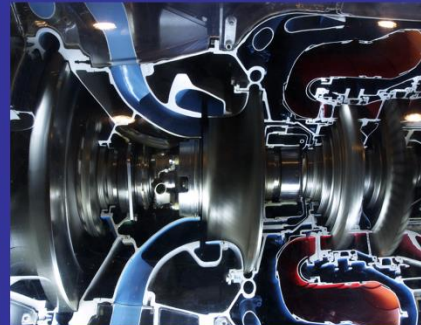


# Logistics MANAGEMENT

January 2010



## 2010 Logistics Rate Outlook *Ocean*

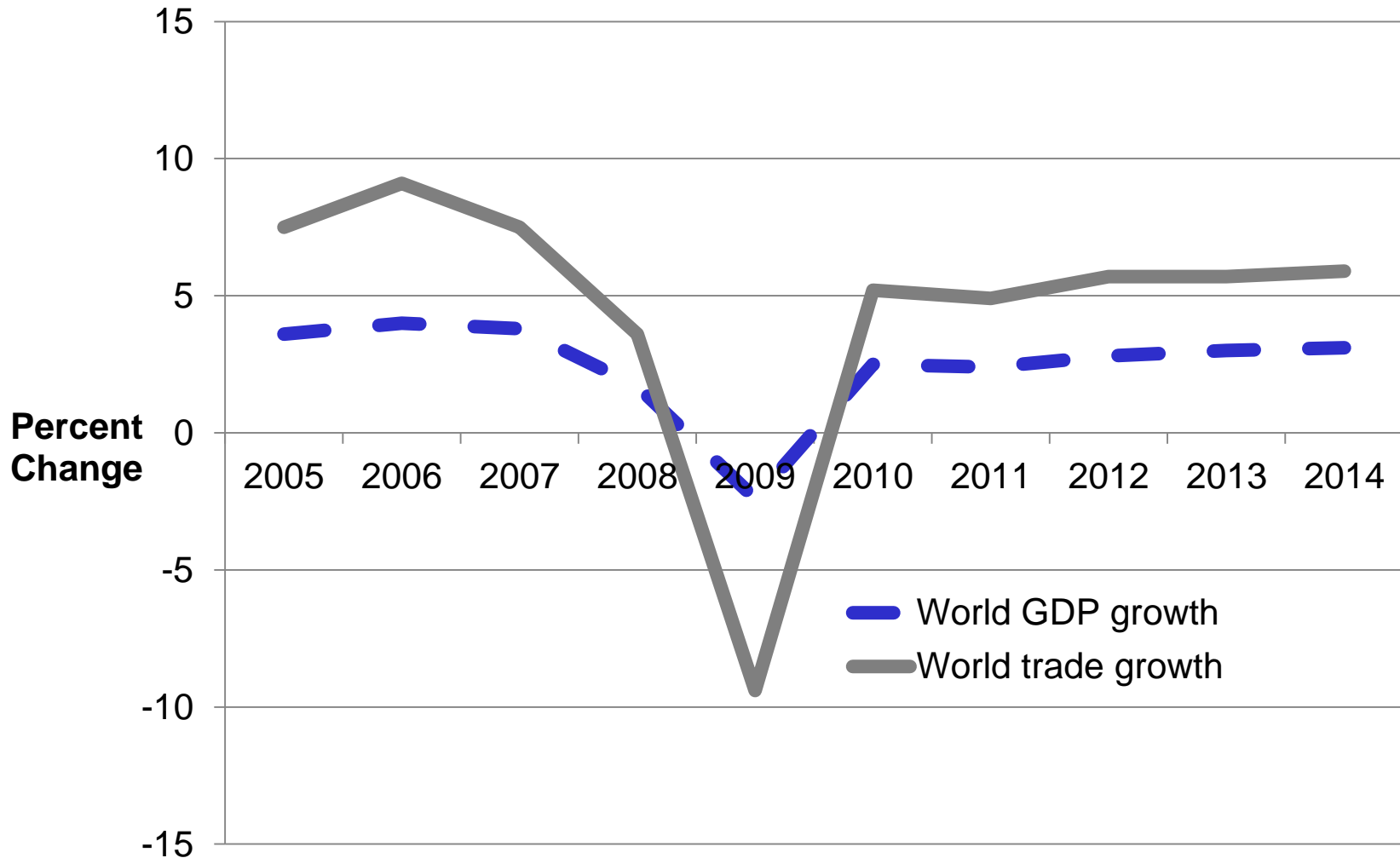
