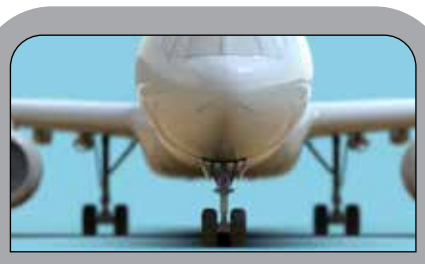
Voice of the Independent

SEPTEMBER 2022 | SERVING THE INDEPENDENT FREIGHT FORWARDING COMMUNITY | No.129



Box lines face uncertainty as rates fall

Some customers are looking to renegotiate contracts

ASIAN carriers are seeking to calm concerns over a post-Covid market slump amid falling rates and pressure from shippers to renegotiate contract rates.

Addressing press, Wan Hai's general manager Tommy Hsieh said the current softening was largely due to China's zero-Covid policy and the resulting lockdowns, especially with port city Shanghai locked down from March to June.

"Please don't feel pessimistic, the peak season for intra-Asia shipping is starting and we expect volumes here to be better than on long-haul routes," Hsieh said.

"I know there are concerns that with the recent large orders for newbuildings, we could be facing oversupply, but older and less environment-friendly vessels will be withdrawn from the market, and this should balance out tonnage supply.

"Around 10 per cent of the in-service fleet are aged 20 years and above, and these will inevitably be scrapped."

However, Hsieh's comments did not disguise the fact the demand for Chinese exports has dipped in recent months, with European and US inventories full and an apparent long-term game plan that will see some companies move out of China.

The EU Chamber of Commerce in China (EUCCC) said while companies remain committed to China, its Covid policy and the conflict in Ukraine has given some "pause for thought".

> "Around 10 per cent of the in-service fleet are aged 20 years and above"

In its report of a survey conducted earlier this year, the EUCCC warned: "Some [companies] may vote with their feet should the current wave of uncertainty continue, especially when other markets offer more predictability."

Nearly a quarter of those surveyed were considering moving planned investments out as a result of China's Covid policies, the most in more than a decade, and double last year's total.

The war in Ukraine has had a pronounced impact on investor confidence with some seven per cent now considering moving current or planned investments out of China as a result and 33 per cent viewing the market less favourably given geopolitical tensions.

Amidst this backdrop, Yang Ming's chief operating officer Chang Chao-feng admitted that falling spot rates had led to pressure from shippers to renegotiate contract rates.

Believed to be the first line to confirm that it had received such demands, Chang said the situation had become more challenging than had been expected at the end of the first half as a result of a "sharp drop" in spot rates.

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Airfreight market bullish despite high stock levels

AIRLINES are holding out hope for a peak season, despite many major companies facing overstocking and high inventory levels.

The airfreight market picked up slightly in August, traditionally the quietest month, leading to optimism from carriers that they will see something of a peak season.

Xeneta's CLIVE Data Services said the slowdown in demand had eased off. June and July saw year-on-year falls in demand of 8 per cent and 9 per cent – but in August, this tailed off to 5 per cent.

BRUCE CHAN
Stifel

While capacity has recovered over the summer, airlines are looking to reduce flight schedules as economies slow down. Jet fuel prices are also nearly 10 per cent lower than a month ago, and spot prices are also at their lowest point since September last year, boosting demand.

Niall van de Wouw, chief airfreight officer at Xeneta, said: "In many respects, this latest data is quite remarkable, relative to the two previous months.

> "In many respects, this latest data is quite remarkable"

"The strong dollar and its parity with the euro clearly boosted demand from Europe to North America, with westbound load factor remaining above average for the month, at 61 per cent, and rates stabilising on these lanes.

"If the fall in demand is easing, however, as August indicates, a capacity shift could see us return to a seller's market again and load factors return to the mid 70 per cent to 80 per cent range. It is fair to assume volumes will be higher in November than in August."

However, Bruce Chan, logistics director for Stifel, was more cautious.

"Trends in 2022 point to looser capacity … with some softening in consumer demand … more supply-chain fluidity, albeit in a still-constrained system, and better and more preparation from shippers -especially large ones, with earlier build-up of inventory.

"There has been some bifurcation of inventory strategy, with large retailers able to amass more buffer stock - and perhaps too much - while smaller retailers, brands, and industrial shippers are still struggling to normalise their inventories.

NIALL VAN DE WOUW
CLIVE Data Services

"We believe we've seen peak freight volumes. Rates are likely to remain stable or grind directionally lower. The long-term trend is reversion toward mean, with the key question being how fast and to what degree. But the market is by no means predictable, in our view, especially near term."

Big retailers, including Walmart and Target which had brought forward orders, are now looking at discounting stocks and cancelling further orders, while Newell Brands, a distributor, said retailers were reducing orders, following the previous trend to bulk up inventories. Samsung said it expected to see a continuation of the downturn in chip sales.

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Rates cause pressure on contracts

"In May, whether for shipments to Europe or the US, both shippers and our side were optimistic when negotiating contract rates, which were high," said Chang.

"The sharp drop in the spot rates has caused great pressure on these contracts. We will discuss the contracts with our customers. At present, some still respect the spirit of the contract.

"We won't take the initiative to request immediate modifications and adjustments, but we'll make necessary adjustments, depending on the contract."

Chang said part of the problem with recent forecasts had been that with several variables in play, it was becoming increasingly difficult for shipping companies to make more accurate assessments of how the long-term would play out.

Although the carrier's H1 net profit rose 60 per cent, to US$4 billion, Chang said the market reversal had been faster than expected, and the company was now cautious about the outlook.

"If the Russia-Ukraine conflict is resolved, the European economy can recover, while the Chinese communist party will also hold its twice-a-decade leadership congress in October and it's worth paying attention to whether it will ease its zero-Covid policy then," he added.

"Also, will the US mid-term elections stimulate economic growth?"

US rail strike called off – for now

A major US rail strike has been averted – for now – after talks between six major US railways, 12 unions representing hundreds of thousands of employees, and the Biden administration appear to have reached an agreement.

With less than 24 hours before a proposed strike was set to take effect, a tentative agreement supported by all participants – the International Association of Machinists and Brotherhood of Railway Signalman had previously rejected the deal – was reached.

The agreements still have to be ratified by the unions after votes by their members, but they banish the possibility of a strike until 29 September, prompting the railways to cancel the measures they had implemented in preparation for a strike that would have paralysed the US rail network.

President Biden hailed the deal. "These rail workers will get better pay, improved working conditions, and peace of mind around their health care costs: all hard-earned, while the agreement is also a victory for railway companies," he said.

