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BUTADIENE PRICES

Europe and US prices hit record levels on strong demand and limited crude C4 supplies **14**

US MDI

Global market expected to tighten over next two years, prompting new capacity additions **47**

April 11-17, 2011

Periodicals Entry

ICIS Chemical Business

ANALYSIS OF CHEMICAL MARKETS



The ICIS Top 50 Chemical 3PLs

We launch this special annual feature on the world's leading third-party logistics providers (3PLs) serving the chemical sector

JOSEPH CHANG NEW YORK
WILL BEACHAM LONDON

We are pleased to introduce our very first ICIS Top 50 Chemical 3PLs listing, showcasing the world's major third-party logistics providers to the chemical sector.

3PLs can be a vital part of the chemical supply chain, providing services such as warehousing, shipping, freight forwarding and other aspects of logistics management.

As the chemical markets become more global and complex, the role of asset-based and

As the chemical markets become more global and complex, the role of asset based and non-asset-based 3PLs (also known as 4PLs) will only rise

JOSEPH CHANG
Global editor, ICIS Chemical Business

non-asset-based 3PLs (also known as 4PLs) will only rise. The complexity and challenges of global and regional chemical logistics demands innovative solutions.

Whether you're a buyer or seller of chemicals, it is worth considering whether a 3PL could benefit your business.

There is a tremendous diversity of players and the services they provide. Many 3PLs are privately held, family-owned businesses such

as Switzerland's Bertschi and Germany's HOYER. Others are larger publicly traded companies such as US-based C.H. Robinson or divisions of these companies. Some are regional. Others are global. With the sheer variety of 3PLs worldwide, you should be able to find one that fits your business needs.

As sales figures were difficult to secure, we decided to make this listing alphabetical. However, for those 3PLs that disclosed sales to the chemical sector, we added a listing of these companies in a separate table.

A special thanks to the National Association of Chemical Distributors (NACD) and its president Chris Jahn, as well as the European Chemical Transport Association (ECTA) and its managing director, Colin Humphrey, for their invaluable support in this new effort.

We also thank chemical industry logistics veteran Paul Gooch, who is managing director of Switzerland-based consultancy The Logical Group, for helping us identify 3PLs and compile the listing.

We also had help from the UK's Chemical Business Association (CBA) and its director Peter Newport.

We aimed to identify as many 3PLs serving the chemical sector as we could, and are always open to hearing about new or other players we may have missed.

We trust you will find the ICIS Top Chemical 3PLs listing a valuable resource to help meet your logistics needs. We also welcome any feedback. ■

If we missed you in our listing, please let us know you're out there – drop me a line at joseph.chang@icis.com

AGILITY

Liverpool, UK

www.agilitylogistics.com

President and CEO, chemicals sector, Andrew Jackson

2010 Sales: \$6bn (€4bn)

2010 Chemical sector sales: NA

Geographies: Europe, US, Asia, Middle East
Agility's Specialty Chemicals business delivers value to its chemical and petrochemical industry customers by implementing practical, impartial and, most importantly, cost-saving supply chain solutions. Agility has a range of freight management and procurement services, in addition to operations outsourcing and systems capabilities. With both asset light and asset appropriate solutions to fit the needs of mature as well as rapidly growing markets, Agility is placed to meet the evolving requirements and challenges of this specialist sector.

ALFRED TALKE LOGISTIC SERVICES

Huerth, Germany

www.talke.de

Founder Alfred Talke; Director transportation division and health, safety, security, environment and quality Talke Services Klaus Wessing

2010 Sales: €318m (\$451m)

2010 Chemical Sector Sales: NA

Geographies: Europe, Middle East, Asia
TALKE group is one of the world's leading providers of logistical services to the chemical and petrochemical industries. TALKE Logistics Services has developed from its core activities – transporting and storing chemical products – into an integrated service partner for advanced outsourcing and third-party logistics solutions.

A.N. DERINGER

St. Albans, Vermont, US

www.anderinger.com

President and CEO Jake Holzscheiter; Secretary and vice president of administration Sandy Mayotte

2010 Sales: NA

2010 Chemical Sector Sales: NA

Geographies: North America
A.N. Deringer is a leading provider of international logistics services including freight forwarding, warehousing and distribution, customs brokerage, logistics consulting, and duty drawback. Deringer combines more than 30 US offices with a global partnership network to facilitate the movement of cargo throughout the world.

