

MARKET

Is the tank container market overly-concentrated? We calculate a key metric of competitiveness.

P22

DEPOT

With full depots in Germany CONDACO is looking for geographic expansion.

P40

OPERATOR

Fast-growing E-WAY/ITM's ambition is to be a Top 5 global operator.

P49

ORGANISATION

The Tank Container Development Alliance outlines its role and the trends in China.

P53

Volume 12 | Issue 2 | June 2025

Tankcontainer

MAGAZINE



Telematics key to operational transformation

The insights of Dethmer Drenth, Managing Director and founder of Intermodal Telematics

Dethmer Drenth,
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Leslie McCune, Editor

3



Tariffs, trade and tonics



In the angry, tribal world of football, "No one likes us, we don't care" is a chant from the terraces of

a well-known club, famed for its aggressive bullying tactics. In what has become the angry, tribal world of geopolitics, a similar sentiment seems to echo. Love it or loathe it, the one certainty in what has become a **much more uncertain world** is that the trade and transport flows routes on which tank containers depend will be impacted - positively and negatively - in the unlikely event of recent policy decisions by the world's two leading economies becoming the new basis for business.

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COVER FEATURE

Telematics key to operational transformation.
The insights of Dethmer Drenth, Managing Director and founder of Intermodal Telematics **18**

NEWS

5-13

REVIEW



A decade ago - happy days?
A quick reflection on how the industry has grown over the past 10 years. **22**

OPERATOR



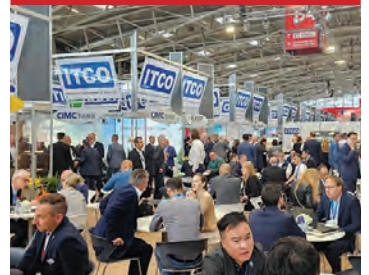
TGL leverages Turkey's role as logistics hub. TET Global Logistics expands reach offering thanks to commitment to quality. **27**

MARKET



Is the tank container market overly-concentrated? We compare competitiveness of lessors and operators in the industry. **30**

EXHIBITION



ITCO Tank Container Village
At transport logistic 2025, Munich. **36**

DEPOT



CONDACO CEO Dantz stays optimistic, navigating Germany's tank market. Thorsten Dantz channelling his inner emotions. **40**

EQUIPMENT



BRIANZA PLASTICA: The Widest Range Of GRP Laminates For Tanks. Join us at transport logistic **46**

OPERATOR



E-WAY/ITM aims to be a Top 5 operator. Jeroen Govers talks about digitalisation, investment and emergence of new cargo flows. **49**

ORGANISATION



The Tank Container Development Alliance. TCDA outlines its role and the trends in China. **53**

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Tariffs, trade *and* tonics

In the angry, tribal world of football, “No one likes us, we don’t care” is a chant from the terraces of a well-known club, famed for its aggressive bullying tactics. In what has become the angry, tribal world of geopolitics, a similar sentiment seems to echo. Love it or loathe it, the one certainty in what has become a **much more uncertain world** is that the trade and transport flows on which tank containers depend will be impacted - positively and negatively - in the unlikely event of recent policy decisions by the world’s two leading economies becoming the new basis for business.

The new tariff environment will cause a buildup of inventories pre-imposition, reduced volumes post-imposition, a redirection of some deep sea trade flows and increased operational costs for ocean carriers. The biggest trade war in a century that is currently playing out is inevitably **delaying business investment plans**. However, the inevitable damage that tariffs do to the prospects for global growth GDP are partially offset by a lower inflation outlook, at the global level. Closer to home, uncertainty and disruption are friends of the tank container industry, given their ability to provide temporary storage and flexible transportation options. Troubled times may be a timely tonic for tank container profitability.

At the most simplistic level, one effect of **retaliatory tariffs** between the US and China - in the unlikely event they become permanent at today’s levels - is to encourage domestic production. That may be easier to do for food grade products, where substitutes and alternatives are more commonly available, than for specialty chemicals, which rely on intricate and integrated production processes. Many of these are based on naphtha-based petrochemical raw materials that are only commonly available in Europe, China and the Middle East.

China is by far the **largest chemical market** in the world - at \$2.5 billion, nearly twice the size of the US and Europe combined - and maintains its global leadership position in the narrower specialty chemicals market, which relies heavily on tank containers for distribution and storage. If any major markets are made unviable by tariffs, China will simply look to export any surplus bulk liquid specialty chemical production elsewhere and stimulate local consumption. However, while many state-owned enterprises have been successful in developing basic chemicals, fewer are well positioned to produce the specialty chemicals needed for China’s economic development, not least because they often depend on intellectual property and licenses that are not always made available.

All in all, there must be some nerves in Zhongnanhai, the government compound in Beijing, but what has become clear is

that the US has become an engine of **global instability**. It is still not clear if tariffs are a part of a long-term protectionist reorientation of the US economy to fund Trumpian tax cuts or a short to medium-term negotiation tool to ‘cut deals’.

Of more immediate consequence may be the **disruption to shipping** caused by either tariffs or the new port fees of \$120 per container to be imposed by US authorities on Chinese ships from October. Disruption is, of course, generally good news for the tank container industry as freight rates, on which operators make a margin, rise and demand increases due to longer tank rotations. The huge amount of extra effort required by operators and lessors to satisfy tank container customers during these turbulent times is generally rewarded in the end-year company financials.

These topics will be the subject of much discussion when the industry meets at **transport logistic** in Munich in June. Making sense of the chaotic policy process is one thing; understanding its implications is another but that is the challenge for the industry. Fortunately, the tank container sector will be among the first to see the real world implications of the recent volatility as our main customers - chemical and food grade producers - discuss their changed requirements based on the views of their customers in the new world trading environment.

An article on the **competitiveness of the tank container market** (Page 30) may seem, on the face of it, a futile exercise in analysis when, at the stroke of an executive order, on/off tariffs can set in motion a decline, stimulus or diversion in the pattern of global trade flows. Indeed, the whole objective of tariffs is to distort and divert trade flows.

However, a competitive market is, by definition, a more flexible one and the more flexible it is, the greater is its ability to meet the changing needs of customers. We consider if the tank container market is overly-concentrated and compare the competitiveness of lessors, operators and manufacturers in the tank container industry with the ocean container shipping sector.

The Art of the Deal was written by Donald Trump in 1987; The Art of the Steal is apparently behind today’s tariff turmoil but the most important read for the tank container industry is the Art of the Real i.e. what are the real world business opportunities and threats of the new tariff regimes. It will have not one, but many, authors. ■

We look forward to catching up with everyone in Munich in June.

Leslie McCune, Editor

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Chane Terminal Marseille brings new flexibility to storage with ISO tank



Chane Terminal Marseille has taken a bold step in a traditionally conventional market by launching its new ISO tank platform. Strategically located between the Marseille and Fos-sur-Mer container terminals, the facility has been operational for a year and a half and is now prepared to support new customers with safe, reliable, and efficient storage solutions.

Sales engineer Aurélien Jakalski further explained the benefits of ISO tank containers, emphasising their multimodal capabilities: "ISO tank containers can be transported via road, rail, or sea and stored without the need to transfer the product to other vessels or even open the container. We firmly believe in the significant value our ISO tank platform, combined with our regular tanks, can bring to customers. We're seeing strong interest from the market."

Chane Terminal Marseille offers a unique solution in the region, with the ability to store raw materials, finished products, waste, and goods under customs control, including excise-duty-regulated items such as alcohol and fuel. Jakalski noted that safety remains a key differentiator: "There are no other ISO tank service providers in the south of France that offer this level of security. Currently, some ISO tank users in the region are storing their products in non-authorised and unregulated

locations, posing significant safety and financial risks. As a Seveso-classified site, Chane Terminal Marseille adheres to the highest safety standards. In the year and a half since opening, the ISO tank platform has recorded zero safety incidents."

Another advantage of the facility is its strong connectivity. Jakalski explained: "Our platform is connected to the railway network and is located near the industrial clusters of Berre-L'Etang, Fos-sur-Mer, and Lavera. This allows us to support multimodal logistics, giving customers access to multiple and more sustainable transportation options."

Chane Terminal Marseille continues to engage with both current and potential customers, encouraging them to consider the broader possibilities of storage solutions. Fischer added, "We tell them: think beyond the possibilities of just tanks or just ISO tanks. Both offer distinct advantages, and combining them can be a valuable addition to logistics chains. Right now, we are working to develop that awareness and introduce this innovative solution to the bulk storage market in the south of France."

With its forward-thinking approach, Chane Terminal Marseille is setting a new standard for flexible, secure, and sustainable storage solutions, reinforcing its position as a key player in the region's logistics sector. ■

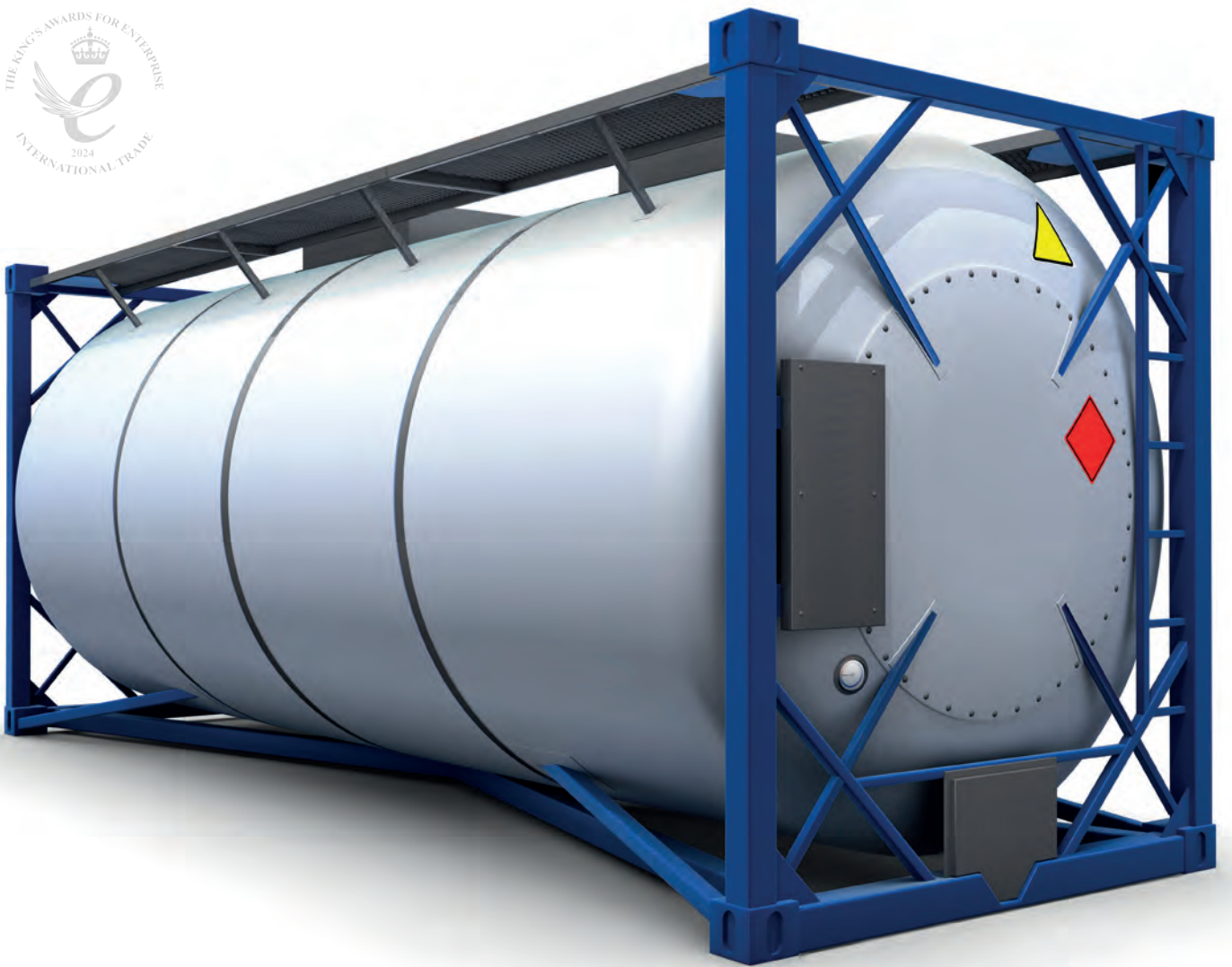
Falcon Lease a awarded silver sustainability rating by EcoVadis for second consecutive year

Falcon Lease has been awarded a Silver Sustainability Rating from EcoVadis for the second year in a row, reflecting its ongoing commitment to sustainability and responsible business practices.

This recognition highlights Falcon Lease's dedication to continuous improvement in environmental, social, and governance performance. While acknowledging that there is still much to learn, the company remains focused on integrating sustainability intelligence into every business decision.

