
Thank you for taking the time to let me demonstrate GSCi.

The purpose of this brochure is to go through the features and benefits of each section of GSCi and help you to navigate the site.

If you have any questions or require an online training session, I have included my contact details at the end.

GSCi in summary

The Global Supply Chain intelligence (GSCi) portal is an online database offering a comprehensive analysis of the global logistics industry.

GSCi is comprised of six key sections:



Logistics Market profiles



Regional/ country profiles

010100
001011
010101

Technology



Vertical Sector profiles



Logistics service providers



Data Hub

GSCi also contains a number of secondary products that complement the key sections, namely the Ti Dashboard, the Global Logistics Monitor and the Top 10s.

Client list



GSCi is used by a range of customers and by personnel at all levels, from CEOs to researchers, to conduct research and inform decision making.



GSCi – Sign in



Each new user to GSCi will receive a welcome email with a link to create their password.

On setting a unique password simply click the Sign In button at the top right of the Homepage:



You will then be taken to the screen below:

A screenshot of the GSCi login page. At the top, the GSCi logo is displayed in a large, bold, dark grey font, with the 'i' in red. Below the logo is a white login form with a light grey border. The form contains two input fields: 'Email' and 'Password'. Below the password field is a checkbox labeled 'Remember me'. A blue button with the text 'Log in' is positioned below the form. Below the button is a link that says 'Forgot your password?'. At the bottom of the form, there is a small box containing the text 'Visit the [Introduction page](#) to learn how to subscribe.'

GSCi - Logistics market profiles



GSCi's logistics market profiles cover the markets for all major categories of logistics services including:

Logistics Markets

Transport & Logistics Markets (Overview)

Logistics Market Profiles

Cold Chain Logistics



Contract Logistics



e-commerce



Express and Parcels



Freight Forwarding



Road Transport



Warehousing & Property Development



Logistics Market Summaries

Air Freight



Airports

Intermodal Transport



Ports

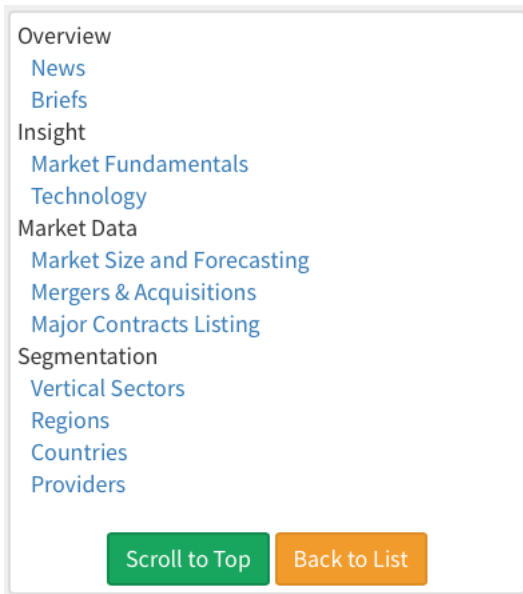
Sea Freight



GSCi – Logistics Market profiles: features



Each market profile contains the below sections:



- **Overview:** The overview section contains Ti's analysis of the major trends developing within the market and examines the structure and dynamics of the market in detail. It's here that you'll find information on supply and demand factors, cost structures, operational models and best practice.
- **Market Size and Forecasting:** This section provides Ti's proprietary market sizing and forecasting data, giving you hard data on the scale and expected growth of different markets. This data is split geographically and by the major segments of the market.
- **Mergers & Acquisitions, Major Contract Listing:** See all the M&A activity within the market and view listings of all major contracts between LSPs and shippers in the market.
- **Providers, Vertical Sectors, Regions and Countries:** Understand what different companies are doing in each market, how the market interacts with each vertical sector and the particular characteristics of the market in each country/region.
- **News and Briefs:** Read about all the latest developments in the market.

