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SGS, ABS and GTIS collaborate to create a global tank container inspection player

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# Tankcontainer MAGAZINE

Volume 5 | Issue 2 | June 2018

**Cryotech Middle East  
Operations Manager Darren  
Rycroft on the region's unique  
challenges and opportunities**





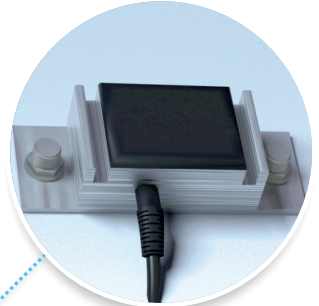
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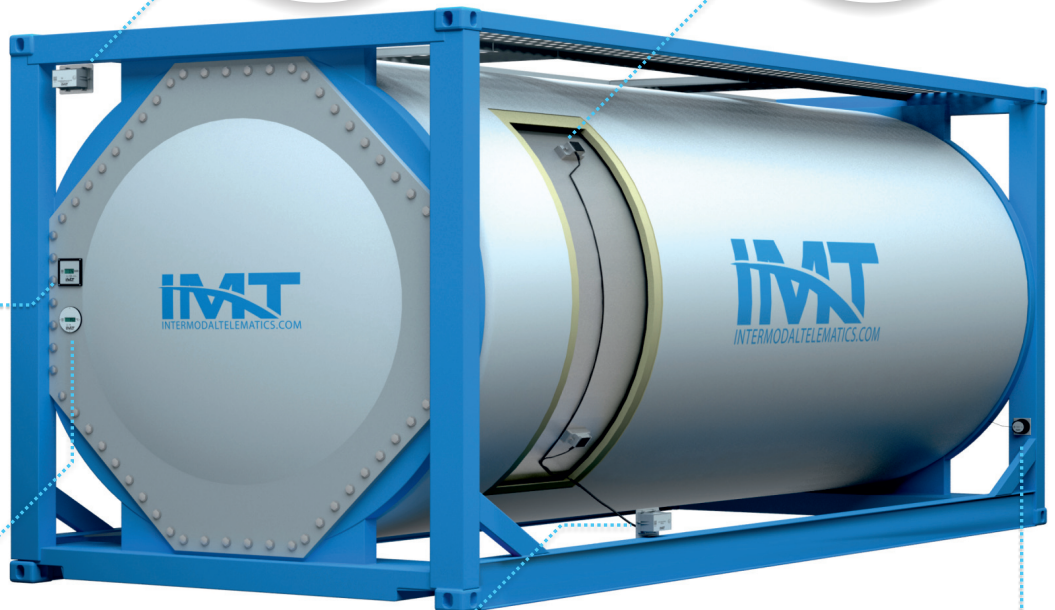
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## NEWS

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HOYER, the transport and logistics service provider, can again look back on a highly successful fiscal year. Group turnover in 2017 was recorded at €1,203m (US\$1,440m), the highest sales in its history. This corresponds to 1.2% growth compared with the previous year's €1,189m.

## Front Cover Interview

Tankcontainer Magazine discusses the unique challenges and opportunities of the Middle East market with Darren Rycroft, Operations Manager of Cryotech Middle East.



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GPCA 2018 Review  
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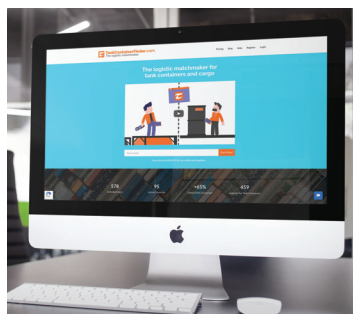
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## EQUIPMENT



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## OPERATOR



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SGS, ABS and GTIS collaborate to create a global tank container inspection player



# TANK CONTAINER SOLUTIONS

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# Hot spots in the Middle East

Nikola Tesla, the Serbian-American physicist and inventor – after whom the electric car company is named – famously ended up falling in love with a pigeon before dying penniless. But will some of the tank container players who fell in love with the shimmering mirage of GCC\* petrochemical growth suffer a similar corporate penury from their Middle East operations as the region loses its cheap and plentiful feedstock advantage?

Gone are the glory days of an endless supply of very low-cost gas feedstock. Today, those gas reserves are allocated to existing GCC petrochemical facilities and to a small group of new petrochemical projects. Feedstock prices have risen – albeit from a very low base – and new shale-based competition has emerged in North America. Why take the political and economic risk of investing in the GCC when the region's competitive advantage is now far more marginal?

However, this headline narrative hides a different story, and one that is more relevant to tank container players. Gas feedstock usually goes into polyethylene, which offers relatively few business opportunities for tank container operators (one of which is importing liquid co-polymers from Asia, Europe and the US for LLDPE production). But the structural limitation on gas feedstocks has caused many producers to diversify their product range and specialise on a broader product portfolio. This strategic shift has been designed to minimise the dependency of GCC producers on price-sensitive, difficult-to-defend commodity products while opening new markets for more added-value petrochemicals. These more specialised products tend to be liquid, rather than polymer, and usually require smaller lot-size, bulk Dangerous Goods transport for which tank containers are expressly designed.

The biggest and best example is the inclusion of liquid naphtha feedstock is Sadara, the \$20 billion Saudi Aramco/Dow Chemical joint venture project in Jubail (\$20 billion is, coincidentally, the same amount Saudi Arabia earns each year from pilgrims travelling to Mecca). For the past 18 months, 26 world-scale plants have been ramping up their specialty chemical production, bringing to fruition the world's largest single-site petrochemical project.

So far, this has not provided a bonanza for tank container operators, not least because Dow's volumes

for its deepsea traffic from Sadara have been below expectations. For the volume that is moving, Dow's 'last cargo' restrictions policy has severely limited the availability of suitable tank containers. This, together with the very low level of imported tank containers into the GCC, has led to the need to reposition tank containers from Asia, South Africa and even the US to meet demand. India, the traditional location for repositioning into the GCC, has very few tank containers available due to the strength of the Indian market.

Apart from Dow's disappointingly low export volumes, Sadara's domestic business – including 100 shuttles a day between the plant and Sabtank's storage – is buoyant. The logistics providers that have patiently endured the long wait for clarity on Sadara's demand – and endured the uncertainties and agonies of the Royal Commission's planning process – are at last beginning to reap the reward. As the US comedian Woody Allen said, "90% of success is turning up" – those that didn't turn up in the early days of Sadara's long development shouldn't expect to gain a meaningful position now, especially against the world-class operators that have captured Sadara's business.

The mis-balance between tank container imports and exports became acute in Q3 and market rates have inevitably risen. Fewer tank container imports inevitably means that cleaning depots in Saudi Arabia's key Eastern Province are quiet. In Dubai, the new RSA-Talke and Tristar depots have taken business from JTS, which is establishing a new depot in Sohar, Oman. Innova's activity in Sharjah – and soon in Jebel Ali – is driven by the captive cleaning demand of its fleet of over 2,000 tank containers, many of which are busy carrying pyrolysis gasoline out of Saudi. In Eastern Province, more depots are being considered, often as a mandatory requirement of a broader logistics investment.

Without the step-change in demand created by Sadara, tank container players would be going head-to-head for the long-standing business at petrochemical producers such as Farabi, Chemanol, Jana, SABIC, Tasnee, Sipchem, Aminat, etc.

\* Gulf Cooperation Council: Saudi Arabia, UAE, Qatar, Kuwait, Oman, Bahrain

Leslie McCune, Editor





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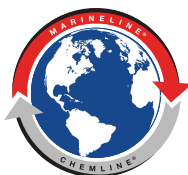
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TOMORROW'S SOLUTIONS TODAY



# A record year for HOYER Group in 2017

HOYER, the transport and logistics service provider, again looks back on a highly successful fiscal year.

Turnover achieved by the HOYER Group in 2017 was recorded at €1,203m (\$1,440m), the highest sales in its history. This corresponds to 1.2% growth compared to the previous year (€1,189m).

The internationally oriented Hamburg family business plans further investments in the future.

Earnings before taxes (EBT) was €40.6m, the second-highest in the company's history (previous year: €40.4m). The operational cash flow of the HOYER Group increased to €75.2m, up from €65.3m.

The HOYER Group pursued consistent internationally aligned growth in 2017. As a result of the takeover of a French competitor, and with a fleet of more than 43,100 Intermediate Bulk Containers HOYER is one of the leading companies worldwide in this segment. The logistics company has also strengthened its operations in the North



American and Asian regions. HOYER is now present for its customers in over 115 countries.

The company focused in the past year on further development of its own digitalisation strategy. The central element is the Smart Tank, which enables products in tank containers to be monitored by using innovative sensors.

Equipping the tank container fleet with complex telematics was driven forward decisively in 2017.

In the past fiscal year, the Hamburg logistics specialist invested a total of around €90.0m in innovations up from €102.2m in the previous year.

Ortwin Nast, Chief Executive Officer of the HOYER Group, said: "We see innovation as an opportunity to fulfil our customers' wishes better than others, and to design our processes to be more efficient, secure and economical."

## Crowley and Pivotal sign major LNG contract

Crowley Fuels has signed another multi-year supply contract with Pivotal LNG to support a major pharmaceutical company's energy needs in Puerto Rico.

The contract, executed through Crowley subsidiary Carib Energy (USA) LLC, calls for Crowley to transport LNG from Pivotal facilities on the mainland to the island manufacturer.

Crowley's Vice President, LNG Business Development, Greg Buffington said: "We are very pleased to enhance our relationship by continuing to grow our LNG services and volumes



with this critical customer in Puerto Rico. Crowley will continue to provide an uninterrupted supply chain of natural gas to the customer's site, just as we have done since 2014, helping them utilize a safe, reliable and

environmentally friendly fuel for their operations."

With Crowley's supply chain solution, LNG is loaded into Crowley's 10,000-gallon ISO containers at one of Pivotal's LNG supply sources in the southeastern





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U.S. These are then transported via truck and loaded onto Crowley vessels in Jacksonville, Fla. Crowley then provides ocean transportation and delivers the LNG to various customers in Puerto Rico.