APL LOGISTICS

Singapore

www.aplogistics.com

President Jim McAdams

2010 Sales: \$1.3bn (€917m)

2010 Chemical Sector Sales: \$50m+

Geographies: Asia, Middle East, Europe, North America, Latin America
APL Logistics provides international, integrated supply chain services including both origin and destination services such as freight consolidation, warehousing and distribution management in more than 50 coun-

tries. It uses innovative information technology for maximum supply-chain visibility and control. APL Logistics is a unit of Singapore-based Neptune Orient Lines, a transportation and logistics firm.

BALTRANSA

Ciudad Real, Spain

www.baltransa.com

Director general Jose Luis Ruiz Heras

2010 Sales: €20m (\$28m)

2010 Chemical Sector Sales: €20m

Geographies: Europe
Baltransa offers a Spanish transport network. The sphere of the company's operations has grown to the point that its fleet covers the EU. The countries most frequented by its fleet include France, Germany, the Netherlands and Italy.

BDP INTERNATIONAL

Philadelphia, Pennsylvania, US

www.bdpinternational.com

President and CEO Richard Bolte

2010 Sales: NA

2010 Chemical Sector Sales: NA

Geographies: North America, Europe, Latin America, Asia, Middle East, Africa
BDP International is a privately held freight logistics/transportation management firm based in the US. It operates freight logistics centers in more than 20 cities throughout North America and a network of subsidiaries, joint ventures and strategic partnerships in 122 countries. BDP provides a range of services, including ocean, air and ground transportation; lead logistics process analysis, design and management; export freight forwarding; import customs clearance and regulatory compliance; project logistics; warehousing/consolidation/distribution; and web-based shipping transaction/tracking management systems.

BERTSCHI

Durrenasch, Switzerland

www.bertschi.com

President and CEO Hans-Jorg Bertschi

2010 Sales: €500m (\$709m)

2010 Chemical Sector Sales: €480m

Geographies: Europe, Russia, Asia, US, Latin America
Bertschi provides global logistics solutions for the chemical industry in tank and dry bulk containers, with focuses on safety, supply chain optimization and sustainability. It operates its own fleet of 15,000 tank and dry bulk containers, 15 intermodal rail terminals and 1,200 trucks. Bertschi is an integrated 3PL solutions provider, based on strong IT, specific chemical supply chain knowledge and project management capacities. It is a privately owned, family company.

CARDINAL LOGISTICS MANAGEMENT

Concord, North Carolina, US

www.cardlog.com

CEO Tom Hostetler; President and chief operating

officer Jerry Bowman

2010 Sales: \$274.1m (€194.4m)

2010 Chemical Sector Sales: \$4.5m

Geographies: US

Cardinal is a dedicated transportation solution provider in the US. Cardinal's logistics experts work directly with clients to optimize their supply chains by developing and implementing customized transportation solutions including specialized equipment and handling, and integrated technology. Services include dedicated contract carriage, home and jobsite delivery, transportation management, supply chain consulting, warehousing, distribution, bulk and chemical transport, and industrial and manufacturing logistical support services.

CATCH-UP LOGISTICS

Pittsburgh, Pennsylvania, US

www.catchuplogistics.com

President Ronald Pasekoff

2010 Sales: NA

2010 Chemical Sector Sales: NA

Geographies: US
Catch-Up Logistics is a logistics service company that has been providing service since 1995. This includes converting inbound raw material to outbound finished goods; storing dry, refrigerated or frozen goods; cross docking; less-than-truckload less-than-truckload, truckload, or customer pick-up. Its distribution centers are located across the US. The company handles more than 100 suppliers and 2,000 SKUs. Warehouses are located in Greensburg and Chambersburg, Pennsylvania, as well as in Davenport, Iowa.

CHEMLOGIX

Blue Bell, Pennsylvania, US

www.chemlogix.com

President and CEO J. Steven Hamilton

2010 Sales: NA

2010 Chemical Sector Sales: NA

Geographies: North America, Europe, Asia, Middle East, Latin America
ChemLogix is a provider of comprehensive chemical industry transportation management, technology, and supply chain consulting services that enable its clients to improve performance and drive economic value. ChemLogix aims to solve its customers' most vital logistics challenges by leveraging chemical industry expertise, best-of-breed technology and a personalized, high-touch approach to deliver measurable, sustainable value.

C.H. ROBINSON WORLDWIDE

Eden Prairie, Minnesota, US

www.chrobinson.com

Chairman, president and CEO John Wiehoff

2010 Sales: \$9.3bn (€6.6bn)

2010 Chemical Sector Sales: NA

Geographies: North America, Europe, Asia, South America, Australia, Middle East
C.H. Robinson Worldwide is one of the world's largest 3PL providers, providing freight transportation and logistics, outsource solutions, produce sour-

ing, and information services to more than 36,000 customers through a network of more than 230 offices worldwide. It provides access to more than 49,000 transportation providers worldwide, including contract motor carriers, railroads, air freight carriers and ocean carriers.

