GSCLG

November 2009

GLOBAL SUPPLY CHAIN REVIEW

Published by the Global Supply Chain Leaders Group
www.gscreview.com

LEADER PROFILE:
INTERVIEW WITH
MICHAEL A. MASSETTI

MBA CONSULTING:
IT CAN BENEFIT
YOUR BUSINESS

SPECIAL ECONOMIC REVIEW:
GLOBAL FORECAST

PLUS:
GSCLG LAUNCHES
THE GLOBAL SHIPPER
CONSORTIUM

Michael A. Massetti
Advanced Micro Devices
Incorporated

Message from the President of GSCLG

As President of the GSCLG, I am delighted to present this special edition of the Global Supply Chain Review. This month, the GSC Review showcases the second of a series of icons in the world of Supply Chain.

We have aligned the most influential, accomplished, and renowned executives from some of the better known corporations worldwide. As I've said in the past, we seek those individuals who have made the most significant contributions to the advancement of the supply chain industry at the same time helping their companies' bottom lines. In other words, these are the individuals that will inspire both veterans and new hires in supply chain. These are the type of professionals most people would like to be when they reach their professional goals.

We are extremely pleased to be able to present this time an interview with Michael A. Massetti, Vice President, Supply Chain, of AMD, Inc. Michael has a superb set of skills ranging from global supply planning, inventory management and control, order management, fulfillment, and supply chain management to global procurement and quality. His leadership skills are exercised not only on the job, but also in his contributions to being green both individually and at AMD.

Michael has had a superb career at a senior level at companies such as IBM, Tekelec, Lucent Technologies, Dell Computers and at present, AMD. These companies have provided him the challenges and opportunities to make him one of the better known icons in our industry and a champion of green supply chains. His accomplishments deserve recognition. Most recently, Michael was a recipient of the 2009 Top 25 Supply Chain Executives Award from the Global Supply Chain Leaders Group.

We are excited to give you the second of many important supply chain interviews. We will do our best to keep searching globally for those leaders that deserve to be singled out. I ask you to send me the names of those you would like to be profiled so we can learn from their views and accomplishments. We've already received a few names after publication of our October edition and we have a great lineup of individuals coming in the next few months.

We celebrate supply chain leaders with vision, passion, and care for their customers and employees. These leaders provide the value shareholders' deserve; they ensure that their customers keep moving forward while dealing with global challenges affecting the day-to-day operations.

As we said in every edition, if we recognize great performance and leadership potential, we will promote our capacity to lead both operationally as well as at the C-level. As senior-level supply chain leaders, the senior executives featured in our magazine should be recognized by their peers and by the industry. We hope to see them growing and becoming the future CEOs that we all deserve and admire.

We are honored to present Michael A. Massetti, Vice President, Supply Chain, of AMD Systems, Inc. and look forward to honoring many more like him in the future.

Sergio Retamal

Publisher, GSC Review
www.gscreview.com
President, GSCLG
www.gsclg.com

Complete Global Supply Chain Visibility...
in just one system
✔ Part Numbers Status
✔ Purchase Order
✔ Shipment Status
✔ Customs Clearances
✔ Freight Charges
✔ Document Management
✔ Reporting
Suppliers
CMs
Vendors
3PLs
Carriers
Forwarders
Customs Brokers
4PLs
8:17 AM
Login
Search
MAWB/BL #
HAWB/HBL #
Container #
Entry #
PO #
Vendor Name
Item #
Origin
Destination
New! Get POHorizon™
On Your iPhone!
POHorizon™
POHorizon™
For more information, please visit our web site:
www.pohorizon.com

The Third Annual Global Supply Chain Leaders Group Conference

Reserve the date for the next Global Supply Chain Leaders Group Gathering!

October 21, 2010 in San Jose, California 7 AM - 9 PM

The SCM's Path to CEO

Senior Executives Only

If you attended the GSCLG's 2009 annual dinner, then you already know what a truly unique and valuable networking opportunity that was for a senior Supply Chain executive like yourself. Our next event promises to be bigger and better so mark your calendars. Details will follow in the months leading up to this event.

This conference is reserved for senior Supply Chain executives of non-service provider corporations only. This is a truly unique networking opportunity for senior executives at their level or higher. The GSCLG will make seats available to only five **Platinum** sponsors and five **Gold** sponsors.

Click Here To Register

Contact: andrea.kostelas@gsclg.com for sponsorship information.

GSCLG Supply Knowledge™ A Global Community of Practice

Interview with Michael A. Massetti, Advanced Micro Devices, Incorporated

Michael A. Massetti joined AMD as Vice President, Supply Chain in December, 2008. Michael is responsible for global supply planning, inventory management and control, order management, fulfillment, and the supply chain management infrastructure program.

Michael came to AMD from Tekelec where he was Vice President, Global Procurement & Quality since August 2006. In that role, Michael led a centralized global team covering all spend categories and managed all contract manufacturing, OEM hardware, and software. He drove the transformation of procurement from transactional-based to an advanced sourcing function – achieving double digit cost reduction, delivery performance, and quality improvements, while reducing cost of poor quality by >50%.

Michael came to Tekelec from Lucent where he was Senior Director, Supplier Management - Platform Strategy & Sourcing. In this role, he managed over $1.5B of hardware spend, drove $100M per year in cost reduction programs, and directed sourcing strategy development for Lucent's embedded technologies. He joined Lucent in March 2002.

Michael came to Lucent from Dell where he was Director of Program Management for the OptiPlex product line. Michael led the introduction of 10 desktop platforms for a product unit that contributed over 55% of Dell's revenue.

Michael began his career in 1979 at IBM's Microelectronics Division where he started in mixed signal integrated circuit development. He built IBM's first field applications organization in 1993 as IBM entered the merchant semiconductor market. Michael's final position with IBM was Senior Program Manager for the PowerPC product line.

