

# Tradelanes

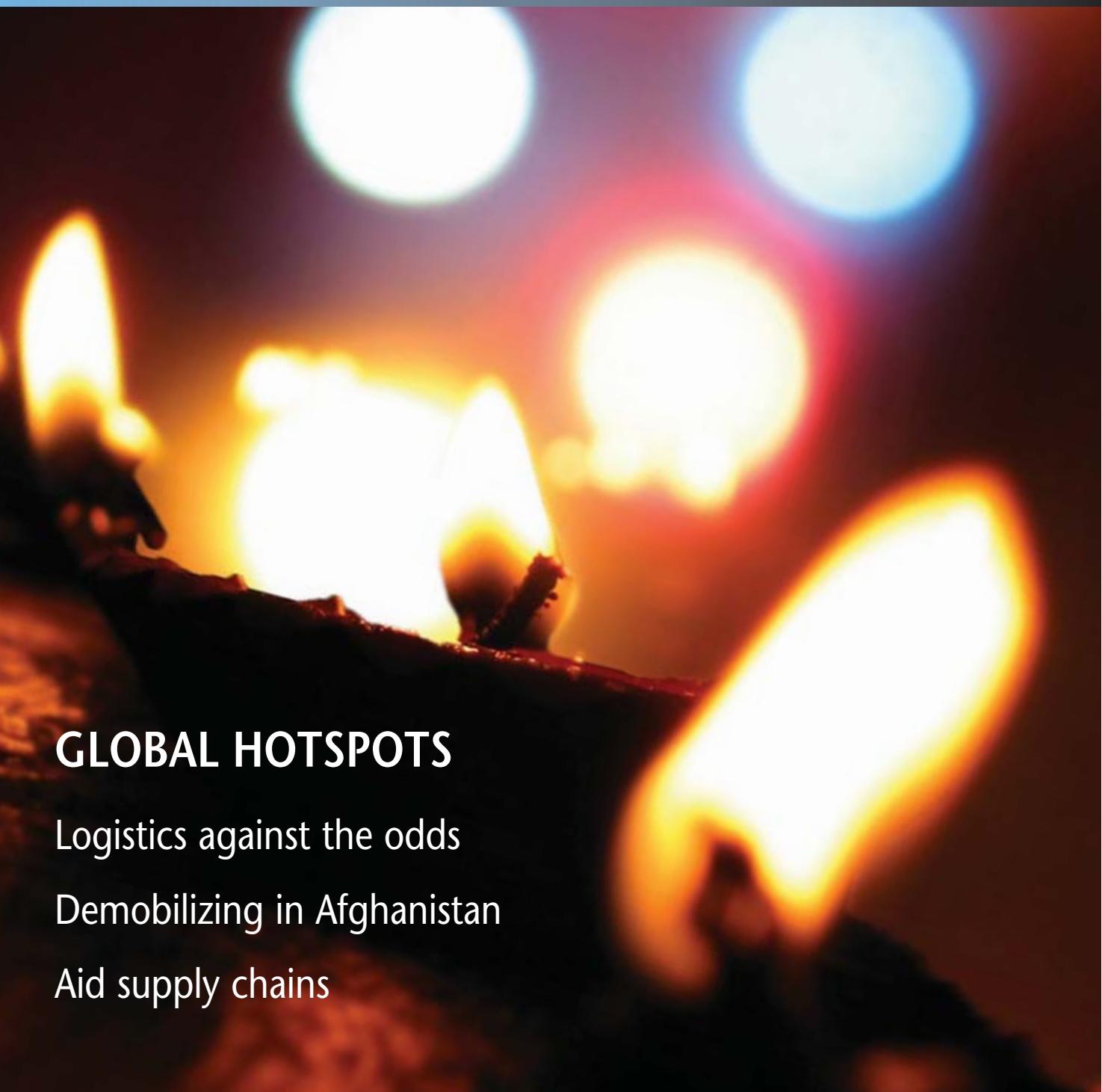
THE MAGAZINE OF AGILITY ISSUE 21. VOL.2, 2013

## GLOBAL HOTSPOTS

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Demobilizing in Afghanistan

Aid supply chains



# Tradelanes

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This issue of *Tradelanes* is about the challenges of operating in global hotspots. These places are characterized by volatility, risk and uncertainty, where Murphy's Law has a tendency to prevail ("Anything that can go wrong, will go wrong").

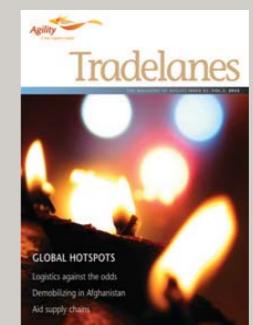
To operate in these areas requires a particular mindset and adaptability. While many logistics companies claim to offer services in over 100 countries, few are genuinely able or willing to take on these kinds of challenges. From the earliest days of Agility's operations in the Iraq war zone, the process of anticipating, planning for and dealing with risk has become second nature.

Agility's work in Papua New Guinea is a prime example of overcoming terrain, distance and volatility. Agility created a 800km supply line through one of the most remote parts of the world to open up a new source of liquefied natural gas and provide valuable income for this Pacific nation.

Similar logistics challenges arise in getting relief supplies to war-torn areas or disaster zones, a key role for Agility Defense & Government Services, which is also actively involved in the withdrawal of UK forces from Afghanistan. UK logistics officers are calling it "the most complex logistics challenge since the D-Day landings of WWII."

Around the world, underdeveloped infrastructure or civil unrest continue to mean special challenges. We look at two examples, Egypt and South Sudan.

We also review the progress of Agility's Corporate Social Responsibility (CSR) program, where engagement has deepened the company's roots and strengthened communities where Agility operates.



Hotspots around the world present individual and ever-changing challenges.

# Global Hotspots

WHERE RISK IS HIGH AND DISRUPTION THE NORM



A particular set of skills and a different mindset are essential

The growth of opportunity in emerging markets brings with it challenges and risks, not least in the supply chain.

For nearly 20 years, logistics providers have been maneuvering to capitalize on the rapid growth in emerging markets economies.

"Is it even possible to speak (any more) about 'emerging' markets in the logistics sector?" asked a recent report by Price Waterhouse Coopers' Supply Chain Management Institute. "Many large logistics service providers report that they already operate in more than 100 countries."

The emerging markets mania that swept the industry obscures the fact that not all developing countries have "emerged." And despite the presence of global logistics providers in countries such as China, Brazil and the United Arab Emirates, few logistics providers – even today – are able to take on the challenges in places where risk is high and disruption is the norm.



## X-Treme supply chains

Global hotspots – much of Africa, as well as parts of the Middle East, Asia and Latin America – are characterized by volatility, risk and uncertainty. Typically, they have untested, unproven or unreliable supply chain networks.

These are places where "volatility emerges as a systemic condition," says Lisa Harrington, a University of Maryland professor and co-author of *X-SCM: The New Science of X-treme Supply Chain Management*.

The challenges and threats that arise in these places "are unlike any you would face in many of the promising emerging markets in Asia, Latin America and the Middle East," says Essa Al Saleh, CEO of Agility Global Integrated ►

## Global hotspots

logistics (GIL), "You need an entirely different set of skills and a different mindset to get the job done."

So, what makes a hotspot "hot"?

**Location**

Remote, austere and under-served locations, such as Afghanistan, Sudan, Kazakhstan, even parts of Australia constitute "location" hotspots.

"Most of these places are quite distant from regional and global transportation hubs and among the weakest or most poorly served spokes in any ocean and air carrier systems," says Al Saleh.

