



# Drewry Supply Chain Advisors

Our capabilities

<https://www.drewry.co.uk/supply-chain-advisors>



Maritime Research

Maritime Advisors

Supply Chain Advisors

Maritime Financial Research

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# Welcome to Drewry

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**Drewry** is a leading international provider of research and consulting services to the maritime and shipping industry with unrivalled experience and expertise across all market sectors from containers and ports to tankers and dry bulk.

From our origins in 1970 London to a 21st century maritime and shipping consultancy, Drewry has established itself as one of the most widely used and respected sources of impartial market insight and industry analysis.

We provide our services through four business units: Drewry Maritime Advisors supporting the needs of shipping and financial institutions; **Drewry Supply Chain Advisors** providing ocean freight procurement support to retailers and manufacturers; Drewry Maritime Research publishing market-leading research on every key maritime sector; and Drewry Maritime Financial Research delivering an Investment Research Service on listed companies operating in the industry.

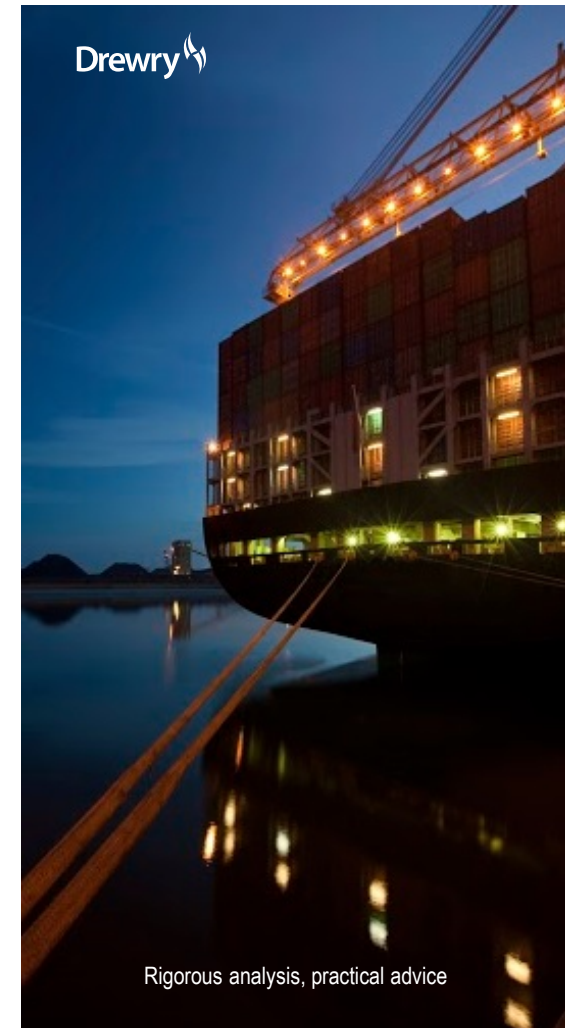
We employ over 100 professionals across an international network of offices in London, Delhi, Singapore and Shanghai.

Maritime Research

Maritime Advisors

Supply Chain Advisors

Maritime Financial Research



# Drewry Supply Chain Advisors

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We focus on advising users of international multi-modal transport services, taking our extensive understanding of the industry and applying it to all stages of the supply chain.

We offer a range of procurement support services which empower importers and exporters, providing them with the tools, resources and tailored advice they need to more effectively manage their transport service providers and international supply chains.

Through our complete service offering, clients benefit from insight, advice and support to help improve transport procurement and reduce costs.

## Our services include:

- Freight cost benchmarking
- Ocean and air freight procurement and bid support
- Ocean freight procurement and transport management
- E-business impact and strategy advice
- Commercial due diligence
- Network strategy and optimisation
- Hinterland logistics and intermodal analysis

[www.drewry.co.uk](http://www.drewry.co.uk)



## Fast facts – Drewry and Supply Chain Advisors

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**1970**

We were founded in 1970 and opened our first office in London that same year

**4**

We serve our clients from offices in London, Delhi, Singapore and Shanghai

**96**

The number of professionals we employ across our international office network

**3,000**

Since we were founded in 1970 we have worked with over 3,000 clients in more than 100 countries

**37**

Number of countries where we have clients subscribing to our supply chain/ocean freight support research products

**686**

We aggregate and maintain spot market container freight rate benchmarks against 686 global trade routes

**\$2.3bn**

Maintaining an exclusive seafreight cost benchmarking club comparing costs on more than \$2.3bn of freight spend (Jan '18)

**2m teu**

Maintaining an exclusive seafreight cost benchmarking club comparing costs on over 2m teu of freight (Jan '18)

# Research Services: Benchmarking, market studies and forecasts

We provide a comprehensive portfolio of market research services that help inform everyday commercial decisions as well as business strategy and planning of exporters and importers. Drewry Research is recognised by a global audience of senior industry stakeholders for its objectivity, rigour and quality of analysis.