Michael received his BSEE from The University of Notre Dame in 1979. He received his MSEE (1984) and MBA (1987) from the University of Vermont. Michael completed NTL's Mastering Executive Leadership, GAP leadership training at Lucent, Dell's Executive Leadership Program, and Strategic Marketing at the University of Michigan. Michael has been a guest lecturer at the University of Texas (Program Management) and Rutgers University (Supplier Relationship Management) and has spoken at several conferences on supply chain topics.

Michael received the 2009 Top 25 Supply Chain Executives Award by the Global Supply Chain Leaders Group.

How important is Supply Chain Management to AMD's overall business strategy?

AMD serves a global marketplace including computer and electronic gaming manufacturers, distributors, and retail channel partners. Each of them may have unique requirements on the supply chain, but all require high levels of service. Excellence in SCM is essential to AMD's long-term success - the ability to consistently and reliably deliver our products to customers is required for AMD to continue winning new market opportunities.

What primary areas of focus (or key initiatives) is AMD looking at for Supply Chain Management?

AMD continues on our strategic transformation of the supply chain to higher levels of customer service, reduced levels of inventory, more flexible manufacturing, and globalization. Developing a competitive edge with a world-class supply chain is essential to continue driving customer satisfaction.

How has outsourcing enabled AMD to be successful with these initiatives?

Earlier in 2009, AMD completed a strategic transaction which resulted in the creation of a global semiconductor foundry for microprocessor wafer fabrication, GLOBALFOUNDRIES. This move was a significant step in transforming AMD's business to create a more agile operating model. With GLOBALFOUNDRIES, AMD gains a leading-edge microprocessor foundry partner and expands our manufacturing capabilities by scaling the size, capability and technology development of the manufacturing operations we are able to tap into. We also partner with foundry partners TSMC, Chartered and UMC. Our Assembly, Test, Mark and Pack operations are primarily done in-house. The balance of internal and external manufacturing helps reduce supply risk and increases overall supply chain flexibility.

How is AMD addressing the market's increasing focus on 'green' supply chains and reducing a company's carbon footprint?

AMD in August published its ninth annual Global Climate Protection Plan, which presents our strategy, goals, and commitment to continually reduce greenhouse gas emissions and contribute to global climate protection efforts. This effort spans our products, operations, and collaborative initiatives with our industry, suppliers, customers, government partners, and employees. Our strategy, quite simply, is to make energy conscious, smart choices in our operations and to leverage the collaborative bond with our customer and technology partners, positively impacting our products and supply chain. After achieving previously set climate protection goals, we set new goals in our recently released plan and are committed to continuous improvement. The interdependency of the impact of climate on supply chain is expected to present both challenges to and opportunities for progress for years to come.

What do you think the key Supply Chain Management priority for the coming 2-3 years is for AMD?

AMD must continue to drive supply chain improvements to ensure excellent delivery performance, responsiveness and agility, and, most of all, total customer satisfaction. We want customers to know they can rely on AMD to work with our supply chain partners to develop, deliver, and support world-class technology solutions.

What do you think the key Supply Chain Management priority for the coming 5-10 years is for AMD?

AMD's long-term strategies and focus are similar to our priorities for the shorter horizon: cost competitiveness, responsiveness and flexibility, supply risk reduction, and agility. As our customers' markets change and evolve, we need to have a supply chain that anticipates and supports the dynamics in the markets.

What are the biggest INTERNAL challenges for manufacturers to achieve supply chain excellence?

I like to say that supply chains are the most visible when they are terribly unpopular. It is easy for a supply chain to be noticed when deliveries are poor, when costs are out of control, when there is little flexibility, and when it is not responsive. Establishing and maintaining organizational credibility through excellent performance on all of the attributes we discussed earlier are critical. Our internal stakeholders cannot worry that the supply chain will not be able to support the customers once they decide to buy, or buy more, from AMD.

What are the biggest EXTERNAL challenges in achieving supply chain excellence?

Similar to the internal focus, it is absolutely critical that customers have total confidence in their decision to buy from AMD. We run a very high volume supply chain that produces tens of millions of parts a year. To be considered excellent means that we have highly integrated processes with all of our suppliers and manufacturing partners. This includes forecasting, inventory management and visibility, high quality execution, and a focus on customer service.

What are the supply chain challenges to which AMD should be paying more attention?

AMD is focusing on supply chain priorities as mentioned above.

Who is responsible for planning your company's business continuity when facing natural disasters, major disruptions or other geopolitical issues?

AMD's global supply management team, the supply chain planning team, and corporate financial planning all work to ensure we follow our business continuity plan during supply disruptions.

What are the main skills and personal attributes that have helped you reach your current position?

Supply chain management is a very broad field. It encompasses managing suppliers, logistics, planning, total cost of management, systems and tools, inventory planning and management, and considerable interaction with people, internal and external to the company. The breadth of my cross-functional experience first enabled me to enter SCM. Since then, my technical skills, business experience, communications, and interpersonal skills have allowed me to succeed.

How do you grade AMD's supply chain overall performance in client satisfaction?

The best measure of client satisfaction, of course, is our customer's repeated business with AMD. Additionally, AMD invites customer feedback quarterly, and we have received very good feedback on many of the elements we discussed earlier. I believe we still need to make progress to meet our internal expectations, which we hope exceed our customers' needs. The recent market collapse and up-turn has been a challenge and we are working closely with our customers to respond as their demands increase again.

During this economic downturn, how do you keep your entire organization motivated?

The one thing about being in supply chain is that you can clearly see your impact on the business. We set aggressive performance and improvement targets to start 2009 and have made solid progress through the year. With our key performance indicators and overall supply chain metrics, we've shown the team the progress they've made. It's all about instilling confidence in the team, keeping the challenges real and achievable, and stopping to appreciate the accomplishments along the way and thanking them for the efforts.