By maintaining this Silver rating, Falcon Lease reinforces its commitment to fostering a more sustainable future within the ISO Tank leasing sector. The company continues to explore new ways to enhance its sustainability efforts, ensuring that responsible practices remain at the core of its operations. ■





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HOYER Group grows in Latin America: acquisition of Chilean INTER-TANK and new office in Colombia

The HOYER Group, a leading global provider of logistics solutions for the liquid bulk industry, announces the acquisition of the Chilean company INTER-TANK. With this strategic acquisition, the HOYER Group strengthens its market presence in Chile, its global network, and its capabilities in the liquid bulk and flexitank logistics sector.

INTER-TANK, based in Santiago de Chile, is a renowned provider of Flexitank logistics solutions in South America. This acquisition will significantly expand the regional presence of HOYER, and will offer more comprehensive and efficient logistics solutions to its customers.

"The acquisition of INTER-TANK is a crucial step for the HOYER Group to expand our global network and solidify our position as a global flexitank logistics provider," said Björn Schniederkötter, chief executive officer of the HOYER Group. Paco Koudstaal, regional director Latin America of the HOYER Group, added, "We are excited to integrate INTER-TANK's

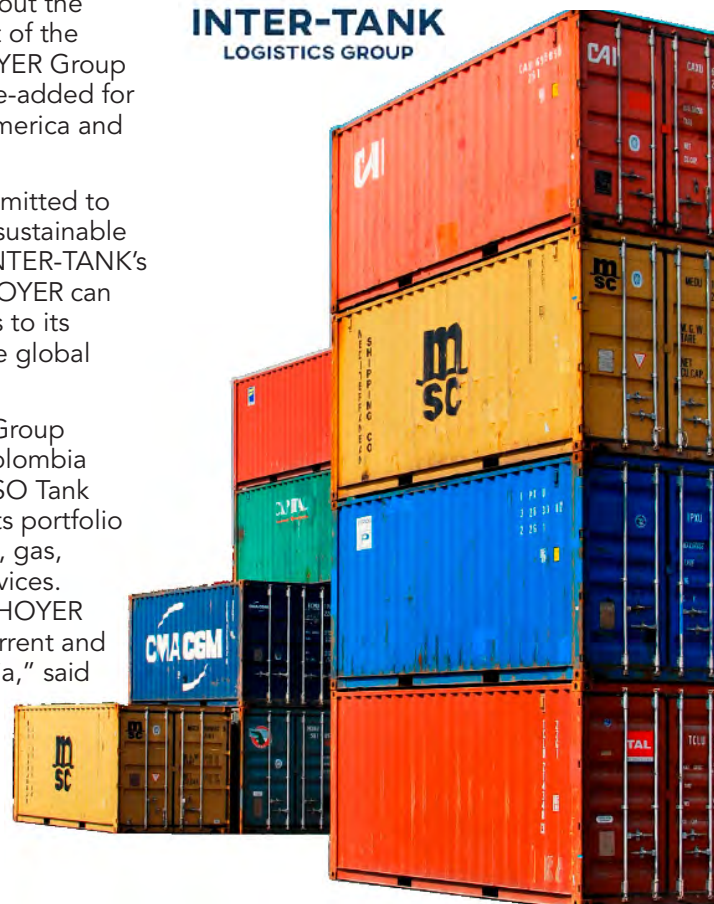
expertise and welcome over 30 new colleagues with extensive experience in Chile's wine and oil markets."

Philip Fell, commercial manager of INTER-TANK, states about the partnership, "Being a part of the global network of the HOYER Group will create additional value-added for our customers in South America and worldwide."

The HOYER Group is committed to providing innovative and sustainable logistics solutions. With INTER-TANK's thermoliner technology, HOYER can now offer new innovations to its customers firsthand on the global level.

Additionally, the HOYER Group opened a new office in Colombia in February, focusing on ISO Tank business and expanding its portfolio locally to include flexitank, gas, IBC tote, and trucking services.

"I am thrilled to offer the HOYER Group's services to our current and new customers in Colombia," said Isabel Londoño, country manager Colombia of the HOYER Group. ■





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Alisan Den Hartogh marks 20 years of partnership and Innovation in Türkiye



Alisan Den Hartogh proudly marks 20 years of successful collaboration, innovation, and excellence in Türkiye. Since the establishment of the joint venture with Alışan Group, the company has been committed to delivering creative logistics solutions and building strong, long-term partnerships within the industry. Over the past two decades, Alisan Den Hartogh has played a crucial role in enhancing chemical logistics in the region, providing safe, efficient, and sustainable transportation and storage solutions.

Since its inception, Alisan Den Hartogh has continuously evolved to meet the growing demands of the chemical logistics industry. The company's dedication to operational excellence and customer service has allowed it to strengthen its market position and develop a reputation for reliability, safety, and efficiency.

By leveraging the combined expertise of Alışan Group and Den Hartogh, the company has introduced innovative logistics strategies, streamlined supply chain management, and reinforced best

practices in chemical transport and storage. Over the years, Alisan Den Hartogh has expanded its fleet, infrastructure, and service offerings, ensuring seamless logistics solutions for its diverse clientele.

With two decades of success, collaboration, and progress, AlisanDenHartogh looks forward to many more years of delivering value-driven logistics solutions and continuing to set industry benchmarks in Türkiye and beyond. ■

ITCO global Tank Container Fleet reaches 882,023 Units



The International Tank Container Organisation has released its 13th Annual Tank Container Fleet Survey, reporting that the global tank container fleet has reached 882,023 units. The survey provides key insights into the industry's growth and development, highlighting trends in fleet expansion and operational capacity.

ITCO's annual report serves as a valuable resource for stakeholders in the tank container sector, offering a comprehensive overview of market dynamics and fleet distribution worldwide. ■



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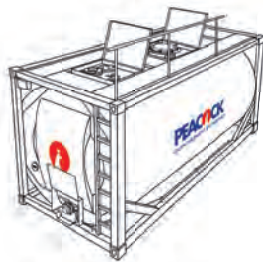
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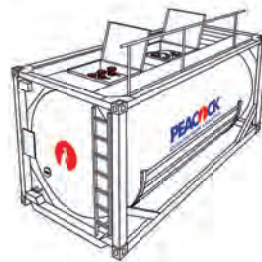
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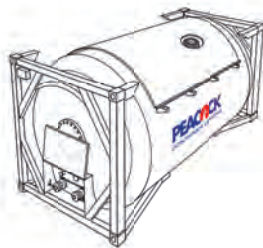
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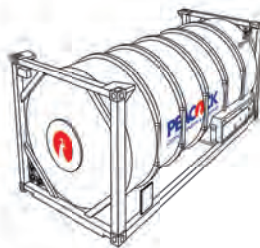
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Mijnders buys Jenusch

Dutch tank transport firm JL Mijnders Transport, based in Melissant, south Holland, is taking an important step in its European growth strategy by acquiring German company Jenusch Transporte.

As of 1 April 2025, the company now operates under the name Jenusch & Mijnders Transporte GmbH.

CEO Walter Mijnders said the acquisition was an important milestone: "Jenusch Transporte has built a strong reputation within the sector. By joining forces, we can offer our customers an even better service and more efficient transport solutions."

Despite the acquisition, Jenusch will continue to operate from its current location, Solingen, in Germany's Ruhrgebiet, and with the same team.

Majda Kranjc-Jensch, CEO of Jenusch Transporte, emphasised the benefits of the collaboration: "After careful consideration, we have concluded that Mijnders Transport is the ideal partner for the future of Jenusch. I am convinced that this collaboration offers many benefits for both our customers and employees."

Both companies specialise in tank container and tanker transport for chemical products, gas and foodstuffs.

Majda Kranjc-Jensch has been appointed operations manager.

Walter Mijnders affirmed that under the new name Jenusch & Mijnders Transporte, the company would explicitly focus on further European growth. ■

Stolt Tank Containers earns EcoVadis gold rating

For Stolt Tank Containers, sustainability is more than just a compliance requirement—it is a fundamental strategy for long-term success. The company has fully integrated sustainability into its operations, aiming to reduce its environmental footprint while making a positive societal impact.

Rather than treating sustainability as an isolated initiative, Stolt Tank Containers ensures it influences strategic decisions, innovations, and daily operations. By continuously challenging industry norms and seeking improvements, the company aims to set new benchmarks that demonstrate how profitability and sustainability can coexist.

This commitment to sustainability has been a driving force behind operational enhancements, leading to continued industry recognition. Stolt Tank Containers has once again been awarded the prestigious EcoVadis Gold rating, reflecting its ongoing dedication to sustainable business practices. ■





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As technology advances and sustainability becomes imperative in the tank container industry, CIMC Safeway Technologies Co., Ltd. (here referred to as CIMC SAFEWAY) has strategically invested in R&D, intelligent equipment, and green manufacturing, transforming herself from a traditional

manufacturer to an industry-leading green and intelligent manufacturer. These efforts were recognized with China's prestigious National Green Factory and National Intelligent Manufacturing Excellence Factory awards in Feb 2025—a testament to its innovation leadership.

As a pioneer in green production, CIMC SAFEWAY has implemented industry-leading initiatives, including its groundbreaking powder coating line, which eliminates VOC emissions and sets a new standard for eco-friendly manufacturing.

In intelligent manufacturing, the company leverages AI, 5G, IoT, and digital twin technologies to build a fully connected production ecosystem. Its advanced MES system and real-time data monitoring optimize efficiency, positioning CIMC SAFEWAY at the forefront of digital transformation.

Looking ahead, CIMC SAFEWAY aims for 100% automation in welding in the near future and plans to expand AI applications across production, quality control, supply chain management and customer service. As digitalization reshapes the tank container industry, AI-driven innovation will play an increasingly vital role in shaping our future. ■

Trifleet Leasing announces partnership with Isotank Central for representation in Middle East and Turkey

Trifleet Leasing, a global leader in tank container leasing, has announced a strategic partnership with Isotank Central to serve as its official representative across the Middle East and Turkey. The collaboration marks a significant step in Trifleet's ongoing efforts to expand its international footprint and enhance regional customer support in key growth markets.

Through the partnership, Isotank Central will act as the primary liaison for all commercial and operational matters related to Trifleet's services in the region. Customers in the Middle East and Turkey will gain more direct access to Trifleet's extensive fleet of high-quality tank containers, as well as its leasing expertise.



The partnership is expected to streamline service delivery and improve response times for regional clients, while also supporting Trifleet's long-term strategy of offering tailored, localised solutions in strategically important markets. ■



We are proud to partner with Isotank Central, whose local knowledge, industry experience, and client-focused approach align perfectly with our values. This reinforces our dedication to delivering sustainable excellence to customers in the Middle East and Turkey

Robin Pol,
Managing Director, Trifleet Leasing





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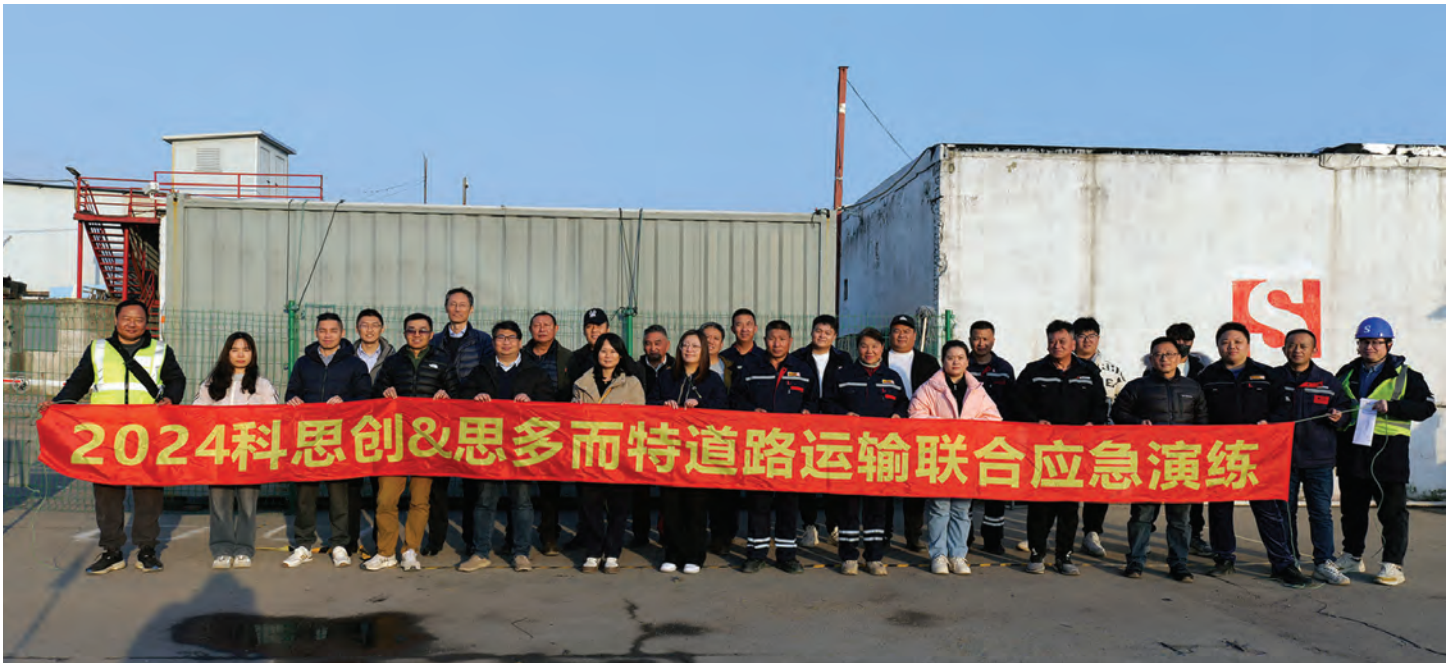
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Stolt Tank Containers, SSL and Covestro successfully conduct joint emergency drill to enhance safety response

Stolt Tank Containers recently participated in a joint emergency response drill organised by Shanghai SSL Logistics Co., Ltd. and global polymer manufacturer Covestro at the SSL Baoshan facility in Shanghai. The comprehensive exercise, designed to assess emergency preparedness and collaborative response capabilities, featured four distinct emergency scenarios: chemical leakage, fire outbreak, equipment failure, and personnel evacuation.

