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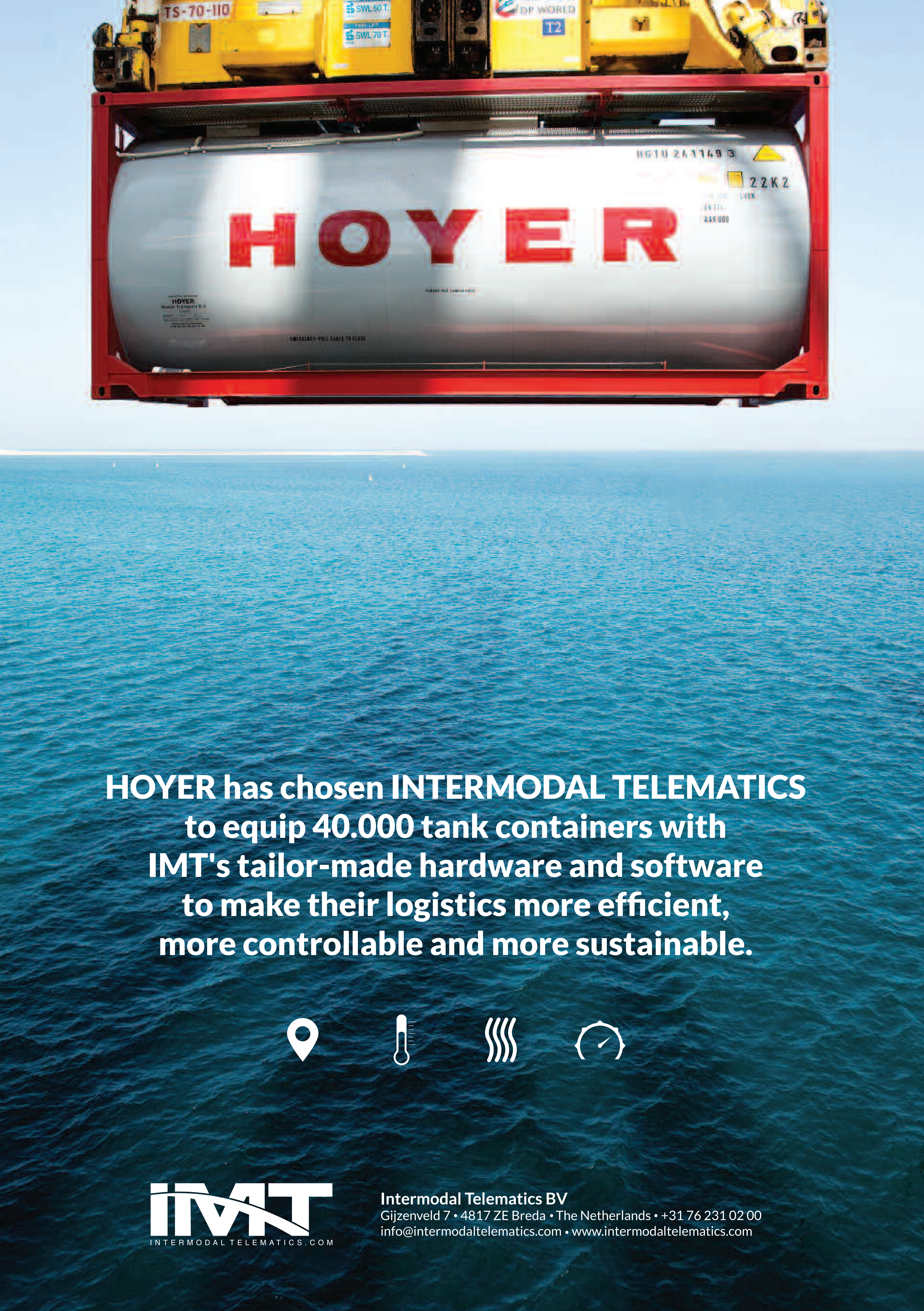
Tankcontainer MAGAZINE
Volume 4 | Issue 4 | December 2017

How tank container operator M&S Logistics leverages its people and its African roots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Out of Africa

Tank containers are a bit like manure – they are not much use unless they are spread around and put to work. Manure, of course, improves the richness of soil whereas tank containers, when put to use, should help improve the 'richness' of companies. Their contribution to lowering the cost of moving small lot size intermodal bulk parcels of dangerous chemicals – combined with their excellent safety record – sets them apart from drum and chemical parcel tanker alternatives. The undoubted economic and safety benefits of tank containers are not, however, available throughout regions such as Africa where the necessary tank container infrastructure is patchy.

This issue of *Tankcontainer Magazine* focuses on Africa, where chemical production is smaller scale in global terms, making it dependent on extended supply chains from Europe and the Middle East. Its potential export markets for consumer and bulk products are often similarly distant.

But Africa has a discrete range of tank container opportunities for those with knowledge of the local market in what is a high growth but highly competitive and occasionally volatile region. Petrochemical majors increasingly use Africa as a useful supplementary market to their intensely competitive mainstream markets in Asia and Europe, and as a developing market in its own right.

West Africa requires tank containers for a range of oil and gas applications. These opportunities are captured, to a degree, by US and Brazilian producers. East Africa is often targeted by South Korean, Indian and – increasingly – Chinese product in tank containers. North African tank container business focuses on the Algerian fertiliser sector.

South Africa's chemicals sector is the largest in Africa with the major export destinations being the US, Germany and China, but much of it still relies on imported raw materials. Many export cargoes derive from South Africa's coal-related industries. Tank container usage centres on the synthetic fuels, refining, fertiliser and chemicals sectors where players include Sasol, Foskor, AECI, Protea Chemicals, Engen, PetroSA, Sapref, SynChem and Dow Sentrachem.

South Africa is also, of course, home to Welfit Oddy which, along with Singamas and Nantong Tank Containers, makes up the second tier in the world ranking of tank container manufacturers.

Co-polymer, specialty chemical and hydrocarbon tank container cargoes are also used as raw materials by Africa's polymer producers. These include Sasol and Safripol in South Africa and Eleme in Nigeria while substantial new production will start up at Egypt's ETHYDCO and Oriental Petrochemicals.

Relatively short delivery times and lower freight costs often make the chemical supply chain from Europe and the Middle East more cost competitive than sourcing from Asia or the Americas. We explore both the European and Middle East supply chains and consider the role that tank containers play.

European producers usually supply Africa directly, using tank container operators such as M&S Logistics – with its 8,000-strong fleet – while Middle East suppliers include SABIC and Tasnee in Saudi Arabia, and Muntajat in Qatar. All are looking to broaden their sales footprint as a hedge against a slowdown in their cornerstone market, China.

We also explore how the dynamics of the Middle East tank container affects the East Africa market and provide a recap of the Middle East tank container market, placing it in the context of its supply chain contribution to Africa. Jebel Ali, Dubai and Red Sea locations such as Yanbu are natural origination points for African-bound tank container cargoes such as 70% sodium lauryl ether sulphate, 96% linear alkyl benzene sulphonic acid and alpha olefin sulphonate.

Distributors are widely used in Africa by chemical majors as a way of providing the much sought-after but elusive 'customer intimacy', and as a means to consolidate cargoes. Consolidation of the distributors themselves helps create the critical mass to make the use of tank container operations more viable. We cite Brenntag – the world's largest chemical distributor – as an example. Four separate companies are being combined into one: Brenntag South Africa.

Africa is, of course, not without its risks and has some unique challenges. These include default, currency devaluation, an underdeveloped infrastructure and payment difficulties, but many sub-Saharan countries are able to compete with emerging markets in other regions in terms of per capita income, GDP growth rates, credit ratings and ease of doing business.

We also look at Cape Town-based Swift Engineering (a specialist manufacturer of stainless steel flanges, manlids and inspection covers), Egytrans Depot Solutions (the first Egyptian company to provide international-standard cleaning, storage and M&R services), Savvy and US-based Needa Technologies (which has developed DepotMan, a depot software package).

Leslie McCune, Editor

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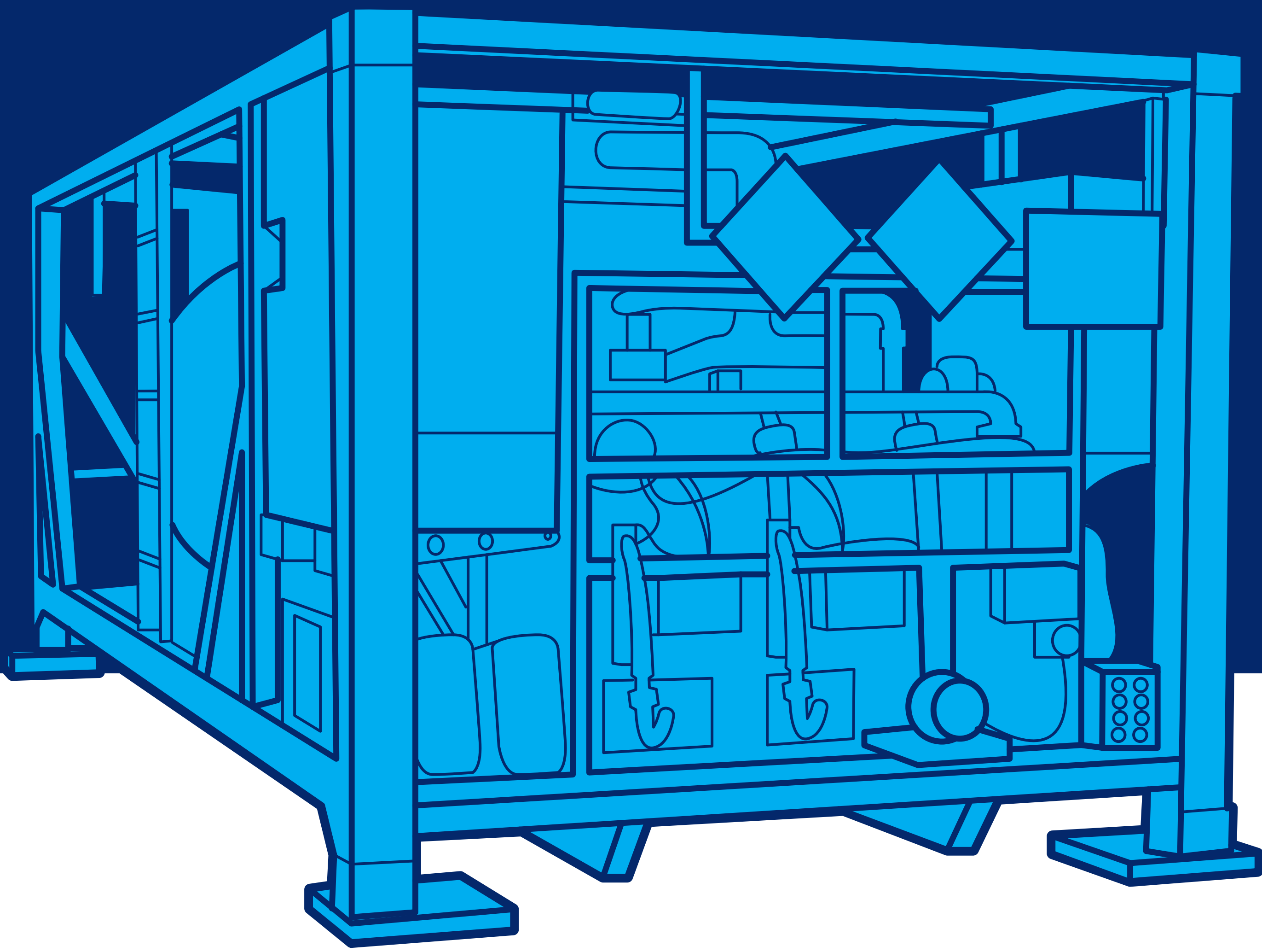

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New services for tank containers in Hamburg

Two Hamburg tank container experts have developed a new comprehensive service package.