Vice President of Pivotal LNG, Tim Delay said: "Pivotal and Crowley continue to work together to expand the delivery of LNG to companies in Puerto Rico. Liquefied natural gas is a clean, domestically produced alternative fuel that is being used by multiple industries to reduce emissions and energy costs. This transaction serves as another example that the partnership and the virtual LNG pipeline we have created with Crowley delivers an economic, reliable and environmentally friendly fuel to the island."

Once operational, Pivotal expects to source LNG volumes from the JAX LNG plant that is being jointly developed with Pivotal's partner, Northstar Midstream, in Jacksonville. JAX LNG is a new, state-of-the-art liquefied natural gas facility and will be North America's first coastal LNG facility with marine and truck loading capabilities. The JAX LNG facility is expected to go into operation in 2018.

## Richter's new website

Richter Chemie-Technik, a global market leader of fluoropolymer lined pump and valve solutions has a new website.

It has a clean and uncluttered design with easy navigation and allows users to share feedback on blogs, locate Richter's partners globally or contact specific departments.

Keshwar Anroedh, Director Marketing & Product Management said: "We wanted to ensure that the firm's renowned capabilities were accurately reflected via an enhanced online presence." Go to <http://www.richter-ct.com>.

## Hans-Jörg Bertschi honored with LEO-Award for lifetime achievement

At this year's LEO-Gala in Hamburg Hans-Jörg Bertschi was presented with the Award in the category 'Lifetime Logistics Achievement'.

The prize honours his role in Switzerland's rail based transit transport policy, the development of a European intermodal transport network as well as his accomplishments in successfully growing the Bertschi Group into a global chemical logistics player over the last 30 years.

Already in 1985 Hans-Jörg Bertschi tackled Swiss transport transit policy in his doctoral thesis, demonstrating the feasibility and macroeconomic benefits of a flat rail link through the Alps from Germany to Italy.

The following political discussion added new impetus to this ambitious project, resulting 31 years later in the opening of the Gotthard Base Tunnel (GBT).

Bertschi Group has been an advocate of intermodal transport since over 50 years, successfully shifting long distance transports from road to rail across Europe.

In his role as Chairman of the Board of Directors of Hupac, Hans-Jörg Bertschi is actively developing a rail-based Intermodal Network all around Europe and by that makes a big contribution to safe, sustainable and environmentally friendly freight transport.

The award also acknowledges his achievements as entrepreneur. It is impressive to see, how Hans-Jörg Bertschi formed the logistics company from Dürrenäsch during his 30 years, 24 thereof as CEO.



The medium-sized transport company developed into a globally acting service provider for the chemical industry with 2,800 employees, more than 1,000 trucks and 32,000 containers.

By the way, when Bertschi entered the family business, the number of employees and containers reached both around 200. With a strategic vision of sustainable and safe transport, he developed the company to today's size.

As of August this year Hans-Jörg Bertschi steps back from the operational management of the Bertschi Group and will, in his role as Executive Chairman, concentrate on new market activities and strategic projects.





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# Leschaco launches corporate venture

In its continued efforts to drive forward innovations Leschaco (Lexsau, Scharbau GmbH & Co. KG) set up its own independent startup, Logward GmbH & Co. KG.

The launch of the new enterprise is part of Leschaco's digital strategy and will assist the group of companies in identifying new commercial opportunities, the development of innovative business models and new digital freight forwarding services to meet future customer requirements in the best possible way.

The company's target is to build software solutions which automates the operational freight forwarding processes along the supply chain which are fully focused on customer needs in the digital age.

Digitalization is changing the logistics industry more than any technological progress of the past decades. "Our future success will therefore depend crucially on our own digital transformation. Our credo is to build on the established and focus on the new. With our digital projects, we have been on the right track for decades.", says Jörg Conrad, owner and CEO of the Leschaco Group.

He sees digitalization as an opportunity and is pursuing the goal of becoming even faster, more efficient and more attractive for customers by founding his own.

Meanwhile, following the opening of its own branch in Valencia in April this year, a second Leschaco Iberia S.L. site in Barcelona became available to all Spanish customers from June.

"For Leschaco it is an important strategic step to be present in the two large industrial regions of Spain", explains Conrad



Barcelona's geographical location is an advantage for the logistics industry. The port is connected to over 850 ports worldwide and has optimal connections to the hinterland thanks to extensive road networks and a good rail infrastructure. Barcelona-El Prat Airport is the seventh largest airport in Europe.

Constantin Conrad, son of the owner Jörg Conrad, takes over the management of the Barcelona office. The 26-year-old first completed a dual course of study in a shipping company, where he was subsequently employed for 3 years.

He then went on to complete a

2-year MBA program at IESE Business School in Barcelona, which he successfully completed in May of this year.

Constantin Conrad was already involved in the Leschaco group of companies during his MBA program and was in charge of the founding of Leschaco Iberia S.L.

"Leschaco is a traditional, successful and innovative family business. Our company will remain in family hands in the future and therefore I am pleased that my son Constantin will now take over the management of the Barcelona office and thus strengthen Leschaco Iberia", says Jörg Conrad.

## Tragedy sparks warning from ITCO

The International Tank Container Organisation (ITCO) has reminded its members that personnel should not enter tanks without the due process of a valid tank entry permit following the death of two men in Australia.

It was reported that two men died during the cleaning of a tank that had last transported a sugar-cane by-product containing 4% urea.

ITCO stressed that both non-regulated and regulated dangerous goods can pose hazards.

Tank container cleaning is one of the most important and dangerous processes in the transportation chain. The organisation notes that the availability of a suitable cleaning station must be taken into account before a cargo is accepted for



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transportation and that not all cargoes will be able to be processed by an individual cleaning station.

Tanks should be dried immediately after cleaning. It is highly probable that the final rinse water will be chlorinated which will corrode stainless steel. Failure to clean correctly and immediately

after discharge can result in the next cargo being contaminated with the former and or corrosion affecting the pressure vessel.

ITCO states that empty and uncleaned tanks must be treated as if they were loaded with the last product and a full MSDS sheet must be available for the cleaning station prior to cleaning.

When entry into a tank container is necessary, only trained personnel should be permitted. Additionally, tanks should only be entered if they have a valid cleaning certificate.

Lastly, before entry into a tank, atmosphere monitoring should be undertaken to ensure that the atmosphere will sustain life.

## Express chemical tank wash rack busier by the day

WITH the opening of its newest location, Express Container Services now has two tank wash racks serving the Houston, Texas, market. This is also one of the largest of 14 facilities in the Express Container system.

Opened in January, the new wash rack at 8700 Industrial Drive occupies a 16-acre site on the north side of the Houston Ship Channel. The facility is dedicated to chemical tank cleaning, but can also provide a diverse range of equipment maintenance and ISO tank container depot services through third-party contractors.

"We've been busy since we opened the doors on this new wash rack, and we are very happy with where we are in the start-up process," says Matt Moser, general manager of Express Container Services.

"We have the systems and team in place to handle some of the most difficult chemical tank cleaning jobs.

"Across our system, we're going strong. We had a record 2017 by providing quality tank cleaning, great customer service, and stable pricing. Resolving problems quickly helps ensure satisfied customers. Even though the labor market is tight, we are finding the workers we need.

"We continue to pursue growth opportunities in major chemical markets, and we currently have a midwestern location under consideration. We're looking for



acquisitions in the right places, but most of our growth will come from existing facilities in the Express Container system."

Established in October 2002 by Moser and three partners in Pittsburgh, Pennsylvania, Express Container services has steadily grown to 14 facilities serving some of the nation's largest bulk transporters, tank container operators, and intermediate bulk container (IBC) operators with full service tank cleaning, convenient locations, superior driver rooms, competitive pricing, and quality service.

"Our St Rose, Louisiana facility was purchased in 2002," Moser says. "In 2005, we purchased Mast Tank Cleaning Inc facilities in Atlanta and Winder, Georgia; and Charlotte and Greensboro, North Carolina. In 2008 we opened Keasby, New Jersey; and in 2009 we bought our Ohio operations

(Cincinnati and Grove City) from Cargo Clean Inc. Our Reserve, Louisiana facility was purchased August of 2014 from Schneider Bulk. We also have locations in Creola, Alabama; and St Gabriel, Louisiana.

"We have enjoyed this growth largely due to the dedication of our personnel, great service, and the tremendous support from our customers. Our managers are out on the floor directing operations and making sure tanks are cleaned correctly. That really has been the key to our success."

Work on the new Houston wash rack started in May 2017, but a number of factors interrupted the project along the way. Hurricane Harvey was one factor that actually had little or no impact on the work underway at the new wash rack.

"We had eight feet of flood water at our other Houston area

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wash rack, which is on the east side of the city," Moser says.

"The building with the tank cleaning equipment had four feet of standing water, and it took 21 days to restore operations. The new location was high and dry."

Extending from the office building are 14 work bays – eight for tank cleaning and six for truck and tank maintenance operations. Third parties provide the maintenance services: a tank fleet tenant offers tractor and trailer service from two maintenance bays. A third-party ISO tank container depot operator provides tank container repairs and inspections.

The eight tank cleaning bays are dedicated to chemical tank cleaning.

Some of the other Express Container wash racks also offer foodgrade tank cleaning, as well as sanitary washouts of dry vans and refrigerated trailers used to transport food cargoes.

