportation of components from the port and manufacturers to support the development of an Illinois wind farm.

BNSF Logistics completed the delivery of 147 wind components to a nine-acre transloading and distribution operation in Illinois. The tower sections were trucked to a transload site, where they were loaded onto railcars. BNSF Logistics' in-house engineering team created a detailed plan of where each component would be stowed in the distribution operation. As the components arrived, they were transloaded off the railcar and either stowed in the yard or directly loaded onto outbound trucks for delivery to the Illinois wind farm installation field.



TIE J.B. Hunt

WHY THEY WON: "J.B. Hunt never stops looking for innovative ways to better meet our customers' demands, particularly as it pertains to technology," says **Shelley Simpson, president, Integrated Capacity Solutions, and executive vice president, J.B. Hunt Transport Services**. "During the past year, we have either purchased or developed proprietary technology that provides better shipment tracking and inventory management."



Readers praise the Lowell, Ark.-based 3PL's technology leadership. "J.B. Hunt combined innovative ideas and technology with a thorough understanding of my company's needs, and they tailor services to solve and serve those needs," says one reader.

"They have helped me remove cost and improve service to my customer base, which is the key to growing and expanding my business," remarks another.

CLIENT ROSTER:

- | | | |
|--|---|---|
| <input type="radio"/> Amazon | <input type="radio"/> Standard Register | <input checked="" type="radio"/> Target |
| <input type="radio"/> Coca Cola | <input type="radio"/> Walmart | <input type="radio"/> Petco |
| <input type="radio"/> Federated Stores | <input type="radio"/> International Paper | <input type="radio"/> Scotts |
| <input type="radio"/> Frito Lay | | |

CASE STUDY: Standard Register

Standard Register, a document management services company, had a decentralized supply chain with distributed decision-making across what was primarily a brokered model. Routing, carrier management, and shipment visibility was fragmented with minimal mode or lane optimization and little visibility into carrier performance. Its primary objective in working with J.B. Hunt was two-fold: Improve the economic value related to the service and cost relationship; and better manage its value proposition to the point of delivery through metrics, measurement methodology, and reporting.

J.B. Hunt delivered a customized transportation management platform to consolidate all Standard Register facilities into a centralized supply chain management strategy. By incorporating carrier selection, mode optimization, shipment and carrier tender, cost and shipment visibility, scheduling, and KPI reporting, J.B. Hunt increased on-time performance and significantly reduced transportation spend.

"I have found J.B. Hunt to be a progressive supply chain partner for Standard Register," says Greg Greve, Standard Register's vice president, sourcing. "It has actively engaged in our transformation from a traditional printer to a market-focused solutions provider. From operational performance to executive engagement, J.B. Hunt is both a dependable and valued partner."



TOP 10 3PL EXCELLENCE AWARDS

2010

8 Landstar

WHY THEY WON: Readers rave about Landstar's "honesty and integrity," "execution and responsiveness," and "commitment to excellence."

But shippers such as Landstar customer Grupo Antolin, a global automotive supplier based in Spain, especially appreciate the benefits they reap from the Jacksonville, Fla.-based 3PL's investment in real-time technology.



"Customers are looking for improved methods of getting more accomplished with less staff and capital investment," says **Landstar Chairman, President, and CEO Henry Gerkens**. "Logistics companies are using technology solutions to help customers manage their supply chains by coordinating bidding, scheduling, shipping, tracking, invoicing, and reporting.

"Landstar invested in two advanced technology companies—NLM and A3i—to provide customers with two unique Web-based software-as-a-service applications that are designed to meet all their supply chain needs," Gerkens adds.

CASE STUDY: A Leading Beverage Company

A major North American beverage company having difficulty finding trucks in today's marketplace asked Landstar for support in sourcing and managing additional capacity beyond the normal reach of its carrier partners.

Landstar is supporting the company's logistics network by providing transportation capacity sourcing and procurement tools and related supply chain management, in part through software-as-a-service solutions.

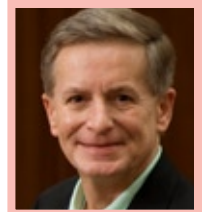
Landstar's logistics expertise and capabilities, combined with its leading-edge technology solutions, enable shippers to meet their supply chain challenges, particularly in a marketplace where capacity is scarce.



Landstar supply chain services demonstration

9 Penske Logistics

WHY THEY WON: "Penske Logistics places a relentless focus on the customer experience and value creation," says **Vince Hartnett, president, Penske Logistics**.



"Relationship and goal alignment are key elements because we work very closely with our customers at all levels to ascertain both their short-term and long-term strategic direction."

Reader comments support Hartnett's assertions about Penske's approach. "They go above and beyond and treat our business like their own," says one shipper. "Penske Logistics works hard to understand our company's needs and business model," says another. A third praises Penske Logistics' "best-in-class solutions and people."



Offering shippers the services they need is a priority for the Reading, Pa.-based 3PL. "Penske Logistics took a focused look at each of our product lines to ensure that the services we offer provided the most value," says Hartnett. "We aligned our business operations with the respective product lines. For example, Penske recently launched a new labor management program designed to streamline warehouse efficiency, and reduce waste and cost within the customer's supply chain. As a result of this successful implementation, some of our customers have experienced 15- to 25-percent productivity gains in a three- to four-month period."

CLIENT ROSTER:

- Goodyear
- Merck
- Sony
- Cardinal Health
- Ford

CASE STUDY: Cardinal Health

Penske Logistics and global healthcare manufacturer and distributor Cardinal Health have been working together for more than 20 years. Since 2008, Penske Logistics has managed dedicated contract carriage services for Cardinal Health's medical products distribution business, which serves hospitals, clinics, surgery centers, labs, and physician's offices. Over the past two years, Cardinal Health outsourced the management of its private fleet to Penske Logistics.

Today, they're focused on improving outbound distribution network and transportation efficiency, while maintaining a close eye on the critical nature of service required to support healthcare customers. Initial results show fleet utilization has increased, vehicle fuel efficiency has improved, empty miles/backhauls have decreased, and additional synergies have been created with key suppliers.

10^{TIE} TLC

WHY THEY WON: TLC President Pete Westermann

credits the company's team of supply chain operators with being committed to serving clients as if they were the clients' actual employees. "We have been working hard at our company culture for more than a century and take great pride that our people are our key differentiator," says Westermann. "What really makes it all work is our people, and how we have them involved in your businesses."

IL readers' comments reflect the Holland, Mich.-based 3PL's efforts to incorporate its associates into the business improvement process. "TLC has a clear focus on clients' vision and business goals," notes one shipper. "They are courteous, hard working, and strive for excellence in every aspect of the transportation and warehousing cycle," remarks another.

The 3PL also garners kudos for its "friendly personnel, quick response times, and on-time deliveries," "ease of doing business and loyalty," and "attention to detail and follow-up."



CLIENT ROSTER:

- ☐ Sara Lee
- ☐ General Mills
- ☐ PepsiCo
- ☐ Kraft Foods
- ☐ Maple Leaf Frozen Bakery
- ☒ Georgia Pacific
- ☐ Dean Foods
- ☐ Kellogg Company
- ☐ ConAgra Foods
- ☐ Johnsonville Sausage

CASE STUDY: Athens Packaging

In 2004, Athens Packaging, one of the nation's largest food producers, needed help with its underutilized food packaging facility near Athens, Ga. The company turned to TLC and found a proven, strategic partner-buyer with a solid history of high-speed manufacturing and packaging excellence.

TLC assumed operation of this 25-line, multi-format facility and transitioned it into a highly flexible contract packaging facility serving multiple national and regional food manufacturers.

Since taking over this facility, TLC has worked closely with Athens

Packaging to maximize efficiency and exceed KPIs, and has recently earned the Safe Quality Food (SQF) Institute's 2000 Level 3 certification.



10^{TIE} Unyson

WHY THEY WON: "Unyson

sets itself apart with our commitment to guaranteed savings and industry-leading technology," says **Donald Maltby, executive vice president of logistics service**. "We meet customer demands by customizing our solution to fit their needs, developing proprietary technology to enhance their supply chains, and focusing on continuous improvements."

These efforts are benefiting Unyson customers such as Chicago-based consumer packaging producer Rexam Plastics. "Unyson provides Rexam Plastics with streamlined processes and increased efficiencies," says Scott Vrablik, vice president of supply chain, Rexam Plastics. "Unyson also implemented best practices and has established key metrics to improve service levels."

Readers celebrate Downers Grove, Ill.-based Unyson's "innovative, cost-saving solutions," "fast response and follow-through," "outstanding service and competitive pricing," and "ability to get any job done."



CLIENT ROSTER:

- ☐ Big Lots
- ☐ Energizer
- ☒ General Mills
- ☐ Ingersoll Rand
- ☐ Oatey Corporation
- ☐ Owens Corning
- ☐ Rexam Plastics
- ☐ The Home Depot
- ☐ Toys "R" Us
- ☐ WD 40 Company

CASE STUDY: WD-40 Company

WD-40 Company, the San Diego, Calif.-based maker of the toolbox staple, began to revamp its supply chain strategy to drive costs from its network and improve customer service levels. The company hoped to achieve these goals by outsourcing the tactical execution of its strategic transportation program.

Unyson Logistics provided a full transportation solution to manage the various components of WD-40 Company's network. The 3PL used its TMS to control and optimize shipments through effective carrier/mode/service selection, pool distribution, and consolidation strategies. Unyson's comprehensive service offering included: Web-based shipment visibility, freight bill payment and audit; continuous improvement management; and performance measurement and reporting. Because Unyson delivered savings without sacrificing service, WD-40 has realized transportation savings of more than 18 percent, with a 20-percent increase in on-time customer delivery.

3PL

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| <input type="checkbox"/> Bulk Connection | <input type="checkbox"/> Osborne Logistics Group |
| <input type="checkbox"/> C.H. Robinson Worldwide | <input type="checkbox"/> Pacer Distribution Services |
| <input type="checkbox"/> Cardinal Logistics | <input type="checkbox"/> Penske Logistics |
| <input type="checkbox"/> Caterpillar Logistics Services | <input type="checkbox"/> Performance Team |
| <input type="checkbox"/> Corporate Traffic | <input type="checkbox"/> Phoenix |
| <input type="checkbox"/> Crowley | <input type="checkbox"/> Port Jersey Logistics |
| <input type="checkbox"/> CRST | <input type="checkbox"/> RMX Global Logistics |
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| <input type="checkbox"/> Kenco Logistic Services | <input type="checkbox"/> Werner |
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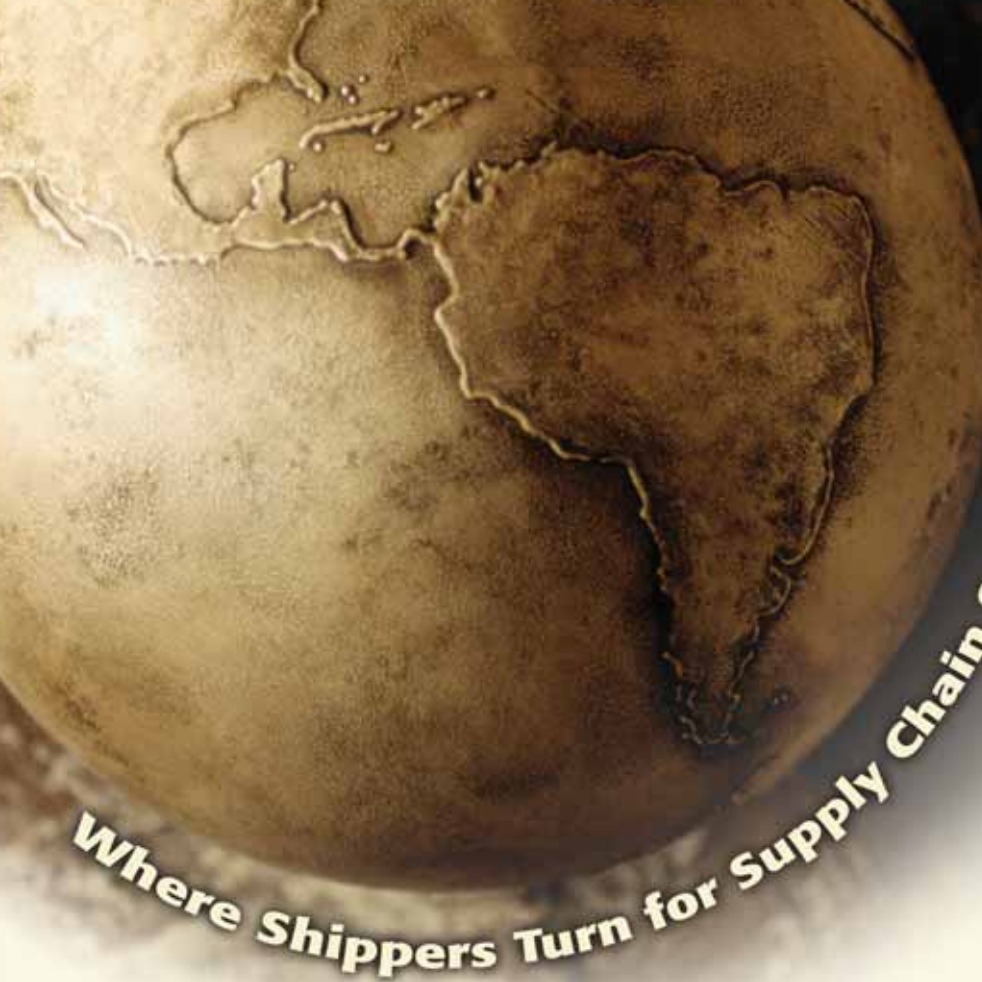
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When shippers need to move cargo bigger, more fragile, or more... well, alive, than what they typically handle, the only place to turn is to a specialist. Many 3PLs and carriers offer project logistics divisions specializing in tricky, oversized, or delicate loads. From whales to priceless artifacts, these service providers have seen it all. Take a look at a few offbeat project cargo moves that have crossed their paths.

“YOU MOVED WHAT?”

ADVENTURES
IN PROJECT
LOGISTICS

BY CATHERINE HARDEN

July 2010 • Inbound Logistics 123



CARGO

A STATUE OF THE EGYPTIAN GOD

ANUBIS

ORIGIN	DESTINATION	3PL
Toronto, Canada	New York City, N.Y.	TransGroup Worldwide Logistics

PROJECT BRIEF

Part of the traveling exhibit “Tutankhamun: The Golden King and the Great Pharaohs,” the five-ton, 25-foot-tall fiberglass and steel statue rode from Toronto to Brooklyn on a flatbed, then sailed around the New York Harbor on its way to join the rest of the exhibit in Times Square.

CARGO

A PAIR OF
WHITE WHALES

ORIGIN	DESTINATION
Moscow, Russia	Beijing, China

CARRIER

AirBridgeCargo Airlines (ABC)

PROJECT BRIEF

The airline carried the two creatures, which weigh a combined six tons, in a special water-filled transport container on board a Boeing 747-400 freighter. The following day, ABC transported four dolphins on the same route between Russia and China. The airline’s other animal passengers have included 1,275 pigs from Canada; 380 cows from Australia; and 105 horses from The Netherlands, all of which ABC delivered to Russia.

CARGO

THE WORLD’S LARGEST
NON-RIGID AIRSHIP

ORIGIN	DESTINATION
Alexander City, Ala.	Montgomery Coliseum; Montgomery, Ala.

3PL

Mallory Alexander International Logistics

PROJECT BRIEF

Large enough to fill most of a conventional football stadium when inflated, the 230-foot-long, 65-foot diameter “Bullet 580 Airship” was designed to fly four times higher and longer than a conventional airship. Its first journey, however, was a short trip of just 50 miles. The airship’s designer and builder, E Green Technologies, called on Mallory Alexander to transport the airship, which traveled on a specialized loading frame via flatbed truck to the Montgomery Coliseum. There, E Green inflated the airship and checked its custom mountings and structures. The next step is an actual flight test, which the company hopes to conduct at Florida’s Kennedy Space Center.



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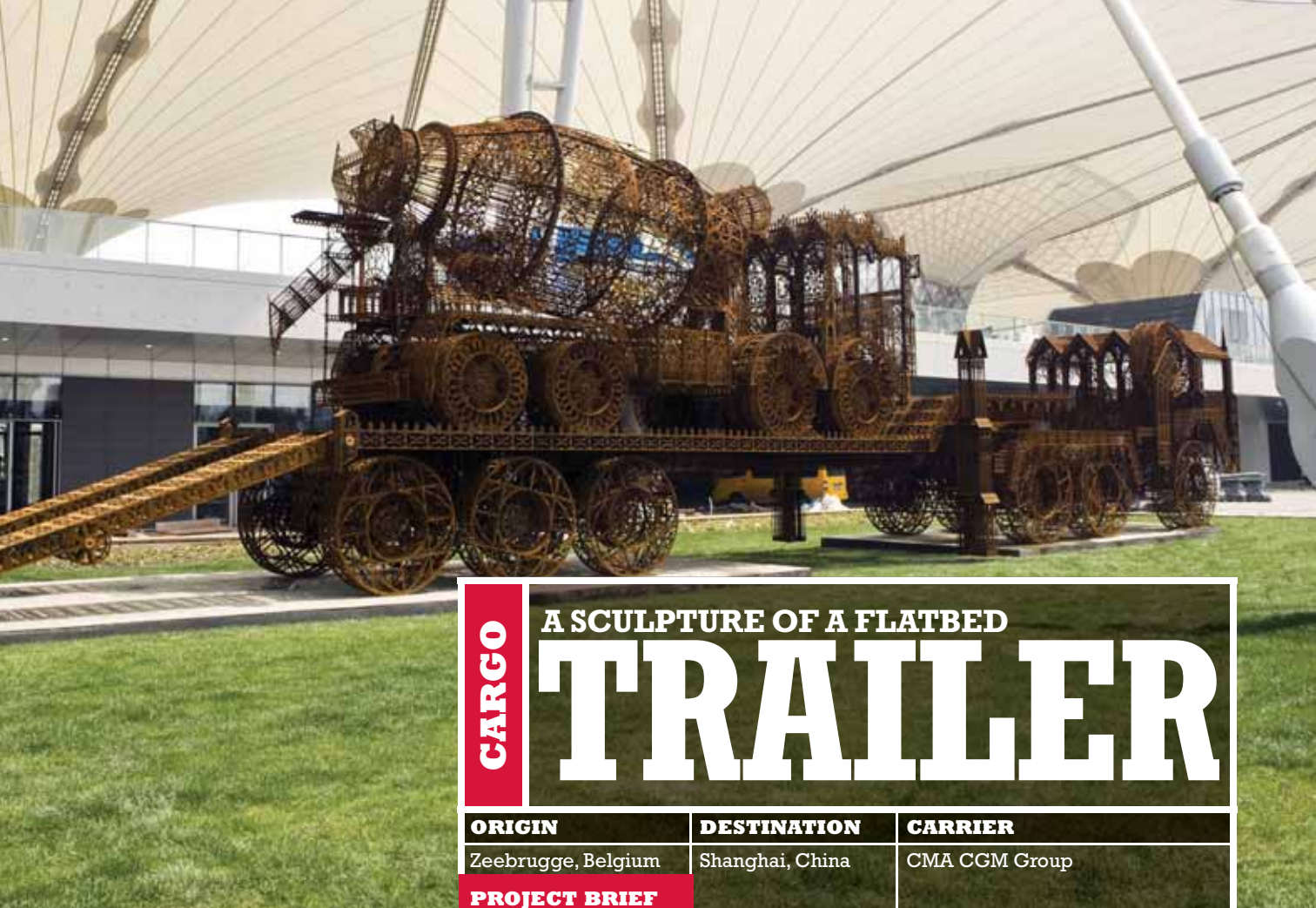
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CARGO

A SCULPTURE OF A FLATBED

TRAILER

ORIGIN

Zeebrugge, Belgium

DESTINATION

Shanghai, China

CARRIER

CMA CGM Group

PROJECT BRIEF

Entitled "Flatbed Trailer," the sculpture by Belgian artist Wim Delvoye depicts life-size replicas of a flatbed trailer and a cement truck in laser-cut steel with Gothic-style embellishments. The sculpture was loaded on three 40-TEU flat rack containers. Along with four other sculptures destined for the Shanghai World Expo, "Flatbed Trailer" sailed aboard the *CMA CGM Fidelio* between Zeebrugge and Shanghai on the French Asia Line service.

