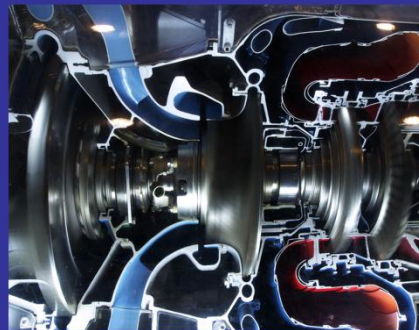


# 5<sup>th</sup> TRANS Middle East BAHRAIN 2009

Manama, Bahrain  
November 24, 2009



## *Creating Supply Chain Value Through Logistics Partnerships*

[www.bostonstrategies.com](http://www.bostonstrategies.com)

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# Increasing Margin through Value Added Services

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## Vessel-Related Services

- Bunkering
- Ship repair
- Stripping
- Stuffing
- Parking
- Parts
- Cleaning
- Safety & security

## Supply Chain Services

- Special Economic Zones
- Labs and Testing
- Storage
- Blending and refining
- Quality control/repacking
- Manufacturing
- Assembly
- IT Services



# Qatar Fuel / Shell Marine Products

- Logistics, technical and HSSE support to WOQOD
  - Bulk tanks, barges, and storage facilities at Ras Laffan
- Exclusive supplier of marine lubricants
  - To WOQOD in Qatar
  - To four LPG carriers owned and operated by Gulf LPG Transport, a Nakilat / Q-Ship JV



# PDO / Exel

- Knowledge and skill transfer
- Cultural transformation
- Information systems expertise
- \$300m 5-year agreement
- Transport of all PDO goods (pipes, equipment, food, water and crude diesel)



# UAE / RSA Logistics

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- Dubai Logistics City
- 25,000 sq m distribution center
- 21.5 sq km area
- 12 months
- Receiving, put-away, replenishment, packaging, re-packing
- Assembly
- Inspection & QC
- Picking, packing, labeling, shipping





# Bahrain / APM Terminals

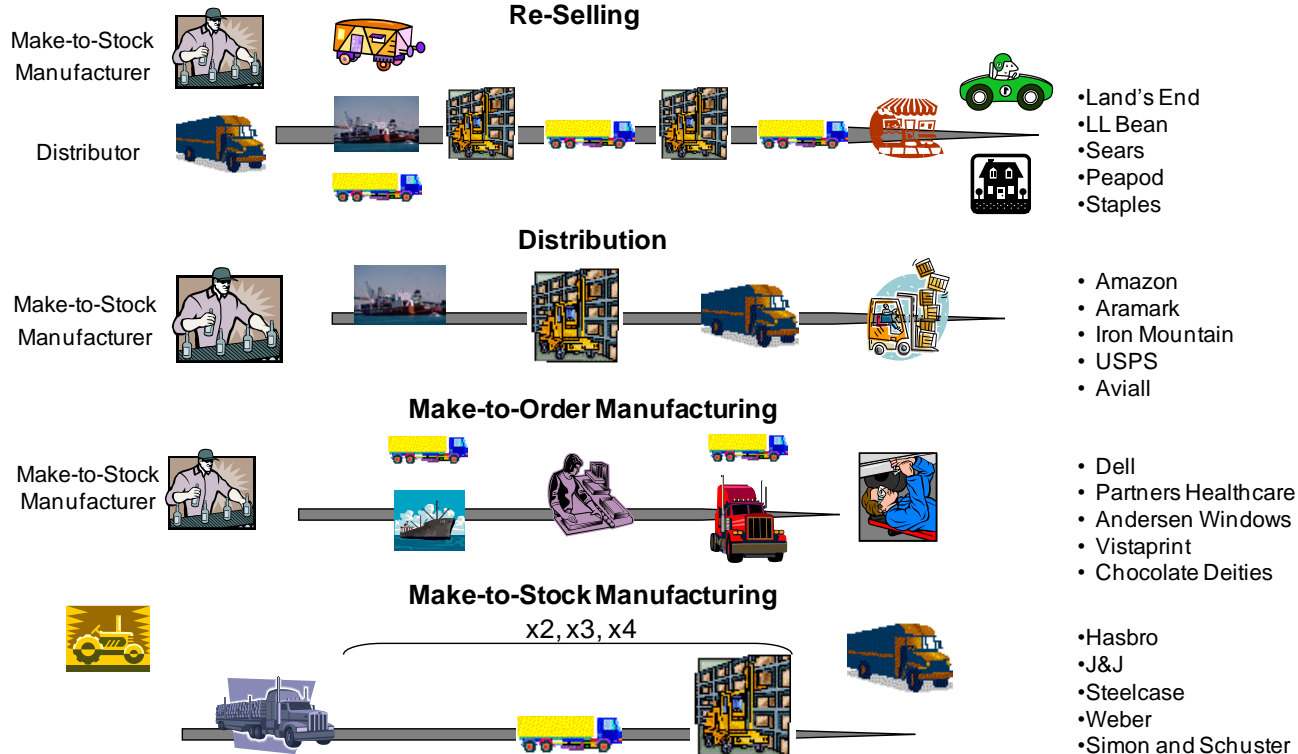
- Four post-Panamax cranes
- 1800 meters of quay wall
- 12.8 → 15 meter channel depth
- Bahrain Logistics Zone
- Gateway to Saudi Arabia, Northern Gulf
- Anchor tenants
- Infrastructure improvements



# Supply chain benefits driving economic growth

- 15-20% of transport costs=1-2% of operating costs
- Efficiency and profit gains=0.5-1.0% of GDP

## Supply Chain Types™



Source: Boston Strategies International

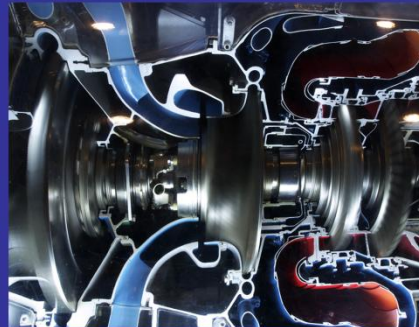


# Boston Strategies Links Shippers, Carriers, 3PLs

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**Boston Strategies International** is a global management consulting firm that helps market leaders achieve competitive advantage through supply chain management through:

- **Supply Chain Consulting** that helps supply chain leaders make high-stakes decisions
- **Cost Service** that helps plan and budget
- **Market Data** that helps identify emerging issues that affect their supply chains, and quantify the impact that they will have



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