Who do you rely on for advice?

I have worked hard to establish and nurture a network of former colleagues and professional associates through professional networking venues like LinkedIn. I share questions and challenges with the people who I have worked closely with and whose opinions and experience I value. Of course, my boss, John Docherty, is the visionary behind AMD's supply chain and operations strategy, and he has plenty of advice for me.

What have you learned as Vice President, Supply Chain that has surprised you or changed the way you do business?

Probably the biggest positive surprise for me is how committed and dedicated my colleagues at AMD are. I'm proud to be part of a team that understands the challenges and comes to work each and every day driving to make us better. I have focused heavily this year on supporting the team. I am very pleased with how we've stuck together through the market turmoil.

Turbulent times should be the best time to implement changes. However, companies tend to paralyze due to uncertainty in the market or their human capital. What is your advice to maximize the opportunities to implement changes during tough times?

You must have a long-term strategy and plans, constantly review those, but most importantly, do not stray too far from the vision of the Company. Albeit, you may have to make course corrections along the way like slowing down SC technology investments, changing priorities and schedules, moving faster to out-source or in-source, and so on. To me, one of the most important elements is the focus on the people in the organization and ensure they fully comprehend the plan and the changes that you are driving. They need to see, hear, and feel the commitment of the SC leaders to help deal with turbulence and know they are on a path to success.

The Global Supply Chain Leaders Group (GSCLG) has launched the Global Shippers Consortium, which enables its members an opportunity to achieve significant cost reductions on global supply chain expenditures.

If a company is already a member of the GSCLG, membership to the Global Shippers Consortium is automatic. There is no cost to become a member of Global Shippers Consortium. A company will enjoy the benefits of the Consortium's negotiations and it may choose to participate, or opt out, at any time.

About Global Shippers Consortium

Global Shippers Consortium offers small, mid-size, and large businesses a significant opportunity to negotiate transportation rates by combining the membership volume and spend. The additional purchasing power will reduce costs in key expense categories such as international and domestic transportation and corporate travel expenditure. Global Shippers Consortium successfully combines the buying volume from companies into a single, multi-million dollar purchasing group. This considerable buying power enables Global Shippers Consortium to negotiate large-volume pricing contracts, as well as increased service levels for member companies through their expert content and negotiation consultants.

The contract pricing is based on a multimillion dollar aggregate volume, which assures discount levels virtually impossible to obtain by an individual company. However, each Consortium member is free to use its other service providers.

Strict confidentiality is maintained because the Consortium does not share individual members' pricing information.

The Benefits of Group Purchasing

Members benefit not only by receiving significant discounts. Through a selection of personalized services and tools, members receive unmatched savings of both money and time. Each member will gain the following benefits:

- Up to 75% cost reduction on transportation spend by utilizing the Consortium's expert negotiation personnel
- No minimum purchase requirements
- Effective streamlining of company purchases

The Power of Group Purchasing - Strength in Numbers. Join us and save.

Contact: andrea.kostelas@gsclg.com before December 31st for a chance to save substantially.

GSCLG

MBA Consulting: A primer on graduate student consulting and how it can benefit your business

By Doreen Shanahan

There is a highly valuable source for business consulting that is tapped by a limited group of "in the know" company executives: MBA consulting programs. In these programs, full and part-time MBA students from nearby universities work with businesses on real issues at little or no cost. In today's tight economy, it is no wonder that MBA consulting programs have gained significant popularity among small and large businesses.

In fact, the Association to Advance Collegiate Schools of Business, the governing body of graduate business schools, estimates the number of MBA consulting programs is more than 100 out of roughly 900 U.S. graduate business schools.

Pepperdine University's Graziadio School of Business and Management has offered an MBA consulting program since 2003. The Education to Business (E2B) program brings executives and students together to solve real business issues. Faculty work directly with partner companies to identify strategic problems or opportunities confronting the organization and that can be developed into business school case consulting projects. Pepperdine MBA students have completed more than 150 projects for corporate giants like The Coca-Cola Company, The Walt Disney Company and Cisco Systems as well as countless mid-sized and small businesses across a wide range of industries.

How exactly does Pepperdine's E2B work? In the E2B program, company projects are screened, selected and scoped to align with milestones in a 13-week course. Each company project is then assigned to an individual class, which is broken into competing teams of MBA candidates. In and outside of class, MBAs research, analyze and provide recommendations for a partner company's specific business issue. At the end of the trimester, teams present a comprehensive report-both oral and written-to Partner Company executives.

Issues tackled range from new product development/introduction, product life-cycle management, change management and organizational effectiveness, assessing a firm's financial performance, driving innovation through technology, IT enabling processes and information silos, to business and consumer marketing analysis, branding, forecasting demand and competitive positioning.

The benefit is multi-fold: businesses that don't want-or simply can't afford-to spend the money on high-priced consulting firms can still get professional-grade advice.

Such programs are opening doors to businesses with opportunities and talent that they might not otherwise be able to access. MBA consulting programs offer bright minds, fresh insights and solutions - with little to lose and tangible results to gain.

What types of business challenges are appropriate for an MBA consulting program? E2B projects have touched virtually every industry, from small automotive operations to Fortune 500 companies, pharmaceuticals and technology firms. Some examples:

Linksys Division of Cisco Systems

Students recently completed a project with the Linksys Division of Cisco Systems on the launch of a new consumer technology product. Students analyzed the consumer market (demographics, psychographics, behaviors, needs) and the competitive landscape to define the best positioning for the product, followed by development of marketing mix recommendations.