Geographic chokepoints where congestion causes bottlenecks and delays also can be hotspots – the Suez, the Malacca Strait, the Bosphorus, the Arabian Gulf and overland routes from Pakistan to Afghanistan.

Transportation and logistics companies "have to be much more flexible in their transportation routing in order to avoid 'hot spots' that pose problems for security in transit," continues Al Saleh.

"And supply chain managers will need to take into account higher transport costs, longer travel times and potential problems meeting schedules when alternative transport routes are used."

**People issues**

Everything from persistent social unrest (Egypt, Libya) to crime, piracy and theft (Somalia) to an inadequate supply of educated, skilled labor (West Africa), make for hotspots.

"Even if you've established strong relationships and solid contracts with all your suppliers and service providers, external events can jeopardize your supply chain," says Al Saleh.

"Political upheaval, economic protests, national labor actions, and complete regime changes (in Arab Spring countries) created turbulent conditions throughout the summer of 2011."

People issues also can include gaps in workforce skills. Providers need to bring "strategies for managing people, such as diversity management, managerial accounting systems including the use of KPIs, and robust corporate social responsibility practices and reporting," PWC's Supply Chain Management Institute says. ►



**Essa Al Saleh, CEO of  
Agility Global Integrated  
Logistics**

## Global hotspots

**Spotlight on Agility in Emerging Markets**

*Agility is an emerging markets leader with a presence in many of the countries and regions considered logistics hotspots.*

- 2012 Operations Start Date
- Presence in Major Cities
- # of employees
- Warehousing



*The ability to identify and manage risk will become a critical component in sustaining and growing business in developed and emerging markets*



## Global hotspots

**LEFT:** Agility is providing supply chain continuity for its customers in Egypt.

**RIGHT:** Agility's presence in the EAC states has grown substantially. Despite accelerating economic growth, this is not an easy area for companies looking to establish a presence.

### Capacity constraints

Many countries are constrained by poorly maintained or underdeveloped roads, ports, rail networks and airports (Papua New Guinea, Haiti). In others, there are limited numbers of trusted carriers and other vendors (Iraq). Others are plagued by weak distribution networks, shortage of storage options, lack of automation or unreliable power supplies.

"All of these things pose risk, whether you are moving goods inbound or outbound," says Al Saleh. "Anything that increases dwell times in port lengthens your turnaround time and raises your costs. The same goes for anything that delays inland movements."

### Lack of transparency

Regions with immature legal systems, lack of effective arbitration and dispute resolution, poor customs frameworks, and corruption, collectively, constitute hot spots.

Gaps in transparency typically mean longer waits at the



border for security, verification, searches, and audits. And where legal and regulatory systems are weak, there usually are few suppliers and distributors capable of meeting international standards.

The best practices that customers take for granted elsewhere can be foreign concepts: standardized batch management, packaging and palette dimensions, refrigeration, containerization, communications via Electronic Data Interchange, and tracking, tracing and RFID.

Says Al Saleh: "The fact that your logistics provider is ISO-certified in Germany is irrelevant. How good are they at building a solution in a place where international standards don't exist?"

### Financial issues

Payment and capital flow problems are typical in hotspots and are manifested in underdeveloped payments and banking systems, difficulty obtaining insurance at reasonable rates, and volatile or uncertain commodity, currency or energy prices.

"Many transportation and logistics companies have had to pay a high premium to cover possible risks to their assets and cargo. In the future, insurance companies might refuse to underwrite some types of large risks. If transportation and logistics companies are no longer able to offset risk through insurance, logistics costs might soar," says PWC's Supply Chain Management Institute.

### DEALING WITH FINANCIAL EXPOSURE

- Analyze and monitor currency and financial infrastructure
  - Perform due diligence on trading partners and their financial institutions
  - Consider hedging strategies
  - Seek third-party financing to ensure supplier liquidity
- Source: Supply Chain Risk Leadership Council

"Risks outside the control of individual organizations – from terrorism to weather to currency shifts and political upheavals – have been escalating furiously," says Logistics Management magazine. ▶

### WHAT TO EVALUATE WHEN SOCIAL UNREST THREATENS TO DISRUPT BUSINESS

Social inequity, combined with a seemingly growing willingness of local populations to challenge existing systems, is virtually certain to create risks for businesses and their global operations. What companies should ask themselves:

- Where do we have supply chains or operations that are exposed to risks from social inequities?
- How would we continue to operate in the event of massive protests, port closures, or even an overthrow of a government?
- Do we have a backup plan or dual sourcing?
- Do we begin to shift or restructure operations to mitigate these risks?

Source: Supply Chain Risk Leadership Council

## Global hotspots



### The most vulnerable

The margin for error in many hotspots is nil. By nature, they offer little backup or redundancy and few alternatives to critical links in the supply chain. The cascading effect of any disruption is powerful and immediate: customers see inventories back up, sales decrease, production idles, costs increase.

"The most vulnerable companies are those heavily reliant on lean logistics and the just-in-time distribution model," says *Logistics Management*.

Because demand in hotspots accelerates or decelerates with little warning, supplying them using lean techniques isn't practical. And because they possess so many inherent weaknesses and risks, hotspots typically can't serve as sourcing locations in lean supply chains.

The Supply Chain Risk Leadership Council, an industry organization that studies risks, says outsourcing, globalization, lean processes and geographical concentration of production have boosted supply chain efficiency – and risk.

"Many enterprises have risk management protocols that can address localized disruptions. However, recent high-profile events have highlighted how risks outside the control of individual enterprises can have cascading and unintended consequences that cannot be mitigated by one organization alone," the council says.

*Agility's GCC subsidiary builds, operates and supplies catering, housing and sustainment infrastructure in remote areas such as the Iraq oilfields, Papua New Guinea, and the Australian outback.*

### Local conditions shape response

Customers moving goods into and out of hotspots need providers who can engineer tailored supply chains that gain resilience from local knowledge, on-the-ground experience and built-in flexibility, Al Saleh says.

Successful providers shape the practices and processes they use elsewhere to meet and provide value under conditions they find locally. That means risk quantification, scenario planning, data and information sharing, business continuity planning, quality standards, vendor compliance and supplier audits. One key: the ability to build trusted networks across business and government in a hotspot.

The logistics industry has intensified its focus on identifying risk in hard-to-work places. Deloitte, for instance, has identified 200 current and emergent risks across the global supply chain. But one of the biggest risks can be the inability to gauge cost and ensure that it remains stable.

"The economics of supply chains in hotspots don't fit the norm," Al Saleh says. "Things like lack of transport infrastructure, congestion and a shortage of affordable storage space create all sorts of problems. You have to factor in higher on-site storage requirements, low service levels,

## Global hotspots

### WHERE RISK LURKS

Logistics providers operating in unstable, unpredictable environments require special skills. Strategic and operational risks associated with logistics and transportation are significant in much of Africa and parts of the Middle East, Asia, Latin America and the Caribbean. They include:

- Carrier delays and non-performance
- Capacity and allocation volatility
- Port, airport, road congestion
- Environmental regulations
- Regulatory and trade compliance
- Carrier/supplier concentration
- Carrier/supplier financial instability
- Inadequate infrastructure
- Hijacking, kidnapping
- Damage, loss of cargo
- Theft, pilferage
- Corruption
- Customer claims
- Cargo re-routing
- Customs penalties
- Weather events
- Natural disasters
- Armed conflict
- Political turmoil
- Labor unrest

poor on-time delivery – then figure out how you're going try to bring those costs down over time."