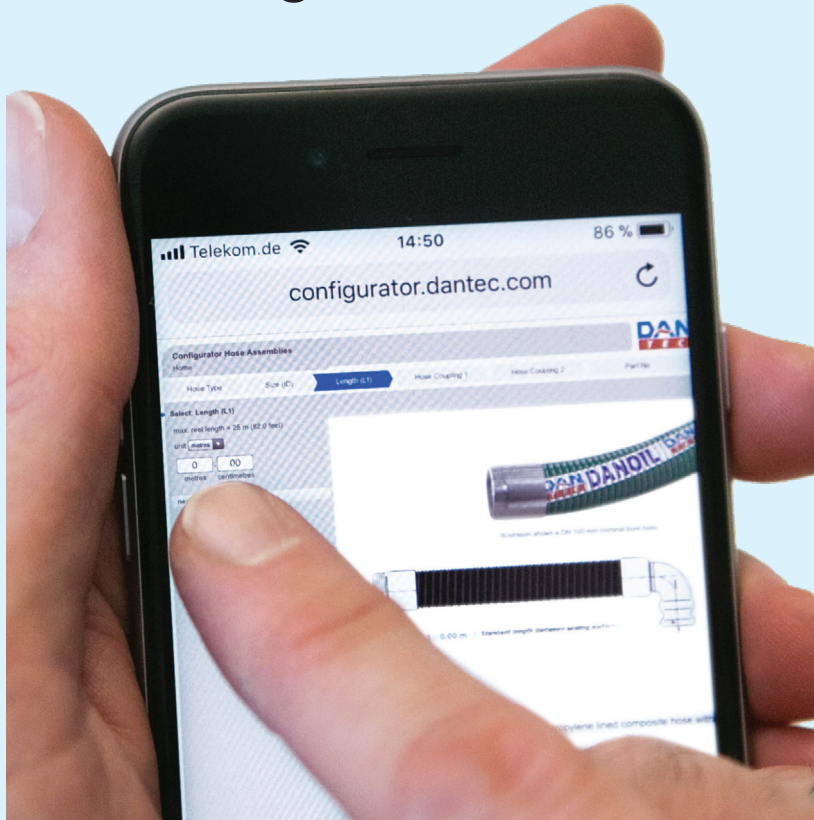
The new Houston location currently can clean 80 to 90 tanks a day.

Twenty-six-foot-wide bays can accommodate two tank trailers parked back to back. Eight tanks at a time can be cleaned with the recirculating vat-style wash system.

An Express Container division based in Baton Rouge, Louisiana, fabricated and installed the wash system and all of the metal stairs and platforms in the wash bays. "The fabrication team gives us greater flexibility, because we can do virtually all of the equipment design, fabrication, and upkeep in-house," Moser says.

The vat system includes 550-gallon stainless steel water tanks and 750-gallon cleaning solution tanks. Sellers and Gamajet spinners are powered by 75-horsepower and 40-hp electric pumps. Twenty-five horsepower pumps help limit the amount of water needed for rinsing cargo tanks.

## New Configurator from Dantec



Dantec Ltd has improved its digital online service for customers. The configurator for composite hoses has now been launched.

Users are able to create and compare millions of possible hose combinations, providing purchasers with a time-saving platform without needing to look through numerous data sheets and brochures.

It's a fast and safe service to visualise a required hose assembly or place an order – and also completely independent of the desk in the office.

The composite hose manufacturer, near Liverpool UK, supplies 66 different hose types, available in sizes from 1" to 10", each hose assembly being bespoke to customer requirements.

This adds up to 23.5million

possible hose assembly combinations (so far).

This number will largely increase with added options for plugs, caps and accessories.

The Dantec Configurator helps the user to easily pick the required hose type by filtering selected specifications.

These factors include; application group, material liner, inner helix, outer helix, maximum working pressure, fire-safe technology and the max/min temperatures.

Once the user has selected the hose type, they are able to virtually build the composite hose assembly by selecting the required size, length and required end couplings and securi

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## First LNG goes into ISO tank container at Eagle's new plant

Crowley Maritime Corporation's LNG group has successfully executed the first loading of nearly 11,000 gallons of liquefied natural gas (LNG) into an ISO tank container at the new Eagle LNG Partners liquefaction facility located near Jacksonville, Fla.

Crowley loaded LNG into the ISO container and delivered it over the road to the port of Jacksonville for ocean transport to support customers in Puerto Rico. With the addition of the new plant, Crowley and Eagle LNG have expanded the supply and availability of LNG services to customers in the U.S., Caribbean and Latin America.

"With the successful LNG tank container loading at the Eagle LNG Partners' Maxville Facility, Crowley can offer even more flexible services and sourcing locations to supply customers with LNG as a cleaner, safer fuel source. The new plant location means LNG can be easily produced and transported to the port all within the Jacksonville area," said Crowley's Matt Jackson, vice president, LNG. "Not only will Crowley and Eagle LNG Partners provide a fuel source that decreases environmental impacts, Crowley can provide supply chain and engineering solutions that are resilient alternatives to traditional energy sources in Puerto Rico and other markets."

The plant, which is in the Maxville area of west Jacksonville, has the capacity to produce up to 200,000 gallons per day of LNG, which offers lower emissions than other fuels and has diverse industrial and commercial capabilities. The Maxville LNG Facility has a 1-million-gallon storage tank and a modern system to load fuel into ISO containers for truck delivery to the port quickly.



"We are very pleased that the first commercial load of LNG from the new Maxville LNG Facility is destined for Puerto Rico via ISO container. This LNG plant is the embodiment of Crowley and Eagle LNG's commitment to the community in the North Florida region and Puerto Rico. Having the first commercial load sold to Crowley for routing through the port of Jacksonville to Puerto Rico is only appropriate," said Sean Lalani, president of Eagle LNG Partners. "The new Maxville LNG Facility is the first LNG plant to be operational in Jacksonville and features numerous design enhancements to allow us to send out LNG to the port of Jacksonville and throughout the region safely and efficiently. LNG continues to become the fuel of today and Jacksonville is the epicenter of this transition."

After receiving the LNG, the ISO containers are transported by truck and loaded onto vessels in Jacksonville. Crowley then provides ocean transportation and delivers the LNG to various customers in Puerto Rico and other locations in the Caribbean. To date, Crowley has successfully transported more than 6.5 million

gallons of LNG as well as provided engineering and other services for pharmaceutical and other companies.

LNG from Eagle LNG's new plant also will power Crowley's two new Commitment Class, combination container/roll-on roll-off "ConRo" ships for the U.S. mainland to Puerto Rico trade. The use of LNG in the ships El Coquí and Taíno will result in a significant reduction of emissions as compared to existing fossil fuels.

To support fueling the ships, Eagle LNG Partners and Crowley have constructed a dockside LNG fuel depot on Crowley-leased property at the JAXPORT Talleyrand Marine Terminal on the St. Johns River. The marine terminal, which uses cutting-edge technology, was engineered to feature a compact footprint specifically for ship bunkering operations.

Crowley's LNG engineering team has partnered with Eagle LNG for the successful completion of the port fuel depot.

For more than 65 years, Crowley has been a leading provider of ocean transportation and supply chain services between Puerto Rico and the U.S. mainland.



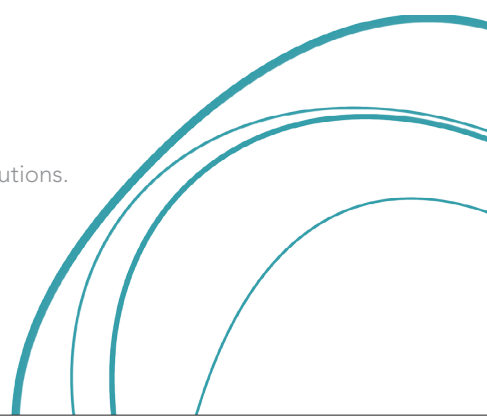
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## Bertschi opens plastics hub at the port of Antwerp

On June 13th global logistics service provider Bertschi celebrated the opening of a new plastics hub of more than 25,000sq metres, part of a bigger area called 'Antwerp Zomerweg Terminal (AZT)' and ideally located in the port of Antwerp. Various value added logistics services are provided, including transshipment, storage and distribution.

The hub consists of a container storage area with a capacity of more than 20,000 tonnes of product, as well as two tilting platforms for the decanting of 20ft and 40ft sea bulk containers into 30ft European dry bulk containers.

The plastic products are stored in these liner boxes at the site itself.

"From the arrival of the plastics in Antwerp, over the decanting and storage to their final distribution within Europe, this new facility gives us the possibility to offer an all-in-one solution to our customers", says Hans-Jörg Bertschi, CEO and Chairman of Bertschi Group.

Product storage in 30' box containers has various advantages compared to concepts of vertical



silos. Whilst working with boxes, the container is used both as cargo transport unit as well as means of storage, whereas the use of vertical silos entails additional transshipments and, therefore, reduced product integrity.

The resulting lower number of handlings and the fact that cost is only incurred for bulk material effectively stored in a container concept, reduces the total supply chain costs. At the same time, the concept reduces the carbon footprint by increasing intermodal deliveries.

Also, when it comes to customer service, box containers proof to

be superior. Where vertical silos are fixed to their location, box containers allow to store the product close to the customer and, therefore, add flexibility to react on changing market needs.

"Bertschi was able to demonstrate the advantages of the container concept for our product flows and convinced us to implement this solution. We are very pleased to be the launching customer of the new plastics hub and the startup of the project so far", states Benny Mermans, General Manager EMEA for Chevron Phillips Chemical Company.



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WHEN IT MATTERS

# Cryogenic immersion

*Tankcontainer Magazine* discusses the unique challenges and opportunities of the Middle East market with Darren Rycroft, Operations Manager of Cryotech Middle East

**TCM:** What assets and services does Cryotech Middle East offer?

**DR:** Cryotech Middle East (CTME) offers clients safe and secure storage for empty gas and cryogenic tank containers with easy access to and from Jebel Ali in the United Arab Emirates (UAE), the Middle East's largest port. We are located in Dubai Investment Park II.

CTME's services include the periodic testing of tank containers aligned with third party testing agencies, welding and fabrication work, vacuum services and general repair work. We also have a first-class paint booth where we carry out anything from general touch-up work to the full repainting of tank containers.

Another valuable asset is our bodyshop and repair centre. As an approved insurance repair centre, we have state-of-the-art equipment for undertaking chassis straightening and alignment repairs. There are a large number of roll-over accident vehicles that pass through our workshop and which need to be re-shelled, repaired and re-painted.

A highly skilled workforce carries out all the mechanical, electrical and fabrication work required to get these vehicles back on the road. We also have a contract to build, refurbish and repair aviation re-fuelling vehicles, both for civil and military operations.

The skillsets required for this work - and the stringent safety requirements that have to be met - means we are constantly under



inspection in order to maintain the required standards in this industry.

**TCM:** What is the company background?

**DR:** Cryotech Middle East was formed approximately four years ago with our joint venture partners CRYOVAT, based out of the Netherlands.