CARGO

A GERMAN TANDEM-X SATELLITE

ORIGIN

Munich, Germany

DESTINATION

Baikonur Cosmodrome;
Kazakhstan

CARRIER

Volga-Dnepr Airlines

PROJECT BRIEF

After a two-hour loading process, the 40-ton satellite and its auxiliary equipment traveled on a freighter under closely monitored temperature and pressure conditions. The TanDEM-X launched in June 2010 and will spend three years gathering data for a digital elevation model portraying the Earth's land masses.

CARGO

TEMPORARY AIRPORT TERMINALS

ORIGIN

Germany

DESTINATION

Port Elizabeth and
Bloemfontein, South Africa

CARRIER

Siemens Mobility Division



PROJECT BRIEF

Expecting players and spectators from all over the world to fly in for the 2010 World Cup, operating company Airports Company South Africa ordered two temporary CapacityPlus terminals. Siemens Mobility Division transported and set up the pair of 19,375-square-foot terminals, each of which can handle up to 4,000 passengers daily and accommodates all standards of the International Air Transport Association, including an arrivals area with baggage claim, departures area with check-in counters and baggage conveyance system, and personal security checks.

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CARGO

TV PRODUCTION TRUCKS

ORIGIN
Vancouver, Canada
DESTINATION
Durban, South Africa, and Zeebrugge, Belgium
CARRIER
Wallenius Wilhelmsen Lines
PROJECT BRIEF

Alfacam, a Belgium-based TV facilities company, shipped 12 audio-visual production trucks via the Port of Tacoma. The trucks, which were used to broadcast the 2010 Winter Olympics in Vancouver, were sent to their next assignments: five trucks to South Africa to broadcast the World Cup, and seven to Belgium for assorted other jobs.

CARGO		
WIND TURBINE BLADES		
ORIGIN	DESTINATION	3PL
Tianjin, China	Skrydstrup Vojens Danish Military Airport	Geodis Wilson
PROJECT BRIEF		
Manufacturer LM Wind Power tapped Geodis Wilson to transport two 138-foot-long wind turbine blades, believed to be the longest cargo pieces ever flown by an aircraft. Beginning with inland transportation from the LM Wind Power manufacturing plant in Tianjin to Tianjin Airport, China, the intricate move involved loading the blades onto the world's largest freight aircraft, a Russian-made Antonov AN-225; customs clearance; and supervising unloading and final delivery at a Danish military airport, the only airport in Denmark capable of handling the large move.		

CARGO		
ANCIENT ARTIFACTS		
ORIGIN	DESTINATION	CARRIER
Egypt	Philadelphia, Pa.	APL
PROJECT BRIEF		
Collected for the exhibition "Cleopatra: The Search for the Last Queen of Egypt," 142 artifacts, including an array of ancient tools and a pair of colossal red granite statues with a combined weight approaching five tons, made a 5,592-mile ocean voyage in two 40-foot shipping containers. APL project teams from Egypt, Dubai, the United States, and Singapore worked closely with the exhibit's organizers and Egypt's Supreme Council of Antiquities, which assigned a representative to accompany the artifacts on their journey.		

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East Coast Warehouse is a leading third-party logistics provider for over 150 customers, many of whom are import-based. For their day-to-day operations, they must be able to **manage the throughput of thousands of pallets in their combined 1.7 million square foot locations in New Jersey, under temperature-controlled conditions and unyielding pressure.** To improve their efficiencies, East Coast Warehouse raised their operations to new levels with customized materials handling solutions from Raymond and a solid commitment from our authorized sales and service center, Raymond of New Jersey.

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CARGO

COLD BOXES

ORIGIN	DESTINATION	CARRIER
Houston, Texas	West Africa	Intermarine

PROJECT BRIEF

The 700-ton cold boxes, used in liquefied natural gas production, traveled by barge from a fabrication plant in New Iberia, La., to Houston, where they were transloaded to a specialized Ro/Ro semi-submersible vessel via self-propelled multi-axle heavy lift trailers (SPMTs). As the trailers rolled across the ramp and onto the ship, computer-controlled resting pads adjusted their position to keep the load pressure equalized. Then the boxes were lowered onto specially fabricated stands that held the boxes while the SPMTs were removed and transferred the weight to the vessel's structural ribs.

CARGO

YACHTS

ORIGIN	DESTINATION	CARRIER
Various	The Bahrain Boat Show International; Bahrain	GAC Bahrain

PROJECT BRIEF

In addition to coordinating exhibition stands and equipment, GAC Bahrain transported 17 vessels such as *Silver Zwei*, the world's fastest conventional powered boat, and luxury yacht *Linda Lou* to the Persian Gulf island's second annual boat show. The watercraft measured up to 230 feet long and required simultaneous operations via sea and road from various origin points.

BIGGER? WEIRDER? TRICKIER?

Do you have a project logistics story that tops these extraordinary moves? We want to hear about it! Fill us in at editorial@inboundlogistics.com.



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FACING LOGISTICS CHALLENGES? USE IL'S 3PL EXPERTS AND



QUESTIONS & ANSWERS

Brigadier General John O'Connor

THE AMAZING RACE

Inbound Logistics goes behind the scenes of a five-month pursuit to move the U.S. military from Iraq to Afghanistan with Brigadier General John O'Connor, director of logistics, Third Army, and commanding general of the Army Materiel Command.

by Joseph O'Reilly

July 2010 • *Inbound Logistics* 133



QUESTIONS & ANSWERS

Brigadier General John O'Connor

What does it take to move an army? It's the silver bullet question that has dogged military commanders throughout the course of history, from Alexander the Great to General Patton, and more recently Generals Swarzkopf and Petraeus.

The U.S. military is currently in the middle of a race to reposition assets and soldiers as part of President Obama's directive to scale operations in Iraq and build up forces in Afghanistan.

Active in Afghanistan since 2001, and Iraq since 2003, the U.S. military faces a monumental task drawing down activity in one theater and expanding in another. In terms of scope and magnitude, the Department of Defense and its commercial partners are working toward a charter of redistributing 3.4 million pieces of equipment by Aug. 31, 2010. This involves the redistribution of 2.8 million assets from Iraq, including 88,000 containers and 41,000 vehicles of all types.

As of July 2010, the military had redistributed 2.2 million pieces out of more than 350 forward operating bases in Iraq, leaving an additional 1.2 million items to be moved by August. It's a constant, ongoing process of identifying the future needs of each piece of equipment, then positioning accordingly.

From airlifted armaments to tents and construction materials crated in ocean-going containers, via contracted "jingle" trucks and the antiquated Soviet rail lines of Uzbekistan, the Third Army is orchestrating a supply chain exodus spanning thousands of

miles through countless countries—all within a five-month window between March and August 2010.

It's a complex mission that involves service members, civilians, and government contractors, leveraging the shared expertise of the Army's Materiel Command, the Defense Logistics Agency, and Transportation Command to expand an existing theater of operations and ensure soldiers have necessary resources at the right place, right time, and in the right quantities.

Inbound Logistics recently spoke with Brigadier General John O'Connor, director of logistics, Third Army/Army Central Command and commanding general for the Army Materiel Command, based in Kuwait, to get a status report on how the U.S. military is managing this redeployment of assets.

Q What is the role of the Third Army, and yours specifically, in managing the drawdown in Iraq and build-up in Afghanistan?

A Our responsibility as the Third Army is to set the theater in accordance with the Commander in Chief's priorities and guidance. President Obama's current guidance is to draw down forces in Iraq to 50,000 and build up forces in Afghanistan by 30,000 to 98,000.

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QUESTIONS & ANSWERS

Brigadier General John O'Connor

Third Army's role, my role, is to help synchronize and support field commander priorities. Here in Kuwait, we act as the center of gravity for all things logistics. To ensure we provide proper synchronization, we have developed some very detailed plans to draw down and build up resources in these theaters and to provide necessary flexibility in that plan in case of outside contingencies—from erupting volcanoes to flooding in Kyrgyzstan.

of 30,000 in Operation Enduring Freedom and we have to move 5,100 pieces of equipment—60 percent of that will come from here in theater, 40 percent will come from the United States.

To facilitate this, we've established forward command posts both in Iraq and Afghanistan—our ARCENT (Army Component of U.S. Central Command) coordination support elements. This helps integrate decision-making going into Afghanistan, as well

Surplus Property—to help us with this responsible drawdown of forces from Iraq. This way we can turn over equipment that is excess to our requirements but may not be excess to requirements in the United States. We have states involved, as well as the governments of both Iraq and Afghanistan, as we transfer assets to help them stabilize and provide a secure environment for their forces.

In doing this, we go through a four-



Brigadier General John O'Connor, director of logistics, Third Army (center), discusses logistics operations with his troops and Major General Ali Mohammed Al-Ateeqi, logistics commander, Kuwaiti Army (third from right).

From a logistics perspective, this is probably one of the most complicated and dynamic maneuvers in modern history. We recognize that we can't do this alone. We are part of a team of teams. Our job is to orchestrate this complex operation, integrating and prioritizing the movements of people and equipment through multiple information databases and systems to make sure we have accountability, visibility, and oversight in support of our war fighters.

We're currently building up a force

as give disposition to all the equipment coming out of Iraq so that it gets back to our army in time to reset and refit for future operations.

Q What controls and measures are in place to prioritize and redistribute the flow of materials into and out of these theaters?

A We are learning a lot as we go along. For example, we recently set up a new organization—the National Association of State Agencies for

step process: consume what is already here; redistribute assets within Iraq and Afghanistan, or one of the other 20 countries we oversee; transfer equipment to other governments through foreign military sales or excess defense article transfers; and turn equipment over to the Defense Logistics Agency for disposal and demilitarization.

Since third quarter fiscal year 2009, we've drawn down 68 percent of stocks in Iraq. We've reduced ammunition stocks in Iraq by about 73 percent. We've reduced our vehicles by about 30,000 and we've also brought down 700,000 non-rolling-stock items. We've also transferred 738

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QUESTIONS & ANSWERS

Brigadier General John O'Connor

items to the government of Iraq, which has generated approximately \$77 million in sales.

Our biggest challenge is working against the clock. August is critical for both theaters. Our success will be contingent on the flexibility we have in making good running estimates—so we can make adjustments to the plan and leverage the great work of our commercial partners.

Q How is history and experience helping you plan for a military move that might surpass historical precedence?

A One initiative we took was to establish ARCENT support elements in Iraq and Afghanistan to help coordinate and project unforeseen requirements that may come along.

When you look at history, this

is no different than what we did in Operation Desert Shield and Operation Desert Storm. General Pagonis was the kingpin in orchestrating Desert Farewell, what he called one of the toughest parts of any operation—the last phase of retrograde, removing all forces and equipment from the theater. That's the process we're in as we look to build accountability, visibility, and control over this operation.

Also reflecting history, General Webster, Third Army Commander, has designated this effort Nickel II. During World War II, when General Patton swung his forces to support the Battle of the Bulge in the Ardennes, he had a code word to initiate this operation: Nickel. That's all he had to say and all his division commanders knew what it meant—to withdraw from current operations and execute this new mission against German forces in the Ardennes.

We're seeing Nickel II happen in a similar fashion.

It parallels a lot of what we learned in Desert Farewell in the early 1990s. General Pagonis leaned on Army Materiel Command to help execute that mission and during Desert Storm they stood up a redistribution retrograde facility in King Khalid Military City. It required centralized planning and decentralized execution.

We have turned Army Materiel Command again, and established a responsible reset task force led by Lieutenant General Pillsbury at Fort Belvoir, Va. He has forward deployed about 30 personnel to Kuwait to help shape and guide our drawdown of forces in Iraq. We've been given dates when we need to be out to make sure we have accountability systems in place, leave nothing behind, and get our forces into Afghanistan.

Even back in Vietnam we stood up organizations such as the Pacific Utilization Redistribution Agency

Spc. Robert-Lee Pass, a heavy expanded mobility truck wrecker, performs preventive maintenance. A member of the 116th Combat Heavy Equipment Transportation Company, his unit plays an important role in the Third Army's responsible drawdown of Iraq.



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QUESTIONS & ANSWERS

Brigadier General John O'Connor

in Okinawa to handle all the equipment coming out of that theater. After every major operation, billions of dollars worth of equipment has to be accounted for and critical decisions need to be made. Often, procedures are not in place and have to be quickly developed. We're doing that, writing orders to give guidance to forces in the field on how to get disposition on equipment and what to do with it.

Q How is technology helping the military control and track assets?

A Industry uses the term 'reverse logistics.' It's no different in the military. We leverage all the tools available to us to get rapid disposition to our forces as we manage the multitude and magnitude of all this equipment moving both in and out of the theater.

We have developed our own homegrown system called the ARCENT-Theater Common Operating Picture. This is essentially an Oracle database that ties together our automation systems for property accountability and distribution of equipment and personnel moving in the defense transportation network. All these systems feed the database.

The system gives us visibility, generates reports, and provides updates to our customers—whether TRANSCOM, CENTCOM, ACOM, or the Defense Logistics Agency—so they have transportation and supply chain visibility. It also gives us predictive analysis as we make changes to our plans. It's a combat and force multiplier.

We also use a system called the Army War Reserve Deployment System (AWRDS) that takes our equipment from retail, at the unit level, and moves it up to wholesale. This is another database that allows us to quickly move equipment in and out, get visibility and a wholesale perspective, so we can track and make decisions on equipment.



Sgt. Kelly Collier, loadmaster, 816th Expeditionary Airlift Squadron, secures a mine-resistant ambush protected vehicle into the back of an aircraft destined for Afghanistan.

All of this moves through common RFID systems and other tagging that allows the defense supply chain to reap the benefits of commercial industry technology as well as systems of record within our own formations. Technology plays an important role on the ground and remotely as we work through this complex environment.

Q What role has the private sector played in this operation?

A One of my roles prior to coming into this position was as deputy commander for surface deployment and distribution command, which is a component of U.S. transportation demand. So I have been able to apply these experiences and lessons learned.

Nothing happens unless something moves. So we are dependent on commercial ocean carrier partners such as APL, Maersk, Liberty Lines, and Hapag-Lloyd and air cargo companies including FedEx and UPS.

Certain laws guide the distribution of cargo; for example, the Cargo Preference Act of 1904. This requires all items procured or owned by the U.S. military to be carried exclusively by U.S.-flagged carriers at reasonable rates. The Cargo Preference Act of 1954 stipulates that at least 50 percent of all tonnage generated by government needs to be transported on privately owned U.S.-flagged vessels. This is a

policy we strictly adhere to in support of the private sector.

For Desert Shield and Desert Storm, we used a lot of 'grey-bottomed vessels' [i.e. U.S. Navy]. In this operation, we've been able to leverage our commercial partners 100 percent in the distribution to and from the theater of operation. The private sector plays a tremendous role in deploying and redeploying our equipment.

We used to do a port-to-port model, now we've moved to a door-to-door model. That's where our commercial partners go right to the port and deliver to the foxhole. All of that is being leveraged under the auspices of the U.S. Transportation Command Universal Services Contract—which provides us the opportunity to book cargo against best value, opening up contractual arrangements with many vendors.

We essentially buy space. When we need to move something, we offer up cargo. We may not need the whole ship, but we can put cargo on a specific vessel and we let the carriers work out the details on how much space we get and how many ships we need.

The same works for surface transportation. Moving up the theater into Afghanistan we use 'jingle trucks' and regional transport contracts to support operations where we don't have U.S. forces or need to augment operations because the scope and magnitude far exceeds the military's capacity.

Q How do you prepare for the unexpected?

A It would be nice to have a crystal ball to project future requirements, but every good military operation requires a great plan. Many times the first casualty of an operation is the plan. You have redundancies in place, which is well-demonstrated in our efforts to open up operations through the central Asian states.

For example, when we were originally operating in Afghanistan, 100 percent of our cargo until 2008 moved through the Port of Karachi in Pakistan. In less than one year, we've now moved 13,000 containers across the northern distribution network, leveraging the central Asian states—Russia, all of the 'stans,' Azerbaijan, Georgia, Turkey—so we now have additional gateways to come into northern and southern Afghanistan.

We have shifted 60 percent of our deliveries to the northern distribution network through all the diplomatic agreements we have established with our partners in support of Operation Enduring Freedom.

In terms of operational flexibility, every day we come to work looking for another way to do our business because we know that at any time we can lose important grounds of communication—Pakistan, for example. We might have to turn to other countries to get our equipment in to support that operation. We continue to aggressively engage all the nations that surround Iraq and Afghanistan to allow us that flexibility and agility to support our forces at any time in the event we lose a major line of communication.

As good military planners, it is our responsibility to prepare for contingencies in every place where we have a node that could potentially be impacted by a diplomatic or political incident. ■



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Ties That Bind

Sewing Up U.S.-Canada Trade

While security inspections and heavy traffic might needle shippers, new infrastructure projects could help keep cross-border trade from unraveling.

by Merrill Douglas

Nearly 4,000 miles of border separate Canada and the contiguous United States, but a steady stream of goods passing north and south across that boundary stitches the two nations tightly together. In 2009, the United States shipped \$204.7 billion worth of goods to its largest trading partner, Canada, according to the U.S. Census Bureau. Canada reciprocated with \$224.9 billion worth of shipments to the United States.

Even in this closest of trade relationships, maintaining that steady flow across the border isn't simple. That's especially true in today's security-conscious world.

Seventy percent of trade between the United States and Canada crosses the border by truck, according to the U.S. Commercial Service. For highway freight, the short drive through a port of entry may be the hardest part of the international trip. Security inspections and heavy traffic combine to produce long waits at popular crossings. New security requirements, such as electronic manifests for loads and passports for drivers, also complicate cross-border trade.

On the plus side, plans are in the works to upgrade facilities at some of the busiest land crossings. When complete, these plans could simplify cross-border moves. Upcoming improvements to rail infrastructure and new intermodal facilities near the St. Lawrence Seaway could also spell good news for international shippers.

Here's a look at some recent cross-border trade developments.

THE BORDER THICKENS

The U.S.-Canada border hasn't gotten longer, but common wisdom holds that since the Sept. 11 terrorist attacks, it has grown thicker, especially for southbound trade. One important new requirement in recent years demands that highway carriers entering the United States file an electronic truck manifest with U.S. Customs and Border Protection (CBP) using the Automated Commercial Environment (ACE) system. CBP introduced the truck e-Manifest in 2007.

The rule creates extra administrative steps for shippers, says Paul McKenty, logistics manager at Grace Canada in Ajax, Ontario. Grace Canada ships eight to 10 truckloads of construction products per day into the United States.

"We have to notify U.S. Customs that our goods are coming into the United States, and provide the truck and trailer numbers, the contents of the trailer, and the driver's name," McKenty says. "And the driver has to have a passport."

The shipper also must specify which international port the truck will use and what time it will arrive. In addition, the truck must not leave the dock until CBP gives permission to ship.

The United States requires two kinds of electronic filings. While a trucking company reports the contents of its trailer, the shipper files an electronic declaration to CBP with details on its own load, using the Pre-Arrival Processing System (PAPS). The two declarations must match.