GSCi – Logistics Market profiles: benefits

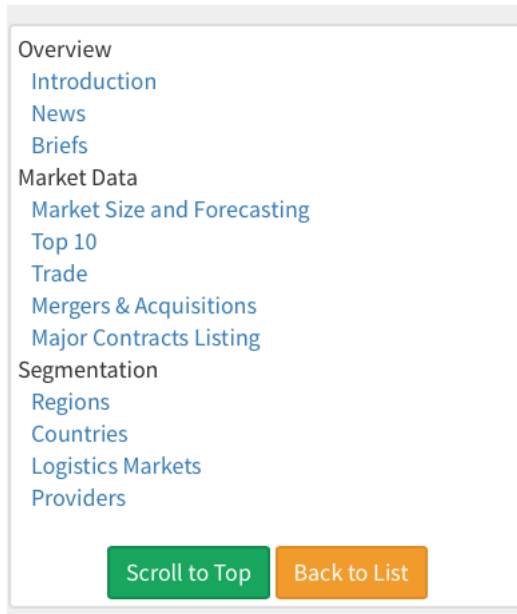
-
- **Overview:** Can be used to understand the factors that drive changes in prices, service levels, volumes and margins; how these are changing now and how they will develop in the future.
 - **Market Size and Forecasting:** Helps you to understand the market size and growth prospects of different logistics markets to allow you to make informed strategic investment decisions and conduct market entry studies.
 - **Technology:** Can be used to understand the impact of new technologies on the market and the competitive landscape of their use.
 - **Mergers & Acquisitions, Major Contract Listing:** Understand the structure of the market and which LSPs are providing which services to which shippers.
 - **News and Briefs:** Keep right up to date with the latest developments in the market.

GSCI – Vertical Sector Profiles



GSCI's vertical sector profiles cover macro-economic vertical sectors including:





- **Overview:** The overview section contains Ti's analysis of the structure of the market for logistics services to the sector and highlights the major trends which are influencing its development.
- **Logistics:** This section discusses the role that logistics plays within the sector, the type of services used by the sector and how LSPs serve the sector
- **Market Size and Forecasting:** This section provides Ti's proprietary market sizing and forecasting data, giving you hard data on the scale of the logistics services used by the sector and the expected growth in those services. This data is split geographically and by the major segments within the sector. You will also find production data relating to the sector here.
- **Trade:** This section contains import and export data for commodities within the sector, as well as more detailed data on trade flows by lane.
- **Mergers & Acquisitions, Major Contract Listing:** See all the M&A activity within the sector and view listings of all major contracts between LSPs and shippers in the sector.
- **Providers, Vertical Sectors, Regions and Countries:** Understand what different companies are doing in each sector, how the sector interacts with each logistics market and the particular characteristics of the sector in each country/region.
- **News and Briefs:** Read about all the latest developments in the market.

GSCi – Vertical Sector profiles: benefits

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- **Overview:** Helps you understand the nature and structure of different sector within the context of logistics
 - **Logistics:** This section discusses the role that logistics plays within the sector, the type of services used by the sector and how LSPs serve the sector
 - **Market Size and Forecasting:** Understand the potential growth of opportunities for logistics services to different sectors.
 - **Trade:** Helps you understand the scale and growth of volume flows of different commodities on different lanes and identify the best lanes to target.
 - **Major Contract Listing:** Understand which LSPs are working with which shippers in the sector.
 - **Providers, logistics markets, Regions and Countries:** Understand what different companies are doing in each sector, how the sector interacts with each logistics market and the particular characteristics of the sector in each country/region.
 - **News and Briefs:** Read about all the latest developments in logistics for the sector.

GSCi – Region and country profiles



GSCi's regional and country profiles cover every country of the globe with the top 100 economies profiled in detail. The regional and country pages are very similar in structure, the major difference is that regions focus more on the economic conditions and trading relations within the region.

Overview

[News](#)

[Briefs](#)

Insight

[Logistics Overview](#)

[Transport Infrastructure](#)

Market Data

[Top 10](#)

[Economic and Trade Data](#)

[Mergers & Acquisitions](#)

[Major Contracts Listing](#)

Segmentation

[Region](#)

[Vertical Sectors](#)

[Logistics Markets](#)

[Providers](#)

[Scroll to Top](#)

Logistics Overview: Designed to give you an understanding of the economic conditions within the country and its trade, before examining the country's competitiveness and assessing the sophistication and performance of its logistics sector. This section also provides a summary of the main logistics markets within the country.

Logistics Markets: Provides a detailed assessment of the characteristics, size and growth of each logistics market in the country.

Infrastructure: Describes the quality of infrastructure within the country and assesses the level of sophistication of logistics services that enables.