COMPREHENSIVE LOGISTICS

Youngstown, Ohio, US

www.complg.com

Principal and executive vice president Brad Constantini; senior vice president and general manager Brian Hume

2010 Sales: NA

2010 Chemical Sector Sales: NA

Geographies: US
Comprehensive Logistics Inc. (CLI) is a provider of engineered logistics services for complex supply chains. Founded in 1995, CLI manages more than 4m ft² (372,000m²) of facility operating space in the US and Canada and is certified to ISO 9001 and ISO/TS 16949 standards. A non-asset-based, end-to-end supply-chain services company with roots in the transportation industry dating back to 1903, CLI's core capabilities include supply chain management and distribution; transportation management; and synchronous manufacturing and value-added services, such as subassembly, sequencing, kitting, inspection, repacking and just-in-time logistics.

CTSI-GLOBAL

Memphis, Tennessee, US

www.ctsi-global.com

President and CEO J. Kenneth Hazen; senior vice president global sales Brian Scott

2010 Sales: NA

2010 Chemical Sector Sales: NA

Geographies: North America, Latin America, Europe, Asia, Middle East, Africa
Core services include freight audit and payment, transportation management system, business intelligence and global consulting. The company has more than 17,000 carriers supported, more than 250m annual transactions and hundreds of clients across all industries.

DAMCO

Copenhagen, Denmark

www.damco.com

Global head of chemicals Anthony Elwine

2010 Sales: \$3bn+ (€2.1bn+)

2010 Chemical Sector Sales: approx \$320m

Geographies: Europe, Asia, Middle East, Africa, North America, Latin America
As part of the A.P. Moller-Maersk Group, DAMCO offers a broad range of supply chain management and freight forwarding services to customers worldwide, and has 10,500 employees in over 280 owned offices across 90 countries with representation in 120 countries. DAMCO manages more than 2.3m TEU (20-foot equivalent units) of ocean freight and supply chain management volumes and over 60,000 tonnes of airfreight, annually.

DE RIJKE GROUP

Spijkenisse, the Netherlands

www.derijke.com

President L.H. De Rijke; Vice president J.L. Ravier

2010 Sales: €430m (\$609m)

2010 Chemical Sector Sales: 80% of sales

Geographies: Europe, Russia, Ukraine

De Rijke offers a total global solution linking various logistics activities and services. It is a privately held company and is able to offer a full logistics service with its own facilities in 10 European countries in more than 28 locations. De Rijke is also active in the Saudi Arabia through a JV called MDR as service provider to the local industry, enabling the link of the Middle East to Europe logistically. Its focus is mainly on chemicals, food-related industries and the packaging industry.

DHL SUPPLY CHAIN

Bonn, Germany

www.dhl.com/chemicals

Vice president, global sector development, energy and chemicals DHL supply chain Jonathan Shortis; Vice president, global head life sciences and chemicals, DHL global forwarding Nigel Wing

2010 Sales: €13.3bn (\$18.8bn)

2010 Chemical Sector Sales: NA

Geographies: Europe, Americas, Asia, Middle East, Africa

DHL Supply Chain provides many industry sectors with customer-focused solutions that span the whole supply chain. It aims to create competitive advantage for its customers. By offering warehousing, distribution, managed transport and value-added services, its goal is to ensure that products and information reach markets faster and more efficiently. Offering local insight and global scale our business spans the globe and is organized into industry sectors, including Energy & Chemical.

DUPRE LOGISTICS

Lafayette, Louisiana, US

www.duprelogistics.com

CEO Reggie Dupre; President Tom Voelkel

2010 Sales: \$124.1m (€87.5m)

2010 Chemical sector sales: \$110.8m

Geographies: US

Dupre Logistics enables chemical manufacturers and distributors to eliminate the invisible costs that occur in their supply chain. The company's Results-Based Supply Chain Management Process is designed to allow customers to increase productivity, permanently reduce cost structures and become more competitive and profitable. Dupre has more than 1,000 team members.