The drill was aimed at enhancing response speed and coordination between operational teams, with several core third-party suppliers also invited to participate. These suppliers, many of whom have been long-term partners of Stolt Tank Containers, played a critical role in the simulation, further demonstrating the importance of close cooperation across the supply chain.

The Covestro team, led by the Head of Integrated Logistics Safety for the Asia-Pacific region, included seven

specialists in logistics safety and operations. Their presence added considerable value to the exercise, as they observed the scenarios in action and provided insightful feedback based on extensive industry knowledge.

Commitment to Safety in the Tank Container Industry

Safety is a cornerstone of the tank container industry, particularly in the transport of hazardous chemicals and liquids. Operators must comply with rigorous international standards, including the International Maritime Dangerous Goods (IMDG) Code and the European Agreement concerning the International Carriage of Dangerous Goods by Road (ADR).

For Stolt Tank Containers, regular safety drills such as this one are essential. They provide an opportunity to test and refine response protocols, enhance team readiness, and identify areas for improvement. Investment in safety is continuous, covering well-maintained

equipment, comprehensive training programmes, and advanced monitoring systems—all of which contribute to reducing risk and protecting both people and the environment.

Strengthening Collaboration for Future Resilience

This latest exercise marked a significant milestone in the partnership between Covestro and Stolt Tank Containers, reinforcing a shared commitment to operational excellence and safety. Both companies have expressed a strong intention to build upon the lessons learned and further strengthen their emergency management frameworks in the coming year.

Looking ahead to 2025, Stolt Tank Containers and Covestro are committed to deepening their collaboration, continuously improving safety standards and fostering long-term, sustainable development across their operations. ■

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KAG acquires MC Tank



The Kenan Advantage Group has acquired MC Tank Transport, a diversified transportation company specialising in the delivery of liquid bulk chemicals in tankers and ISO containers.

The West Chester, Ohio-based company operates from eight terminal locations and three ISO container depots throughout the Southeast and Midwest, US, delivering and storing caustic soda, sulfuric acid, hydrochloric acid, and other specialty chemicals.

"This acquisition marks a key milestone in KAG's continued growth and solidifies our commitment to delivering innovative, specialised solutions to our chemical customers," stated Charlie DeLacey, chief executive officer of KAG.

"By combining the strengths of MC Tank with our existing fleet and network, we are enhancing our

capabilities to offer not only premier chemical transportation but also ISO container storage, transport, and related services to meet the evolving demands of our customers' supply chains."

As part of the transaction, KAG will welcome approximately 175 professional drivers and 70 operational and administrative members to their team while also growing their fleet by acquiring 100 tractors and 500 trailers/chassis. The ISO depots also provide container services, including storage, steaming, washing, and maintenance.

"KAG is the perfect partner to provide MC Tank with the resources and know-how to expand our footprint, capabilities, technology and services," stated MC Tank's president Michael Anderson.

"We are far from done implementing our vision and accomplishing the goals we have set for our organisation. We are tremendously excited for the opportunity to join the KAG team." ■

KAG
KENAN ADVANTAGE GROUP, INC.



“

By combining the strengths of MC Tank with our existing fleet and network, we are enhancing our capabilities to offer not only premier chemical transportation but also ISO container storage, transport, and related services to meet the evolving demands of our customers' supply chains.

Charlie DeLacey, chief executive officer of KAG.

”

Telematics



Dethmer Drenth,
Managing Director and Founder,
Intermodal Telematics BV

key to operational transformation

Tankcontainer Magazine shares the insights of Dethmer Drenth, Managing Director and founder of Intermodal Telematics, a leading force in smart fleet solutions for the tank container and rail logistics industries. No longer merely locating containers, it is transforming operations with data-driven actionable intelligence.

TCM: What services does IMT offer?

DD: Intermodal Telematics (IMT) is an independent telematics solution provider for the tank container and railcar industries. We deliver tailor-made and off-the-shelf hardware and software solutions to improve visibility, safety and operational efficiency across the supply chain. Our customers include tank operators, leasing companies, manufacturers, and end-users who depend on real-time data to manage their assets and logistics.

All of our development of the gateways, sensors and renowned platform is done 100% in-house, from initial design through to the final solution. The IMT team consists of hardware and firmware engineers, backend and frontend software engineers and we have our own ATEX-certified production facility for IMT gateways and sensors in The Netherlands. This ensures full quality control, fast development cycles and deep integration between hardware and software.

TCM: What's the background of IMT and your own background?

DD: IMT was founded in 2013 in Breda, strategically located between the ports of Antwerp and Rotterdam. Our roots lie in deep technical know-how and practical testing with early adopters in the intermodal sector. What began with small-scale installations quickly grew when Hoyer became the first company to equip their entire fleet with IMT telematics, creating the world's first fully smart tank container fleet. As for myself, I've been active in the telematics industry for more than 25 years. I co-founded multiple GPS and telematics ventures and played a key role in integrating telematics with navigation brands such as TomTom. I also laid the foundation for GARMIN's first Fleet Management Interface (FMI) and led its first implementation. My experience spans high-volume hardware development, battery-operated GPS solutions and scalable software platforms. Founding IMT allowed me to apply this expertise to the niche market of intermodal transport.

TCM: How does IMT use Artificial Intelligence (AI) in its solutions?

DD: AI is at the core part of how we create true value from sensor data. Two key AI-driven solutions are:

- AI Heating Detection: Our platform identifies when, where and for how long a tank has been heated. This not only supports operational transparency but enables "reverse billing" where operators can verify heating station invoices. One customer cut annual heating costs by around 50% using this feature.

- AI Cleaning Detection: We detect tank cleaning events based on location and temperature patterns. This helps ensure compliance, prevents contamination and avoids costly pitting damage due to delayed cleaning. Proactive cleaning alerts have already helped customers avoid high repair costs.

In addition, we have recently introduced a powerful AI-driven Digital Assistant on our platform. This assistant guides users through the platform by answering questions and helping them make the most of the available features and data. It greatly enhances the user experience and enables clients to maximize the value of our technology.

TCM: What sensor innovations has IMT introduced recently?

DD: We continuously expand our sensor offering with practical, safety-focused solutions:

- A tilt sensor detects manlids left open, raised handrails or valve misclosures, significantly boosting operational safety.
- Our chassis load sensor, developed with input from a major chemical client, detects loading/unloading events on trailers and (un)authorised trailer movements.
- We are currently in the R&D stage of a radar-based liquid level sensor with a potential accuracy of $\pm 2\text{mm}$ and invite interested clients to join our early field-testing program.

TCM: Tell us about the new 'Bridge' gateway.

DD: The 'Bridge' is our next-generation gateway: one-third the size and weight of our flagship CLT20-Ex, with greater power efficiency and extensive sensor compatibility. It reduces cost and expands application scope - ideal for trailers, IBC tanks and other use cases demanding compact and robust telematics at a fair price level.

TCM: IMT is also changing the game with a new subscription model - what's that about? →

DD: Our flexible subscription model is a breakthrough in the industry. Customers can activate or pause the subscription whenever they want. This flexibility allows for:

New-build readiness: Customers can equip new tank containers with sensors and gateways right from the factory, activating the service only when needed - either by themselves or their customers.

Deep sea shipping: During ocean transport, when no data is required, the subscription can be paused. Once the tank is back on land, the system transmits all buffered data after reactivation.

This model gives full cost control and makes it feasible to install telematics hardware across entire fleets without incurring unnecessary recurring costs from day one. It's a true industry first.

TCM: How many tank containers and railcars use IMT systems today?

DD: IMT has over 165,000 gateways and sensors installed on tank containers and railcars worldwide. We are by far the largest supplier for tank container telematics, and our sensor suite is the most comprehensive in the industry.

TCM: Is IMT's platform open to third-party systems?

DD: Yes, our platform is fully open to third-party input and output. Customers can access their data through our platform or build their own dashboards using our APIs. Interfacing with ERP systems, depot tools and logistics software is fully supported, ensuring seamless integration into any existing workflow.

TCM: What about cybersecurity and compliance?

DD: IMT was the first in the sector to obtain both ISO 27001 and ISO 27017 data security certifications. These standards ensure the highest levels of data protection, risk management and business continuity. We have a dedicated in-house team responsible for continuous



monitoring and updating of our cybersecurity infrastructure.

TCM: Is it expensive to make a tank container 'smart' today?

DD: Not anymore. A standard setup, including a gateway and a wireless temperature sensor, costs only a few hundred euros. The monthly cost for communication, platform usage, API access, cybersecurity and full customer support is just a few euros. This makes it economically viable for operators to equip every tank container, especially with the new subscription model where you activate the unit when you need it and pause when you don't.

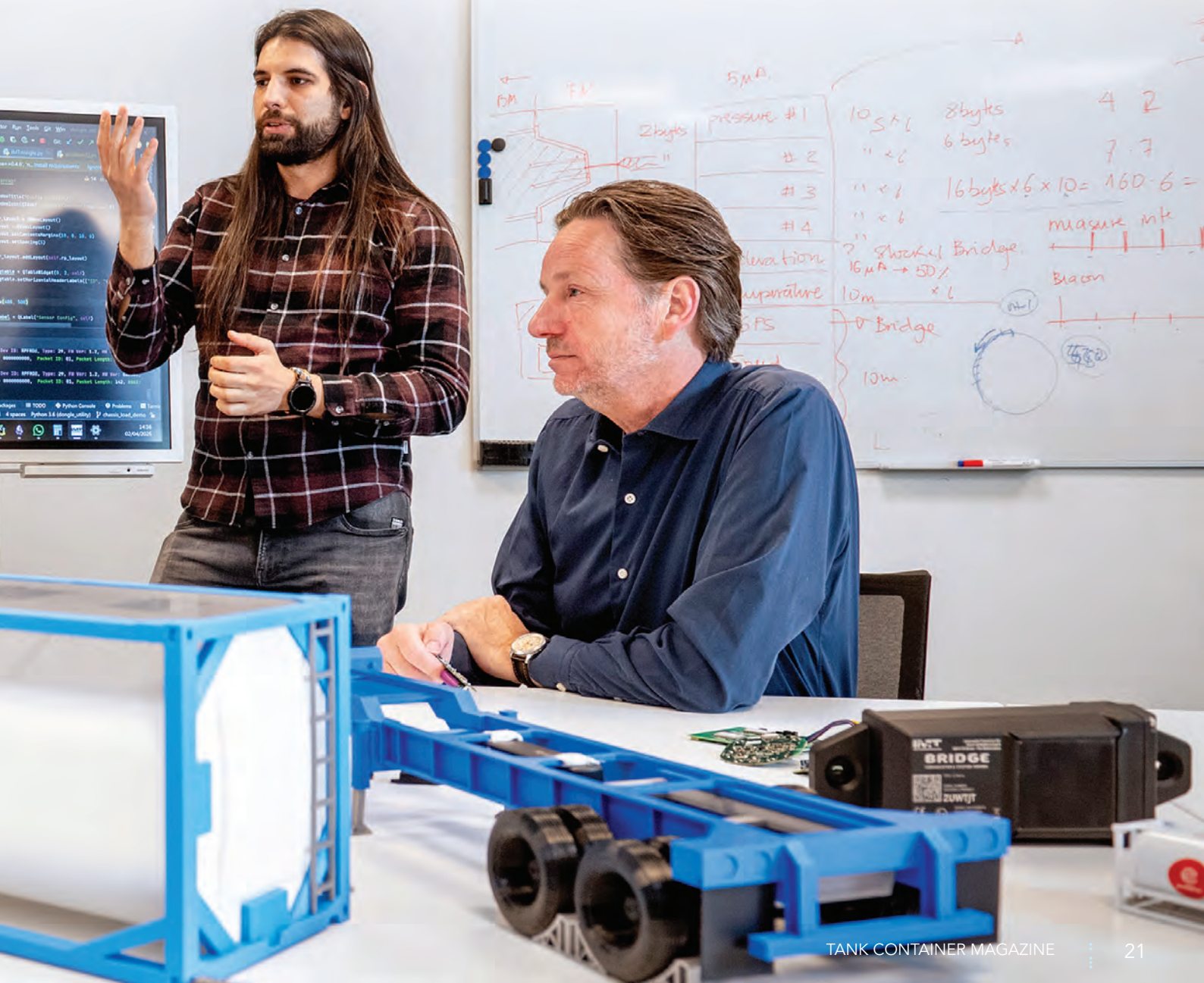
TCM: How will telematics develop in the future?