Continued

Shelly Automotive Group-Spectrum Collision Division

For Los Angeles-based Shelly Automotive Group, Spectrum Collision Division, students analyzed the business and its performance in all discipline areas. The comprehensive approach identified opportunities for improvement and offered concrete actions that successfully impacted the business' bottom line.

Coca-Cola Company

For the Venturing and Emerging Brands Division of The Coca-Cola Company, students researched new and emerging beverage brands, identifying potential acquisitions, and also developed a business case to support recommendations based on company criteria.

Instant Software, Inc.

In a case for Instant Software, Inc. that had almost immediate positive results, students developed a process to increase and accelerate the company's innovation pipeline, ultimately bringing the most profitable product concepts, enhancements and improvements to market in less than eight weeks.

Pepperdine Graziadio students have also worked with Microfabrica, Inc. on marketing plans for commercializing a patented new drug delivery system; and Security Base, in which students defined multi-functional recommendations for scaling the business.

However, it is important to note that a student consulting service - or any consulting service for that matter - may not be appropriate for all businesses. A business that participates in such a program has to be facing an appropriate business opportunity, challenge or problem that is ready for high-level analysis. However, once a business decides to seek solutions, an MBA consulting program may be the educated choice.

Is an MBA student-consulting program right for your business? We've identified a checklist of essential questions and requirements when seeking out an MBA program to work on a business project for your organization (please see table on the following page).

MBA CONSULTING CHECKLIST

A. Program Structure

1. How is the project positioned within the curriculum? For example, is it embedded in a class or part of a stand-alone class?
2. How many students will be assigned to the project? Is it an entire class in a case competition format, a team of students, an individual student, students from varying backgrounds or experience or students from similar backgrounds and experience?
3. How are students assigned to the project? Through class registration, company selection or student application?

For Pepperdine's E2B, the program structure is embedded both in a course and as a stand-alone class, both of which require registration, with the entire class being assigned to a project. Students from varying backgrounds and experience then form four to five teams to work on the project

B. Project Scope

1. What types of projects does the MBA consulting program accept? These may range from discipline specific – marketing, information systems, finance, etc. - to multi-discipline.

Pepperdine's Graziadio School currently works with both discipline-specific and multi-discipline projects.

C. Project Duration

1. What is the length of the engagement that the MBA program offers? Does it fulfill your requirements? Most programs typically range from seven to 20 weeks.

D. Participation Requirements

1. What are the specific participation requirements?
2. Is there a required size of the prospective company, which can range from start-ups to small businesses, to mid-to-large sized companies?
3. Are there requirements for only certain industries or geographical locations?
4. What is the time commitment in the classroom, at the company site and with students?

E. Project Development / Scoping and Defined Outcomes

1. Who will be working with the company executives to define and develop the project objectives, requirements and desired outcomes? For some programs, it may be the faculty, for others, it is the students.

At Pepperdine's Graziadio School, the faculty will determine the scope of work and defined outcomes in advance of the project start

F. Confidentiality and Rights to Work

1. Does the program guard your investment? Find out how company-provided information is protected.
2. What type of work is produced, such as ideas, discoveries or improvements?
3. Are the rights to the work exclusive to the company or is it in joint ownership?

Pepperdine's Graziadio School program includes a Restricted Use Agreement "works made for hire" provision, whereby work produced vest exclusively to the company.

G. Fees or Contribution requirements

1. Is the program you are considering within your price range? Fees for MBA student consulting programs can range from free to upwards of $25,000. Some programs, including Pepperdine, may solicit contributions rather than fees to support the program, which may be tax deductable as donations.

If you would like more information on the Pepperdine University Graziadio School of Business and Management E2B program, please visit: http://bschool.pepperdine.edu/programs/e2b/ or contact the Program Director at doreen.shanahan@ pepperdine.edu.

BEACON ECONOMICS

GlobalForecast

by LynnReaser

Are Your Financial Supply Chain Goals on Target?

Make your mark with *Global4PL Supply Chain Services*

Expert Resources
Customizes Solutions
Freight Post Audits
Compliance Programs
Financial Savings ROI
Import / Export
Training

What We Do: We help our clients save large amounts of money, improve efficiencies, and avoid costly errors in their global logistics operations.

Who We Are: We are a team of high-performance, hands-in industry veterans that come to the table with proven experience. We deploy experts in import / export compliance, multi-mode transportation, partner negotiations, third party logistics, and general operations management to implement innovative solutions with immediate, measurable results. Our resources, along with our supply base management techniques, collaborative communication infrastructure, and technologies frequently produce savings of 15% to 35% of a company's logistics spend.

Customized Supply Chain Solutions to Help You Succeed

See how our results speak for themselves

Transportation Cost Savings

We conduct a 1-2 day no-cost audit of your transportation spend and identify opportunities for cost savings in areas such as rate reduction, coding errors, commodity code reclassification, or service level requirements. At the conclusion of this audit, we present you with our findings and recommendations, including a quantifiable cost savings opportunity.

Client: Large West Coast contemporary clothing retailer
Concern: The client company was concerned that its global transportation expenditures were escalating and they could not pinpoint cost savings opportunities. The company also desired to establish a best-practices import compliance program to eliminate non-compliant entries and subsequent risk of fines and penalties.

Results:
Global4PL conducted a post-audit of recent freight invoices and shipments, and discovered transportation cost savings totaling over 27% net cost savings. Global4PL reviewed the company's import compliance program and documented required changes to achieve best-practices status, and identified classification changes to comply with US CBP regulations.

CBP, BIS, and SOX Compliance

We offer a comprehensive set of services to ensure compliance with import / export regulations and to improve the efficiency of your compliance processes. We develop and document a comprehensive import / export program proven to pass muster with CBP and / or BIS in the event of an audit or error. We will ferret out errors to avoid costly fines. We will identify any duty savings opportunities.

a. Review existing operations
b. Set up compliance programs
c. File rulings
d. Review products, classification, create databases
e. Free trade agreements – qualifications / reviews
f. Create policies and procedures
g. Draft disclosures

Client: Mid-size computer company
Concern: The client company had a small logistics staff with limited import/export compliance expertise and a potential risk of non-compliance in import/export operations.