"U.S. Customs has implemented new programs to check whether the data we send them is the same data transmitted by the carrier," says Christine Lemieux, director of international operations for Cascades, a paper and plastic products manufacturer in Kingsey Falls, Quebec. Any discrepancies can trigger delays.

Coordinating Customs declarations with e-Manifests becomes especially tricky for less-than-truckload (LTL) car-

States has become more difficult, says Lemieux.

Before the filing regulations were implemented, Cascades cleared many loads through CBP under a line release—a provision to streamline repetitive, high-volume shipments of certain commodities. "We just had to present our paperwork at the border," Lemieux says. "Customs would scan the bar code, and the shipment was cleared to enter the United States. The driver could leave the plant with a load at any time."

Today, Cascades transmits information about its loads in advance, and CBP must release the cargo before a truck arrives at the port of entry. It's a delicate bit of coordination for some of the company's plants, which are only one hour from the border. Using an electronic data interchange system helps, Lemieux says, "but it's costly."

Cascades, which manufactures boxes, tissue paper, packaging, plastics, and



Quebec-based manufacturer Cascades exports about 60,000 shipments to the United States each year using its private fleet and contract carriers. Filing Customs documents electronically has proven costly for the shipper.

riers, says Kevin Gavin, vice president of supply chain management at Integrated Export Systems (IES), a Midland Park, N.J.-based software developer. One manifest covers the whole trailer, but the Customs declarations come from multiple LTL shippers.

"All the documents have to match, or the whole truck could be delayed," says Gavin.

Electronic filing was supposed to increase both safety and efficiency at the border. But entering the United

other products in North America and Europe, sends about 60,000 shipments from Canada to the United States each year. It operates its own fleet of trucks and also contracts with other carriers.

Crossing into Canada is simpler than crossing into the United States today, but that will change when Canada introduces the Advance Commercial Information Truck e-Manifest, an electronic filing system similar to the United States' ACE e-Manifest for trucks. Canada will start testing the system in



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October 2010, then make it mandatory for importers starting in November 2011, says Gavin, whose company markets e-Manifest software to carriers.

Given all those security requirements, shippers and their service providers must coordinate their processes much more closely than they used to. Gone are the days when shippers might not even let drivers see the goods they were hauling.

"It's now a dance that needs to be choreographed among parties that may not have communicated well in the past," Gavin says.

EXPECT DELAYS AHEAD

Security measures may also force shippers to cope with long waits. Backups at the border are significantly shorter than they were in the early days of ACE, says Amy Magnus, district manager for Champlain, N.Y., Detroit and Port Huron, Mich., at A.N. Deringer, a third-party logistics provider (3PL) and customs broker based in St. Albans, Vt. But any small discrepancy between a filing and the physical reality—say, a truck that turns up at the Highgate Springs, Vt., border crossing rather than 20 miles away at Champlain, N.Y.—can stall a shipment.

"We don't always know the delay's impact on an importer," Magnus says. "But if the load is fresh baby lettuce coming from Canada, any delay is serious."

One strategy for minimizing security-related delays is to enroll in the U.S. government's Customs-Trade Partnership Against Terrorism (C-TPAT) program. C-TPAT shippers adhere to a strict set of supply chain security standards. In exchange, they are supposed to undergo fewer screenings than non-certified shippers.

But C-TPAT isn't a panacea. Maintaining the certification is cost- and labor-intensive, Lemieux says. And membership doesn't guarantee that

loads will speed across the border. If a truck carries a commodity that CBP considers a problem, agents will unload the trailer to inspect the cargo. This has happened to Cascades many times.

"We have to pay for the unloading," says Lemieux. "It's expensive, and it makes our clients unhappy because we're not keeping to our schedule."

NOT SO FAST

To offset the cost of complying with border regulations and participating in voluntary programs such as C-TPAT, many carriers today impose surcharges on loads that cross the border, says John Coombs, Canadian logistics manager for Odyssey Logistics and Technology and vice president of Odyssey Canada. "The added cost for a truckload shipment can range from \$35 to \$75," he says. The extra cost for an LTL shipment might be \$10 to \$20.

Even when a shipper and carrier have all their filings in order, a truck can easily lose time sitting in a long line

waiting to clear Customs, especially at high-volume crossings such as the Ambassador Bridge between Detroit and Windsor, Ontario.

Qualifying for the Free and Secure Trade (FAST) program, which lets properly credentialed trucks move through an express lane, doesn't always help. "Even if there is a FAST lane, it could take a truck up to one hour just to get into it," says Coombs.

Windsor and Detroit need better highway approaches to the border crossing, and ports of entry in general need more Customs officers, says McKenty. "Somehow, the authorities have to get trucks through faster, and they've got to make it more convenient to get to Customs," he says.

Improvements may be on the way. In April 2010, the Canadian government offered to lend the government of

Michigan \$550 million to cover the state's share of a proposed project to build a second span between Windsor and Detroit.

"Border crossings are a big deal for Canada because it is so dependent on the U.S. market for exports," says John Taylor, associate professor of supply chain management and director of supply chain programs at Wayne State University in Detroit. That's why Canada was willing to front the money to Michigan.

"The Canadian government wants to make sure it can integrate trade and services across the U.S.-Canada border," he adds. "It sees a new bridge as an important factor there."

The partnership that plans to build the Detroit River International Crossing includes the governments of Canada and Ontario, the U.S. Federal Highway Administration, and the Michigan Department of Transportation (MDOT).

But despite Canada's offer, the bridge



Trucks may lose time waiting in long lines to clear Customs, especially at high-volume crossings such as the Ambassador Bridge between Detroit and Windsor, Ontario.

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project is not a done deal. Manuel Maroun, the billionaire owner of the Ambassador Bridge, hopes to build a second span of his own, and he is fighting hard against potential competition. The day after Canada made its offer, Maroun's lawyers announced that they would sue to block the loan.

Along with a new bridge over the Detroit River, shippers and their service providers also would like to see better approaches to some of the busier ports of entry. One improvement recently completed on the U.S. side is Michigan's Ambassador Bridge Gateway Project.

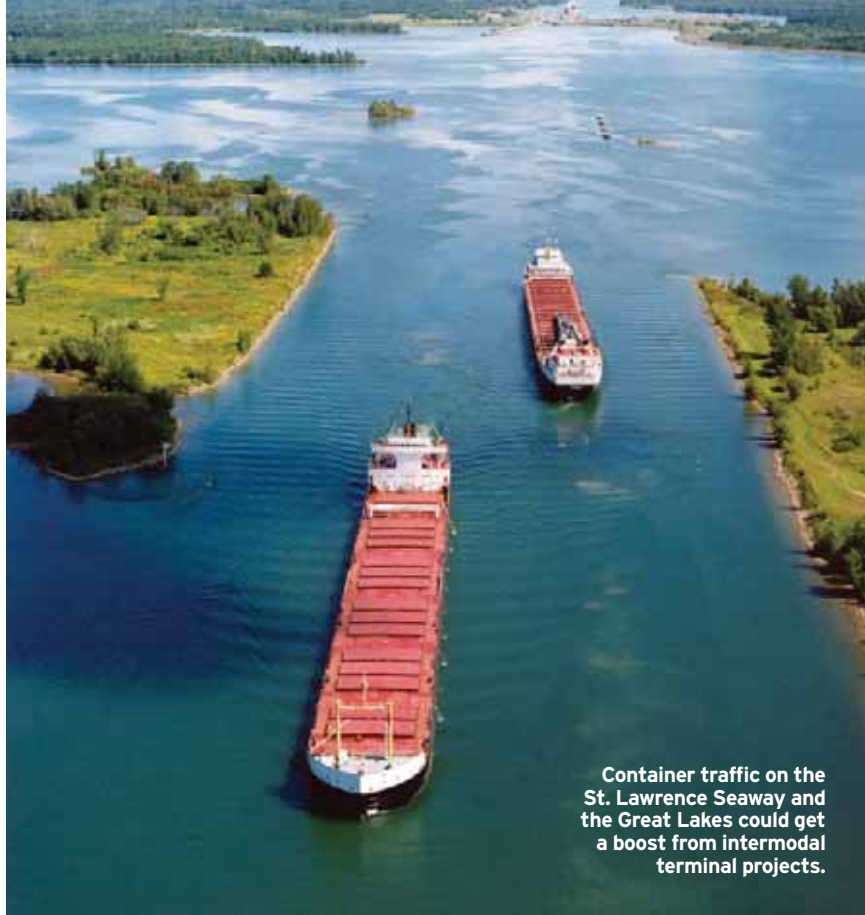
Thanks to this new highway connector, vehicles approaching or leaving the Ambassador Bridge no longer must negotiate Detroit's surface streets. In the past, the state was prohibited from directly linking the privately owned bridge to the interstate system. But that federal law was changed a few years ago, says Larry Karnes, an MDOT freight policy specialist. The new project links the bridge directly to Interstate 75.

A little farther north, much-needed improvements are also in store for the approaches to the Blue Water Bridge, linking Fort Huron, Mich., and Sarnia, Ontario. "Officials had no idea the traffic crossing these bridges would ever approach today's volume," Coombs says. "Now they recognize it is an issue, and they're starting to work on improving it."

In Fort Huron, MDOT has proposed \$500 million worth of entry port plaza improvements, assuming it can come up with the money, Taylor says. The project includes a new facility to handle trucks that are chosen for secondary inspection, with parking for 100 trucks. The current inspection station has room for only 30.

DOLLAR FOR DOLLAR

Along with tighter security and improved access, another factor that is changing the game for cross-border truck transportation is the strength of Canada's currency. Back when the Canadian dollar was worth roughly 65 cents (US), companies south of the



Container traffic on the St. Lawrence Seaway and the Great Lakes could get a boost from intermodal terminal projects.

border were eager to source goods in Canada. That spurred a steady stream of loaded southbound trailers.

"That traffic flow has completely changed, because the Canadian dollar basically is worth \$1 (US) today," says Coombs. More Canadian companies are sourcing from the United States, and they're competing for equipment to bring their product north.

"What used to be a headhaul from Canada to the United States is now a backhaul, and what used to be a backhaul is a headhaul," he adds.

For Grace Canada, this reversal has forced new cost calculations for shipping raw materials from U.S. suppliers to Canadian factories, and for shipping finished products to U.S. customers. "We used to get low rates for products moving from the United States into Canada," McKenty says. "Now those transportation rates are going up, and we get lower rates the opposite way around."

Today, a run from Toronto to Chicago can cost as little as \$800. "But coming back, the rate could be as high as \$1,300 or \$1,400," Coombs says. To get better prices on the northbound trip, Odyssey tries to create continuous moves.

Although most freight moving between Canada and the United States travels by truck, rail also is an important cross-border mode. International shippers could gain new transportation options as the Detroit-Windsor border adds rail and intermodal capacity in coming years.

RAIL IMPROVEMENTS

In June 2010, the Windsor Port Authority, the Canadian Pacific Railway, and the Borealis Infrastructure Trust established the Continental Rail Gateway consortium. The new effort, which follows the previous Detroit River Tunnel Partnership (DRTP), is exploring a high-clearance replacement rail tunnel between Detroit and Windsor.

The DRTP enlarged one of the tubes several years ago, providing enough vertical clearance to accommodate double-stacked international containers. But the railroad can't stack those containers with larger domestic boxes, or double-stack the domestic boxes.

"They also can't accommodate some of the other higher-cube cars, such as modern auto racks," Karnes says.

Another rail-focused project in the region is the proposed \$650-million

Detroit Intermodal Freight Terminal. Designed to replace individual terminals operated by CP, CSX, Canadian National (CN), and Norfolk Southern, the new facility would be built on the Detroit-Dearborn border on a 300-acre site formerly operated by Philadelphia-based freight service operator Consolidated Rail Corporation.

Traffic running through the new terminal would include international containers carried by CN from Halifax and from U.S. and Canadian West Coast ports, and by CP from Montreal and Vancouver.

MORE SEAWAY CONTAINERS

Two other intermodal terminal projects could create more international traffic on the St. Lawrence Seaway. One initiative is the Erie Inland Port, a planned collection of facilities in and near Erie, Pa., to support rail-truck transfers, distribution centers, and water transportation.

In anticipation of this new infrastructure, Great Lakes Feeder Lines, based in Burlington, Ontario, has purchased a new ship, *Arctic Sea*. Along with breakbulk cargo, this vessel can accommodate containers, says Terry Johnson, administrator of the St. Lawrence Seaway Development Corporation (SLSDC), part of the U.S. Department of Transportation. The SLSDC manages the Seaway

in cooperation with the Canadian St. Lawrence Seaway Management Corporation.

"As soon as we make all the arrange-

The service is expected to carry roughly equal volumes of inbound and outbound containers—both cargo originating in Europe and bound there.

Although Erie already handles international passengers and breakbulk cargo, the *Arctic Sea* service will mark the first time it functions as an international container port, Johnson explains.

At the other end of the Seaway system, a collection of partners are laying plans to build the Melford International Terminal on the Strait of Canso in Nova Scotia. The development of this facility is designed to handle container ships too large to dock at U.S. East Coast ports.

The Erie and Melford projects could eventually boost container traffic on the Seaway and the Great Lakes. "The majority of freight will move by rail and truck," Johnson says. "But the Seaway is there, and the Strait of Canso features a Seaway-sized lock, so it will be interesting to see whether it can be cost efficient to move those boxes via marine transportation."

If many containers start plying the waters between Melford and Montreal at one end, and calling on ports such as Erie and North Baltimore, Ohio, on

the other, it will add yet another set of stitches to the many that already closely bind Canada and the United States at the border. ■

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One key step to finding answers to any logistics problem is knowing the right questions to ask.

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

More importantly, these logistics IT thought leaders can give you guidance when considering applying technology innovations to your business processes.

IT. THOUGHT LEADERS

ROBERT BYRNE

President & CEO,
Terra Technology

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ROBERT
BYRNE

President and CEO
Terra Technology

not be based on historical averages. All currently available demand signals, including POS, should be used to ensure the most accurate shipment forecast. The solution must also be flexible enough to evolve as manufacturer and distribution capabilities change.

Q: What are the benefits of transportation forecasting?

BYRNE: Transportation forecasting solutions ensure that logistics, manufacturing, and supply chain are executing to the same plan. Transportation and warehouse planners have visibility into promotions so they can plan for spikes in demand, reducing

Q: Why isn't transportation planned with the same level of rigor as finished goods?

BYRNE: Transportation cannot be planned with the same level of rigor as finished goods because transportation management systems rely on one piece of information—current orders—to schedule shipments. There is no forward-looking view of requirements that would let the planners understand promotion timing, capacity issues, or seasonal patterns. If transportation planners want to shift from reacting to orders to proactively managing capacity, they need a lane-level transportation forecast. Moreover, this forecast needs to be synchronized with the manufacturing and distribution plan so the whole company is responding to the same demand signals.

Q: What are the requirements for a transportation forecasting solution?

BYRNE: A successful transportation forecasting solution must generate a forecast that is not only tied to the corporate demand plan, but also provides the granularity required by transportation—for example, mode, protection class, carrier, etc. The solution must have visibility into promotions so that planners can adjust shipments in advance of promotion-induced spikes in demand. It should also reflect current manufacturing and distribution capabilities and strategies, and should

their reliance on the spot market and enabling more accurate staffing.

Although premiums are not high now, transportation is a cyclical business and rates will rise as capacity has dropped and business is improving. Manufacturers can increase intermodal shipments and decrease deadhead miles with the ability to plan for increased demand weeks in advance of actual orders. Switching to intermodal shipments reduces carbon emissions and fuel consumption, decreasing costs and improving sustainability efforts. Visibility into future transportation requirements enables manufacturers to identify capacity issues in advance, giving logistics the time to resolve them. Visibility into future shipments and receipts improves warehouse staffing. Separating truck procurement from order creation both lowers costs and improves responsiveness. Forecasts that match current manufacturing and distribution capabilities and strategies generate more effective strategic sourcing and give manufacturers the opportunity to collaborate with carriers and retailers, benefitting manufacturers, retailers, carriers, and consumers.

Transportation forecasts can be integrated with Transportation and Warehouse Management Systems to further improve efficiency. Manufacturers can cut costs, improve service, and increase sustainability by forecasting transportation requirements rather than just reacting to orders.

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CEO
TradeCard

KURT CAVANO



Q: Why is SaaS the next big thing in supply chain?

CAVANO: Business leaders and the supply chain community are just beginning to recognize the potential of SaaS and Cloud technology. As this continues, the innovation and impact will rapidly snowball.

A recent note by AMR analyst and supply chain guru Kevin O'Marah provided an interesting summation of the supply chain's impact on productivity gains and the potential impact of SaaS. For most of the 20th century, productivity grew at 1.5 percent per year based on mechanical innovation, O'Marah explains. From 1995 to the present, productivity is closer to three percent, based on supply chain efficiencies.

The point is that supply chain organizations, which are improving their own metrics 10 percent per year by combining mechanical operations and engineering with new technology and Internet-based tools, are allowing organizations to double their overall annual rate of productivity. The issue many of us have come up against is that supply chain and ERP projects, and other technologies designed to improve performance and efficiency, are expensive. They're costly to deploy, costly to maintain, and, unfortunately, costly to replace.

This is where software-as-a-service becomes key. As O'Marah put it: software-as-a-service architecture allows nearly constant revision without the pain of on-premises upgrades. This is a major breakthrough.

Q: What challenges or issues are you hearing from business leaders today regarding supply chains?

CAVANO: Most IT, finance, or operations folks have apprehension about the supply chain. It's complex. It's outside the four walls of the organization. There's too much risk associated with it. SaaS in the supply chain changes all this.

Supply chain strategies built around SaaS or Cloud computing eliminate many headaches that often come with supply chain investments. The need for presence overseas is reduced or

eliminated. Time spent integrating systems across internal departments is cut. Time spent integrating with hundreds of suppliers and partners is greatly reduced.

Q: What types of initiatives are being tackled with SaaS or Cloud computing?

CAVANO: There's a lot already underway. The people who "get it" see that, with the right approach, SaaS becomes your ERP for the supply chain—but without the major headaches and costs. The companies TradeCard is working with today are using SaaS to address things like:

- Their sourcing organization's need to provide automated connectivity to suppliers.
- Their logistics team's need for shipment visibility.
- New Homeland Security, social, and SOX compliance regulations.
- Direct ship/DC bypass/crossdocking capabilities.
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CHRIS
TIMMER

Senior Vice President of
Business Development and
Marketing, LeanLogistics

capacity. As the century turned, technology began to play a role in streamlining these processes. Software companies began to see the industry paying for this type of technology and developed high-end, logic-based tools to manage the process.

Today, we see another shift in the mentality of the transportation buyer. In a recent LeanLogistics survey, 52 percent of all shippers are now bidding freight on a local, regional, and lane basis, with 70 percent putting freight out to bid multiple times a year. This is a dramatic change from the network annual bid mentality that was prevalent since the late 1990s.

Q: How has innovation affected the purchasing of transportation services over the years?

TIMMER: After 20 years in the transportation industry, it is interesting to witness the changes that have occurred in the mentality deployed for transportation sourcing. I can remember the days working for a mid-sized truckload carrier developing pricing for the sales team. Tariffs and discounts, rate sheets and napkins—it was a lot different then. It took months to participate and obtain results from the customer. In most cases, the way to get business was to ask for a few lanes to prove your capabilities, then hope to grow with more volume.

Having participated in those processes, it is interesting to see the evolution of behaviors of the market. As the late 1990s approached, we saw more of a trend to participate in annual network bids. These were also very complex, manual, and time-consuming. The mentality of the buyer was to put more on the table for the carrier to see the bigger picture when pricing and committing

But what does this tell us about our market? I believe we are witnessing an evolution that reflects cultural influences.

