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World trade: a severe victim of the recession

Source: EIU
Volume down especially in auto, industrial materials

Source: US Bureau of Census
Dollar exchange rate stimulating exports

Source: Oanda
Imports and exports to rebound

Source: EIU
Cellular fleet: chronic over-supply

- Fleet capacity expanded by 40%
- Almost 600 ships on order
- ~10% of vessels still laid up
- Carrier losses and restructuring
- Slow steaming
- Vessel size: how large is too large?
- Rates: where we are at today
Pricing discipline and “The Outlook”

- Coordinated action
- Maersk and the TPSA
- Confidential contracts
- Shipper strategies
- Container rate outlook
- Ports and terminals
- Specialized services
Services

- BSI University
- Supply Chain Management Consulting
  - Market Access Strategies
  - Risk Mitigation Strategies
  - Supply Chain Organization and Management
  - Supply Chain Technology Strategies
  - Transport Infrastructure Investment Planning
- Global Cost and Pricing Analytics
  - Supply Market Forecasts
  - Optimization Analysis
  - Custom Metrics and Benchmarks
- Global Market Data and Industry Profiles
- Interim Management
Boston Strategies International helps supply chain executives make critical supply chain decisions that involve investment and risk by forecasting the evolution of supply markets and technologies. Our mission is to help our clients develop globally competitive supply networks that maximize Supply Chain Value.™ Our products and services include:

- **Supply Chain Consulting** that helps supply chain leaders make high-stakes decisions related to mergers & acquisitions, market entry, capital investments, outsourcing, off-shoring, and make-or-buy
- **Cost, Pricing and Risk Analysis** that helps financial and operational managers plan and budget by providing benchmark, best practice, and forecast data tailored to their companies’ supply chains
- **Custom Industry Research** that helps investors and policy makers identify emerging issues that affect their supply chains, and quantify the impact that they will have