**Container Freight Rate Insight:** The world's first and only global source of container spot market freight rates on all the major routes. A 'must have' tool for importers, exporters, freight forwarders and other industry stakeholders who require up-to-date and independently researched container shipping cost benchmarks. The service is hosted at <http://www.drewry.co.uk/cfri>



**Drewry Benchmarking Club:** An exclusive, participation-based online service allowing importers and exporters to confidentially benchmark their contract shipping costs against their peers – based on genuine, shipper-only, buy rate comparisons. Now available for both Dry and Reefer containers.



**Sea and Air Shipper Insight:** A monthly-update annual subscription service providing the latest information and analysis for both the ocean and airfreight markets, including airfreight rate benchmarks on 57 trade lanes.

# Advisory Services: Rigorous analysis, practical advice

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Our advisory assignments cover a broad spectrum of commercial issues – from high level e-business strategic planning and network optimisation of exporters/importers' transport and supply chains to overseeing the entire ocean freight procurement process.

- **Market studies and forecasting:** Identifying key market trends, carrying out impact assessments and new opportunities
- **Freight cost benchmarking:** Verify costs, measure commercial performance and identify where improvements/savings can be made
- **Ocean and air freight procurement and bid support:** Management and optimisation of the entire ocean and air freight procurement process through a combination of cutting-edge technology, operational best practices and robust benchmarking data
- **Carrier service contract terms and negotiation strategy:** to maximise supply chain cost effectiveness
- **E-business impact and strategy:** to optimize supply chains thanks to technology, assess the technology capabilities of logistic suppliers and defining a digital supply chain transformation program, as a vendor neutral advisor
- **Network strategy and optimisation:** redesign and optimise networks, exploit market opportunities. Supply chain mapping and redesign to pinpoint where efficiencies can be built into processes
- **Commercial due diligence** and operational benchmarking
- **Hinterland and intermodal solutions:** Inter-port and intermodal competition studies – port competitiveness as part of an integrated transport system

# Ocean Freight Cost Benchmarks

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We have been aggregating, mining and publishing ocean freight rate intelligence for over a decade and were the first to publish benchmark container spot market freight rates in 2006. Our ocean freight cost benchmarking services fall broadly into three categories: spot market rates, contract rates, and reefer rates.

- **Spot market rate intelligence:** Our flagship spot market benchmarking service, *Container Freight Rate Insight*, <https://www.drewrycfri.co.uk> is one of the most widely referenced in the shipping industry.
  - Container freight rate data is updated bi-monthly on all 686 routes, monthly on high volume trade lanes and weekly on five key trades via Drewry's Hong Kong-Los Angeles Benchmark and data from the World Container Index.
  - Key trade routes covered include the transpacific, Asia-Europe, transatlantic, Middle East & South Asia trades, North-South trades (South America, Africa & Oceania), intra-Asia and intra-Europe trades.
- **Contract rate intelligence:** The *Drewry Benchmarking Club* is an exclusive, participation-based service which allows its members to anonymously compare ocean contracts with peers.
  - Exclusive to shippers, our *Benchmarking Club* allows participating members to confidentially compare their contract shipping costs, transit times and free time against their peers. Drewry provides members with a tailored analysis of the rate benchmarks and cost saving opportunities, as well as freight rate forecasts for major trade routes to fully support each member's procurement process.
- **Reefer freight rates:** To support shippers of refrigerated cargo, our *Reefer Benchmarking Club*, offers targeted, commodity specific benchmarks of total cost, routing and ancillaries.
  - The Reefer Benchmarking Club mirrors the Benchmarking Club in its exclusivity and confidentiality, and allows us to focus diligently on the specific characteristics and needs of shippers of refrigerated cargo. Benchmarks can be made on total cost as well as individual cost elements, routing and transit time, and ancillary charges.

We work with ocean freight procurement and logistics teams within global manufacturers and retailers, advising and guiding them through complex sourcing events while applying the latest best practices to reduce costs and maximise productivity and performance.

