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Tankcontainer MAGAZINE

Van Moer Logistics is growing and its secret of success is rooted in the entrepreneurial spirit and raw determination of its founders, **Jo Van Moer** and his wife, **Anne Verstaeten**.

Van Moer Logistics:

a story of adversity, determination, success

inside Volume 12 | Issue 4 | December 2025

Tankcontainer MAGAZINE

Low expectations
for 2025

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This stability, however, is at too low a level for some operators to be profitable and, without any significant strengthening in the market, their **cash flows** will be stressed and delayed payments inevitable.

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Low expectations *for 2025*

Despite the fundamentally difficult market conditions in today's tank container market, stability seems at least to be the order of the day, with a hoped-for seasonality boost in the final quarter. This stability, however, is at too low a level for some operators to be profitable and, without any significant strengthening in the market, their **cash flows** will be **stressed** and delayed payments inevitable. Suttons acquisition by Stolt-Nielsen acknowledges its struggles in sustaining a sub-scale, barely profitable, family-owned, tank container operator business in today's market conditions.

Low volumes are the problem but describing the market as stable is deceptive. Beneath the surface, competition is fierce in both operator and lessor segments with some seeking to sustain their all-important cash flow at, literally, all costs. The leading operators are more secure but are still having to work hard to be profitable, with net profitability unlikely to exceed 5% for the overall year.

Encouragingly, volumes have recently risen slightly, and there are localised hot spots where business is good, but the chemical industry expects this trough to continue for the next two years.

A notable feature of the market is the rate at which tank container trade patterns are shifting. Chemical plant closures - especially in high cost Europe - is one driver, another being the increasing amount of information that producers and consumers are required to digest every day, not least on the implications of the weaponisation of US trade policy.

As always, volatility and uncertainty have benefits for those tank container operators nimble enough to capture unpredictable demand, although these do not outweigh the benefits of a normally-functioning market.

On the positive, uncertainty and/or port disruptions boost demurrage revenues, a key source of profitability for operators, and tank container manufacturers are offering equipment at low prices, stimulating the purchasing of new builds.

Leasing

In the tank container leasing market, the $1.8 billion sale of Global Sea Containers **(Seaco)** by heavily-indebted Bohai Leasing continues to grind through the ten global jurisdictions with regulatory and antitrust oversight of its operations. On completion of the sale to Typewriter Ascend, an affiliate of **Textainer** (owned by US private equity major Stonepeak), Bohai Leasing will exit the container leasing market.

Bohai has faced financial difficulties due to its owner, HNA Group, becoming bankrupt in January 2021 after accumulating China's largest corporate debt of over $82 billion, before being restructured by the Chinese government.

Bohai will probably use the proceeds of the debt to pay down its expensive debt - the company borrowed $1 billion in August 2024 to repay Bohai's Global Aircraft Leasing's outstanding $1.9 billion of senior unsecured notes, which was due the following month. The initial 364 day extendable term loan was at a fixed interest rate of 11.25%, compared to global average interest rates of 5.5-6%.

Likely profitability of tank container operators?

On Page 20, we continue our analysis of the tank container operator sector using Porter's well-known 'Five Forces' model, beloved of business schools and company boardrooms. The model is a simple but powerful way of understanding the **attractiveness** and **likely profitability** of companies competing in a particular sector.

Our current focus on the tank container operator sector follows on from a similar analysis of the tank container leasing market in 2018 *(available free from lm@chemicalmanagement.co.uk)*.

In September's issue, we analysed the extent to which the assets and services of tank container operators could be substituted and concluded that the threat of substitutes for the products and services offered by tank container operators is low and therefore the power, or force, of these potential alternatives was weak. This was a positive signal on the attractiveness and potential profitability of the tank container operator sector.

In this issue, we consider the second of Porter's Five Forces: the bargaining power of buyers i.e. what strength have chemical and foodstuff producers got over tank container operators when they buy their services?

If the negotiating power of speciality chemical producers like BASF, Dow Chemical, SABIC and Infineum is high, tank container operator margins come under pressure. If the buyer's negotiating power is lower, there is more opportunity for tank container operators to make fair and sustainable returns, part of which will be available to reinvest back into the business to meet the future needs of customers.

March's *Tankcontainer Magazine* will focus on Porter's third force: the threat of new entrants into the tank container operator market, to be followed by an analysis of supplier power (how easy is it for tank container manufacturers - and the lessors providing equipment to operators - to increase their prices and per diems?). The analysis concludes with the fifth force, the competitive rivalry among tank container operators.

March's issue will also feature the widely-anticipated tank container **'Review of the Year 2025'** and will have a **special feature** on the tank container market in the **Middle East**.

All in all, something for everyone.

Finally, we wish you and your families a well-earned seasonal break and thank our many contributors, advertisers and subscribers for their support during the year. As Benjamin Franklin once said: "An investment in knowledge always pays the best interest".

Leslie McCune, *Editor*

ADECON launches new service with periodic ISO-tank inspections in full compliance with international regulations

ADECON has launched a new periodic ISO-tank inspection service in full compliance with international regulations, positioning itself as one of the few depots in Poland to offer the complete range of these specialised services.

The company conducted its first technical inspection of an ISO tank container at its Dębe container terminal, meeting all international standards for the transport of dangerous and specialised goods.

Regulatory Compliance and Service Scope

According to international regulations, including RID/ADR and IMDG standards, each tank container must undergo mandatory technical inspections on a prescribed schedule. The regulatory framework requires intermediate inspections every 2.5 years and comprehensive periodic inspections every 5 years to ensure continued compliance with safety and operational standards.

ADECON now offers both inspection categories, providing customers with a complete solution for regulatory compliance within the Polish market.

Partnership and Technical Capabilities

The inspection services are conducted in cooperation with Bureau Veritas, one of the few certification bodies with full international accreditation and technical expertise in this specialised field. ADECON provides the depot infrastructure whilst acting as the direct service provider, managing the entire operation on behalf of customers.

The company's technical capabilities extend beyond basic inspection requirements, with ADECON offering pre-inspection checks designed to detect potential issues or non-conformities in advance of official inspections. This proactive approach helps customers address any concerns before formal assessment procedures begin.

Integrated Service Offering

ADECON's service portfolio includes on-site repair and servicing capabilities, carried out with customer approval without requiring tank relocation to alternative facilities. The company also provides integrated tank cleaning services, offering customers a comprehensive solution that consolidates multiple requirements at a single location, reducing both time and operational costs.

All services are available at the ADECON Depot facility in Dębe, near Kalisz, which provides convenient access to specialised infrastructure, trained personnel, and round-the-clock support capabilities.

Market Position and Target Customers

The new service offering targets tank owners and tank operators seeking reliable partners for inspections, maintenance, cleaning, and comprehensive support services for ISO tank containers. ADECON's entry into this market segment reinforces Poland's growing capabilities in specialised logistics infrastructure and compliance services.

The launch represents a significant expansion of ADECON's service capabilities and strengthens the company's position within Poland's container logistics sector, particularly in the handling and maintenance of equipment used for dangerous and specialised cargo transport. ■

Den Hartogh establishes operations at Sundsvall Logistics Park

Royal Den Hartogh Logistics is expanding its presence across Scandinavia with the establishment of a new Logistics Service Centre in Sundsvall Logistics Park, recognised as one of Sweden's most modern and sustainability-certified transport hubs.

From this new base, Den Hartogh will provide sustainable and safe logistics solutions for liquid chemicals, gases, food and dry bulk products. The investment supports the company's ambition to create a chemical logistics cluster in northern Sweden, with Sundsvall positioned as a central hub for connections across Scandinavia.

Strategic Hub with Sustainable Infrastructure

Sundsvall Logistics Park offers a distinctive combination of direct access to rail, road and sea transport links, alongside a strong focus on environmental performance. The hub has achieved CEEQUAL certification, underlining its commitment to climate-smart infrastructure and long-term regional development.