Providers: Explains the operations of each logistics company within the country

Benefits –

These profiles assist with market entry studies and planning for strategic development by giving full economic context for logistics in each country and then by providing granular detail on each individual logistics market in the country and detailing the competitive environment there with information on the companies operating there.

Afghanistan		Albania		Algeria		Angola	
Antigua And Barbuda		Argentina		Armenia		Australia	
Austria		Azerbaijan		Bahamas		Bahrain	
Bangladesh		Barbados		Belarus		Belgium	

GSCi – Logistics Provider profiles



GSCi provides profiles for the top 360 logistics companies operating in the global market. These LSPs range from the largest players with over €50bn of annual revenue down to companies with around €50m of annual revenue.

The companies are selected on a complex range of criteria to ensure that we provide coverage of all the most significant players from each logistics market, and which serve each geography and sector.

The full list of Providers can be manipulated by using the filters shown here:

Filters ▲

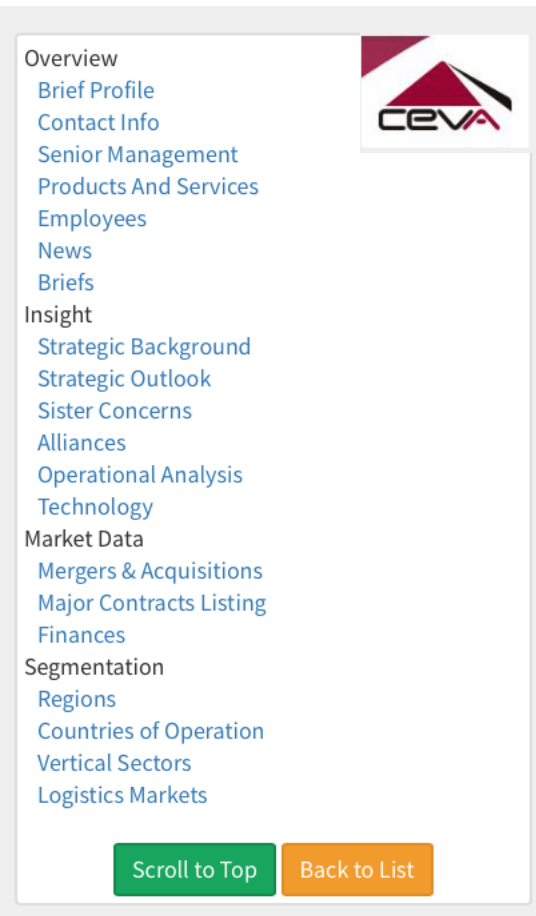
HQ location:	<input type="text" value="Select HQ Location"/>	Region of operations:	<input type="text" value="Select Region"/>
Industry:	<input type="text" value="Select Industry"/>	Country of operations:	<input type="text" value="Select Country"/>
Logistics Market:	<input type="text" value="Select Logistics Market"/>		

Or by using the Rank by Revenue facility shown here:

Convert to: Select Year:

Rank	Company Name	2014 (m) [€]	2015 (m) [€]	2016 (m) [€]
1	United States Postal Service (USPS)	59,439.43	60,401.61	62,593.23
2	Deutsche Post DHL Group	56,630.00	59,230.00	57,334.00
3	UPS	51,028.70	51,143.50	53,371.93
4	Maersk Line (AP Moller - Maersk Group)	23,590.87	20,514.18	17,890.54
5	Deutsche Post (Post - eCommerce - Parcel)	15,686.00	16,131.00	16,797.00

GSCi – Logistics Provider profiles: features



Overview

- Brief Profile
- Contact Info
- Senior Management
- Products And Services
- Employees
- News
- Briefs

Insight

- Strategic Background
- Strategic Outlook
- Sister Concerns
- Alliances
- Operational Analysis
- Technology

Market Data

- Mergers & Acquisitions
- Major Contracts Listing
- Finances

Segmentation

- Regions
- Countries of Operation
- Vertical Sectors
- Logistics Markets

[Scroll to Top](#) [Back to List](#)



Strategic Profile: Ti's Strategic Profiles offer in depth strategic analysis of each Provider, assessing their operational capabilities, their current strategy, their financial position and situating the company within the context of the wider market. This section also contains an executive summary of the whole profile.