The Hamburger Container-und Chassis-Reparatur Gesellschaft (HCCR) and container service provider CONDACO are combining their expertise and years of experience to offer all aspects of cleaning, repair and storage of tank containers to the depot at Altenwerder Damm.

The service can be booked through either partner.

"Right from the start, we want to attract customers who are looking for high-quality services for their tank containers at competitive prices. We offer them a logistically excellent location and the associated opportunity to reduce costs," says Dr. Georg Böttner, Managing Director of HCCR.

Thorsten Dantz, general manager of CONDACO, explains: "We're excited to present this extremely competitive offer to our customers."

The partnership stipulates that the HHLA subsidiary HCCR will concentrate on cleaning, handling and transporting the tank containers.

The tank cleaning station at Altenwerder Damm has all the necessary technical qualifications and certifications at its disposal.

The HCCR specialists take care to provide a high-quality cleaning service in compliance with all applicable regulations, while also considering the delivery and receipt of containers via truck or train.

There is a direct connection to the HHLA Container Terminal Burchardkai (CTB), which has extensive handling and storage capacity for full and empty tank containers.

CONDACO, a specialist with many years of experience, will handle the repair of tank

containers. Modifications and other special orders can also be carried out.

The depot at the Waltershof part of the port (Altenwerder Damm) has further logistical advantages in addition to its connection to Hamburg's largest container terminal CTB.

It is located directly at the Walterhof motorway exit onto the A7 and has a rail connection that is capable of serving an entire block train.

The storage and repair of containers of all types belongs to the core business of HCCR.

For more than 30 years, CONDACO has offered all t ypes of services for tank containers in many regions of the world.

WEW expands integrated logistics services

WEW has launched expanded services for the support and refurbishment of tank container systems at its newly updated and expanded Weitefeld facility in Germany.

These services include deployed field service, support and upgrade options, full refurbishment, and spare parts supply for both military and civil customers.

WEW's tank container systems are in use with military, chemical and logistics customers worldwide, transporting storing and delivering gas and liquids across global supply chains. Their high reliability and serviceability ensure that they can continue to withstand the rigors of multi-modal transport and storage in extremely harsh environmental conditions throughout their decades-long lifecycle.

Based on the know-how of an experienced and reputed producer, the service process begins with a visual and functional survey carried out by ultrasonic scan, X-Ray, vacuum and pressure tests, or other inspections as required.

Work includes repair of damage to structural elements, such as head frames, longitudinal rails, tank-body, and attachment parts. Sealings are replaced as required, wear and tear checks are carried out on all components, and hydraulic and/or electric equipment is checked and repaired, including integrated heating/cooling equipment, valve control, pumps, electronic devices and power generators. The tanks are then typically pressure-tested and repainted if required.

Repaired, upgraded and refurbished units are tested and certified before their return to the customer.

Depending on the work carried out servicing can extend a tank's usability by 30 months or five years; extensive refurbishment can extend the unit's life by a further ten to 20 years.

WEW has worked with a number of military customers on tank servicing and refurbishment including the US Army and German Bundeswehr. Orders range from a single unit in need of repair, a series of units, or orders placed under multi-annual framework contracts.

Stolt Nielsen posts third-quarter results

Stolt-Nielsen has posted a net profit in the third quarter of the year of $18.5m, with revenue of $513.8m, compared with a net profit of $15.6m, with revenue of $500.8m, in Q2 2017.

Stolt Tank Containers reported an operating profit of $14.8m, up from $13.7m, driven in part by improved margins and higher equity income from STC's joint venture cleaning and repair depots.

Stolt Tankers reported an operating profit of $34.4m, up from $27.6m, mainly reflecting the impact of gains related to the company's bunker hedging programme.

Stolthaven Terminals reported an operating profit of $16m in the third quarter, essentially unchanged from the previous quarter.

CEO, Niels G. Stolt-Nielsen said the tank container business "continued to show evidence of margin improvement, along with lower empty repositioning costs and improved contributions from joint-venture depots.

"On balance, our overall outlook remains unchanged. We do not anticipate any substantial improvement in the chemical tanker market until the latter part of 2018, when the current orderbook will have been significantly reduced and the balance between tonnage supply and demand improves.

"For Stolthaven Terminals, we continue to expect a modest but steady improvement in results, driven by actions to enhance operational performance across our network of terminals. At Stolt Tanker Containers, we expect margins and utilisation to hold steady at current levels."

HOYER and H&S launch joint-venture

HOYER Group and H&S Group are setting up a joint venture to respond to market demand for consolidation, optimisation and automation in the bulk liquid foodstuff transport sector.

The H&S Group is acquiring 51% of the shares of HOYER's German Foodlog activities, the liquid foodstuff division of the HOYER Group. The existing Foodlog activities of HOYER in Germany will be converted into a joint venture between HOYER and H&S, which will be known as H&H Foodlog GmbH as of the beginning of November this year.

The enhanced service portfolio is expected to lead to operational benefits for customers. Together, H&S Foodtrans and H&H Foodlog will be ranked among the top three leading operators in the European bulk liquid foodstuff transport market. The new liquid food operation has up to 350 employees, 1,600 specialised bulk tank containers, 175 road tankers, 200 trucks and an expected annual turnover of about €175m.

Adwin Verhoeks, formerly Business Unit Manager for H&S Foodtrans in the Netherlands, has been appointed General Manager of H&H Foodlog. The company will be based in Neuss, Germany. H&S Foodtrans as well as HOYER's Foodlog division will continue to operate from existing offices outside of Germany.

Chief Executive Officer of HOYER Group, Ortwin Nast said: "Our aim is to provide the best possible service to our customers. This means high standards as well as comprehensive coverage. The step to join forces will support this target."

Chief Executive Officer of H&S Group, Ubbo Hempenius said: "We are very pleased with this joint venture. H&H Foodlog enormously increases our effectiveness, and therefore enables us to be the logistics partner for our large European customers."

Multimillion investments by petrochemical giants

The Total refinery and its logistics partner SEA-Invest are together investing €100 million in a big capacity expansion in the port of Antwerp.

The chemical giant Evonik for its part has selected the port as the ideal location to boost the market growth of pyrogenic silica.

Meanwhile ATPC has just broken the first ground for an LNG/ ethane tank farm.

Together, the various investments will help to assure the long-term presence of these big chemical and petrochemical operators in Antwerp.

Totseanergy, the new joint venture by Total oil company (through its trading arm, Totsa) and the SEA-Invest group (through its tank storage division SEA-Tank) is to invest €100 million in the new Totseanergy Terminal at the head of the Hansa dock and the 6th Harbour dock.

The investment comprises eight new tanks with a capacity of 20,000 cu metres each, three additional loading and unloading bays and a pipeline between the terminal and the Total refinery.

Antwerp Port Authority has undertaken to increase the depth alongside quay to 15.5 metres.

Since 2010 SEA-Tank has already invested €250 million in constructing a tank storage farm of 860,000 cu metres for Total and its trading division, Totsa Total Oil.

This additional investment will give Total a combined capacity of more than 100 million cu metres in the course of 2019.

Total has been operating in the port of Antwerp since 1951. In more recent years together with SEA-Invest it has played a significant role in doubling the volume of liquid bulk handled by the port.

The current investment will give the refinery greater flexibility and enable it to operate more

efficiently. The new tanks will take up around a quarter of the space available in the terminal, leaving plenty of room for further expansion.

This choice by Total and SEA-Invest once more confirms the strategic position of Antwerp as a petrochemical hotspot, demonstrating the strong belief by industrial and logistics operators in the value of having a long-term presence in the port.

Evonik, for its part, has announced that it is to invest tens of millions of euros in expanding its production capacity for special silica.

The chemical concern has chosen its Antwerp site for the expansion "because of its central location and the modern port facilities," according to spokesman Danny Erreweyaert.

With this investment Evonik is cementing its position as the world's largest supplier of silica, used as an ingredient in paints and lacquers, modern adhesive systems, transparent silicones and fire-resistant, high-grade insulation materials.

"With the expansion of our capacity in Antwerp we seek to drive the market growth for pyrogenic silica in Europe and other important export markets," says Johannes Ohmer, member of the management committee of Evonik Resource Efficiency GmbH.

With 10 production units and more than 1,000 employees Evonik Antwerp is one of the largest Evonik sites in the world.

Recently ATPC (Antwerp Terminal and Processing Company) broke the first ground for construction of an LPG/ethane tank storage farm of 30,000 cu metres.

The tanks are specially designed for storing ethane, propane, butane and derived products.

The construction of this new facility will make ATPC a significant player in the ARA (Antwerp-Rotterdam-Amsterdam) storage market for LPG and ethane.

Furthermore, ATPC is able to handle VLGCs (very large gas carriers), at its terminal in the port of Antwerp.

ATPC expects to have the full capacity in operation by the middle of 2018.


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World's largest LNG tank could contain energy revolution

A Finnish startup has built 'the world's largest' LNG tank — and it could contain an energy revolution

Finnish Startup LNGtainer announced last month it has inked a deal with a Norwegian company for an international project, for which they intend to buy 200 of the Finnish firm's LNG containers.

With a list price of €140,000 per container, this makes the deal worth close to €30 million.

Liquefied natural gas' (LNG) is natural gas that has been converted into liquid form. It's cooled to -162°C, making it non-flammable and also shrinking it (by volume) some 600 times.

This makes it much easier to transport LNG around the world than, for example, building a pipeline. It's much safer than other methods, and it produces 25% less CO2 than traditional fossil fuels. As a major source of energy, LNG has been around since the 60's

Considering that "LNG demand is set to grow at twice the rate of gas demand, at 4 to 5% a year between 2015 and 2030," according to Shell LNG Outlook, figuring out a more cost-efficient and scalable transport system is no doubt a massive opportunity.

LNGtainer's big departure is that it uses the existing cargo ship infrastructure, as opposed to relying on separate – and more expensive – high-pressure containers that are commong among its competitors.

The Helsinki-based company has been researching and developing their containers for several years, and are now bringing them to the market.

"Our containers have 15% more volume - in other words every seventh cargo transport is free of charge, and they also utilise 30% less equipment by weight, compared to normal gas shipping containers", explains Tom Sommardal, LNGTainer's CEO.

Sommardal, a maritime industry veteran, founded LNGtainer in 2011 to stop the waste he had seen in oil and liquefied natural gas (LNG) transport

Six years later, his six man-team has built what LNGtainer says is "the world's largest" LNG tank that fits inside a 40 ft. cargo container. The patented tank also houses a series of innovations Sommardal hopes will help transform the industry.

"Our containers use less insulation for maintaining internal temperature, and require less energy to prepare the liquid gas for use".

What enables the new tank container's advanced design, Sommardal explains, is the fact that "the insulation has been moved from the outside of the cryogenic tanks to the inside."

This increase in volume, reduction in weight, and the all important internal insulation give LNGtainer's tanks a holding time of 60 days. In practice this means liquefied natural gas can be transported to parts of the world that have, up until now, been quite impossible to access.Going forward the company plans to build on its partnership with the (undisclosed) Norwegian company, to serve even more people, across increasing remote parts of the globe.

LNGTainer is also working with several other companies, developing similar projects in various other locations.

The mass production of LNGTainer's new tanks will begin next spring in Loviisa, Finland. The company's target is to produce one tank per day, and around 200 per year.