Results:
Global4PL compiled a best-practices import/export compliance program that detailed compliance procedures, documentation formats and record retention methods and requirements. Global4PL reviewed all products' HTS commodity codes and uncovered a classification error. Then, to rectify the past errors, Global4PL prepared thorough documentation of the errors, calculated duties owed to US CBP, and prepared the post-entry filing for submission to US CBP. The self-disclosure was accepted by US CBP with no assessment of penalties and no further action.

Logistics Strategy

We conduct a complete review of your supply chain management that spans all movement and storage of raw materials, work-in-process inventory, and finished goods from point of origin to point of consumption. We provide a complete assessment of your inbound & outbound distribution, warehousing, and reverse logistics functions, both domestically and internationally. We identify inefficiencies and opportunities for cost savings.

Client: Large telecommunications manufacturer
Concern: The client company modified its supply chain footprint as the market and strategies shifted over time.

Results:
Global4PL executed the project to rationalize the company's logistics strategy and to optimize the revised supply chain strategy. Global4PL's assessments (including geopolitical and process risks) and solutions improved the company's intra-Asia shipping efficiency. Global4PL set up customized import / export compliance programs, having met with officials at contract manufacturers and conducted packaging redesign which resulted in 53% overall cost savings without compromising engineering requirements. Global4PL revamped transportation provider relationships, resulting in 20% reduction in transportation costs. Global4PL developed and implemented an operational strategy to minimize EU VAT charges (including reverse logistics considerations). Last, but not least, Global4PL provided a supply chain visibility tool (PO Horizon™) that tracks product movement at the part number level.

"In the first month we engaged Global4PL we were able to implement three cost reduction projects which will result in millions of dollars in savings over the next five years".

JB Delaney
Director, Supply Chain
Infinera Corporation

GLOBAL4PL SUPPLY CHAIN SERVICES

Contact Global4PL today.
E-mail us at info@global-4pl.com or call us at 866.475.1120 to arrange your free assessment.

www.global-4pl.com

Key Chapter Findings

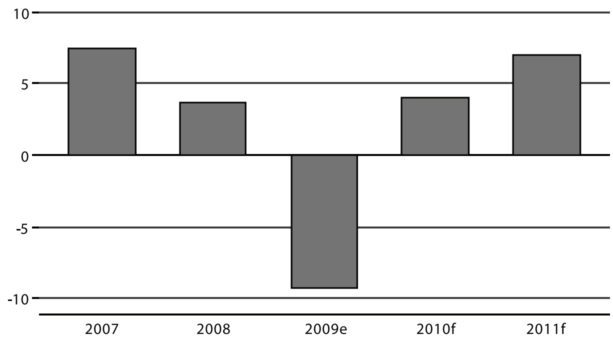
- Look for world trade to recover in 2010 with a gain of about 4%, following this year's estimated plunge of around 9%. Expect a further advance of around 7% in 2011.
- California's exporters should participate in the recovery, supported by a weaker dollar and at least modest growth in most countries.
- In addition to agricultural products, California should see considerable demand for computer and electronics products, machinery, transportation equipment, and chemicals.
- China and South Korea present the most potential growth for California firms selling abroad during the coming two years. Hong Kong, Singapore, and Canada should also offer significant opportunities. Among the state's ten largest export markets, Japan and the U.K. are likely to show the slowest growth.

Setting the Course for World Trade

The world economy has suffered a cruel, synchronized recession, with no safe harbor. Housing boom-and-bust episodes have pummeled countries such as the United Kingdom, Spain, Australia, and New Zealand, along with the United States. Financial problems have engulfed banks in nations ranging from Iceland and Latvia to Germany and Ireland. A pullback in consumer and business spending became a universal trend, while cutbacks in trade finance aggravated the downward spiral. The numbers speak to the damage: the volume of world trade will probably show a plunge between 9.0% and 9.5% for 2009 as a whole.

Fortunately, the worst of the downturn appears to be over. Although not coordinated, the simultaneous efforts of countries throughout the world to resuscitate their economies via aggressive fiscal and monetary policies appear to be achieving some success. Even though loan losses will continue to plague the banking system, financial markets are again functioning well enough to probably support 4.0% world trade growth during 2010, with a further 7.0% advance in 2011. Placing these figures in perspective, trade expanded 7.5% in 2007.

World Trade Dives, Recovers
Real Volumes, Annual Percent Change



e = estimate, f = forecast
Sources: International Monetary Fund and PLNU

Decoupling – Myth or Reality?

As 2008 unfolded and the optimists became less confident that a serious U.S. recession could be avoided, there was some hope that a worldwide downturn could still be averted. For example, growing household incomes and spending might provide a buffer for such countries as China, South Korea, and Vietnam. Many emerging markets, including Brazil and Mexico, had managed their economies more prudently, becoming less dependent on short-term "hot" money flows. Indeed, banking crises did not flare up everywhere – Canada's banks sidestepped the assumption of many of the toxic assets crippling markets elsewhere. Housing bubbles were not universal – Germany avoided the upswings and downswings seen elsewhere in the eurozone. Still, the falloffin demand, the cutbacks by risk-averse investors, and the drop in remittances by workers abroad ultimately quashed most proponents of "decoupling."