Supply chain-related expenses are often the largest component of a company's cost structure and ultimately determine profits. "Because it's the biggest opportunity to extract value, manufacturers may be unready to sacrifice ROI for another layer of security or risk mitigation," says *Logistics Management*.

### Stress testing and flexibility

Experts urge providers and their customers to perform stress tests on their supply chains after developing contingency plans and rehearsing various scenarios.

"The ability to identify and manage risk will become a critical component in sustaining and growing business in developed and emerging markets," says Infosys, the consulting company. "With most 3PLs and freight forwarders focused on expanding their network and establishing their presence in niche markets, the challenge of gaining early visibility to the associated risks is very real."

But there is disagreement about the value of planning and rehearsal for situations that arise in places where dysfunction and instability are the everyday reality. Being too wedded to a plan can inhibit flexibility and "lead to paralysis – being overwhelmed by the fast array of risks –

*Agility supports NGOs and aid organizations moving relief supplies to the massive refugee camps in South Sudan. More about this on page 33.*

where to begin? – or over-analyzing and trying to discover and address every risk," says *Inbound Logistics* magazine.

Lisa Harrington, co-author of *X-SCM: The New Science of X-treme Supply Chain Management*, urges customers and their providers to consider closer collaboration so that both parties have visibility across multi-layered supply tiers, collaborative quality panels, processes for pre-qualifying alternative core suppliers and pre-negotiations on key contracts. She cites the need for supply chains to "flux and flex at rapid pace" and emphasizes the need for providers, customers and suppliers to "sense and respond in real time."

For many supply chain companies, even some global leaders, that's too much.

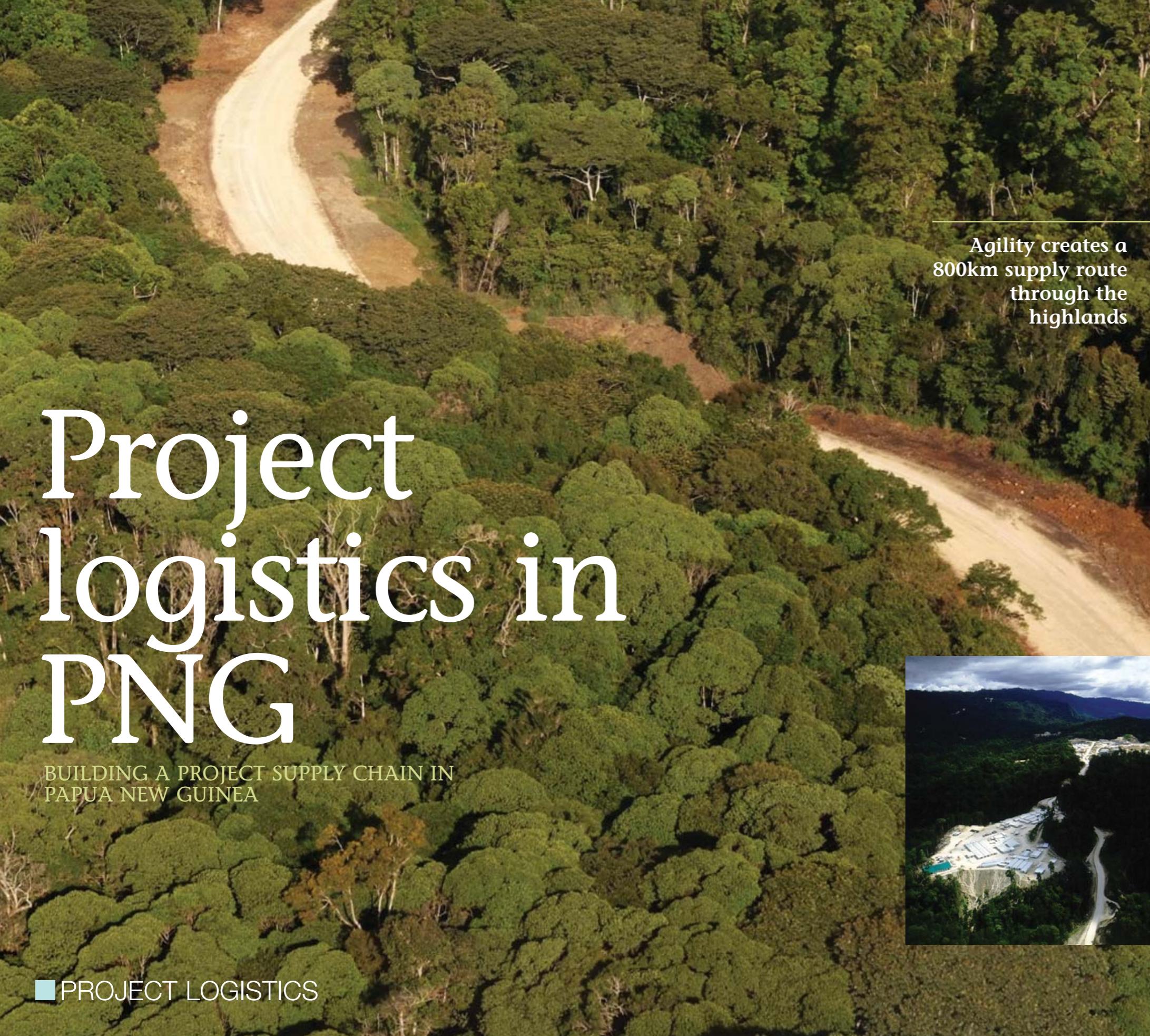
Emerging markets? Fine.

True global hotspots? Not yet, and maybe never. ■

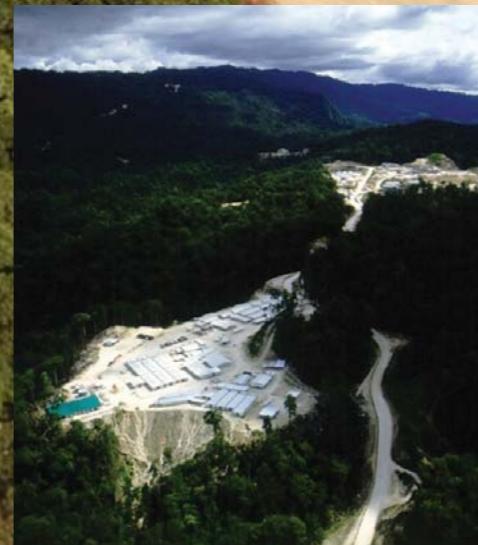


# Project logistics in PNG

BUILDING A PROJECT SUPPLY CHAIN IN PAPUA NEW GUINEA



Agility creates a 800km supply route through the highlands



**A**gility has been involved in delivering logistics solutions in Papua New Guinea (PNG) for over 20 years and is currently providing exclusive services to energy firms and engineering procurement companies (EPC's) constructing a major liquified natural gas (LNG) project.

Agility provides services to support this project through its Port Moresby and Lae branches, and dedicated supply bases and transport operation along the Northern Logistics Route, a 800km route linking the Port of Lae to the operating sites in the highlands of PNG.

#### Early infrastructure

Three months after receiving the go-ahead from the project owner in 2010, Agility's main supply base in Lae and its transport resources were operable. This formed an infrastructure backbone that is used to deliver construction materials, equipment and supplies to project sites and eventually to support project demobilization.



As the project consortium races to deliver gas in early 2014, Agility has been tasked with developing a complex air and road supply-chain, supported by strategically placed rear and forward operating bases, while balancing health safety and security concerns, environmental protection and productivity.