Operational analysis: Provides detailed information about what services the company provides, where it provides them and how it performs those functions. Here you will find out all about the structure of the companies, their networks/fleets and their service offering. You can find further granular detail about a company's operations in given Logistics Markets, Vertical Sectors, Regions and countries in the corresponding subsections.

Technology: Provides detailed information on the software and hardware each company is using and how it feeds into their operations.

Finances: Provides detailed financial breakdowns on the company accompanied by in depth analysis assessing each company's performance and putting that into the context of the wider market.

GSCi – Logistics Provider profiles: benefits



GSCi's provider profiles offer detailed competitor intelligence to help you understand the capabilities and performance of all major LSPs. They can be used for benchmarking and to better understand your competitors to get an edge, to help you to select which logistics company to work with, or to give you a better understanding of an LSP you are intending to pitch to.

The image below demonstrates a SWOT analysis for XPO's contract logistics business available by going to:

Providers > XPO > Insight > Strategic Background

SWOT: Contract Logistics	
Strengths	Weaknesses
<ul style="list-style-type: none"> The company's executive management has a clear strategic vision for growth, based upon significant experience in conducting roll-up acquisitions. The dismissal of several prominent executive officers at the majority of XPO's major acquired companies ensured that the board is of united purpose, with little room for dissenters. The average length of contract for the company's logistics business is five years, contributing to a highly defensible set of revenue streams. The company possesses a highly diversified customer base; the single largest XPO client accounted for 1.4% of 2015 revenues. The company prides itself on its set of proprietary IT software solutions, and invested \$425m into this operation during 2016. Global footprint makes XPO attractive to large clients - 63% of Fortune 100 are customers. Low capex requirements as a proportion of revenue lead to strong free cash flow conversion and ROIC. 	<ul style="list-style-type: none"> XPO Logistics saw its share price fall substantially following the Con-Way acquisition (though it has since recovered to record highs) The company failed to produce an operating profit from 2011 to 2015, with the pursuit of top line growth the main priority. 2016 however was a profitable year. The company has a relatively weak presence in the Asia Pacific region and emerging markets generally, where competitors have been able to exploit significant growth opportunities. The sheer extent of customer verticals supported and business activities conducted by XPO Logistics suggests that the company may have difficulty in establishing synergies and providing consistently high levels of service across its range of offerings. The sale of its North American truckload/FTL operations leaves XPO without an asset-based presence in this segment, though the company says it will continue to serve customers through its brokerage network. The company has a relatively weak presence in global air and sea freight forwarding.
Opportunities	Threats
<ul style="list-style-type: none"> XPO Logistics has a senior management with years of experience in acquiring and consolidating companies, meaning that inorganic growth is an area of strength for the company. The company is targeting e-commerce as a key growth segment for the business. e-fulfilment revenues increased by 31% in 2014 and the company noted that its segments most exposed to e-commerce grew particularly well in 2016. Consolidation of the various acquired business is projected to create significant cost savings and synergistic effects for XPO in the immediate future, raising profitability. The company has not established yet established a presence in the healthcare vertical, an area of outsourcing growth that may represent an attractive target for future expansion. 	<ul style="list-style-type: none"> XPO Logistics is carrying a lot of debt, though 89% of its debt does not mature until 2021 or later, and all its debt is covenant-light. It is within its long-term leverage target of three to four times net debt over adjusted EBIDTA. The scale and speed of growth in the business may risk damaging organisational cohesion. Cultural differences could prove an inhibiting factor in the coordination of XPO's US and European entities. The sale of its North American truckload/FTL operations leaves the company less well positioned to capitalise on US-Mexico cross-border growth. In February 2016, when XPO intended to retain the business, the company stated that shippers placed value on owned truckload capacity particularly in these lanes.



GSCi – Technology: Features



The Technology section provides analysis of software vendors and their solutions for the logistics industry through profiles of major players. This section also provides overviews of major technology classes and the market for different types of software solutions.



Software Vendor Profiles: Provide detailed analysis of major vendors of software to the logistics industry, examining their operating models, the type of services they provide, how they provide them, and how that feeds into their financial performance. The profiles also give details of each company's capabilities in different fields of technology e.g. cloud computing, AI, big data etc.

Software vendor Summaries: Provide an overview of smaller software vendors and start-up companies along with their solutions

GSCi – Technology: Benefits

- Understand each organisation's competitive position and future outlook, mapping the competitive landscape.
- Get insight into how software vendors are leveraging new technologies to enhance the logistics operations of their clients, along with the implications for the wider market so you can understand which software providers are likely to be a good fit for your business.