DD: At IMT, we see our gateways and sensors not merely as tracking tools but as data enablers. The true value lies in what you do with the data: improving logistics efficiency, enhancing safety, ensuring quality in transport, and reducing operational costs.

We actively collaborate with our customers to ensure optimal use of the entire system by integrating it with other available data pools. This is done based on real-world case studies and practical applications we've observed in the market. Telematics is no longer about locating containers - it's about transforming operations with actionable intelligence.

Biography: Dethmer Drenth has been active in the tech and telematics world since his teenage years, starting as a Commodore software developer and Sinclair columnist. He built and sold a multimedia software training business before co-founding several GPS and telematics ventures. A hands-on innovator, he played a key role in integrating telematics with major navigation brands like TomTom and GARMIN, laying the groundwork for the first Garmin Fleet Management Interface (FMI).

In 2013, combining his passion for innovation with deep technical expertise, he founded Intermodal Telematics (IMT), which today is a leading force in smart fleet solutions for the tank container and rail logistics industries. ■





A decade ago - *happy days?*

As the global tank container industry meets for the biennial exhibition at *transport logistic* in Munich this month, *Tankcontainer Magazine* thought a quick reflection on how the industry has grown over the past 10 years might conclude if times were better back then. They weren't.

Tank container fleet has doubled

First, the bald statistics: the global tank container fleet has doubled over the past decade and, this January, stood at 882,023 units, according to ITCO's annual fleet survey. This implies an annual compound growth of 7.2% based on the Rule of 72. The Rule of 72 - the first thing taught by most MBA finance courses - dates back over 500 years and can be used to mentally calculate annual compound growth rates in less than one second. To calculate the compound growth rate, simply divide 72 (it is always 72) by the period of time over which anything doubles in size. In the case of the global tank container fleet, 72 divided by 10 (years) gives a compound growth rate of 7.2% p.a. since 2015.

[The Rule of 72 can also be used to instantly calculate how long it would take for, say, an investment to double if the annual

investment rate is known e.g how long would it take to double your money if it were invested at 6%? $72/6 = 12$ years. And how long would it take to double if the interest rate was 4%? $72/4 = 18$ years.]

Prices near historic lows

A decade ago, standard T11 tank container prices were in the process of falling from \$23,000 in 2014 to historic lows of under \$13,000 in 2016, partly reflecting a fall in nickel prices. Rationally, low original equipment costs may appear desirable for all in the industry (except for manufacturers) but they usually occur when the tank container market, which depends on the cyclical demand from the specialty chemicals sector, is going through one of its tougher phases. The industry as a whole has greater profitability when tank container prices are higher and, as a sector, is characterised by relatively low volatility.



Unfortunately, today's market is one of those tougher times and the overlay of persistent below-3% global economic growth, structural overcapacity in the chemicals sector and tariff uncertainty will lengthen the time period that this particular 'tough time' will persist. The positive result for the industry is that weaker players may not survive, thereby strengthening those that remain.

More competitive market

Over the past 10 years, the number of tank container operators has increased by approximately a quarter while the number of lessors has increased by 15%. The lessor fleet has increased by around a third. No real conclusions can be drawn from these numbers alone but what is undeniable is that the market has become more competitive. Customer expectations have risen, the tank container infrastructure has been built out to facilitate intermodal movements and technical innovations have changed the capabilities of tank containers. The use of data, information systems and IT networks in 2015 was antediluvian compared to what is being routinely deployed now.

Weak market conditions in 2015

A quick read of *Tankcontainer Magazine's* 'Review of the Year 2015' summarises the market conditions at the time. It was described as a 'low-joy' year for the industry - demand growth was less than forecast and even fell in certain regions, competition had intensified, supply chains were changing increasingly quickly and structural overcapacity and low utilisation was being made worse by the large-scale purchasing of tank containers at rock-bottom prices.

Profit margins for many were staying stubbornly low, pressurised

by the rate reductions being sought by customers who were urgently looking to minimise their supply chain costs. These demands were readily conceded by tank container owners looking to increase their fleet utilisation.

..... but some positives

More positively, there was a more widespread understanding and adoption of tank containers by customers and the industry was becoming ever more effective at promoting the benefits of the intermodal transport of chemicals, food grade liquids, gases and some powders by tank containers.

Other positives at the time included consolidation among both tank container lessors and operators, which was eliminating some of the competition. In January 2015, Bohai Leasing - controlled by Chinese conglomerate HNA - was closing its purchase of San Francisco-headquartered Cronos for \$550 million, having purchased Seaco in 2011 for \$1.1 billion. Cronos had been owned by two US hedge funds (Kelso & Co and Transportation Capital Group, TCG). TCG has, of course, a continuing investment in tank container via its shareholding in Singapore-based CS Leasing, which is 45% owned by TAP Ltd, an investment fund managed by TCG.

In 2015, finance was low cost and freely available, global chemical trade increased markedly and tank container prices were close to historic lows due to the chronic overcapacity at some tank container manufacturers.

The gas tank container market was delivering particularly robust growth and the intra-Asia and North Atlantic tank container trade routes were very active, buoyed by a strong US dollar. →

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Operator performance/M&A

Stolt Tank Containers (STC), the market leading operator at the time, was delivering a healthy profit of \$63.3 million from a fleet of 35,369 tank containers and generating \$510 million of operating revenue. Ten years on and 2024's operating profit was \$59 million from a fleet of 51,407 tank containers that generated \$652 million of operating revenue from one-third more shipments (2022's peak was \$173 million of operating profit from \$895 million of operating revenue). At the time, STC reported that no other operator had its own network of depots and, to this day, continues to add value via its network of 21 full service depots and hubs, some of which are joint ventures.



Elsewhere in the operator sector in 2015, there were a string of acquisitions whose purpose was to extend 3PL credentials, move into attractive logistics segments, develop geographic

footprint or increase fleet density. Most noteworthy was the announcement at the end of 2015 of Den Hartogh's acquisition of InterBulk, 35% owned by Sinotrans, for £42 million plus the assumption of InterBulk's £53 million pile.

InterBulk's debt was largely unaffected by the £9.4 million sale-and-leaseback of some of its fleet to TAL in July 2015. Instead, the proceeds went to the early repayment of an element of InterBulk's bank term loans. InterBulk's demise was unsurprising to many as recent results had been poor with a mere £2.3 million of profit before tax on revenue of £225.3 million, a 12% reduction on the previous year, according to its 2015 accounts.

The value of the acquisition lay in InterBulk's deep sea tank container fleet, which was two to three times that of Den Hartogh's. Deep sea chemical growth was continuing its long

term growth in 2015 - according to ExxonMobil Chemical, the volume of chemicals traded between regions was forecast to grow to nearly a fifth of global chemical production capacity by 2020 (up from 5% in 2024).

Trade flows

One highlight of the 2015 market was the buoyancy of transatlantic tank container activity, supported by a 10% depreciation of the Euro against the US dollar, and the strength on the intra-Asian market.

Opportunities in the Middle East were dominated by the prospects of the enormous \$25 billion Sadara project in Jubail, a joint venture between Dow Chemical and Saudi Aramco. 14 of its 26 plants were to produce specialty chemicals which would depend on tank containers and swaps for their local and global distribution. At times, the frustrating delays on this project made it feel as tangible as a mirage in the desert but, for those with the patience and resources, the rewards are finally being generated (although at lower levels than the initial, overly-ambitious, expectations).

The infrastructure on which tank containers depend was expanding in 2015 with 510 cleaning depots in Europe. Basic cleans were typically up to €185 per tank container and the cost of cleaning difficult products like MDI isocyanate was around €1,000.

Tank container manufacturers increased capacity in 2015 and were busy trying to keep line utilisation high. Those with high utilisation moved away from the manufacture of tank container 'specials' for a time as the additional manufacturing requirements of specials slow down line speeds. A number of new modifications and designs came onto the market including a composite tank container weighing only 2,230 kg.

Conclusion

It has been only ten years since 2015 and the tank container industry has seen many developments, and a healthy number of mergers and acquisitions, in the intervening decade.

The transformation of digital and information systems has been, and will be, the most leveraging of all these developments. However, although the industry's dimensions have expanded, its fundamental market dynamics, drivers and company participants remain broadly the same, with the most significant changes in Asia. An opportunity for some; a threat for others. ■





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TGL leverages Turkey's role as logistics hub

Istanbul-headquartered TET Global Logistics (TGL) continues to expand its reach and offering thanks to its commitment to quality.

With its strategic location and strong chemical sector, Turkey, says TGL deputy general manager Cemil Can Yalçın, has become an increasingly important nexus of the global tank container market. "Many international chemical companies have production facilities in Turkey and global trading companies utilise storage facilities in Turkey, positioning the country as a logistics hub. This makes Turkey play a critical role in both production and distribution processes," he explains.

Moreover, broader geopolitical developments have also further heightened Turkey's importance within global supply chains. "There have been significant changes in global transport routes over the past year. Previously, shipments from Europe directly to Russian ports were shifted to routes between China, India and Russia due to the Russia-Ukraine war. This process reshaped transport networks and led to the development of new alternative routes," he notes.

"However, the emergence of new alternative routes has **lengthened transit times**, making Turkey a key logistics hub," he says. "As Turkey has become a strategic transit point in the central corridor, transport services in the region have become even more important. The increase in transit routes for transit cargoes through Turkey has enabled us to expand our logistics operations in this geography."

Success factors

With all these factors at play, it is perhaps no surprise that the number of tank container operators present in the country in one form or another has increased significantly over recent years, with Yalçın reporting that many Asian firms in particular have sought to open offices in Turkey. "The fact that Turkey is a region with high freight mobility due to its natural trade structure is one of the most important factors that makes the country attractive in terms of logistics. However, the ability to offer high quality services at competitive prices is one of the key factors determining success in this market," he states.

And when it comes to choosing a well-established and experienced local partner, TGL certainly has much to make it appealing to international shippers. Specialising in the transport of hazardous and non-hazardous liquids and liquefied gases, the company serves a broad range of customers from the chemicals, paints, personal care, cleaning, pharmaceuticals and food sectors, among others. "With our own fleet of 400 vehicles, we reach a transport capacity of 1 million tonnes per year and organise more than 40,000 trips in Turkey and abroad. While we carry out our **MDI/TDI** transports safely with our ISOPA-certified drivers, we keep our fleet age young with our EURO 6 tractors that comply with ADR regulations and environmental standards," Yalçın says. ➔

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Offering a full gamut of services, from highly secure door-to-door services to temperature-controlled transports, the company makes “best use of the power of digitalisation” to enhance both efficiency and quality. “Our vehicle tracking systems allow us to perform real-time monitoring in all transport processes and enable us to instantly monitor the loading and transport processes of temperature-controlled products,” he says.

Longstanding partnership

At the same time, TGL’s portfolio of tank container services is further bolstered by its longstanding partnership with **Bulkhaul**, the seventh largest tank container operator by fleet size globally. “We mutually add value to each other in our operations in Turkey and expand our logistics network by optimising our business processes,” Yalçın says. “On behalf of Bulkhaul, we undertake important operations, such as ensuring that products reach customers in import transactions, carrying out the control and safety processes of tanks and managing storage and cleaning services from a single source. We also find re-export cargoes and ensure that the tank containers are shipped full from Turkey to different regions.”

“This system offers a sustainable co-operation opportunity on win-win terms for both companies,” he continues. “Bulkhaul’s strength in deep-sea transport and its global logistics network allows TGL to expand the scope of services we offer to our customers. It contributes to the development of more flexible, fast and reliable transport solutions in our international logistics activities, enabling us to respond to the global logistics needs of our customers.”

And when it comes to international logistics activities, TGL has now expanded its operations in Greece, Poland and Romania, opening new offices while accelerating its “fleet expansion efforts and investments in environmentally friendly transport models” to better serve the needs of the European market. “With our new organisation in Romania, we are taking important steps towards our goal of increasing our intra-European transports,” Yalçın reports, revealing that TGL is also evaluating the establishment of new storage and cleaning facilities there. “These investments,” he says, “will enable us to offer faster and more effective solutions to our customers.”

Secure storage

No stranger to the realm of tank container storage, the company currently operates two such sites in Turkey for the handling of full and empty units alike. Operating 24/7 site security, these facilities employ concrete storage areas; boast a total storage capacity of 350 units; and offer a range of value-added services, such as product transfer, decanting and labelling. “We believe that security in the logistics industry must be met at the highest level,” he says. “For this reason, we offer operations such as tank container repair, maintenance, overhaul and painting services in our facilities. Periodic inspection processes ensure that malfunctions that may occur in mechanical systems are detected in advance, preventing costly damage. With 2½ - and 5-year maintenance periods, we ensure that containers provide long-lasting and safe service.”