- Our e-Sourcing Ocean Freight Solution (eSOFS™) is a cutting-edge advisory and sourcing event execution service which brings efficiency and transparency to the management of the most complex and data intensive sourcing events.
- eSOFS™ is part of an end-to-end ocean freight procurement solution providing lifecycle and event support combining industry best practices with real-time freight rate benchmarking data to enable your organisation to achieve, sustain and deliver future competitive advantage. This rigorous cost management and procurement solution draws on a rich seam of maritime industry experts with experience supporting complex multimode /multi-route instructions for an elite client base of global brands in retailing and manufacturing.
- By combining real-time market intelligence, industry experience and cutting-edge technology, we help ocean freight procurement teams achieve their commercial objectives.


Our advisory assignments cover a broad spectrum of commercial issues – from high level strategic planning and network optimisation to overseeing the entire ocean freight procurement process. Case studies showing examples of work carried out by Drewry Supply Chain Advisors can be found at: <https://www.drewry.co.uk/experience>



# Ocean freight procurement and transport management

Ocean Buying Group offers 'best in class' shipper ocean sourcing outcomes, addressing the needs of small and medium sized shippers.

- A shipper's rate competitiveness and priority to a carrier is directly related to number of containers an organisation controls and ships with that carrier. As the ocean industry continues to change with mergers and acquisitions, limiting competition and leverage, smaller shippers are being left behind.
- Ocean Buying Group is designed to provide "big" shipper value, to companies that are often outsized by competitors. ***It's no fee, no commitment, no operational change solution*** that combines real-time market intelligence, industry experience and cutting-edge technology, to help ocean freight procurement teams achieve their commercial objectives.

Item	FRWR/NVOCC	Direct Carrier Contract	Ocean Buying Group
Competitive year round rates (no GRI, PSS)			
Rate transparency			
Carrier of Choice			
Transportation Spend Management Portal			
Market intelligence			
No commitment penalty			



# E-Business Impact and Strategy Advice

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To optimize supply chains thanks to technology, assess the technology capabilities of logistic suppliers and define a digital supply chain transformation program, as a vendor neutral advisor

BCOs are facing rapid changes in the international shipping industry. Consolidation of 3PL and carriers, compliance and regulations, new technology applied to transport and logistics. They are facing several challenges:

- What are the risk and opportunities brought by new technologies in shipping?
- Are their existing logistics network embracing technologies?
- What will be the impact of technology on their supply chain?
- Can supply chain technology bring a competitive advantage to their business?

We provide an expert review of the technology landscape in shipping: technology changes and trends affecting each player of the BCO's supply chain - shippers, 3PLs and forwarders, ocean carriers and intermodal vendors.

We provide a technology assessment of the impact of digital shipping.

- ✓ Risk of loss of competitiveness vs best practice or as an opportunity for improved supply chain service and cost efficiency;
- ✓ Assessing supply chain technology impact on cost and service delivery.

# Commercial Due Diligence

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We are the partner of choice to support commercial due diligence of logistics companies or assets, trusted by corporate acquirers, investors and multinational vendors.

- Robust, independent commercial due diligence is a critical part of any successful merger or acquisition. It is more than an assessment of risk, we believe it's about validating the business plan and strategy which is critical to achieving long term commercial success. Our deep sector expertise, market understanding and reputation as an industry thought leader underpins our strength in this area.
- Drewry acts as a commercial due diligence expert on both the buy side (acquisitions or financing due diligence) or the sell side commercial due diligence of specialised logistics assets such as container barge services, inland river or rail terminals and port-based warehouse assets. Customers rely on our experience of international shipping and intermodal transport, our knowledge of logistics providers' competition, costs and prices, our contacts with many logistics customers and our unbiased independent position.
- These services complement the commercial due diligence services of Drewry concerning ports and ships.

Our advisory assignments cover a broad spectrum of commercial issues – from high level strategic planning and network optimisation to overseeing the entire ocean freight procurement process. Case studies showing examples of work carried out by Drewry Supply Chain Advisors can be found at: <https://www.drewry.co.uk/experience>



# Who we work with

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Our clients include:



**Exporters/Importers** – international retailers and manufacturers, who require mapping, evaluation and improvement of international supply chains and/or carrier pricing and contract support



**Logistics service providers** who require additional and independent project resources and independent verification/support relating to evolving developments in international, integrated supply chains. This includes secondary distribution operators seeking to add an international dimension to their process



**Port authorities and terminal operators** who need advice on port-based distribution centres and logistics



**Finance and legal companies** working on due diligence/acquisitions of logistics service providers or other specific projects

# Our clients

We provide project-based ocean freight procurement and network optimisation advisory services to an elite and diverse international client base of shippers and industry stakeholders.