Jordan Co invests in Odyssey Logistics

Odyssey Logistics & Technology Corporation, a leading global logistics provider, announced today that an affiliate of The Jordan Company has signed a definitive agreement to become the new majority shareholder.

The transaction is expected to close in the third quarter, subject to customary closing conditions, and will result in the buyout of all shares currently held by the venture capital firms who initially invested to help launch the company. There will be no change in Odyssey's management, core strategy or mission. Terms of the transaction were not disclosed.

"With The Jordan Company, Odyssey will continue its path of strategic growth, both organically and through acquisitions," said Bob Shellman, President and CEO, Odyssey. "This transaction

underscores our consistent focus on providing broader service offerings, a larger transportation network and advanced technology to enhance our global supply chain capabilities."

"The Jordan Company targets partnerships with established and profitable companies like Odyssey," said Brian Higgins, Senior Partner, The Jordan Company. "We are excited to partner with Odyssey's leadership team and to support their vision for continued growth through investment in services and technologies for their customers."

"We look forward to partnering with The Jordan Company as their financial investments and experience in the end markets that Odyssey serves are of significant value to the company as we continue to invest in and deliver specialized logistics solutions to our customers," said Cosmo Alberico, Chief Operating Officer and CFO, Odyssey.

Odyssey develops targeted, comprehensive logistics services that address the unique challenges, systems, products and visions of companies worldwide.

Double celebration for Leschaco

Leschaco Pte Ltd (Singapore) celebrated a quarter of a century of business with almost 130 invited guests in Singapore, wlecomed by Leschaco Group owner Jörg Conrad (right).

Leschaco oriented itself towards Asia in the late 1980s. In the first few years the group cooperated with Birkart, but in 1992 Leschaco decided to become independent and established its own subsidiary in Singapore.

Over the years, Leschaco Singapore expanded its activities steadily. The company and has a staff of 45.

Leschaco Singapore set up individual logistics solutions, considering specific customer requirements for the logistical planning, storage and distribution, handling of dangerous goods, and shipping. Tank container operations, the storage and transport of dangerous goods, cross-border transports to Malaysia and Thailand as well as customs clearing and documentation management are the daily business.

Leschaco Singapore has for some years now also been the location of "the extended arm" of the Tokyo-based Leschaco Tank Container Competence Center, which is responsible for the APAC region. Furthermore, the company operates domestic SILO container transports for granulate and powder products and manages a Regional Distribution Center for several customers.

Just a week after Leschaco Singapore celebrated its 25th anniversary the company's China arm has celebrated 10 years of company history with an event in Shanghai, again led by Jörg Conrad, who welcomed 100 guests.

Over the past 10 years Leschaco China has grown to become an established and reputable company with an additional eight offices in Hong Kong, Nanjing, Qingdao, Tianjin, Ningbo, Dalian, Shenzhen and Beijing.

The company is active in all product areas of the Leschaco Group and has a staff of 95. With its head office in Shanghai, Leschaco China has established itself as a reliable logistics service provider and as a NVOCC at one of the busiest ports worldwide.

The company combines the services of a lead logistics provider with tank container operations and classical shipping – local to global – offering a wide range of services.

Crestline Investors funds GEM growth

Crestline Investors, an institutional alternative asset manager, is set to fund the accelerated growth of GEM Containers, a tank container leasing and management business based in London.

GEM will use the facility to scale up its leased tank container portfolio, providing high-quality equipment and services to its logistics and industrial customers globally.

CEO of GEM, Heidi Sommerville said: "Together we have formulated a flexible capital solution to fit our growth plans. Crestline's investment enables us to further accelerate our growth and focus on delivering high-quality assets and services to our customers."

GEM was established in 2012 as a tank container management and leasing business, with a current fleet close to 2000 units. GEM provides a range of tank container specifications for lease in the international shipping, logistics and manufacturing industries.

Tankwell opens new facility

Last week Tankwell tank containers, officially opened their new premises to which the company has moved last summer. The new facility enables the young company to increase their production and to enhance the efficiency of the manufacturing process.

Guests from the food and chemical industry, transportation and leasing companies were offered an interesting program to illustrate the properties and manufacturing of the lightweight tank containers.

Experts from the logistics and composite community put the development of the Tankwell innovation into their specific perspective.

A tour presented the attendees with a good insight into the innovative production processes.

Also new developments in the portfolio were announced:

The anti static composite tank container - suitable for products with a flashpoint below 60°C - is currently available and the lightweight ISO tank container is planned for Q2/2018.

Space-saving stacking from LTH Logistics

LTH Logistics has developed an alternative stacker of tank containers it claims is a space-saving and sustainable alternative to conventional reach stackers.

The company's semi-automatic, PLC-regulated crane system can be remotely operated from a control room using cameras and sensors to accurately position the tanks.

The system controls lifting, positioning, stacking, retrieval and loading of ISO tank containers.

LTH Logistics, General Manager, Don Tang said: "With the supplier's anti-sway technology on the positioning of tank and human control, using touchscreen LCD, loading and unloading is much easier, safer and efficient for our customers. The system knows when to lower the hook at normal speeds, and when to slow the process for precision lowering and lifting.

"With automated positioning and locking, it won't operate until everything is in place and secure. The machine knows when to operate, and if the lift is not safe and secure, it won't work."

Albatross spreads its wings with new tanks

As part of the expansion of its newbuild fleet, ALBATROSS recently placed an order for 140 high-pressure gas tanks with working pressure of 27.5 resp. 34.5 bar, from CIMC Nantong.

The interior of the tanks is zinc lined to avoid shell corrosion and product contamination. The tanks are manufactured with a sump, enabling complete discharge of the cargo.

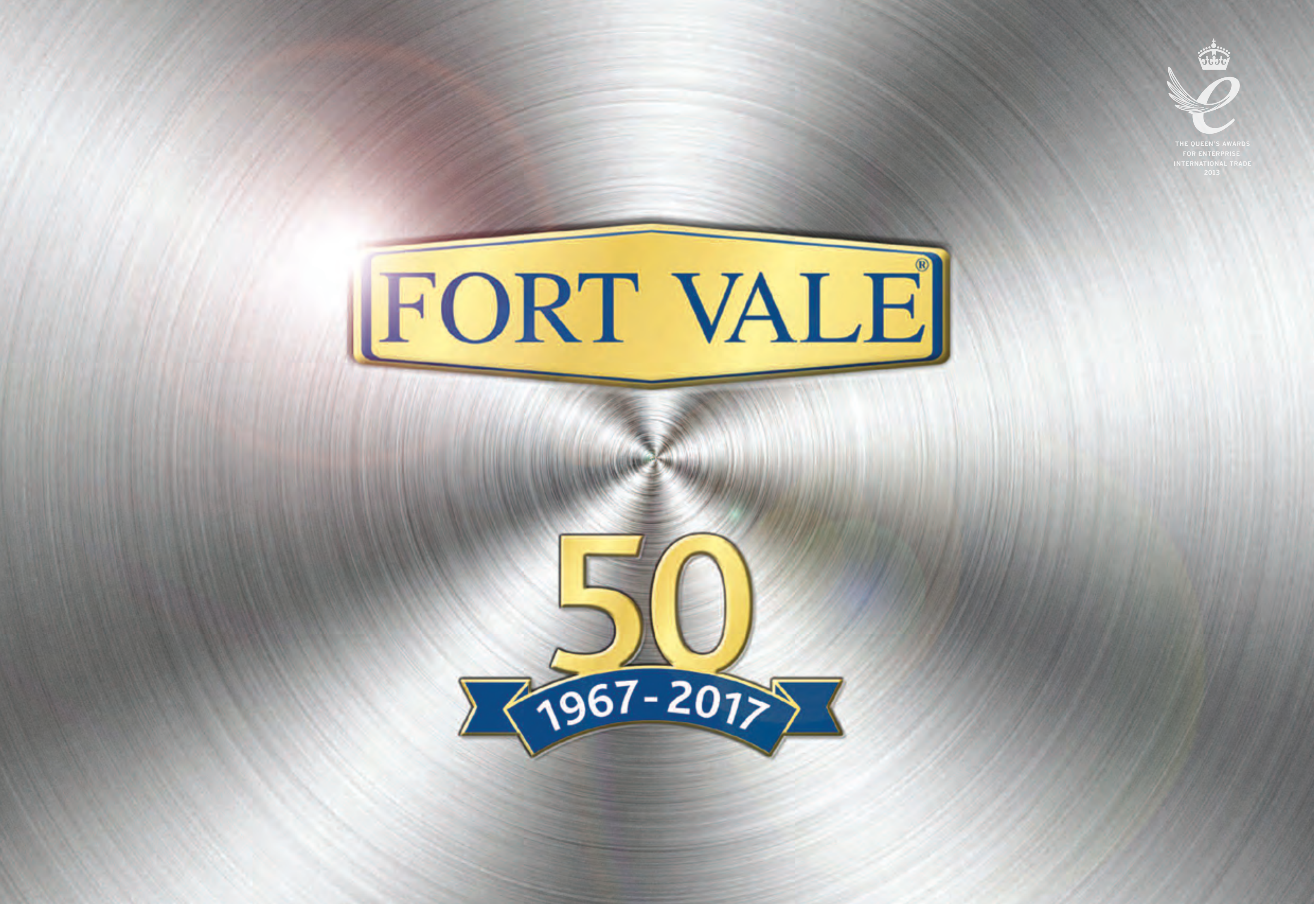
A spray bar is installed in all tanks, which allows better mixing of different products when tanks are being used for blending.

A special device has been fitted to the frame allowing easy and safe installation of the ALBATROSS Sky GPS device, not only to show the actual location of the tank, but also supplying data showing the logistic performance of the tanks.

Meanwhile, ALBATROSS has started working with Houston-based Slay Transport.

The company says the combination of location, service and market knowledge is the next step in its global service strategy.

The first tailor-made tanks have arrived in Houston as part of a fleet exchange project .



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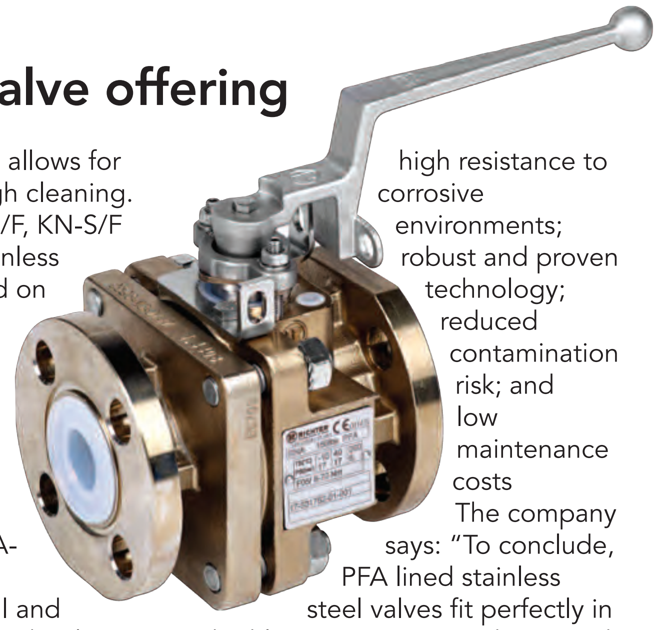
50 YEARS 1967-2017

Richter extends stainless steel valve offering



Richter Chemie-Technik GmbH, a global leader in PFA lined pump and valve solutions, is expanding introducing its ball- and diaphragm valves with stainless steel body.

It starts with the production plant and ends with the final product which eventually will enter the human body. Hence, cleanliness throughout the production process is extremely important.