Fredrik Kimfors, Managing Director Scandinavia at Royal Den Hartogh Logistics, commented on the expansion:

> *"Sundsvall offers the perfect base for us in northern Sweden. It combines excellent logistics infrastructure, proximity to both port and rail terminals, and a shared vision of sustainability. Together, this creates the right conditions for smarter, greener and safer transport."*

The establishment of the new facility represents Royal Den Hartogh Logistics' continued commitment to expanding its operational footprint whilst maintaining its focus on sustainable logistics solutions across the Nordic region. ■

Zodiac Tank Container Terminals expands capacity at Nhava Sheva

Zodiac Tank Container Terminals Private Limited, part of the Samsara Group, has announced the inauguration of an additional three acres of fully paved yard space at its Nhava Sheva facility. This expansion increases the total storage yard capacity to nine acres, enabling the terminal to safely accommodate up to 1,250 TEUs.

With this development, Zodiac Tank Container Terminals now operates the largest ISO tank container terminal and depot facility in India. Further growth is already planned, with an adjacent three-acre plot currently under development. Scheduled for completion in 2026, this will bring the site's total capacity to 12 acres.

Operational for the past four years, Zodiac Tank Container Terminals remains the only facility in India accredited with IMS certifications ISO 9001:2015, ISO 14001:2015, and ISO 45001:2018. The company provides a full suite of services for all types of ISO tank containers, reinforcing its position as a trusted partner in the industry. ■

For more information visit **www.zodiacterminals.com**

Leschaco Strengthens Dangerous Goods Logistics with New Chemical Multi-Purpose Facility in Bremen, Germany

Bremen, Germany | October 2025: The Leschaco Group has expanded its logistics infrastructure with the commissioning of a new chemical multi-purpose facility in the Bremen Industrial Park, reinforcing its capabilities in the LCL (Less than Container Load) and GCL (Global Contract Logistics) segments. The investment reflects Leschaco's continued commitment to providing safe, efficient, and sustainable logistics solutions - particularly in the handling of hazardous materials.

The new logistics centre covers a total area of around 20,500 m² and offers over 12,000 pallet spaces in the contract logistics section, as well as 6,500 additional spaces in CFS operation. An integrated container packing station, 27 loading ramps and 9,500 m² of block storage space complete the modern infrastructure for flexible logistics solutions. It is equipped with a barcode-based warehouse management system, SOLAS VGM certification, and optimized workflows for export, import, cross docking, and storage.

These features ensure high levels of process transparency, operational efficiency, and regulatory compliance.

A key differentiator of the site is its dedicated hazardous goods infrastructure. Twelve standalone storage units outside the main building provide an additional 2,000 m² for the secure handling of chemicals and dangerous goods, including lithium-ion batteries. The facility complies with stringent WGK and LGK classifications and has been awarded the DGNB Gold certification for sustainable construction—highlighting its energy efficiency and environmental performance.

"The new distribution warehouse in Bremen is designed for dual use as a container freight station and warehouse. It represents a significant milestone for our LCL and GCL product lines," says Sebastian Haebler, Head of Global Contract Logistics at Leschaco. "Its strategic location between the ports of Hamburg, Bremerhaven, and Wilhelmshaven, combined with our new site in Moerdijk,

Netherlands, enhances supply chain flexibility and proximity to Europe's key logistics corridors."

Kai Chladek, Head of Global Product Management LCL, adds: "This facility significantly enhances our LCL service offering, particularly for hazardous cargo. With its advanced infrastructure and integration into our global network, we are well-positioned to deliver reliable, compliant, and scalable solutions to our customers across industries."

The new Bremen facility is part of Leschaco's broader strategy to align infrastructure investments with evolving customer needs, regulatory requirements, and sustainability goals - ensuring long-term competitiveness in the global logistics landscape. ■

Masterbulk acquires the activities of EOC Logistics

EOC Group has announced the transfer of the logistics activities of EOC Logistics to its external transport partner, MASTERBULK. This strategic decision enables EOC to strengthen its focus on its core activities: innovating, producing, and selling high-quality chemical products.

The logistics sector continues to evolve rapidly, driven by growing demands for flexibility, sustainability, and transparency, alongside increasing regulatory and technological challenges. As a result, logistics has become a highly specialised field requiring dedicated expertise and ongoing investment. "At EOC, we are committed to quality and efficiency in everything we do," said Gerard Marsman, CEO of EOC. "We believe that working with a partner whose core business is transport logistics allows us to better serve our markets by focusing on innovation, production, and customer centricity within our area of expertise: chemistry."

As of 1 October, MASTERBULK has officially taken over the existing operations of EOC Logistics. The fleet of 90 specialised trailers and all employees have been fully transferred to MASTERBULK. Staff members will continue to work at the same facilities in Oudenaarde and Evergem, maintaining their current roles to ensure full continuity. Logistics services for EOC will therefore remain at the same high standard.

"With this acquisition, MASTERBULK reaches a new milestone in our growth path, where, as at EOC Group, specialisation and quality are the primary driving forces," said Filip Slock, CEO of MASTERBULK.

This collaboration represents a shared commitment by both companies to excellence and efficiency, reinforcing their positions as trusted leaders within their respective sectors.

For more information visit
www.masterbulk.eu ■

Stolt Tank Containers wins supplier recognition award in South America

Stolt Tank Containers has been honoured with the 2024 Supplier Recognition Award in the International Logistics category for South America. The award, presented by Indorama, a global industry leader, recognises outstanding performance, innovation, and contributions to creating a more sustainable and efficient supply chain.

This recognition represents more than an accolade for STC; it serves as validation that the company is pursuing the right strategic direction in the Americas region. The award also provides an opportunity to acknowledge the fundamental drivers of the organisation's success: its workforce, corporate mission, and unwavering commitment to excellence.

Regional Achievement with Global Significance

STC was selected from a diverse pool of logistics providers spanning multiple transport modalities, extending well beyond tank containers. This cross-sector recognition reinforces the company's long-held philosophy that excellence is determined not by what is transported, but by how transportation is executed.

The company's teams across Brazil, Colombia, and throughout the region consistently ensure that every shipment embodies STC's core principles of safety, reliability, and sustainability, whether handling chemicals, food-grade liquids, or specialty products.

In a symbolic gesture accompanying the award, Indorama presented STC with a native Araçá Roxo tree from Brazil's Atlantic Forest, which the company has planted to commemorate the achievement and watch flourish over time.

Human Capital and Corporate Purpose Drive Success

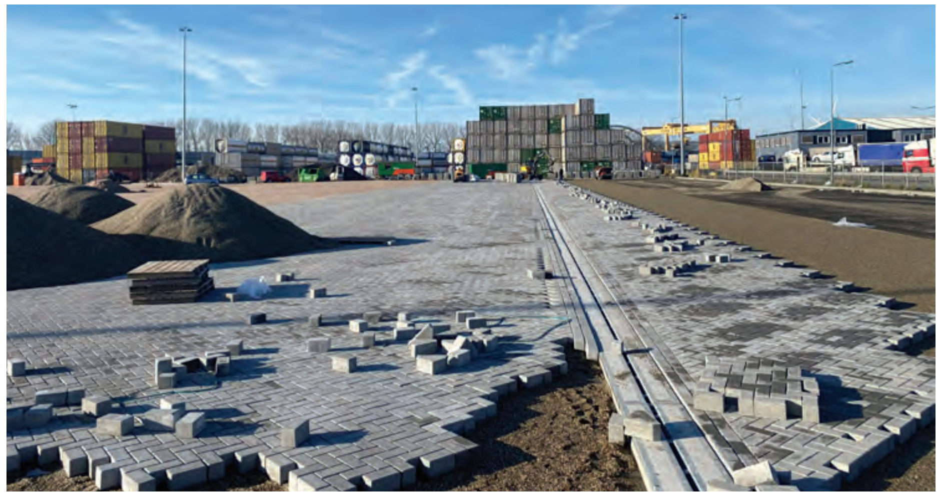
The award reflects the unwavering dedication of STC's South American teams, whose commitment to maintaining the highest operational standards in safety and quality made this recognition possible. The honour also underscores the effectiveness of the company's collaborative, people-centred culture, demonstrating that cross-border teamwork guided by shared values produces measurable results: enhanced service delivery, improved performance metrics, and a more sustainable supply chain infrastructure.