"Agility's goal has been to exceed its client's expectations whilst ensuring the safety of all stakeholders, handling of ►

*One of the camps in the highlands built and supplied by Agility.*

## Project logistics in PNG



freight and project targets," says Paul Booth, Agility's Director of LNG Projects in Australasia.

### Challenges

Work in the PNG interior is fraught with risk. Heavy rains are frequent, causing washed-out roads. Existing bridges are in poor condition and many have collapsed, needing replacement. Trucks and convoys can be blocked for hours,

even days, by landslides. On occasion, local land owner disputes have blocked convoys, throttling tightly scheduled equipment deliveries that are needed to move the project forward.

"People and infrastructure issues are the hardest to resolve in PNG," Booth says. "Our biggest challenge until the project closes will be maintaining health, safety and productivity in the face of these ongoing issues."

### Milestone for PNG

This LNG development will bring online Asia's first major source of cleaner-burning natural gas. It represents a milestone for the energy-starved region and an enormous opportunity for isolated Papua New Guinea, which has yet to benefit from Asia Pacific's rise and integrate itself into the regional economy.

Power companies and other customers in energy-hungry Taiwan, Japan and China are already lined up to buy PNG gas.



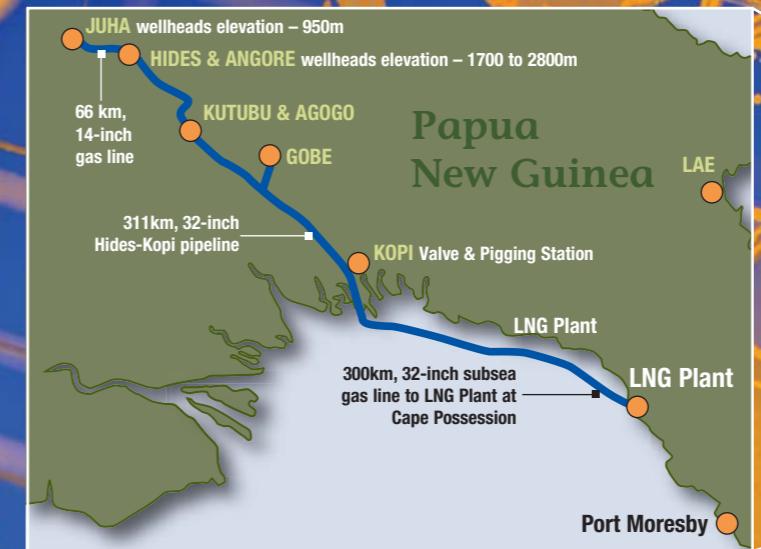
*It represents a milestone for the energy-starved region and an enormous opportunity for isolated Papua New Guinea*



### DID YOU KNOW?

Papua New Guinea (PNG) has more than 850 indigenous languages and at least as many traditional societies. Only Vanuatu exceeds this density of languages.

PNG is also one of the very few regions close to the equator where snowfall occurs at higher altitudes.



# Getting the job done



## Sustainment logistics presents its own special challenges

In Africa, Asia, the Middle East, the Caribbean and the South Pacific, international institutions and NGOs have looked to Agility to bring stability to supply chains that sustain peacekeeping forces, refugees, and victims of conflict and natural disasters. Lenny Petrucci, Senior Vice President of Operations for the Middle East/Africa, Agility Defense & Government Services, coordinates Agility's work with international institutions.

**Tradelanes:** How does your work for international institutions differ from what Agility does for commercial customers?

**Petrucci:** Our work for international aid organizations is performed largely in the developing countries of Africa,

Typically, these transactions originate in large donor nations in Europe and Asia, and we have to find a timely solution to deliver goods destined for Africa, the Middle East and Caribbean.

We use the same assets and capabilities that we draw on for commercial customers, but with international aid organizations there are added layers of compliance and special requirements such as bid bonds and performance bonds.



Lenny Petrucci,  
Senior Vice President  
of Operations for the  
Middle East/Africa,  
Agility Defense &  
Government Services



Middle East and the Caribbean – areas where we also do a great deal of commercial work. So they tend to complement one another, although sustainment logistics for international aid organizations often takes place outside of traditional trade lanes.

There are some other special things we have to be mindful of. We need to know what's going on at the local and customs clearance level. Often, there are tax exemptions or there is different treatment of taxes and a different process for clearance of goods ▶

## Getting the job done

support of aid or relief missions that are sponsored by the international donor community.

**TL:** Most global logistics providers boast that they've got a presence in emerging markets. Does that mean they can get the job done in the countries where you've been working with international institutions and NGOs?

**Petrucelli:** Not necessarily. We learned long ago that having a presence in a particular country and being able to operate there are two entirely different things. Let's take our Kenya and Somalia project as an example. We had a presence in Mombasa and Mogadishu, where we were working on projects. However, we also had local talent – people with intimate

knowledge, experience and relationships in the local marketplace. Prior to bringing the local talent on board, it was nearly impossible for us to get products moving. Once we had the right people in place, our operations sailed smoothly because we had people who handled customs clearance, bonded warehousing, transportation and local procurement. So my answer is this, it takes more than just a presence to get the job done. It takes the right local talent, combined with a global team, to get it done.

*The earthquake that struck Haiti in 2010 – the most destructive in the Caribbean region for 200 years – caused massive loss of life and hardship. In the ensuing months and years, millions of tons of goods were shipped to the island to aid its recovery.*



**TL:** What does it take for a provider to succeed in the kinds of environments you talk about?

**Petrucelli:** As I mentioned, one of the key components is the sourcing and placing of local talent, people who know the local business scene and local practices. They have an appreciation for the different ways of doing business, local work habits, how to get business done in various localities within a country, etc. Additionally, you have to be able to demonstrate that you've have solid past performance in difficult and challenging markets over a period of time. That's a key competitive differential – Agility's experience is second to none in developing markets.

We typically have good relationships at the main logistics hubs

## Getting the job done



*122 aircraft movements were required to ship drilling rigs to Afghanistan for the creation of a reliable water supply to serve military and civilian personnel in remote areas. Turn to page 19 to read about Agility's involvement in the sale, recycling and disposal of the massive quantities of non-military goods that have accumulated in Afghanistan since 2001.*



where we deal with customs for sea, air, and land. Good local partners in all modes of transportation and warehousing. Having the ability to communicate across different time zones and different work weeks, not necessarily around the clock, but appreciating and respecting those different schedules so we can expedite goods through the various mazes (air, sea and border crossings).

**TL:** What trends do you see in this kind of logistics?

**Petrucelli:** While the world is getting smaller, the number of places that can be considered "hotspots" is increasing. The number of conflicts, natural disasters and other events that trigger international intervention is on the

## Agility recognized as an industry leader

Agility was singled out as one of a handful of industry leaders in a recent Gartner report, The Magic Quadrant for Global Third-Party Logistics Providers.

The report defines industry leaders as companies that "show strength in ability to execute and completeness of vision, which includes their understanding of the market and customers' needs. Compared with their competitors, they offer a broader set of



integrated services across significant global regions. They score better on providing customers with continuous improvement and innovation, and provide specialized solutions within particular industry segments. They also demonstrate excellence in operations, customer service and responsiveness."

"Gartner is an objective, authoritative and well-respected source," said Tarek Sultan, Chairman and Managing Director, Agility. "We believe the report recognizes our strength in emerging markets and our specialty capabilities, and this is very encouraging. In terms of how our customers see us, it is clear our values of integrity, teamwork and personal service are bringing us closer to them as their needs change."