Typical painted cast iron valves will release paint chips which can enter the piping system with periodic maintenance procedures. Potential paint residues in the medium can be avoided by using high grade stainless steel (1.4408) eliminating the need to paint or coat the body to prevent corrosion.

Stainless steel valves allows for fast, easy and thorough cleaning.

The new series MV-S/F, KN-S/F and KNA-S/F with stainless steel bodies are based on valves which are well established in the chemical industry and have been continuously optimised for more than 30 years.

The KN-S/F and KNA-S/F valves feature Richter's Labyrinth seal and ENVIPACK stem seal technology, which adds to the total concept of a robust design combined with great performance.

The bodies are made of precision cast stainless steel and available up to a size of DN 80.

Key features of the new valves: high resistance to corrosive environments; robust and proven technology; reduced contamination risk; and low maintenance costs

The company says: "To conclude, PFA lined stainless steel valves fit perfectly in highly corrosive atmospheres and clean-room environments.

"Richter's stainless steel valve series minimise the risk of contamination in the final product and contribute to a safe and reliable production process.

Welfit for CS Leasing

CS Leasing has added a number of new Welfit Oddy Light Weight 35,000 litre SWAP tanks to its fleet.

The tanks benefit operators in a number of ways including: lower tare mass and fewer top openings. The Lower Tare Mass allows the operator to transport greater product volumes for the same transport overall cost.

As an illustration, the Welfit 35 000 litre tank with the 70% baffle is 600 kg lighter than its competitors. For a 36-on gross mass transport limit this equates to an additional 2% product being transported at no extra cost.

The second major saving is from the Reduced Number of Top Openings this is due to the cleaning pattern of the aerofoil baffle which saves on one cleaning port per SWAP. The most common gasket is the braided PTFE gasket which is replaced on each trip. The cost saving on one cleaning port gasket per trip.

Saso goes for a smarter system with aJour ATEX telematics

ASTO Telematics GmbH has received a major contract to equip new tankers and tank containers for ethylene oxide transports from Sasol Germany.

Sasol is part of the chemicals' division of Sasol Ltd, a South African integrated energy and chemicals group and one of the world's largest manufacturers of synthetic fuels.

Sasol's freight wagons operating in the German and European rail network will be equipped with the new aJour ATEX Compact + Sensor Telematics. The aJour telematics systems, smart batteries and sensors are supplied with Sasol with ATEX certificate EX Protection zone 1.

The new aJour ATEX telematics units from ASTO Telematics enable Sasol to evaluate the following events: circulation, temperature, impact and quality monitoring. In the event of danger, an automated status transmission of the car and of the loaded substance is sent to the appropriate facilities in order to ensure targeted intervention and to avoid damage and costs.

First Bertschi subsidiary celebrates 40 years

The first Bertschi subsidiary, Bertschi Transport GmbH Cologne, has celebrated its 40th anniversary.

Founded in 1977as Bertschi Transport GmbH Düsseldorf, the company opened an operating facility in the recently built intermodal terminal 'Köln-Eiffeltor' and procured German trucks for the pre- and on carriage.

Since then the branch has grown steadily, carrying out feeder traffic for the combined transport between road and rail. Today more than 150 employees and 70 trucks execute 25,000 transport orders per year.

A terminal for handling and storage of containers, a tank cleaning station as well as a truck repair facility are at the site.

Bayer chooses HOYER for smart technology

Bayer's Crop Science division has chosen the Hamburg-based HOYER Group to supply all its containers worldwide with smart technology.

HOYER has already been using its smart technology for Bayer in Dormagen since 2016, where tracking and alerting had proved itself successful. It served to gather experience for the international Connected Container project and it reassured Bayer of its decision to choose Hoyer.

Production Planning & Execution at Bayer, Thomas Dieckmann said: "We appreciate HOYER as a reliable partner who provides smart technology for our Connected Container project enabling the integration of ERP data into the global container network. As an international pilot we will be implementing HOYER's technology onto our fleet in Kansas City next. This will be the first step towards the realisation of our global information and alert system."

HOYER has worked in partnership with Intermodal Telematics (IMT) to develop hardware and software.

With its smart logistics system HOYER enables seamless monitoring of goods transported in tank containers at any defined point in time for customers.

This includes not only monitoring position but also the status of the transported goods with regard to their pressure, temperature, density parameters and filling level.

American PetroLog in domestic ISO tanks

American PetroLog LLC has announced an investment in a fleet of domestic ISO tank containers that can provide a cost effective transportation and storage solution to agricultural and chemical manufacturers and distributors.

Chief Relationship Officer Robert Kellner said: "With the continued growth in the North American chemical industry and the diminishing availability of tanker trucks, our ISO tanks provide a much needed capacity solution to our customers having predictable and consistent shipping lanes."

American PetroLog is focused on solving the complex supply chain challenges of customers. Service offerings include nationwide logistics services, supply chain management, and dedicated trucking fleets.

In brief

SO Tank Cleaning Terminal has formally opened its third tank depot in Thailand. The new facility, in Sriracha, responds to growing demand for tank cleaning, repair, refurbishment, off-hiring and storage of tank containers in the country. SO currently operates depots in Bangplee and Laem Chabang.

Den Hartogh's Latin America division has been presented with the Solvay Excellence Supplier Award for Maritime Logistics Services. Solvay's Brazilian operation, which goes under the Rhodia name, is the largest tank container exporter in the port of Santos. "The award is recognition of our efforts and provides motivation for our team in Rio, says Jean Felipe Albuquerque, Den Hartogh's general manager for Latin America.

The European Petrochemical Association has announced that its 2018 Annual Meeting, its 52nd, will take place in Vienna from 7 to 10 October. EPCA has decided to move the meeting by one day, with the opening event now taking place on the Monday evening, followed by business sessions on Tuesday and Wednesday.

Russian intermodal container and logistics operator PJSC TransContainer is creating a new company called ChemicalTC to operate its tank container business. The board has also approved an increase of the share capital of the subsidiary by up to Rb613m as well as through a transfer of tank containers owned by TransContainer.

Africa's at the heart of M&S Logistics

Editor Leslie McCune hears how tank container operator M&S Logistics leverages its people and uniquely African roots

LM: What is the company background of M&S Logistics?
M&S: M&S Logistics is a global logistics provider of bulk liquid transport, specialising in the use of ISO intermodal tank containers. The company was founded by David Jenkins in South Africa in 1996 and is part of the Multistar group of companies.

LM: What assets and services does M&S Logistics offer?
M&S: The company has a fleet of over 8,000 tank containers offering mainly deep-sea logistics services for bulk liquids. We efficiently and safely manage shipments on a door-to-door or pier-to-pier basis.

LM: What is M&S Logistics' global coverage?
M&S: We have offices in the US, Europe, South Africa, Singapore, Dubai in the UAE and China. We also have partnerships which regularly service Russia, Turkey, India, Saudi Arabia, Qatar, Malaysia, Thailand, Indonesia, Philippines, Taiwan, Korea, New Zealand, Australia, Japan, Argentina and Brazil.

LM: ...and its coverage in Africa?
M&S: Our African coverage includes Mauritania, Ghana, Nigeria, Angola, South Africa, Mozambique, Tanzania, Kenya, Uganda, Egypt, Tunisia, Algeria and Morocco

M&S is the only tank container operator committed to Africa with a fully ISO and CDI audited office on the continent. Being of African origin, we understand the continent and have been fully committed to it over the last 21 years.

We have Broad-Based Black Economic Empowerment (B-BBEE) compliance without "window dressing" it (B-BBEE is a government policy to advance economic transformation and enhance the economic participation of black people in the South African economy).

LM: What sets M&S Logistics apart?
M&S: Our people are fundamental to all we do. They are the heart of our business and our most important and most valued asset. Our values, behaviours and approach to our business are summed up in our M&S company statement: "We believe in creating mutually-beneficial relationships and adding value to every person or organisation that works with us."

We have highly motivated, knowledgeable and experienced people, offering a personalised professional service and have identified that part of the market that is still willing to pay for reliability, commitment and this high level of service.

In addition, we have continually invested in new tank containers and the technology to underpin our growth strategy. This continual investment in our business ensures that we can meet the requirements of our rapidly growing customer base, while our short management chain allows us to fast-track decisions which could impact on a customer's business if not dealt with promptly.

Our management team has many years of experience in global transportation and is supported by our highly skilled employees. All are extremely dedicated and have the specialist knowledge to successfully operate within the complex worldwide procedures and legislation surrounding the transport of bulk liquids.

LM: How has M&S Logistics fared since 1996?
M&S: M&S Logistics has been included in the London Stock Exchange's "1,000 Companies to Inspire Britain" twice in the last five years – most recently in 2015 – and has been chosen as one of the "34 Most Exciting Companies to watch" from the list.

To be included in the list – which celebrates the UK's fastest-growing and most dynamic small and medium-sized businesses – companies need to show consistent revenue growth over a minimum of three years, significantly outperforming their industry peers.

In 1996, M&S Logistics' tank container fleet was mostly owned by investors. The operational fleet comprised a few hundred tank containers. By the beginning of 2017, however, the fleet had grown to 8,000 tank containers, all of which are operated by M&S, which is majority-owned by the Multistar group.

LM: What sort of products do you regularly carry?
M&S: 44% of the products we carry in our tank containers are hazardous goods involving Classes 3, 5.1, 6.1, 8 and 9. The remainder of the products carried are non-hazardous.

LM: Which asset-management tools do you use?
M&S: Two years ago we implemented Real Asset Management's Monitor system.

LM: How is the business split between chemicals and food? Is there any gas involvement?
M&S: M&S is involved in gas movements but only on a project-specific basis. Overall, 90% of our business involves the transport of chemicals in tank containers, with the remaining 10% focused on food grade.

LM: How is the fleet split between tank types?
M&S: We have a deepsea tank container fleet of standard 24,000 litre and 25,000 litre tank containers. We also operate around 1,000 baffle tank containers and have a small specialised fleet of smaller capacity units.

LM: Which manufacturers supply the fleet, and how do you decide from whom to buy?
M&S: Our tank container fleet is mostly supplied by Port Elizabeth-based Welfit Oddy and Nantong-based CIMC.

The decision of from whom we choose to purchase is based on trust. When making the decision, the questions we ask ourselves are: "Which tank container manufacturers do we trust to give us the levels of service we expect when dealing with them? Which manufacturers have the necessary quality systems and culture in place? Which manufacturers have the technical capability? Which manufacturers have the after-sales service? Which do we trust to stand by their products? "

After this assessment, it then becomes a matter of location and price.

LM: Are older M&S Logistics' tank containers remanufactured?
M&S: Years ago we were very active in remanufacturing old tanks containers but, given the current global over-stock of tank containers, we prefer to scrap our old units.

LM: How has the market changed since M&S Logistics was established?
M&S: The biggest changes have been in Europe, where the region has gone from being a net exporter of chemicals to being a net importer, and in China, where the market continues to grow.

The past 20 years have also seen a meaningful improvement in safety standards in parts of Africa, Asia, the Middle East and the Americas. However, there is still a lot of work to be done in driving acceptable standards in developing markets.

The tank container market has become a lot more competitive and we are seeing a push by a few of the large chemical producers to move away from the contracted norms of our industry. Instead, they are trying to place their liability and risk on the tank container operators.

LM: How are customer preferences changing?
M&S: Our targeted customer base is looking more and more for commitment, reliability and service. While there is still a lot of pressure on rates, we are finding chemical producers and some chemical traders are focusing more on reliability of supply, the communication and transparency of extra costs and high levels of service, which the larger tank container operators struggle to maintain.

LM: What is the biggest challenge in the global tank container market?
M&S: As with the general purpose box container industry, the tank container industry is sitting with an over-stock situation where new tank containers have been built, not because of market growth or the demands from shippers, but due to outside factors.