Wim and Tim Rootselaar, brothers in the industry for many years with Tankbouw Rootselaar, were looking to move into the Middle East after a successful joint venture with Cryotech Asia (CTA) based in Bangkok, Thailand. At the same time, Al Shirawi Enterprises' director Thani Al Shirawi was also looking for new business opportunities to expand the company portfolio and the result was the formation of a joint venture, Cryotech Middle East.

Cryotech Middle East was formed to fill a void in the market. As there were no dedicated repair

depots in the region for tank container lessors to send their cryogenic tank containers, and equipment for repair and/or periodic testing, a joint venture was formed and Cryotech Middle East opened its doors to cover those requirements.

As Operations & Business Development Manager, my role was to build a professional workshop offering tank container operators and lessors a viable option to sending tank containers back to Europe, Asia or beyond, to have service and repair work carried out.

The company has seen a steady increase in client business recently and I am delighted to see these customers return to us for specific repair and re-certification work on their tank containers.

This is a good sign that we are once again offering a professional service and alternative solutions to our clients.



**TCM:** What strengths do the Rootselaar Group and Al Shirawi companies bring to Cryotech Middle East?

**DR:** The Rootselaar name is synonymous within the industry with quality and reliability and is well-respected by both competition and clients alike. With many years of manufacturing experience in the cryogenic field, Rootselaar's foundations are financially strong which, in the current climate, is especially important as clients need to know that their investment in our products will be delivered on time and without complications.

Al Shirawi Enterprises is also held in high regard within the United Arab Emirates and wider Middle East market. With a diverse portfolio, Al Shirawi has a reputation for building and operating professional workshops to support our sales of trucks and heavy equipment.

With many years of experience, director Thani Al Shirawi has forged a name in the market place that has raised the professional standards for 'after sales' service. The same expectations are there for Cryotech Middle East - we are building a name for ourselves as a professional and reliable repair depot and one that clients can be assured of when trusting us with their equipment.

**TCM:** What are the unique challenges of operating in the Middle East region?

**DR:** As everywhere, uncertainty in the markets is testing most industries at the moment and the Middle East is no exception. Larger companies in the industry are hesitant to invest, expand and develop their business operations both here in the United Arab Emirates and in the wider Middle East market. Those that have a presence usually find their operations take them further afield and outside the region.

The climate is another challenge

for everyone. With summer temperatures hitting the high 40s and over 50°C on a regular basis, carrying product around requires well-maintained tank containers and intense logistical management to ensure holding times are maximised.

Daily road closures at peak times in the morning and evening for heavy trucks is another challenge. With no rail network, the United Arab Emirates and Middle East has a very high demand on its road network, which at times is very stretched.

Shipping tank containers around the United Arab Emirates and other Middle East countries requires careful planning. Crossing borders into neighbouring countries means all documentation has to be complete and accurate or days can be lost at the border crossings.

**TCM:** How seasonal is the demand for T50 gas and T75 cryogenic tank container depot services?

**DR:** Cryotech Middle East as a repair depot has little seasonal variation with tank container leasing companies constantly moving tank containers in and out of the region, depending on their supply requirements

**TCM:** Who are your usual customers?

**DR:** Typically, these include TML (Taylor Minster Leasing), Den Hartogh, UAE-based Brothers Gas, Linde and Hoyer, to name but a few. We also have many local clients in the region and work on cross-hired tank containers.

**TCM:** Depot activity in the GCC is muted at the moment because of the low number of imported tank containers. Is the same true for gas and cryogenic tank containers?

**DR:** Yes, we have seen some movement and an increase in tank

## CV: Darren Rycroft



Darren Rycroft has worked in the service business since serving his time as an apprentice in the UK over 30 years ago. He worked for a major manufacturer of heavy construction equipment for over 20 years and has always been involved in running workshops in the UK and, for over eight years, in Russia, the Commonwealth of Independent States (CIS) and in the Africa and Middle East regions.

As the Territory Service Specialist, he was responsible for setting up workshops and implementing dealer development standards in those countries for newly-appointed and existing dealerships, along with technical training and sales support.

He has lived and worked in the UAE for the past fourteen years for Al Shirawi Enterprises and has been responsible as Service Manager for running and developing their heavy equipment workshops for construction equipment and forklifts trucks. Building a reputable and professional aftersales service has always been a company priority. The company prides itself on offering European standards in the United Arab Emirates, something which has been lacking in many areas of industry in the past.

containers in the region but these are relatively small numbers. The bigger players have moved tank containers into the GCC (the Gulf Cooperation Council member states of Saudi Arabia, UAE, Oman, Qatar, Bahrain and Kuwait) with the largest increase being for T50 tank containers and, to a lesser extent, T75 tank containers.

**TCM:** Apart from LNG, what other gases are moved in the GCC?

**DR:** Mainly, we are looking at liquid nitrogen (LIN), liquid oxygen (LOX) and liquid argon (LAR).

**TCM:** Can a full-service off-hire inspection for leased tank containers?

**DR:** Yes. The biggest percentage of our work at Cryotech Middle East is related to leased tank containers passing through our depot. Off-hire reports are delivered after inspection, along with repair estimates for any work that is required. The same happens for tank containers leaving us, and an inspection and tank condition report follows immediately.

**TCM:** Can shell work also be undertaken by Cryotech in Dubai?

**DR:** Outer shell work is undertaken as and when necessary but for inner tank repairs we usually send the tank containers over to CTA in Bangkok or back to the Netherlands, where they have the necessary equipment and experience to carry out such repairs

**TCM:** What are the main differences when cleaning gas and ordinary liquid tanks containers?

**DR:** This does not apply to us as we do not offer a cleaning service at Cryotech Middle East. There are a number of specialised companies in the region taking care of that particular segment of the industry.

**TCM:** There is increasing interest



in gas tank containers by lessors such as Seaco. Trifleet have also entered the market. Will that stimulate the demand for Middle East depot work?

**DR:** We would hope that anyone entering the gas tank container market would create additional depot service requirements for storing, maintaining and carrying out periodic testing as and when required.

**TCM:** Globally, what do you think is driving demand for LNG equipment?

**DR:** Environmental developments. LNG is seen as a bridge fuel between today's situation and more sustainable options such as solar and wind turbine power, which will take time and considerable investment. LNG is a readily-available stop gap fuel, which is driving market demand.

**TCM:** How does the gas market growth rate compare to the growth rate for liquid petrochemicals?

**DR:** Both are at similar levels of growth rate.

**TCM:** How do changes in gas tank container technical specifications and construction affect the work that is needed in depots?

**DR:** With improved designs and layout, tank containers are definitely evolving but the depot requirements remain the same. Providing the correct tools, equipment and training is a necessary for maintaining our service levels.

**TCM:** Do the requirements of GCC customers differ from those in other regions?

**DR:** The area around periodic testing is somewhat different. There are differences in what is required, carried out and expected by third party agencies. Some companies are less stringent than others when it comes to re-testing and certification of their tank containers dependant on who is using the tank containers and where they are being used.

**TCM:** Is most of the GCC gas market LNG?

**DR:** Liquid nitrogen (LIN), liquid oxygen (LOX) and liquid argon (LAR) are more in demand and use in the GCC.

**TCM:** Are depot customer preferences changing in the GCC?

**DR:** Not really, the same requirements are being asked of the repair depots.



# A formidable portfolio

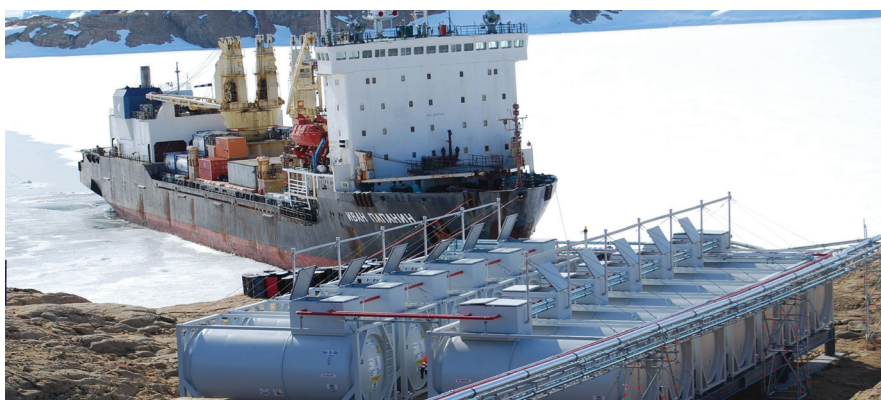
**In late 2017, THIELMANN began delivery of five fuel tank container systems to the Norwegian Polar Institute, destined for the Troll Station research facility in Antarctica**

The tanks will form part of a fuel tank farm, each holding up to 24,000L of diesel which will be used to fuel research vessels and generators that are used for the institute's field research.

The contract was the latest marker in a return to form for the Weitefeld, Germany, based organisation (previously WEW Container Systems), which in 2016 became part of the THIELMANN group following a corporate takeover. The incorporation of the company into the group has strengthened the financial footing of operations at Weitefeld, and expanded the THIELMANN product line into the top end of the container market. Now, taken as a whole, THIELMANN offers containers with storage capacity between one and 50,000 litres, and two of the world's most knowledgeable container companies have merged to present a formidable portfolio to the container industry.

The company's ability to turn around the Norwegian Polar Institute contract so quickly reflects the focussed outlook the management has when it comes to delivering on the industry-leading engineering excellence its products are known for around the globe.

"The five polar fuel tanks were built and delivered within three months of the contract signing, and are now in operation in Antarctica where we are confident they will continue providing fuel to the Norwegian Polar Institute for



the next 30 years or more," Sebastian Bojarski, Head of Sales, said. "As with all THIELMANN container systems, the tanks require minimal site preparation, allowing them to be ready to begin discharging fuel immediately after their arrival on site."

Each tank container is built within a 20'x8'x8'6" welded headbeam frame. Made of stainless steel with 3.0mm double shell, the tanks are equipped for top discharge and are certified to store and transport jet ATF fuel, diesel fuel and petroleum via road, rail and sea. Given the success of the contract, the company expects further orders for additional units from the institute in the near future.