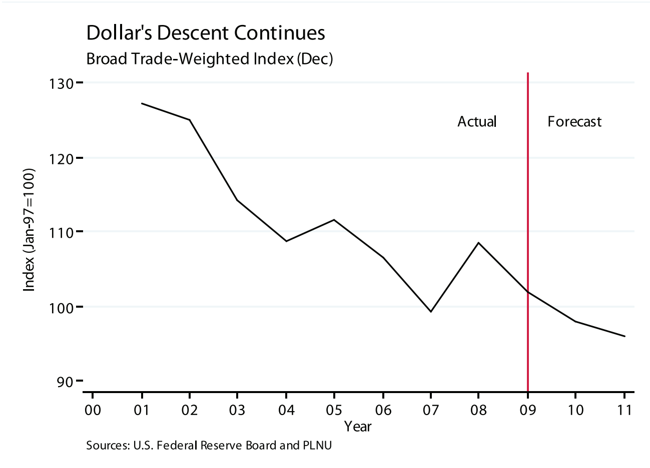
China's success in restarting its economic engine, which sparked a revival in commodity prices and trade throughout Asia, did rejuvenate a few advocates of decoupling. The recent experience would suggest that the emergence of consumer markets in various countries can drive some independence of performance, but the linkages offi nancial markets and trade will limit the extent and impact of decoupling in the near term.

Risks to Global Trade – What Could Capsize the Boat?

What could drown the prospects for a recovery in world trade during the next couple of years? Three forces likely pose the greatest risk. First, a failure of U.S. consumer spending to show at least a modest expansion would bring an early end to the improving signs we have recently seen. Second, another tidal wave of bank credit losses, such as losses from commercial real estate loans, consumer credit, or loans made to finance corporate buyouts, could ravage stock and bond markets along with financing. Third, an early upswing in inflation could provoke a round of monetary policy tightening around the world, stifling prospects for growth. While none of these risks appears high, they are not negligible and merit a close monitoring.

Prospects for the Dollar – Moving Downstream

From its peak early in 2002 until mid-2008, the greenback shed 26% versus a broad-based index of the countries accounting for the bulk of U.S. trade. This decline was reasonably orderly and, as theory would suggest, helped to reduce a burgeoning trade deficit by making U.S. exports more competitive and imports more expensive. The overall current account deficit peaked at $804 billion in 2006 and fell to $706 billion in 2008.



The dollar reversed course last year as investors sought a safe haven, opting for the "mattress" of short-term Treasury bills. The greenback's value rose 9% in 2008. This year has witnessed the unwinding of that strategy, as investors have moved back into stocks and bonds and invested in higher-yielding currencies, such as those found in Canada and Australia.

Look for risk tolerance to play a diminishing role in dictating the dollar's course during the coming year as other factors move to the forefront. The U.S. trade deficit is likely to widen again in 2010 as the rebuilding of business inventories causes imports to rise faster than exports. The federal deficit is on target to equal around $1.6 trillion in fiscal 2009 and could sum to a cumulative $10 trillion over the next ten years. A

BECOME AN *EDUCATION TO BUSINESS* PARTNER COMPANY.

As an E2B (Education to Business) Partner Company, you'll receive expertise from Pepperdine's world-class faculty as well as fresh, practical insight from up-and-coming business leaders. The many benefits to participating in our exclusive E2B program include:

- Faculty guided case development to define strategic issues
- Three to six competing teams of MBA candidates, investing 13 weeks of class time to research, analyze and develop recommendations for resolving a partner company's specific business issue
- A substantial consultative deliverable, both oral and written, at the end of the trimester
- Third-party perspectives with fresh objectivity
- Networking opportunities with top-quality students and faculty
- Relevant management information and vast library database resources
- Built-in project checkpoints that allow the professor and company executives to monitor and guide student progress
- Strict confidentiality

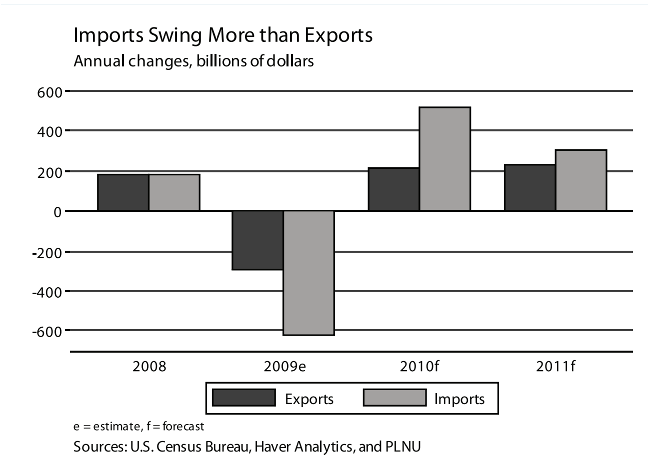
PEPPERDINE UNIVERSITY
Graziadio School of Business and Management

For more information about the E2B Applied Learning program, please contact Doreen Shanahan, E2B Program Director, at **310.568.5700 Ext. 9042 or E2B@pepperdine.edu.**

weaker dollar may be required to coax the necessary funds to our shores. International investors now own more than half of all privately held Treasury securities. Any fears about future U.S. inflation, even if unfounded, could also pressure the dollar. No massive dollar sell-offis likely, but a decline of approximately 4% on a trade-weighted basis is likely in 2010 and a decline of 2% is likely in 2011, following an estimated 6% decrease in 2009.