"They will be able to retain and recruit more workers for an industry that will continue to be part of the backbone of the American economy for decades to come."

Contract negotiations had dragged on since 2020, and while some unions had agreed to terms laid out by the Presidential Emergency Board – essentially a 24 per cent wage increase between 2020 and 2024 – several had held out – representing a combined 90,000 workers.

Second wave of strikes planned at Felixstowe

A second wave of strikes will hit the UK's Port of Felixstowe at the end of September and start of October, overlapping with industrial action at the Port of Liverpool.

Unite, representing Felixstowe dockers, was thought to have planned to dovetail the eight-day walkout with strikes at Liverpool, and while not in perfect sync, running 27 September to 5 October will see it cover six days of the 19 September to 3 October action on the Mersey.

One source told Voice of the Independent (VOTI) Unite was "tightening the screws" and it was "no coincidence" that these separate industrial disputes had overlapped.

Unite national officer for docks, Bobby Morton, said: "The latest strike action is entirely of Felixstowe's own making. Rather than seeking to negotiate a deal to resolve the dispute, the company instead tried to impose a pay deal.

"Further strike action will inevitably lead to delays and disruption to the UK's supply chain, but this is entirely of the company's own making."

> "The latest strike action is entirely of Felixstowe's own making"

A statement from Felixstowe expressed "disappointment" in the new strike action, claiming that the collective bargaining process between itself and the union had been "exhausted" and there "there is no prospect" of an agreement being reached.

It added: "The port is in the process of implementing the 2022 pay award of seven per cent plus £500 which is backdated to 1 January 2022."

Unite, however, rubbished the port's position, claiming it had unilaterally ended negotiations after refusing to improve a pay offer, and announced that it would be imposing the seven per cent pay deal on the work force, well below the present rate of inflation in the UK.

Forwarders have seemingly supported the strikers, with the country facing a bleak winter as fuel prices climb and inflation surges – expected to hit up to 19 per cent before the year is out.

With the port operator having generated some £79m in profits in 2021, and the latest accounts suggesting a turnover of £30 billion, workers rejected the imposed pay deal by 82 per cent on a 78 per cent turnout, with the 1,900 dockers now set for their second walkout in as many months.

A forwarder said they could not see this ending any other way than for the port to accept that the cost-of-living crisis meant dockers had no choice.

"If Hutchison is smart, it will act sooner and capitulate on the demands of a pay bump in line with inflation now because, with projections of inflation of 19 per cent by January, the longer it leaves it, the more it will end up paying," the source told VOTI.

"It needs to do this as much for the industry as for the workers, as further strikes there will totally screw everyone over, particularly if two ports are out of action at the same time."

One sector set to face pronounced difficulties in the wake of the overlapping strikes is the haulage business, with expectations that drivers who typically service the two ports will seek work at the UK's open gateways.

Felixstowe handles some 3,000 deliveries a day and there are upwards of 1,000 to Liverpool, leaving some 2,000 vehicles looking to offset lost earnings over the strike period.

"It is no coincidence that the strikes at these two ports have been timed to overlap as it will have an affect not only on the ports but on the wider UK supply chains, with haulage likely to take a notable hit," said one source.

"With the ports closed, the view is hauliers will migrate to open ports, and we'd expect this influx of haulage capacity to suppress the market and drive rates down."

Longer term, the inability to source work – particularly given the present cost-of-living crisis – could result in "haulage firms toppling over", resulting in a reduction of capacity that drives rates up, with many asking why the port operators have not resolved the dispute.

One union representative noted that had an agreement been reached when contract renewals first came up for discussion, the rate of inflation was less than double digits.

The representative said: "By delaying, port operators are only leading themselves towards a higher price as with the rate of inflation climbing, our expectations will climb too as we will need more to ensure we can feed ourselves."

A haulage operator said the problem would be that there was not sufficient work in other UK gateways to cover the volumes hauliers typically handle out of Felixstowe.

"Bearing in mind the trucks will have to run empty to port at the haulier's cost, this will be a big issue for firms. Apparently, there are ship(s) going to Teesport rather than Liverpool but again the trucks have to run there empty.

"Haulage is the tip of the iceberg, all the ancillary industries attached to the importation of containers will suffer greatly and poor old Tesco will have a downturn in takings too."

Philadelphia looks to lure freighters

PHILADELPHIA Airport (PHL) is the latest cargo-focused secondary US hub looking to attract cargo airlines – in particular from New York.

The airport has partnered with Menzies Aviation, Kale Logistics and airport investor AFCO to build new facilities and a cargo community system, which it believes will boost its freight credentials and bring in air cargo carriers.

Jim Tyrrell (below), chief revenue officer for PHL airport, said the partnership would help it achieve the goal of becoming "the airport of choice for logistics on the east coast". He added that the airport's catchment area was ripe, with some 70 per cent of local traffic bypassing PHL for other hubs. PHL is currently served by the integrators, but it is also surrounded by life science and ecommerce companies.

"We have been turning down opportunities because of a lack of facilities. We have never had the capacity to attract new business."

AFCO will develop a 150,000 sq ft building for Menzies, which has widebody access and will soon have six widebody parking positions. The airport, which has a 135-acre plot to develop, plans 24 in total within the next three years.

Amar More, CEO of Kale, which is developing the cargo community system (CCS), said the technology would "help the airport attract more cargo", and that shippers would redirect cargo from other airports.

Challenge Group, which has freighter airlines in Belgium and Israel, said it was in discussions with Philadelphia, as well as Chicago Rockford, which is also installing a Kale Logistics CCS, and Pittsburgh.

Secondary airports are seeing more interest, in part because of labour shortages, and also because of chronic congestion at key hubs such as Chicago. They have also attracted forwarders who have their own controlled air freight capacity, who are keen to avoid passenger hubs.

Handler Menzies is among those who have been scouting secondary airports in the US and head of cargo Robert Fordree said PHL "hit the sweet spot".

"We don't want traditional cargo gateways, we want airports that are willing to invest, and we will be working with a developer we know and trust, as well as working with Kale whom we also know and trust."

Spotlight ON

Enrico Tortolano


dockers' section coordinator
International Transport Workers Federation

Global strikes: United we stand …

"THE first thing to understand is that none of these essential workers want to be going on strike. They want to work, but if they don't take action now and secure a decent pay rise amidst this cost-of-living crisis, they and their families will suffer real hardship in the months ahead.