Strategic Foundation for Regional Success

STC's achievements in the Americas stem from carefully planned strategic initiatives. The company has made significant investments in real-time visibility systems and digital tools designed to empower customers, while simultaneously establishing a robust local presence that delivers specialised expertise with global consistency. Throughout these efforts, sustainability principles and operational excellence remain integrated into all business processes.

The organisation expresses gratitude for this recognition, appreciation for customer trust, and pride in its workforce for transforming corporate vision into tangible results. For STC, the award validates that excellence represents not merely an aspiration, but the company's established operational standard. ■

Bertschi completes fifth terminal expansion in Rotterdam with enhanced dangerous goods storage capacity



The Port of Rotterdam, Europe's largest seaport, has continued to strengthen its position as a critical gateway for imports, driving persistently high demand for container storage space, particularly for dangerous goods. In response to this market demand, Bertschi initiated the fifth expansion of its Rotterdam terminal at the beginning of 2024.

Strategic Expansion to Meet Growing Demand

The expansion project was executed on previously unused land located on the northeastern side of the terminal, encompassing additional storage capacity of over 1,000 TEU across an area of 1.7 hectares. The development also included the construction of a filling station designed to enable terminal vehicles and reach stackers to be refuelled with sustainable HVO fuel, supporting environmental sustainability objectives.

The latest expansion, designated as Plot C2, follows the sequential development of the terminal facility, which began with Plot A in 2006 and continued with Plots B, C1, and D in 2015. This systematic expansion approach demonstrates Bertschi's long-term commitment to developing infrastructure capacity in line with market growth.

Construction Challenges and Technical Specifications

The Plot C2 construction project involved substantial earthworks and infrastructure development. The project required the movement of 22,000 cubic metres of earth, processing of 930 cubic metres of cement, and laying of 800,000 stones to prepare the areas for reach stacker operations. The sewers were specifically designed to function as certified retention basins for dangerous goods in emergency situations, incorporating safety considerations into the fundamental infrastructure design.

The construction faced an unexpected challenge related to seagull protection requirements. As these birds are under special protection in the Netherlands, construction work experienced repeated interruptions over several months to comply with environmental protection regulations. The project team noted that while the delays were significant, they remained committed to adhering to all environmental protection requirements.

Enhanced Terminal Capabilities

The C2 terminal extension was successfully completed and handed over to the local workforce in December 2024. Following this expansion, Bertschi now operates a total storage capacity of 7,300 TEU in Rotterdam, with 2,200 TEU specifically reserved for dangerous goods storage, addressing the critical market demand for specialised container handling.

Beyond bonded storage capabilities, the expanded infrastructure offers several critical operational advantages. Containers can be heated using steam, electricity, or hot water as required to safely store temperature-sensitive products, providing flexibility for diverse cargo requirements. The terminal maintains direct rail and sea connections, enabling seamless intermodal shipping operations by ship, rail, and truck.

Strategic Positioning and Market Impact

These versatile transport options position the terminal as a high-performance hub for the chemical industry and international transshipment operations. The multimodal connectivity enhances the facility's attractiveness to customers requiring integrated logistics solutions across different transportation modes.

Bertschi anticipates that this latest expansion, combined with existing infrastructure capabilities, will further strengthen the company's position as an integrated partner for storage and import concepts. The enhanced capacity and capabilities are expected to open new opportunities for growth in the Rotterdam market while supporting the port's continued development as Europe's premier maritime gateway.

The successful completion of Plot C2 represents a significant milestone in Bertschi's strategic development of its Rotterdam operations, demonstrating the company's ability to respond to market demand while navigating complex regulatory and environmental requirements inherent in major infrastructure projects. ■

HOYER Group strengthens its presence in the Kingdom of Saudi Arabia

The HOYER Group, one of the world's leading logistics providers specializing in liquid goods from the chemical, gas, and food industries, has strengthened its Middle East presence with the establishment of a new facility in Dammam, Saudi Arabia. The expansion builds upon the company's existing operations in the region, where it has maintained a presence since 2018 under the name HOYER Middle East, operating a storage and filling facility for chemicals in Al Jubail.

The new Dammam site operates under the name HOYER Arabia and features a local team of experts who handle transport logistics activities directly on-site. This strategic expansion represents a decisive step in the company's ability to serve customer needs more quickly and effectively throughout the Saudi Arabian market.

Selcuk Cingi, regional director Middle East and India of the HOYER Group, emphasised the strategic importance of the Saudi Arabian market for the company's global operations. He highlighted Saudi Arabia's economic momentum and ambitious future plans as offering significant potential, particularly for the chemical industry. The establishment of the specialist team at the new location, combined with HOYER's global expertise, ensures optimal customer support directly within the market.

The expansion enables HOYER to better combine its modular services, ranging from storage and filling operations for both large and small containers to comprehensive transport logistics solutions. This integrated approach positions the company as a comprehensive partner for the regional chemical industry, offering services along the entire supply chain with reliability, safety, security, and local expertise.

Currently, the company's focus centers on overseas business operations, with land transport increasingly being implemented within Saudi Arabia and to neighboring countries. The service portfolio is planned to expand further to include intermodal transport movements, aligning with Saudi Arabia's substantial investments in expanding its rail network infrastructure.

The HOYER Group brings decades of experience in intermodal transport, including expertise in managing challenging individual routes. With its global network of specialists and specialization in road, rail, and overseas transport, the international logistics provider is positioned to serve as a strong partner in liquid goods movement once Saudi Arabia's rail expansion project reaches completion.

Through its Supply Chain Services (SCS) operations in Al Jubail, the HOYER Group covers a comprehensive range of services throughout Saudi Arabia. These services span from formula-compliant mixing, filling, and product storage to complete transport logistics and unloading operations, providing customers with end-to-end solutions for their liquid goods requirements.

Ahmed Al-Mualem, General Country Manager for Saudi Arabia, explained that the new office brings the company closer to its customers while enabling more efficient solution delivery. He noted that demand is constantly increasing, particularly from the chemical industry, and highlighted how the local team addresses this demand through innovative approaches such as swap body tank containers.

These specialized containers, which have gained popularity in European markets, offer larger volumes than standard ISO tank containers, making land-based and intermodal transport movements more economical. This technology transfer from HOYER's European operations demonstrates the company's ability to leverage global best practices in local market applications.

The expansion into Dammam represents more than operational growth for the HOYER Group. It underscores the company's long-term commitment to Saudi Arabia's developing market while sending a clear signal about its priorities of customer proximity, operational efficiency, and sustainability. The strategic positioning in multiple Saudi Arabian locations enables HOYER to serve the growing demand for specialized liquid goods logistics while supporting the country's economic diversification initiatives.

Through this expansion, HOYER reinforces its position as a key logistics partner for companies operating in Saudi Arabia's evolving chemical and industrial sectors, providing the infrastructure and expertise necessary to support continued economic growth and development in the region. ■

Van Moer Logistics: *a story of adversity, determination, success*

Van Moer Logistics is growing and its secret of success is rooted in the entrepreneurial spirit and raw determination of its founders, Jo Van Moer and his wife, Anne Verstaeten. A devasting fire destroyed the company's first premises, and their adjacent home, forcing them and their two young children to live in a caravan with their company on the brink of bankruptcy.

Later, they survived the wholesale call-back of loans by banks in the 2008 global financial crisis by selling their home to keep up the loan payments on the business. Turnover is now €315 million with a staff of 2,200 at 40 locations.

Jo Van Moer, the CEO of Van Moer Logistics, shares the highs and lows with *Tankcontainer Magazine.*

The company's journey

In 1990, the then 20-year-old Jo Van Moer started his own transport company. From two damaged trucks, each with a million kilometres on the clock, he made one solid truck that he drove day and night. His wife Anne Verstraeten contacted local companies to look for return shipments and new loads.