The below example displays part of the Strategic Profile of Oracle, which can be accessed through Technology > Software Vendor Profiles > Oracle > Strategic Profile

Strategic Profile



24/07/2017



A vast empire of software solutions, with enormous resources, and challenges to match. Faces a complex and lengthy transition to adapt to the new realities of enterprise software.

Oracle Corporation has its origins in relational database management systems (RDBMS), where it has consistently ranked as the leading company in the sector, following successive threats. Though the company has been highly successful in developing its own software products, it has also used acquisitions to maintain its position, either buying to strengthen its position in a given market, or to directly eliminate threatening competitors.

Oracle has fought a long-term battle against threats from open-source software, which has constituted a severe threat to its business at several junctures; the company's landmark acquisition of Sun Microsystems, which created the Java programming language, was partially motivated by Oracle's perception that Sun constituted a potentially existential threat.

A salient development in databases is the rise of non-relational systems, which have grown in popularity as a result of big data. Non-relational databases are far more flexible than relational database management systems (RDBMS), as the data they store is unstructured. This offers far greater potential to edit than in the case of RDBMS's, in which the categories of data being stored are predetermined. Furthermore, unlike relational databases, non-relational databases are designed to scale out, making them well-suited to cloud computing.

The rise of this form of database is a tricky issue for Oracle to navigate, as its area of strength is in RDBMS. With the inevitable rise of big data, and the consequent adoption of non-relational databases to manage it, the company will have to adapt once more. The company has approached the issue with a mixed approach, bolstering its existing competences with new non-relational database systems.

The company's strategy in this area is predicated on an assumption that RDBMS will continue to form an important part of the IT ecosystem going forward, and that by developing an approach that integrates relational and non-relational systems, it can hedge its bets. Recognising that the parallel uptake of structured and non-structured systems would lead to functional siloes within businesses, Oracle launched Big Data SQL in 2014. Oracle Big Data SQL represents an important service because it allows customers to query data from Hadoop, NoSQL and SQL databases using traditional SQL syntax.

With regards to supply chain management software, Oracle is one of the three leading supply providers along with SAP and JDA; the trio having a much broader scope of products than others competing in the space.

GSCi – Data Hub



The Data Hub provides easy access to Ti's extensive collection of charts and tables including full access to the Mergers & Acquisitions and Major Contracts databases.

Data Hub

Rank by Revenue



Top 10s



Mergers & Acquisitions



Major Contracts



TI Dashboard



GSCI – Data Hub: Ti Dashboard



The Ti Dashboard is a data aggregating and visualization tool designed to provide a live feed of data that Ti considers to be indicators of development within the logistics industry. There are 128 different indicators in total, each designed to demonstrate and measure a particular trend or pattern so that you can understand the very latest developments in the market at weekly or monthly intervals.











These indicators are split into 11 main sections:

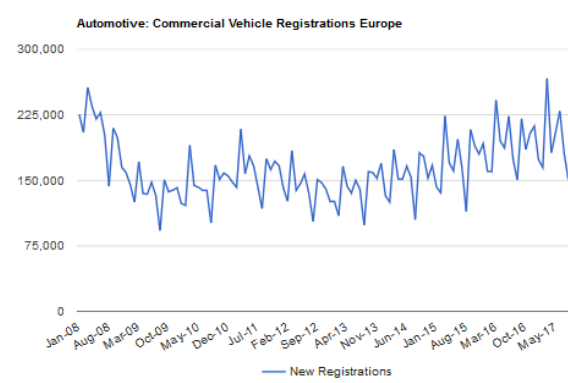
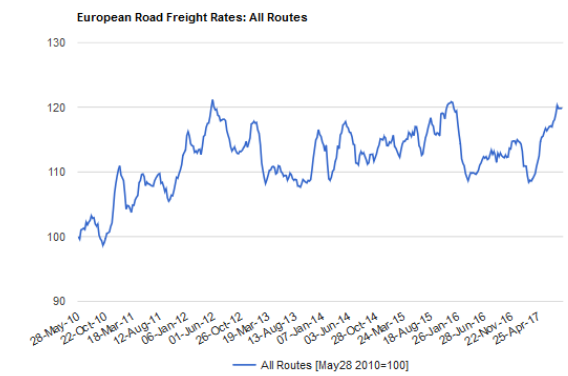
- **Logistics Providers:** Financial and volume data comparing the performance of major LSPs
- **Market size:** Market growth rate data for the freight forwarding, contract logistics and express markets
- **Macroeconomic Indicators:** Macroeconomic and trade data plotting the health of the global economy
- **Trade:** Global and regional export and import time series data and charts
- **Fuel Prices:** Charts and time series data related to oil and fuel prices
- **Industry Vertical Sectors:** A range of industry specific data and charts related to key sectors including chemical, automotive, high tech and retail
- **Sea Freight:** Global and regional container shipping data including volumes and rates
- **Air Cargo:** Global and regional (including Asia Pacific, Europe and US) air cargo data
- **Overland:** Road and rail freight data from Europe, North America and China including output levels and rates
- **Warehousing:** Warehousing rents data
- **European Road Freight Rates:** Weekly road freight rates on key European road traffic lanes