"These are the same workers who sacrificed so much during the covid pandemic to ensure essential medicines and goods were delivered. It's reprehensible that employers - instead of rewarding them fairly - now want to make them worse off than they were last year. It's vital everyone understand the seriousness of the issue." So said the dockers' section coordinator for the International Transport Workers Federation, Enrico Tortolano.

Tortolano agreed to chat on the proviso that the focus was holistic, rather than zoning in on individual port disputes, because he does not see it as "confined to one sector, or one region… look at the conditions occurring around the world", he said.

"Unions are rising to the challenge, we're not the only sector in dispute," he continues. "Telecoms, rail, education, even barristers are in dispute. And the thing all these groups have in common is they're defending the pay, rights, and livelihoods of working people.

"This needs to be put out there. We are simply trying to ensure that our primary needs of food, homes, energy, transport, and utilities are affordable. That's why I have no hesitation in giving total solidarity to my docker comrades in Felixstowe, Liverpool, Germany and elsewhere."

For others in the industry watching the strikes, the impact has been pronounced but Tortolano believes this year's summer of discontent has seen public support. Forwarders that VOTI approached not only expressed support but also condemned the way some of the ports have approached proceedings, with suggestions that offering a seven per cent pay rise when inflation had hit double digits and calling it "very fair" was…'stupid', to tone down the language.

"I've seen a remarkable change in public reaction and response to these strikes," continues Tortolano. "Normally there's a reasonable amount of public hostility as media moguls start a race to the bottom in terms of workers' wages – pitting worker against worker. This is changing, what we are witnessing today is solidarity across sectors and that's because more people are under the cosh. The current system is failing more and more people. Many cannot get to the end of the month without borrowing. This is people in work, some holding down as many as two or three jobs. If anyone's thinking that's far-fetched, think again. In the UK there are more than one million people using food banks, and some are stationed in hospitals for NHS staff."

> "These are the same workers who sacrificed so much during the covid pandemic to ensure essential medicines and goods were delivered"

Does he see the way port operators are handling disputes as worse in some countries than others? Tortolano will not be drawn into naming the worst offenders, but he does point out that Germany's striking dockers returned to work after securing an inflation-proof deal.

Compounding dockers' belief that they can get a deal done, is the very real expectation that the rate of inflation does not look like slowing anytime soon. Some banks have forecast it hitting 19 per cent by January – just last week those forecasts were saying 18 per cent within the year. And here Tortolano believes the pay rise may benefit the whole economy, as well as ensuring those at the coal face of the logistics sector have enough to eat and heat.

"One of these operators experienced a 75 per cent increase in profits in 2021," says Tortolano. "This year that same operator will enjoy a net profit of $223 million. Then one of the major carriers has generated $8.9 billion in profits. The problem is workers not getting their fair share for their hard work, another is that profits are too high and causing inflation. Profits for the 350 biggest companies listed on the London Stock Exchange are 73 per cent higher than they were in 2019, but wages haven't budged much. We have rising prices and falling wages, so it is clear workers are not the cause of inflation.

"A simple way of addressing this is to get money into the hands of workers, squeezing profits rather than household incomes, and thus bringing prices under control."

Of course, though the striking dockers may have the rhetorical, and anonymised, support of the wider logistics community, it is also a community which is concerned that any pay rises will be borne out by higher costs that they end up paying. Tortolano disagrees.

"We've just spoken about the astronomical profits," he says. "This is about how we structure the economy and reorganising the relationship between labour and capital. The present paradigm stems from the change from the post-war consensus which sought to involve all sectors of society in decisions, to top-down neoliberal capitalism and the financialisaton of the economy.

"We've forgotten that consensus model. Many of the multinationals have forgotten the benefits of cooperation, consensus and a fairer distribution of resources.

"And I do think some are getting greedy. What we've seen is these vast MNCs grabbing the loot and keeping it. This has led to grotesque inequalities of wealth and poverty on a global scale. It's only right that dockers – that all workers – demand decent pay."

What then, can customers do? For Tortolano, the answer is simple: "Show solidarity with port workers in struggle. You do not want the people handling your cargoes to become worse off.

"The big companies have it in their power to end this now. All they have to do is get round the table and offer a fair pay deal that takes account of inflation. If they delay, they'll end up paying more as inflation and costs are rising. So, the companies need to be asking the crucial question."

Which is?

"Why aren't they ending this now?"


ITF Dockers Delegation Visit to Unite Felixstowe Dockers Strike Picket

Focus ON

Air charters: back to ad hoc

COVID injected long-term thinking into the air freight market, as shippers and forwarders scrambled to shore up capacity amidst 18 months of global uncertainty. For the large shipment charter sector, the commencement of Russia's war with Ukraine only added to this, as the world's largest commercial aircraft, the AN-225 was pulled from circulation after it was destroyed.

But the pandemic also put the spotlight back on the importance of cargo, and the need to consider it as something beyond what gets stowed beneath the feet of passengers. Now, that longer-term approach may be dying off, and amid what continues to be an unstable global political moment, the resurgence of dedicated freighters may be of benefit to the small and medium-sized forwarders seeking capacity – at least for those not engaged in project cargo.

Speaking to Voice of the Independent (VOTI) Jamie Peters, who runs Hunt & Palmer's cargo charters service, notes that while the company had been involved in some of the longer-term deals over the pandemic years, many of these are starting to reach their conclusion.

"And the appetite to renew is not so strong," Peters tells VOTI.

This is in part due to the return of passenger capacity, and partly down to the global economic outlook. The charter premiums that carriers are still demanding – especially on long haul large aircraft types – have been widening from the per kilo rates on spot services. That they may be doing this does not necessarily mean customers will pay, with Peters noting that the widening gap makes it "much more difficult" for customers to hedge their bets that over a certain period of time they will be in the black. Consequently, charter bookings appear to be drifting back to the more short-term game they were typically associated with.

> "our one-off charter levels have remained stronger than anticipated along with repeat bookings on certain projects"

"Year-to-date we are reporting higher quotation levels, higher booking levels and more customers than last year (2021 was a record year)," Peters adds. "Therefore, our one-off charter levels have remained stronger than anticipated along with repeat bookings on certain projects."

Peters' may consider the long-term market in gradual decline, but Dan Morgan-Evans, head of cargo for Air Charter Service (ACS), suggests the long-term deals remain in play and are there "mainly" to cope with "continued uncertainty in scheduled passenger services". But he does not consider this an issue for smaller and medium-sized forwarders, nor does he believe the charter market has become unviable for these businesses, with rates and capacity within their grasp.