FORT STORAGE WAREHOUSING AND DISTRIBUTION

Winnipeg, Canada

www.fortstorage.com

Manager Alan Smith; Industry manager, Western region Kirk Moffat

2010 Sales: NA

2010 Chemical Sector Sales: NA

Geographies: Canada

Fort Storage Warehousing and Distribution is a leading provider of industrial warehousing, logistics and distribution services for clients across a variety of industries, with a focus on handling hazardous materials for agribusiness, chemical compounding, manufacturing, mining, forestry, oil and gas, paints, coatings, aerospace and construction. It is certified by the AWSA for the safe storage and handling of a wide range of hazardous materials.

FRESH WAREHOUSING & FULFILLMENT

Centreville, Illinois, US

www.freshwarehousing.com

Vice president John Cusumano

2010 Sales: NA

2010 Chemical Sector Sales: NA

Geographies: US

Fresh Warehousing & Fulfillment is a privately held hazmat, contract warehouse and fulfillment services company. The family-owned firm works with customers to create a cost-effective, strategic logistics program. Fresh Warehousing aims to create a solution matched to its customers' goals, and backs it up with ISO-based measures.

GEODIS WILSON

Clichy, France

www.geodiswilson.com

Global vertical market director Martin Svantesson

Geographies: Europe, North America, Latin America, Africa, Asia

A global logistics provider and wholly owned subsidiary of SNCF Group, Geodis is a European group with a worldwide scope, ranking number four in its field in Europe. The group's ability to coordinate all or part of the logistics chain (air and sea freight forwarding, groupage, express, contract logistics, transport of part and full truck loads, reverse logistics, supply chain optimization) enables it to support its customers in their strategic, geographical and technological developments, providing them with solutions tailored to optimizing their physical and information flows.

GROUP GHEYS

Balen, Belgium

www.gheys.com

Managing directors Dirk Gheys and Erik Vande Paer

2010 Sales: €35.8m (\$50.7m)

2010 Chemical Sector Sales: €30.5m

Geographies: Benelux region, Germany, France, Denmark, Italy

The logistics division covers activities at the customer's site and at its own multiuser locations. Specialized services include purging-degassing-drying, blending, de-dusting, sieving and optical cleaning. Its international transport company is involved in silotransport, general cargo and container transports. The company has inland container terminal and storage facilities for containers, packed goods, general cargo and bulk goods.

HESSENATIE LOGISTICS

Antwerp, Belgium

www.heslog.be

CEO Patrick De Keersmaecker; Head of sales and marketing Bob Van Steenweghen

2010 Sales: €25m (\$35m)

2010 Chemical Sector Sales: €5m

Geographies: Europe

Hessenatie Logistics has distribution sites in Boom, Kortrijk, Kampenhout and Antwerp. It has storage conditions for dangerous goods and expertise with packed chemicals. Past and current customers include DuPont, BASF, ChevronTexaco Lubricants, Q8 Oils and Turtle Wax.

HOYER

Hamburg, Germany

www.hoyer-group.com

Chairman of the supervisory board Thomas Hoyer

2010 Sales: €996m (\$1.41bn)

2010 Chemical Sector Sales: €521m

Geographies: Europe, Asia, US, Latin America, Middle East, Africa

Represented in 87 countries by 100% subsidiaries and agents, 27 branch offices and field offices in Germany, HOYER is an independent, family-owned firm. HOYER is structured in specialized business units focusing on transport, storage and transshipment of liquid and dry bulk products, tank cleaning, maintenance and repair as well as logistics consulting. It develops complex logistics solutions for the chemical, petrol, food and gas industries.

H.W. COATES

Leicestershire, UK

www.hwcoates.co.uk

Chairman Gerald Coates; Managing director Tom Coates

2010 Sales: £22m (\$35m, €25m)

2010 Chemical Sector Sales: £15m

Geographies: UK

H.W. Coates' core market is the warehousing and transport of packaged chemicals, where it claims to be number one in the UK market.

INLAND STAR DISTRIBUTION CENTERS

Fresno, California, US

www.inlandstar.com

Chairman and CEO Michael Kelton; vice president, business development Kyle Goodman

2010 Sales: NA

2010 Chemical Sector Sales: NA

Geographies: US

Inland Star Distribution Centers is a national third-party warehousing and distribution services provider. Inland Star says it is the only 3PL warehouse company that is a member of both the American Chemistry Council and the National Association of Chemical Distributors. Inland Star provides outsourced logistics services to product manufacturers in all market segments, utilizing more than 1.5m ft² (139,000m²) of public and contract warehouse space in five national locations.