M&S Logistics is a privately owned global tank container operator and is led by Managing Director David Kew. The company has extensive tank container business interests with Africa and is headquartered in Sandbach in the UK.

The chemical industry has had an average year-on-year global growth of between 3% and 5%, while the global tank container fleet has grown by 9% to 12%. As the general life span of a tank container is in excess of 20 years, we do not see this oversupply rectifying itself for quite some time.

LM: What is M&S Logistics' view of the International Tank Container Organisation (ITCO)?
M&S: The Multistar group is a founding member of ITCO and believes our industry needs a voice that stands up for our best interests. We believe ITCO, with the right leadership and the right level of involvement from the industry, can provide this, be it improving safety standards, training (such as the ITCO E-Learning programme), solving common technical or regulatory challenges, or the promotion of tank containers over other modes of transport.

LM: What next for M&S Logistics?
M&S: We believe there is still room to grow in the niche markets we've carved out for ourselves.

While we do not see the need for more standard tank containers in an already flooded market, we will be building more tank containers for the more specialised markets that we serve.

Geographically, we will also be focusing more on the Latin American markets, where we see room for growth, and where we will be opening our own office next year.

We'll continue to actively recruit the best people our industry has to offer and to invest in their wellbeing and success, as we believe this is fundamental to our growth and success. To support that initiative, we are planning specific recruitment drives in our key markets early in 2018 to provide the resources for the planned growth.

Out of Africa...

It has a supply chain that extends to Europe and the Middle East. We explore the role of tank containers

At the macro level, supply chains are lengthening, not least because the main source of petrochemical demand growth is Asia and the main source of supply growth is the US.

Extended supply chains are obviously good news for tank container demand, as the longer the route, the more are required. But macro-trends need careful analysis to reveal the implications for tank container demand.

Petrochemical supply growth in North America, for example, reflects increased ethane availability from shale, but ethane-based crackers produce products that create little demand for tank containers. The recent recovery in crude oil prices only increases the competitive advantage of these gas-based feedstocks.

Africa's long supply chain

Due to the absence of any sizeable petrochemical production, Africa has always depended on lengthy supply chains and is used by petrochemical majors as a useful alternative to their intensely competitive mainstream markets in Asia and Europe, and as a developing market in its own right.

Chemical distributors are also focusing on Africa's growth potential and, as they consolidate and bulk up their operations, offer more opportunities for tank containers. Global leader Brenntag, with 2016 sales of $11.1bn, has, for example, consolidated its previously separate operating companies of Lionheart, Warren Chem Specialties, Plastichem and Multilube into a newly-established entity, Brenntag South Africa.

The level of laden tank container exports from South Africa is, of course, partly driven by the export of wine in tank containers from Welfit Oddy, the world's second-largest manufacturer.

Exporting wine to Europe is a convenient revenue-generating first leg for newly manufactured tank containers, which can then join an operator's global chemical fleet.

Welfit Oddy manufactured 6,300 tank containers in 2016. The reduced output reflected its increased emphasis on higher-value specialised tanks, which often enables it to achieve a price premium over Asian manufacturers whose success has been based on manufacturing generic T11s.

African markets are often supplied from Europe or by Middle East players, which focus on the growing East African market. East Africa is developing the crucial tank container infrastructure necessary to leverage the undoubted safety and economic benefits of tank containers.

Sadara, the recently completed $20bn joint venture between Saudi Aramco and Dow Chemical in Jubail, Saudi Arabia, is the world's largest petrochemical project and markets its production directly to the so-called Middle East Zone, and via a PMLA (product market and lifting agreement) through Dow to the rest of the world.

A platform to supply

Dow will use Sadara as a platform to supply South Africa via Durban. Its other primary hubs for containerised cargo are Australia (Melbourne, Sydney), Belgium (Antwerp), China (Dongguan, Guangzhou, Huangpu, Shanghai, Tianjin, Zhangjiangang), India (Bangalore, Gurgaon, Kanchipuram, Kandla, Panoli, Panvel), Indonesia (Jakarta), Italy (Nola), Japan (Nagoya), South

Korea (Ulsan, Yeosu), Malaysia (Westport), Poland (Kutno), Russia (Moscow), Singapore, Spain (Tarragona), Taiwan (Kaohsiung, Taoyuan), Thailand (Bangkok, Map Ta Phut), Turkey (Gebze) and the UAE (Dubai).

Many Middle East petrochemical producers use tank containers to supply the African market so a brief recap may be useful.

Ten years ago, significant developments were occurring in the Middle East – particularly in Saudi Arabia – that would fundamentally change the global dynamics of polymer and downstream liquid chemical production and distribution. Capacity increases in gas-based cracking drove polymer production growth but, as gas feedstock availability became limited, feedstocks moved towards naphtha which, in turn, provided the raw materials for local liquid speciality chemical production.

The implications

There were two logistics implications: increases in bulk liquid exports in chemical product and parcel tankers; and increases in tank container exports.

In 2007, Al Jabr Talke was already developing a strong position in polymer logistics, but had no position in liquids. Had there been a dominant – or clearly emerging – liquid logistics player in 2011/12, some liquid logistics investment decisions taken at the time may have been considered less viable.

The prospect of Sadara's tank container business had profound implications for liquid chemical logistics in Saudi Arabia, namely the availability of tank containers for export; tank cleaning capacity; fit-for-purpose warehousing for packed liquid chemicals and drumming capacity for local and export markets.

Overlaying these potential pinch points were the safety standards in some off-site logistics operations.

The prospect of Sadara's tank container business had profound implications for liquid chemical logistics in Saudi Arabia

Fast-forward to 2013 and little had changed. Some tank container operators moved away from using agents and established joint ventures with local partners. Tank container margins were still good, both in and out of the kingdom, and tank container stocks broadly matched demand.

The clarification of Sadara's tank container demand made logistics operators think seriously about what investments and assets were needed to support the increased volumes.

Proximity to Jubail, one of the world's largest petrochemical clusters, was highly desirable but land allocation was controlled by the Royal Commission for Jubail. The commission designated the logistics area in Q3 2014, after which logistics operators started applying to secure individual plots.

The award of the first four blocks was made in August 2015 and each company began its construction plans. Meanwhile, in anticipation of increased activity, tank container stocks started to rise. This had two fundamental implications, firstly, operators wanted to position tank containers into Saudi Arabia so inbound margins were deliberately reduced to secure inbound traffic, which was then used to service export demand. Secondly, export margins also came under pressure as tank container stocks rose as the increase in exports failed to materialise due to the delay in Sadara's start-up.

With stocks increasing and margins shrinking, operators competed aggressively for what export business there was. Some deliberately reduced tank container imports into Saudi Arabia. Others built up stocks, believing that the ultimate prize would be worth the short-to-medium-term pain.

A third strategy was to reposition empty tank containers out of Saudi to nearby markets such as East Africa and India. This inevitably led to rates collapsing in these markets, depressed margins and the stifling of investment in Africa's critically important tank container infrastructure.

Freight forwarders then entered the tank container market, together with traders offering volume campaign shipments on wafer thin margins for the tank operator. Cargoes were typically used cooking oil, monoethylene glycol and tail end distillates.

A small sub-set of this group failed to accept their areas of responsibility in some tank container operators' standard terms and conditions. Poor commercial practice included the non-payment of main freight invoices, walking away from impounded tanks in African destinations and Saudi despatch ports, accepting no responsibility for tank container staining and shell damage and non-payment of destination charges to which they were contractually obligated.

Smuggling skews the market

The discovery of a smuggling operation in 2015 then skewed the tank container market. Large volumes of diesel fuel were mixed with bitumen in Saudi Arabia, exported in tank containers to Bahrain and then re-exported to Hamriya and Fujairah in the UAE. The diesel fuel was then separated out of the mixture and exported to India, where the price of diesel was ten times that of Saudi Arabia.

As a result, the movement of refined petroleum products (RPP) in tank containers effectively ground to a halt because every tank container carrying RPP then had to be inspected before being granted an export licence by Saudi Aramco. All exported tank containers were subject to lengthy sampling procedures (as opposed to the previous procedure of a small sample from each bill of lading).

The long licence-approval process prevented hundreds of tank containers from being loaded. Those destined to move RPP were made available to petrochemical customers instead, creating a huge surplus.

The backlog of tank containers waiting for sampling in Saudi ports grew quickly, exacerbating the long-standing congestion and bureaucratic problems afflicting Saudi ports. Some tank container customers refused to pay for pre-shipment detention, despite it being part of their liability in the commercial agreement.

Meanwhile, plans have been developed by the tank container operators who received land allocations. These are said to include a Bertschi/Al Drees rail-connected facility, a major Hoyer/Petrochem Middle East drumming/blending facility in Jubail and a Den Hartogh/ Crescent Transportation depot.

Suttons Arabia logistics investment ambitions in Saudi Arabia have been dramatically downscaled

Suttons Arabia logistics investment ambitions in Saudi Arabia have been dramatically downscaled due to unexpected cash calls from IS Logistics Group in Singapore, which it acquired in 2014.

Genuinely unique

Among the many plans, the only genuinely unique piece of infrastructure is a cleaning facility that also accepts rail tank cars (although, with successive delays to the Saudi Landbridge and GCC rail network, the timing of the requirement is unclear).

Another obvious differentiator is a tank container depot offering maintenance and repairs to ITCO's Acceptable Container Condition guidelines, thereby offering an on-hire and off-hire location for leasing companies in the region's biggest market.

In the medium term, there will inevitably be an oversupply of cleaning capacity in Saudi Arabia's Eastern Province, which was projected to double from 23,000 washes a year in March 2016 to March 2017 (although any delay to some more sophisticated facilities pushes this back).

Others, such as Al Muhaidib, have entered Eastern Province's tank cleaning market with simpler facilities, while Innova in Sharjah, UAE, with a fleet of over 2,200 T11s, has started in-house operations and are cleaning 350 units a month, including those of third parties. A move by Innova to Dubai makes sense.

Those operators which maintained a supply of inbound tank containers will be best positioned to service outbound work as export volumes increase, which they will inevitably do. This could provide a base load for cleaning station investments. Short term, tank container operators can therefore expect lower cleaning costs as additional capacity becomes available.

Construction delays

Logistics planning has been made more difficult by the perennial construction delays at Middle East petrochemical sites, making clarity on the needs for off-site logistics services and infrastructure difficult.

However, the largest contributor to the additional logistics capacity and infrastructure coming on stream simultaneously in Saudi has been the land allocation process. After being awarded land at the same time, operators then planned to offer similar logistics services.

Discounted prices may be used to attract early throughput and some will rue the day they decided to invest, at least until the next step change in specialty chemical output …. but with the Middle East cash-strapped and losing its competitive advantage in petrochemicals, when will that be?

In the future, it is clear that larger numbers of tank containers carrying specialty chemicals from the Middle East will follow the flow of polymers to Africa.

Tailored Swift

Cape Town manufacturer of stainless steel ancillaries Swift Engineering is growing, thanks to its focus on quality and specialism, reports Debbie Owen

According to Swift Engineering General Manager Garth Peterson: "Growth has been particularly strong over the past three years due to an intensified focus on serving the market, particularly tank container, road tank manufacturers and end users in Europe, China, South Africa and the US. The weaker rand has also helped."

Swift Engineering now produces over 400 stainless steel manhole assemblies for tank containers a month, and has more than 30,000 units in circulation globally

Peterson says: "Supporting this growth, we have opened a sales office and warehouse close to the port of Rotterdam, in the Netherlands, invested in modern production processes and strengthened our marketing efforts by exhibiting at key trade shows such as Transport Logistic in Munich, Germany."