Gartner is the world's leading information technology research and advisory company. The Magic Quadrant for Global Third-Party Logistics Providers charts the progress of the largest global third-party logistics providers as they strive to meet changing customer demand.

# Clean-up in Afghanistan

TIDYING-UP A WAR ZONE

## Agility helps UK forces to clean-up and move on



**B**ritish commanders in Afghanistan describe efforts to wind down the presence of UK forces by the end of 2013 as the largest and most complex logistics challenge they have faced since World War II.

A year ago, they turned to Agility to handle the sale, recycling and disposal of the massive quantities of non-military goods that they have accumulated in Afghanistan since 2001.

Since then, Agility has received, stored, inventoried, marketed, sold and shipped thousands of tons of construction material, vehicles, generators, containers and other gear used by UK forces in the country.

Proceeds from the sales "have already produced a significant cash return to UK taxpayers. Perhaps even more important, the equipment has *not* been transported home to the UK at vast expense. It's been a great deal for the UK," says Chris Murray, vice president of Agility Defense & Government Services, Europe. "Some of the items are sold into the local Afghan market, so much of this equipment will help an emerging economy as it develops."

### Camp Bastion

The Agility team operates from Camp Bastion, the vast British military base near Kandahar in Helmand Province in southern Afghanistan. Bastion has been the collection and storage point for most of the material UK forces are handing over to Agility.

The quick success of the UK forces' disposal effort prompted Australian, Danish and Estonian forces, along with other British government departments, to ask Agility to take on disposal of their non-military items, as well.

Before winning the disposal

contract, Agility already had a strong relationship with the UK Ministry of Defence, running the MoD's worldwide household goods and relocation contract, known as the Global Removal Management Services contract, and managing transportation of UK personnel on Cyprus.

Agility's global footprint and established commercial presence in Afghanistan, Pakistan and the United Arab Emirates helped it win the disposal contract in 2012. The ramp-up – deployment of the team to Afghanistan and the first sale of UK inventory – took just two months.

### Invaluable experience

Murray, a former British Army officer and past director of the UK's Royal Logistic Corps, knew what British forces would confront based on his own experience as the last commander of British forces in Bosnia in 2007. Now a civilian heading the Agility team at Camp Bastion, he has drawn on Agility Europe for IT expertise; Agility Afghanistan for trucking, local sales and coordination with ocean and air movements; Agility Pakistan for help coordinating cross-border moves; and Agility Dubai for help with storage and international sales.

"The geography is a massive challenge. Afghanistan is a land-locked country. Air movement is expensive. Surface movement is expensive and dangerous," Murray says. "We knew the environment would be tough. We knew we had to get organized at speed, and we knew the customer would be demanding and require us to be flexible."

The Agility team has been surprised by some of the material it has received, which includes running machines,

### DID YOU KNOW?

The most complex and challenging logistics operation ever mounted in modern times is the D-day invasion of Nazi-occupied France, mounted from the south coast of England. On one day, June 6th 1944, 156,000 Allied troops landed on five beach-heads in Normandy.

The 'armada' involved 5,000 ships and landing craft, 50,000 vehicles and 11,000 aircraft. Over the course of the next five days, more than 326,000 troops crossed the English Channel. The Allied troops were drawn from The United States, United Kingdom, Canada, Free France and Norway.

motorcycle helmets, chainsaws, miles of cable, outboard motors, pine doors, an aircraft tug, handcuffs, and two airfield de-icing machines. What can't be stored is recycled or safely disposed of, rather than merely dumped.

In emerging markets and global hotspots, "you tend to be breaking new ground. You need to be flexible and agile, and the scale can sometimes overwhelm you," Murray says. "But hotspots can create weird, unique market conditions. Afghanistan has been a ferocious hotspot. We have to do our very best to understand and mitigate any threats because this is logistics at the violent end of the supply chain. The cost of failure is high." ■



# Egypt struggles to find footing

BUSINESS CONTINUITY IS ELUSIVE



Ahmed Aly, CEO of  
Agility Egypt

In the face of  
unrest, Agility  
works to preserve  
supply chain

Against a backdrop of political, economic and social uncertainty, Agility continues to serve contract logistics customers in Cairo two years after the Arab Spring of 2011. With a major distribution center, freight forwarding operations and project logistics capabilities, Agility is a logistics leader in Egypt. Ahmed Aly, CEO of Agility Egypt, gives *Tradelanes* readers an insider's view of the business climate there.

Consumer goods companies and others doing business in Egypt have struggled to bring reliability and predictability to their operations amid the political turmoil and sporadic violence that have destabilized the country since early 2011.

Street demonstrations helped topple the Mubarak government. Mohamad Morsi, who swept to power in 2012, was pushed aside by the Egyptian military after massive protests in July. The strain on supply chain providers has barely eased, but some have learned to cope. "It's been a



tough experience, but the days of unrest in Egypt have made us stronger," says Ahmed Aly, CEO of Agility Egypt. He says Agility has been able to maintain supply chain continuity for the past two years by maintaining focus on the security of its employees and its customers' assets.

#### Focus on the essentials

The anti-Mubarak demonstrations that began in January 2011 quickly brought on challenges: port strikes, fuel and power shortages, curfews and security checks. The disruption posed immediate and specific threats to security and a smooth functioning supply chain. Closed ports prevented inbound and outbound goods from moving. Diesel shortages ►

## Egypt struggles to find footing



A vessel approaches the Suez Canal Bridge at El Qantara, also known as the Shohada 25th January Bridge and the Egyptian-Japanese Friendship Bridge (the latter in recognition of the contribution by Japan to the cost of the bridge construction).

### A MARVEL OF 19TH CENTURY CONSTRUCTION

In 2019 the Suez Canal will celebrate its 150th anniversary. It took 11 years to create the 101-mile waterway, of which 75 miles were excavated. The cost when the canal opened in November 1869 was approx. \$100 million.

Close to 8% of world trade moves through the canal and it is the shortest sea route between east and west, saving significant time and fuel compared to routing south around Africa. 50 ships pass through the canal daily. In 2010 the canal was dredged to a depth of 66 feet (20m), which allows 60% of the world's bulk tankers to complete the transit.

halted trucks in their tracks. Warehouse temperatures soared due to power outages. Curfews played havoc with normal work schedules and staffing.

"In 2011 and 2012, we saw rioting and lawlessness and witnessed acts of looting and destruction, arson and attacks on public and private property, including some banks and hotels. The military declared curfews in greater Cairo, Alexandria and Suez from six in the evening until seven o'clock in the morning. Those steps were taken to ensure public safety, but they complicated our efforts to serve customers," Aly says.

The situation deteriorated further amid a showdown between the military and Morsi supporters.

Through it all, Agility has worked closely with a security consultant to identify routes that employees can use to get

safely to and from the 6th of October City distribution center each day. The company's in-house Quality, Health, Safety and Environment (QHSE) team has stepped up, as well. The QHSE team has taken steps to safeguard the Agility warehouse route and position customers' trucks so as to avoid vandalism and hijacking. It has tested fire equipment, developed an employee-evacuation plan and kept communications flowing to employees via safety alerts. Long hours and little sleep have been the norm at times. When protests and street violence have peaked, distribution center employees have executed an evacuation plan to take them out of harm's way. A real-time communications network has enabled the most efficient use of personnel with the least risk.