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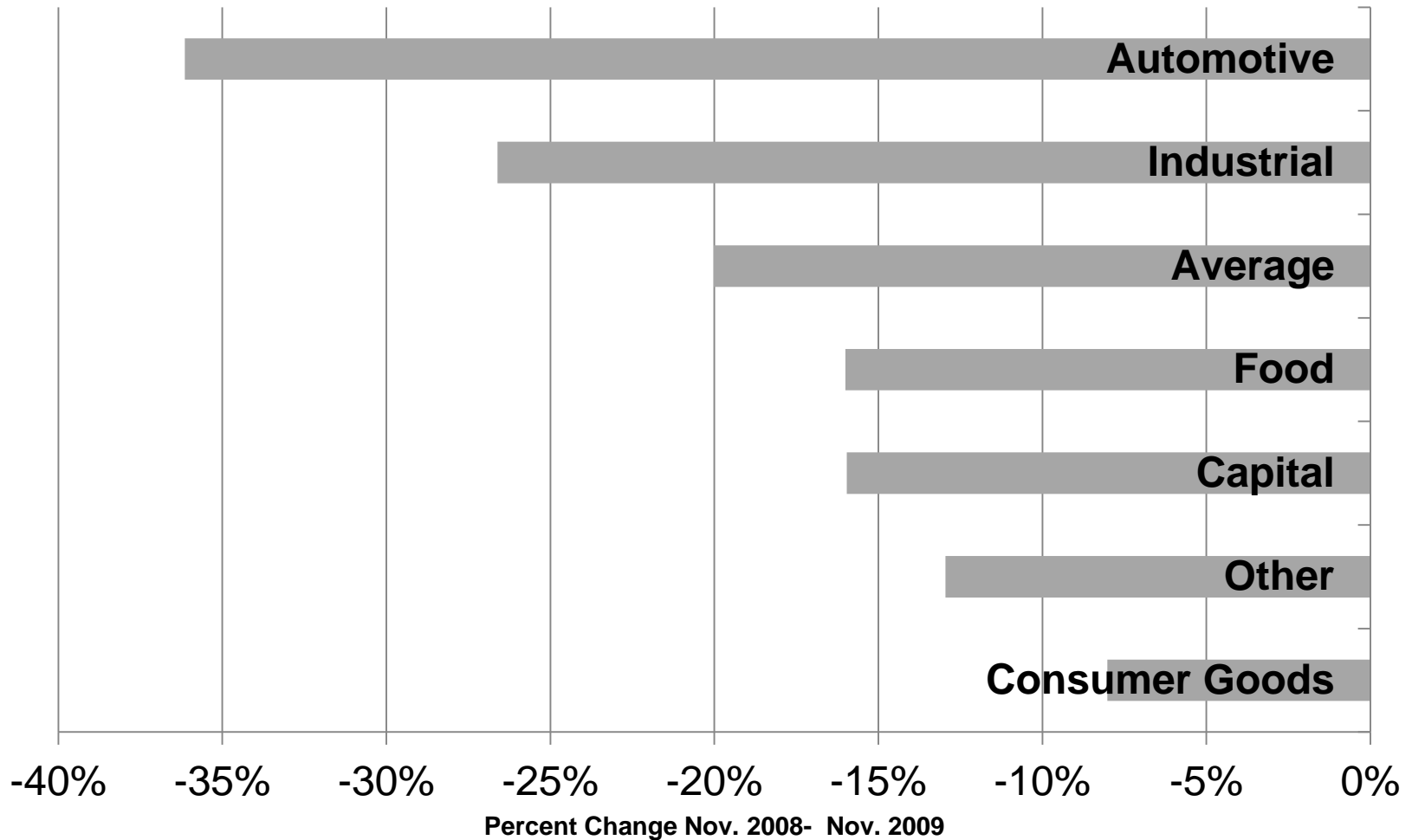
# World trade: a severe victim of the recession