The company's growing reputation for being able to produce products to international specifications and to deliver them in an average of five to six weeks (including shipping) has played a key role in driving sales.

Growth has been partly-driven by the company's focus on the after-sales market. Says Peterson: "Having our warehouse near a major port has given our European customers quick access to stock and replacement parts such as lids and swingbolts. Our intention is to expand the warehouse in the years to come, which will allow us to even better serve the European market."

Europe may be a dominant and important market but so is South Africa, the company's home ground.

One important company is Worcester-based road tank manufacturer GRW Engineering.

Swift's success in serving both GRW Engineering (featured in a previous issue of *TankContainer Magazine*) and the road tank industry has encouraged Swift to increase its presence in this sector, and in the USA in particular, where it has partnered with Girard Equipment.

More growth brewing

Swift is also hoping to expand its product range to serve South Africa's fast growing micro-brewery, distillery and artisanal wine industries. The company has been quick to see the potential of this niche in the beverage market.

"The increase in the number of micro-breweries and distilleries, as well as the emergence of boutique wineries, has definitely increased demand for specialised equipment.

"Because South African artisanal producers tend to prefer international equipment to the products available on the local market, we see the potential to begin manufacturing European products – which are currently imported at huge cost – under licence.

"We have the quality steel, the know-how, the processes and the potential to produce the exact product here in South Africa …. but at a lower cost.

All things considered, the potential to grow in this 'artisanal beverage' market, especially with

the current weak rand/euro exchange rate, is significant."

Peterson is optimistic that 2018 will be another year of steady growth for Swift. "The market has stabilised since the downturn in 2009/2010 and we continue to gain market share as more end-users request our products because of their quality, the quick turnaround and price.

"We are also fortunate to have a wonderful shipping agent and access to an efficient shipping service, so the distance between production and end market is seldom an issue. Expanding our warehouse in Rotterdam will, of course, increase the accessibility to our products and spares," says Peterson.

China is fast becoming an important market for Swift and exports to the country continue to increase. Other potential markets include South America and Australasia while Europe continues to hold further potential, especially in the food and beverage sectors.

The tank container market accounts for approximately 60% of production, with the road tanker market accounting for 30%. Local

South African industry - such as the food and beverage industry and general machinery sectors - make up the remainder.

A Swift look back in time

Established in 1951 to manufacture products for the heavy transport industry, Swift Engineering changed focus in the late 1990s when, in conjunction with the South African Tank Container Association (SATCA), it developed and manufactured a stainless steel manhole assembly for tank containers.

The first prototypes were built in 1999 and were displayed at exhibitions, where tank container manufacturers and end users expressed significant interest, proving to be the launch pad for growth.

Further growth came when the Eugene Dos Santos purchased Swift in 2002 and relocated the company from Johannesburg to Cape Town.

Since then, Swift has invested millions of rand in sophisticated plant and equipment. Its extensive service range includes the capability to use the CNC plasma-cutting of stainless steel and aluminium up to 75mm thick with computerised nesting to ensure the optimal use of material, electro-polishing of stainless steel components up to 1000mm x 1000mm x 300mm, plate rolling and MIG, TIG and ARC welding (including high-speed, precision robotic welding cells).

The company is also experimenting with a number of 3D printing options, especially to produce working parts, as the technology has the potential to offer considerable cost benefits in the long run.

Swift Engineering's current product range includes manways, flanges and accessories.

Growth brewing in South Africa's craft industry

While economic growth has been slow in South Africa, craft industries – particularly micro-breweries, micro-distilleries and artisanal wines – have boomed.

Standard Bank estimates the South African craft beer market grew 30% in 2015, 35% in 2016 and could make up to 18 million litres in 2017.

The value of craft beer sales is expected to double between 2016 and 2017 to R1 billion due to changing consumer tastes. A growing number of younger South Africans are moving away from the mass-produced beers that have dominated the local beer market for over 100 years.

Between 2013 and 2015, South Africa went from 50 breweries to over 200 and the trend continues, with micro-breweries popping up all over.

Local crafter Darling Brew reportedly invested R52m in a new brewery to meet local demand and investors believe there is massive scope for growth because of the relatively small investment required.

Craft breweries are expected to produce as much as 18m litres this year. That would give it a 2.1% share of the total premium and light market of about 790 million litres. This, according to Standard Bank, is up from 0.3% in 2011.

Following in craft beer footsteps are artisanal spirits, led by gin. Several micro gin distilleries have opened, each innovating to push flavour boundaries.

Inverroche, based in the Western Cape seaside village of Stillbaai, produces three gins flavoured with Cape 'fynbos', the unique biome which stretches along the coast, home to over 9,000 plant species that grow there and nowhere else on earth.

Other micro-distillers use wild rosemary, buchu, spekboom, rosehips and rosewater for a unique local spin. The growth in craft gin producers in South Africa has given the industry credibility and traction and produced a genre of products that South African can be extremely proud of.

EDS: the pioneer

James Graham reports on Egytrans Depot Solutions, which pioneered intermodal transport equipment services in Egypt

Less than a decade ago, Egypt was poorly served by commercial organisations that could offer neutral third-party ISO tank container cleaning and repair operations. While companies might offer one or the other of these tasks, no one company offered both to container operators or leasers.

This gap in the market was a drag on tank container operators bringing equipment to the country for discharge and filling.

The market responded in due course with the establishment of Egytrans Depot Solutions (EDS), the first company in Egypt to provide such services to its tank container industry. Today, customers from Middle East and Asian markets can also take advantage of these services.

EDS is wholly owned by Egytrans, a provider of integrated global transport services and solutions in Egypt for 40 years, which combines state-of-the-art European know-how and technology. It established its first depot in Alexandria and plans to build and operate a network of depots in Egypt.

The establishment of EDS, in 2010, came as the region became a major player in petrochemicals production. At the same time, growing movements of bulk liquid were bringing containers which required cleaning and repair after discharge. With this increase in movements by Europe-, Asia- and North America-based operators and leasing companies, it became clear that there was a need to meet this demand.

However, seven years ago the region lacked a substantial network of tank cleaning and repair stations. While there were a reasonable number of tank wash stations, few were equipped with the necessary equipment to handle ISO tank containers, lacking lift trucks and chassis.

Preferred partner

The company's ambition is to be the preferred partner for depot services for bulk liquid intermodal transport equipment in Egypt by building and operating a network of state-of-the-art depots in the country.

From its location at Km 25 Alexandria-Cairo Desert Road, Alexandria, depot manager Abdelrahman Gamil is in charge of a site that is core to EDS's service offering. The depot has double-digit staff numbers, including container technicians, back office staff and security personnel. According to Gamil, attracting suitably trained and qualified professional staff to EDS has not been a problem.

The site's area is 13,500sq metres, with a 3,000sq metre storage yard suitable for hazardous and flammable products, which are kept in a safe and controlled environment that undergoes regular audits. The yard is equipped with lifting equipment to ensure the safe handling and storing of tank containers, and has a capacity of 400 units.

However, this is not the limit to the site's potential, notes Gamil. He says: "Around 5,000sq metres are available for an extension."

Gamil outlines the range of cleaning services that EDS offers. He says: "We clean tank containers, tank trucks, IBCs for chemicals and food stuffs."

He expands that cleaning uses an automated cleaning system involving rotor jets providing 100 bars pressure and dryer. It uses steam, hot water and detergents.

There are three wash bays for

tank containers and one bay for tank trucks is available.

Cleaning operations are conducted and planned via computerised systems, which make use of the reference chemicals data base. Cleaning is performed using the appropriate chemicals, high-pressure hot water and high-temperature steam jets. Cleaning by steam is one of EDS's area of specialisation. It is a multi-purpose appliance, mess-free and environmentally friendly.

EDS is licensed to clean a wide variety of hazardous and non-hazardous materials. Clients are supplied with a cleaning certificate for each tank EDS cleans at its facilities in compliance with international standards.

At a client's request, EDS can discharge any remaining product residue inside the tank container after discharge into IBC storage. This allows the client to safely and economically store the liquid until it can be safely delivered to its consignees. An IBC cleaning head is available at the depot.

EDS has secured an agreement with the Alexandria Governorate environmental authorities for waste disposal and operators are assured of the disposal of cleaning effluent through environmentally friendly methods in compliance with international codes.

Turnaround times

Clients look to return their containers to revenue earning as quickly as possible and Gamil explains that EDS seeks to minimise this down-time.

He says: "It takes one or two hours to clean a tank container, depending on the kind of residues inside the tank."

On repair and maintenance of tank containers, Gamil says: "We can produce cladding patches, repair or change valves, change gaskets, undertake pressure tests and repair or change walkways."

Customers who require repairs and maintenance are not simply domestic operators.

"Customers come from all over the world and we work with most tank container operators."

Tracing its roots

While EDS has a relatively short history, its parent's story neatly mirrors that of Egypt over the last 70 years. The Egyptian Transport and Commercial Services Company was established in December 1973 under Egypt's open door policy with regard to private enterprises. However, it traces its roots back to 1939 as a continuation of Gamal El Din Leheta & Co.

Egytrans was nationalised in 1964 when it was one of the biggest companies in Egypt, offering shipping agency, tourism agency and other transport services. It has an annual turnover of $10.9m.

Since its founding, the group has grown into a leader in the transport field in Egypt with 350 employees and eight branches in strategic locations close to the country's main ports, airports and transport centres.

As well as EDS, the parent group also has interests in a joint venture with Wilhelmsen Group and a barge company that provides inland water transport on the Nile using licensed barges, sea transport within Egyptian territorial waters and land transport for all types of cargo.

The business environment in Egypt is not for the faint-hearted. According to the World Bank, the Egyptian government started implementing bold and transformational reforms in 2014, aimed at spurring the economy, enhancing the business environment and staging a balanced and inclusive growth.

The first wave of reform focused on rebalancing the macro-economic aspects of the economy, which included difficult policy choices that were adopted simultaneously, such as the VAT law, reducing energy subsides, containing the high growth of the wage bill and the liberation of the Egyptian pound.

The second wave of reforms targeted improved governance and investment climate, which included the Civil Service Reform Law, passed in October 2016 and which included reforms targeting the removal of investment barriers and improving the attractiveness of local and foreign investments.

Keeping your cool

Remote monitoring and control of cargo temperatures is a basic customer expectation, reports Wendy Pascoe

Much work has been done in recent years on tools which can help keep cargoes in a stable condition as weather conditions become more extreme. This poses new challenges to the structural integrity of tank containers and to their cargoes. As a result, real-time monitoring and temperature control are increasingly important.

Intelligent (or 'smart') tank containers are now playing their part in increasingly digitised supply chains. It is now possible to monitor and remotely control product temperatures in real-time, and to provide a flow of accurate data from start to finish.

Savvy Telematic Systems AG, based at Schaffhausen, Switzerland, offers its customers remotely-controlled temperature adjustments from any location at any time, simply by using a smartphone. Shipments can be automatically and precisely pre-heated or cooled.

A record is maintained of when and how long the tank container was pre-heated, and the temperature at which it was put into operation, so it makes client billing easier and more transparent. Users receive alerts of any temperature deviation and are only two clicks away from taking action. It all means, ultimately, reduced costs, because controlled temperatures maintain optimum quality and lead to fewer uncontrolled events.

Worldwide, a number of companies specialising in chemical or food products use Savvy's technology.

"We have equipped our tank containers with the SAVVY® FleetTrac," says David Wang, Sales Director of Nantong-based CIMC, the world's largest tank container manufacturer. "Thanks to the technology, uninterrupted digital temperature protocols are not the only thing we are getting. The sophisticated alarm, diagnosis and control options offered by the cloud-based SAVVY® Synergy Portal enables unprecedented real-time management for temperature-controlled shipments.