Additionally, TGL also offers cleaning services through its sister firm **Dilmak Tanker**, which, Yalçın notes, has the enviable reputation of being the first SQAS-certified cleaning facility in Turkey. “With the awareness that hygiene is a critical element

in chemical transport, we ensure the transport of lubricants, paint chemicals, fatty acids, cleaning raw materials, construction chemicals and many other chemicals in a hygienic environment. Thanks to our cooperation with Dilmak Tanker, we meticulously carry out the cleaning and control processes of all the vehicles we serve before loading,” he says.

Operating six environmentally-friendly cleaning bays, the Dilmak facility can not only handle difficult-to-clean products but also offers on-site heating services as well as tank maintenance and repair. “Thanks to regular audits [of the site], we comply with internationally recognised hygiene and safety standards by offering important certificates, such as the EFTCO Cleaning Document (ECD) and the Turkish Cleaning Certificate (KTTD) to our customers,” he says, describing TGL’s arrangement with Dilmak Tanker as a key boon in helping it “carry out our logistics processes in the safest and most hygienic way”.

Safety first

“As TGL, we put health, safety, environment and quality (HSEQ) issues at the centre of our logistics operations and attach great importance to conducting our activities in accordance with international norms,” he says, citing membership of the SQAS initiative as helping the company “meet the high safety standards required” for the transport of dangerous goods and sensitive products. In line with this proven commitment to safety and environmental protection, TGL also places great emphasis on the benefits of staff training.

“By attaching great importance to driver training, we aim to increase expertise and safety awareness in the sector. With regular training programmes, we provide our drivers with up-to-date information and make transport processes the safest by creating high awareness,” Yalçın reports. “Launched at the end of 2024, our Professional Driver Programme not only brings non-drivers into the sector but also provides them with financial support and a job guarantee. In this way, we aim to train qualified and highly aware drivers. We conduct these trainings with the leading professionals of the sector and implement the best practices.”

As further testament to TGL’s commitment to HSEQ matters, the company was awarded a Green Logistics Certificate from the Turkish Ministry of Transport and Infrastructure in 2023 in recognition of its compliance with international standards and the implementation of environmentally-friendly transport services. “We conduct our operations by minimising environmental impacts. While these efforts contribute to our customers’ green transformation goals, they also support our full compliance with international norms,” Yalçın asserts, stating that the company continues “to develop environmentally-friendly logistics solutions with determination” and the aim of further strengthening its leading role within the sector.

“As TGL, we continue to provide our customers with the most reliable services through our strengths that set us apart in the logistics sector. Our core philosophy is to focus solely on what we specialise in and deliver it with the highest quality standards,” he states. “We position our relationships with customers not as mere supplier-client transactions, but as long-term strategic partnerships. We build our collaborations on trust, quality and sustainable solutions, aiming not only to support their logistics processes, but also to add value to their operations.” ■



Is the tank container market

Tankcontainer Magazine explores the evidence that is considered by the European Commission and the US competition authorities when calculating market concentration. We compare the competitiveness of lessors and operators in the tank container industry with the ocean container shipping sector.

Summary

In Europe, having a dominant position in a market is not a criminal offence. Abusing it, is. The European Commission’s anti-competitive legislation, laid out in **Articles 101** and **102** of the Treaty on the Functioning of the European Union, prohibits anti-competitive agreements and the abuse of dominant positions, thereby ensuring fair competition within the bloc. Article 102 prohibits firms that hold a dominant position on a given market to abuse that position, for example by charging unfair prices, by limiting production or by refusing to innovate to the prejudice of consumers. Infringing firms could end up being fined as much as 10% of their annual worldwide turnover.

Meanwhile, in the US, Section 7 of the **Clayton Act** prohibits mergers and acquisitions where “in any line of commerce or in any activity affecting commerce in any section of the country, the effect of such acquisition may be substantially to lessen competition, or to tend to create a monopoly.”

Section 7 was designed to arrest “anticompetitive tendencies” by defining competition as a process of rivalry that “incentivizes businesses to offer lower prices, improve wages and working conditions, enhance quality and resiliency, innovate, and expand choice, among many other benefits.

Mergers that substantially lessen competition or tend to create a monopoly increase, extend, or entrench market power and deprive the public of these benefits. Mergers can lessen competition when they diminish competitive constraints, reduce the number or attractiveness of alternatives available to trading partners, or reduce the intensity with which market participants compete.”

The Clayton Act requires the Agencies to assess whether mergers present risk to competition. To show that a merger is unlawful, a plaintiff need only prove that its effect “may be substantially to lessen competition” or to tend to create a monopoly.

The Agencies examine the evidence available to assess the risk a merger presents. To assess the risk of harm to competition they begin the analysis of a proposed merger by asking: how do firms in this industry compete, and does the merger threaten to substantially lessen competition or to tend to create a monopoly?

In this article, we consider how dominant the largest players are among tank container lessors, operators and manufacturers. For comparison, we also reference dominance within the ocean shipping market, where a succession of mergers and acquisitions have changed the sector’s competitive intensity and market dynamics over the years.



overly-concentrated?

Lessors

The tank container leasing market is far more concentrated than the operator market, and for good reasons. Large fleet sizes create strong competitive advantage for lessors since their commercial success is primarily driven by leveraging the economies of scale available to them in two critical areas: the purchasing power they can exert on tank container manufacturers by having a large fleet, and the low weighted average cost of capital the big lessors can deploy. Put simply, the cost of money and the cost of tank containers are the two fundamental drivers of what they must recover, as a minimum, in their *per diem* lease rates.

Unsurprisingly, private equity and global asset managers, rather than family companies, dominate the ownership of the top lessors. **Eurotainer/Raffles Lease** are part of the Ermewa Group, a European leader in railcar leasing and the global leader in tank container leasing. Ermewa is now owned by the DWS-CDPQ consortium. DWS, previously part of Deutsche Bank, is one of the world's largest asset managers while Caisse de dépôt et placement du Québec (CDPQ) is a global investment group managing funds for public retirement and insurance plans.

EXSIF Worldwide, with its 71,300 tank containers, is a wholly-owned subsidiary of American industrial holding company Marmon Holdings, Inc., and sits within its Marmon Rail business, part of Warren Buffet's Berkshire Hathaway Inc.

Seaco Global - the world's third largest tank container lessor with a fleet of 43,000 tank containers - is a wholly-owned subsidiary of Global Sea Containers Ltd (GSCL), a Bermuda company. Bohai Leasing, which indirectly owns all of the shares of GSCL, is a Chinese public company listed on the Shenzhen Stock Exchange and is part of failed Chinese conglomerate, HNA Group.

CS Leasing, the fourth largest tank container lessor, is 45% owned by **Maas Capital**, an affiliate of global infrastructure investor EnTrust Global, and 45% owned by TAP Ltd (an investment fund managed by Transportation Capital Group). The remaining shares are held by management. Maas Capital was founded as part of the Fortis Group before merging with ABN AMRO and focuses on smaller investments of over \$25 million in the shipping, intermodal and offshore sectors. The shipping portfolio targets a long term, stable return of 15-20%.

CS Leasing's fleet has grown rapidly since its formation in 2015 and includes standard T11 tank containers, lined tanks, swap bodies and specialist dry freight units. It has the youngest fleet of tank containers in the market, with an average age of 5 years.

ITCO's annual global fleet survey showed that, as of 1 January 2025, these top four lessors accounted for 50% of the leased tank containers (191,550 units out of an estimated total leasing fleet of 381,781). More generally, the top ten lessors - in a leasing market made up of at least 38 lessors - accounted for about 84% of the total leasing fleet.

With the market dominated by the top four lessors, how competitive is the tank container leasing market?

How is market competitiveness calculated?

The Herfindahl-Hirschman Index (HHI) is a simple and commonly accepted measure of market concentration - a proxy for market competitiveness - and is calculated by squaring the percentage market share of each company in a specific market and then summing the resulting numbers.

The formula can be expressed as $HHI = S_1^2 + S_2^2 + S_3^2 + \dots + S_n^2$ where S_n is the percentage market share of each company. ➔

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In any line of commerce or in any activity affecting commerce in any section of the country, the effect of such acquisition may be substantially to lessen competition, or to tend to create a monopoly

A 100% monopoly would have the largest possible value ($100^2 = 10,000$) and the HHI for a very highly fragmented industry would be close to zero.

The HHI index is used by the Department of Justice Antitrust Division and the Federal Trade Commission in the US, both of which are the US competition authorities. The Justice Department generally considers an industry with an HHI of less than 1,800 to be a competitive marketplace and mergers and acquisitions are usually not problematic. An HHI of 1,800-2,500 is considered a moderately concentrated marketplace and an HHI of over 2,500 to be a highly concentrated marketplace and most likely to be subject to scrutiny by competition authorities. US merger and acquisition transactions that increase the index by more than 100 points in highly concentrated markets raise antitrust concerns as the assumption is that they bolster market power under the *Horizontal Merger Guidelines* issued by the Department of Justice and the Federal Trade Commission.

HHI for the tank container leasing market

If the sum of the squares of the percentage market share of just the top ten leasing companies are calculated, the HHI is 1,166 (the top ten lessors account for 85% of the global leased fleet). The tank container leasing market can therefore be considered a competitive marketplace and, on an HHI basis, is more competitive than in 2016, when the HHI index was 1,263.

HHI for the tank container operators market

The tank container operator market is far less concentrated than the leasing market. The top ten operators (out of over 240) account for just under half of the global operator fleet of 619,741 tank containers and have a combined HHI of less than 300 i.e. a highly contestable market.

Tank container manufacturing is, of course, heavily concentrated in China, where there are unique considerations when it comes to competitive markets. Hypothetically, the HHI index would be 3,100, based on the numbers of tank containers manufactured in the year to December 2022 (the last year manufacturers agreed to provide their numbers for the annual ITCO global fleet survey). This places it well into the territory of being a concentrated

market where, as we know, CIMC dominates for a number of compelling reasons.

Shipping industry HHI

A 2024 analysis of the HHI index for the ocean carrier shipping industry by *Sea-Intelligence Sunday Spotlight* was partly initiated as a response to complaints by shippers of the perceived market domination of the large ocean carriers, which also carry tank containers. The global HHI score for the top 30 carriers had declined very marginally but was under 1,200, implying a low degree of market concentration and a competitive marketplace.

For the 10 largest carriers, the data clearly showed that the global level of concentration did not exceed what is normally seen as the HHI threshold level of 1,800 for marginal concentration.

An Alphaliner report in September 2022, reported by the World Shipping Council, showed that concentration remained limited in the liner shipping industry at the time, both overall and on a trade-by-trade basis. The analysis followed a 4-5 year period of rapid change in the rankings, itself an indication of the dynamism and competitiveness of the container shipping market. No carriers had a capacity share of more than 20%, only three carriers had capacity shares higher than 10% and only seven had capacity shares above 5% globally.

MSC was the largest carrier with 19% capacity share worldwide and the top 5 carriers (MSC, Maersk, CMA CGM, COSCO and Ocean Network Express/ONE) accounted for approximately 60% of world fleet capacity.

The findings are confirmed by an HHI score of less than 1,000 for the liner shipping industry globally.

The HHI for container shipping on specific trade lanes can also be calculated. For the US, for example, the two trade lanes of most relevance are the Asia - US West Coast and Northern Europe - US lanes. According to the World Shipping Council, both have HHI levels that are indicative of competitive markets with no single supplier having a market share of more than 25%. The HHI for the container shipping industry serving Asia - US West Coast →



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“

The historically high freight rates experienced recently by US exporters and importers have been devastating to many, but I want to emphasize that the Commission has done its job during the Covid-19 pandemic to enforce our competition authority. Our markets are competitive and the high ocean freight rates have been determined by unprecedented consumer demand, primarily in the United States, that overwhelmed the supply of vessel capacity. Congestion further constrained available capacity.

US Federal Maritime Commissioner, (at the time)

”

was 1,018 and for Northern Europe - US it was 1,508, which just enters the 'moderately concentrated' band.

The US Federal Maritime Commissioner at the time concluded that: "The historically high freight rates experienced recently by US exporters and importers have been devastating to many, but I want to emphasize that the Commission has done its job during the Covid-19 pandemic to enforce our competition authority. Our markets are competitive and the high ocean freight rates have been determined by unprecedented consumer demand, primarily in the United States, that overwhelmed the supply of vessel capacity. Congestion further constrained available capacity."

A hypothetical

Turning back to tank containers, it was widely reported in mid-2024 that **Textainer**, owned by Stonepeak, a US private equity fund, was said to be in 'advanced talks' to acquire third largest tank container lessor, **Seaco** Global. New York-based Stonepeak specialises in investing in infrastructure, and other tangible assets, and had completed its \$7.4 billion acquisition of Textainer, the major lessor of intermodal containers, in March 2024.

The sale of Seaco has been an on-again-off-again prospect for several years now, but, at the time, there was said to be more than one bidder. So far, there has no further news but we can explore the potential competition elements of any corporate action involving these huge container leasing companies.