"I wouldn't say [long-term deals] have affected the one-off/ad-hoc charter business," Morgan-Evans tells VOTI. "The long-term deals are mainly to cope with the continued uncertainty in the scheduled passenger services, reduced services, and reduced capacity. It allows forwarders a more stable capacity – whether for consolidated freight or for single shippers that again are affected by the same issues, but the ad-hoc market is still very much alive and well."

Igor Mantrov, who heads up cargo charters and projects at Aviocharter, agrees and says that there remains capacity on the market.

"Although larger companies have set up long-term charter deals with airlines there is still some capacity on the market," says Mantrov. "We constantly monitor the situation and provide regular updates to our clients who are small to medium-size freight forwarders, to make sure they get relevant information on relevant aircraft availability in good time."

EDUARDO MARTINS
KPM Logistics

That the space may be there is one thing, but the associated costs of securing charter capacity have climbed in response to the recent market changes. Mantrov notes that average charter prices have increased by 20 to 30 per cent since the pandemic, and with the war in Ukraine continuing, he has seen this surge "in some cases" climb even higher, especially for aircraft such as IL76 and AN-124. How then can smaller operators compete if prices are squeezing them out of the market?

For Morgan-Evans, the answer is simple.

"Same as they always have – call ACS," he says. "Prices have come down considerably since their peak – obviously fuel costs are still influencing the prices though. As we head into the traditional peak season, I would always advise moving quickly in the market to secure the best rates. Trans-Pac and China to EU are the traditional peak routings and with our offices in Hong Kong, Beijing, and Shanghai, we are in a unique position to secure capacity. Our offices around the world work very closely together, linked by our in-house technology to source aircraft for our customers at the best rates and availability in each region."

They may disagree on the extent to which long-term deals are influencing the present state of play, but Peters and Morgan-Evans both concur that there has been a significant dip in prices. For Peters, this drop-off comes despite the high fuel rates and this is in turn influencing the way long-term deals will play out in the coming years.

"Pricing levels have certainly dropped off in recent months despite the high fuel rates," he says. "Some of the larger commitments made by some larger players, we understand have tried to be renegotiated. Demands are not what they were. PPE was a commodity that was in high demand until earlier this year and when that began to fade out, that opened up space on many routes."

JAMIE PETERS
Hunt & Palmer

As a result, for SMEs, there is space to compete, but Peters believes communication remains the vital influencing factor in this.

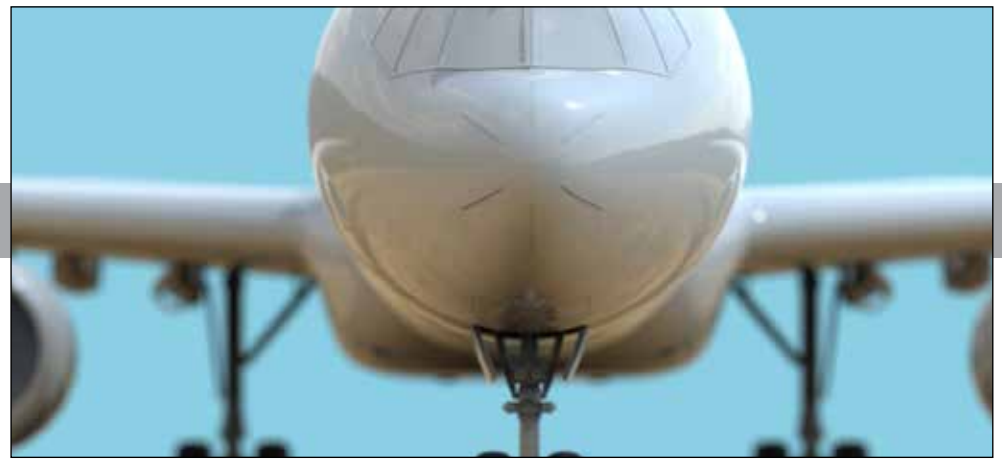
"SMEs can compete, but often the key to any sourcing is a sensible dialogue on rates between all stakeholders if they are serious to secure capacity," he continues. "There has usually always been a premium to charter an aircraft and whatever the per-kilo market yields might be, there is often a higher rate to pay to take a dedicated aircraft. If the end user is familiar with this and willing to pay for that privilege, then a deal can often be sourced."

This reflects Mantrov's position.

"Air charter is a business of trust," says Mantrov. "The advice we provide to our clients can give them a competitive advantage in securing the deal, therefore developing stronger partnerships with our clients is the key."

Nonetheless, for forwarders, market demand for charter capacity remains high. Sales executive for Air Consol at WCA forwarder KPM, Eduardo Martins, tells VOTI that post-Covid, demand has continued to increase. But he also says that while this rising demand has hit freight costs across aviation and for SMEs, the charter sector has proved something of a benefit.

"It is right to say that this demand has been increasing due to the big impact on freight cost post Covid-19," says Martins. "Freight forwarders have been using the freight charter strategy to be more competitive in the market looking for better



Air Charter flying?

service and better freight costs to offer clients. Looking at some of the statistics, you can see that this practice is becoming more and more popular, particularly on routes from China and the US, likely because of the higher volumes of cargo moving on these routes."

Part of the confusion in the market seems to emerge from the fact that the pandemic highlighted the importance of air freight to global supply chains. When those were shut down it became all too apparent that the market was vulnerable to downturns in passenger services. As a result, in the last year a lot of new freighter capacity has been added to the market. This has less been down to new full freighters being pumped out on production lines, and more the result of conversions from passenger to freighter aircraft. This freighter capacity is ideal for fast-moving consumer goods, usually from Asia to the US or Europe, as well as on domestic routes – although not for those engaging in large project cargo. Martins says this will be depressing demand for charter services and plays into the upper hand of the shippers and forwarders looking to use short-term charter arrangements.

IGOR MANTROV
Aviocharter

"The advice we provide to our clients can give them a competitive advantage"

"With the increase of dedicated freighter capacity coming on the market, the necessity for charter service agreements has been reducing," he continues. "This is for the simple reason that the freight cost for the shipper and forwarder for a dedicated freighter is similar to using a charter service, but the risk of using a freight charter agreement is still higher.

"For shippers around the world this resurgence has been received in a positive way because it makes the freight costs reduce in the market for good services. This is called the law of supply and demand."

Martins may be pleased, but Morgan-Evans and Peters both warn that this injection of new capacity could backfire, with Peters describing "the high addition of freighter aircraft" as "somewhat double-sided". On the plus, he considers that extra capacity addresses a sector that had been troubled by the shortfall and was becoming dependent on charter services to keep vital supply chains flowing.