GSCi – Data Hub: Ti Dashboard



Below you can see a few examples from the Overland section of the Ti Dashboard. On the left you can see the subsection with 10 of the 19 Overland transport metrics shown, the graphs on the right show you two key measures of the road freight market in closer detail. Each graph is also accompanied by some analysis of the trend and all the data which can be exported to excel for use in your own analysis.

<p>European Road Freight: Capacity Index</p>  <p>Tracks the capacity index, produced by Transporeon and Caggemini Consulting, that measures the di...</p>	<p>Freight Forwarding Index: Europe (by mode)</p>  <p>Shows Danske Bank Market's European Freight Forwarding Index, broken down by transport mode, whic...</p>
<p>Freight Forwarding Index: Europe</p>  <p>Shows Danske Bank Market's European Freight Forwarding Index, which measures monthly freight volu...</p>	<p>Good Vehicles: Great Britain to Mainland Europe</p>  <p>Measures the quarterly number of road goods vehicles travelling to mainland Europe from Great Bri...</p>
<p>Price Index: Freight Transport by Road</p>  <p>An index showing quarterly road freight rate increases across Europe. After falling considerab...</p>	<p>Producer Price Index: German Transport and Logistics</p>  <p>An index showing quarterly changes in logistics costs in Germany. For rail freight in Germany,...</p>
<p>Road Freight Rates: Europe</p>  <p>Uses Transporeon's Transport Market Monitor to measure monthly road freight rate changes in an in...</p>	<p>Service Producer Price Index: UK</p>  <p>Shows quarterly estimates of price changes for services provided by UK businesses to other UK bus...</p>
<p>US Road Freight: Capacity - DAT Van Load-to-Truck Ratio</p>  <p>Shows the DAT Solutions measure of the monthly load-to-truck ratio (the number of loads posted fo...</p>	<p>US and Canada: Rail Intermodal</p>  <p>Measures the monthly number of trailers/containerloads transported on an intermodal basis in the ...</p>