Jo realised that transport margins were thin and therefore opened a warehouse in Melsele in 1993, close to the port of Antwerp. The warehouse was in demand as dockers in the Antwerp port at the time only worked until 3pm so trucks arriving later had to wait until the next day to unload. Seeing the opportunity, Jo allowed carriers to unload in his warehouse 24/7 and handled onward transport to the port terminals himself. A second warehouse was opened in Temse in 1996.

In 1997, **disaster** struck in Melsele. A forklift short-circuited and caused a major fire. Not only did the warehouse go up in flames but the adjoining offices and Jo and Anne's private home were reduced to ashes. Their insurance broker advised them to prepare for **bankruptcy** until Jo came into contact with the manager of a renowned insurance agency, who came up with a solution to settle claims.

While this was happening, Jo and Anne continued the business in the Temse warehouse, living - with their two young children - **in a caravan for a year and a half**. The warehouse quickly ran into its limits so, in 1999, Jo opened his **first warehouse on Antwerp's left bank** (Kallo), anticipating the relocation of major players in the Antwerp port from the right to the left bank, due to increasing congestion.

At this strategic location, he deployed an intermodal 'shuttle train', transporting - without congestion - 200 containers a day between the port terminals on the right bank and the warehouse in Kallo on the left bank, where there was space to handle and store goods.

Up until 2005, Van Moer Logistics concentrated on road transport and storage, but Jo had become convinced that **diversification** was needed to continue growing and strengthening the company's position. He therefore acquired Janssens **Cleaning, becoming active in cleaning bulk trucks and tank containers.** To further expand his services to chemical companies, he looked for a new site in the port of Antwerp where the tank cleaning business could be developed, finding a greenfield site in Zwijndrecht, in the middle of the chemical cluster of the Antwerp port. In 2008, Van Moer Logistics opened its **brand-new warehouse, cleaning facilities and head office** there with an investment of €25 million, at a time when turnover was €60 million.

The completion of the new building took place in August 2008. Barely two months later, Lehman Brothers fell, and a **global financial crisis** followed. Van Moer Logistics' turnover fell by as much as 45% and the company's banks announced that they would revoke the loans granted and demanded a large part of the loan back within 6 months.

During this period, Jo and Anne received an enticing takeover offer, which would have got the company out of trouble and would have left them with a comfortable sum. With the business on a knife-edge, the iron-fisted Anne and Jo, bolstered by an independent adviser, were able to negotiate that the bank payments be spread over three years. The banks accepted, on condition the couple also contributed their own private capital. In 2009, Jo and Anne **sold their private house** to pay off the first part of their debts, giving the company some room to continue its activities.

With dire market conditions, cash flow was tight and internal restructuring was necessary to cut costs.

In 2011, an opportunity presented itself in Grimbergen, where 'De Vlaamse Waterweg' was marketing a vacant barge terminal. Jo was convinced that **multimodal freight transport had huge future potential** and other road hauliers feared that Van Moer Logistics would rival road transport with inland shipping.

Van Moer Logistics initially handled goods at the terminal for existing customers but in 2015 Jo Van Moer convinced new major players of its multimodal vision. Volumes rose at lightning speed and in 2016 Van Moer Logistics started expanding its **own barge fleet** to serve the terminal.

Due to explosive growth of the business, the company needed to employ a structure that could support the company's further development and in 2012 an experienced CEO was recruited along with other external professionals. An executive committee took shape and the group's new board then signed off on an ambitious '2020-200' target: to **double revenue €200 million** in five years through organic growth and acquisitions. An advisory board was also established.

In 2016, Jo's entrepreneurial instincts were bearing fruit - for years, Van Moer Logistics had competed with service providers located on Antwerp's right bank, who did not have to bear the cost of driving through the tunnel to the left bank. However, deep-sea terminals were now starting to establish themselves on the left bank, working to Van Moer Logistics' advantage. The new terminals allowed the company to greatly **expand its left bank position** between from 2016 to 2020. ➔

COVER

VAN MOER Logistics

"We continue to invest nationally, but our ambitions are truly without borders - literally."

With the arrival of new partners, the first steps in **e-commerce and fast-moving consumer goods** were also taken from 2020. These flows led to the geographical footprint of Van Moer Logistics extending into Ghent, Brussels and Grobbendonk.

In June 2021, the investment company **Ackermans & van Haaren** acquired an equity stake in Van Moer Logistics, freeing up resources to further the company's international ambitions.

TCM: What next - geographical expansion, acquisitions?

JVM: We continue to invest nationally, but our ambitions are truly without borders - literally. In **North America,** we see major opportunities in Houston, where production volumes are expected to grow significantly in the coming years. This site will replicate our one-stop-shop concept from Zwijndrecht (Port of Antwerp), offering a full range of tank container services i.e., trucking, storage, cleaning, repair, heating/chilling, drumming and filling. By combining all these activities at one location, we aim to provide the same level of operational control, safety and service quality that our customers value in Europe. Earlier this year, we established a joint venture with WorldEx, a logistics provider in China and, like us, a family-owned company. We're confident this partnership will strengthen our ability to handle the flow of goods from China to Europe through the Port of Antwerp.

In **Saudi Arabia,** we have set up a commercial joint venture, while in **Qatar,** we are exploring opportunities with our local partners Q-Fab and Aertssen to provide on-site logistics services.

TCM: What trends do you see in the tank container sector?

JVM: The tank container sector is evolving rapidly, driven by global shifts in sustainability, technology and supply chain resilience. We see several key trends shaping the future:

- **Supply chain resilience and localisation:** the disruptions of recent years have prompted chemical producers and tank operators to rethink the network design. There's a growing push to shorten supply chains and create regional storage and maintenance hubs closer to production sites and end users. Our Perfect Flow model is a direct response to that trend, offering customers more flexibility, security and cost control.

- **Sustainability and modal shift:** the industry is moving decisively towards lower-emission transport modes. More shippers are opting for rail and barge over long-distance trucking, particularly for chemical shippers looking to meet their carbon dioxide reduction targets. This aligns perfectly with Van Moer's multimodal DNA - combining road, barge and rail within our depots and terminals to offer cleaner logistics solutions.

- **Digitalisation and data integration:** transparency and efficiency are becoming non-negotiable. Customers expect real-time visibility on tank container status, product location, cleaning certificates and maintenance planning. We're investing heavily in digital platforms and AI to connect all operational activities - from cleaning, heating, repair to truck dispatching.

- **Safety and regulatory compliance,** with tightening safety and environmental standards, are becoming decisive differentiators. Certified infrastructure, continuous training and automated quality systems are now essential. We continue to invest in people and technology to maintain our strong safety record.

Biography

With his roots in Beveren and a background in welding, Jo Van Moer founded his transport company in 1990 with just two worn-out trucks. Today, he is the CEO of the eponymous logistics group employing around 2,200 people. Together with his wife, Anne Verstraeten, he continues to grow the family business, pioneering in sustainable logistics and building high-quality partnerships. Jo was named Multimodal Ambassador (2024) and was recently inducted into the Gallery of Prominent Entrepreneurs by the VOKA Chamber of Commerce Antwerp-Waasland.

Van Moer Logistics now operates from over 40 locations in Belgium. The group's assets include approximately 500 trucks, 850,000 square metres of warehouse space and 15 inland vessels. ■

What is the likely profitability of *tank container operators?*

Editor Leslie McCune continues his analysis of the attractiveness and potential profitability of the tank container operator sector using Professor Michael Porter's well-known 'Five Forces' competitiveness model. In the last issue, the threat of substitutes was viewed as being low. A second force - the extent of the bargaining power customers have over tank container operators - is now explored.

The Five Forces model

In the last issue of *Tankcontainer Magazine* we introduced Professor Michael Porter's so-called 'Five Forces' model for analysing the attractiveness and likely profitability of industries and applied it to the tank container operator sector.