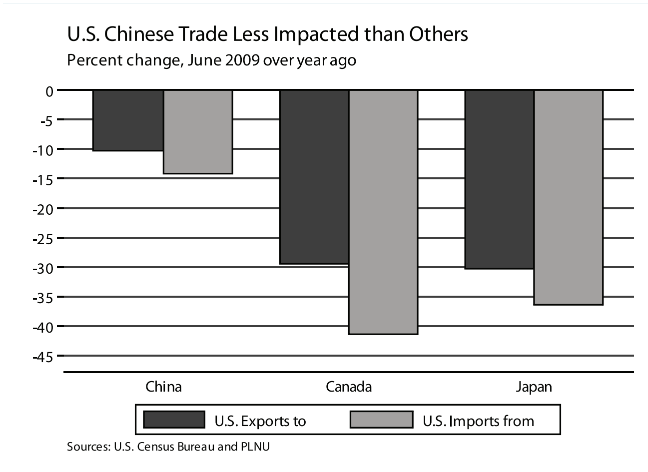
A Shrinking Trade Deficit, but How Sustainable?

The U.S. trade deficit has shrunk dramatically over the past three years after cresting in 2006. Total trade expanded on both sides of the ledger in 2007 and 2008, but export growth outpaced that ofi mports during both years. The story has changed radically in 2009. The recession has slashed both exports and imports, but the drop in imports has been twice that of exports. As U.S. manufacturing has migrated overseas, other countries have borne more of the swings in American demand. They have benefited more from booms in U.S. demand but have also suffered more from the severe declines.

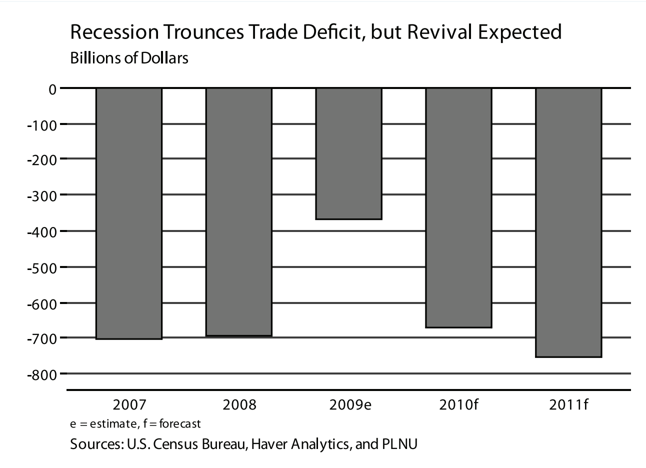


The experience among America's major trade partners has differed significantly. For example, in June 2008, the U.S. had its largest trade deficits with China, Canada, and Japan. A year, later, the trade deficit had diminished significantly with all three countries as imports fell more than exports in all three cases.

The import decline from Canada has been particularly stark, with a plunge of about 40%, reflecting in part lower prices for energy and some other commodities. Exports fell nearly 30% to Canada. Similar large declines have been witnessed with Japan. In contrast, exports to China decreased about 10% over the year, while imports fell 14%. The more moderate drop in China-bound exports mirrors the greater relative strength of demand in the Asian nation. The more moderate fall in U.S. imports from China reflects the continued appetite for Chinese-made consumer goods, especially as budget-conscious American consumers have shifted to lower-cost products.

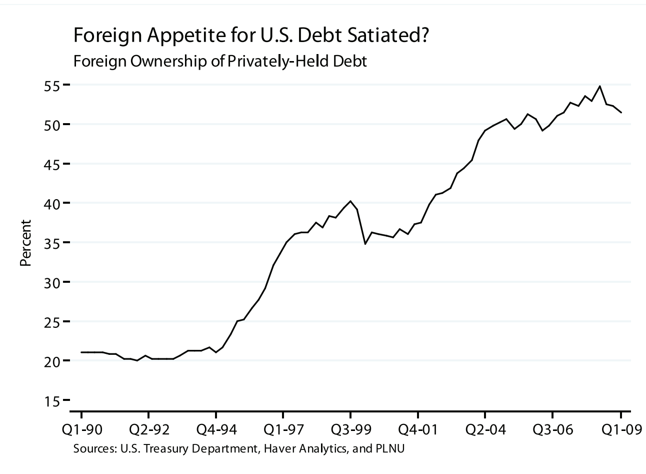


The striking reduction in the U.S. trade deficit is likely to be temporary. A revival in U.S. consumer and business spending, even if only moderate, will draw in more imports. The rebuilding of business inventories will amplify the return ofi mported products. As a result, although both exports and imports are likely to expand in 2010 and 2011, a larger rise in imports is likely to drive the trade deficit higher again. Still, the total expected two years from now is likely to be less than the 2006 peak.



California's Export Markets – Assessing the Currents

The value of goods produced in California for export reached $145 billion in 2008. This represented a gain of 8% over 2007, with average growth over the five years since 2003 at 9%. Exports have fallen this year, but we expect them to rise in 2010, with further momentum in 2011. In addition to agricultural goods, California's leading exports include computer and electronics products (including components for manufacture and re-export), machinery, transportation equipment, and chemicals.



How will California's top ten export markets perform? The following section rates each of them based on expected sales potential during the 2010-2011 timeframe, the risk to that forecast, and the impact of expected currency changes on California's competitive position. Grades of "A" (highest) to "F" (lowest) are assigned.

Mexico – Looking North

The steep downturn in the United States has pummeled the Mexican economy in the past year as exports dried up, incomes from jobs across the border evaporated, oil prices dropped, and an outbreak of the swine flu caused businesses to be shut during early May. Real GDP plunged at an annualized rate of over 20% from the prior quarter in this year's first three months and another 4% in the quarter ending in June. Some of the negatives are now beginning to unwind. Although the sharp drop in U.S. jobs will continue to weigh on remittances, exports and oil prices are recovering. Some American companies, assessing the cost of transit from Asia, are refocusing on the benefits of maquiladoras. Investors are likely to include Mexico as they return to emerging markets, and tourism should pick up over the coming year.

Still, the challenges facing our southern neighbor loom large. Disruptions to cross-border trade and tourism from tighter security measures have added to the problems of Mexico's drug cartels and wars. President Felipe Calderón has also not been able to implement reforms in energy (still primarily a government monopoly), education, and taxes t¬o boost the economy's growth potential.