THE HAZCHEM NETWORK

Rugby, UK

www.hazchemnetwork.co.uk

Managing director Ali Karim; Sales director Andrew Walker

2010 Sales: £6m (\$9.7m, €6.8m)

2010 Chemical Sector Sales: £6m

Geographies: UK, Ireland

The Hazchem Network says it is the UK's only pallet network dedicated to chemicals. With its Hazchem Emergency Response Service, it takes into account quality, safety, security and environmental considerations.

ISC GLOBAL AG AND ISC FAR EAST

Basel, Switzerland (Global headquarters) and Singapore (Regional headquarters)

www.iscglobaltd.com

President Wolfgang Partsch;

CEO Bernhard Frauendoerfer

2010 Sales: €210m (\$296m)

2010 Chemical Sector Sales: 50% of total sales

Geographies: Europe, Asia Pacific, US, Brazil
ISC – The "Independent Supply Chain" Company – says it is one of the very few true 4PLs in Europe and Asia. Some global leaders in the chemical industry switched from their 3PL/LLP to the "non-asset-driven" 4PL/ISC to reduce costs and improve performance, it claims.

JACOBSON COMPANIES

Des Moines, Iowa, US

www.jacobsonco.com

President and CEO Brian Lutt

2010 Sales: \$737m (€520m)

2010 Chemical Sector Sales: \$118m

Geographies: North America, Latin America, Europe, Africa, Asia, Middle East

Founded in 1968, Jacobson Companies offers end-to-end supply-chain management solutions around the globe. Service offerings include freight forwarding (ocean and air), customs brokerage, PO management, consolidation/deconsolidation, warehousing and distribution, contract packaging, and manufacturing and transportation management. Jacobson operates more than 35m ft² (3.3m m²) of warehouse space worldwide with about 7,000 employees.

J.B. HUNT TRANSPORT SERVICES

Lowell, Arkansas, US

www.jbhunt.com

President and CEO John Roberts

2010 Sales: \$3.79bn (€2.67bn)

2010 Chemical Sector Sales: \$30m

Geographies: North America

J.B. Hunt Transport Services focuses on providing safe and reliable transportation services to a diverse group of customers throughout the continental US, Canada and Mexico. Utilizing an integrated, multimodal approach, it provides capacity-oriented solutions centered on delivering value and industry-leading service.

KATOEN NATIE

Antwerp, Belgium

www.katoennatie.com

President Fernand Huts; Vice president Fabian Leroy

2010 Sales: \$1bn (€706m)

2010 Chemical Sector Sales: \$600m

Geographies: Europe, North America, Latin America, Africa, Asia, Middle East

Katoen Natie provides integrated and tailor-made logistics and engineering services to a key number of industries and a limited number of clients all around the world. Its base service is storage on a variable basis. Around this, different value-added activities such as packaging, blending, grinding, sieving and onsite operations have been added. Katoen Natie says it is the world's leading provider of logistics services for plastics.

KELRON LOGISTICS

Toronto, Ontario, Canada

www.kelron.com

Executive vice president and cochairman Keith Matthews; President Geoff Bennett

2010 Sales: \$100m (€71m)

2010 Chemical Sector Sales: NA

Geographies: North America

Kelron offers a full range of innovative transportation logistics services including transportation management, dedicated capacity, on-demand transportation, intermodal, warehousing/distribution and consulting.

LESAINTE LOGISTICS

Romeville, Illinois, US

www.lesaint.com

President Jeff Pennington; Executive vice president client solutions Dino Moler

2010 Sales: NA

2010 Chemical Sector Sales: NA

Geographies: US

LeSaint Logistics develops customized, integrated supply chain solutions for customers from a range of industries, with a specific focus on the chemical and retail sectors. With over 14 facilities across the US, LeSaint offers comprehensive logistics services, from warehousing, transportation and fulfillment to inventory management, dedicated contract carriage, hazardous materials management and value-added services.

LOGISTICS MANAGEMENT SOLUTIONS (LMS)

St. Louis, Missouri, US

www.lmslogistics.com

President and CEO Dennis Schoemehl

2010 Sales: \$124m (€88m)

2010 Chemical Sector Sales: NA

Geographies: US

LMS is a non-asset-based, third-party logistics firm that empowers chemical manufacturers to gain competitive advantages through optimal transportation management. Through its transportation management software and services, LMS aims to help shippers significantly improve their safety, cus-

tomers service and financial performance. LMS is a Responsible Care partner of the American Chemistry Council. In 2010, it had around \$600m in chemical freight under management.