"What does concern me slightly is over-capacity in the near future," Peters continues. "So many airlines in recent times have added significant aircraft (be it from the desert or conversions). If the global economic downturn continues then I would envisage there being too much capacity on some routes and then those carriers who have invested might suddenly find there is too much space, rate wars then begin and the food chain has less to feed from, usually resulting in casualties."

Morgan-Evans espouses similar sentiments, warning that while "freighters are very much in vogue" after years of decline, over-capacity could negatively impact both air freight as a whole and the charter sector. Even so, he says with choice and competition for space it provides a "big positive" which can only help "SMEs in getting value for money". Where though is the demand coming from?

"Residual disruption from two years of Covid is still a factor, whether from lack of capacity, unreliable schedules and flight cancellations or even airport congestion," Morgan-Evans continues. "This year the big uptake has been from pre-Covid traditional markets. Oil and gas sectors, automotive, entertainment – all sectors that have come back strong after the Covid years."

For Peters, demand for charter capacity has come from a wide variety of verticals and regions, including commodities such as oil & gas, government/military, high-value cargo, music & entertainment, satellites, automotive and general cargo.

"Our business continues to come from different regions and remains a global business, spikes come and go at different times, and we can adapt very quickly to opportunities," he adds.

Charter brokers up their game

THIS year has seen CharterSync mark its three-year anniversary - and Air Charter Service (ACS) consolidate its urgent cargo services around a single product. The news marks a period of growth and change within the charter sector that experienced a buoyant pandemic as shippers looked to shore up capacity during a difficult period for aviation, but a boom time for air freight.

Head of cargo at ACS, Dan Morgan-Evans says the decision to consolidate urgent products under the new sub-brand, ACS Time Critical, meant the 24-hour, seven-days-a-week team would be on hand to deliver a range of specialised services, alongside go-now cargo aircraft charters. These include an onboard courier (OBC) and 'next flight out' service, as well as integrated trucking solutions.

"Over the years we have gained a wealth of experience in the time-critical market, starting with go-now chartering, we added onboard couriers, next flight out and trucking to our résumé," says Morgan-Evans. "We continued to expand and improve upon our services before realising that part of our business had evolved into a time-critical services provider. We have completed more than 10,000 OBCs in recent years and added the next flight out service during the pandemic, when travel restrictions limited our couriers' ability to always accompany the packages.

DAN MORGAN-EVANS
Air Charter Service

"Whilst the name helps to clarify what we can offer customers, the structure behind it comes with additional benefits for them. With some shipments it is not always automatically clear what the best option for transportation is, so we are streamlining the process and finding the fastest and most cost-effective solution for every request. There are many other lighter weight options on the market when it comes to urgent transportation services, but we believe that ACS Time Critical is a unique combination and far exceeds these other offerings."

ACS' growth has been matched by the upstart, or start-up, technology-based CharterSync, which has organised more than 3,000 charters in its three years of operating. Co-founder Simon Watson says the fast growth has been matched by a determination to "scale efficiently".

"After achieving a six-figure turnover in year one of trading, our turnover has consistently risen by 84 per cent year-on-year," adds Watson. "When we launched, digital transformation was long overdue in the air cargo charter market. Up to 2019, the air cargo charter booking process was 100 per cent manual, and laborious for both freight forwarders and operators. Freight forwarders looking for air cargo charter services had no option except to make multiple phone calls to identify the best deal for their cargoes – and even when they did make a booking, price transparency was non-existent."

However, with much of CharterSync's growth linked to the pandemic-induced demand for healthcare and pharma products, it now needs to consider the direction for a post-Covid market structure. For Watson, the focus must be "efficiency, price transparency… and a focus on end-to-end logistics that keep forwarders and operators coming back".

Beetles to trigger bill for box cleaning


Farmers in Australia are concerned about the Khapra Beetle

A row over who pays the bill is expected, after Grain Producers Australia (GPA) called again for a levy to cover the cost of cleaning and fumigating containers, in a bid to control the spread of invasive species.

Farmers in Australia are concerned about the Khapra Beetle, which, if introduced, could cause "an estimated A$15.5bn (US$10.6bn) worth of damage over 20 years and a loss of access to important grain-export markets for Australian farmers," according to GPA southern region director Andrew Wiedemann.

Plant pests and diseases – inclusive of native and invasive species – are responsible for the loss of up to 40 per cent of global food crops, causing trade losses and leading to an annual bill of US$22 billion, according to the UN.

But there is, as ever, division over which parties should be held responsible – the owners and operators of the ships they arrive on, the owners of the containers, or cargo owners.

"Ultimately the packer is responsible for what goes into the container, but other operators are responsible for what a container looks like when it is released to the shipper, packer," said Peregrine Storrs-Fox, risk management director, TT Club.

"Ultimately the whole supply chain has responsibility, so the buyer needs to think about what is happening at the time they are buying, that might impact the way cargo is loaded, and ask the seller and packer to take account of that.

"I think at this stage we're open to any ideas, because it is an issue impacting across the supply chain and in destination countries," Storrs-Fox continued. "There are dramatic stories of the impacts on local ecosystems. Every country is impacted, and that may have significant economic repercussions."

The UN has asked representatives from the supply chain industry to form the Container Cleanliness Industry Advisory Group (CCIAG).

Shipping is held responsible for introducing Asian Giant Hornets, colloquially termed "Murder Hornets," as well as the Asian Longhorn Beetle to US shores, with devastating and costly consequences to local crops.

WCAworld Foundation supports Pakistan

WCAWORLD Foundation, a registered charity supporting humanitarian causes around the world, has commenced its aid operations in the areas of Pakistan devastated by recent floods.

In conjunction with WCAworld members Pakistan Cargo Services and MZW Logistics, over US$40,000 of urgent supplies reached victims of the flooding in early September.

Funded by WCAworld, its founder David Yokeum and contributions from member companies, the charity has also been heavily involved in humanitarian support in Ukraine.

Globalink Logistics opens office in Ulaanbaatar, Mongolia

GLOBALINK Logistics is to open an office in Ulaanbaatar, Mongolia. The new office will create up to 10 new jobs, and will enable Globalink Logistics to serve its growing regional customer base with innovative transport and logistics solutions.

Siddique Khan, CEO of Globalink Logistics, explained: "We have witnessed significant growth in the scale and operation of our multimodal transportation business over the past few years. It makes sense to expand our presence in Mongolia to support our strategic plans to scale and expand further into landlocked regions of Eurasia, central Asia, China and Mongolia."