Professor Porter is a Harvard-based academic with a worldwide reputation as one of the foremost authorities on the global competitiveness of industries. He is the author of a compendium of books and articles on competitive strategy and competitive advantage and is said to be the most cited author in business and economics. Porter stressed the importance of corporate strategy having continuity, rather than being constantly renewed, and the need for a company to differentiate itself from its rivals for it to earn outstanding success.

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

The model recognises that tank container operators would naturally keep a close watch on their rivals, but it encourages them to look beyond the actions of their competitors and examine what other factors could impact the business environment. It identified five forces that make up the competitive intensity of a market - these can either erode or enhance the profitability of a company operating within the market. The five forces are:

Force 1: Threat of substitute products or services
Force 2: Bargaining power of buyers (i.e. customers)
Force 3: Threat of new entrants
Force 4: Bargaining power of suppliers
Force 5: Rivalry among existing competitors

Force 1: Threat Of Substitutes (WEAK)

In September's issue of *Tankcontainer Magazine*, we analysed the extent to which the assets and services of tank container operators could be substituted. The threat of substitution refers to the likelihood of customers finding different ways of providing what tank container operators currently deliver. A substitution that is cheap and easy to make weakens the position of a tank container operator and threatens its profitability.

We also considered alternative packaging types (i.e. drums, IBCs, flexibags, road tankers, rail tank cars, parcel tankers, pipelines and local production) and assessed the ease with which operators could be substituted by other supply chain models (owned assets, 4PLs, etc.).

We concluded that the **THREAT OF SUBSTITUTES** to the products and services offered by tank container operators is **LOW** and therefore the power of these potential alternatives was weak. This is a **positive signal** on the **attractiveness** and **potential profitability** of the tank container sector.

Force 2: Bargaining power of buyers

We now consider the second of Porter's five forces: the bargaining power of buyers i.e. what strength have chemical and foodstuff producers got over tank container operators when they buy their services?

This customer cohort includes BASF, Dow, Sinopec, LG Chem, SABIC/Sadara, Arkema, Evonik, Infineum, Air Liquide, Ecolab, Sipchem, S-Chem and Barry Callebaut. If the negotiating power of these types of customers is high, tank container operator margins come under pressure. If the buyer's negotiating power is lower, there is more opportunity for tank container operators to make fair and sustainable returns, part of which will be available to reinvest back into the business to meet the future needs of customers.

The key power **drivers** in the operator-customer relationship are their relative sizes, their dependence on each other (for equipment, technical advice and digital support), the complexity of the logistics requirement, and the relationships that are in place. In terms of buyer power, how easy is it, therefore, for the customers of tank container operators to dictate commercial and performance terms and conditions? Ultimately, much depends on the extent to which one party has to rely on the other.

In the **current market**, many customer-operator relationships are being strained by the poor corporate performance of the chemical companies, especially those with exposure to the chronically underperforming European petrochemical market where over 20 plants have closed in the past two years - with more to follow - as investment shifts to regions with much cheaper energy, lower feedstock costs, no carbon penalties and policies that support long-term growth. INEOS' plant in Cologne, for example, - one of the most advanced integrated petrochemical facilities in Europe - pays $280 million a year more than an equivalent US plant for its gas, electricity and carbon costs. In just three years, the total net profit of the Top 100 global chemical companies collapsed by 80% to an unsustainable $23 billion in 2024. ➔

Professor Michael Porter.
Photo: Harvard Business School

OPERATORS

Today, the **bargaining power of customers** over tank container operators may be **WEAK** for the following reasons:

- **Producer fragmentation:** There are many chemical producers but, at a global level, none are so large (and can therefore offer regular, multi-product, major volumes on a multi-year basis) that they can exert disproportionate negotiating pressure over the tank container operators on which they rely for the global distribution of their products.

  The customers of tank container operators tend, therefore, to be diversified and fragmented, in terms of both size and needs. Chemical and petrochemical producers, air gas producers, mineral oil, foodstuffs and bitumen manufacturers all have their unique equipment requirements with some tank containers costing up to $1 million.

  Standard, plain vanilla T11 tank containers may cover the majority of demand of the lower value, non-hazardous segment of the market but many still come with an element of specialisation.

  The degree of equipment differentiation - and the need for specific equipment to be available at the required location at the right time and with approved last cargoes - moves negotiating power away from producers.

  In general, the larger the producer, the more diverse are its product and geographical network. **BASF** is one of the largest customers of tank container operators and is widely recognised as being one of the most open-minded and innovative chemical producers in terms of supply chain solutions. It is also one of the most demanding chemical producers and often requires unique and very specific requirements for the tank containers they use e.g specialised load/discharge fittings and valves.

  While there are **no dominant chemical producers** at the global level, **regional behemoths** do exist and, understandably, will try to leverage their purchasing power over tank container operators. Their power can arise from the market dominance of a single buyer (e.g. Aramco/SABIC/Sadara in Saudi Arabia) or from preferential government regulation such as import tariffs (e.g. Reliance in India, in the past).

  However, neither of these two situations resulted in what economists describe as a monopsonistic market, in which there is a single dominant buyer with substantial (or even controlling) influence over the price it pays for the services offered by tank container operators.

- **Reduced risk tolerance:** The tolerance of risk, in its various guises, is much-reduced in today's market. The appetite for societal, shareholder, investor and corporate risk-taking has diminished so strategic commitments with quality third party supply chain specialists and partners are encouraged as a way of minimising reputational risk and maximising safety performance. Arguably, higher interest rates mean that less risk is accepted by investors for the returns on offer from the tank container sector.

  This, combined with the **increasing technical and regulatory complexity** of hazardous product supply chains, increases the dependence of chemical producers on their tank container operators and supply chain specialists.

- **Limited substitutes:** tank container operators provide an essential logistics service for producers, especially for those manufacturing hazardous bulk liquid products (there are more packaging options available for non-hazardous goods, such as flexibags, etc.). There are few intermodal alternatives for the movement of small lot size hazardous bulk liquids.

- **Increased reliance on third-parties:** many producers have, for good reasons, surrendered their in-house logistics expertise and rely on outsourced third parties for their distribution needs. Tighter regulations, for example, require logistics expertise on safety and product handling which customers may no longer have (or want). The reliance of producers on third parties reduces their purchasing power.

  Operators now often have far greater skills than their customers in the increasingly essential and sophisticated **digital capabilities** demanded to successfully compete and deliver in the global logistics sector.

- **Complexity:** the cost and complexity of **switching** between operators is high. Complexity may come in the form of equipment specifications, network intricacy or the extent of the integration of digital systems between operator and customer.

- **Advisory support:** Several of the leading operators offer valuable advisory support on logistics challenges. This service clearly differentiates some operators from others and is one on which many customers depend.

- **Increasingly explicit requirements:** The general trend in the market for producers to look for closer matches to their increasingly **explicit** requirements weakens the purchasing power of producers since not all operators can match these requirements. Producers will, however, usually have relationships with several supply chain providers to ensure security of supply.

  Tank containers are freely available and the global fleet is relatively standardised, with the clear majority being T11s. The ability of T11s to carry most products increases the bargaining power of customers. However, customer preferences for equipment are becoming more specific and there are an increasing number of bespoke solutions. HOYER, for example, have developed new generation, 'smart', heated titanium tank containers - which they first introduced more than 30 years ago - for the transport of molten monochloroacetic acid (MCA), a highly corrosive and dangerous chemical. Conventional rubberised or coated stainless steel tank containers do not withstand the product requirements and transport conditions of MCA so titanium was chosen for its corrosion resistance and, importantly, durability.

- **Flexibility:** Customers are more **reliant** on tank container operators as they adapt, in the short term, to the distorting uncertainties of global trade caused by the weaponisation of US trade policy. Producers are, in general, less able to respond to supply chain uncertainty and volatility than tank container operators, who create the increased flexibility needed in today's supply chains.

- **Rationalisation:** The painful rationalisation in many value chains of the global chemical industry is increasing the reliance of producers on tank container operators to maintain the continuity of supply to existing, and new, customers.