When Stonepeak bought Textainer in 2024, Textainer's fleet stood at just over 4 million TEU (Twenty-foot Equivalent Units) of

containers. It now stands at 4.4 million TEU, putting it in second place in the container leasing company ranking by size, behind **Triton's** 7 million TEU fleet. **Seaco** Global is the fifth largest container leasing company with a fleet of around 2.4 million TEU. **Florens** is the third largest player with a fleet of around 3.9 million TEU and the merged **Beacon/CAI** is fourth with around 3.3 million TEU.

Acquiring Seaco would have boosted the Textainer fleet to 6.7 million TEU, just behind Triton's 7 million TEU container fleet. The acquisition would have left the container leasing industry with five main players with fleets of over 1 million TEU controlling over 90% of the market. Triton and Textainer alone would have controlled over 50% of the global leasing fleet of containers.

If Textainer acquired Seaco, and based on fleet size figures, the box leasing industry would have moved above the benchmark 1,800 HHI score and into the zone for a "highly concentrated" market. This would inevitably have attracted the scrutiny of competition regulators.

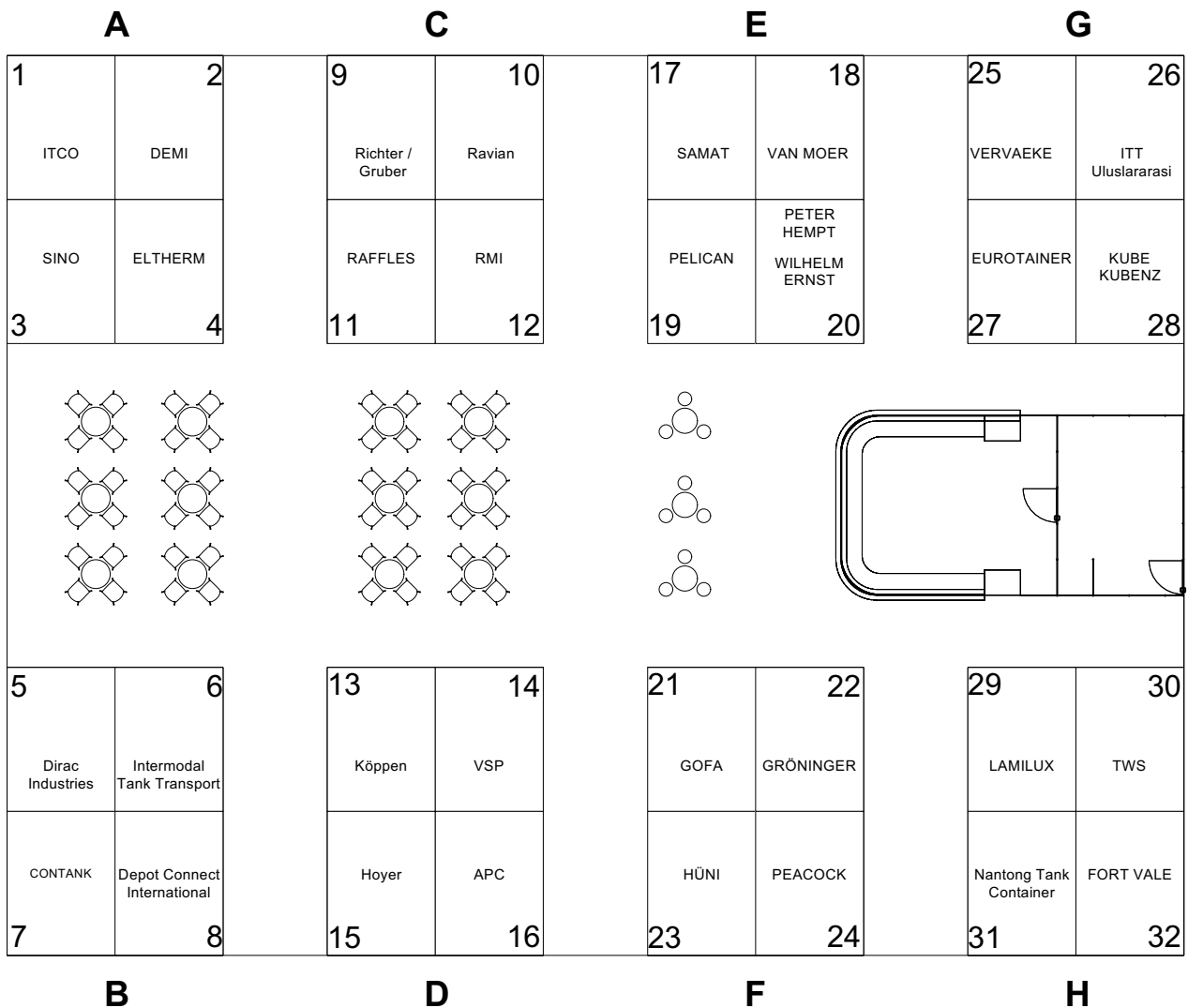
However, the market was not so concentrated that Textainer would have had a market share over the 30% threshold, another key metric used by the US Antitrust Division of the US Department of Justice.

In general terms, it is highly likely the container leasing industry has reached the point where a large acquisition or merger would be closely scrutinised by regulatory and competition authorities. ■

ITCO Tank Container Village

Munich, 2-5 June 2025

With just four months to go, arrangements are now in place for the ITCO Tank Container Village at transport logistic 2025 (Munich, 2-5 June).

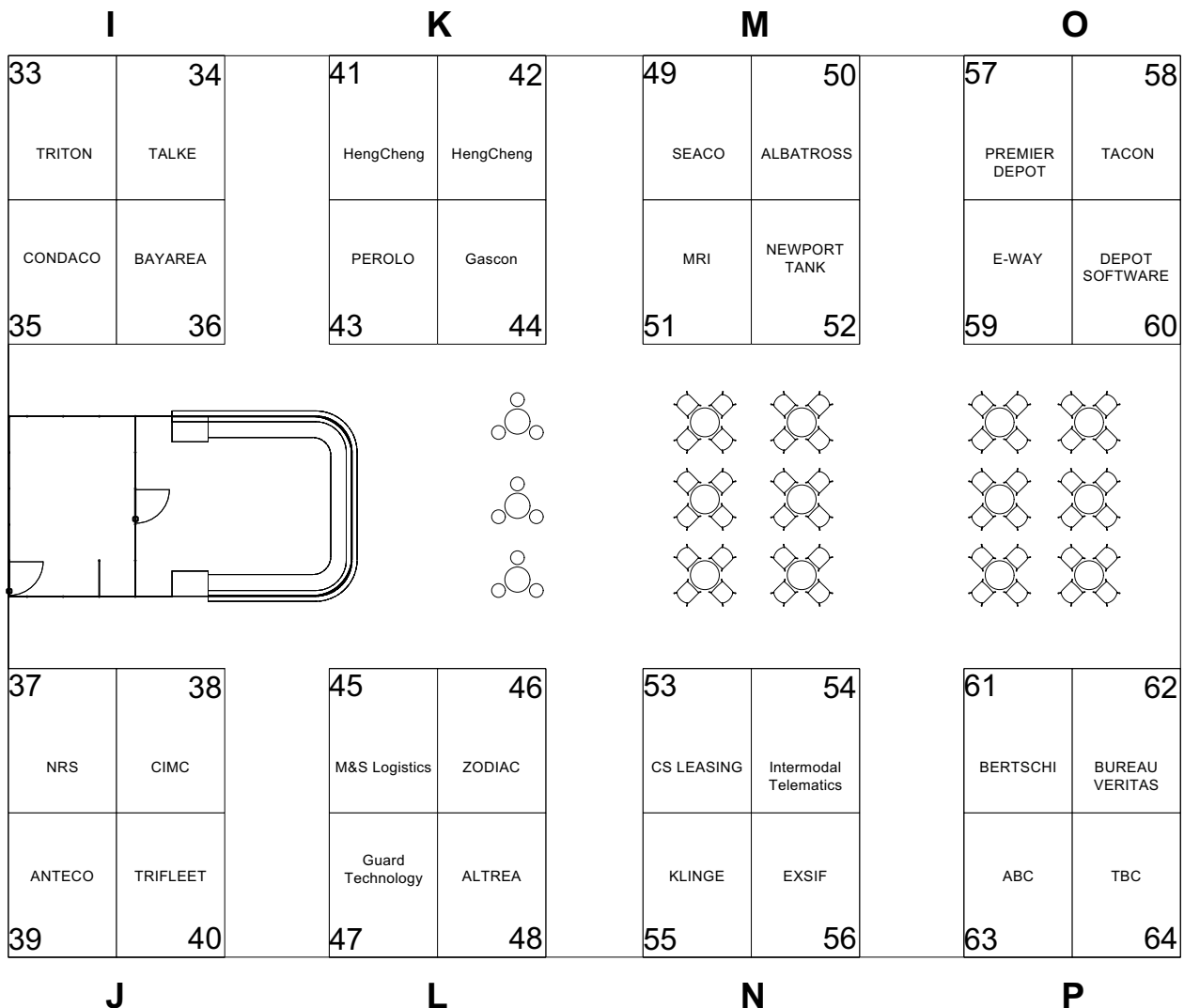


main aisle

at transport logistic 2025, Munich

- | | | | | | | | |
|----|------------------------------|----|-------------------------------|----|------------------|----|-------------------------|
| 1 | ITCO | 17 | SAMAT | 32 | FORT VALE | 49 | SEACO |
| 2 | DEMI | 18 | VAN MOER | 33 | TRITON | 50 | ALBATROSS |
| 3 | SINO | 19 | PELICAN | 34 | TALKE | 51 | MRI |
| 4 | ELTHERM | 20 | PETER HEMPT/
WILHELM ERNST | 35 | CONDACO | 52 | NEWPORT TANK |
| 5 | DIRAC INDUSTRIES | 21 | GOFA | 36 | BAYAREA | 53 | CS LEASING |
| 6 | INTERMODAL TANK
TRANSPORT | 22 | GRONINGER | 37 | NRS | 54 | INTERMODAL
TEEMATICS |
| 7 | CONTANK | 23 | HUENI | 38 | CIMC | 55 | KLINGE |
| 8 | DEPOT CONNECT INT | 24 | PEACOCK | 39 | ANTECO | 56 | EXSIF |
| 9 | RICHTER/GRUBER | 25 | VERVAEKE | 40 | TRIFLEET | 57 | PREMIER DEPOT |
| 10 | RAVIAN | 26 | ITT ULUSLARARAAL | 41 | HENGCHENG | 58 | TACON |
| 11 | RAFFLES | 27 | EUROTAINER | 42 | HENGCHENG | 59 | E-WAY |
| 12 | RMI | 28 | KUBE KUBENZ | 43 | PEROLO | 60 | DEPOT SOFTWARE |
| 13 | KOEPPE | 29 | LAMILUX | 44 | GASCON | 61 | BERTSCHI |
| 14 | VSP | 30 | TWS | 45 | M&S LOGISTICS | 62 | BUREAU VERITAS |
| 15 | HOYER | 31 | NANTONG TANK
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Tank Container Village

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- We are looking forward to seeing as many members and industry colleagues as possible over the four days of the event.
- To view the Tank Container Village Floorplan, download the floorplan below.

Visiting the Exhibition

- The ITCO Tank Container Village will again be located in Hall B4 of **the transport logistic 2025** Exhibition.
- If you are planning to visit **transport logistic 2025**, you will need an entry ticket
- All relevant information about transport logistic 2025 can be found on the event website: Transport Logistic 2025
- You will find details of: Visitor tickets, exhibition opening times, Visas for Germany, Munich travel and recommended hotels.





CONDACO CEO Dantz stays optimistic,



Thorsten Dantz, CEO of Hamburg, Germany-based tank container operator CONDACO, is channelling his inner 'glass half full' emotions as he considers the current market conditions and industry trends facing the tank container market in Europe, particularly in Germany. How does the more than three decades-old company manage to ride this economic tide?



navigating Germany's tank market

Dantz says: "Because of the bad European economy, all of our depots in Germany are very full with operator and leasing company tank containers." In contrast: "Luckily we have highly specialised tank depots able to handle almost all kinds of repairs, such as ASME R-stamp, MDI/TDI and coating, which helps a lot in having still good business."

With global supply chain disruptions and increasing container traffic through major ports like Hamburg, CONDACO is positioning itself to handle fluctuations in service demand.

Dantz said: "In Hamburg, we are not running just one depot. In total we operate three depots. Our major one is for tank container business. The other two are for dry box and reefer services – especially in regards to storage of laden containers (reefers, dry box).

"Additionally we run two more depots in the hinterland of Germany - Düsseldorf and Duisburg - to cover the container volume coming from China by rail and tanks coming from

Antwerp/Rotterdam due to the fact most of the depots are full in this region.

"Our main business always has been in modifications and conversions but the inquiries are increasing."

In a time of evolving safety and environmental regulations, such as stricter emissions or hazardous materials handling conventions, Dantz has a guarded reaction to many of the principles that may influence CONDACO's service offerings, especially tank cleaning and certified tank lining repairs.