While THIELMANN is perhaps best known for its work in the fuel and water container market, it is a significant player in the chemical, oil and gas, emergency services and nuclear markets also, with its systems approved to transport and store some of the most dangerous chemicals and

toxic gases on earth.

At the top end of the portfolio, its tanks are designed to fit within standard ISO footprints, and its expertise extends to the welding and manipulation of high-value alloys, including Hastelloy and Duplex.

"We work largely in the ISO dimensions in order to maximise the intermodality and handling capabilities of the tanks themselves for ease of transport for our customers," Bojarski said. "Customers don't want to need specialised handling systems for each tank container they own, they want to be able to transport their containers with any vehicle that can handle and transport standard ISO containers."

"In order to achieve this, our systems are DROPS/hooklift compatible, ensuring they can move smoothly through air, land and sea logistics chains."

With the integration of the THIELMANN product line, an increasing portion of the group's output now falls outside standard ISO dimensions. Its smaller

systems include – but are not limited to – ASC aseptic containers, IBC cylindrical containers and LTP cubical containers for the chemical industry, gas and LPG containers, and containers for the storage of non-hazardous and hazardous fluids for the chemical, mineral oil, food and beverage and pharmaceutical industries.

“The chemical, nuclear and other hazardous cargo industries is some of the most interesting work we do, as these industries are so highly regulated and our customers are often operating within very defined parameters in order to ensure that the dangerous goods they are storing and transporting do not harm the environment, employees or the general population,” Bojarski said. “This means complying with different regulatory systems that aim to prevent accidents – and often when these substances are moving through international supply chains different regulations are in place at different points of the journey or for different modes of transport.

“As the consequences of accidents or mishandling can be serious and long lasting, it is in our customers’ best interests to ensure they are complying with all regulations by selecting the correct container to store and transport different classifications of hazardous goods.”

### Engineered to succeed

This is where THIELMANN containers tip the balance, as its technical team can support in the classification of materials by their ‘hazardous material’ definition, and guarantee that products are safely transported from the point of origin to the destination, while fulfilling all the requirements that apply to them en route.

“It’s no good to just offer a one-size-fits-all solution and hope for the best, as tank containers that

will store and transport fuel, water, hazardous goods and toxic materials all have their own operational envelopes,” Bojarski said. “It’s also no good to think that tank containers made in bulk at very low cost are going to be approved to move different types of cargoes through supply chains that may cross different countries or continents, because each region has its own regulations and requirements.

“The key here is to take some of that pressure off the customer by building a lot of the ground work into the basic design – producing patented designs that conform to handling regulations worldwide, then equipping the units to meet the requirements of the specific cargo type. The result is a highly engineered solution that will provide the customer an almost limitless service life if serviced and maintained correctly.”

THIELMANN expanded its servicing operations in 2017, and now offers integrated logistics services from its Weitefeld facility. With this, the company offers comprehensive through-life support services including deployed field service, support and upgrade options, full refurbishment, and spare parts supply for both military and civil customers. This support ensures the high reliability of the tank containers, allowing them to continue to withstand the rigors of multi-modal transport and storage in extremely harsh environmental conditions throughout their decades-long lifecycle.

Service works include 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 thirty months or five years; extensive refurbishment can extend the unit’s life by a further ten to twenty years.

### New markets

Perhaps the most critical aspect of the move into the THIELMANN stable has been the return to a stable financial footing that has allowed the company to continue to do what it does best: innovating. Always looking to capture new market niches, the company is introducing new products to its portfolio this summer, including new water and fuel container systems designed to appeal to customers operating within budget constraints.

The fuel (FSD-10) and water (WSD-10) units – which deliver up to 10,000L of liquid for firefighting, peacekeeping and disaster relief applications – are fitted within DIN 30722-1 PLS/DROPS compatible “A-frames”, creating low profile systems that retain the handling capabilities of the THIELMANN full frame systems. The overall dimensions of the systems allow a transport inside a standard ISO box container for full intermodality.

“The FSD-10 and WSD-10 will fill a critical gap in the market, providing the highest quality, capability and reliability standards while delivering low life-cycle costs and maximising affordability to customers in a wide range of market sectors,” Bojarski said. “Most importantly, they retain the quality engineering THIELMANN tank container systems are known for worldwide.”



# Seek and ye shall find

## Jan Van De Nes follows the development of TankContainerFinder.com

Online platform TankContainerFinder.com started up in February 2017. The “matchmaker for tank containers” looks as if it is here to stay, with the number of users increasing by the day. From the early days, when the concept was to find a “match made in heaven”, the website has developed to become a practical reality.

Co-founder Léon De Bruin explains the success story. With partner and co-founder, Arthur Van Der Hoeven, he started plans for a platform in 2012 but the market told them that a digital match-making operation was not needed. Notwithstanding this, they started building their digital future in 2013.

It took until 2016 before they got the market signals that there was demand for a matchmaker and the service was born. The two entrepreneurs found new partners for the development of the platform.

As a team they performed their Minimal Viable Product in October 2016, which was followed by testing and upgrading along “Build, Measure and Learn” guidelines. The team launched TankContainerFinder.com on February 2, 2017.

From the start, logistics companies and users of tank containers used the platform to search for tank containers in nearby operational yards. Today over 65 per cent of the global operating fleet is registered at the platform and daily bookings can come from 95 countries.

‘We thought we would join 25

supplying parties to the platform as well as 25 potential customers in the first months of 2017”, Léon De Bruin says but reality was different.

‘The number of new users was immediately larger’, co-founder Arthur Van Der Hoeven confirms. It was obvious that the worldwide demand for a “matchmaker” for tank containers was huge.

‘Now in May 2018 we have over 600 registered users, among them over 250 parties - shippers - looking for tank containers for their cargoes’.

This rapid growth is probably also driven by interest in the chemical industries. In this sector, the search for suitable tank containers and logistics companies, such as transporters, is substantial. To make sure TankContainerFinder.com could respond to these demands, the team appointed Sales & Customer Success Manager Wilbert De Jong in November 2017. De Jong has his roots in the chemical industry and was therefore familiar with the problems of the sector when it came to searching for tank containers.

De Jong only sees advantages for the chemical industry when using TankContainerFinder.com. ‘We offer a more transparent and complete overview of all available empty tank containers for all parties that are involved with tank container cargoes on a regular basis’, he says. He also thinks it is

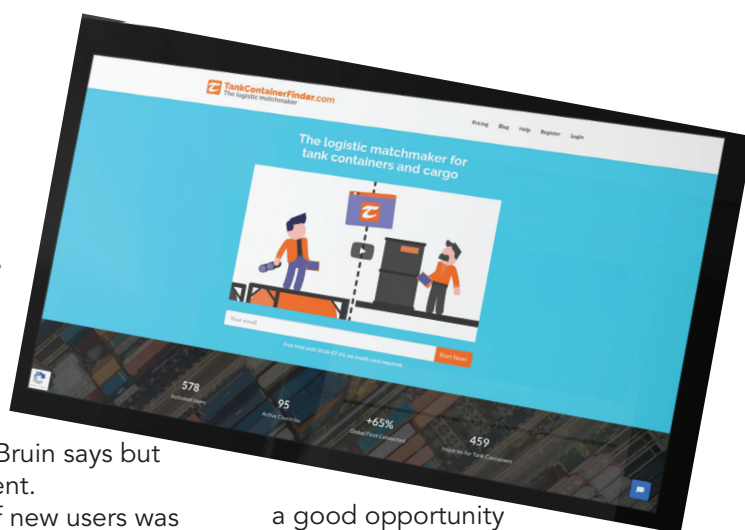
a good opportunity for optimising production planning in chemical companies because of the tracking and tracing possibilities that are now common practice for tank container owners and users. They can link their transportation requirements to their production data and the delivery needs of their customers.

De Jong continues: ‘For example, a manufacturer of paints, glues or detergents can better plan the delivery dates, meaning that he can offer guarantees to his customers’.

The platform offers other possibilities. De Jong says it is unique that one platform can link all the available tank containers (and flexitanks) to all the suppliers of “trucking cargo”.

‘Now we can support every customer in the chemicals sector in different transport modes in Europe’, he says, to include road transport, rail transport and/or inland water transport. All transporting companies are registered in our system’.

De Jong has already seen that the transparency of the platform, which requires the presentation of all loading documents such as the MSDS, reduces the communication problems



between shipper and transporter. He points out that even the purchase of tank containers and flexitanks, as well as the "trucking cargo", will be simplified by using the TankContainerFinder.com-platform. He thinks that optimising the use of the tank container fleet can lead to smaller fleets and cost reductions.

Another unexpected advantage is, according to De Jong, the fact that 'the platform undoubtedly is the best tool for large distributors to present tenders as they reach an enormous group of suppliers'.

There is a strong connection between TankContainerFinder.com and its platform users, which results in a large international network. Because the users are invited to give feedback, the TankContainerFinder.com team can optimise the performance of the platform.

'The developers take so called short-sprints, which lead to new functionalities and updates every four weeks. This also helps to cut costs, giving better cost management by the users', Arthur Van Der Hoeven explains.

## Automation

Other things have become possible - using the experience of the past 12 months, and the user's feedback, the team will extend the process of booking a tank container in 2018. The platform is therefore growing from an online matching system to a booking platform.

'The base line for this comes from our experience. We have so far satisfied demand for over 5,000 tank containers, which is the booking equivalent of over 10 million dollars', Léon De Bruin explains.

But to become a full operating booking platform, there is a need for financial transactions. This will require several changes to the automation processes. 'At the moment, our actions are partly



Léon De Bruin and Arthur van der Hoeven: 'We grow every day because of new and more active platform users'

free as it comes to booking. This will change in a couple of months. New users will have a free booking service as a testing model but, when they register for permanent use, we will charge a fee for every booking. On the other hand, we will support every customer in the transition period from match making to booking by Wilbert de Jong'.

## New plans

The purpose of the TankContainerFinder.com-team is to optimise the worldwide tank container supply chain. 'No one needs to put time or effort in the search for a tank container at the right location and just in time', De Jong states.