Today's buyer has stepped into transportation in an age where technology and access to transportation networks is commonplace. The user is accustomed to having technology handle administrative and logic-based decisions.

Additionally, the access to potential suppliers is less about a golf outing and more about a cost-plus-service equation. Don't get me wrong, relationship is the backbone for all business transactions, but relationship doesn't keep people's jobs and increase their bonuses. Savings do. With access and visibility to posting boards, SaaS transportation networks, and optimization technologies, transportation procurement has evolved to a point where it is truly a continuous management function.

Times sure have changed. I believe that these changes will help sustain a vibrant critical industry.

LeanLogistics | 616-738-6400
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Q: What are some of the challenges companies face when trying to achieve supply chain visibility?

CHOWDARY: Globalization has fundamentally changed the requirements for supply chain visibility. Key challenges in achieving supply chain visibility include: Manual data inputs, multiple sources of data, data latency, and point-to-point interfaces.

Existing solutions provide fragmented visibility, resulting in 'versions of truth' and higher costs.

CEO
Aankhen Inc.

SUBHASH CHOWDARY

Q: What new technologies are available to address these end-to-end supply chain visibility challenges?

CHOWDARY: Tracking devices using RFID/GPS technologies attached to assets have been used in defense and commercial logistics. These tracking devices address some visibility challenges through accurate, automated, and real-time data capture. In addition, automated global data capture managed by on-demand software reduces the need for point-to-point interfaces.

Sensors integrated into the tracking devices provide security and environmental monitoring, with geo-location intelligence enabling real-time supply chain management to see and respond to risk.

Q: What difficulties are posed by using these new tracking technologies?

CHOWDARY: Some hardware technologies present challenges. For instance, RFID tags/devices require hardware readers to read the data from the tags/devices. In a global supply chain, a network of readers will need to be installed globally. This is not practical. GPS devices with communications built in are addressing this issue. As a tag/device traverses the global supply chain, it needs to be able to communicate its data. Satellite communications are expensive. Cellular network coverage requires access to global network providers. Out-of-network costs can be expensive. No coverage in the route can create blind spots. The technologies must become more cost effective.

Applications developed are hardware vendor- and device-centric, and not supply chain focused.

Q: How does Aankhen address these challenges and provide thought leadership?

CHOWDARY: Aankhen's solutions deliver supply chain visibility and intelligence as a service with process, security, and environmental monitoring. Aankhen's device and 'deviceless' tracking innovation is another first in the industry incorporating optical character recognition (OCR) technology to track containers, trucks, and railcars without having to attach a hardware device to the asset.

Aankhen creates new supply chain functionality with new sources of data and analytics not possible before to improve quality of product delivery at lower cost to customers.

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JAMES

STEVENSON

Vice President
Appian Logistics Software, Inc.

Q: How can 3PLs use advanced planning tools to model complex routing operations and streamline the bid process?

STEVENSON: Traditionally, companies used a team of analysts to model scenarios and calculate resource requirements. Any revisions required extensive man hours and double and triple checking updated plans for accuracy. The results were less than ideal because it was simply not possible to manually calculate all the combinations needed to arrive at an optimized plan. Factors such as rolling DOT rules, slip-seating, delivery windows, capacities, and truck schedules had to be included for the resource modeling to be effective.

In a tight economy, do companies have spare resources and time available to crunch through hundreds of combinations and arrive at an ideal solution? Probably not. They do the minimum required just to get the bids out in time. With the tools available, however, optimized bids and visual presentations can be compiled in a fraction of the time without the angst of cross-checking hundreds of manual calculations. Logistics companies that use these tools have a significant advantage in both demonstrating results and helping clients cut costs.

Q: Once they win the business, how do these companies put their design into action and drive continuous improvements on a daily basis?

STEVENSON: First, the company has to efficiently execute the proposed solution on a daily basis. World-class logistics companies take it a step

further and continually look for places to streamline operations and drive more cost savings. The combination of automated fleet routing, real-time GPS tracking, and resource optimization helps these companies execute better routes, resolve issues in real time, and continually uncover opportunities for cost reductions.

Am I getting the most out of my fleet operation? Are there cost savings opportunities we are unable to see using the processes and tools available today? These are the kinds of questions that a 3PL has to be asking continuously to ensure they are

providing the best service possible to the customer. When you are able to quickly compare existing operations to what is possible, and to monitor planned versus actual performance levels, it is a different ball game.

Q: What keeps 3PLs from benefiting fully from planning tools?

STEVENSON: The main hindrances are not knowing the types of modeling and daily execution tools available and not evaluating different scenarios because it was so difficult in the past. Many times, companies have considered changes but the impact was left to conjecture because it was too time-consuming to evaluate options. Changes in daily fleet routing were difficult to implement because fixed route structures and tools did not lend themselves to dispatching new routes for part of the fleet and evaluating results.

It is important for companies to understand what is possible and to adopt a new mindset for evaluating change since automated tools streamline the process and eliminate the guesswork. Appian holds general user conferences and a specific conference for analysts and 3PL users each year to help clients understand these possibilities and to demonstrate the tools available using real-world scenarios. When modeling time is cut to a fraction of what it was, and new tools are utilized, these companies can uncover opportunities and quickly implement changes that provide benefits for their clients.

Appian Logistics Software, Inc. | 800-893-1250
sales@appianlogistics.com | www.appianlogistics.com

Q: Today, globally sourced, private label product is being developed and sold by businesses of all sizes. What are the key elements of success for businesses to navigate the complexities of the global supply chain?

ASKIN: The current, challenging economic climate has underscored the value of globally sourced private label product for retailers, brand owners, and wholesalers. Globally sourced, private label products allow merchants to maximize margins, while maintaining price points, ensuring a good return on investment.

Sourcing product globally is complex. Protecting brand, assuring quality, providing social and customs compliance, while managing trading partner relationships, are but a few areas where, if improperly managed, can spell disaster for the merchant. There are many critical elements that make for a successful, globally sourced, private



DONNY

CEO
Arigo

ASKIN

label program; three stand out above all:

First is Visibility. Complex private label global supply chains, encompassing everything from pre-production through delivery, require aggregating data from many different sources. PLM solutions, ERP solutions, logistics providers, warehouse management systems, and others, each provide siloed data reflective of each solution's focus. Aggregating this data with data integration tools into a single system of record provides a single version of the truth, 360 degree visibility of the global supply chain, and a data repository for analysis. Visibility of the complete global supply chain process is Critical Element #1 for businesses to navigate the complexities of the global supply chain.

Second is Intelligence. Successfully aggregating data from disparate data sources provides the foundation for private label, global sourcing analysis and analytics. Analysis includes tracking business process, calendaring, dash-boarding, alerts, what-if scenarios, and the ability to drive decision support from a homogenous, all-encompassing database. Leveraging advanced business intelligence tools provides the foundation for making educated business decisions and is Critical Element #2 for businesses to navigate the complexities of the global supply chain.

Third is Collaboration. With the advent of Social Networking and Web 2.0 over the past several years, communication has moved to an entirely new level. Enterprise 2.0 is the use of these new collaboration technologies to improve business process and communication. Imagine the ability to text, email, video or audio conference, cam, or create unique content communities... utilizing the form and type of collaboration best suited to communicate with your trading partner. Imagine the ability to communicate in real-time, near-real-time, synchronously, asynchronously, or virtually any means short of physically shaking the hand of your global trading partner. Imagine all of that and being able to attach and archive those collaboration sessions to any transaction, purchase order, RFQ, or trading partner interaction for later retrieval. Enterprise 2.0 + Global Supply Chain Management = Enterprise Collaboration, Critical Element #3 for businesses to navigate the complexities of the global supply chain.

Visibility, Intelligence, and Collaboration ensure a successful return on investment for retailers, brand owners, and wholesalers, who globally source private label products.

Arigo | 978-528-2200
daskin@arigo.com | www.arigo.com

Q: Given the volatility and uncertainty in today's logistics environment, how are logistics providers remaining profitable?

ELLIOTT: Sometimes it's easier than you think to find hidden profits in your warehouse or transportation operation. Many of the most successful companies are doing more with less by simply optimizing their slotting practices, pick paths, truckloads, and delivery routes.

We have customers using automated warehouse slotting and pick path optimization tools to organize products more effectively based on velocity patterns and streamline pick paths for least travel distance. With simple improvements like these in place, picker travel can be reduced by more than 20 percent and labor effectiveness can be improved by five to seven percent. For a 15-worker warehouse, this represents \$45,000 to \$65,000 in annual labor improvement. Additionally, the cost and time savings mean significantly improved service levels.

For-hire carriers and private fleets can save considerably by focusing on load and route optimization. Recently, a single distribution center for the Piggly Wiggly grocery chain cut

approximately 3,000 miles per week just by creating more intelligent load plans and reordering delivery stops, garnering a 10- to 15-percent reduction in overall transportation costs. ROI was achieved in only two to three months.

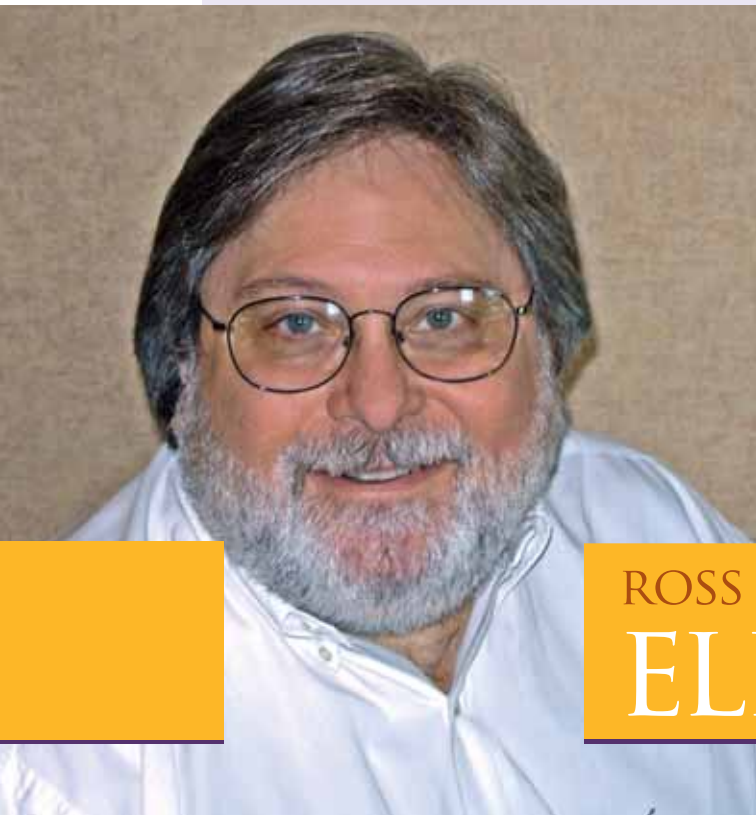
Q: How can logistics providers measure the optimizations they've performed and determine whether they are creating a true benefit for their business?

ELLIOTT: Every operation is unique and conditions change constantly, so optimizations that worked for you in the past might lose their efficacy as time goes on. You need the means to evaluate the effects of your optimization by staying abreast of critical metrics and continually revising your plan.

Due to the historic high cost of deploying business intelligence solutions, many companies have chosen to stay with hard-copy reports that are often printed, set aside, and left unused. With the latest dashboard technology, companies can get immediate insight into essential key performance indicators, at a much lower cost than in previous years. Especially in today's economy, it's crucial to have access to real-time analytics displaying the current state of your business, historically relevant information highlighting important trends, and time-sensitive reports and alerts pointing out key criteria to aid in your decision-making process.

In our recent case study of Hall's Warehouse, a user of our logistics-tailored business intelligence tool, we found that they have accelerated putaway by 10 percent, improved personnel productivity by 15 percent, reduced replenishments by 13 percent, and can monitor USDA and FDA hold orders. This also enables them to give immediate feedback to their customers and has allowed them to institute improvements that likely wouldn't have been possible without the ability to monitor real-time activities in the warehouse.

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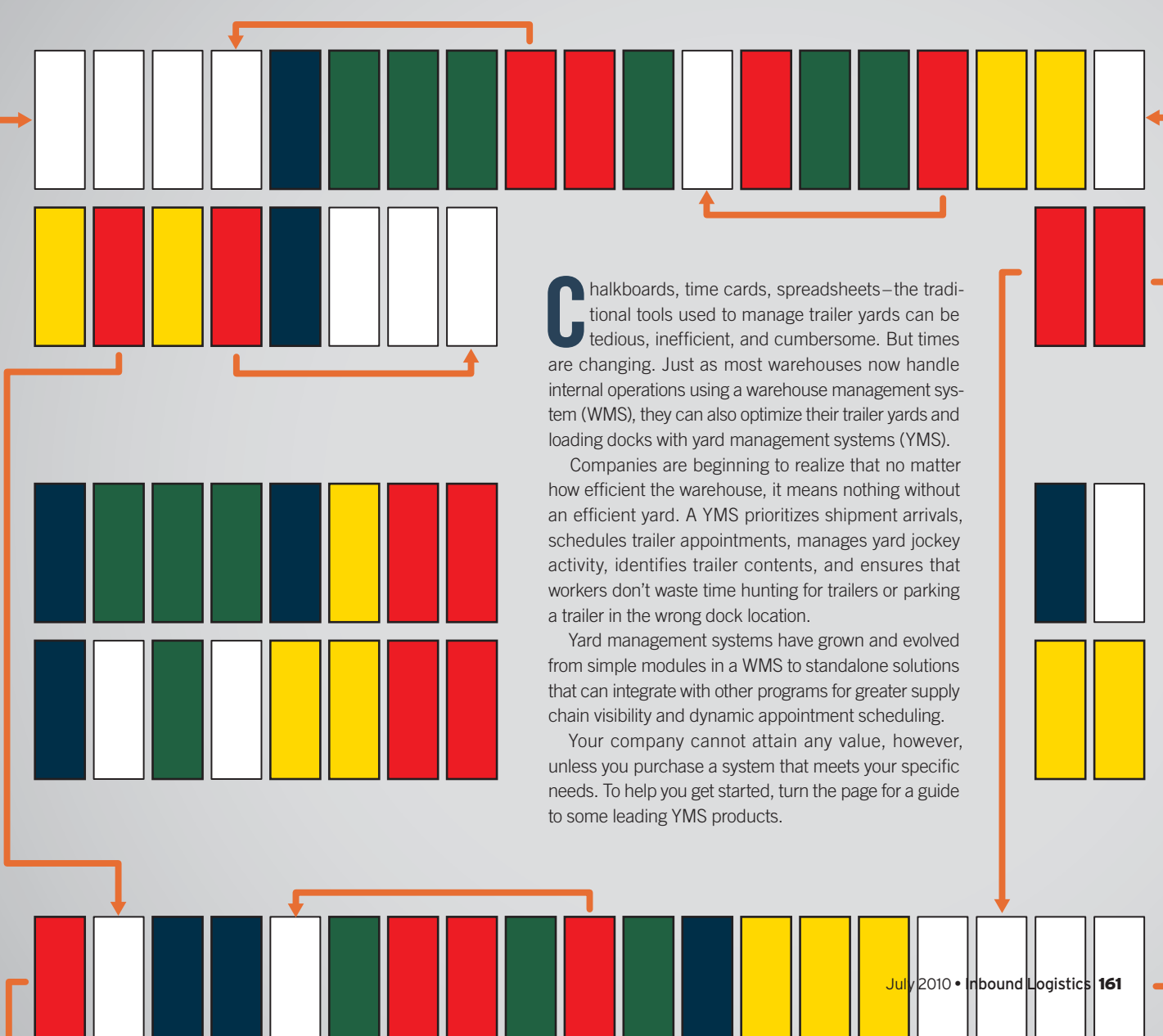
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Yard Management Systems

BUYER'S GUIDE



Chalkboards, time cards, spreadsheets—the traditional tools used to manage trailer yards can be tedious, inefficient, and cumbersome. But times are changing. Just as most warehouses now handle internal operations using a warehouse management system (WMS), they can also optimize their trailer yards and loading docks with yard management systems (YMS).

Companies are beginning to realize that no matter how efficient the warehouse, it means nothing without an efficient yard. A YMS prioritizes shipment arrivals, schedules trailer appointments, manages yard jockey activity, identifies trailer contents, and ensures that workers don't waste time hunting for trailers or parking a trailer in the wrong dock location.

Yard management systems have grown and evolved from simple modules in a WMS to standalone solutions that can integrate with other programs for greater supply chain visibility and dynamic appointment scheduling.

Your company cannot attain any value, however, unless you purchase a system that meets your specific needs. To help you get started, turn the page for a guide to some leading YMS products.

	COMPANY	PRODUCT	DESCRIPTION
H L	ASC Dayton, Ohio www.ascsoftware.com	ASCTrac Yard Management	Tracks WMS inventory and vessels/trailers in the yard; manages min/max trailers and types; and issues automatic event triggers for contacting carriers to request more trailers or pickups.
H L	C3 Solutions Inc. Montreal, Quebec www.c3solutions.com	C3 Yard Smart	Manages trailer inventories and their contents down to the SKU level, gate arrivals and departures, and dock management. Provides real-time task management using wireless technology combined with graphic interfaces.
H	Cypress Inland Highlands Ranch, Colo. www.yardview.com	YardView	Schedules inbound and outbound appointments, makes changes, and generates trailer activity reports. Retrieves status changes and moves for any trailer, displaying step-by-step activity from when a trailer enters inventory until it leaves.
H	Exotrac New York, N.Y. www.exotrac.com	YardTrac	Offers real-time asset visibility, monitoring, and security for consolidation centers, distribution centers, warehouses, and pool points. Interfaces with GPS-equipped mobile phones with attached bar-code scanners to rapidly scan trailers and containers to perform field-based functions.
H L	Fluensee Englewood, Colo. www.fluensee.com	Fluensee Yard	Automates trailer visibility and location at the gatehouse, in the yard, and at the dock doors, while managing switcher tasks, location, and accountability using RFID and GPS.
H L	HighJump Eden Prairie, Minn. www.highjump.com	HighJump Yard Advantage	Tracks the location of trailers and other equipment with RFID-based, real-time location tracking. Ensures security and streamlines workflows by providing the actual position of equipment in the yard.
H L	Infor Alpharetta, Ga. www.infor.com	Infor SCM Yard Management	Streamlines dock and yard operations to offer greater trailer inventory visibility, increased security, and lower overall trailer costs.
H L	InSync Software Inc. San Jose, Calif. www.insyncinfo.com	iApp Yard Management	Improves asset visibility and automation, reduces shrinkage and waste, increases service levels with lower inventory carrying costs, and cuts asset location time.
L	Knighted Computer Systems Ossining, N.Y. www.knightedcs.com	Yard Management	Monitors trailer status and provides data such as carrier and appointment, load type and contents, associated vendor and customer, pending trailer movements, and dock door assignments.
L	Manhattan Associates Atlanta, Ga. www.manh.com	Yard Management	Interfaces with appointment scheduling software, provides visibility into inbound and outbound transportation, identifies exact location of assets, identifies critical loads, and synchronizes yard and dock door operations.