He says: "We always follow the legal regulations but sometimes I doubt if all new safety regulations are absolutely necessary or just actionism."

Hiring and workforce development

When they meet, it takes business managers in many industries in Europe and around the globe a very short time for the →

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challenges of hiring or retaining skilled welders and technicians, particularly those certified for pressure vessels and specialised welding processes, to emerge.

The same can be said of Dantz: "Absolutely. It's almost impossible to find qualified welders - but not only welders. The major point is the low motivation to work. "Work-life-balance" has become very famous. For me it stands for 70% work / 30% life but not the other way round."

Given the growing demand for mobile repair services and on-site welding capabilities, he has developed some strategies to attract and retain qualified personnel. He said: "Easy answer - first find motivated employees. The rest comes automatically by getting them trained in welding or other in-service training courses."

Dantz clearly subscribes to Sir Richard Branson's quote, often paraphrased as "Train people well enough so they can leave, treat them well enough so they don't want to". This is said to emphasise the importance of investing in employee development and creating a positive work environment, arguing that the cost of not doing so is greater than the cost of training.

He said: "CONDACO offers mobile repair services and on-site welding globally. What could be more motivating - especially for young people - than to combine exploring the world with your work?"

While a thoroughly modern executive, Dantz has a wry look at the supposed developments in Artificial Intelligence (AI) and technology in those initiatives for upskilling his current workforce to adapt to emerging technologies in the sector. They can include automated inspections or digitalised testing in tank container maintenance?

He noted: "We are always open for new technologies but we don't forget: no automated inspection, no digitalised testing and no AI ever will be able to either indicate or judge a possible leakage of a gasket or corrosion damages."

Business growth and opportunities

With CONDACO's expansion into logistics and transport services, Dantz sees opportunities to offer fully integrated solutions to new markets or industries outside traditional tank container operators. He said: "With our expansion into logistics and transport services, we already offer fully integrated solutions next to the traditional tank container business. This we do mainly with dry boxes and reefers containers. We buy them in as-is condition, do the repairs



by ourselves and finally try to find potential buyers globally.

"As we are a member of GLA (Global Logistics Alliance) it helps to find cargo to ship our trading containers in laden condition to same country/city where our final container buyer is located."

Looking ahead, the most significant opportunity for growth within the tank container industry lies in geographic expansion. While the company already offers a comprehensive range of services, making the addition of entirely new service lines unlikely, the potential for strategic growth remains strong in untapped markets. Having established a solid presence across key regions in Europe, Asia -including China, India, and the United Arab Emirates - and Africa - such as South Africa, Ghana, and Ivory Coast - the company is now turning its focus to further expansion. Emerging markets in Saudi Arabia, Turkey, and parts of East Africa represent promising opportunities. By leveraging existing expertise and infrastructure, the company aims to strengthen its global footprint and meet increasing demand in these developing regions. Strategic partnerships and localised operations will be instrumental in capturing market share and delivering value-added services in these high-growth areas.

Liberation Day bombshell

On April 2, 2025, while this article was being written, President Donald Trump announced a series of tariffs referred to as 'Liberation Day.' This shock to the established world trading order detonated like a grenade. Its repercussions will be visible for years to come. While the situation was one way at time of writing, such is the mercurial nature of Trump that it is impossible to know the likely situation when the article is read.

These measures included a universal 10% tariff on all imports, effective April 2025, and additional country-specific tariffs. For instance, imports from the European Union faced a 20% tariff, Japan 24%, and China 34%, which, combined with existing tariffs, resulted in a total of 54% on Chinese goods, later raised to 104% and then again to 125%.

Impact on chemical companies

The chemical industry is particularly sensitive to these tariffs due to its integrated global supply chains. Many chemical products cross international borders multiple times during production. The American Chemistry Council (ACC) has expressed concerns that the 10% duty applied each time products cross the border will increase production costs and consumer prices. ➔



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Furthermore, the Alliance for Chemical Distribution (ACD) highlighted that increased tariffs and potential retaliatory measures could strain the supply chain, impacting the industry's ability to support various manufacturing sectors.

Effect on ocean tank containers

Deep sea tank containers, essential for transporting bulk liquids and gases between continents, are integral to the chemical industry's logistics. The imposition of tariffs is likely to disrupt logistics in several ways resulting in increased costs as tariffs on imported chemicals and related products will raise the overall cost of goods transported in tank containers. Companies may seek alternative routes or suppliers to mitigate tariff impacts, leading to potential changes in shipping patterns and container utilisation. The need to navigate new tariff regulations and possible retaliatory measures from other countries could result in customs delays, affecting delivery schedules.

In summary, the 'Liberation Day' tariffs could significantly impact chemical companies and the use of deep sea tank container routes. Businesses will need to adapt to increased costs, re-evaluate supply chains and anticipate changes in import volumes as they navigate this evolving trade landscape.

Navigating the situation

When Klaus Dantz founded CONDACO in the late 20th century, he based the move on a life-long career spent in the container industry. Starting as a mechanical engineer at Hapag shipping line, he later worked at SEACO, formerly known as SEA Containers. Now away from company, he may have shared his son's comments on 'Liberation Day.'

Thorsten Dantz said: "It's a horrible scenario. I have no idea how this will influence the market - but most likely not in a positive way. All decisions made by Mr Trump for now seem to be made arbitrary. So maybe he will take back or modify them a bit at a later stage as even the Republicans mostly don't share his decisions. His way of politics will "make America poor again" in the long term.

"For us, the USA never had been a big business market - we prefer Europe and Asia."

He is at a loss as to what the EU should do response. "I can't answer this question in two or three sentences. Europe in general depends on the USA. Not only economically - also as a NATO partner. Trump is not the only European problem. We also have an existing problem coming from the East. So the EU cannot isolate themselves from all major countries like Russia, China and the US."

Asked about matters nearer to home, Dantz is quite strong in his comments on German industry and business leaders have reacted to the move?

He said: "Just have a look at the stock market - then you know."

Business background

CONDACO & KTD-M GmbH is a globally active company specialising in container trading, inspection, and services. The business was initially established by Klaus Dantz as CONDACO, an expert firm in containers. In 2010, KTD-Mobilbox GmbH was founded to expand into container trading. Both entities merged in 2014 to form CONDACO & KTD-M GmbH, concurrently launching a container depot in Hamburg with a 4,000 TEU storage capacity.

By 2016, CONDACO China was established to provide new build inspections across all Chinese container manufacturing facilities. In 2017, the company opened its own tank container workshop in the Port of Hamburg and founded CONDACO South Africa to expand inspection and survey services.

In 2018, the company attained ISO 9001 certification, underscoring its commitment to quality. The international footprint grew further in 2020 with the launch of Condaco Brasil Ltda, focusing on container surveys and technical support.

CONDACO offers global sales, leasing and procurement of all container types, including tank containers, supported by an extensive worldwide network. Its Hamburg facility ranks among the city's leading container workshops. ■





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Elycold is available in glossy or satin surfaces, and the colour can be personalised based on your request, including RAL code, NCS, or even customised colors. Thanks to Brianza Plastica's know-how, the company is able to offer a fast and cost-effective solution for customising your rolls and sheets.



Figure 1 Colours of Brianza Plastica's GRP can be personalised based on your request.



Figure 2 Elycold GRP rolls in different colors

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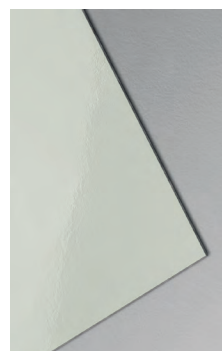


Figure 3 Elycold std glossy white

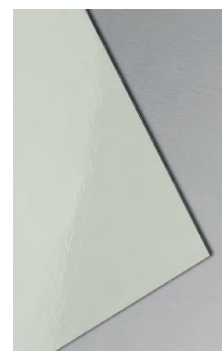


Figure 4. Elycold Extra-Glass glossy white



Figure 5. Elyplan Extra-Glass



Range Of GRP Laminates For Tanks

Join us at transport logistic

Brianza Plastica will attend transport logistic in Munich, from 2nd to 5th June 2025. It is the world's leading trade fair for logistics, mobility, IT and supply chain management. Andrea Bollani, Regional Sales and USA Development Manager, will be pleased to welcome you at the booth, at Hall B2, Stand 419. Don't miss the opportunity to discover how Brianza Plastica is driving innovation and how we can help your business take a step further.

Brianza Plastica offers a 360° service, from new product development to providing the right product for your requests, from customised colour to material testing. Elycold and Elyplan are manufactured in Italy and shipped all over the world. The company is able to satisfy all requests, from the smallest to the biggest customers, from manufacturers to sellers of spare parts for tank container vehicles.

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E-WAY/ITM aims to be a Top 5 operator



The steady expansion of Malaysia-based ISO tank container service provider E-WAY Group since 2007 has been underpinned by experience, flexibility, rapid decision-making and real-time information - essential virtues in the current uncertain times. Felicity Landon spoke to Jeroen Govers, E-WAY's Managing Director, North Europe, about digitalisation, investment and the emergence of new cargo flows.

Change happens – and companies must respond accordingly. The E-WAY Group has navigated the ups and downs of the market for the past 18 years, navigating its way through the global financial crisis, the Covid-19 pandemic and a range of geopolitical challenges. Today, it is responding to the unpredictable world of tariffs and trade wars. “We see a lot of uncertainty,” said Jeroen Govers, Managing Director, North Europe. “Of course, US trade lanes are most affected by President Trump’s tariffs. However, while a lot of our business is in Latin America, Europe and Asia, even there everyone is waiting to see what will happen, what the next couple of months will bring.”

Even the largest of its customers have no certainty what is going to happen next – and E-WAY can’t provide any clear answer either. “We are seeing constant changes. It’s a case of ‘wait and see’ - but certainly there will be changes in cargo flows.”

E-WAY's background

E-WAY owns and operates a fleet of 22,000 tank containers and operates in more than 50 countries across Asia, Europe, South America, the Mediterranean, the Middle East, Indian Subcontinent and Africa regions. As well as the head office in Malaysia, E-WAY has offices in China, India, Indonesia, the Philippines, Singapore, South Korea, Thailand, Saudi Arabia and the UAE. Govers runs the Europe office in Antwerp and the company has representatives strategically located around the world.

Founders and owners Ken Gui (Group Executive Chairman) and Lawrence Lee (Group Executive Officer) had experience working as agents for various tank operators when they decided to strike out alone in 2007. The journey began from ‘ground zero’, evolving and expanding over the years. As well as owning and operating tanks containers, E-WAY has a fleet of general purpose containers, backed by global forwarding expertise.

“The founders first started their own agency, then took a leap of faith and invested in their own equipment – 200 tank containers to begin with,” says Govers. “They started from nowhere with no bank loans and no shareholders. The company is still owned by the two founders – as a result, they can make quick decisions. From my point of view, I can discuss rates and negotiations directly with the founders, without having to get through 20 layers in between.”

ITM (Isotank Management) brand

The E-WAY tanks are operated under the ITM (Isotank Management) brand, a Singaporean subsidiary which is 100 per cent E-WAY and shares the logo with the global E-WAY brand.

Customers are typically chemical producers, distributors and traders, and food distributors – about a quarter of the fleet is food grade. Most of the larger chemical companies work on the basis of long-term contracts for a year or 18 months, but there is also a significant level of spot business – some to meet the needs of traders looking to resell product, and some for one-off movements of specific loads. ➔

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A flexible approach

"We are very flexible in our approach," says Govers. "Most tank container operators will want to do door-to-door moves, staying in full control. Certainly, our core business is door-to-door or door-to-pier. However, we have many customers who just want a tank container at a certain fixed rate and they want to take charge of the loading, freight, trucking, etc.. We are flexible in that the customer can get whichever part of the service they want. For example, a customer might want to do a one-way rental from Antwerp to Shanghai – we would pick up the tank container in Shanghai. We also offer longer-term leases where the customer wants a tank container for two years based on a daily cost, then it is returned to us. When it comes back to us, it must be fully prepped and cleaned – we would expect it to be fully usable again in the same condition."

E-WAY has an experienced team of professionals who have been working in the tank container industry for many years, he says. "We work with an operating system built in-house and try to enter as much information as we can into this. For example, loading sites have many requirements, and we ensure we gather that information. We work with third-party hauliers who are specialised in tank containers. It is the same with the depots – all the ones we work with are well-established, dedicated tank container depots that we know well. When we need to load, our in-house experience means we can identify a place that meets the requirements."

Strong EcoVadis rating

In Europe, tank container cleaning, repair and servicing is outsourced to depots in Antwerp and Rotterdam with which the company has long-term relationships. "We work to the highest safety standards and only use depots that work to the same standards. In Europe, we only use EFTCO-approved cleaning stations. In terms of sustainability and social values, we have a range of certifications, including a strong EcoVadis rating.

"As for safety, there is nothing 'standard' about safety in this industry. There are guidelines for safety measures that we all follow and we can never take that for granted."