The complete logistics management by TankContainerFinder.com – which effectively unburdens the parties involved - is only possible when all parties participate. 'Therefore, we talk with all the companies and experts', De Bruin says.

'The cooperation with Intermodal Telematics (IMT) is an example. They are the leaders in developing telematics for tank containers and we know users want smart tank containers to inform them constantly about location and conditions during transport. This gives them the opportunity to respond to calamities. We will add all kinds of services that we can find to help in

the process of unburdening'.

In 2017, TankContainerFinder.com received a Green Supply Chain Award and were nominated for the Accenture Innovation Awards in the Circular Economy, as well as Seamless Travel and Transport. This year, the company was nominated for the Accenture Innovation Award in Mobility. De Bruin is proud of winning the first NT Port Start-Up Award and honoured to be nominated for the Supply Chain Startup Award Europe 2018."

He ends the story this way: 'These nominations, of course, are an excellent appraisal for all efforts to innovate the tank container supply chain. The positive feedback from our users, as well as from the entire market, is encouraging and we regard it as a validation of our strategy. The liquidity at the platform rises day by day as new users enter and liquidity is increased by parties generating businesses for themselves. We expect this year to satisfy over 1,000 demands for tank containers and will have negotiation of over 10,000 tank containers at the platform. The figures are published on our homepage'.

Everyone who is interested in using TankContainerFinder.com can register free-of-charge on the website. Click on the "Chat" button to have immediate contact to Wilbert De Jong.



# Will there be new tank container lessors?

Editor Leslie McCune continues his analysis of the leasing sector, using a well known competitiveness model

In the last issue of *Tankcontainer Magazine*, we introduced Porter's well-known 'Five Forces' model for analysing the attractiveness and likely profitability of the tank container leasing industry.

Professor Michael Porter is a Harvard-based academic with a worldwide reputation as one of the foremost authorities on the global competitiveness of industries. He is the author of a compendium of books and articles on competitive strategy and competitive advantage and is said to be the most cited author in business and economics.

Porter's so-called 'Five Forces' model is a simple but powerful way of understanding the competitiveness of an industry sector, and for identifying the potential profitability of a company's strategy. It has become one of the most popular and highly regarded business strategy tools and, along with the ubiquitous SWOT (Strengths Weaknesses Threats Opportunities) analysis, has become an essential market analysis tool in most company board rooms.

The model recognises that tank container lessors keep a close watch on their rivals, but it encourages them to look beyond the actions of their competitors and examine what other factors could impact the business environment. It identified five forces that make up the competitive intensity of a

market - these can either erode or enhance the profitability of a company operating within the market. The five forces are:

- Force 1: Threat of new entrants
- Force 2: Bargaining power of buyers
- Force 3: Threat of substitute products or services
- Force 4: Bargaining power of suppliers
- Force 5: Rivalry among existing competitors



In March's issue of *Tankcontainer Magazine*, we analysed the threat of new entrants into the tank container leasing sector and concluded that, while there are no strong and durable barriers to entry into the tank container leasing market, the **THREAT OF NEW ENTRANTS** is **LOW**.

## Force 2

We now consider Force 2, the bargaining power of buyers i.e. the customers of tank container lessors, such as tank container operators and freight forwarders.

This force explores how easy it is for buyers to impact the leasing day rates for tank containers. The key drivers are the number of customers in the market, the size of their orders, and the cost and ease with which they can switch from one lessor to another. How easy is it, therefore, for buyers of leased tank containers to dictate terms to lessors?

When there is only a limited number of large customers in the market, buyers will have more power over lessors. Conversely, the power of a lessor increases if, as now, customers are numerous and highly fragmented.

Today, the bargaining power of customers looking to lease tank containers is **STRONG** because:

- there are many possible suppliers of leased tank containers, despite the consolidation between some majors in recent years bringing the market share of the top lessors to nearly 70 per cent. New lessors such as Albatross (Sinochem International Logistics) and GEM (now owned by venture capitalist, Rampart) have emerged while some, such as CS Leasing, have been created by box container companies seeking the greater rewards and relative stability of the tank container sector. Seed and growth capital are still easily available, and at low rates.

- switching costs between the various suppliers are low and it is

relatively easy to switch between tank container lessors.

- one of the larger groups of customers - chemical companies - do not have to lease tank containers. Instead, they can either buy tank containers to operate themselves or outsource their tank container logistics to an operator, using the tank containers purchased by the chemical company or using the operator's own equipment.

- the largest group of customers - tank container operators - is expanding and the leading operators have bigger fleets. Should operators decide to lease-in tank containers to meet specialist needs or incremental demand, as the market leader Stolt Tank Containers has said it will do, their purchasing power over lessors will become greater than in the past.

- European tank container operators, many of which are still family-owned, prefer to own their own tank containers and have the financial strength to leverage their favourable credit facilities rather than resort to more expensive outside financing.

- tank containers are freely available and the global fleet is relatively standardised, with the clear majority being T11s. The ability of T11s to carry most products increases the bargaining power of customers which are considering leasing a tank container.

- there is a very low incidence of tank containers undergoing catastrophic failure, which encourages customers of lessors to purchase tank containers themselves.

- tank container leasing creates the market liquidity from which customers benefit.

- tank container manufacturers have plenty of spare capacity and delivery times for most types of tank containers are short. Urgent demands can therefore be met by the manufacturer, rather than by a lessor.

Conversely, the bargaining power of companies looking to lease tank containers is WEAK because:

- fewer chemical companies are committed to owning tank container assets, preferring to outsource their requirements to specialist, external providers of logistic assets such as tank container operators.

- many chemical companies are under pressure to reduce capital expenditure. Leasing tank containers offers a route to convert the capital tied up in the asset into a fully tax-deductible operating expense. Tank containers that were ordinarily purchased through capital expenditure can therefore have their cost re-assigned to an operating expense. This financial restructuring is a particularly financially attractive option if the company has limited cash flow.

- when tank containers are urgently required, especially if they are specialised tank containers, the bargaining power of customers is weak.

- the market is highly fragmented - no company leasing tank containers is, by themselves, capable of influencing lease day rates.

- the bargaining power of companies looking to lease tank containers is weakened by the disinclination of tank container operators and chemical companies to become lessors. This limits the number of supplier alternatives for leased tank containers.

- customers have weak bargaining power because tank containers provide an essential logistics service for them. There are no intermodal alternatives for the carriage of small lot size bulk hazardous liquids.

## Conclusion

The above analysis indicates that THE BARGAINING POWER of CUSTOMERS (i.e. companies looking to lease tank containers) is MEDIUM. Their inability to drive prices down - because of their small

size relative to that of the lessors, and their occasional need for specialised units - is offset by the fundamental over-supply of tank containers available for lease.

In the next issue, we look at the remaining three forces that shape industry competition. These are the threat of substitute products for leased tank containers, the bargaining power of suppliers (i.e. tank container manufacturers) and the rivalry among existing tank container leasing competitors.

Force 3 - the Threat of Substitution - refers to the likelihood of customers finding different ways of providing what a tank container lessor currently delivers. Leased tanks, for example, can be replaced by simply purchasing tank containers, by moving back into drums or by increasing the lot size to that offered by chemical parcel tankers. A substitution that is cheap and easy to make weakens the position of lessors and threatens their profitability.

Force 4 - Supplier Power - is determined by how easy it is for tank container manufacturers to increase their prices. How many potential manufacturers are there? How genuinely unique are their tank containers and how expensive is it to switch between manufacturers? The greater the choice, the easier it is to switch to a cheaper alternative. However, the fewer manufacturers there are - and the more you need them - the stronger is their position and their ability to charge more, which impacts the profit of lessors.

Force 5 - Competitive Rivalry - looks at the number and strength of the lessors. How many rivals are there? Who are they and how does the quality of their products and services compare?

Where rivalry is intense, lessors can attract customers - temporarily, at least - with aggressive price cuts. Conversely, if competition among lessors is minimal, they are likely to have healthy profits.



# Synergies of success

Two companies, thousands of kilometres apart, have come together to cooperate. Just don't call it a joint venture, writes James Graham

A "synergy" is the interaction or cooperation of two or more organisations, substances, or other agents, to produce a combined effect greater than the sum of their separate parts. It also neatly describes the formal teaming up between Friedrichshafen, Germany-based coating application company HÜNI+CO and Dubai-based tank container depot Joint Tank Services (JTS).

It is the latest in a range of cooperative deals between HÜNI+CO and other relevant suppliers in the tank container supply and coatings applications field.

According to executive board member Alexa Hüni, who has headed the family-owned business together with her father Peter since 2016, the arrangement with Joint Tank Services offers a tank container repair shop to tank container customers in the GCC (Gulf Cooperation Council, whose members are Saudi Arabia, UAE, Qatar, Kuwait, Oman, Bahrain). The move was taken in response to the increasing demand for repair services of internal ISO tank container coatings.

When asked by *Tankcontainer Magazine* how it is going, she was positive: "So far, so good! We do have a formal agreement of our co-operation. I would not call it a joint venture. It is a cooperation with the goal to provide a great service to our common customers when it comes to smaller repairs to the internal



*Meeting of minds: German industry works with Dubai-based container depot in a formal teaming up*

coating of ISO tank containers."

## Meeting of minds

Two companies in two countries - many kilometres apart - have formed this cooperation as a result of a meeting of minds, reveals Hüni.

She says: "We (HÜNI+CO) first met JTS during the ITCO meeting in Dubai in late 2016. Since then, we have been in regular contact. In November 2017, two JTS staff members came to our site in Friedrichshafen for two days of intensive training and now we have launched our co-operation.

"JTS as a tank container depot and HÜNI+CO as an application company have, on the whole, the same customers." JTS provides maintenance, service and repairs for ISO tank containers while

HÜNI+CO specialises in internal tank container linings (with ChemLine 784/32 or Proco-EMAIL, black for example).

She adds: "We do have a lot of common customers to whom we want to provide a new service when it comes to repairs to the coatings. Although the coating is pretty robust - we see tank containers in the field that run with the same coating from HÜNI+CO for 10 years or even longer - it may happen that during the inspection in the depot a mechanical damage within the coating appears.