LOGI TRANS EXPRESS

Atlanta, Georgia, US

<http://logitrans.smartbuynews.com>

Managing member Adam McDaniel

2010 Sales: \$6m (€4m)

2010 Chemical Sector Sales: NA

Geographies: US

Logi Trans is an asset-based 3PL provider that offers freight payment and audit, fully automated TMS support and use, less-than-truckload and truckload rate negotiation with full-scale capability to move and handle all loads, asset-based power units and trailers, and fully functional distribution warehousing centers to control inventory and increase efficiency for many different industries and/or markets. It also offers a fully staffed logistics department specializing in moving last-minute loads and daily lanes.

MENLO WORLDWIDE LOGISTICS

San Mateo, California, US

www.menloworldwide.com

President Robert Bianco

2010 Sales: \$1.5bn (€1.1bn)

2010 Chemical Sector Sales: NA

Geographies: North America, Europe, Asia, Latin America

Menlo Worldwide Logistics specializes in cost-effective, safe handling and transportation of chemicals. It aims to select carriers that specialize in chemical transportation – with trained, certified drivers and management. The company provides warehousing for packaged chemicals and performs packaging from bulk silos to gaylords. Menlo Worldwide Logistics designs and implements solutions for chemical logistics requirements.

MESSINGER TRUCKING AND WAREHOUSE

Newark, New Jersey, US

<http://messengertrucking.com>

President Jon Messinger

Geographies: US
Messinger Trucking and Warehouse, servicing the greater New York metropolitan area since 1923, is a family-owned and operated business specializing in the handling and storage of hazardous and non-hazardous chemicals. Its 300,000ft² (28,000m²) facility is located by Port Newark and the New Jersey Turnpike.

MONTREAL CHEMICAL LOGISTICS

Montreal, Quebec, Canada

www.mtlchem.com

President Kim Pattee

2010 Sales: NA

2010 Chemical Sector Sales: NA

Geographies: Canada

Montreal Chemical Logistics (MCL) is a division

of Vaudreuil Storage. MCL offers logistics support to firms that require short or long-term assistance with inventory and material management in an effective satellite distribution warehousing center.

NORBERT DENTRESSANGLE

Saint Vallier sur Rhone Cedex, France
www.norbert-dentressangle.com

Chairman Norbert Dentressangle
2010 Sales: €2.84bn (\$4.02bn)
2010 Chemical Sector Sales: €300m
Geographies: Europe, North America, Asia
Norbert Dentressangle is a major international provider of transport, logistics and freight forwarding services with 27,000 employees. It aims to develop high value-added solutions for Europe, North America and Asia, in accordance with its commitments in the area of sustainable development. Through the acquisition of the freight forwarding activities of Schneider Logistics in 2010, and the announced plan to acquire TDG, Norbert

Dentressangle will expand its geographic 3PL service presence.

ODYSSEY LOGISTICS & TECHNOLOGY

Danbury, Connecticut, US
www.odysseylogistics.com

President and CEO Bob Shellman
2010 Sales: NA
2010 Chemical Sector Sales: NA
Geographies: North America, South America, Europe, Middle East, Africa, Asia
Odyssey Logistics & Technology (OL&T) and its subsidiaries deliver a comprehensive portfolio of managed logistics and third-party services to the global chemical and process manufacturing industries. OL&T's technology infrastructure features a patented net-native transportation management system that supports the safe, reliable and efficient delivery of client products throughout the world. OL&T moves more than \$55bn (€38.8bn) in product value between 185,000 origins and destinations and 220

ports worldwide, servicing midsize to large global clients. OL&T manages a network freight spend in excess of \$1.5bn, interfacing with more than 2,000 logistics service providers.

PACIFIC COAST WAREHOUSE

Chino, California, US
www.pccw.com

President Jim Marcoly
2010 Sales: NA
2010 Chemical Sector Sales: NA
Geographies: US
Since 1927, Pacific Coast Warehouse has aimed to operate as an extension of its customers, focused on service. It is a privately owned company that aims to provide quality service, flexibility, technology and value-added services for effective supply chain management. As a member of the National Association of Chemical Distributors, Pacific Coast Warehouse can handle flammable, hazmat, industrial product storage, handling and distribution needs, including transportation services.

PENSKE LOGISTICS

Reading, Pennsylvania, US
www.penskelogistics.com

President Marc Althen
2010 Sales: NA
2010 Chemical Sector Sales: NA
Geographies: North America, South America, Europe, Asia
Penske Logistics is a wholly owned subsidiary of Penske Truck Leasing. Penske Logistics provides supply chain management and logistics services to major industrial and consumer companies throughout the world. Penske Logistics aims to deliver value through design, planning and execution in transportation, warehousing, and international freight forwarding and carrier management.