Strikes, protests and outbreaks of violence throughout the Cairo area have occasionally rendered main thoroughfares impassable. Closed roads meant no transport – no movement of goods. The disruption has forced Agility to use all hands at the distribution center to work on customer service issues, regardless of their normal jobs. The team's number one goal is to maintain a degree of supply chain continuity. Since the majority of Agility's customers in Egypt deal in fast moving consumer goods (FCMGs) or food

### BEYOND WAREHOUSING

#### Freight forwarding and project logistics in Egypt

More than 100 customers rely on Agility for freight forwarding. Agility offices in Alexandria, Port Said and at the Damietta and Cairo airports deliver a wide range of supply chain services, including air and ocean freight, and customs clearance and distribution, to international customers such as Kraft, ABB, P&G and IKEA and a slew of local manufacturers and retailers.

Agility's project logistics experts are in demand for movement of oversize cargo into and throughout the country. Agility is equipped for the pressing requirements of such diversified sectors as power, oil and gas, government and industrial.

When cuts in electricity created an urgent need for an electrical rotor to be delivered from Singapore to Alexandria, GE Power Services turned to Agility. Project logistics specialists quickly mobilized resources from across Agility's global network to deliver the 100-ton rotor. Praise from the customer acknowledged the professional and technical efforts exerted by each one of the Agility team while handling the rotor shipment. Demand for movement of oversize cargo into and throughout the country comes from such diversified sectors as power, oil and gas, government and industrial.

## Egypt struggles to find footing



The Agility distribution centre at 6th of October City.

### AGILITY IN EGYPT

Agility's largest footprint is in 6th of October City, an urban area 32 km from the Cairo city center. Established in 1979, this satellite city boasts a major industrial zone, an airport, financial sector services, seven universities and a technology hub, Smart Village. In 6th of October City, Agility operates a 43,000 sq.m. dry warehouse that serves multi-national, regional and local customers. Goods for

Marks & Spencer, Club Aldo, Landmark and Universal, one of Egypt's major producers of home appliances, are managed here. The modern facility offers 60,000 pallet positions on diversified racking systems equipped with fire-protection sprinklers. Material handling lifts and warehouse equipment transfer goods to 67 loading docks.

and beverages, continuous throughput is essential.

Information relayed across Agility's global network alerts customers to on-the-ground developments and keeps them abreast of the status of incoming and outgoing shipments, local and international. Agility's security consultant flags hot spots and identifies alternate routes for customers. At one point, the warehouse team advised a customer to park 20 of its trucks out of view at Agility's distribution center for protection from damage and theft.

### Blueprint for the future

A huge portion of world trade – 7.5 percent – moves through the Suez Canal. So turmoil in Egypt has an immediate effect on global trade. Freight volumes, both in-country and export, are down substantially, and warehouse vacancies have risen. Unrest in the country has left foreign investors and businesses wary. Only 13 percent of trade and logistics professionals surveyed in Agility's 2013 Emerging Markets

Logistics Index believe that Arab Spring countries (Bahrain, Egypt and Tunisia) are ready to grow and absorb investment in the near term. The situation has made it hard to offer competitive solutions, and customers are distracted. Agility's ability to forecast business market status was initially impaired, but is now on track.

Despite Egypt's difficulties, Agility is upbeat about the future. Aly is optimistic that Egypt's economy and business climate will improve. "In spite of all the turmoil, or maybe because of it, we have turned to a new page," Aly says. "Our team came through not only intact, but stronger. We are more focused, more customer oriented and ready to deal with what comes next."

Says Essa Al Saleh, President and CEO of Agility GIL, "Egypt holds so much potential because of its size and location. If it can restore political stability and send the right signals to the domestic and international business communities, it can rebound quickly." ■

# CSR report maps progress

SUSTAINABILITY & COMMUNITY ACTION



Over the past two years, Agility has made major gains in sustainability and has significantly expanded its community engagement. The progress is captured in *DRIVING CHANGE*, the company's 2013 CSR report. Seven awards in the period 2011-12 bring to 18 the total number of CSR and sustainability awards the company has received in its drive for continuous improvement.

#### Environmental progress

During 2011-12, Agility mapped the carbon footprint of more than 70 percent of its core logistics operations for the first time and partnered with major customers to reduce their carbon emissions. The company is working with customers, employees, subcontractors and suppliers in an

*BELOW: Frank Clary, Agility's Senior Humanitarian Project Manager, on location in Indonesia.*



25

effort to improve sustainability performance. It has also expanded its internal campaign to drive energy efficiency and waste management efforts.

Agility is pursuing ISO 14001 certification throughout its global operations. This certification sets out the criteria for environmental management practices. Nearly 40 percent of Agility employees work in ISO 14001 certified sites.

Throughout Agility's logistics operations, customers are offered free carbon emissions reporting for their shipments. This can help to point to potential areas for improvement. For example, Agility partnered with a major customer to consolidate goods in transit, resulting in a reduction of carbon emissions by 9 percent on more than one million kg of airfreight.

#### Community involvement

Agility's strong presence in emerging markets gives the company an opportunity to contribute in the



## Global solution for pharma supply chain

Agility and H. Essers' Pharma Logistics division have been awarded a long-term contract as preferred logistics providers for Actavis.

Actavis is a global specialty pharmaceutical company focused on developing, manufacturing and distributing generic, brand and biosimilar products.

Agility and H. Essers will operate a control tower that provides Actavis with full visibility into its global freight movements and unified data set, and also delivers the logistics business intelligence Actavis was seeking.

Agility's team is based in Bristol in the UK; H. Essers' team operates out of company headquarters in Genk, Belgium. Operationally, Agility manages the control tower function and global air and ocean movements; Essers handles European road freight.

The contract highlights the strength of Agility's life sciences expertise and the capability of its Pharmaceutical Competence Center, which operates specialized cold chain logistics and provides expert support across the Agility network.

"We are proud to have been awarded this contract by Actavis," said Stephan Dulk, Agility's VP, Life Science, Europe. "It underlines how innovative technology can supercharge the management of pharmaceutical supply chains while delivering intelligence that helps our customers make smart business decisions. It also further strengthens Agility's position as a leading logistics provider in the pharmaceutical industry."

"We are already seeing extremely positive results from the control tower and regard this as potentially the biggest logistic improvement for Actavis," said Valgeir Petursson, Executive Director, Logistics - International Operations, at Actavis.



communities where it is present – primarily through initiatives aimed at youth and education, health, and environmental action. In 2011 and 2012, Agility volunteers in 60-plus countries launched more than 300 community projects that ranged from building schools in Cambodia, Indonesia and Sri Lanka to raising money for disadvantaged children in the Americas and Europe and helping children in the Middle East get access to education and entrepreneurship opportunities.



Agility logisticians helped the International Medical Corps deliver aid relief to more than 480,000 people living in refugee camps in South Sudan. They also transported relief supplies after natural disasters in the Philippines, Pakistan, and Italy, and helped the humanitarian community carry out famine relief in the Horn of Africa. Agility also maintained its commitment to disaster response as part of the Logistics Emergency Teams (LETs) initiative launched under the auspices of the World Economic Forum. To date, the LETs teams have assisted with the response to disasters

provides protection and safeguards for migrant workers in the Middle East. This includes training more than 80 percent of the workforce in the region and conducting fair labor audits.

"As with all companies, we know that we have more to learn and more to do," says Tarek Sultan, Chairman and Managing Director. "Our CSR report helps us see where we are on our journey – the progress made and the road ahead." ■

# Ready for action



To improve its preparedness for humanitarian disasters, the United Nations World Food Program (WFP) and the Logistics Cluster are assessing a worldwide network of staging areas that can be quickly mobilized in the event of a disaster.