- International manufacturers and retailers
- Logistics service providers
- Transportation companies
- Port authorities and terminal operators
- Legal service providers
- Banks and financial institutions

Some of the international clients with whom we have worked since 2012:



# Case Studies

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**Client:** Ansell Healthcare

**Project:** RFI/RFQ (eSOFS™) and direct carrier transition

**Client situation:** As a leading international healthcare provider seeking to transition from NVOCCs to direct ocean carrier contracts, Ansell selected Drewry's e-Sourcing Ocean Freight Solution (eSOFS™) to manage its ocean freight procurement event and advise on the direct carrier transition.

*"Drewry's advisory team brought professionalism and invaluable insight to all stages of the RFI and RFQ process, from managing the global tender and liaising with bidders to scenario analytics and inter-party communication and co-ordination. Our team was impressed by both the team appointed and the solution presented - and very satisfied with the results achieved. I would be happy to recommend Drewry to other companies."*



**Client:** M&S

**Project:** International Logistics Procurement Strategy

**Client situation:** Retailer with a volume of c 20,000teu of maritime freight per annum sourced predominantly from India, Bangladesh, China and Asian countries. Requires extensive purchase order and shipping order management at origin. High levels of visibility required in supply chain.

*RESULT: In the initial year about 30% of M&S volume was transferred to FOB shipment with order process control split between two main logistics suppliers to avoid over-dependence. Subsequently more than 80% was shifted to M&S direct contracts with carriers. We believe that M&S moved from having some of the highest industry shipping costs to the lowest competitive quadrant.*



**Client:** Great Bear

**Project:** Ocean Freight Tender Management

**Client Objectives:** Review the Request for Information (RFI), Request for Quotation (RFQ) and freight rate template documentation. Provide a list of potential carriers and freight forwarders for the RFI. Provide advice on best practice ocean freight procurement, including alternative pricing structures and contract durations.

*"Drewry provided insightful analysis on current container shipping market trends, commercial risks and potential future market developments, ensuring that the Great Bear procurement team was kept well informed."*

# Case Studies

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**Client: Port Authority of Jamaica**

**Project:** Kingston port evaluation study as regional logistics hub

**Client situation:** The Port Authority of Jamaica needed to prepare for period after the opening of the enlarged Panama Canal. Two studies were commissioned, the first on the long term effects on Kingston as a transshipment port in the region. The second to assess specific port centric logistics site opportunities for a role as a regional logistics hub. The port centric site assessment involved a project in two phases.

*RESULT: The report identified a number of macro economic and industry issues that would need to be addressed for a successful development and suggested major changes to the intended site usage to allow profitable development. The Drewry study results were used with government and potential investors in the port.*



**Client: Large Japanese trading house**

**Project:** Identification of logistics investment targets in Africa

**Client Situation:** The client put together a phased plan to identify logistics targets, requiring specialist inputs from Drewry, its appointed external logistics consultant. The first step of this project was a market survey and forecast of exports and imports for major commodity groups of 16 target country markets in sub-Saharan Africa. The second step was an analysis, for 2 specific target countries, of the maturity of third-party logistics (3PL) activities, the main third-party logistics service providers, the market and opportunities, the main exports and imports and a list of recommended companies (ie local logistics players) to talk to about investments.

*"Our company found potential for logistic activities through the study and is now looking for specific projects based on the insights from the study."*



## Our consultants

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Drewry Supply Chain advice and consultancy is provided by practitioners with senior management experience. The consultants of Drewry Supply Chain Advisors in Europe, the US and Asia have practical, industry experience in:

- ✓ Distribution
- ✓ Forwarding
- ✓ International shipping contracts
- ✓ Intermodal transport
- ✓ Air freight
- ✓ Ports
- ✓ E-commerce, e-business and commercial processes
- ✓ Due diligence
- ✓ Other specialised logistics fields

Case studies showing examples of work carried out by Drewry Supply Chain Advisors can be found at: <https://www.drewry.co.uk/experience>

# Key personnel

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**Arjun Batra**  
Group Managing Director

Arjun Batra was part of the successful management buyout of Drewry Shipping in 2000 making him a shareholder and board member in Drewry Shipping Consultants. He assumed the additional responsibility of Advisory as Managing Director in 2006. Along with Nigel Gardiner, Arjun has been instrumental in setting up Drewry's international offices in India and Singapore bringing his considerable shipping finance expertise to bear in the expansion of the company.