"For sensitive liquid chemicals, the temperature monitoring equipment is important but the integrated device will also monitor GPS, pressure, liquid level and so on."

Critical cooling

A typical cargo carried in one of CIMC's tank containers is MDI, which requires specific conditions of temperature – from the chemical plant to the end user's plant – in a range of no greater than 2°C. Wang says: "With our monitoring equipment, we can see the temperature data and, when the temperature is close to a critical value, we can re-start the heating/cooling system by remote control to keep the temperature in the correct range."

He adds: "Not all our tanks are equipped with these telematics devices but we see a considerable growth as more tank users are requesting it. As an example, one of our customers - a logistics company - asks truck drivers to take photos of the thermometer on the tank container and send them back every two hours to make sure the temperature is within the correct range. Now they only need to use their cell phone, login to our portal to get the temperature data in real time."

CIMC and Savvy are exclusive partners. CIMC has developed www.tankmiles.com with Savvy and they share customer support.

Aida Kaeser, CEO of Savvy, says: "Our customers benefit because they get intelligent tank containers from CIMC that are already equipped with the technology. This way they save both installation time and money because someone has already done it for them."

The telematics units are robust and, thanks to their low power consumption, are also suitable for long-term autonomous operation. They are connected by interfaces to the container and tank wagon heating and/or cooling units.

Savvy's so-called 'intelligent interfaces' make it possible to use the technology with a broad range of manufacturing systems. SAVVY® telematics units are in operation in well-established heating and cooling systems such as Dirac, Eltherm, Löbbe and Klinge. During operations, the units record current temperatures and transmit them to the SAVVY® Synergy Portal. This enables both real-time monitoring and, later, proof of transit.

This sort of sophisticated data usage also comes with cost benefits. The portal provides extensive business intelligence functions to analyse the transport processes of chemical and transport companies, helping to utilise capacity more efficiently and improve asset management.

Baltica-Trans Logistics, a large logistics provider headquartered in St Petersburg, Russia offers transport services, including customs clearance, insurance, security, cargo storage, maintenance and in-transit quality monitoring. It operates worldwide although mostly between Russia, Europe, Asia and the Middle East/Africa. Temperatures in these regions vary between -50°C and +50°C.

The company mostly carries chemicals such as oils, polyols, TDI, hexanes, acrylates and aniline, as well as foodstuffs such as vinegar, spirits and glycerine. Some products, such as latex, juices, concentrates and palm oils, need to be kept within very

Aida Kaeser, CEO of Savvy

explicit temperature ranges. This is achieved by using so called "reefer" tank containers, which maintain temperatures between -20°C and +60°C.

Valentin Turtia is the head of Baltica-Trans Logistics' tank container division. "Mostly we carry liquids where temperature control during transit is not important – even in Russia with its cold temperatures – because cargoes don't lose their properties, even when frozen. We do, however, need to heat cargoes by steam to make them liquid again so they can be unloaded.

Getting overheated

"This is when temperature control becomes important because, if a cargo is overheated, it loses its properties in most cases. This is the reason why all of our tank containers have a steam heating pad and at least one thermometer."

Turtia says their clients expect temperature control. "To achieve that on our "reefer" tanks we install telematics systems which allow us to set the temperature of the cargo and to change the temperature settings during transportation if necessary."

As a logistics provider, Baltica-Trans needs to be able to shift cargo quickly, but this is not always possible. "From November to April, at least 25% of the cargo delivered in tank containers to Russia need to be heated at depots before going for delivery. This takes from four to 50 hours, which means waiting times have to be factored in when schedules are drawn up for transportation."

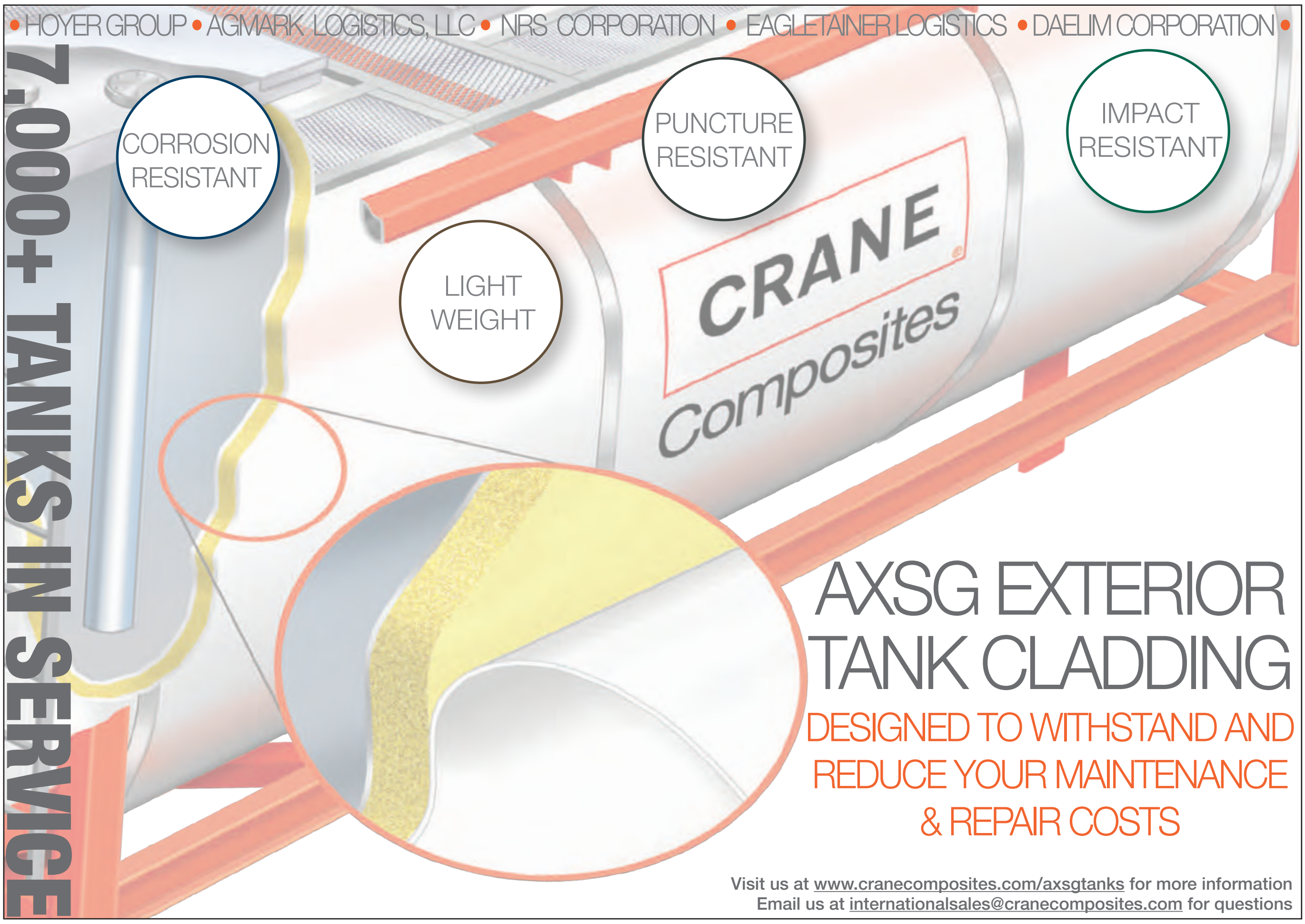
Turtia says all Baltica-Trans' 1,400 tank containers are temperature-controlled, not least because otherwise they would be unusable for half of the time.

"I can't say that it is expensive or not because all tank container operators have broadly equivalent costs for it and include these in the rates paid by customers. However, what is important is that costs to maintain the temperature controls have reduced in the last few years because of the developments in telematics systems."

Savvy's Kaeser spells out the obvious: unlimited data isn't always a good thing. "Active, continuous shipment monitoring, with transmissions every five minutes, is possible with our system but it does not make sense technically or economically.

"Our telematics systems are hybrids and equipped with self-learning software. Instead of continuously bombarding users with data, we notify them when there are deviations which are relevant. The software takes care of the rest because it is developed to automatically recognise certain patterns, learn from them, and adjust to them accordingly.

"We are proud of the self-learning capacity of our software which comes from long-standing experience in the development of highly complex algorithms. The advantage of digitisation is, after all, to automate data flows to free employees from mindless, repetitive tasks. Valuable time is then available for them to undertake more complex tasks that truly add value."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The Italian job

Partnering with Stolt Tank Containers and RMI, Marenzana aims to expand by diversification, reports Angelo Scorza

"On the opening day of our new joint venture, we would like to give special thanks to all those that made this possible," said Marenzana's Managing Director Alessandro Pais.

"We were supported by several parties - Stolt Tank Containers' Moerdijk depot manager Dennis Verduyn and their Singapore office, the design team at STA Italy, G.B. Costruzioni srl and equipment suppliers Groninger and Aaqua NV."

Alberto Marenzana, owner and chairman of Piedmontese-based Marenzana, also voiced his satisfaction for the opening of Vado Tank Cleaning srl, the joint venture between Marenzana and Stolt Tank Containers.

Stolt Tank Containers is the world's largest tank container operator, with its Italian office in Vado Ligure (Savona), while Marenzana specialises in the road haulage of liquid and inflammable cargoes. The province issued the environmental authorisation for a 2ha site in 2016 and, following an €11m construction, the depot is operating.

Tanks containers will be cleaned with hot water, washing products and pressurised steam obtained from a methane boiler and waste waters will be discharged into an internal treatment plant. Vapour emissions from the cleaning operations, together with fumes released by the methane boiler used to heat washing-water, are constantly kept under control.

Customers are typically road transport companies providing

services to local Vado Ligure industrial customers such as Infineum. The cleaning plant can carry out 20 cleans a day for 240 working days a year or up to 4,800 a year, with each clean consuming 2-3 cu meters of water.

Combining expertise

"With its strategic position in the north of Italy, our plant can take complete care of a chemical transportation companies' tank containers needs via the one-stop-shop concept," Marenzana says. "Stolt Tank Containers and Marenzana combine years of experience in a state-of-the-art depot inspired by Stolt Tank Containers' depot in Moerdijk in the Netherlands, which has been operating successfully for three years. Our depot not only offers high quality cleaning but also the possibility to heat tanks on a 24-hour basis".

Representing the second generation at the helm of the company, Alberto Marenzana (a member of the ECTA European Association Board) joined the company 35 years ago after completing his economics and law studies. He leads the company, with MD Pais, who joined the board in 2001.

Alberto's father, Armando F. Marenzana, started the transport business in 1959, following 11 years in the infrastructure business in Venezuela, where he built part of the trans-Amazonian highway.

From small beginnings

Like most Italian companies in this sector, it started as single-vehicle haulier and expanded due to the economic boom of that period. The company, which was based in Novi Ligure (Alessandria), had a turning point in the 1980s, when Marenzana's wife Ada Sterpi developed trading activities and acquired customers such as Montedison, Enichem, Roloil and Mira Lanza.

In 1984, their son Alberto joined the company. In 1994, it was


Alberto Marenzana and Alessandro Pais

chosen for the Cefic's SQAS pilot project and in 1997 it turned into a joint-stock company, opening branches abroad and established several partnerships, the most important of which was with RMI Global Logistic Services in Rotterdam. In 1999, it was one of the founders of the Brussels-based European Chemical Transport Association (ECTA).