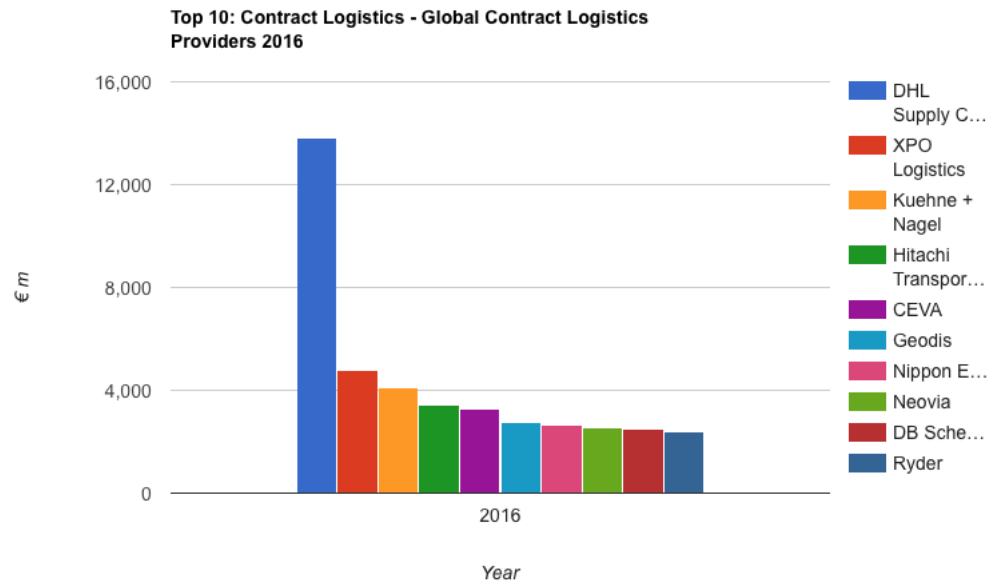


GSCi – Data Hub: Top 10s rankings



The Top 10s is a list of rankings for the global logistics industry to help you find out the largest logistics players are in different countries, logistics markets and sectors. You can also find rankings of the top tradelanes (import/export) by commodity and see rankings of ports and airports by volume. There are also rankings of the largest manufacturers within different sectors.

This information can be used for comparisons, for benchmarking and for identifying potential customers.



GSCi – Publications



Ti's Whitepapers, Logistics Monitors and Presentations are available to all GSCi subscribers and can be accessed through the Publications box.

Ti Market Reports are available to Global subscribers or can be added to single user or group subscription packages.

Publications



GSCi – Scope of licence



User rights:

Each GSCi user has their own user account and is part of an overall subscription held by the user's organization. Each user may be part of a larger user group if their organization has a group GSCi licence type (as set out in the pricing structure above).

Under any licence each individual user may personally access GSCi on any device at any time from any location around the world. Users may only access GSCi on one device at a time.

Users may download reasonable portions of GSCi for use in their work. The user may also quote reasonable portions of GSCi in reports and presentations for clients and/or colleagues as long as Ti is accredited.

What next?



Summary:

GSCi saves you time and money

GSCi provides the data and analysis to help you make informed business decisions

The platform is updated daily by a team of dedicated researchers and analysts

GSCi is the only online logistics research provider which allows users to manipulate unique data and analysis dedicated to the industry

Find out why over 95% of customers keep coming back to GSCi – it could transform your business today



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About Ti



Ti is a market leading research specialist which offers high quality innovative solutions to companies operating within the global supply chain. Ti solutions are delivered through subscription to our online knowledge centre, off the shelf reports, bespoke consultancy and partnership programmes. We value our longstanding relationships and delivered outstanding customer service to achieve 90% repeat business in 2016.

What do we do?

Ti Product Portfolio / 1 of 2



GSCi Portal

The GSCi portal is an online centre offering the ultimate insight into the logistics industry featuring analysis of LSPs, markets, sectors, countries and regions.

- An easy to use tool that can conduct quick fact finding missions
- Updated daily and equipped with the latest navigation and interactive tools
- Cost effective, allowing you full access to Ti's invaluable analysis



Consulting

Ti Consulting offers bespoke research and analysis tailored to specific company requirements. Ti's network of global consultants has operational experience in all aspects of the supply chain.

- Expert, actionable analysis delivered against strategic, tactical and operational objectives
- Ti's expertise in gathering primary data on the logistics industry sets our research apart and means that our analysis is formed from a position of deep understanding



Partnership Programmes

Ti Partnership Programmes offer companies the opportunity to position themselves as knowledge providers and gain global exposure.

- Industry accredited experts provide commentary to support survey findings or overviews that add validity to the client's service.
- Promotion via Ti's extensive network of senior level global subscribers and followers

What do we do?

Ti Product Portfolio / 2 of 2



Ti Reports

Each report is a leading source of research and analysis across the global transport and logistics markets.

- Assess how to improve your business model against overall market conditions and competitors
- Identify critical risks to your business as well as opportunities to develop new products and services