- **Urgency:** Although many tank container flows are appealingly predictable, the bargaining power of customers is weak when tank containers are urgently required, especially if they are specialised tank containers or the producer has a narrow list of last cargo tolerances. The increase in spot business, rather than contracted, suggests a greater need by producers for the near-term availability of equipment.

- **Last cargo restrictions:** Increasingly tight last cargo restrictions by petrochemical and chemical majors has had the effect of limiting the availability of suitable tank containers, weakening their negotiating power over those operators that can provide approved tank containers in the desired location at the right time. Although desirable for all, there is no harmonisation on last cargo approvals in the industry, and unlikely to be so for some time.

Conversely, the **bargaining power of customers** over tank container operators may be **STRONG** because:

- **Large volumes:** The very slow, very stable, globally-dispersed chemical trade flows of the large volume chemical and food grade producers are attractive to operators. In addition, the credit risk of these customer types is low while customer retention tends to be high and features multi-year contracts.

- **Operator fragmentation:** The tank container operator market, unlike the leasing market, is highly fragmented - no operator, by themselves, is capable of influencing rates, except in rare occasions for highly-specialised routes and/or equipment.

- **Competitive intensity:** The competitive intensity and internal rivalry within the operator segment is high with many more tank container operators now competing for the volumes available. The number of operators has increased by nearly a quarter in the past decade, during which time the global tank container fleet size has doubled. Several of these newer entrants have global ambitions and capabilities, and these will challenge the status quo. **E-WAY**, for example, operates its tank containers under its ITM (Isotank Management) brand, which is a 100%-owned, Singapore-based subsidiary serving chemical producers, distributors, traders and food distributors. Its goal is to be a 'top five' operator within the next five years.

  ITT's recent acquisition of Bulk Tainer Logistics eliminates a potential competitor in the industry but will intensify the competition in the deep sea market with ITT becoming a genuine deep sea operator, in a way that neither ITT nor Bulk Tainer Logistics were before the acquisition. The combination of the two will create a fleet of over 31,000 tank containers, making ITT/Bulk Tainer Logistics the fourth largest tank container operator, behind Stolt Tank Containers, HOYER and NewPort. With E-WAY aiming to be a top 5 operator, Den Hartogh and Bulkhaul may be squeezed down the rankings.

  Elsewhere, it is conceivable that **Milkyway Logistics**, a leading Shanghai-listed chemical logistics service in China with revenues heading towards $2 billion, would create more competition in the tank container market if it invests in strengthening its global footprint.

- **Developing markets:** With short-term growth prospects in Europe being so poor, the search for growth has moved on to under-developed markets with higher growth potential, such as India, where the competitive environment in the tank container sector has increased. The bargaining power of customers - now offered more choice - is therefore strengthening.

- **Utilisation:** Utilisation is currently low among operators, increasing the negotiating power of customers over tank container operators. This is especially true for standard T11s but many customers have become more specific with their requirements over the years. As a result, headline figures for fleet utilisation - now approximately 65% for operators - are deceptive since they suggest relatively unconstrained availability.

  In reality, a number of factors, such as tank container sizes, global fleet balances and last cargo preferences can restrict the availability of equipment. Dow, for instance, ships large volumes of MDI/TDI isocyanates and acrylates in tank containers but only a relatively limited number of deep sea operators have the capability and commercial desire to move these sensitive, high-maintenance products. So-called 'smart' tank containers, featuring remote sensors, are not always needed but are particularly valuable for these cargo types.

  Unutilised assets not only represent lost revenue opportunities but also, of course, attract storage costs.

- **Less single sourcing:** Demand from the chemical sector is enduring a plateau low - global chemical production was at 68% of capacity in 2024 compared with an average of 78% for the period from 1997-2023. Volumes are therefore lower and cost reductions throughout chemical organisations - not least in their supply chain - are a strategic priority.

  Some large chemical customers - who had their anxieties about the risk of single-source logistics commitments crystallised during the Covid-19 pandemic - are looking to reduce their dependence on single logistics partners by working with multiple providers, thereby increasing their negotiating power over operators. Multiple supply chain partners, rather than a dependence on one strategic partner, are seen by many producers as today's risk-minimising model and are therefore a corporate priority.

- Leasing options are obviously a large and dynamic component of the overall tank container market. This creates viable alternatives for those producers prepared to lease (or own) tank containers, which can be deployed using in-house, or third-party, logistics management assets. This option reduces the negotiating power of operators.

Conclusion

The apparent easy availability of tank containers can be deceptive as supply can be locally tight due to high freight rates (which discourage the re-positioning of empties), the limited availability of specific equipment types and perhaps overly-cautious last cargo acceptability.

However, the above analysis indicates that **THE BARGAINING POWER of BUYERS** (i.e. companies using tank container operators) is **MEDIUM**.

Coming up …..

In the next issues of *Tankcontainer Magazine*, we look at the remaining three forces that shape the competitive pressure in the tank container operator sector. These are:

Force 3: Threat of New Entrants - This force addresses how the position of a tank container operator can be affected by a new entrant's ability to enter the market. This depends on a variety of issues such as the strategic synergies with the new entrant's other businesses, the projected financial returns, the cost of market entry, and the strategy for developing or acquiring the essential market expertise and management skills needed to run a successful tank container operator business.

Force 4: Supplier Power - is determined by how easy it is for the tank container manufacturers - and the lessors providing tank containers to operators - to increase their prices and per diems. This depends on how many potential manufacturers and lessors there are of the specific equipment needed, and the costs of switching between manufacturers and lessors. The greater the choice, the easier it is to switch to lower cost, alternative suppliers.

Force 5: Competitive Rivalry - considers the number and strength of rival tank container operators, and assesses how the quality and availability of their products and services compare. Where rivalry is intense, profitability is threatened.

Leslie McCune is an independent tank container market expert and has worked with several tank container lessors and operators to analyse their individual competitive positions using Porter's Five Forces model. ■

REGIONAL

EFC
a tank container partner in India

The EFC Group has the fleet, infrastructure and commitment to quality needed to help tank container shippers succeed in India and beyond. It established an Indian joint venture with Bulk Tainer Logistics UK and

With the world's largest population of nearly 1.5 billion people, India is tipped by its own government to be the world's third largest economy by 2030 with a projected GDP of $7.3 trillion. But while India is a country on the up, its diverse human and physical geography can be intimidating to many foreign companies. However, as Kalyan Chowdhury, group director of the country's EFC Group, states, "India is not a market to be avoided or feared. In the right and reliable hands, India offers tremendous efficiency, competitiveness and long-term stability." Indeed, he continues, "many global shippers and international logistics companies are already benefitting from our deep understanding of the Indian market and our operational strength across the logistics value chain".

A diversified shipping and logistics group offering comprehensive end-to-end services across India, the EFC Group has more than 750 trailers and a 2,000-strong associated fleet, with a substantial number of units dedicated to tank container transports on a Pan-India basis. It's numerous operations also encompass a nationwide network of depots for the storage of both IMO and non-IMO units; a mega container freight station and warehousing facilities in Nhava Sheva, a major port hub near Mumbai; a mega logistics park in West Bengal; and even a construction chemical manufacturing plant operated in conjunction with Switzerland's Sika.

A key entity within all this is Tranceglobal Logistics, the EFC Group's tank container division. Offering a full gamut of national and international tank container logistics and leasing services, Tranceglobal currently maintains a fleet of around 1,000 tank containers, consisting primarily of 25,000 and 26,000 litre T11 and baffled designs. This, however, will increase next year with the addition of a further 200–250 units, subject to market conditions and demand.

Unique in India

Supporting this, the EFC Group's infrastructure also includes a cutting-edge tank container cleaning station, maintenance and repair facility and depot in Nhava Sheva. Offering complete depot solutions and able to handle a wide range of tank containers, including T11, T14, T20, T50 and T75 types, the company's Nhava Sheva operations are also fully equipped to clean units used in the transport of hazardous, non-hazardous and highly hazardous ➔

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substances alike. "This facility is open to third-party operators as well, and many global tank operators and leasing companies rely on our services," Chowdhury says. "As far as we are aware, we are the only Indian tank operator with this integrated capability under one roof – trucks, depots, cleaning, repair and maintenance."