E-WAY's global network and operations is based on a bespoke operating system, built and maintained in-house by the company's own IT team – a project that has involved years of time, money and effort. The system is designed to streamline operations – managing large volumes of data and enabling process automation.

Carriers' departure and arrival dates are monitored, so that there is real-time visibility on the whereabouts of all tank containers. "This means that if, for example, we need more tanks in Singapore, one click on the button can tell us what's on the way and where it is. That's the whole game – where do we need tanks, where do we have tanks, and how can we bring the two together. It's a constantly changing jigsaw puzzle."

Bespoke GPS tracker

The IT team has developed and built a bespoke GPS tracker; following a test phase, this is now being produced in quantity. "The trackers enable us to see, via our own portal, where all the tanks are and all the parameters we need. The test phase is nearing completion and we are ready to roll out the trackers across the fleet. It will take time to fit all the tanks with GPS but

the battery pack in the tracker has a ten-year life so, once they are fitted, they should not need any attention unless there is damage."

Embracing AI; eliminating Excel

The focus on digitalisation is crucial in the drive to simplify logistics, says Govers. As well as including the GPS tracking feature, the in-house system provides real-time updates on shipping and logistics processes, streamlines workflows and incorporates Internet of Things (IoT) devices, data mining capabilities, web and mobile applications and the latest AI tech. A customer portal gives access to bookings and real-time cargo locations, and a ChatGPT powered chatbot is being incorporated for instant quotations and service assistance.

"There is a lot of Artificial Intelligence (AI) implementation in the system already," says Govers. "For example, depot reports are read and processed by AI, which updates everything in the system. Tracking and tracing and invoicing are all done automatically through AI. We are automating as much as possible – this has taken away hours of repetitive manual work, eliminating Excel!"

Future plans include investing in IoT devices featuring thermometers, inclinometers and leaking sensors, to provide accurate cargo status information.

Cargo flows

Cargo flows ebb and flow and new product types emerge – sustainable aviation fuel being one of them. "There will always be new imported products that everyone will chase, but it is difficult to predict what these will be. However, we are seeing the push for more sustainable fuels, with huge flows of used cooking oil and waste materials for the production of sustainable fuel, particularly from the Middle East and South-East Asia into Rotterdam. During the Covid pandemic, we saw some completely different flows – for example, the demand for hand sanitiser meant you couldn't get Isopropyl alcohol fast enough."

Asia Pacific's #3 High Growth Company

E-WAY has earned two recent accolades: the Straits Times ranked the company second in Singapore's Fastest Growing Companies 2024, and the Financial Times ranked it third in Asia Pacific's High Growth Companies 2024.

Goal is to be a Top 5 global operator

E-WAY claims seventh place in the global league of largest tank container fleets. Investment continues – most recently in a trucking fleet to serve the Indonesian market. "We intend to keep investing and discussing are ongoing," says Govers. "At the moment there is a bit of a pause because of the uncertainty in the market; no one really knows what is going to happen, so at present there is no real demand for new equipment.

"We have never bought more tanks just to be bigger – we always follow the customers. However, our clear goal is to be in the top five in the ITCO (International Tank Container Organisation) list within the next five years. This is not a dream – it is what we want to achieve." ■

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The Tank Container Development Alliance

1. What is the TCDA?

The TCDA (Tank Container Development Alliance) was established in August 2014 when it put its understanding of the tank container industry, and the needs of its members, through the organisation's unique operating system and channels to build a specialised, international service platform for the tank container enterprises.

TCDA has evolved into a premier third-party commercial service platform specialising in the tank container industry. By leveraging its industry insights and understanding of user needs, and through its unique operational framework, TCDA has progressively developed a comprehensive and efficient membership service system.

So far, the platform has more than 260 members from 15 countries and regions worldwide, including China, Singapore, Malaysia, Thailand, Vietnam, Indonesia, Sri Lanka, India, Dubai, Pakistan, Oman, Turkey, Spain, Canada and Russia, covering 15 key fields such as tank container manufacture, spare parts, leasing, operator, forwarder, logistic, depot, tank container technology and inspection, etc, making it the largest tank container industry enterprise service platform in Asia!

2. Why was it set up?

It first started in 2009 when the founder and CEO of TCDA, Mr. Walker, joined the VOTG in China and COSCO joint venture. As a newcomer to the industry, the logistics model for the tank

container industry was unfamiliar so I used my university of IT computer professional background and founded the first online Bulletin Board System service for the tank container industry with a view to creating the opportunity to share, learn and communicate.

In August 2014, Walker officially founded the Tanklink company to try to commercialise the tank container enterprise service platform. Today, after eleven years of platform operation, TCDA now has more than 260 global members from 15 countries and 15 industry fields. The members can be found at www.isotank.cn. The standard annual membership fee is \$500 and VIP membership fee is \$1,651. →



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- Provided global tank container market input for many investment decisions
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- Produced world study of the tank container market and its players
- Identified tank container M&A targets
- Independent review of investment proposals for depots/cleaning stations
- Headline international keynote speaker at CIMC Symposium
- Produced quarterly 'Middle East Tank Container Market Review'
- Founding Editor, *Tankcontainer Magazine*

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3. What are the benefits of membership?

TCDA
Tank Container Development Alliance

TCDA Service

- Platform Service
- Training Camp
- Member Salon
- Member Conference **2024.03.14-15 Shanghai**
- Industry Report
- Co-Exhibitors **2024.06.25-27 Shanghai**
- Co-Marketing

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02 Online Service

TCDA Web Service
(Member companies online display platform / product / service / contact)
 (Member search, quick retrieval of tank container enterprise resources / Online Tank Container Courses)

Social Media Push
(Tank container industry news push / New members push / Member supply and demand information push (News/Products/Services/Recruitment...))

Wechat
LinkedIn

Weekly E-newsletter
(E-newsletter for member to collect and push tank industry status)

03 Member Directory

Started in 2017 and printed annually

04 Offline Service

- **Membership Salon**
 Regularly organise members' salon activities - make friends in the circle, deep-level, multi-latitude offline activities to show, and share each other's experience in the operation of tanks.
- **Training Camp**
 Industry talent growth plan, tailored for TCDA platform members, including Tank operation/Tank Depot/Tank Safety courses etc.
- **Membership Conference**
 We especially for the TCDA platform members to organize tank container industry upstream and downstream of the very professional exchange of ideas, to create the industry's most influential conference!

Other events are organised e.g., joint exhibition projects for members, such as the TCDA Village in Transport Logistic Shanghai in June 2024. ➔

4. What are the main differences between the International Tank Container Organisation (ITCO) and TCDA?

As an authoritative non-profit organisation in the global tank container industry, ITCO has always been the cornerstone of our highly respected industry and our role in the tank container industry cannot be compared to it.

I believe that the two organisations are complementary and symbiotic in promoting industry development in the following ways: firstly, ITCO builds an industry standard foundation, and we focus on promoting regional market applications.

ITCO's professional contributions in the fields of tank manufacturing specifications, safety guidelines, inspection standards, etc. have built an irreplaceable foundation of trust for the global industrial chain. It is based on the international standard system, established by ITCO, that enterprises from various countries can achieve mutual recognition of technology and smooth container transportation.

Our positioning is a business service platform rooted in the Asian regional market - through member network building, industry training, supply and demand docking, and other services, we help local enterprises more efficiently understand ITCO standards, apply tank container technology and expand business opportunities. Simply put, ITCO is the most influential developer of tank container industry guidelines, among other important tasks and representations, while we boost standard implementation and strengthen the industry's social ecology. ITCO, with its academic rigour and international credibility, continues to produce industry white papers and technical guidelines with global influence while we focus more on the "human connection" of tank container industry practitioners through offline events such as annual membership conferences, regional themed events, and cross-border visits. We build an experience-sharing platform for tank container industry practitioners by providing customised consulting services, talent training, and other products, thereby helping tank container enterprises improve operational efficiency. This social attribute and resource integration ability are exactly where the service value of our platform lies.

In summary, we believe ITCO is like a "legislative organisation" in the tank industry, ensuring the standardised development of the global container ecosystem with professionalism while we are a 'business platform' that accelerates the flow of industry resources through market-oriented services. Both parties continue to create value for the tank industry in their respective fields and jointly promote the globalisation process of tank container applications.

During the Shanghai station of the 2024 Munich Logistics Exhibition, we had in-depth discussions to explore the collaborative mechanism between ITCO international standards and TCDA regional service network and we hope to promote the healthy development of the industry ecosystem with the strategic support of ITCO.

5. What are the tank container market trends in China now?

At the recently concluded 2025 TCDA Membership Conference in April, the following trends were mentioned by both domestic and international tank enterprises: China has become the core market for global tank container manufacturing and operation, with new tank container production capacity accounting for over 90% of the world's total. This is driven by the upgrading of chemical logistics safety standards (replacement of barreled/tanker), the expansion of the new energy industry chain (such as transportation of liquid hydrogen/lithium battery materials) and the infrastructure demand of countries along the "Belt and Road" initiative.

There are also structural changes in the industry such as a transitioning from single manufacturing to full lifecycle services while the proportion of value-added services such as leasing, maintenance and digital management has increased. Also apparent is the growth of small to medium-sized tank container operators in Southeast Asia, especially in China, India and Middle East. They fill segmented markets through flexible operating models and promote industry decentralisation.

Also considered was the global opportunities for China's tank container operators. These include the opportunities spilling out from the multinational chemical giants' supply chain restructuring, which is driving regional market growth. Leading chemical companies in Europe and America are accelerating their capacity and supply chain transfers to emerging markets in the Asia Pacific region (such as China and Southeast Asia). This is consolidating China's hub position in the global tank container logistics network and injecting sustained growth momentum into the industry. There is also the dual-track parallel globalisation of production capacity and localisation of services.

The Chinese container industry has responded to domestic structural capacity adjustments by actively going global - the rapid expansion of chemical production capacity in Southeast Asia, the Middle East and other regions has generated incremental demand. Typical cases include Wanhua Chemical's localised production base in Europe and Xinzhou's European factory for electrolyte materials, which have encouraged Chinese tank container enterprises to upgrade from a single export model to a 'localised manufacturing + terminal service' model.

Also noteworthy is the building of global service resilience through so-called light asset operations. Chinese tank operators have established cooperative alliances with international mainstream tank operators and lessors to reduce overseas business risks through a 'light asset resource integration + heavy operational capability output' model. For example, relying on their channel control advantages in the chemical logistics field, they embed core services such as tank container asset management and digital operation and maintenance into the global network of international partners to achieve risk sharing and benefit sharing. ■

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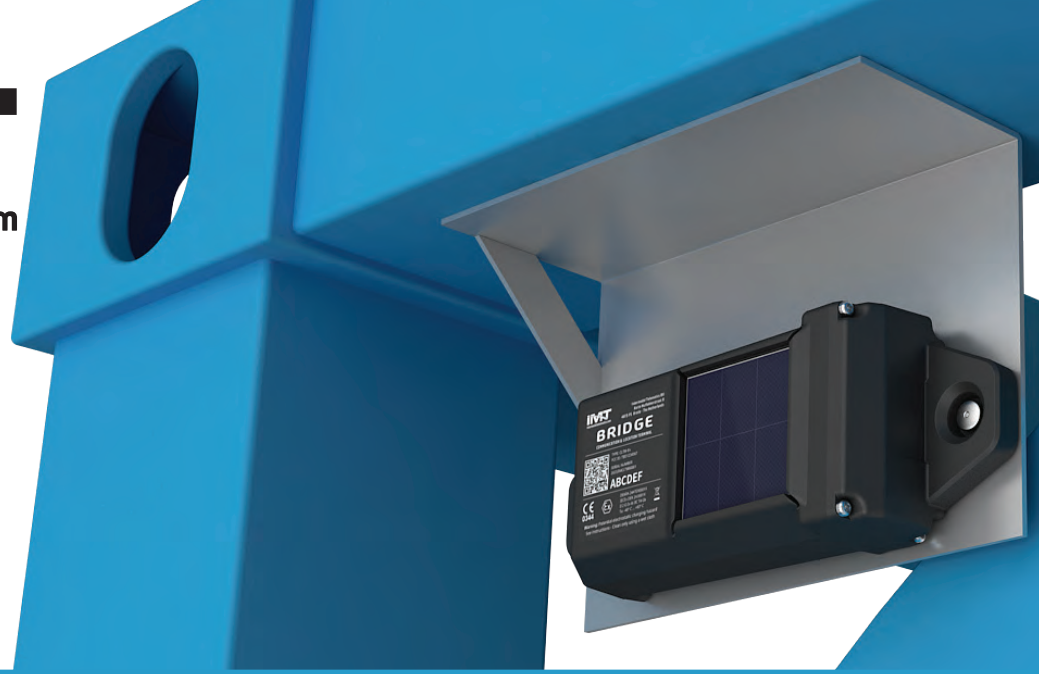
Next ITCO Events in 2025

- Tank Container Village at transport logistic 2025 - Munich, June 2025
- ITCO 2025 Annual Members Meeting - Singapore, November 2025

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