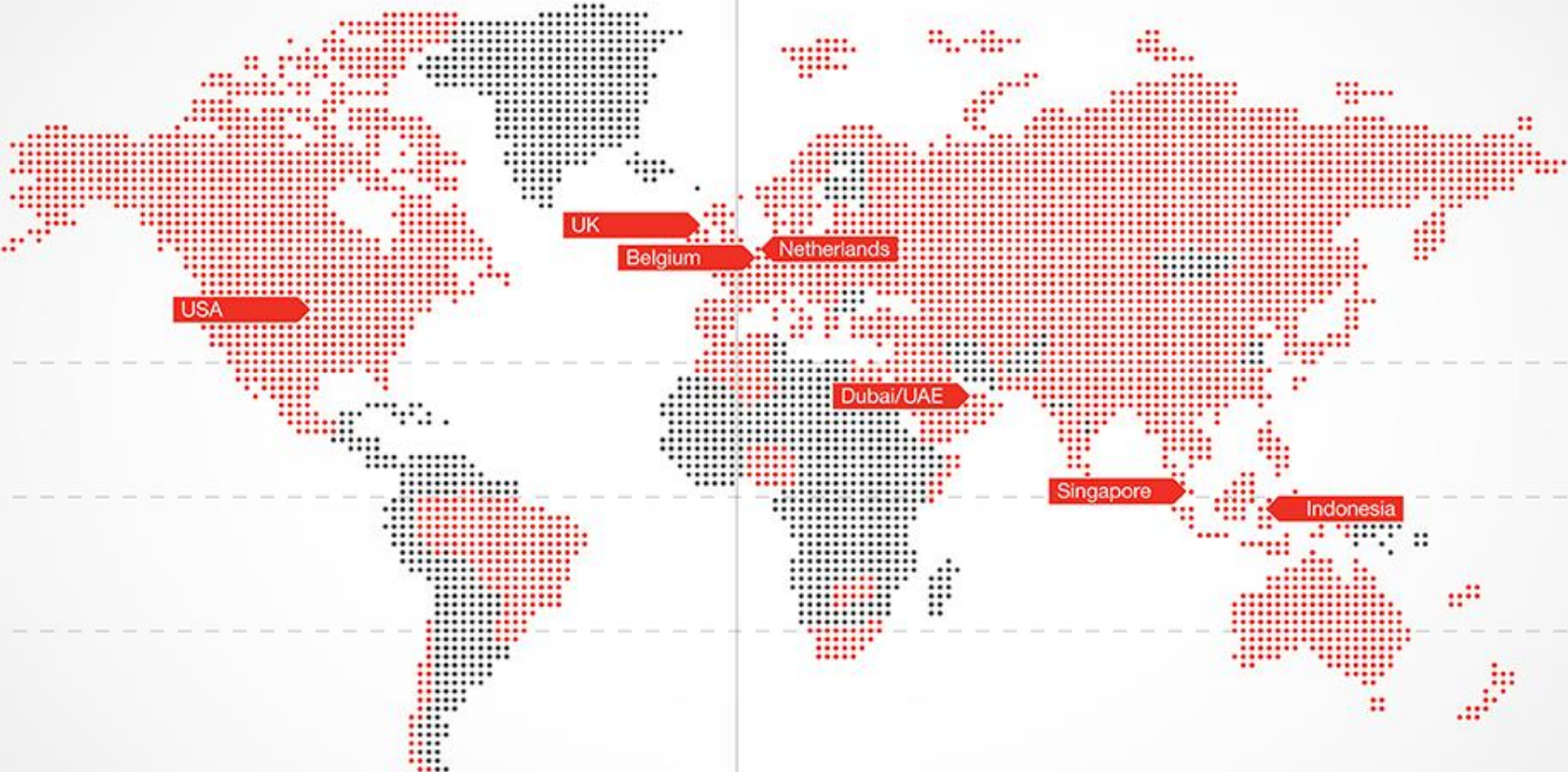


Logistics Briefing

An executive news and briefs service that provides high level analysis of events and developments across the logistics industry.

- Delivers immediate reports on breaking industry news
- Written by a team of expert analysts and dedicated journalists
- Commentary and insight into major industry events enabling subscribers to make the right business decisions

Where we work



Who we are



John Manners-Bell

Ti's Chief Executive, has over twenty years experience in the global logistics industry with both operators and consultancies. Established by John in 2002, Ti has now become the leading provider of market research solutions to the global logistics industry.

email: jmannersbell@ti-insight.com



Sarah Smith

Managing Director, has overall responsibility for the future growth and success of Ti. Sarah joined Ti in 2006 and has been integral to its development over the last 10 years.

email: ssmith@ti-insight.com



Joel Ray

Head of Consultancy, has had a career dedicated to strategic consultancy and corporate development within the industry including a period as strategic manager with a European post office. Joel joined Ti in 2002 to head up its bespoke research and consultancy division.

email: jray@ti-insight.com