"Until today the solution is to take the tank container out of service and send it to Friedrichshafen to have it repaired at HÜNI+CO. Now JTS has the possibility to communicate with

us, to exchange pictures and information and - of course - to conduct a repair to the coating - ChemLine 784/32 and Proco-EMAIL, black - up to a size of 10 x 10cm on their own.

"We aim to offer the best service to our worldwide customers by minimising unnecessary downtimes for tank containers."

### Mutual benefit

Understandably, it would be surprising if both sides did not benefit from cooperation between the two companies. Hüni is emphatic that both sides will get something out of working together.

When asked by Tankcontainer Magazine what HÜNI+CO is getting out of it, she says: "An extended service to our customers."

Likewise she is confident that JTS will benefit equally from the cooperation. The Dubai-based company will enjoy "an extended service to their customers."

At the same time, JTS is undergoing and expansion of its own in Oman, where it is in the process of developing a new depot in Sohar Port Free Zone on 20,000 sq m of land. The tailor-made facility will be dedicated to cleaning, storage, repairs and support services for tank containers in line with the growth of the country's petrochemical industry.

With the new facility in Sohar, JTS plans not only to consolidate existing services to the tank container industry but also to expand its portfolio in the future by developing business offerings directly to the chemical industry. This may include areas such as chemical drumming, warehousing and distribution as the rapidly-developing petrochemical industry grows in Sohar.

Construction of the new Sohar facility is expected to start during the second quarter of 2018,



JTS staff at HÜNI+CO

subject to approval from the relevant authorities in Oman, and trial operations should start during the first quarter of 2019.

Hüni is confident the new Omani development will only benefit JTS. She says: "It does not affect our collaboration with JTS, but I think it is a good development of JTS' portfolio. Of course, expanding into Oman is also very interesting with regard to repairs."

Despite being thousands of kilometres away from each other, executives from both companies have made it a point to visit each other's locations and liaise using conference calls, Instagram and Skype. This is very important to Hüni.

She says: "We have both visited each other. Recently Peter Hüni has been to Dubai and we both have very good impressions of each other's companies. From the start, we realised that we do have a very similar business approach and share the same values when it comes to quality, safety and customer orientation."

Peter Hüni points out that it is sometimes length of service that can determine whether a tank container can be repaired or scrapped.

"Most of the tank containers coated by us have been effectively in use over a decade or more. Problems however occur

particularly in-service depots, during the cleaning or maintenance process" says Peter Hüni. "Our linings are highly resistant against transported chemicals, but can't withstand the mechanical stress the tanks are exposed to when cleaned, which inevitably affects the lining. A thorough repair is thus indispensable."

Deposited tank containers showing lining damage are immediately withdrawn from service and sent to HÜNI+CO in Friedrichshafen, or to one of the HÜNI+CO accredited depots in Europe.

### Co-operation

The co-operation between HÜNI+CO and JTS is not the first that the German company has instigated, reveals Alexa Hüni. She says: "We already have similar cooperation for the repairs of tank container coating with other companies, for instance, with COTAC in Dormagen, Antwerp and Rotterdam and with GETS/Van Loon Group in Antwerp. Currently, we are planning to create a whole concept for "TC (Tank Container) repair shops" approved by HÜNI + CO. "In this context we are currently engaged in discussions with a company from India and also with a company located in Hamburg."



# Collaborating for growth

The 10th GPCA Supply Chain conference took place in Dubai last month with the theme being 'Collaboration for growth: A cultural transformation'.

The event covered a wide range of topics ranging from current global trends, technology disruption, business optimisation and procurement.

Recent studies suggest that more than 80 per cent of organisations globally agree that increasing collaboration with internal and external stakeholders drives bottom line results and reduces supply chain costs.

Conference speakers identified collaboration as a key driver of growth and business transformation, as well as a route to cost efficiencies and reduced supply chain disruption. Collaboration also plays an important part in risk mitigation and has implications for business continuity.

With over 83 per cent of GCC petrochemical output destined for export to over 100 countries worldwide, the industry has the longest global supply chain, making supply chain efficiency a crucial factor for maintaining the region's competitive advantage. Cost optimisation is particularly important as the average cost of GCC chemical supply chains represents about 30 per cent of landed product prices. Supply chain costs therefore have a major impact on the bottom line of chemical companies.

Chemical demand growth will come from Asia

In a keynote speech, Mohammed Al Muallem, the CEO and Managing Director of DP World's UAE region and the CEO of Jebel Ali Free Zone Authority (JAFZA), outlined the importance of collaboration to face up to

future challenges and the ever-increasing demand from key export markets. JAFZA is the GCC's leading logistics hub and hosts 526 chemical sector companies. In his speech,

Mohammed Al Muallem said: "The largest demand growth will come from Asia, which will account for 60 per cent of the middle class globally and 40 per cent of the total global demand for chemicals. With global supply chains becoming increasingly complex and diverse, the need is increased value and efficiencies underpinned by effective cross-stakeholder collaboration."

Abu Dhabi-based Borouge's innovative activities in supply chain and strategic partnerships with key logistics services providers were highlighted as being instrumental in improving the company's supply chain.

## Driving growth

"Collaboration in supply chain activities across the value chain plays a significant role in ensuring business continuity and driving the growth of the industry," said Ahmed Al Katheeri, Acting Senior Vice President Supply Chain Management at Borouge.

Dr Antonie Potgieter, Vice President Centre of Excellence at Borouge, highlighted the importance of establishing partnerships with the industry value chain to facilitate and improve supply chain operations to ensure better results in products delivery.

Dr Robert de Souza, Executive Director and CEO of The Logistics Institute - Asia Pacific, noted that risk management will be key to predicting future challenges and ensuring the robustness and resilience of the region's supply chain industry.

RSA-Talke opened their logistics sites in Jebel Free Zone and Dubai World Central to students as part of an organised visit.

Dr Abdulwahab Al Sadoun, Secretary General of the GPCA, noted: "With the chemicals industry being export-oriented, the supply chain is an integral element of its operations. The success of the Arabian Gulf chemicals industry is underpinned by effective supply chain management, which has a direct impact on its profitability. Increasing collaboration with internal and external stakeholders can drive bottom-line results and reduce the risks and costs of supply chain functions."

According to Drewry, global chemical trade was 231 million tonnes in 2016, an increase of 35 million tonnes from 196 million tonnes in 2010, representing compound annual growth of 5.1 per cent.

Tonne-mile demand increased by 2.1 per cent a year between 2010 and 2016. Organic chemicals accounted for nearly half of global chemical trade followed by vegetable oil and inorganic chemicals with methanol, paraxylene and monoethylene glycol being the largest organic commodities traded worldwide.

The Middle East is the top exporting region, with an export volume of 14.3 million tonnes of chemicals in 2016. However, the region is primarily an importer of packaged products moved in shipping containers. The largest shipping route serving the GCC (the Middle East-Gulf-Far East route) discharges 5.8 million TEUs in Middle East ports but only 1.8 million TEU are loaded. This implies a surplus of empty containers of about 3.4 million TEU.



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# Innova: Jebel Ali bound

Innova opened its first tank container cleaning depot in Sharjah, UAE in 2014. Now it is expanding as part of a \$2.7m move to Jebel Ali. Felicity Landon reports



This summer, Innova Tank Cleaning Services LLC will open a brand new AED10 million (\$2.7 million) tank cleaning depot at Jebel Ali in Dubai, UAE.

The construction of this new facility, described as an 'advanced cleaning technology depot', represents a step change for the Innova Group, which was established in 2010 and is the owner and operator of a major petrochemical complex in the Hamriya Free Zone, in Sharjah.

Innova has decided to close its original tank cleaning depot, which was opened four years ago in Sharjah, in favour of a move to Jebel Ali. Overall, this is an expansion for Innova, says depot manager Sunilkumar Mecheril, and once the Jebel Ali depot is fully

commissioned, the Sharjah facility will close.

"The Sharjah depot covers 7,500 square metres and cleans 350 tanks per month; the new depot in Jebel Ali will be 10,000 square metres and will have the capacity to clean more than 550 tanks per month," he says.

Why is the Jebel Ali depot needed? "As a part of expanding our business and concentrating on the main hub of tank movement," he says.

"Out of Jebel Ali, we will be the only player that has its own depot and its own fleet of tank containers.

"As UAE is developing as the chemical business hub of this region, ISO tank containers have a vital role in this scenario. Our fully

fledged depot, with highly skilled personnel, will be a key part of our business mantra."

## Origins

Innova was set up in 2010 as a trading firm dealing in petroleum and petrochemicals in the GCC. It subsequently moved into the manufacturing of various petrochemical products. The group focuses on logistics, terminal operations, trading and tank container maintenance services; it operates storage terminals and processing plants and a fleet of road tankers, and leases 2,000 tank containers for the transport of chemical products, lubricants and other products to various countries.

Innova's tank cleaning depot



# 8<sup>th</sup> China 2018 TANK CONTAINER LOGISTICS FORUM

September Shanghai · China

## Green Logistics, Common Development

### Event Background

8<sup>th</sup> China Tank Container Logistics Forum 2018, organized by Enmore, will be held in September in Shanghai, China, gathering hundreds of chemicals logistics industry professionals, holding in-depth discussion on latest market trend, and seizing new business opportunities.

### Who Will Attend

#### By Industries

- 30%** Cargo Owners
- 35%** Logistics provider
- 10%** Leasing company
- 10%** Tank manufacturer
- 8%** Accessories Provider
- 7%** Third party



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cleans the parent company's tank containers and also provides services to third party customers.

"We use innovative machines and technology for cleaning the tanks and work in two shifts, 6am to 2pm and 2pm to 9pm," says Mecheril.

Construction of the Jebel Ali depot is 80 per cent completed and commissioning is planned from the end of June. It will be equipped with a tank cleaning system with six pumps, providing 8,280 LPH (litres per hour) capacity, power of 40 kW and a chemical dosing system based on two units. All the equipment has been supplied by Germany's Weidner.