QUALITY DISTRIBUTION

Tampa, Florida, US
www.qualitydistribution.com

CEO Gary Enzor; senior vice president sales Randy Strutz
2010 Sales: \$687m
2010 Chemical Sector Sales: \$687m
Geographies: North America
Quality Distribution says it is the largest bulk carrier in North America with a presence across 130 terminals. The company also provides significant logistics solutions to many top chemical shippers in North America. Solutions include specialized equipment, dedicated fleets, door-to-door Mexico service, capacity planning, transloading, service monitoring, port drayage, and a variety of other customized solutions.

RINCHEM

Albuquerque, New Mexico, US
www.rinchem.com

CEO Bill Moore; President Charles Breinholt
2010 Sales: NA
2010 Chemical Sector Sales: NA
Geographies: North America, Europe, Asia, Middle East
Rinchem is a leading provider of chemical management services to the semiconductor, chemical manufacturing, pharmaceutical and biotechnology industries. The company positions itself as the lead logistics provider for the most demanding manufacturers, distributors and high volume end-users of pre-packaged specialty chemicals and gases that require radical reliability. Rinchem's network of warehouses and transportation fleet provides customers with customized, full supply chain management solutions related to chemicals and environmental concerns.

SCHNEIDER LOGISTICS

Green Bay, Wisconsin, US
www.schneider.com

President and CEO Chris Lofgren
2010 Sales: NA
2010 Chemical Sector Sales: NA
Geographies: North America (including Mexico), China
Schneider Logistics, a wholly owned subsidiary

of Schneider National, is a leading supply chain management provider for domestic and international shippers, including the chemical products sector. Schneider Logistics provides chemical 3PL supply chain management services to many of the world's leading chemical manufacturers including Honeywell Specialty Materials, Chevron Phillips Chemical's Performance Pipe Division and PolyOne. The company has received ISO certification, recognition as a Smartway Partner by the EPA and recognition as a Responsible Care Partner by the American Chemistry Council.

SEAWAY FORWARDING & LOGISTICS

Thessaloniki, Greece
www.seaway.gr

Managing director Isidoros (Sakis) Printezis; Health, safety, quality and environmental assurance director Stelios Moschidis
2010 Sales: €2.8m (\$4.0m)
2010 Chemical Sector Sales: €2.5m (\$3.5m)
Geographies: Greece, other Balkan countries
SeaWay has 10,000m² (107,600ft²) of custom bonded warehouses. It specializes in the storage and distribution of Polymers (LLDPE, HDPE, PET, PVC, etc). It is SQAS assessed by CEFIC for both warehousing and transport. It is a member of ECTA and participates in the chemical industry's Responsible Care program.

SUTTONS TRANSPORT GROUP

Cheshire, UK
www.suttonsgroup.com

Group managing director Andrew Palmer; International managing director John Sutton
2010 Sales: £106m (\$203m, €143)
2010 Chemical Sector Sales: NA
Geographies: Americas, Europe, Middle East, Asia
With more than 80 years of experience in transport, storage and bulk logistics worldwide, Suttons has become one of the leading specialist logistics companies in the world. Through its global office network and fleet of road tankers and ISO tank containers, Suttons aims to provide high quality, cost effective solutions for the transportation of bulk hazardous and nonhazardous liquids, gases and food.

TOTAL CONNECTION LOGISTICS

Union, New Jersey, US
www.totalconnection.com

President Luis Uribe; vice president Operations Jeff Bossen
2010 Sales: NA
2010 Chemical Sector Sales: NA
Geographies: US
Total Connection Logistics provides liquid/dry bulk transportation, truckload, less-than-truckload, intermodal, warehousing and distribution, third-party logistics, and tank truck leasing. It provides a complete program of integrated services. It is a service-oriented, customer-focused business. Its headquarters are near the Port of New York and major East Coast

highways. Total Connection Logistics has more than 10,000 carriers, with nationwide coverage and a network of logistics partners.

USA CONTAINER

Piscataway, New Jersey, US
www.usacontainer.com

President William Gold; Senior vice president Joseph Ilvento
2010 Sales: \$28m (€20m)
2010 Chemical Sector Sales: \$28m
Geographies: US
As a 3PL provider including warehousing, filling, container distribution and freight services, USA Container serves a variety of industrial, consumer and pharmaceutical companies. With the addition of its food grade, rail side facility, and close proximity to the pier, it has the experience and capabilities to provide a wide array of services.