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	COMPANY	PRODUCT	DESCRIPTION
H L	MaxAccel Boulder, Colo. www.yardpro.maxaccel.com	YardPRO	Represents railcar conditions through color-coded icons. Captures historical move, switch, dwell, and demurrage data for accounting and billing.
H L	ORTEC Atlanta, Ga. www.ortec.com	ORTEC Yard Management	Plans, monitors, and controls truck movements, and supports loading and unloading activities in the yard. SAP shipment or delivery documents can be linked to trucks to enable status triggering.
H L	PINC Solutions Berkeley, Calif. www.pincsolutions.com	Yard Hound	Offers access to real-time yard and shipment information and provides activity management online 24/7. Locates trailers and trucks, displays load status, manages and sets alerts, schedules appointments, and generates analytics/performance reports.
H	RACO Industries Cincinnati, Ohio www.racoindustries.com	Yard Director YMS	Provides trucking yard control, compliance, asset visibility, and efficiency through real-time tracking and reporting on vehicle locations and contents. Issues fuel level, temperature, detention, and maintenance alerts.
H L	RedPrairie Waukesha, Wis. www.redprairie.com	Yard Management	Controls real-time trailer spotting and retrieving using RF terminals or paper. Allows numerous views of the yard. Redirects or initiates trailer movement and allows gate operators to check trailers in and out while capturing relevant data.
L	Retalix Ltd. Plano, Texas www.retalix.com	Retalix Yard Management	Integrates yard data and ensures real-time, optimal automation, and provides arrival and departure control. Tracks trailer movement, location, and readiness across the yard.
L	Royal4 Systems Long Beach, Calif. www.royal4.com	Yard Management	Manages appointment tracking, trailer check-in and check-out, trailer movements, yard inventory reports, and email alerts. Helps coordinate crossdocking and interleaving operations.
H	Virtual Yard Management Inc. Sheffield Village, Ohio www.vyminc.com	KT³	Tracks the life cycle of a container as it enters the property. Captures and reports real-time location, load status, movement, and dock activity.
H L	Zebra Enterprise Solutions Lincolnshire, Ill. http://zes.zebra.com	Yard Management Solutions	Automates workflows and processes while capturing data on tracked assets at multiple sites. Identifies shipping bottlenecks and adjusts delivery schedules. Provides access to historical asset status and location data.

Not sure if a YMS is right for you? Ask these questions before deciding:

Is the system adaptable to multiple yard locations? ■ Is the current inventory management situation severe enough to justify the YMS investment? ■ How much will the system help increase throughput? ■ Is the system easy to configure and use? ■ Will the YMS grow with the company?



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SUMMER READING GUIDE 2010

A dark silhouette of a person lying in a hammock, holding an open book. The hammock is strung between two points, and the person is positioned in the center, facing the viewer. The background is a light blue gradient with a faint circular pattern.

Grab one of these knowledge-boosting supply chain and logistics volumes as you head for the hammock. Then when colleagues ask how you spent your summer vacation, you can share your new insights.

July 2010 • Inbound Logistics 167

SUMMER READING GUIDE 2010



SUPPLY CHAIN PLANNING FOR THE PROCESS INDUSTRY

By Harpal Singh, PhD

Process manufacturing, in which formulas and recipes are turned into product, represents a different set of supply chain concerns than discrete manufacturing's bills of materials and routing. This book outlines the key characteristics of process manufacturing, and the tools required to support demand and supply planning, material flow conservation, and scheduling. Examples provide an in-depth look at the chemical, food, and semiconductor industries.

KEY TAKEAWAYS: Process manufacturing's unique characteristics require specialized supply chain solutions that can cope with managing material delivery and capacity utilization simultaneously.

FOR DETAILS: www.supplychain.com

REMANUFACTURING AS A SUPPLY CHAIN STRATEGY: Business Models and Case Studies

By Pinar Martin

Manufacturers are increasingly urged to reduce waste and establish sustainable manufacturing practices. Companies that manage their closed-loop supply chains by taking advantage of returned products have the potential to make waste reduction profitable. But as closed-loop supply chains evolved swiftly, and the value trapped in products increased dramatically, managers lacked the resources to create successful remanufacturing business models. To guide companies in planning closed-loop supply chains, the author provides a business model developed through extensive data analysis and scientific research. Business model examples from Fortune 100 companies offer real-world perspective.

KEY TAKEAWAYS: Managers will find the relationship between brand capital, intellectual property and assets, and the decision to outsource intriguing. Case studies conducted at companies such as Bosch, Hewlett-Packard, and Xerox provide valuable learning opportunities.

FOR DETAILS: www.vdm-publishing.com

▼ OPERATIONS RULES:

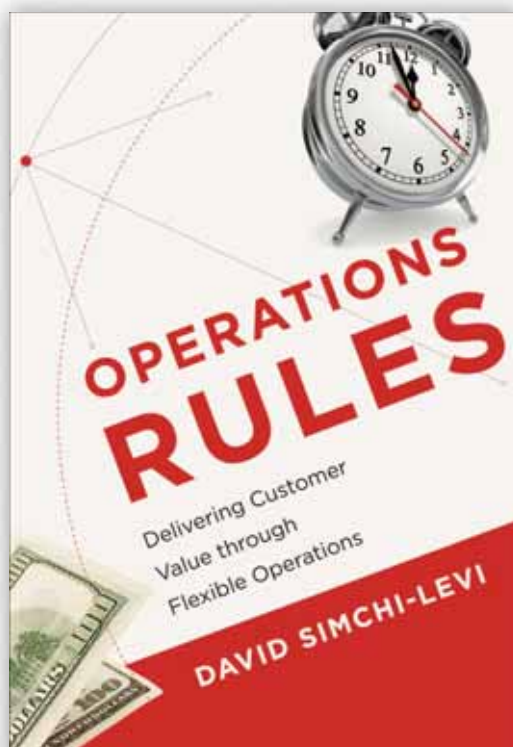
Delivering Customer Value Through Flexible Operations

By David Simchi-Levi

Companies tend to consider the value they provide to customers and operations strategies as two separate processes. Many real-world examples, however, illustrate the need to link the two, and failure to do so can be disastrous, claims Simchi-Levi, a professor of engineering systems at MIT. In *Operations Rules*, he gives business leaders the tools to understand how to improve operations via a new customer-value perspective.

KEY TAKEAWAYS: Managers and executives can address strategy misalignments by making small-scale operations adjustments that can deliver big results. They must weigh their options, however, because operational and supply chain strategies, the market channel, and even the skill sets required to be successful, depend on the value a company intends to deliver.

FOR DETAILS: mitpress.mit.edu





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SUMMER READING GUIDE 2010



GREEN LOGISTICS:

Improving the Environmental Sustainability of Logistics

Edited By Alan McKinnon, Sharon Cullinane, Michael Browne, and Anthony Whiteing

Green Logistics analyzes the environmental consequences of logistics and how to address them. Written by a leading team of logistics academics, the book examines ways of reducing environmental impacts and achieving a more sustainable balance among economic, green, and social objectives. It examines key areas such as supply chain carbon auditing; transferring freight to greener transport modes; developing greener vehicles, aircraft, and ships; reducing warehousing's environmental impact; and the government's role in promoting sustainable logistics.

KEY TAKEAWAYS: As concern for the environment grows, companies must pay more attention to the external costs of logistics associated with climate change, air pollution, noise, vibration, and accidents.

FOR DETAILS: www.koganpageusa.com

THE HANDBOOK OF LOGISTICS AND DISTRIBUTION MANAGEMENT

By Alan Rushton, Phil Croucher, and Peter Baker

Now in its fourth edition, this comprehensive guide covers the full scope of logistics and distribution, providing a broad strategic framework for planning, as well as a clear and straightforward description of the basic functions and elements. This book will help any logistics manager's quest to improve service and reduce cost, and keep them aware of the many different facets of logistics and the supply chain. It should be of interest to practicing managers and supervisors, to candidates taking tests for various professional institutes, and to students who are studying for degrees in logistics, distribution, and supply chain management.

KEY TAKEAWAYS: This definitive handbook clearly explains the concepts of logistics and distribution; planning; procurement and inventory decisions; warehousing and storage; freight transport; and operational management.

FOR DETAILS: www.koganpageusa.com



▲ THE NEW SUPPLY CHAIN AGENDA: The Five Steps That Drive Real Value

By Reuben E. Slone, J. Paul Dittmann, and John T. Mentzer

In most companies, the supply chain controls a majority of the inventory, manages 60 percent to 70 percent of the cost, is the foundation to generate revenue by providing outstanding product availability, and manages most of the firm's physical assets. Then why is supply chain excellence the most underutilized competitive tool? The authors explain how organizations can turn their supply chains into competitive weapons.

KEY TAKEAWAYS: By eliminating disruptions, ramping up efficiencies, and upgrading performance along the supply chain, companies can vastly improve economic profit and boost shareholder value.

FOR DETAILS: www.hbr.org/books

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SUMMER READING GUIDE 2010



SUPPLY CHAIN SECURITY: **Management, Initiatives, and Technologies**

By TT Club Mutual Insurance and the International Cargo Handling and Co-ordination Association

This publication defines security principles in the supply chain and guides supply chain operators on how to enhance value through effective security implementation. It provides an overview of current security initiatives and technologies, but is centered on the premise that the ISO 28000:2007 management standard offers a valuable framework for implementation.

KEY TAKEAWAYS: Security need not be seen as an unnecessary drain on resources, and can actually provide a significant contribution to the bottom line.

FOR DETAILS: www.ttclub.com or www.ichca.org

GLOBAL LOGISTICS: **New Directions in Supply Chain Management**

Edited by Donald Waters

This established reference, completely rewritten for its sixth edition, has evolved to represent the current trends, best practices, and latest thinking in global logistics. Its contributors, a range of acknowledged sector specialists, discuss key logistics issues and share their authoritative views on topics such as logistics in China, and Central and Eastern Europe; communications and technology improvement; humanitarian supply chains; Internet trading; agile supply chains; and performance measurement.

KEY TAKEAWAYS: Communications and information technology are offering new opportunities; world trade is growing; competition is forcing operations to adopt new practices and become more efficient; and there is increasing concern for the environment. Add to this the increased emphasis on customer satisfaction, flexible operations, and time compression, and it becomes clear why it is so important for organizations to do logistics right.

FOR DETAILS: www.koganpageusa.com

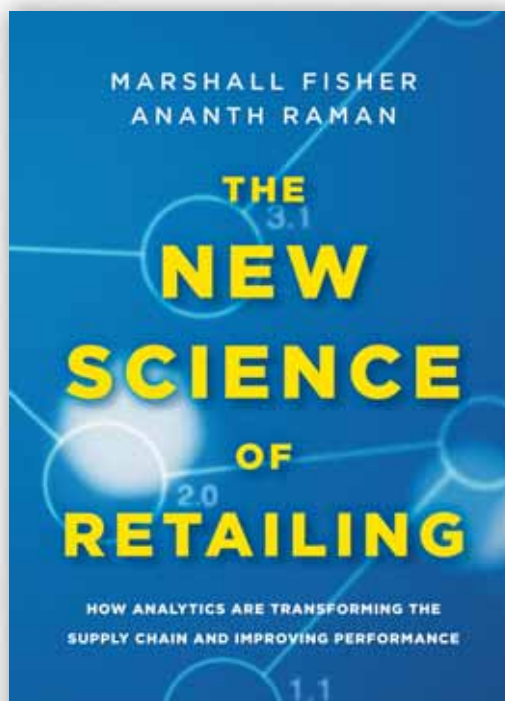
▼ THE NEW SCIENCE OF RETAILING: **How Analytics are Transforming the Supply Chain and Improving Performance**

By Marshall Fisher and Ananth Raman

Harvard Business School professors Marshall Fisher and Ananth Raman explain how retailers can use analytics to better manage inventory for faster turns, fewer discounted offerings, and fatter profit margins. Featuring case studies of leading retail companies from around the world, this practical new book shows retailers how to build end-to-end agility into the supply chain and establish incentives that align supply chain partners behind shared objectives.

KEY TAKEAWAYS: Retailers today are drowning in data but lacking in insight. They have huge volumes of information at their disposal, but they are unsure of how to sort through it and use it to make smart decisions. As a result, they are struggling with profit-sapping supply chain problems including stockouts, overstocks, and discounting. With the right tools, they can turn data into a wellspring of new profits and unprecedented efficiency.

FOR DETAILS: hbsp.harvard.edu



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They grow their ports big in Texas. So it's no small consequence that the Gulf Coast region and the United States at large greatly depend on the state's global gateways to wrangle cargo from all corners of the world.

Texas ports transport an average of 317 million metric tons of cargo annually – or 17 percent of total U.S. port tonnage – and more than half of U.S. foreign imports and exports. From agricultural products to oil, via tankers and containerships, between Corpus Christi, Freeport, Houston, Galveston, and Beaumont, the Texas maritime trade is blazing trails for a new economy.

Join Corpus Christi Mayor Joe Adame and *Inbound Logistics* as we explore how Texas' Gulf Coast ports are steering economic growth throughout the country.



Port of
Houston

July 2010 • Inbound Logistics 175

Gulf Coast Ports Drive Economy



by Joe Adame
Mayor, Corpus Christi, Texas

As experts continue to monitor the economy's recent growth, one fact remains: job creation will be at the heart of any recovery. Around the country, business and community leaders continue to seek new ways to spur large-scale job creation. With the economy more global and interactive than ever—as the financial crisis proved—the value of trade access to and from expanding markets cannot be overstated. Trade means job growth, and several communities around the country are learning firsthand just how valuable global access can be in the new economy.

Another fact exists in at least one part of the nation: for U.S. Gulf Coast ports and the communities that host them, it is an exciting time to be in business. Two developments in the near future have port directors and city leaders from Texas to Florida planning for an influx of new opportunities and anticipating the economic impact these developments will have across the Gulf Coast. Recent reports that the trade deficit is declining suggest that a recovery is gaining strength, and upcoming developments mean that Gulf Coast logistics networks will play a key role in driving economic growth throughout the country.

In 2014, the Panama Canal expansion will nearly double its capacity and allow for shipments from the flourishing Asian market to hit the central and eastern United States with unprecedented speed and maritime access. Less assured is the impact that the potential opening of the Cuban economy will have on the United States, should trade relations normalize.

What is clear is that both opportunities open up new markets for shippers, port officials, and communities

throughout the United States. In anticipation, many communities have already begun to expand their facilities and plan infrastructure to service the growth these developments will bring. To seize the opportunity that these expansions and renewed global growth create, civic leaders have to be in the business of facilitating infrastructure growth to service new opportunities.

GETTING READY

Port officials in Corpus Christi, Texas, have already begun a historic facility expansion with the announcement of a 250,000-TEU terminal to occupy a long-vacant 1,100-acre site called the La Quinta Trade Gateway. Accessibility to new markets, particularly those in Asia created by the Panama Canal expansion, provides the port and the city with an impetus to expand operations and upgrade facilities.

Couple that with the port's access to U.S. markets—only one left turn from the Port of Los Angeles using existing ground routes—and the Port of Corpus Christi serves as a leading economic driver for a region of more than 400,000

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CONTINUED FROM PAGE 176

people. In addition to local funding, the port hopes to take advantage of another once-in-a-lifetime opportunity: the \$787-billion stimulus package and its generous subsidies for infrastructure projects with proven benefit to the national economy.

With the global economy more interactive than ever before, the value of logistics and infrastructure development is vastly important to communities looking to grow their regional economies. To have a community with access—through air, maritime, ground, or rail resources—is perhaps the greatest asset for any public official in driving economic development in the 21st century. Logistics infrastructure not only provides a valuable flow of goods through the import economy, but provides a strong resource for local industries to reach new markets, whether inside the United States or around the world.

As unemployment continues to gnaw at growth, community leaders are taking the necessary steps to grow their job bases locally. The presence of a port, and the international relevance it generates for a community, presents vast job creation opportunity for industry, shippers, and port services in the coming years.

SEIZING THE OPPORTUNITY

Many pundits have noted the economic crisis created an unprecedented opportunity for those willing and able to seize it. The confluence of a series of historical moves, from government spending to long overdue infrastructure improvements, are energizing communities around the nation to maximize their value in the global economy.

The Gulf Coast continues to grow into an important center for international trade with all the world's continents. As the world economy heals, it may just be the Gulf Coast and its ports that signal the all-clear and return the U.S. economy back to the forefront of global growth. It will be up to local and national leadership to provide these economic engines with the fuel they need to grow our economy back to its place at the head of the global class.



PORT OF CORPUS CHRISTI

www.portofcorpuschristi.com

Main Channel Depth: 45 feet

TRADE DATA

Vessel Calls: 5,151

Imports: 43,373,738 short tons

Exports: 11,981,473 short tons

Domestic Trade: 21,430,962 short tons

Foreign Trade: 55,355,211 short tons

Total Trade: 76,786,173 short tons

U.S. Total Tonnage Ranking: #5

CARGO FACILITIES

- Four multi-purpose docks, one Roll-On/Roll-Off ramp -all with rail access.
- 100,000-square-foot reefer facility.
- 280,000-square-foot enclosed warehouse.
- 100 acres of open storage yards, one public elevator, one bulk terminal with two docks, 11 liquid bulk docks.
- Foreign Trade Zone covering more than 10,000 acres.

COMMODITIES

INBOUND

- Crude oil
- Gas oil
- Ore
- Feed stock
- Slop and slurry
- Aggregate

OUTBOUND

- Gasoline
- Diesel
- Wheat
- Feed stock
- Sorghum
- Cumene
- Alumina

TRADE PARTNERS

- Venezuela
- Nigeria
- Mexico
- Saudi Arabia
- Algeria
- Kuwait
- The United Kingdom
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- New Zealand
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PORT OF BEAUMONT

www.portofbeaumont.com

Main Channel Depth: 40 feet

TRADE DATA

Vessel Calls: 198

Imports: 41,167,853 short tons

Exports: 5,627,771 short tons

Domestic Trade:
22,687,915 short tons

Foreign Trade:
46,795,624 short tons

Total Trade: 69,483,539 short tons

U.S. Total Tonnage Ranking: #7

CARGO FACILITIES

- 121,000 square feet of open wharf space.
- Harbor Island Marine Terminal, 100,000-square-foot open wharf.
- Roll-On/Roll-Off Ramp, immediately downstream from Harbor Island Marine Terminal.
- 3.5-million-bushel-capacity grain elevator.
- Rail-to-ship bulk transfer facility; ship loading rate: 10,000 metric tons/day.

COMMODITIES

- Bulk grain
- Potash
- Aggregate
- Metal articles
- Forest product
- Military cargo
- Project cargo

TRADE PARTNERS

- Brazil
- Canada
- Iraq
- Russia
- China



PORT FREEPORT

www.portfreeport.com

Main Channel Depth: 45 feet

TRADE DATA

Vessel Calls: 3,000

Imports: 22,971,011 short tons

Exports: 2,736,193 short tons

Domestic Trade:
4,135,091 short tons

Foreign Trade:
25,707,204 short tons

Total Trade:
29,842,295 short tons

**U.S. Total Tonnage
Ranking:** #26

CARGO FACILITIES

- 186 acres of developed land and 7,723 acres of undeveloped land.
- 14 operating berths (public and private docks), a climate-controlled facility, and a 70-foot-deep berthing area.
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TRADE PARTNERS

- | | | |
|----------------------|----------------|--------------|
| • Dominican Republic | • Cuba | • Mexico |
| • China | • Iraq | • Nigeria |
| • Colombia | • India | • Costa Rica |
| • Guatemala | • Honduras | • Brazil |
| • Venezuela | • Saudi Arabia | |

COMMODITIES

INBOUND

- Aggregate
- Chemicals
- Clothing
- Crude
- Food
- Paper goods
- Resins
- Wind turbines

OUTBOUND

- Autos
- Chemicals
- Clothing
- Food
- Paper goods
- Resins
- Rice





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PORT OF GALVESTON

www.portofgalveston.com

Main Channel Depth: 40 feet

TRADE DATA

Vessel Calls: 944

Imports: 1,825,635 short tons

Exports: 3,755,754 short tons

Domestic Trade:

4,199,979 short tons

Foreign Trade:

5,581,389 short tons

Total Trade:

9,781,368 short tons

U.S. Total Tonnage

Ranking: #53



CARGO FACILITIES

- Terminal Railway – provides rail connections to Burlington Northern Santa Fe and Union Pacific.
- Pier 10 Terminal –1,346-foot, two-berth dock; water depth of 40 feet; 38-acre terminal; on-terminal rail ramp; truck and rail served.
- Pier 37-38 Rail Barge Terminal – rail bridges designed to transfer railcars from rail line to barge and back again; water depth of 22 feet; rail and truck served.
- Foreign Trade Zone – undeveloped land, available warehouse operator services.