As well as tank cleaning, the Jebel Ali facility will provide the full range of logistics and other services provided by Innova at Sharjah. That includes cleaning of chemical/food grade tank containers, of baffle and multi-compartment road tankers, and of IBC stainless steel Liquitotes, tank storage, local transportation by road, and tank repairs, testing and certification.

#### Tank container repairs

"As at Sharjah presently, we will also provide tank repairs," says Mecheril. "That will include frame structure and welding repairs, cladding and insulation repairs, tank shell treatment – polishing, passivation and grinding – and tank modification and refurbishment, as well as X-ray/dye penetrant testing and air/hydro testing of tanks.

"We will have emergency response onsite, and also provide tank inspection services and surveys for tanks whether on-hire or off-hire."

Tank cleaning and maintenance has become an integral part of Innova's operations, he explains. "It has become even more prevalent with the increase in, and importance of, two-way system hauling, where between-loads



*Managing Director Joy Arakkal*

cleaning is always required.

A total of 20 technicians and operators will be employed at the new depot, says Mecheril, and extensive training has already been completed.

"The staff have been through a tank operators course run by Roy Boneham, IMDG Code training with Joy Victor, and first aid and basic firefighting through our internal skills development programme."

Innova's customers include Daelim Corporation, Deccan Transcon Leasing, JNC Singapore Lines, Merlion Singapore, Fusion Specialized Shipping & Logistics, Sun Logistics, Bulk Oil & Liquid Transport (BOLT), United Africa Feeder Lines UAE, BVM Transport, Creek General Transport, the APAR Group of companies, ALS Clarion, Hoover Fergusson, ECON Shipping and Ravian Shipping.

Innova is looking to stand out from the competition in the tank cleaning services it offers, says Mecheril.

"Our main aim is to be a market leader in the region, delivering comprehensive integrated ISO tank container depot solutions to our customers and industry players with operational excellence.

"We are open 24 hours, we can release tanks around the clock and we focus on being very customer friendly. Our offer is total support for the customer. Depot in/out activity will work on a 24/7 basis to ensure 100 per cent customer satisfaction.

"As to depot operational activity, we are planning for up to

16 hours per day. The German technology we have specified will ensure the best cleaning quality assurance for ISO tank containers."

The terminal will be equipped with Hyster ISO tank container handlers capable of double-lifts, operating up to six-high and with a nine-tonne lift capacity.

Meanwhile, the group's environmental commitments are also critical to the business model, says Mecheril.

The Hamriya petrochemical complex was designed around the concept of zero generation of waste and includes processes to eliminate wastage. It has waste water treatment plants and air emission controls with no flaring from the chimneys.

#### Recycling

Similarly, the tank cleaning depot does not dispose of any chemicals – all residues are collected and sent to the refinery for recycling.

"We are reprocessing and recycling the chemical waste in our refinery," he says. "That is really important for us."

The nearest seaport to the new depot is, of course, Jebel Ali Port – DP World's flagship facility and the largest marine terminal in the Middle East. The port plays a vital role in the UAE economy, handling more than 90 weekly container services connecting more than 140 ports around the world. The road connection between the port and Innova's depot are good, says Mecheril, and the 25 kilometre drive can be completed in less than 25 minutes.

There is also room for expansion and it is possible that Innova will open another tank cleaning depot in the region to meet demand, says Mecheril.

"With EXPO2020 at Dubai already nearby, expansion may well be required, due to the huge, and increasing, demand for chemicals transportation in the region."



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#### Project examples:

- Commissioned by the Gulf Petrochemicals and Chemicals Association (GPCA) to produce the seminal study of the Middle East petrochemical supply chain
- Produced the world study of the tank container market and players
- Identified Middle East partners for world leading tank container operators and leasing companies
- Identified tank container acquisition targets
- Produce the quarterly 'Middle East Tank Container Market Review'

Leslie McCune, Chemical Management Resources Limited

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# When you need to be sure

## SGS, ABS and GTIS collaborate to create a global tank container inspection player

In May, SGS – world leader in inspection service - announced that it would collaborate with ABS (American Bureau of Shipping) and

Gold Tank Inspection Service, Inc. "With this (collaboration) we can now offer worldwide inspections, making us stronger in a very competitive market," says Jarno Weps, supervisor Tank & Container Services at SGS in Spijkenisse, near Rotterdam in the Netherlands. In Europe, SGS Tank & Container Services was already a major service provider to the sector.

SGS had been looking for a partnership to expand its footprint outside Europe and into other regions, such as Asia and the US. Weps says: "We found a partnership with ABS, which has a strong position in Asia as well as in the US and, by collaborating with Gold Tank Inspection Service, we can now offer shipping container inspections in all these regions."

Gold Tank Inspection Service, Inc - an American company - already had a strong presence in the US and Asia but, at the same time, was looking for a partner in Europe.

The combination of SGS with ABS and Gold Tank Inspection Service now creates a strong global player in the field of tank container statutory and non-statutory inspections.

With 2,400 offices, SGS is the world's leading inspection, testing, verification and certification company. The company employs 95,000 people, is divided into nine business lines and offers services in all major industries.



Being close to a major global petrochemical hub, the Rotterdam branch has a large Tank & Container Services department, where Weps has been the supervisor since January 2016.

SGS was founded in 1878 in Rouen, France as Société Générale de Surveillance. It originally controlled the volume and quality of grain stocks and the company moved to Switzerland in 1914. Today, the Geneva-based company is simply known as SGS S.A.

SGS expanded its activities from agriculture to a multitude of sectors and is now active in a wide range of inspection, verification, testing and certification services related to products, systems and processes. Its focus on quality is mirrored in the company motto: "When you need to be sure".

According to Weps, the focus of

SGS Tank & Container Services is mainly on the on- and off-hire service (including off-hire estimate verification) for various tank container leasing companies.

Weps says: "If the container goes to a customer, we will provide a report on its state to that customer. When the tank container returns, we inspect and check if damages are filled in and have been completed truthfully. As an independent party, we mediate in the fair distribution of costs between owner and customer."

For the past ten years, SGS has been carrying out periodic inspections for tank containers.

The value of SGS to the tripartite collaborative arrangement is the wide-ranging inspection services that can be offered for bulk liquids and refrigerated cargoes. ABS has been at the forefront of marine

and offshore energy innovation for more than 150 years and Gold Tank Inspection Service specialises in the inspection of tank containers (or portable tanks, to use the US terminology).

Weps says: "SGS finds its strength in its diverse service portfolio: we work across many industries. For example: we can detect welding seams by taking x-rays of a tank wall, as well as doing the repair works. We can also take cargo samples, worldwide, because we have a network of 2,400 branches and laboratories all over the world".

In addition, SGS Tank & Container Services offers a wide range of other services. "All our surveyors are certified to be able to carry out a variety of measurements, including gas measurements, dew-point

measurements of the humidity in the tank after nitrogen flushing, oxygen measurements and gas release statements.

"We have a specific location in the Moerdijk industrial estate where rail wagons are issued with cleanliness declarations," says Weps.

The company has short lines of communication with customers such that, if a customer comes up with a specific question, they can quickly be put in contact with the right people within SGS.

"We work with our customers to ensure that there are no problems with the use of tank containers so they must be able to rely on the fact that our services are well-organised. Together with ABS and GTIS, we are now established worldwide in the tank container market," says Weps.

Due to the collaboration between US-based ABS and Gold Tank Inspection Service, SGS now is service provider of contact in Europe.

SGS believes it is able to add more services for tank container customers and, together with ABS and GTIS, is looking towards more tailored and trustworthy solutions for the industry. The first step in the direction of this goal has been the creation of a fully-integrated service portfolio, offering accredited inspection services in Europe, the Americas and Asia.

The extensive experience and trustworthiness of each of the three parties will contribute to raised levels of business excellence as they aim to tackle all the challenges facing the industry in the safest, most secure and most responsible way.

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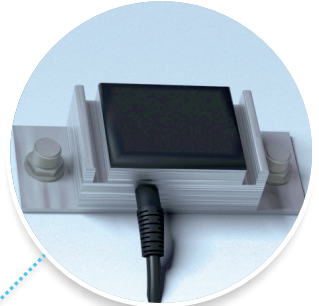
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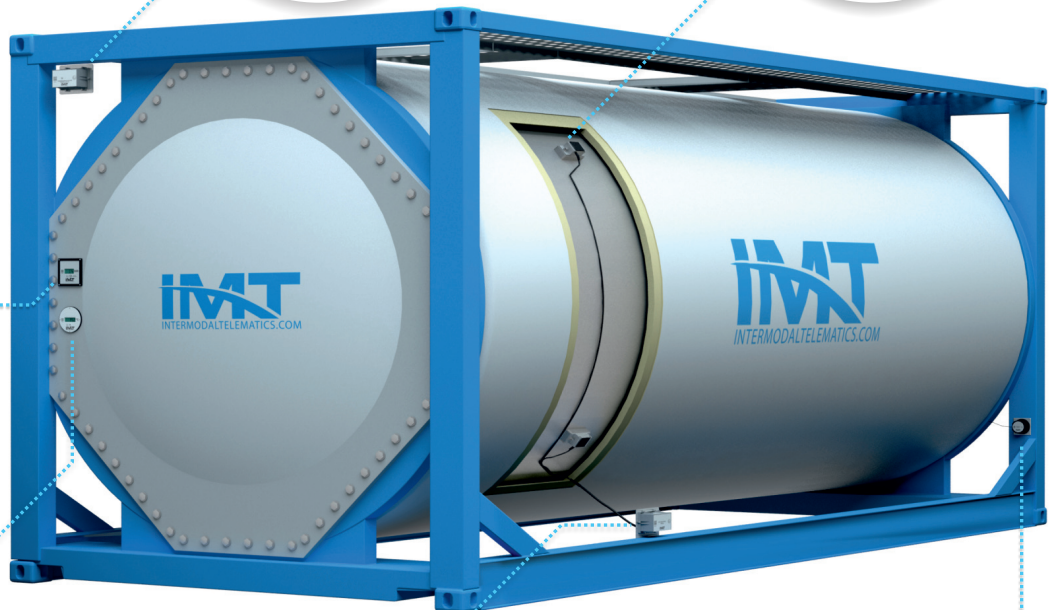
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