Source: EIU



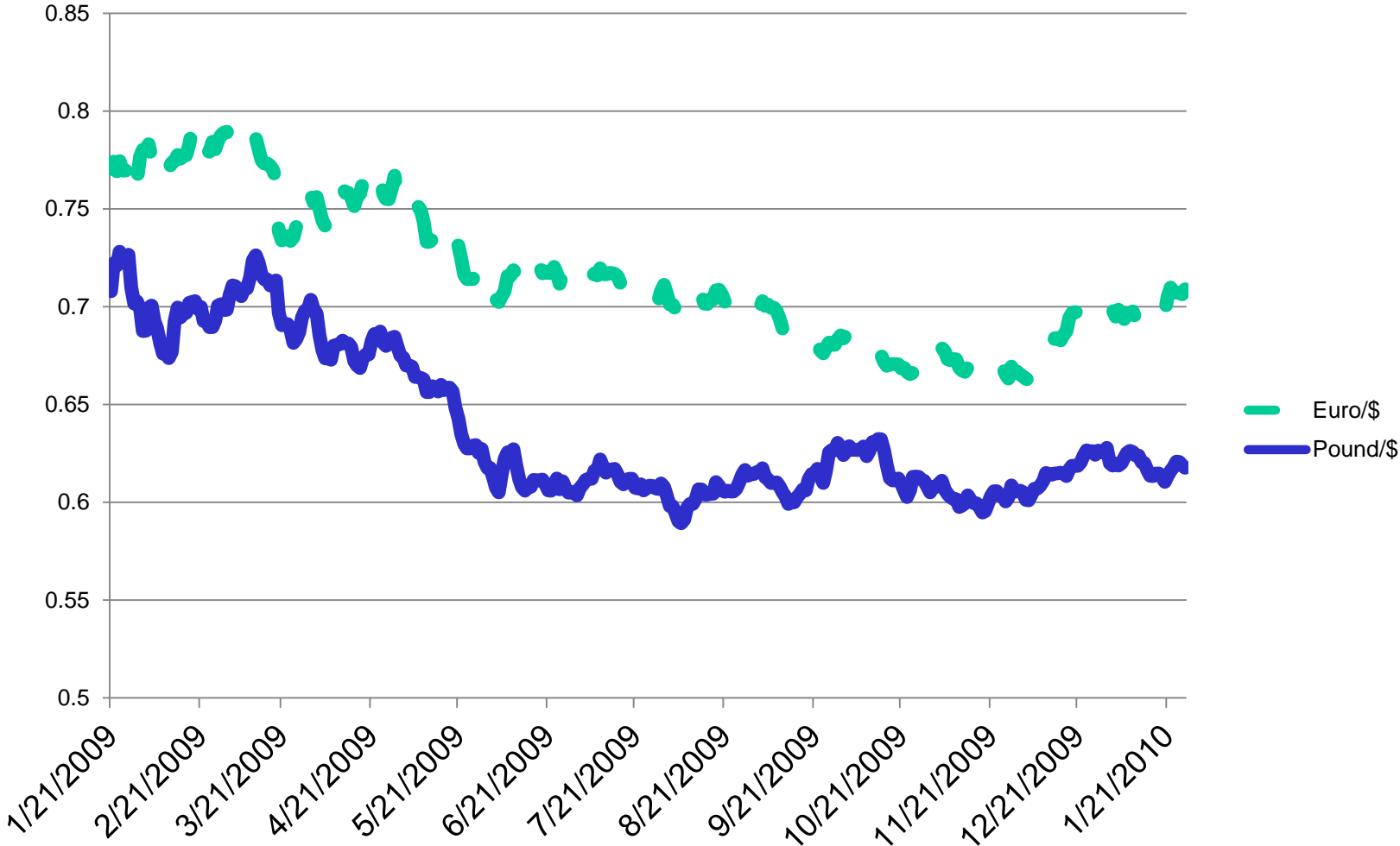
# Volume down especially in auto, industrial materials