Since 2019, Globalink Logistics has successfully managed dry and temperature-controlled road and rail freight services between the Baltic states, Turkey, central Asia, China and Mongolia. The new office is expected to help Globalink Logistics expand its road, rail and air freight operation in Mongolia, explained Khan.

Non-coastal Africa would benefit from TIR, says IRU

TATIANA REY-BELLET
IRU

THE International TIR Convention could help boost intra-regional trade in Africa by 44 per cent, it has claimed, with the UN urging the continent's landlocked countries to move fast.

Pointing to the experience of countries in Central Asia and Afghanistan following accession, where road freight volumes climbed to 60 per cent, just shy of Europe's 68 per cent, the IRU's director of TIR and Transit, Tatiana Rey-Bellet said TIR made sense for African trade.

"Landlocked countries of Central Asia as well as Afghanistan comprise a well-connected space, which is now covered by the TIR Convention facilitating road freight transit and we have been able to see the difference," Rey-Bellet said.

"The upward economic growth in Central Asia is supported by the growing use of TIR, which makes connectivity more efficient and less costly. This results in growing investments in the region. This goes in contrast with just 16 per cent of intra-regional trade between African countries, which are in urgent need to find similar ways to be better connected."

Transport costs average 50 per cent higher for landlocked countries, and reducing non-tariff barriers is key for bolstering not only these countries' economies but Africa's. Indeed, such are the hurdles faced by the continent's landlocked countries in moving goods that they have just 60 per cent of the exports of coastal neighbours, and pay 85 per cent more on imports.

> "To make landlocked countries better connected, we must tackle the major issue, which is at the borders"

"It is the landlocked countries suffering the most from not being part of this trade facilitating treaty, as they are exposed to trade barriers by their limited options for moving goods," added Rey-Bellet.

At issue is the complexity and costs associated with cross-border road transit across Africa, which includes Beitbridge, a border crossing between South Africa and Zimbabwe, one of the most expensive border crossings in the world.

Costs and bureaucracy have reportedly led not only to impediments to imports and exports, but have also stranded drivers in two-week long bottlenecks as they wait to cross borders.

"Take the route between Mali and Senegal as an example, despite being a [relatively] short distance, it takes drivers around 30 days to get from one country to another, and if goods are stuck in this level of delay the cost for the end customer will be huge," said Rey-Bellet.

"Non-landlocked countries can diversify through access to ports but without reducing the bottlenecks there will be no economic development for landlocked countries."

The TIR system ensures traffic security and facilitation in transit through the principle of mutual recognition, which eliminates the burden of filing a transit guarantee at the entry to each country, allowing trucks to move through each border under the same guarantee.

Identical information on the movement is provided in advance to all customs authorities along the itinerary, with the IRU issuing some US$70 billion in annual guarantees to customs authorities worldwide, with just 0.003 per cent in claims received.

This, said Rey-Bellet, is "thanks to the robust security mechanisms inherent to TIR", that has resulted in 77 contracting parties to the TIR Convention, and the number continues to grow.

She added: "IRU accompanies new countries' public and private sector through the system implementation to make sure that business and customs authorities fully benefit from this tool for better security and better trade and transit facilitation."

While there is strong support for bolstering the number of countries party to the convention, there is also a recognition that strong political will is needed to drive the process of accession to the convention, while efforts should also be made to formalise the trucking sector.

Further to the accession to the TIR Convention, the system can be implemented in the country in less than a year.

Rey-Bellet added: "To make landlocked countries better connected, we must tackle the major issue, which is at the borders. So, we must facilitate border crossings. This means improving security then facilitating transports. Facilitation comes through the TIR."

Cargo loses out as Israel bans 4-engined aircraft

NEWS that Israel has banned four-engined aircraft from 31 March came as a surprise to the industry, and an unwelcome development for shippers and cargo airlines.

The ban was announced by the Israel Airport Authority, which cited sustainability and environmental concerns.

It will have no impact on passenger operations, as no passenger carriers flying to Tel Aviv's Ben Gurion airport are using 747s, A340s or A380s.

But the ban is instead hitting cargo operators. According to IBA, about 98 per cent of four-engine aircraft departures from Tel Aviv this year have been cargo flights.

First and foremost, this affects Challenge Airlines IL, formerly CAL Cargo Airlines, which is based at Ben Gurion airport. Other international all-cargo carriers serving Tel Aviv with 747 freighters include ACT Airlines and Silk Way West Airlines.

There have been suggestions that the authorities may grant exemptions, particularly to Challenge, but observers doubt this will materialise. If the Israeli authorities were to allow it to operate its current service to New York via Liege while barring Atlas Air, the US DoT would likely withdraw permission for the Israeli carrier to fly to the US, one industry executive commented.

> "there will be a need for special cargo and 747s, and when that happens, we will get authorisation to fly"

However, Challenge Group chief executive Yossi Shoukron said that the airline would simply adapt. "Next year, we will replace the 747 with one of our new 767s. But still there will be a need for special cargo and 747s, and when that happens, we will get authorisation to fly. We don't see any major impact on our activity."

The environmental aspect does not present a strong case for the ban on four-engine planes. A 747-8 has considerably lower fuel burn and carbon footprint than an older 777-200. On the passenger side, an A380 may have a larger overall carbon footprint than some twin-engine models, but on a per-passenger basis this is smaller.

In any case, the ban will hardly usher in a significant improvement in CO2 emissions at Tel Aviv. According to IBA NetZero, IBA's finance-focused carbon modelling tool, four-engine planes accounted for a mere 0.8 per cent of departures from Ben Gurion this year, representing 2.2 per cent of total CO2 emissions on departures.

Some observers suspect that the ban has other motives, possibly to forestall a move by Emirates to fly A380s to Tel Aviv. The airline started daily passenger flights with 777 equipment between Tel Aviv and Dubai in June and announced one month later that it would add a second daily flight at the end of October.

Supply chain decarbonisation? It'll all come out in the greenwash

SUPPLY chain decarbonisation, critical as it is, is morphing into something new and very different as the Covid-led transformation of the maritime sector sees the rise of customer-led sustainability pledges away from the traditional regulatory theme.

In a recent study on transport decarbonisation, consultant McKinsey said shippers and forwarders want to pay for sustainable fuels, but there are several barriers preventing the scaling-up of green transport solutions.

But with the transport sector emitting some 7.2 giga-tonnes of carbon – 21 per cent of the global total – there is a lot to pay for. And carriers are not getting the right indicators from their customers.

Those barriers include "a lack of clear demand signals and industry-wide standards and high premiums for sustainable offerings versus conventional ones".