**Tim Power**  
Managing Director, Head of  
Maritime Advisors

Tim Power is the operational Head of Drewry Maritime Advisors. Tim has worked for 31 years in container shipping and supply chain management. With P&O Containers he had roles in container logistics and trade lane management, spending 6 years running Far East-Gulf and services. He joined the company's new Global Logistics division in 1995 where he ran the UK operation which provided supply chain management, project cargo, airfreight and consolidation services.



**Philip Damas**  
Director, Head of Supply  
Chain Advisors

Philip Damas heads up Drewry Supply Chain Advisors, the logistics arm of the Drewry Group and has more than 30 years experience in the international ocean transport sector and maritime supply chain design and optimisation.

Prior to joining Drewry in 2005, he worked for CMA CGM and the container shipping consortium Cobra in various management and financial control roles until 1990.



**Stijn Rubens**  
Senior Advisor

Stijn Rubens joined Drewry in 2014 with 15 years' experience in shipping and logistics, ranging from break-bulk and chartering as a third party agent to controlling the European inland operations for a major container line.

Stijn holds an M. Sc. in Transport Economics and an executive MBA in general management from the University of Antwerp Management School.



**Chas Deller**  
Consultant

Chas Deller has 39 years experience in international freight forwarding (ocean, air freight and overland). Previously global vice president, ocean freight at UTi Worldwide (now DSV).

At Drewry, recent projects included the global ocean event of United Technologies/Otis/Carrier group and the NVO-to-ocean carrier contractual transition and ocean bid of Ansell.



**Cath Earl**  
Senior Advisor -  
Benchmarking and Seafreight  
Procurement

Cath Earl has worked as Eurobuyer Logistics - Global Seafreight and European Logistics Contracts Manager at Heinz, the US multinational. Cath has developed and managed Carrier and Service provider contracts, ensuring alignment with cost and service objectives. While at Heinz, Cath was preparing, carrying out and managing the group's full e-tender of 1,200 global routes and preparing and negotiating contract agreements. Cath manages the Drewry Benchmarking Club.

# Key personnel

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**Martin Dixon**  
Senior Advisor

Martin Dixon is Head of Research Products and is a director of Drewry Group. He has more than 30 years' strategic and operational experience in shipping and supply chain management. Martin has followed a wide and varied career in international logistics and maritime intensive supply chains. With an initial background in logistics operations with DHL and London-based department store group Harrods, he broadened into general management roles with German forwarding/logistics group, DB Schenker.



**Philippe Salles**  
Head of e-Business

Philippe Salles has 30 years of experience in the container shipping sector, focussed on e-business. He was managing director, EMEA for the global booking portal INTTRA. Previously, he was eCommerce & Partner Master Data Director at CMA CGM.

Philippe has advised exporters, importers, forwarders, ports and others on digitisation and e-business in shipping.



**Yvette - Yingzhi Zhang**  
Senior Analyst

Yvette Zhang is a senior analyst based in Drewry's Shanghai office. Prior to joining Drewry, Yvette had 6 years' working experience in logistics and procurement functions in the FMCG sector and shipping digitisation in the information technology sector. She has been involved in several supply chain cross-functional assignments including category management, planning and ERP implementation.



**Nidhin Raj**  
Senior Analyst

Nidhin Raj is the Product Manager of the monthly spot rate benchmark report – the Container Freight Rate Insight. His responsibility comprises of in-depth trade route analysis covering supply, demand and freight rate analysis of major container trade lanes covering Asia-Europe, Transpacific, Transatlantic, Asia-Latin America and Africa routes.



The primary source of market insight, analysis and advice trusted by a global audience of maritime and shipping industry stakeholders.

### Maritime Research

#### Market Sectors

Container Shipping  
Ports and Terminals  
Dry Bulk  
Gas Shipping  
Tanker Shipping  
Specialised Shipping  
Ship Management  
Logistics Management  
Intermodal Transport

### Maritime Advisors

#### Advisory Expertise

Market Analysis  
Strategy and Planning  
Market Entry Analysis  
Operational Due Diligence  
Technical Due Diligence  
IPO Support

### Supply Chain Advisors

#### Advisory Expertise

Ocean Freight Cost Benchmarking  
Ocean Freight Procurement Support  
Network Design and Optimisation  
Commercial Due Diligence  
Hinterland Logistics Analysis

### Maritime Financial Research

#### Market Sectors

Container Shipping  
Container Manufacturing  
Ports and Terminals  
Dry Bulk  
Gas Shipping  
Tanker Shipping

#### Advisory Expertise

Credit Analysis  
Bond Analysis

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