Portfolio Sources: (2008) U.S. Army Corp of Engineers Waterborne Commerce Statistics Center; 2008 Guide to the Economic Value of Texas Ports, Center for Transportation Research, The University of Texas at Austin

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COMMODITIES

- Grain
- Fertilizer
- Bulk liquid
- Bananas/fruit
- General cargo

TRADE PARTNERS

- Mexico
- Guatemala
- Panama
- Colombia
- Venezuela
- Brazil
- Dominican Republic
- Spain
- Italy
- Egypt
- Israel
- Turkey
- Bulgaria
- Belgium
- England
- Germany
- Saudi Arabia
- United Arab Emirates
- Kuwait
- Singapore
- China

PORT OF HOUSTON

www.portofhouston.com

Main Channel Depth: 40 feet

TRADE DATA

Vessel Calls: 8,058

TEUs: 1,797,198

Imports: 92,018,956 short tons

Exports: 54,380,670 short tons

Domestic Trade:

65,808,295 short tons

Foreign Trade:

146,399,626 short tons

Total Trade: 212,207,921 short tons

U.S. Total Tonnage Ranking: #2

CARGO FACILITIES

- Bayport Container and Cruise Terminal – when fully developed, the terminal will have a total of seven container berths with the capacity to handle 2.3 million TEUs on a complex that includes 376 acres of container yard and a 123-acre intermodal facility.
- Barbours Cut Container Terminal – 6,000 feet of continuous quay, Roll-On/Roll-Off platform, a LASH dock, 230 acres of paved marshaling area, 255,000 square feet of warehouse space, refrigerated food warehouse.

TRADE PARTNERS

- Mexico
- Saudi Arabia
- Iraq
- Venezuela
- China

COMMODITIES

- Petroleum & petroleum products
- Organic chemicals
- Iron/steel
- Cereal
- Natural stone
- Plastics



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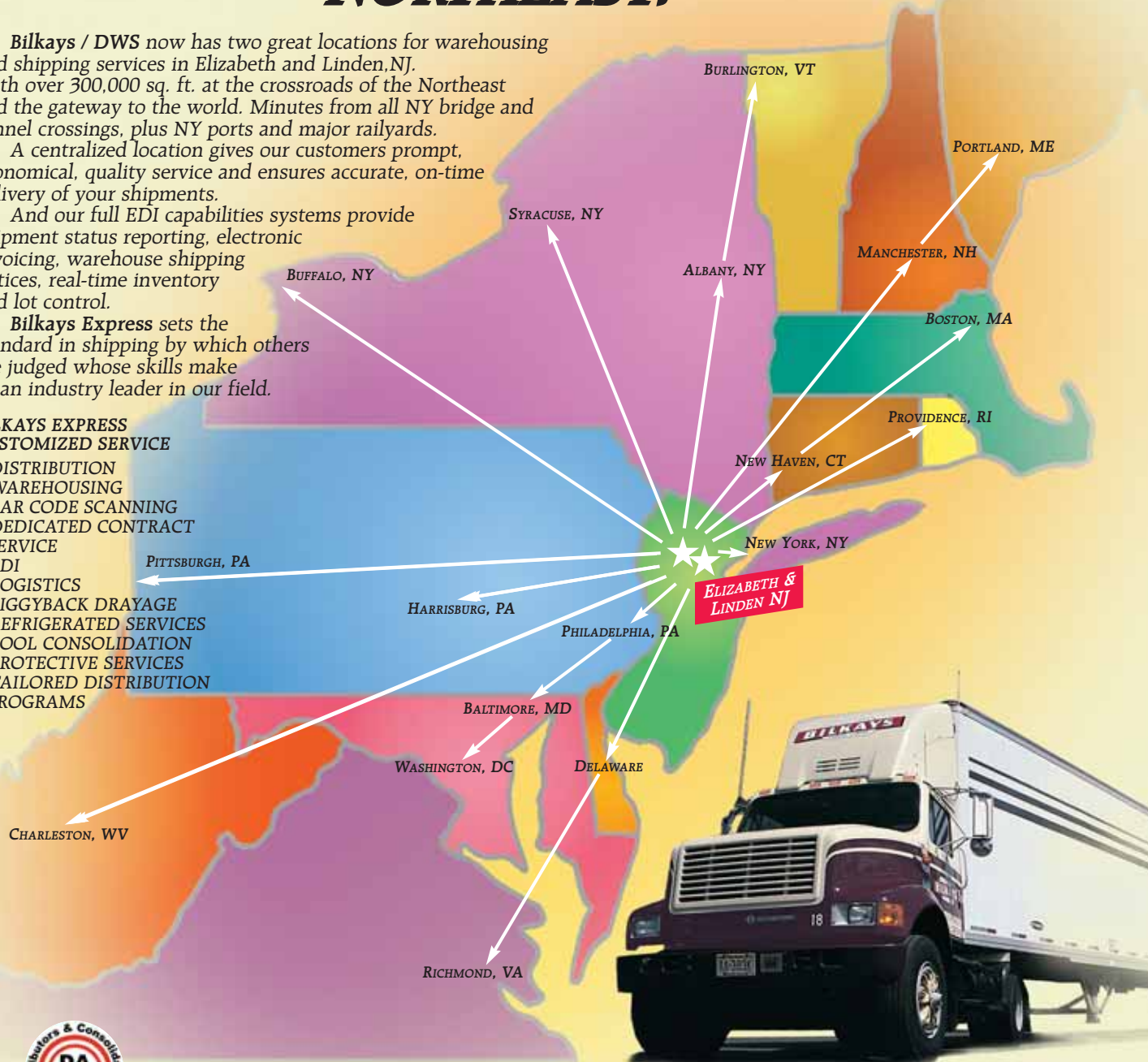
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Casebook | by Mike Breslin

HUMANITARIAN AID

The Logistics of Doing Good

Imagine receiving thousands of different products and pieces of equipment from hundreds of sources around the United States, and not knowing what each shipment will contain until it arrives at your facility.

It may sound like a supply chain nightmare, but it is business as usual for MedShare, a Decatur, Ga.-based nonprofit organization that recovers and redistributes surplus medical supplies and equipment.

MedShare's inbound shipments can include up to 25,000 different product codes. Volunteers and staff sort the products delivered each day, enter them in inventory, and allocate warehouse space to hold the items. Then they pick and pack the items into custom orders, load them into containers, and ship them to any one of 80 developing countries, where recipients may have limited knowledge of customs clearance.

Adding to the complexity is the urgent need to ship supplies in response to life-and-death situations, such as the January 2010 earthquake in Haiti.

"Our biggest challenge is that we don't know what products we will get or when we will get them," says Rob Oviatt, MedShare's operations manager. "It's like standing under a waterfall and trying to direct the water into different buckets."

RECOVERY TIME

Founders A.B. Short and Bob Freeman organized MedShare in 1998 to address the critical healthcare needs of underserved populations throughout the world, and the environmental threat posed by medical waste. The organization aimed to recover perfectly good discarded medical supplies and used medical equipment that would otherwise be sent to a landfill, and recycle it to lifesaving ends.

To date, MedShare has donated more than \$70 million worth of medical supplies and equipment,

Nonprofit organization
MedShare distributes
recovered medical
supplies to the places of
greatest need.



and shipped more than 560 40-foot containers to hospitals and clinics in the developing world. In addition, MedShare has outfitted more than 1,000 international medical teams with \$2.3 million worth of supplies. Ninety-six percent of MedShare's revenue goes to program services—only the balance is spent on administration and fundraising. This kind of output is possible only because of a lean, hard-working staff supplemented by many volunteers and generous donations.

From humble beginnings as a one-person operation in donated warehouse space, MedShare has grown into a

and individuals to recover and recycle supplies such as gloves, medical-surgical kits, surgical instruments, stethoscopes, wheelchairs, hospital beds, patient monitors, and sterilizers—virtually every kind of patient care product except prescription drugs.

COLLECTION AGENCY

MedShare pioneered the concept of collection bins when it began partnering with Atlanta-area hospitals. Hospitals generate a huge amount of medical waste, much of it unused supplies. When a medical supply enters a patient's room, the patient is charged for

by incineration to ensure the greatest liability protection.

By working with hospital administrators and staff, MedShare has helped develop a culture of recycling into strategically located bins, which a MedShare driver empties weekly.

Some hospitals in California are even beginning to pay MedShare for the recycling service. "In the beginning, we collected for free to get the supply, but after the success of the paid California collections, we are trying to replicate that process in Georgia," says Oviatt.

In addition to collecting materials from hospitals, MedShare relies heavily on the support of medical supply manufacturers, distributors, and other NGOs. The bulk of materials collected from these donors are products with cosmetic or packaging damage, discontinued items, and overstocks.

INVENTORY MANAGEMENT

MedShare required a specialized software solution to serve its unique logistics model. "We've had our current inventory system since 2006—the *Primarius* medical supply recovery, inventory, and accounting management tool from ECCA Payroll and Business Solutions," Oviatt explains. "ECCA designed a custom program for us, because we manage inventory on a box level, not pallet level."

Donations from hospital bins come to MedShare warehouses, while package, truckload, and less-than-truckload shipments arrive via common carriers and corporate donor fleets.

"Usually, the shippers pay the freight charges, unless it's a product we urgently need and they can't pay," says Oviatt. "Then we draw on our small shipping budget."

MedShare's 1,000 to 1,200 monthly volunteers work in a large, temperature-controlled office area separated from the warehouse, sorting items by box-level categories.

After sorting, data entry staff enters product codes and box numbers into the *Primarius* system and boxes move to inventory. MedShare uses bar codes



MedShare provides container shipments of medical products to sustain supply in developing countries.

national organization that has inspired a number of similar initiatives. Today, the organization operates two distribution centers: a 50,000-square-foot office and warehouse in Decatur, outside Atlanta, and a 34,000-square-foot center in San Leandro, Calif., near San Francisco.

MedShare works with hospitals, clinics, manufacturers, distributors, non-government organizations (NGOs),

it, and by law it cannot be used again. For many procedures, hospital personnel use medical-surgical kits that contain several separately packaged items, some of which may not get used. Before MedShare, these valuable supplies were dumped in the trash.

Hospitals recognized that in addition to wasting supplies, the practice was hurting them financially because of the rising costs of medical waste disposal. The discarded supplies are treated as a segregated stream and must be destroyed

on box labels only, but has recently budgeted to buy handheld scanners.

Primarius features a Web-based application that lists available medical supplies. Qualified recipients use the system to place orders and put biomedical equipment, which is not listed on the site, on their wishlists. MedShare adds as many wishlist items as it can to each shipment.

ALL IN ORDER

At the Decatur headquarters, Amanda Paniagua, MedShare's shipments manager, ensures that consignees have tax exoneration and that container documentation is in order. All containers are classified as humanitarian aid, so consignees should be able to import into their country duty-free.

But humanitarian shipping is different from commercial logistics, where consignees are experienced at clearing customs and picking up containers.

"We work with people who have little or no experience with customs or logistics," says Paniagua. "Their priority is saving patients' lives, and they often don't have the time or understanding to work with customs agents and bureaucratic formalities.

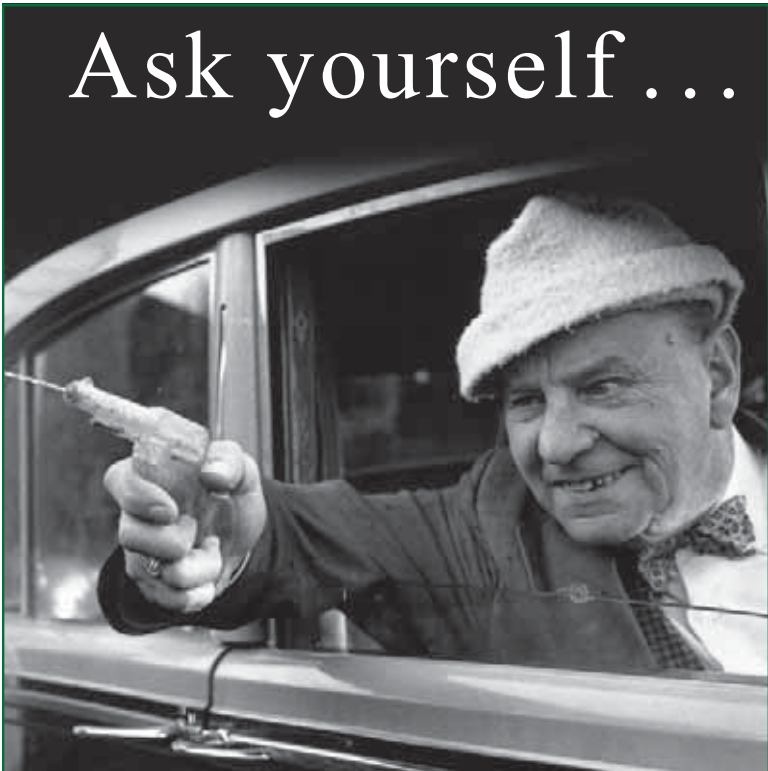
"Despite all our efforts to prevent it, the worst-case scenario is having a container arrive at port and finding the

consignee has missed an important government requirement," she adds.

MedShare, however, has the support of logistics companies such as Missionary Expeditors, a freight forwarding company with more than 50 years of

with, so we dove in."

MedShare's model of giving has helped save countless lives, alleviate pain, and prevent diseases in developing countries. It is a shining example of the logistics effort at its finest. ■



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UPS

UPS expanded its Louisville, Ky., Worldport air package sorting facility, a project that has been underway for four years. The completion of the work enables the hub to process 416,000 packages per hour, up from 350,000 per hour. The expansion increases to 70 the number of aircraft parking bays at the facility, helping to optimize the UPS air network by allowing more planes to use the Worldport facility each night. The \$1-billion expansion increases Worldport's footprint by 1.1 million square feet to 5.2 million total square feet, and the hub now contains 155 miles of conveyors.

www.ups.com

800-PICK-UPS

FedEx

Shippers can upload international shipment documentation electronically with FedEx Electronic Trade Documents. The new solution automates the preparation and flow of international documents to ensure documentation arrives earlier for broker review, even before the courier picks up the shipment. It also streamlines customs clearance by providing more time to identify and resolve any potential paperwork errors, and eliminates the need for manual paperwork, which reduces the risk of lost, missing, or damaged documents.

www.fedex.com

800-GO-FEDEX

SHIPPING CONTAINERS

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▲ Trucking Equipment: Carrier Transicold

The Vector 6600MT hybrid trailer refrigeration unit delivers 59,000 BTU per hour of cooling capacity, 15 percent more than similar conventional units. The unit uses its diesel engine exclusively to drive an electric generator that powers an all-electric refrigeration system.

www.trucktrailer.carrier.com

706-357-7223

◀ CONTINUED FROM PAGE 189

sustainable crates are made of domestic plywood from certified forests. Because they collapse, the crates take up less space in trucks or railcars than assembled crates. Assembled using stainless steel fasteners, V-Crates are durable and strong enough to stack up to eight high when loaded without racking.

www.versi-panelenclosures.com 866-928-5710

MATERIALS HANDLING

Jungheinrich

The Jungheinrich 2,500- to 4,500-pound capacity reach truck features a multi-functional control handle with simultaneous drive, lift, lower, and auxiliary hydraulic functions, as well as low-effort electric power steering for precise control with minimal effort.

www.jungheinrich-lift.com 877-JH-FORKS



▲ Materials Handling: Yale Materials Handling Corporation

The ESC030-040AC series of three-wheel electric stand-up lift trucks provides lifting capacities of 3,000 to 4,000 pounds in applications including retail distribution, food production and processing, general warehousing, and freight transportation. Each truck features precision load positioning that allows operators to more effectively control the truck's position while working on an incline, such as on a dock or in a trailer, minimizing the likelihood of product damage from unintended load contact.

www.yale.com

800-233-YALE

Toyota Material Handling USA Inc.

Enhancements to the 6,000-pound capacity pallet truck include a dedicated walkie-type control handle with large dual-directional thumb-wheels and angled hand grips for greater maneuverability and simplified operation with either hand. A new 12-inch standard tire on the 6,000- to 8,000-pound capacity center-control rider pallet truck and 10,000-pound capacity tow tractor reduces road vibrations and provides improved ride quality over the previous 10-inch diameter drive tire. All product enhancements are designed for pallet

truck usage in distribution centers, retail operations, and cold storage applications.

www.toyotaforklift.com

800-226-0009

Hyster

The new internal combustion S50CT cushion-tire and H50CT pneumatic-tire lift trucks offer lift capacities of 5,000 pounds. These models use 12 percent less fuel than comparable models and were designed to maneuver in tight spaces, making them suitable for use in warehouse and loading dock applications.

www.hyster.com

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PRODUCT SPOTLIGHT



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AIR

American Airlines (AA) Cargo

An express temperature-controlled service, ExpediteTC, is now available for shippers requiring a specific temperature range during transit. AA Cargo personnel monitor temperatures at various points during transit, performing dry ice and battery maintenance as needed. ExpediteTC shipments also receive specialized handling at both departure and arrival airports to ensure the desired temperature remains constant. Each shipment is tracked via AA Cargo's high-visibility monitoring system throughout transit.

www.aacargo.com

800-CARGO-AA

Brussels Airlines Cargo

Brussels Airlines Cargo launched operations to four new destinations in West Africa. Four flights a week travel from Accra, Ghana, via Monrovia, Liberia, and two weekly flights serve Ouagadougou, Burkina Faso; Abidjan, Ivory Coast;

Cotonou, Benin; and Lome, Togo. The new routes were made possible by the addition of a fifth Airbus A330-300 into the Brussels Airlines' fleet. The aircraft offers 10 tons of available belly-hold cargo capacity.

company.brusselsairlines.com 516-740-5200

▼ Materials Handling: Intelligrated

Capable of speeds up to 30 cases per minute, the Alvey GS100 family of palletizers is suitable for large, multi-line palletizing projects or smaller operations interested in converting from manual to automatic palletizing for ergonomic or labor-saving reasons. Designed for applications including food, beverage, consumer goods, and general manufacturing, the series features a compact, modular design with a small footprint for facilities with limited floor space.

www.intelligrated.com

877-315-3400



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Corsairfly

French carrier Corsairfly began non-stop twice-weekly service from Miami International Airport to Paris Orly Airport. The service operates Monday and Friday with a Boeing B747-400.

www.corsairfly.com

954-332-6089

TRUCKING

Con-way Freight

As part of a major safety initiative, Con-way Freight equipped nearly 1,300 new Freightliner Cascadia 2010-model tractors with a range of advanced driver alert and truck control technologies designed to prevent accidents and improve safe driving performance. The suite includes tools that provide for rollover stability, front collision warning with adaptive cruise control, and lane departure warning.

www.con-way.com

800-755-2728

Averitt Express

Averitt Express expanded its flatbed trailer operations from 12 flatbeds to more than 50, with plans to add another 50. The company offers flatbed services in key markets such as Birmingham, Ala.; Atlanta, Ga.; Cincinnati, Ohio; Louisville, Ky.; and Nashville, Tenn.

www.averittexpress.com

800-AVERITT

Estes

Estes accelerated freight processing, reduced freight handling, and utilized direct lanes to reduce transit time to Edmonton and Calgary from five days to three. The service is available from terminals in Houston, Temple, San Antonio, Dallas, Fort Worth, and Oklahoma City.