The differential in price between conventional and sustainable fuels is expected to be addressed in next year's International Maritime Organization (IMO) meeting of its Maritime Environmental Protection Committee.

Meanwhile, air cargo fuels are also undergoing similar scrutiny. McKinsey also pointed to a lack of a clear signal for demand in sustainable fuels, with some shippers willing to pay the premium.

"Carriers need to secure sufficient demand through long-term commitments in order to invest in lower-carbon assets and infrastructure."

To address this problem, several initiatives have been developed that put consumer pressure for change in how supply chains operate at the centre. One example is GoodShipping, developed by Dutch company GoodFuels, which produces sustainable biofuels from sustainable sources such as waste products. GoodShipping calculates the amount of biofuel needed to carry a container from A to B, and then calculates the carbon emissions saved.

GoodShipping allows owners and shippers to choose sustainable fuels for their vessels or cargo. On 16 August, GoodFuels' Singapore office said it had successfully supplied a NYK bulk carrier with sustainable fuel.

This is a comparatively simple arrangement, with bulk carriers, on the whole, having a single charterer who can decide to pay a premium for sustainable fuel.

The calculation becomes more complex when there are possibly thousands of shippers and shipments on a containership or, indeed, on a cargo plane or in bellyhold.

> "It will be decades until all ships and ports can offer decarbonised fuels"

"It does not matter where in the atmosphere you substitute a material with a better alternative, as the net result for the atmosphere is the same. In the case of GoodShipping, the material that is in need for urgent replacement is fossil fuel," argues GoodShipping on its website.

Effectively, GoodShipping says, once a shipper or forwarder orders a premium service with reduced emissions, the biofuel can be loaded anywhere and on any ship or aircraft, leading to an overall reduction in carbon emissions.

Carbon reductions will, however, depend on what type of fuels are used, including the feedstock and manufacturing methods. For example, the use of palm oil as a fuel reduced the carbon emissions from the exhausts of ships, but led to the wholesale destruction of forests in Indonesia.

Dirk Kronemeijer, CEO of GoodFuels, said: "With carbon insetting, what really matters is whether carbon emissions were avoided as a direct result of each cargo owner's decisions. It's therefore critical that emissions reductions are measurable and verifiable. This is why GoodShipping relies on tested carbon accounting principles to ensure that any carbon emissions reductions are only claimed once, by the cargo owner who paid for the biofuel."

All GoodFuels' biofuels are certified by the International Sustainability & Carbon Certification (ISCC), a multi-stakeholder verification company that only certifies aviation and marine fuels produced from sustainable feedstocks, and that do not compete with food production or cause deforestation.

Moreover, the production of carbon-neutral methanol will only be contemplated by Maersk for example, for its vessels if that fuel is produced using energy from windfarms, the so-called power-to-x production process, rather than from the fossil fuel LNG.

GoodFuels and Maersk say they have been at pains to make sure customers paying the premium for carbon-neutral fuels are getting what they pay for. But it is not clear if other fuels are similarly accredited or if others offer independent oversight into sustainable fuels and how any checks can be effective.

Haris Zografakis, a partner at Stephenson Harwood and legal advisor to the Aspen Institute, which established the cargo owners' Zero Emission Vessel (coZEV) initiative, believes the best regulator for the system is the industry itself.

Zografakis said: "It will be decades until all ships and ports can offer decarbonised fuels, but by developing systems such as coZEV, major shippers can catalyse demand and therefore push the maritime industry to catalyse ship fuels."

According to him the system works better because "it's a demand-driven initiative", and he insisted: "Progress [on decarbonisation] won't come through regulatory pressure, but from pressure applied by consumers once they say 'I will pay extra for my green bread'."

He added that those in the maritime sector were keen to point out that shipping moves 90 per cent of all goods at some point, which means shipping has a share in 90 per cent of the carbon footprint of everything.

Zografakis agrees that these systems of catalysing demand and supply of biofuels have "no auditing standards" and/or regulatory oversight, but he argues that the private sector in the maritime industry is more effective in creating change than regulatory bodies.

Shipping, according to him, operates through a series of guidelines but ultimately, "I believe more in the power of contracts than regulation. We need a free market that self regulates", he said.

Not all customer-led initiatives are un-audited, however. The recent announcement by digital forwarder Forto, which has partnered with German carrier Hapag-Lloyd, offers shippers and forwarders the option of booking freight with a biofuel service in the same way as the GoodShipping and coZEV initiatives, using the mass balance principle to calculate emissions saved.

Johannes Saade, Forto's VP of seafreight products, said that its system was audited by class societies, but he conceded that the system could only work for full container loads.

"We are trying to convince customers to be part of the system and to pay for it, trying to educate them that it is worth it to use sustainable fuels," said Saade. "We are discussing how to deal with LCL cargo," he added.

Looking further ahead, Saade said there were physical limitations to biofuels.

"Only 5 per cent of global fuel used will be biofuels, there are physical boundaries in the supply," he explained, while the company must also now consider pre- and on-carriage via zero-carbon trucks.

Post-pandemic, supply chains are changing fast and freight forwarders need to be aware that there are no easy answers to climate change and costs will necessarily rise. But the solution for shippers is to make the transition to sustainable fuels short in order to bring down the costs of carbon-neutral fuels quicker.

Insights IN

Multinationals – comment by Alex Lennane

Schenker, sell-offs and sizeable forwarders

THE sale of Germany's DB Schenker has long been rumoured – but the government has now agreed it can be sold off, and split from ailing parent Deutsche Bahn.

It's been a long and frustrating road for the forwarder, who has been forced to sit by and watch rivals such as DSV take ever greater, acquisitive steps, hungrily eating up the likes of Panalpina and Agility on its relentless path to growth. DB Schenker, meanwhile, had no power to make similar moves.

And perhaps more humiliating still, it has spent the past two years less able to enjoy its surging profits and revenues, but instead propping up the dignity of Deutsche Bahn, whose rail business was heavily affected by Covid lockdowns. In 2021, for example, Deutsche Bahn made a loss of €911 million, on revenues of €47 billion. Schenker accounted for about half of the revenues. While long-distance passenger rail made a loss of €1.4 billion, Schenker's operating profit was €1.8 billion.

So despite record returns, DB Schenker has had to wait quietly, watching its newly fattened rivals run further and faster.

But now, there could be a future for the forwarder in the top tier – although Schenker is already the fourth-largest sea freight forwarder, and the third largest in air freight by volume.