Marenzana specialised in the transport of liquid bulk chemicals, both dangerous (ADR 3,5.1,6,8,9) and non-dangerous. Following its partnership with RMI more than 15 years ago, it became one of the European leaders in tank container intermodal transport on the Benelux-Italy route, as well as in liquid waste on the Italy-France route. It now has depots in Novara, Busto Arsizio, Le Havre, Rotterdam and Antwerp, as well as intermodal interchange hubs in Orbassano, Aiton, Grenoble and Lyon. Road traffic hubs are located in Marseille, Vado Ligure, Livorno, Mantova, Ferrara and Frosinone.

The company owns a fleet of 130 tractors, 260 road tanks and 1,500 tank containers (with RMI).

"We diversified our modality to provide both ordinary road and rail transport over long distances in Europe. We might also diversify into other related sectors such as industrial gases (oxygen, nitrogen, hydrogen etc...).

"We will definitely not deal with ordinary freight or straightforward container transport, nor with warehouse logistics".

How could a small-medium sized Italian enterprise establish a partnership with the giant that is Stolt Tank Containers? "Because we both have the same very important customer, with its production plant in Vado Ligure, we have always been partners.

"With our 24/7 loading structure inside the customer's perimeter, we managed their tank container cargoes, although they entrusted other companies with tractor units for loading.

"Four years ago, we and Stolt Tank Containers faced the same problem. We found a common development path and the plant we established in partnership was the solution. Today we are Stolt Tank Containers' major traction suppliers in Italy, and in Europe, in terms of volumes.

"There is no competition between us because Stolt Tank Containers deals only with maritime transport while we deal with road haulage.

"We want to grow. Despite our double-digit turnover growth in 2017, we still do not have the necessary critical mass to be as big a player as some. However, in Italy, we are leaders in a market divided between a fairly small number of medium-sized companies. We are one of the few entirely independent companies in Italy."

Transport assets

Pais observes that over the years the company managed to keep its activities stable, despite a 40% sales collapse in the difficult years of 2008-2009. The company outsources approximately 30% of its transport activity and owns 100 tractor units with an additional 30 belonging to third parties.

All 300 loading units within the so-called "hauled" fleet (tank containers, trailers etc...) are owned because they are expensive and take a long time to manufacture. Equipment is mainly sourced from foreign companies such as CIMC, ONT and Singamas and the company has brought forward the purchase of seven new MAN tractors from next year to this.

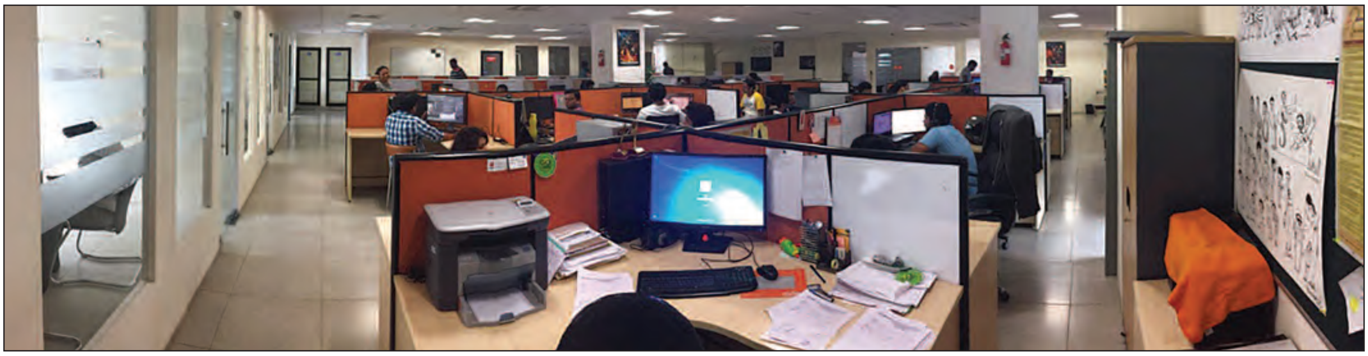
Marenzana is not committed to forming new consortia or joint ventures, but is more interested in developing partnerships without equity participation, as in the long-term partnership with RMI, which has a logistics chain from the port of Rotterdam to Italy by train, before the final delivery by Marenzana's trucks.

Rail is important for foreign trade flows, it amounts to over 10,000 intermodal loading units per year, 5,000 of which are towards France, while the remainder are towards Benelux. Trains are not blocktrains for customers but slots purchased by multimodal transport operators such as those from Hupac (trains from Busto Arsizio) or Shuttlewise (from Mortara).

Both Italian and Swiss funds have been in contact with Marenzana, who explains that "having a high margin, our company is the right target for investment funds. We are flattered by their interest, but for now we are only listening to them...".

ERP technically in charge at the depot

US-based Needa Technologies set its sights on tank container depot operations five years ago, reports James Graham



A classic business school maxim spurred Needa Technologies Inc to begin developing a software product for the tank container depot business: identify a gap and fill it. Two years of R&D followed before the successful launch of its software product for tank container depots in 2014.

"Technology is always evolving. There is no end to the revolution that is happening in this domain. Likewise, the advancement of technology at depots is also evolving at a rapid pace," says Needa associate Sayantani Haldar. "We saw gaps in the software that is given by OEMs to the depots. We came up with a robust technology stack software which is not only low-cost and easy-to-use but also caters to all departments in a depot.

"When we designed our software, we kept in mind both connected and disconnected architectures given the varied conditions in a depot. Our software is platform independent and there are no dependencies on operating system or hardware. This enables depots to invest much less in hardware while they explore full capabilities of the software. We also have software on cloud, which will reduce the hardware costs even further."

The technology company has an Indian subsidiary, based in Madhapur, Hyderabad, ideal to service the tank container depot sector on the sub-continent and throughout Asia.

Since its launch, Needa Technologies Inc has been constantly working closely with its initial clients in Thailand and India: SO-Tank Cleaning and OGCS, says Sayantani.

"We mapped their business processes with our software," she says. "The software has been running successfully for the last three years and we are happy to serve them with our immediate Service Level Agreement technical support team."

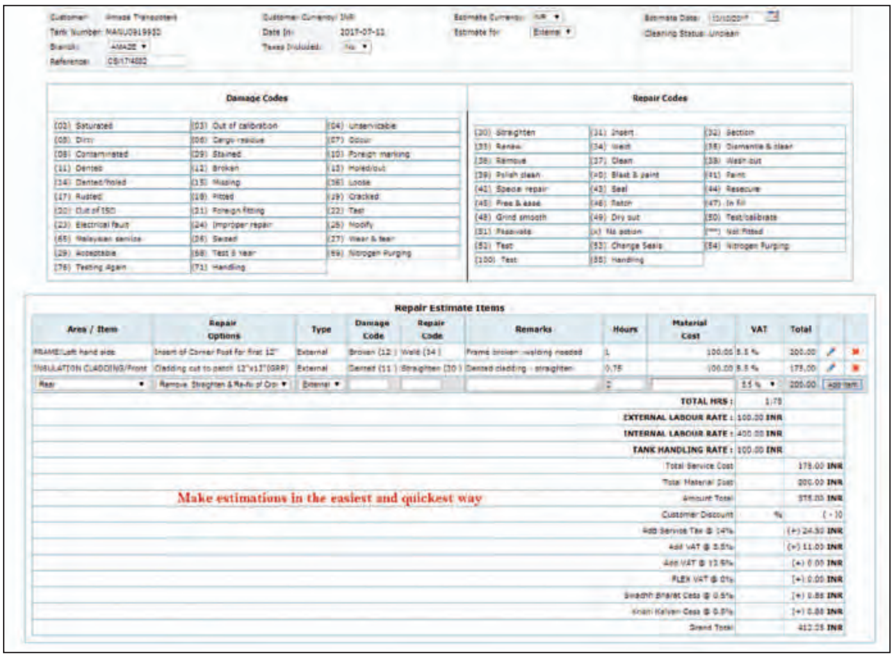
In order to boost its potential client base and tap into the international market, the company has free demos scheduled every week with flexible time windows for potential customers.

There are 20 staff at the New York state headquarters and another 140 in Hyderabad. Needa Technologies has a target, qualified customer base of 550 customers in and around India and Asia. Sayantani says: "Though the Time-to-Market (TTM) is huge, we are hoping to partner with 10-15 customers this year."

After two years of study and research, the company determined that the vertical required a low-cost, effective, easy-to-use ERP (Enterprise Resource Planning) package.

ERP is a business process management software system that enables an organisation to use a network of integrated applications to manage the business while automating many essential back-office functions related to technology, services and human resources.

The global ERP market is undergoing phenomenal growth.



In 2015, the worldwide market value was $82.1bn in licence, maintenance and subscription revenues. The market grew 4%, from $24.4bn in 2012, to $25.4bn in 2013.

According to *Forbes* magazine, the high growth areas of the ERP market are being driven by companies who see cloud-based systems as more agile and responsive to their changing business model needs. Legacy systems designed for long-gone business models, yet still on requiring maintenance, are being extended today with cloud-based systems capable of keeping pace with an entirely new level of performance that companies need to survive and grow.

Needa Technologies is part of the multi-billion dollar IT industry in India. Revenue, excluding hardware, was $154bn in 2016/2107, up 20% on the previous year. The contribution of the IT sector to India's GDP was 7.7% in 2016.

The product

DepotMan is Needa's core depot software package. It provides clients with the "easiest way" to control depot, yard or container terminal operations, ioncluding around-the-clock daily operations. Depot services are mapped in the system. These can include tank cleaning, repairing facilities and periodic testing.

The software is independent of the platform and hardware and can be used and accessed on mobile devices.

Operational and management data is shared across departments. Automatic communications by email are generated for depot clients, updating them regularly on the status of their tank containers.

DepotMan can also serve managerial requirements for information and management data. This can include software development, server and data centre management, networking services, virtualisation and storage.

The software will benefit from release regular updates, notes Sayantani. "Though we have a fixed price set for the software, it only covers our development expenses. We have a cost applied for every 10-15 users. However, we are quite flexible on the pricing and we have free 2-3 month trials for potential customers to evaluate the software before investment.

DepotMan was developed through PHP, HTML and MySQL technology. This meant the company has had no issues finding suitably trained IT staff to create the software.

She says: "It has not been too difficult to find people. The real complexity lies in the architecture and design. We spent a lot of time in designing the architecture and algorithms for this software."

The DepotMan package has been designed to allow depot managers instant operational and flow information, and customers to access data and information in real-time enquiries.

In terms of financial reporting, the software offers a range of data areas, including core financials such as sub-ledger accounting, multi organisation access control, tax compliance, multi-currency bank accounts, localisation, global intercompany system and general ledger. Several bank accounts, including detailed payments and deposits, currencies and historical currency rates and bank account reconciliations can be monitored.

Sales data, including unlimited customers and customer branches, repair estimate to invoice, batch invoicing, editable sales documents, point-of-sales, sales areas, types and groups, credit notes can also be provided.

As well as information on purchases and inventory control, a significant element for many tank depot managers will be its repair estimate feature. This allows the operator to create repair estimates, obtain online approval from customers, create work orders, create invoice for repair estimate and send attachments through email. The customer portal also allows the customer to log in and view tank damage images. There is a facility to approve or reject repair estimates, comment and download reports.

Support

The company provides customers with product training and support. Sayantani says: "It is easy to find the staff. For existing customers, we take care of every support issue. To decrease the amount of support required, we aim to make the software bug free."

The software can also be used in the wider tank container industry, notes Sayantani. She says: "It can be used for all 20ft or 40ft containers; for storage, handling, testing and repairs of IMO tanks, dry containers and reefers."

For more information, please visit the website www.depotman.in

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