www.estes-express.com

866-ESTES4U

Southeastern Freight Lines

Southeastern Freight Lines expanded its Savannah, Ga., service center with the addition of 20 freight doors. The remodeled service center features a completely reconstructed office, a dock upgraded with the latest high-efficiency lighting, and new electronic security features. The on-site maintenance facility has also been remodeled with new lighting and technology updates.

www.sefl.com

800-637-7335

OCEAN

Ocean World Lines (OWL)

OWL introduced cargo management service in Asia, including worldwide door-to-door air, ocean, and ground transportation. Designed to help importers better manage inventory levels and improve vendor compliance, the service is supported by new offices in Hong Kong, Shanghai, Shenzhen, and Qingdao. The new service also supplies advanced knowledge of vendor-delayed orders so proactive decisions can be made based on real-time visibility of the purchase order's status, including open and booked POs.

www.oceanworldlines.com

516-616-2401



▲ **Warehouse Equipment: Kelley**
Designed for facilities with limited loading dock space, the HULK Kombo Dock enables dock-to-grade lift access. With a vertical range of up to 60 inches, the independent hydraulic scissors lift has a lifting capacity of up to 20,000 pounds. The Kombo Dock can be interlocked with dock doors, vehicle restraints, and other equipment via a master control panel to ensure safe and reliable operation.

www.kelleycompany.com

877-558-6960

Mitsui O.S.K. Lines Ltd. (MOL)

MOL announced a new all-water service to expedite cargo moving from major Asian ports to key destinations on the U.S. East Coast, via the Suez Canal. The South China/Vietnam-U.S. East Coast service operates nine ships with an average capacity of 5,500 TEUs. The route includes stops in Hong Kong, Singapore, Halifax, New York, Norfolk, Jacksonville, and Savannah.

www.molpower.com

630-812-3700

PARTNERSHIPS

APL Logistics and Sumitomo Warehouse Company

Osaka-based Sumitomo now offers its warehousing and other logistics capabilities in Japan to APL Logistics customers. APL Logistics, part of Singapore's NOL Group, also makes its global services available to Sumitomo customers. The alliance partners jointly market services and offer preferential rates to clients.

www.aplogistics.com

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Savi and ODIN Technologies

Two leading providers of radio frequency identification (RFID) solutions announced they are partnering to offer a software platform leveraging both passive and active RFID technologies. The fully integrated solution will enhance shippers' ability to track and manage in real-time their shipments, supply chain assets, and transport conveyances such as containers and vehicles.

www.savi.com	888-994-SAVI
www.odintechnologies.com	866-787-RFID

SOFTWARE
MIC Customs Solutions

Extended functionality in MIC Customs Solutions' global trade compliance software addresses Mexico import and export processes, including self-filing, bonded warehousing, and free trade agreement/solicitation management.

www.mic-cust.com	248-304-2831
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▲ Ocean: CMA CGM

The largest CMA CGM containership ever to call at a U.S. port, the 8,500-TEU *CMA CGM Figaro*, joined the Bohai Rim service linking China and the U.S. West Coast. The vessel departed Los Angeles for Oakland before crossing the Pacific for Dalian, Tianjin Xingang, Shanghai, and Ningbo in China. The ship features an oil recovery system that significantly limits environmental impact should there be an incident at sea; an electronically controlled engine that reduces oil and fuel consumption by 25 percent and three percent, respectively, while allowing the vessel to operate at super eco-speed of 14 to 15 knots; and equipment for connecting to on-shore electric power during dock-side operations.

www.cma-cgm.com	757-961-2100
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Intek Integration Technologies

Warehouse Librarian supply chain execution software is now available through a new Internet-based deployment system, the Intek Cloud online platform. This new technology gives distribution centers an alternative to operate all or part of the software suites using Intek's server infrastructure at any or all distribution sites, rather than deploying the software on their own IT hardware.

www.intek.com	425-455-9935
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HighJump Software

HighJump now offers its *Warehouse Advantage* warehouse management system (WMS) in a cloud delivery model, allowing shippers to access the WMS via a Web browser. The solution executes strategic processes such as receiving, putaway and flow-through; inventory management; order processing; replenishment/pick/pack; loading and shipping.

www.highjump.com	866-HIGHJUMP
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3PLs

BDP International (Vietnam)

Headquartered in Ho Chi Minh City with operations in Danang and Hanoi, the new subsidiary of BDP International offers freight logistics and transportation management services, as well as a vendor management tool, BDPSmart Vù.

www.bdpinternational.com 215-629-8900

National Retail Systems Inc.

The new Vendor Direct Logistics service enables Chinese manufacturers to create vendor-controlled inventory management solutions for retailers in the United States. The service suite includes China transportation services, value-added services, consolidation, freight forwarding, customs clearance, pier drayage, warehousing, and distribution. All services

are provided by SinoNRS, an exclusive joint venture formed in 2007 by NRS and Sinotrans, China's largest logistics provider.

www.nrsonline.com 201-330-3677

Globe Express Services

A new corporate office in Ottawa, Ontario, complements Globe Express Services' locations in Toronto, Montreal, and Vancouver.

www.globeexpress.com 800-874-8827

Zenith Global Logistics

To serve home furnishings shippers, Zenith Global Logistics opened a regional freight hub in Atlanta dedicated to its home delivery service and split container program.

www.zenithcompanies.com 800-937-3876



▲ Software: Paragon Software Systems

Paragon Resource Manager compiles data about all drivers and vehicles used by a company, including their availability, and hours worked each day. Transportation managers use this information to create hours-of-service compliant schedules with even workloads. Levelling driver workloads over one time period reduces overtime costs and the need to hire extra drivers, and gives transportation managers greater flexibility at peak times.

www.paragonrouting.com 972-934-6755

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FLEET OPTIMIZATION

Milestone Equipment Corporation

The ECO-MODAL fleet optimization program manages and redistributes intermodal fleet capacity between asset-based intermodal companies. Fleet services include buy outs, sale and lease back, remarketing and subleasing, as well as providing fleet capacity for spot market and peak season needs.

www.milecorp.com

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TRUCKING EQUIPMENT

Demountable Concepts Inc.

The new ISO Container Adaptor Frame allows a standard 20-foot ISO container to be quickly secured and transported by straight-truck on a demountable flatbed truck body. Once the container is unloaded, the flatbed can be loaded with freight for the return trip.

www.demount.com

800-254-3643



▲ RFID: Motorola

The MC9090-G RFID ER handheld RFID reader features extended-range bar-code scanning with the ability to capture bar codes from as close as four inches to as far as 40 feet. Designed to withstand rigorous use in extreme environments and a variety of working conditions, the reader is suitable for use on the manufacturing floor, in the warehouse, on the loading dock, and in the yard.

www.motorola.com

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WEB

Container and Pooling Solutions (CAPS)

The CAPS-TRAC 3.0 online container tracking tool offers new filtering capabilities and enhanced navigation, with the option for customers to track containers and additional assets.

www.usecaps.com

888-873-2277

PeopleNet

A new Web site provides fleet management technology resources such as case studies about automating processes to minimize cost drivers, safety-related whitepapers, and regulatory updates to help trucking firms manage operations more efficiently.

www.peoplenetonline.com

888-346-3486

FREIGHT FORWARDING

WIL Lines Shipping

WIL Lines Shipping, a worldwide logistics integrator with offices throughout the United States, Africa, Middle East, and Europe, opened an office in Tripoli, Libya.

www.wilshipping.com

305-594-9577

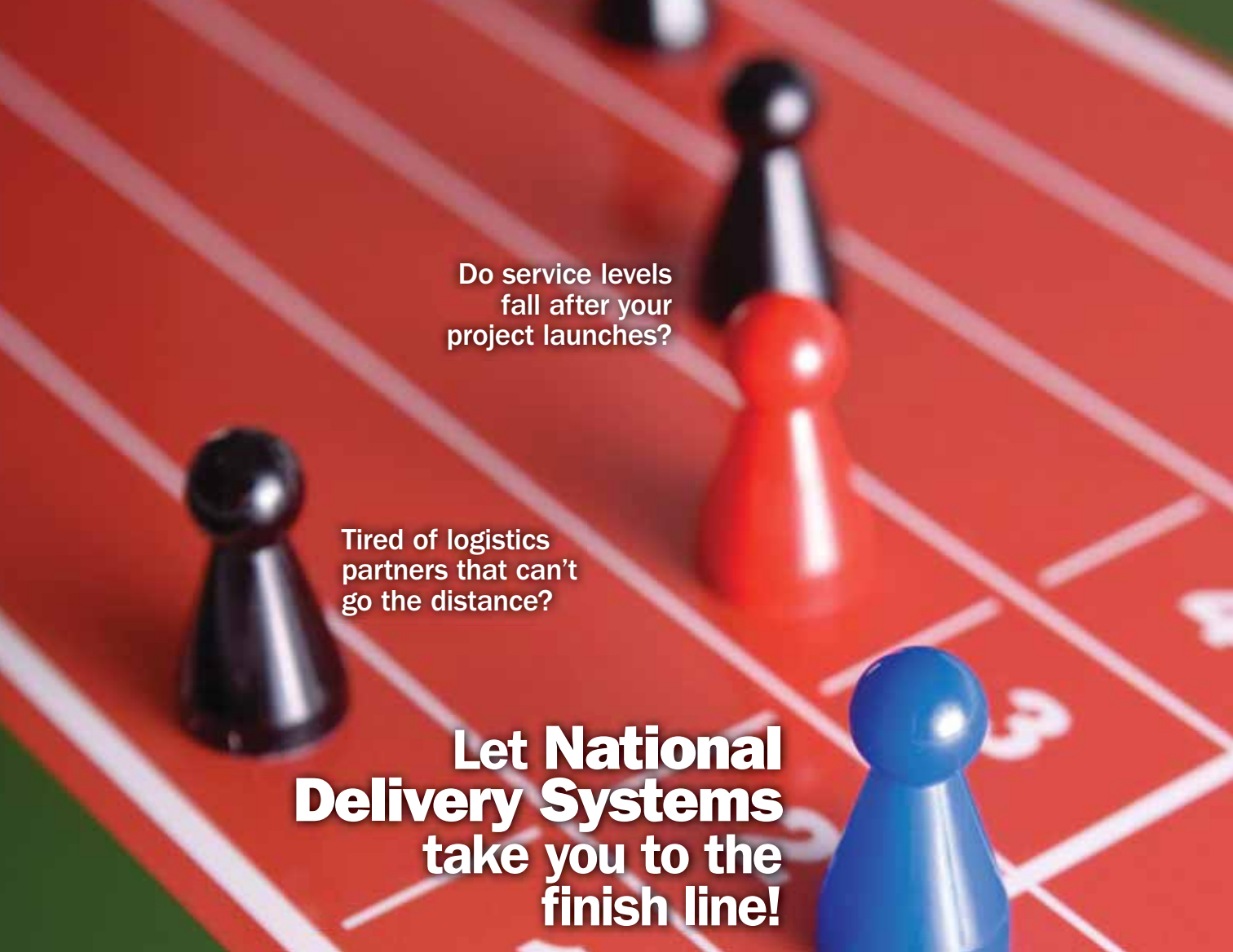
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C.H. Robinson Worldwide, Inc.

TITLE: *Considering China's Warehousing Options*

LENGTH: 12 pages

DOWNLOAD: <http://tinyurl.com/CHRobinson>

SUMMARY: Pursuing warehouse solutions in China may be a fast-growing trend, but is it the right move for your business? For many companies, the benefits of implementing a warehouse solution in China far outweigh potential drawbacks. In *Considering China's Warehousing Options*, you'll learn:

- Why China is a warehousing hotspot.
- Available warehouse options and programs.
- Benefits of warehousing in China.
- Challenges to consider.
- 4 key implementation strategies.
- Advantages of outsourcing to a global 3PL.

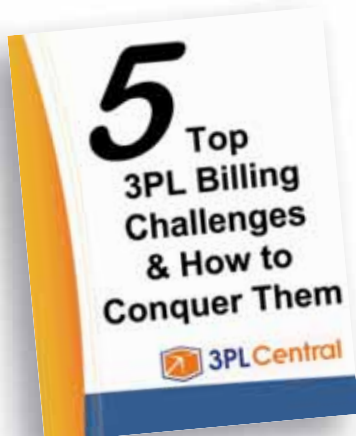
U.S. Xpress

TITLE: *The State of Truck/Rail Modal Share: An Analysis for Transportation Customers*

LENGTH: 19 pages

DOWNLOAD: <http://snipurl.com/ilmode>

SUMMARY: According to *Inbound Logistics* Publisher Keith Biondo, "The *Truck/Rail Modal Share* whitepaper is a 'must-read' for all logistics professionals. I know that because our readers have downloaded this whitepaper more than any other we've offered. As capacity tightens across the modes, this whitepaper delivers valuable insight into the strengths of both truck and rail. It can also help logistics pros in the search for 'greener' supply chain options." The *Truck/Rail Modal Share* whitepaper was written by Noël Perry, the principal for Transportation Fundamentals Inc., and a 30-year veteran of both the rail and trucking industries.



3PL Central

TITLE: *5 Top 3PL Billing Challenges and How to Conquer Them*

LENGTH: 10 pages

DOWNLOAD: www.3plcentral.com/3plbilling

SUMMARY: This free whitepaper tackles the top five 3PL billing challenges and outlines industry best practices that ensure revenue optimization in today's multi-client 3PL environment. Download now to learn how to improve billing and invoicing processes, and structure transaction and storage fees designed to maximize 3PL profits. This whitepaper presents real-world billing and invoicing principles designed to save time and boost 3PL profitability.

PHH Arval

TITLE: *2010 Green Survey*

LENGTH: 4 pages

DOWNLOAD: www.phharval.com/greensurveyresults

SUMMARY: In this whitepaper, PHH Arval reports the results of its annual industry-wide survey of public and private sector fleet managers on the subject of the environment. Among the key highlights:

- 49 percent of fleets are measuring emissions.
- 74 percent of fleet managers are reaching out to drivers for their help.
- 42 percent see costs as a barrier to greening their fleets.

For more details about these and other findings, request the full whitepaper.



Kane Is Able

TITLE: *Collaborative Distribution: How CPG Manufacturers and Retailers Can Save Millions and Embrace the Green Revolution*

LENGTH: 8 pages

DOWNLOAD: <http://kaneisable.com/ebook>

SUMMARY: Every day, CPG products make their way to the country's largest retailers—goods from different manufacturers shipping to the exact same destinations, but all following their own line of supply. This redundancy inflates costs, blocks our roads, and pollutes our air. We need an alternate model for CPG product distribution. A free whitepaper by Kane Is Able, Inc., explains how Collaborative Distribution could be the next major advance in supply chain management. Download now.

ChemSW, Inc.

TITLE: *How to Successfully Contract Chemical Tracking To Managed Services Providers*

DOWNLOAD: www.ChemSW.com/contractwp.htm

SUMMARY: ChemSW's new in-depth whitepaper examines best practices for contracting chemical inventory management to managed services providers. The ongoing economic turmoil is driving many organizations to look for new ways to streamline work flows, refine process efficiencies, reduce operating costs, and implement technology that increases productivity. Contracting chemical inventory tasks to a chemical management services firm, or implementing an on-demand Web-based SaaS solution, are two ways to accomplish these goals, regardless of your business type or size. For details, download this whitepaper.



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Did you ever search online for a logistics solution without having a specific company name?

Search engines spit back thousands of unusable responses. But *Inbound Logistics* is here to help, by compiling the most comprehensive directory of leading logistics and transportation Web sites, organized by category.

THERE ARE TWO WAYS TO USE WEB_CITE CITY:

- 1 Keep it near your keyboard when seeking specific transportation/logistics sources or just to become familiar with new industry players.
- 2 Go to the online version of Web_Cite City – fast and searchable by keyword – at inboundlogistics.com/web_cite

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3PD Inc. • www.3pd.com

Each year, 3PD makes nearly five million deliveries (and counting) for some of the biggest names in business. That's a lot of deliveries, a lot of doorbell ringing, and a lot of focused last-mile logistics experience that we can turn into a competitive advantage for you.



A&R Logistics • www.artransport.com

A&R Logistics specializes in bulk transportation, packaging, distribution, and logistics. A&R provides dependable, quality services to meet your distribution and logistics needs. Through analytical reviews, A&R customizes timely, cost-effective solutions for your company. Put A&R's experienced staff and extensive affiliate network to work for you, and realize global solutions in a changing worldwide market.



Access America Transport • www.accessamerica.com

Access America Transport (AAT) is the premier transportation provider in North America. Our commitment to our customers sets us apart from the competition. Our services include: truckload, LTL, heavy haul, and specialized shipping. We offer 24/7 customer support, and AAT is an expert in expedited as well as JIT freight. Our LTL tool enables shippers to instantly compare rates, book freight, and manage all their carrier relationships with one click. Access America is PowerTrack enabled, DOD and GSA approved, Six Sigma certified, and a Smartway-approved carrier. Please visit our Web site today to get started.



ADS Logistic Services • www.adsip.com

ADS is an award-winning, full-service 3PL provider offering public and contract warehousing, distribution, and fulfillment services designed to move your product with maximum speed, accuracy, and cost efficiency. ADS proudly received *Inbound Logistics'* prestigious Top 100 3PL Providers award for many years. With more than 15 years of experience, ADS has the cutting-edge technology, extreme cost containment strategies, and high level of expertise required to solve any logistics challenge. Visit www.adsip.com or contact Bruce Mantz at sales@adsip.com.



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Affiliated Warehouse Companies Inc. • www.awco.com

Affiliated Warehouse Companies Inc. specializes in marketing and sales to the public and contract warehousing industry, with headquarters in New Jersey and offices in Illinois and California. We work with reputable warehouse companies that have dry, a/c, cooler, freezer, and hazmat space and services across the United States, Canada, and Mexico to assist with customers' needs. We can get you rates from our reputable warehouse clients at no cost or obligation.

AFN-Advantage Freight Network, LLC • www.afnww.com

If you are looking to expedite a single piece of freight across country, set up dedicated routes, or want to manage your supply chain more efficiently, talk to AFN today. AFN focuses on your unique needs and applies analysis and ingenuity to find the answers that no one else can. AFN thinks around corners and moves beyond traditional resolutions to better manage your supply chain challenges.



Agility • www.agilitylogistics.com

Agility is a global provider of integrated supply chain solutions with more than 32,000 employees, 550 offices in 100 countries around the world, and more than \$6 billion in annual revenue. A publicly traded company, we offer our customers truly personal service and flexible solutions tailored to meet their individual business needs.



Bender Group • www.benderwhs.com

Bender Group is a customer-centered logistics and consulting partner that helps you transform problems into profits. For more than a half-century, the Bender Group of companies has offered a full range of logistics services, providing the functions you need for the efficient, effective storage and flow of your products to your customer. Bender Group's solutions will help you enjoy the benefits of your own distribution center with no capital investment, or improve the supply chain you already have. Let us know how we can help you grow.





Big Dog Logistics • www.bigdoglogistics.com

Big Dog specializes in designing customized solutions for customers who want more than a cookie-cutter approach. Big Dog provides and manages shipments, warehousing, sorting, staging, and delivery with precise timing that reduces costs and keeps critical parts, spares, and finished goods moving at the pace of your business. The company has established a track record of exceptional customer service by focusing on creative logistics solutions and consistent service quality across every customer's network. Find out more on Big Dog Logistics' Web site.



Bilkays Express • www.bilkays.com

From dedicated contract service to distribution, logistics, and EDI, Bilkays Express sets the standards in shipping by which all others are judged. Businesses throughout the Northeast depend on Bilkays' accurate, on-time delivery for all their shipping needs. Why? Because Bilkays gets the job done better for less by maintaining a modern state-of-the-art fleet so you can be sure your shipments are on the road to an on-time delivery.