The scope and reach of the EFC Group's tank container operations continues to widen, with Chowdhury revealing that the company has "clear expansion plans" in terms of both fleet capacity and service offerings. "Two years ago, based on the strong value we delivered, we formed a joint venture with Bulk Tainer Logistics UK, establishing Bulkiso Tainer Logistics India. This expanded our access to their global fleet and strengthened our combined presence," he says. "A major development this year has been the merger of Bulkiso Tainer Logistics' joint venture with the Intermodal Tank Transport (ITT) Group, significantly expanding our tank inventory, including food-grade units, and enabling us to service a much larger customer base."

Global Operator

Tranceglobal has also now further broadened its international footprint with the opening of an office in Dubai following "the strong success" of its office in Singapore. "Tranceglobal has evolved into a global operator with a strong international network, bridging the gap between our customers and our partners. We are able to offer solutions in regions where traditional tank operators have limited interest, such as West Africa, North Africa and Central America," he says. "Our intent is not only to expand volume, but to expand into challenging geographies where value lies in customised solutions, flexibility and reliability."

Serving a wide range of companies across numerous industries, the EFC Group's extensive roster of customers includes many of the world's largest chemical shippers. "Our ISO tank division adds significant value to these existing relationships," Chowdhury notes. "In addition, we support numerous tank operators who rely on our deep India expertise, depot infrastructure, cleaning facility and trucking capabilities. This creates a genuine win-win partnership."

"Tranceglobal Logistics maintains a strong India-based customer base, but also works extensively with partners globally, enabling seamless flows from India to multiple continents. In the past year, our strategic direction has clearly shifted towards a more global operating model, supported by offices in Singapore and Dubai," he continues. "We also support inter-Asia and Europe-Mediterranean movements, strengthening our partners' networks. Our agility and flexibility distinguish us in a market where not all cargo moves towards 'preferred' trade lanes."

> *"Tranceglobal Logistics maintains a strong India-based customer base, but also works extensively with partners globally, enabling seamless flows from India to multiple continents. In the past year, our strategic direction has clearly shifted towards a more global operating model, supported by offices in Singapore and Dubai"*
>
> Kalyan Chowdhury, group director, The EFC Group

Market Challenges

While Tranceglobal and the EFC Group as a whole continue to grow, the broader economic arena is certainly not without its challenges. "The global tank industry is experiencing significant pressure due to the economic downturn, post-COVID distortions and an oversupply of tanks caused by high-priced leasing commitments made during the pandemic," Chowdhury explains. "During COVID, new-build tanks touched $23,000 and leasing rates went as high as $6.50-6.80 per day. Today, margins have dropped so low that even $3.00 per day cannot cover market costs. Many operators are now off-hiring tanks acquired under those high-price contracts, resulting in surplus availability and falling new-build prices."

As a consequence, many freight forwarders are now buying or leasing their own tanks without fully appreciating all the associated overheads and operating, maintenance and repair costs. This has led to what Chowdhury describes as "a proliferation of small tank operators entering the market". At the same time, leasing companies are "increasingly offering tanks directly to shippers, disrupting the economics for established tank operators and reducing their margins further".

"Our response has been strategic and disciplined," he says. "We invested in 250 additional units this year, including special units for specialised cargo. We expanded our service footprint into new regions beyond traditional main ports. We strengthened global operations to serve niche lanes where others are reluctant to operate. These decisions have yielded strong results and helped us gain global traction despite challenging market conditions."

Quality Counts

With rising costs, geopolitical instability and global economic pressures affecting both operators and shippers alike, many operators, he says, "are cutting costs on repairs, gasket replacements and even insurance, which presents significant risk to the entire industry". The EFC Group, however, has chosen not to follow suit and in so doing gained a further commercial advantage. "All our units are fully insured, well-maintained and handled through professional SOP-driven processes supported by our in-house depot and cleaning facility. Our integrated model gives us cost efficiency and greater control over safety and quality."

"Another positive trend is the drop in leasing prices and new-build prices, which creates opportunities for well-structured operators like us to invest sensibly," he continues. "Creativity and operational innovation are now essential. Fortunately, this is where the EFC Group excels, offering diverse logistics solutions, cost-efficient models and end-to-end service integration."

Regardless of the economy, matters of health, safety, the environment and quality remain central to the company's philosophy. "The EFC Group is certified under ISO 9001, ISO 14001 and ISO 45001, forming the foundation of SQAS-aligned processes. We see increasing demand for G-SQAS from large global shippers, which we welcome. Our teams undergo regular training, including annual IMO training by industry specialists. Operational SOPs, built on our ISO framework, are strictly enforced to minimise errors and ensure consistency," Chowdhury states. "We also place high value on our people. A motivated, respected workforce directly translates into better service for our customers. Our HR team can elaborate on gender ratio, leadership diversity and employee-centric initiatives, which large shippers increasingly seek visibility on."

Digital Tools

Digitalisation is another area of great importance to both the EFC Group and its customers. "We continue to invest heavily in software and digital tools, though finding a single system that covers all operational needs remains a challenge," Chowdhury notes, listing the company's top priorities as: unit control and real-time monitoring; cost control; efficient documentation; billing and operational reports; and SOP-aligned digital workflows.

"With the rapid evolution of AI, we expect further optimisation of processes," he adds. "AI will allow companies like ours to scale without proportionally increasing manpower, bringing significant cost efficiency. Tracking and monitoring are essential in today's market, where every day of detention counts. Our in-house digital platforms give us strong visibility across fleets and cost centres."

In an ever-more competitive market, the EFC Group prides itself on its ability to offer "the most integrated tank logistics model in India", combining its own fleet of tank containers with an extensive array of facilities and capabilities. "But beyond infrastructure, our true differentiator is our mindset. For over 40 years, we have built this organisation on honesty, respect, reliability and long-term relationships. Our eagerness to serve, our openness and our integrity remain unchanged from day one," Chowdhury states. "These are not slogans; they are lived values. And when our customers and partners share the same mindset, exceptional results follow." ■

TWS aims for leadership in lined tanks and *targets India operators?*

The specialist tank container lessor is leveraging its historical strength in lined tank containers to position itself as the leading global provider of special tank containers, with India in its sights.

TWS Tankcontainer-Leasing is not merely a lessor; it delivers the assets that underpin safer, more sustainable and more efficient global logistics. That is the view of company spokesperson Katja Barthel. She considers specialist expertise in lined tank containers - and a strong commitment to innovation, quality management and customer service - as crucial for allowing the company to offer solutions designed to safeguard both products and the environment.

She adds that TWS Tankcontainer-Leasing’s credentials include ISO 9001 certification, a dedicated Code of Conduct for service partners and recognition from EcoVadis, all of which reflect its commitment to responsible and sustainable growth. Guided by these principles, the company is extending its approach to India and other rapidly developing markets worldwide.

Company and vision

Based in Hamburg, Germany, TWS Tankcontainer-Leasing’s latest expansion has seen it to expand its operations into the Indian market. Barthel says: “India is one of the fastest-growing markets for chemicals, pharmaceuticals and specialty products requiring safe and efficient transport solutions. We see tremendous potential for tank container leasing in India, especially for lined tanks, as local industries expand their international footprint. Establishing a presence in India allows us to support our customers directly on the ground and respond to their needs with greater speed and flexibility.”

TWS Tankcontainer-Leasing’s leasing model is based on “economically sustainable orientation”. This means creating value for customers while maintaining long-term operational efficiency and environmental responsibility. Instead of pursuing short-term gains, we focus on building durable, reliable assets and offering flexible leasing options that help customers optimise costs, reduce waste and operate sustainably.