Source: US Bureau of Census

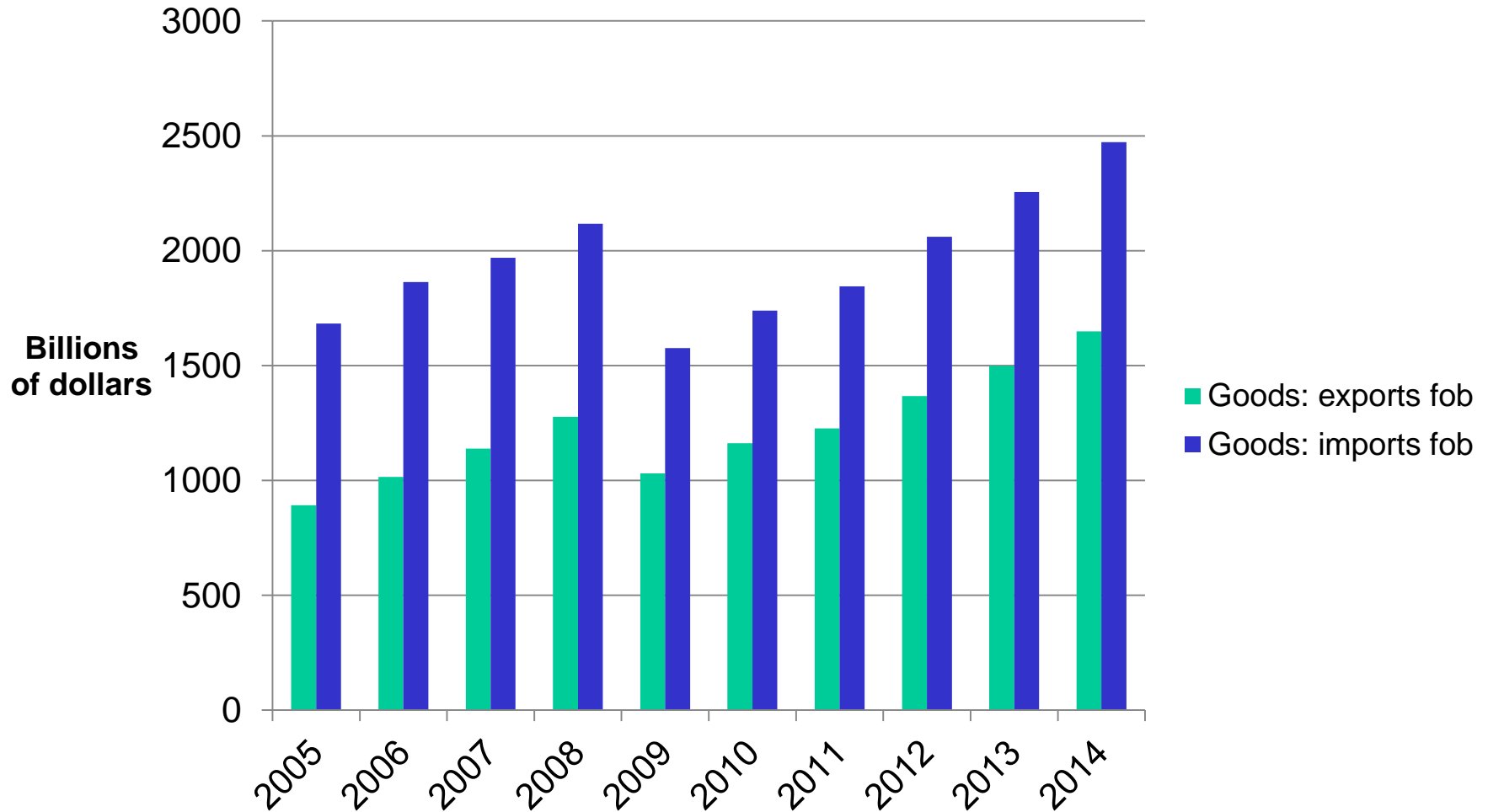


# Dollar exchange rate stimulating exports



Source: Oanda

# Imports and exports to rebound



Source: EIU



# Cellular fleet: chronic over-supply

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- 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”

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



# Services

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- 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





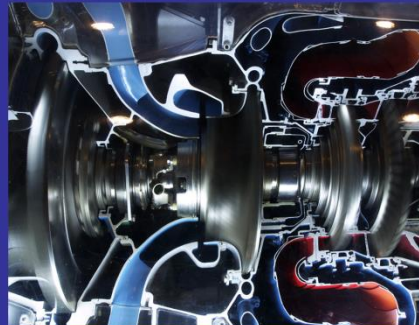
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