WEBER LOGISTICS

Santa Fe Springs, California, US
www.weberlogistics.com

Chairman Nicholas Weber; Director, Client Solutions Chuck Mikel
2010 Sales: NA
2010 Chemical Sector Sales: NA
Geographies: US
With 86 years of experience, Weber Logistics has evolved into a nationwide provider of logistics solutions. Weber's expertise includes non-asset-based freight management, temperature sensitive asset-based less-than-truckload and truckload services, dedicated and shared warehousing, distribution, cross-docking/pool distribution, transloading, network optimization modeling and analysis, retail compliance, order fulfillment, material handling, and supply chain management. Weber operates a chemical logistics service in the western US for distributing all types of chemical and industrial products, including import/export, nationwide trucking and cross-docking services. Its 220,000ft² (20,400m²) Los Angeles-based distribution center is divided into 14 multiple temperature and hazardous materials rooms for handling flammable liquids, corrosives, oxidizers and poisons.

W.H. BOWKER

Preston, UK
www.bowkertransport.co.uk

UK operations director Bill Bowker and commercial director Neil Bowker
2010 Sales: NA
2010 Chemical Sector Sales: NA
Geographies: Europe
Founded in Blackburn in 1919, W.H. Bowker grew rapidly to become one of the UK's premier transport specialists with a reputation for the highest levels of service and an innovative approach to industry's transportation needs. Today, Bowker uses its large versatile fleet based at its Lower Tier COMAH site in Preston to provide high performance logistical solutions to the chemical industry.

TOP 3PLS RANKED BY DISCLOSED SALES TO THE CHEMICAL SECTOR				
Company	HQ	Chemical sales	Sales	Regions covered
HOYER	Hamburg, Germany	€521m	€996m	Represented in 87 countries by 100% subsidiaries and agents, 27 branch offices and field offices in Germany
Quality Distribution	Tampa, Florida, US	\$687m	\$687m	North America
Bertschi	CH-Duerrenaes	€480m	€500m	Europe, Russia, CIS, Turkey, Asia, US, South America
Katoen Natie	Antwerp, Belgium	\$600m	\$1bn	Europe, Canada, US, Mexico, Brazil, Uruguay, Africa, Vietnam, Thailand, Singapore, India, Saudi Arabia, Turkey, almost all EU countries
Logistics Management Solutions (LMS)	St. Louis, Missouri, US	\$600m (freight under management)	\$124m	US
Norbert Dentressangle	Saint Vallier sur Rhone Cedex, France	€300m	€2.84bn	Europe, North America, Asia
DAMCO	Copenhagen, Denmark	\$320m (11% of business)	\$3bn+	Europe, Asia, Middle East, Africa, North America, Latin America
De Rijke Group	Spijkensse, The Netherlands	around €215m, 80% of total sales	€430m (excl. Middle East)	With own equipment: Nordics, UK, Mid-Europe, Southern Europe, Eastern Europe (bulk liquids), Russia/Ukraine (bulk liquids). Globally through BU Logistics and its partners
ISC GLOBAL and ISC FAR EAST	Basel, Switzerland (Global HQ) and Singapore (Regional HQ for Asia Pacific)	around €105m, 50% of total sales	€210m	Europe, Asia Pacific, USA, Brazil
Jacobson Companies	Des Moines, Iowa, US	\$118m	\$737m	North America, Latin America, Europe, Africa, Asia, Middle East
Dupre Logistics	Lafayette, Louisiana, US	\$110.8m	\$124.1m	US
Group Gheys	Balen, Belgium	€30.5m	€35.8m	Benelux region, Germany, France, Denmark, Italy
J.B. Hunt Transport Services	Lowell, Arkansas, US	\$30m	\$3.79bn	North America
Baltransa	Ciudad Real, Spain	€20m	€20m	European Community, being France, Germany, Netherlands and Italy
USA Container	Piscataway, New Jersey, US	\$28m	\$28m	US
HW Coates	Cosby, Leicestershire, UK	approx £15m	£22m	UK
The Hazchem Network	Rugby, UK	£6m	£6m	UK, Ireland
Hessenatie Logistics	Antwerp, Belgium	€5m	€25m	Distribution sites in Boom, Kortrijk, Kampenhout, Antwerp
Cardinal Logistics Management	Concord, North Carolina, US	\$4.5m	\$274.1m	US
SeaWay Forwarding & Logistics	Thessaloniki, Greece	€2.5m	€2.8m	Greece and other Balkan countries (Bulgaria, Romania, Albania, Serbia, Vosnia, Croatia, etc.)

SOURCE: Companies, compiled by ICIS