Bulk Connection Inc. • www.bulkconnection.com

Bulk Connection Inc. (BCI) specializes in providing transportation services for liquid/dry bulk, truckload, and LTL shippers nationwide. Recognizing the transportation needs of its customers, BCI has also established strategic alliances with airfreight, intermodal, and international freight organizations. Through its network of carrier partners, BCI has used its ability to mobilize and coordinate large volumes of equipment in emergency situations to help customers get the job done on time and in budget.



Cardinal Logistics • www.cardlog.com

Cardinal Logistics Management is a fully integrated logistics and transportation solutions provider with proven technology solutions, industry-leading experience, and hands-on involvement from our senior leadership team. Cardinal combines dedicated contract carriage, warehouse/DC and inventory management, and specialized home/jobsite delivery services to help companies optimize their supply chains. Cardinal's customers include KraftMaid Cabinetry, Office Depot, HD Supply, CHEP, and many more. Visit us at www.cardlog.com.



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CHEP • www.chep.com

CHEP issues, collects, conditions, and reissues more than 300 million pallets and containers from a global network of service centers, helping manufacturers and growers transport their products to distributors and retailers. Combining superior technology, decades of experience, and an unmatched asset base, CHEP handles pallet and container supply chain logistics for customers in the consumer goods, produce, meat, home improvement, beverage, raw materials, petro-chemical and automotive industries.

Cornerstone Systems • www.cornerstone-systems.com

Cornerstone's business is its people. The company's proven professionals provide customers with the best transportation solutions available, backed up by the latest in technological services. Cornerstone's rock-solid transportation solutions include: intermodal, truck, rail car, dedicated drayage/spotting, on-site logistics, warehousing/transloading, and special projects. Proud to be a Smartway Transport Partner, Cornerstone has nationwide locations serving Canada, the United States and Mexico. Count on Cornerstone—the clear choice for rock solid results.



Corporate Traffic • www.corporate-traffic.com

It's a new world of logistics with emerging markets, time-critical needs, security threats, and extreme fluctuation in supply and demand. Corporate Traffic is the logistics provider with the tools to move your products faster and with greater precision—no matter the challenges. With more experience, capabilities, and cutting-edge technology, Corporate Traffic increases efficiencies and lowers costs. So when it's your money on the line, Corporate Traffic makes all the difference.

Crowley Maritime Corporation • www.crowley.com/logistics

Crowley provides ocean cargo transportation between the United States, the Caribbean and Central America with more sailings to more destinations than any other carrier. Additionally, Crowley offers a myriad of logistics services, including air freight, cargo consolidation, cargo insurance, customs brokerage, distribution (including pick and pack), freight forwarding, inland transportation (U.S. and foreign), NVOCC, SED preparation, truck brokerage, and warehousing. To learn more, please visit www.crowley.com/logistics.





CRST Logistics • www.crst.com

If you are ready to start moving, CRST Logistics is ready to start driving—driving significant costs from your supply chain. We're a third-party logistics resource, providing transportation brokerage services and freight management to complete transportation outsourcing. We leverage our buying power to find the fastest, safest, most innovative ways to move your products. Anywhere. Visit our Web site to explore our transportation management and supply chain strategy. And let's get going.



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 FreightRater 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 86 years.



DC Logistics • www.dc-logistics.com

Ontario, Calif.-based DC Logistics is a leader in providing creative solutions, with customer service as a priority to meet the transportation and logistics needs of businesses nationwide. Through years of experience, a dedicated staff, and up-to-date technology DC Logistics offers an extensive profile of services—including warehousing and distribution; LTL and truckload; dedicated contract services; and custom audit and inventory.



The Dependable Companies • www.godependable.com

The Dependable family of transportation services is comprised of six main business groups, serving nearly all areas of the logistics industry. Each of the six divisions—DHE, DDC, DLS, DHX, DGX, and DAX—have achieved double-digit growth over the past five years, while earning a reputation for leadership in their respective fields.



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DF Young • www.dfyoung.com

DF Young has more than 100 years of experience providing international businesses with the full range of transportation and logistics solutions. DF Young's customized, person-to-person services are proven to meet today's challenging logistics requirements. DF Young paves the way for international shipments clear across continents, using the most sophisticated air, sea and land transportation services available. Each move is backed by state-of-the-art technology and Internet access that spans the globe.



Dimerco • www.dimerco.com

Over the course of more than 36 years, Dimerco has progressively expanded its service network on a global scale, especially in Greater China. At the same time, it has upgraded its e-commerce platform, the Dimerco eChain System, to meet the needs of global customers. For more information on Dimerco's logistics services—including air and ocean freight, customs brokerage, warehousing, trucking, and consultancy—visit the Web site.



Distribution Technology Inc. • www.distributiontechnology.com

For more than 30 years, Distribution Technology has built a tradition of logistics service excellence and reliability that meets and exceeds the needs of our customers. Through a combination of contract and public warehousing services, flexible freight management, sophisticated software technology, reverse logistics expertise, value-added packaging, and a dedicated organization, we provide you with a winning logistics supply chain partner. Consider us for your local, East Coast, or national coverage.



DSC Logistics • www.dscllogistics.com

With experience, knowledge, and IT—as well as supply chain capabilities that are adaptable, versatile, and focused on changing customer needs—DSC Logistics helps companies reach their business goals. Services provided by DSC include supply chain analysis and design, strategic solutions-based consulting, systems integration, process improvement, and management of logistics operations such as warehousing, transportation, packaging, and fulfillment. In today's business environment, filled with rapid and unpredictable change, DSC manages change and information in the supply chain by using a strategy called sense-and-respond and by being ready for anything!





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.

England Logistics • www.englandlogistics.com

England Logistics offers the flexibility and service of a small company, with the resources and stability of a very large organization. At this Web site you can learn about the transportation services we provide to enable you to manage costs and focus on your core business.



Evans Distribution Systems • www.evansdist.com

Evans Distribution Systems has been enabling customer success for more than 75 years. Evans provides warehousing, transportation, packaging, quality inspection, and complete 3PL management services for a variety of industries. Through its experience, flexibility, and innovation, the 3PL proves to its customers that "it's easier with Evans." Let Evans provide you with all the information you need to meet your logistics challenges.

FAC Logistics • www.faclogistics.com

FAC Logistics focuses on the food service industry and covers all 48 contiguous United States, specializing in the safe and efficient transportation of time-sensitive freight. With more than 100 years of combined experience in LTL, truckload, small package, and refrigerated transportation, FAC holds the competitive advantage. Together with its employees, customers, and suppliers, FAC continues to revolutionize the food service industry. To become part of the team, log on to the Web site today.



**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.

Greatwide Logistics Services • www.greatwide.com

Greatwide has the people, processes and technology to make freight transportation more efficient and cost-effective. Greatwide offers customers an integrated service platform including dedicated, irregular route truckload, full-service truckload brokerage, warehouse-based logistics, and managed transportation services.

**J.B. Hunt • www.jbhunt.com**

J.B. Hunt Transport Services, Inc., one of the largest transportation logistics companies in North America, provides safe and reliable transportation services to a diverse group of customers throughout the continental United States, Canada, and Mexico. Utilizing an integrated, multimodal approach, J.B. Hunt provides capacity-oriented solutions centered on delivering customer value and industry-leading service.

Jacobson Companies • www.jacobsonco.com

What can we do for you? When it comes to supply chain management, the answer is: Leadership, Innovation and Quality Solutions. Everything we do: warehouse operations and management; freight management; full truckload and asset-based solutions; contract packaging and manufacturing services; total staffing solutions; and temporary services. We center these services around our company-wide Can Do commitment to you.





Johanson Transportation Service • www.johansontrans.com

Johanson Transportation Service (JTS) is a third-party logistics provider, NVOCC, and licensed ocean freight forwarder helping companies manage their supply chain with Justified Timely Solutions® that exceed their unique business challenges. Providing unmatched service at a fair price, JTS offers customized freight solutions including: dry and temperature-controlled TL, LTL, ocean and air; rail/intermodal; and comprehensive importing/exporting solutions with one point of contact. JTS adds value with logistics management, consulting, and state-of-the-art technology systems with real-time online tools to facilitate seamless supply chain communications for its customers.



Kane Is Able • www.kaneisable.com

Kane Is Able is a third-party logistics provider that helps consumer packaged goods (CPG) companies warehouse and distribute goods throughout the United States. Our CPG logistics solution includes integrated warehousing, packaging and transportation services specially designed to meet the needs of CPG manufacturers. Kane's complete platform of logistics solutions makes us the right choice for your supply chain. At Kane, we are able. We are the CPG logistics specialists.



Kenco Group • www.kencogroup.com

Adding value to your bottom line—that's the mission of Kenco Logistic Services. For more than 50 years, Kenco Logistic Services has guided some of the most demanding supply chains in the world. Kenco's convergence approach can help you streamline your supply chain and bring a greater return on assets and investments. Kenco invites you to visit this Web site so that you might get to know its services. Then, contact Kenco so that you might truly understand its unique strategic advantages.



Keystone Dedicated Logistics (KDL) • www.kdlog.com

KDL, an award-winning 3PL provider, is a transportation management company with global capabilities and an unwavering focus on developing customized solutions specific to our customers' needs. Applying your business rules along with logistics management principles we utilize, allows our customers to optimize supply chain service levels while decreasing transportation expenses. Contact KDL today for your consultation and free analysis.



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LeSaint Logistics • www.lesaint.com

LeSaint Logistics' overall objective is to provide customers with the opportunity to focus on their core business by offering the full range of third-party logistics services: contract warehousing, public warehousing, hazardous materials management, common carriage, dedicated transportation, transportation management, information management, customer call centers, inventory management, and fulfillment. We provide value-added fulfillment services such as pick/pack and ship, repack, labeling, subassembly, kitting, and returns management, to name a few. We're flexible to our customers' requirements, providing them with the option of selecting from our menu of services, and choosing the capabilities that meet their specific needs.

LTD Supply Chain • www.ltdsupplychain.com

LTD Supply Chain can transform your offshore supply chain by handling the complex challenges of sourcing from the diverse, large regions of Asia and India. We put the pieces together with suppliers, transport carriers, forwarders, consolidators, and other logistics service providers using information technology, experienced people, and processes to manage your supply chain. Whether you are sourcing in China, India, Taiwan, or elsewhere in Asia, LTD works with your suppliers to improve performance, build better relationships, reduce cycle time, and bring bottom-line results to your company.



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.

National Delivery Systems • www.national-delivery.com

National Delivery Systems was founded in 2001 by a collection of owners with a combined 65 years of experience in the transportation and warehousing industries. Today, National's service area spans five states, with terminals strategically located in Maryland, Virginia and New Jersey. With an increased focus on providing warehousing and fulfillment services to customers, National operates more than 220,000 square feet of secure warehouse space to meet every demand.





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.



Nexus Distribution • www.nexusdistribution.com

The most demanding customers will find solutions that meet their needs with Nexus Distribution, a third-party logistics provider specializing in full-service, client-specific solutions. Nexus' dedication to teamwork, technological advancement, and customer satisfaction-combined with a collaborative effort among its people, technology, and location-has made the company a trusted provider of third-party logistics worldwide for more than 25 years. Details are available on the Web site.



NFI • www.nfiindustries.com

Founded in 1932, NFI offers a variety of integrated supply chain services to help businesses manage, grow, and succeed in today's marketplace. The company is one of the largest privately held third-party logistics providers in North America. NFI divisions include NFI Distribution, NFI Logistics, NFI Transportation (Dedicated and OTR), NFI Intermodal, NFI Real Estate, NFI Global, NFI Contract Packaging, NFI Transportation Brokerage, NFI Consulting, and NFI Solar.



The Osborne Logistics Group www.theosborne-logisticsgroup.com

The Osborne Logistics Group-consisting of Osborne Trucking Company, H&O Distribution Inc., and Osborne Logistics, LLC-specializes in transportation in Ohio and the surrounding states. Let the dedicated team of these three third-party logistics providers begin helping you with your supply chain execution today.



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Pacer Distribution Services, Inc. • www.pacer.com

Pacer Distribution Services, Inc. (PDS) specializes in Import Logistics, or servicing the needs of importers looking to move their goods in a timely and efficient manner to market or their ultimate destination. To accomplish this objective and deliver superior service to our import customers, PDS operates multiple facilities in the Los Angeles area that occupy nearly 800,000 square feet. These facilities are located within 18 miles or less of the Southern California ports, thereby making possible a timely and efficient flow of ocean containers.

Penske Logistics • www.penskelogistics.com

Whether you need an LLP partner to oversee all logistics operations or you just want to optimize your warehouse design, Penske Logistics offers a full spectrum of transportation, warehousing, inbound/outbound, supply chain management, and freight forwarding solutions. Its collaborative best teams approach enables Penske to be more than a logistics service provider. Penske provides practical success stories online through case studies.



Performance Team • www.ptgt.net



Performance Team is the only thing that should come between your products and your customers. For nearly 25 years, Performance Team has been offering its expertise to the retail and manufacturing industries with a broad range of supply chain services including: trucking, distribution, logistics, and fulfillment. Through eight domestic hubs, over 3.7 million square feet of warehouse space, and a fleet of more than 350 trucks, Performance Team's skilled team of 3,000 nationwide employees processes approximately \$70 billion in wholesale goods. See why Performance Team annually earns a reputation as the premiere trucking, consolidation, and distribution company in the United States; log on to www.ptgt.net.

The Phoenix Group • www.phoenix3plgroup.com

The Phoenix Group listens carefully to your logistics needs and responds with innovative solutions. By implementing technology, materials handling equipment, and specialized personnel in a perfectly matched and ideally located facility, Phoenix provides customized service programs specifically fulfilling the requirements of each client. The company's seasoned management group is trained in handling and distributing various product lines. For more than 30 years, Phoenix has provided comprehensive, cost-effective inventory management and value-added service programs for most consumer product industries.





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.



RR Donnelley Logistics • www.rrd.com

3PL solutions backed by strength, support, and stability from a leading Fortune 250 company with more than 145 years servicing customers – that's what is behind RR Donnelley Logistics. We offer truckload, LTL, intermodal, same-day time-sensitive delivery, cross-docking/consolidation, and other logistics services including transportation assessment and consultation. Visit our Web site and contact us today to see why we are a different type of 3PL.



Ryder • www.ryderscs.com

Ryder provides a complete array of leading-edge supply chain, warehousing and transportation solutions for multiple industry sectors in the United States, Canada, Mexico, the United Kingdom and Asia. Services range from developing supply chain strategies to managing and executing day-to-day logistics operations. We have over seven decades of experience in successfully partnering with companies in a variety of industries, optimizing their operations and maximizing their bottom line.



Saddle Creek Corporation • www.saddlecrk.com

Manufacturers, distributors, and retailers are making significant changes to their supply chain distribution networks as a result of recent economic challenges. Learn more about emerging trends in the design and management of distribution networks in Saddle Creek's latest study, the 2010 Distribution Network Trends Report. Download at <http://tinyurl.com/saddlecreek10>



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SEKO Worldwide • www.sekoworldwide.com

SEKO prides itself on a commitment to customer service, whether it's a 2 a.m. pickup for a critical industrial part for a plant that is 4,000 miles away, or the cost savings achieved from proactive communication with your vendors overseas. SEKO offices have the knowledge and expertise to expedite or to consolidate, depending on your need. From Hong Kong to Amsterdam, SEKO knows how to serve its clients. As a non-asset-based third-party logistics provider, SEKO has the flexibility to meet your supply chain needs using a variety of modes and carriers.

Serec of California • www.serec.com

Serec of California provides an exceptional array of fulfillment, retail compliance, import distribution, and warehousing services, thanks to our state-of-the-art facilities. But we're more than just a warehouse or fulfillment center. We partner with clients to help them maximize their customers' satisfaction. If your customers are happy, we're happy. Our customer relationships have always been—and always will be—our top priority. And while technology takes a predominate focus in regards to how we can accomplish what we do, our main focus has been the same for 40 years: To do our very best for every client, through honest and straightforward dealings, and good old-fashioned hard work.



Shippers Warehouse • www.shipperswarehouse.com

Shippers Warehouse is a well-established regional provider with strong knowledge and insight into the economic and political infrastructure of the Dallas/Fort Worth region. All the facilities operated in the Dallas/Fort Worth metroplex are food grade, and consistently rated excellent and superior by AIB. Let Shippers Warehouse help you match your requirements to the appropriate location, whether it be a new facility, an existing facility, or additional space that can be leased in the area. Details are available on the Web site.

SRC Logistics • www.encore-inc.com

SRC Logistics, Inc. is the premier provider of third-party logistics services in Southwest Missouri. Our service offering includes public warehousing, contract warehousing, fulfillment services, distribution, reverse logistics, and custom software services to manufacturers, distributors, and retailers in a variety of industries. As a subsidiary of Springfield Remanufacturing Corporation, SRC Logistics is an employee-owned company.





Sunrise Logistics Inc. • www.sunriselogisticsinc.com

At Sunrise Logistics, we specialize in delivering supply chain solutions customized to fit your needs. Let our team of experts help you plan for long-term success, while responding to the daily challenges of business. Services include: temperature-controlled freight; competitive just-in-time deliveries; third-party storage and forward logistics; intermodal and backhaul opportunities; state-of-the-art storage facilities; value-added logistics services; and leading communication technologies. Check out our Web site or call us today at 888-518-8502.



TLC-Total Logistic Control • www.totallogistic.com/services

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THE LAST MILE

That's a Wrap

With so much cost literally wrapped around consumer goods, businesses are growing increasingly sophisticated in how they design and execute packaging strategies.

Biodegradable and recyclable packaging is fashionable. So is minimalism. Smaller footprints are cheaper, create less waste, and allow SKUs to be consolidated more efficiently. Whether supply chain strategy or marketing savvy, companies are drawing attention simply because of the packaging they choose.

Binalot, a Filipino fast food restaurant chain, uses a unique wrap for its food. Order Tocidobo—salted eggs, tomatoes, and rice—for example, and you'll get a banana leaf to go. It's biodegradable, promotes Filipino culture, and supports the local economy. Banana leaf packaging is core to the business. The restaurant's name is derived from a local word for "wrapped."

In the Philippines, bamboo is nearly as ubiquitous as bananas. It's a fast-growing grass, has a tensile strength similar to steel, and is the latest hot packaging supply. Dell uses it for cushions inside boxes shipping new Netbook computers and plans on expanding its application to other products.

Elsewhere, businesses are packaging product the way consumers want it. Burt's Bees uses a TerraSkin wrap for bar soaps. The paper-like material is actually three parts recycled calcium carbonate and dissipates into a powder when exposed to humidity and sunlight—a green innovation that is popular among the company's loyal customers.

And Wrigley is doing a double take, removing aluminum foil wrappers from its gum packages in favor of paper. The company expects the move will conserve the equivalent of 60 million aluminum cans annually and reduce costs by 13 percent. The decision has baffled industry experts because aluminum is easily recycled. But a recent survey found that 19 percent of respondents prefer their gum and mints to be wrapped in eco-friendly packaging.

It just goes to show that retailers and manufacturers value product quality—but they also care about how they present that value to the customer.



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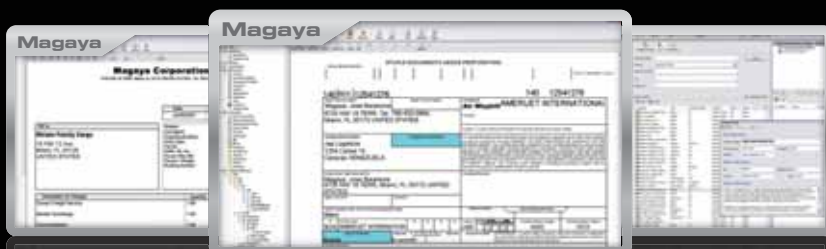
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