But the gap between those at the top and the next tier is widening, as DSV eats its prey, Kuehne + Nagel snaps up add-on businesses and DHL in all its forms remains a sizeable beast. Their respective acquisitions of Agility, Apex and JF Hillebrand has made this gap in multinational forwarders wider than ever. According to one senior forwarder, the "size of network and scale is revealing a clear distance between the top three and the next group. It has an impact on both procurement and customers."

The question is, however, who buys Schenker. Schenker itself would no doubt prefer a standalone future – or rather, it would prefer to acquire, than be acquired by a rival. Any idea that DSV would come in for a big bite of the Schenker cherry would be much frowned upon in the Essen boardroom – and no doubt across Germany, which is hardly likely to want to assist the Danish in their bid for to become the largest multinational.

> "Maximising asset utilisation is a very different strategy to being a trader"

And DSV's ruthless brand removal and integration (see Panalpina) would not be welcomed – aside from the fact that the two business models are quite different.

Perhaps Kuehne + Nagel, whose main shareholder Klaus-Michal Kuehne has controlling stakes in Germany's Hapag-Lloyd, and now has a large shareholding in Lufthansa (upped to 17 per cent this month) may be a more attractive partner to the Germans.

And then, of course, there is DHL, which already has a sizeable forwarding business, perhaps putting regulators off the deal.

So that leaves a public listing or private equity investor. Or, as was the case with Ceva, perhaps a shipping line.

UBS noted this year that "three of the largest ocean carriers (MSC, Maersk and CMA CGM), which control around 45 per cent of the market, have recently acquired, and are looking to acquire, logistics capabilities and air cargo assets.

"They have also improved digital capabilities and have changed contract structures for freight forwarders... In light of the recent ocean carriers' moves, we believe the need to consolidate is stronger than ever."

Maersk and CMA CGM could be contenders – but at the moment the market is full of warnings that vertical consolidations could fail through lack of experience – and the challenges in merging asset-heavy and asset-light businesses.

"Maximising asset utilisation is a very different strategy to being a trader, it's a very different culture," said one forwarding executive.

That leaves an IPO as a preferred outcome, according to one knowledgeable source, which would give the German company autonomy over jobs, M&A and expansion. It is likely both DB Schenker's – said to be valued at between €12 billion and €20 billion – and its ultimate government shareholder's preferred option. But in the meantime, others are sharpening their pencils to work on potential deals.

FMC mulls forcing ports and carriers to communiate with import service providers

CAN improved data flow from container lines and terminals mend an uncompetitive and unreliable ocean cargo supply chain? If the US Federal Maritime Commission (FMC) concludes that this is the case, it could heap pressure on ocean carriers and terminals to step up their communication with landside stakeholders.

Importers, forwarders and drayage providers want the agency to mandate carriers and terminals to share more accurate and timely information on the status of cargo on the water and at the docks.

The recent slowdown in imports has not brought relief for importers waiting to get their containers off the docks, often coupled with detention and demurrage charges.

"Even as we see improvement in rates and sailing schedules, unloading and retrieval of containers is still a problem," reported Bob Imbriani, executive vice-president international of Team Worldwide. "We've had delays of over a week sometimes."

If containers are not moved off the docks in a timely manner, some boxes may end up being buried under containers unloaded from a ship that came in later, which can result in massive delays in retrieving them, noted Paul Brashier, vice-president drayage and intermodal at ITS Logistics.

He added that the problems are most pronounced at the port of New York & New Jersey at the moment – a result of congestion due to the fact that many importers shifted their flows out of Asia from California to East Coast ports to avoid congestion and delays on the West Coast.

Vessel congestion at the port complex of Los Angeles and Long Beach had shrunk to less than 10 container ships waiting for berth space there at the end of August, whereas East Coast gateways were seeing large numbers of ships waiting to get unloaded. There were 41 vessels waiting for berth space at Savannah at the time.

The FMC is currently inviting comments from affected parties – importers, forwarders, trucking and rail companies – on the problem and the role of data flow from the quayside. Under the Ocean Shipping Reform Act of 2022, which was signed into law in June, the government agency has to determine whether the port congestion is "of a magnitude such that there exists a substantial, adverse effect on the competitiveness and reliability of the international ocean transportation supply system".

If this is the case, it could issue an emergency order for carriers and terminals to share cargo availability information in a more accurate and timely manner.

Comments filed by drayage firms suggest that improved flow of information would make a difference. The Association of Bi-State Motor Carriers wants container lines to make information available 48 hours in advance on how many containers are on the final day before accruing demurrage charges, which would give terminal operators a clearer picture of the likely volume of moves on a given day. In addition, the association is seeking more detailed information on container space availability, particularly for the return of empty boxes.

> "We've had delays of over a week sometimes"

Terminals that operate an appointment system should be required to provide information on the number of available slots for the different types of move, by time slot and ocean carrier. They should also have to notify importers and carriers when appointment slots are fully booked or quotas for the return of empty units are full.

Some input to the FMC stresses that the delays are costing operators money and some have resulted in lost business. Imbriani pointed out that the longer dwell times of containers at ports increases the danger of pilferage and damage to cargo.

PAUL BRASHIER
ITS Logistics

Some information from operators is no longer relevant. "You get a message that your container has arrived, but if you go two days later to pick it up, it's not available," Imbriani said.

Brashier remarked that pre-Covid data flows are no longer adequate. "In the past you needed only a couple of days' visibility. These days are gone. Now you need weeks," he said.

ITS draws on a variety of data sources and leverages artificial intelligence to form a picture of box availability and congestion.

"You have to aggregate data," said Brashier. One source may be off, so aggregating this information with data from other sources helps companies arrive at a more realistic picture, he explained.

It is not immediately clear how far container lines and terminals can speed up their data flow, considering how long the industry has been working on shipment visibility, nor is it clear how far this can bring down congestion.

Imbriani thinks improved information flow would be a positive first step in the right direction. In its own submission to the FMC, Team Worldwide wrote that better data would be good, but that the real problem lies in the availability of manpower and equipment, from dock workers to chassis and empty boxes.

Some folks simply hope that the anticipated slowdown in cargo volumes in the months ahead will end the congestion, but this may be some time off. Brashier pointed out that the rail system has been clogged up too, holding back large numbers of containers at the West Coast ports. When these are released, the railways will struggle again, which will take some time to clear up.

He thinks that all affected parties should work together to find solutions, noting that "there's some significant infrastructure that needs to be put in place".

"My biggest concern is things stabilise and discussions will stop, we go back to the status quo and not learn the lessons from the past two years," he said.

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