Service providers

As part of how social and ethical considerations are integrated into TWS Tankcontainer-Leasing’s investment decisions, Barthel explains how the company prioritises investments that respect people, the environment and long-term partnerships. Since 2025, suppliers must comply with international ethical standards and align with its Code of Conduct for Service Providers. Partners must ensure safe working conditions, reduce emissions, and use resources responsibly. Ethics and responsibility define success. ➔

> ***India is one of the fastest-growing markets for chemicals, pharmaceuticals and specialty products requiring safe and efficient transport solutions.***
>
> Katja Barthel, TWS Tankcontainer-Leasing

> *We prioritise investments that respect people, the environment and long-term partnerships.*
>
> Katja Barthel, TWS Tankcontainer-Leasing

She says: "We prioritise investments that respect people, the environment and long-term partnerships. This includes selecting suppliers who comply with international ethical standards and, since 2025, aligning them with our Code of Conduct for Service Providers, which ensures responsible practices across the supply chain. In addition, we only work with partners who can guarantee safe working conditions and support our ambition to reduce emissions and resource consumption. Ethical conduct and social responsibility are not separate from business; they are part of how we define success."

Years of experience

TWS Tankcontainer-Leasing can look back on over 35 years of experience in the rental of tank containers for liquid products in the chemical and food industries. The company claims to offer a solution for every technical challenge with tank containers of the latest technology and design. Whether proven standards, product-specific equipment or sophisticated individual solutions, they all have one thing in common: they make customers' logistics a strategic success factor.

Managing directors Gerd Peters (CEO) and Andreas Herbertz (CFO) look to position the company as the leading provider of special tank containers in the global market. The company provides rental tank containers, swap bodies, reefers and more for customers. While most of its locations are in Germany, it has a presence in Great Britain, France, Spain, Italy, Austria, Poland, Denmark, Sweden, Latvia and Finland as well as Africa, Asia, North and South America.

Product and services

When we asked Barthel what are the key advantages of renting lined tank containers from TWS Tankcontainer-Leasing compared to standard tank containers, she says: "Lined tank containers provide enhanced protection for sensitive or corrosive cargo. They reduce the risk of contamination, extend product shelf life during transport, and minimise cleaning costs. For customers, this means safer logistics, reduced downtime and higher efficiency compared to using unlined tanks.

"We mainly serve the chemical, pharmaceutical and specialty materials industries. These sectors often handle corrosive, high-purity, or high-value products that require additional protection and reliability during global transportation.

"Our tanks are equipped with advanced lining materials carefully selected for each type of cargo. This ensures chemical resistance, product purity, and long service life. In addition, our strict inspection and maintenance programs guarantee that each tank is delivered in excellent technical condition, providing customers with peace of mind."

Technology and innovation

TWS Tankcontainer-Leasing ensures the technical reliability and safety of its lined tank containers with a rigorous quality management system, including frequent inspections, preventative maintenance and compliance with international standards such as IMDG, ADR, and CSC. The company's recent ISO 9001 certification is an important milestone in this respect, as it demonstrates its systematic approach to quality management and continuous improvement.

A range of high-performance lining materials, including rubber, PTFE and specialised coatings is used by TWS Tankcontainer-Leasing. The choice depends on the specific cargo. Corrosive acids, solvents or high-purity products each demand different properties. Together with customers, the company evaluates chemical compatibility and operational requirements to select the optimal solution. ➔

All containers undergo statutory testing every 2.5 and 5 years, in line with international regulations. In addition, TWS Tankcontainer-Leasing carries out more frequent interim inspections and refurbishments as needed. This proactive approach ensures that tanks remain not only compliant but also in peak operating condition throughout their lifecycle, notes Barthel.

Containers are designed and maintained with durability and resource efficiency in mind. By extending the lifespan of containers, using sustainable lining materials, and ensuring proper cleaning and refurbishment, the company reduces environmental impact.

"Our operations are fully aligned with international environmental regulations, and we continuously look for ways to minimise emissions and waste," says Barthel.

"We have invested in modernising our fleet with more durable tank designs and collaborating with service depots that apply environmentally friendly cleaning and repair practices. In addition, we are expanding digital fleet management to help customers optimise container use and minimise transport emissions.

"This year, TWS Tankcontainer-Leasing was also awarded a Bronze Medal from EcoVadis in our very first sustainability assessment. EcoVadis is a globally recognised platform that evaluates companies across four areas: Environment, Labour & Human Rights, Ethics and Sustainable Procurement. Achieving this recognition at the first attempt confirms that we are on the right track and motivates us to further strengthen our sustainability performance."

TWS Tankcontainer-Leasing provides full technical support, guidance on cargo compatibility and 24/7 customer service. In addition, customers benefit from a global network of depots and service partners who ensure quick turnaround times for cleaning, inspection and repairs. The goal is to make leasing with TWS as reliable and hassle-free as possible.

Indian expansion

Customers in India will have direct access to TWS Tankcontainer-Leasing's full portfolio of lined tank containers, flexible leasing options and local service support. This includes assistance with technical advice, regulatory compliance and efficient logistics co-ordination.

The company plans to differentiate itself from local and global competitors in the Indian market by offering a unique range of products and services.

Barthel says: "Our focus on lined tanks gives us a strong niche, as we offer specialised solutions for sensitive and corrosive cargo that many competitors cannot match. Combined with our global expertise, strict quality standards and local presence, we provide customers in India with both reliability and tailored support.

"We are working with trusted local service providers and depots to ensure that customers benefit from high-quality maintenance, cleaning and repair services. To strengthen our market presence, we have also selected Sun Logistic as our strategic partner and agent in India. Together, we presented our co-operation at ChemExpo 2025 in Mumbai, where we shared a joint booth to demonstrate our commitment to the Indian market and showcase the advantages of our collaboration."

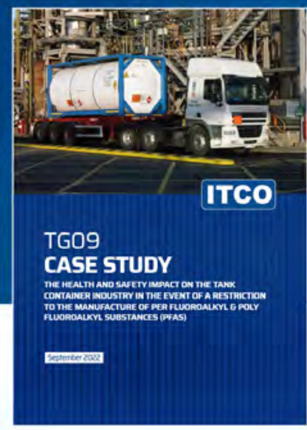
Leadership and growth

How do Gerd Peters and Andreas Herbertz envision the future of lined tank container leasing globally?

According to Barthel, they see growing demand for lined tanks worldwide as supply chains become more specialised and sustainability becomes a top priority. Their vision is to position TWS Tankcontainer-Leasing as the global leader in lined tank leasing by offering innovative, sustainable and customer-oriented solutions.

The TWS Tankcontainer-Leasing fleet currently consists of around 8,000 tank containers, with a significant share being lined units. Barthel expects steady growth in the next five years, with a strong focus on expanding in other high-growth markets, while continuously modernising and diversifying the fleet.

How does the management measure success in both financial and ethical terms? Financially, success is measured by sustainable growth, fleet utilisation and customer satisfaction. Ethically, it is defined by compliance with international standards, environmental responsibility and the long-term trust of our partners and customers. They believe both dimensions are equally important. ■



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Activate when you need it. Pause when you don't.

IMT introduces a revolutionary subscription model that gives you full control over your telematics usage—and your costs.

With our OnDemand model, you activate when data matters, and pause when it doesn't.

No hidden fees, no unnecessary billing—just pure operational freedom.

Built for modern logistics, this model adapts to your planning, your routes, and your customers.

Three smart ways to use our **OnDemand Subscription**

1. New Builds

- Equip all your new build tank containers with IMT telematics straight from production.
- No need to activate immediately. Whether it's one month or two years later, you're in control.
- The hardware is already in place and ready for use when you or your customer needs it.
- Hardware lifetime: 10 years.

2. Deep Sea Shipping

- When your tank container is at sea, data transmission is redundant.
- Use your TMS and our API to automatically pause the subscription during ocean transport.
- Once back on land, the subscription is resumed and the data is synced.

3. Customer-Driven Activation

- Some customers demand telematics data, others don't.
- With OnDemand, you only pay a subscription fee when your customer needs the telematics data and is willing to pay you for it.
- Simple, fair, and cost-effective.

This **OnDemand subscription** model is available exclusively for newly purchased IMT gateways.
For more information, reach out to your IMT sales representative or contact us at *info@intermodaltelematics.com.*

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