These staging areas are located in regions where disaster risk is high and where good airport, port and other logistics infrastructure and resources are present. Following a disaster, the staging areas offer a vital component in the humanitarian response.

This strategy requires that logistics capacity assessment be completed for any location where a possible staging area might be activated. To complete an assessment, the WFP-led Logistics Cluster deploys specialists to gather information on port and airport capacity, road and rail networks, storage facilities, customs and handling procedures, service rates and local transportation resources.

Agility, A.P. Moller-Maersk, TNT

Express and UPS help make the assessments as members of the Logistics Emergency Team (LETs) established in 2008 by the World Economic Forum to work in partnership with WFP and the Logistics Cluster.

Agility and other members of the team have supported the humanitarian community's response to more than 40 emergencies. In the last two years, the LETs members have conducted logistics capacity assessments in Nigeria, Turkey, Kuwait, Indonesia, Rwanda, and the Dominican Republic. For more

information about WFP and the Logistics Cluster, please visit: [wfp.org/logistics](http://wfp.org/logistics) and [logcluster.org](http://logcluster.org)



# Iraq moves forward

AGILITY INVESTS



**Iraq is enjoying rapid economic growth but it's not a market for the fainthearted**

Ten years after the fall of Saddam Hussein, Iraq continues to tantalize and bedevil. Hardy investors have established themselves in a handful of sectors, including consumer products, telecoms, banking, hotels and, of course, energy, which still accounts for 90 percent of government revenue and 80 percent of foreign exchange earnings.

Yet periodic spikes in violence keep many potential investors on the sidelines in spite of the country's rapid economic growth. Iraq remains plagued by sectarian tension and friction between the central government in Baghdad and the largely autonomous Kurdish north. Even so, the economy is projected to grow 9 percent this year after growing 8.4 percent in 2012.



Rumaila in the south of Iraq is the world's third largest oil field.

## Energy sector

Agility has been on the ground in Iraq for 10 years, investing in assets and partnerships, building a network of suppliers, developing infrastructure, and helping customers navigate the formidable challenges on the ground. This fall, Agility is opening the Rumaila Energy Park, a one million-square meter industrial park that will serve as a one-stop shop for oil and gas companies operating in southern Iraq.

The energy sector, now crowded with multi-national oil and gas producers and service providers, has gotten the lion's share of investment and attention. The International Energy Agency says Iraq will contribute 45 percent of the world's incremental oil supply this decade and will be the world's No. 2 oil exporter by the 2030s. ►

## Desert locomotives

Saudi Archirodon, known throughout the Middle East for its large-scale marine and industrial projects, tapped Agility's resources and know-how to transport two massive rail locomotives from the US to Saudi Arabia. The locomotives, weighing a combined 300 tons and valued at \$5million, were destined for SRO, the Saudi Railway Authority that operates Saudi Arabia's rail network.

Rail transport is set to play an important part in the expansion of The Kingdom's freight transport capacity. Several major rail freight projects are in the pipeline including a new 950km rail link between the port of Jeddah and Riyadh, and a new line linking the Gulf ports of Dammmam and Jubail.



## Best 3PL in Asia

Agility picked up *Best Third Party (3PL) Provider* at the prestigious Asian Manufacturing Awards 2013.

The awards recognize companies that have achieved excellence in technology solutions and as value-add service providers. Agility was selected for the award based on four criteria; solution innovation, customer impact, client engagement and regional market penetration.

## Iraq moves forward

### SERVICES FOR THE OIL INDUSTRY

Multi-national energy companies are working to produce oil, provide oilfield services and explore for new oil deposits, working alongside Iraq's national oil industry. Agility's provides many of the multi-nationals with vital services, including:

- Camp construction
- Catering
- Housekeeping
- Laundry
- Waste management
- Fuel & water
- Recreational support
- Utilities maintenance
- IT services
- Transportation
- Freight management
- Customs clearance
- Documentation
- Permits
- HSE compliance
- Warehousing & storage
- Delivery
- Project cargo
- Heavy lift
- Air, sea charters
- Convoy & logistics management
- Protective security details
- Static security service
- Security consulting
- Labor supply

### Insight

Agility entered the market a decade ago and arrived with several advantages. Among them were its strong existing capabilities in neighboring Kuwait, Jordan, Turkey and UAE; global energy industry expertise; and emerging markets experience, along with an appetite for new frontiers.

"We already had a great deal of insight into the Iraqi economy, and we were able to put that to work relatively quickly," says Samir Berqdar, CEO of Agility Global Integrated Logistics (GIL) for Iraq. "We also had significant resources – warehouses, trucks, IT support, technical experts – right across the border in our other operations. We've been able to use those to build up our capabilities in Iraq."

Today, Agility has offices in Baghdad, Basra and Irbil. It provides services in all of the major gas and oil fields that are producing or under exploration. Agility customs clearance teams operate at all major airports, border crossings and at the port of Umm Qasr. Agility owns a sizeable minority stake in Korek, a leading Iraqi mobile phone operator that is rapidly upgrading broadband services in the country. Iraqi nationals comprise 70 percent of Agility's in-country workforce.

### Broad spread of services

"We have invested in Iraqi service providers. That's allowed us to support their expansion, bring efficiency to their operations, tap into their supplier networks, and add to the

### SOME OF AGILITY'S WORK FOR ENERGY INDUSTRY CUSTOMERS IN IRAQ.

- Freight forwarding for UK multi-national oil company moving cargo from various global locations to and from Majnoon oilfield.
- Transportation, freight management, procurement and local customs clearance for US-based multi-nationals with exploration concession blocks in Kurdish north.
- Import, customs clearance, warehousing, HSE compliance and multi-modal deliveries via Kuwait, Umm Qasr port and Basra airport for Chinese energy giant operating in Halfaya field.
- Freight forwarding for a leading oilfield services multi-national including multi-modal shipments, customs clearance, documentation, permits, HSE compliance, warehousing.
- Air charter for 11 gas turbines shipped from Baghdad to Calgary for repair and back via Sharjah to Musayab and Al-Quadisia power stations.

range of services we can offer locally," says Berqdar.

Agility offers freight forwarding, ocean freight, air freight, road freight, project logistics, construction, real estate development and supply chain solutions in Iraq. Its GCC Services unit is the leading provider of life-support services and construction for the oil and energy industry, serving companies and contractors from the UK, China, Russia, Netherlands, France, the United States and other countries. GCC offers camp hospitality and management services, camp construction, facilities maintenance, security utility supplies and waste management services.

### Rumaila investment

"Agility's decision to develop the Rumaila Energy Park grew out of our belief that multi-nationals operating in Rumaila,

*We have invested in Iraqi service providers. That's allowed us to support their expansion, bring efficiency to their operations, tap into their supplier networks, and add to the range of services we can offer locally*

the world's third-largest oilfield, wanted modern infrastructure and facilities that were built to suit their needs." says Ajay James, CEO of Agility Real Estate. "The park features roads, electricity, water, drainage, sewers, a fuel station, emergency services, and IT and communications networks."

"Over the next few years, the largest increase in oil production will be in Rumaila, Qurna, Zubayr and Majnoon, fields that are all close enough to be served by the park," says Rashad Sinokrot, CEO of Agility GCC Services. "They will have modern offices, workshop space, maintenance facilities, storage and nearby housing. We've taken a very austere area and turned it into a secure, efficient hub that has everything they need." ■

**BELOW LEFT:** Some of the 804 truckloads of pipe shipped from Shanghai to the Luhais/Shubba oilfields for a state-owned Iraqi customer.

**BELOW RIGHT:** Agility moved three giant desalters and dehydrators from China to the Halfaa oilfield.



# Fuel for relief operations

AGILITY TRISTAR IN SUDAN

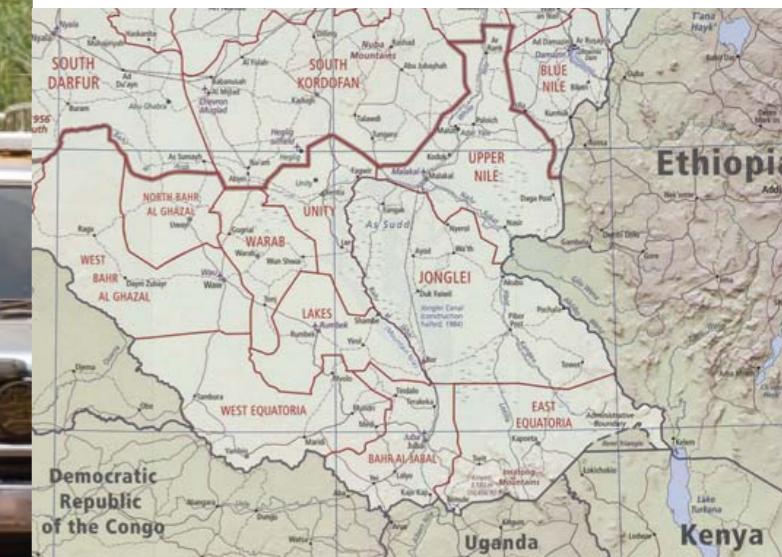


Agility Tristar plays a vital role in maintaining access to fuel

**W**ithout access to fuel in remote areas of Africa, the peacekeeping and relief operations that are aimed at preventing conflict and sustaining millions of displaced persons would be impossible.

The difficult, dangerous work of getting fuel to peacekeepers, relief workers and camps frequently falls to Agility TriStar, a specialist in the storage and movement of fuels.

"In many parts of Africa, weather, terrain, poor road networks and security risks limit or rule out the long distance movement of fuel overland," says Eugene Mayne, TriStar CEO.



*Relief operations in the new nation of South Sudan present major logistical challenges.*

"Movement by air has limitations, too," he says. Most of the aircraft capable of carrying bulk fuels are military aircraft. In cases where air is the only option, TriStar has modified civilian aircraft to ferry fuel to isolated camps and bases, taking care to use tanks that meet international certification standards for carriage of dangerous goods by road and rail, by river and sea, as well as by air.

"Air is expensive, and quite often you can't move enough of it to make sense. On top of that, tank modification and installation is time-consuming and requires a lot of care," Mayne says. "To be efficient, we've had to become masters of the rivers wherever we've worked in Africa. In many places, you have to build your supply chain around barge movements." ▶

## Fuel for relief

**Nile operations**

TriStar has been building, commissioning and operating fuel barges in South Sudan, a struggling new nation that achieved independence from Sudan in 2011 after years of civil war and ongoing conflict with various armed groups.

More than 223,000 registered refugees are in camps in South Sudan, mainly in the states of Unity and Upper Nile. Camps in the central and northern regions of South Sudan sit amid vast malarial swamps. With torrential rains for nearly eight months of the year, this terrain is treacherous, if not impossible to navigate. Refugees, medical staff and animals can easily become stranded. And in many cases,

barges, helicopters or air charters are the only feasible means of transport.

The swamps pose severe health risks. Adequate supplies of fuel are essential to efforts by international institutions and non-governmental groups to provide medicine and health care in the camps.

TriStar moves large volumes of fuel up the Nile River from the South Sudan capital of Juba to depots at northern locations using two 600 cubic meter barges and a pusher tug. To distribute fuel from the Malakal depot to even more isolated areas, TriStar uses smaller, self-propelled deck barges.



## Fuel for relief



ABOVE: A Tristar fuel storage depot, typical of the many Tristar installations in Africa.

LEFT: One of Tristar's custom-built fuel barges on the Nile.

**Jet fuel stores**

TriStar also built tank farms to store Jet A1 fuel to service an international institution with aid operations in Sudan. It constructed a supply chain to import, store, distribute, dispense and account for 60 million liters a year of ground and aviation fuels, and provided retail and storage operations in 24 locations across an area one-third the size of the continental United States. TriStar set up aircraft refueling operations at 15 remote sites, most of them inaccessible by road.

In the Democratic Republic of Congo, TriStar devised a river distribution system that enabled it to ship fuel by barge, then quickly dismantle loads for transportation by truck and trailer to move past waterfalls and un-navigable portions of the river, before loading back onto barges.

## *TriStar moves large volumes of fuel up the Nile River from the South Sudan capital of Juba to depots at northern locations*

*Fuel Handler*, a leading industry publication, cited TriStar for its ingenuity and creativity in Africa. "Whether it was a dug-out canoe carrying a bag of rice or a modern smart reefer with mesh technology that is transported by mammoth cargo barges on mighty African rivers, Tristar looked at all routes and methods of distribution," the magazine wrote. ■

**Five-year deal with KNPC****Door-to-door logistics in 42 countries**

Agility has won a new contract with the Kuwait National Petroleum Company (KNPC), one of the leading oil companies in the Middle East. The five-year contract is worth an estimated \$24.4 million.

To move shipments of goods and equipment procured by KNPC worldwide, Agility will provide ocean, air and road transport services to 42 countries. Agility will supply KNPC's projects with spare parts, pipes and oversized parts that require special handling. It will also provide procurement and purchasing, origin logistics, customs clearance, freight forwarding and local transportation in Kuwait and the country of origin.



"As one of the largest oil refining companies in the world, we were looking for a global logistics partner who could match our scale, understand our needs and meet our demanding operational standards worldwide," said Fahed Al Ajmi, Chairman and Managing Director, KNPC. "In Agility, we have found such a partner."

**Natural Gas event contract**

Agility has been awarded a contract to manage logistics services for Gastech 2014, which will be held at the Kintex Exhibition Center in Seoul, South Korea, March 24 – 27, 2014.

Agility Fairs & Events will be the official freight and on-site handling contractor and will be responsible for assisting exhibitors and their contractors with logistical and shipping requirements of exhibits to and from the show.

Now in its 41st year, Gastech is the global meeting place for the energy industry and brings together thousands of commercial and technical industry professionals. The exhibition showcases more than 400 international exhibitors and is supported by 21 leading governing bodies throughout the industry.

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## About Agility

Agility brings efficiency to supply chains in some of the globe's most challenging environments, offering unmatched personal service, a global footprint and customized capabilities in developed and developing economies alike. Agility is one of the world's leading providers of integrated logistics. It is a publicly traded company with \$5 billion in revenue and more than 22,000 employees in 500 offices across 100 countries.

Agility's core commercial business, Global Integrated Logistics (GIL), provides supply chain solutions to meet traditional and complex customer needs. GIL offers air, ocean and road freight forwarding, warehousing, distribution, and specialized services in project logistics, fairs and events, and chemicals. Agility's Infrastructure group of companies manages industrial real estate and offers logistics-related services, including e-government customs optimization and consulting, waste management and recycling, aviation and ground-handling services, support to governments and ministries of defense, remote infrastructure and life support.