Look for Mexico to achieve modest growth during the next two years, with swings in oil prices probably causing the major risk to that forecast. Anticipate some recovery in the value of the peso, which will give some help to the competitive posture of California's exports. On balance, a "C" grade appears appropriate for the Mexican market.

Global Supply Chain Leaders Group Webinar Series Complimentary Training Programs

The Global Supply Chain Leaders Group (GSCLG) is pleased to provide you with access to our complimentary Import Compliance and Essentials of Export Controls webinars. The programs offer 10 hours of all-inclusive training and can be taken at your own pace. These programs provide you with a free-of-charge and time efficient opportunity to gain knowledge critical to your company's import and export operations.

Import Compliance

Module 1: The Harmonized Tariff Schedule of the United States

Module 2: Duties & Tariff Engineering

Module 3: Import Compliance

Module 4: C-TPAT Security Awareness

Essentials of Export Controls

Module 1: Export Control Basics

Module 2: Classifying your Item and Determining if you need a license

Module 3: General Prohibitions including Prohibited End-users and End-uses & activities

Module 4: Using License Exceptions

Module 5: License Application and Supporting Documentation

Module 6: Export Clearance and Record keeping

Module 7: Introduction to BIS Deemed Export Policies

Module 8: Overview of the Antiboycott Provisions of the Export Administration Regulations

This program is sponsored in part by PO Horizon and by Global4PL Supply Chain Services.

We hope you enjoy these training programs. All we ask is that you complete a short survey at the end.

Thank you for your continued support of the GSCLG. If you have topics for additional training programs please submit your ideas in the suggestion box at **http://www.gsclg.com/eCollege.php**.

To begin, please select: **http://www.gsclg.com/eCollege.php**

GSCLG

Canada – Looking South

Despite the success of Canadian banks in avoiding the financial meltdown experienced by their American counterparts, the falloffin industrial demand pummeled the country's commodity and high-tech economic base. Interest rate cuts by the Bank of Canada, combined with tax cuts and a step-up in government spending, have produced some recent improvement in sales to consumers and factory orders.

The rebound in Chinese demand for raw materials and investors' renewed interest in commodities have spawned a revival in energy and metals prices. Some pickup in U.S. consumer and business spending should help the nation's growth prospects. The success of the U.S. "cash for clunkers" campaign has prompted some rise in auto production, although much of the increase may be in facilities in areas outside the border area.

The lack of major imbalances in Canada's economy should promote a resumption of general economic growth, although the tight linkages to the United States will limit its potential if American growth is sluggish. The currency's further expected appreciation is likely to give California exports some edge. Overall, a "B" rating for Canada as a potential export market seems warranted.

California's Leading Export Markets

Country	Volume 2008 ($ Billions)	Avg. Annual Growth (2003-08, %)
Mexico	20.5	6.6
Canada	17.7	9.6
Japan	13.1	2.2
China	11.0	15.2
South Korea	7.7	9.9
Germany	5.8	10.1
Hong Kong	5.7	6.4
United Kingdom	5.5	4.9
Taiwan	5.1	3.0
Singapore	4.1	4.0
TOTAL	144.8	9.0

Sources: Wiser, Haver Analytics, and PLNU

Japan – Avoiding Another "Lost Decade"

After a year of steep decline, Japan staged a 3.7% annualized growth in real GDP during the second quarter. A rebound in exports to China, a government stimulus plan (including incentives for the purchase of ecological products), and less inventory liquidation drove output higher. Yet, Japan's failure to mount a sustained recovery during the 1990s because of troubled bank balance sheets and premature fiscal tightening give reason for caution.

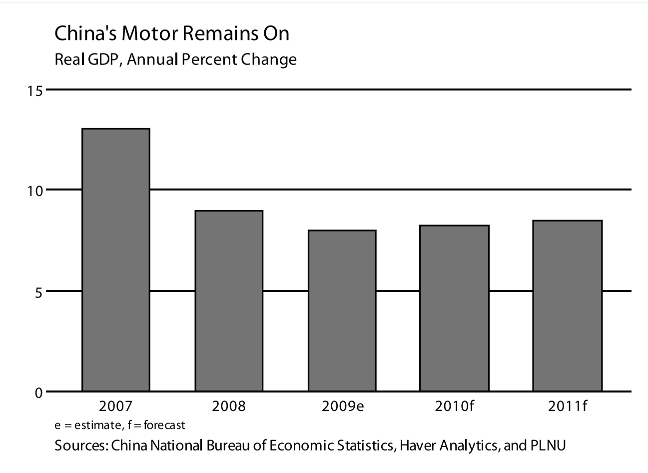
The decision of Japanese voters to oust the Liberal Democratic Party (LDP) after more than a century of dominance brings new uncertainty into the mix. Expect the newly elected Democratic Party of Japan (DPJ) to follow a more populist strategy aimed at households. Increases in the minimum wage, tax credits for new parents, reductions in gasoline taxes, and education subsidies are all on the table. The nation's debt, now equal to about 170% of GDP – versus around 58% in the U.S. ratio – could cause larger Japanese corporations to bear some of the resulting increase in costs. Business investment and hiring could accordingly suffer, stifling the recovery.

Japan's auto industry also is losing its competitive edge and its ability to boost the economy. Korea has made impressive strides with its lineup, the Europeans continue to challenge Japan's luxury models, and China and India are eventually set to challenge the lower end of the market. Even new models from General Motors might represent some competitive threat to Japanese firms.

Although Japan's economy is likely to grow in both 2010 and 2011, gains are expected to be modest and risks are significant. The dollar should be at an attractive level for U.S. exports, although the yen's further appreciation is likely to be limited in light ofi nvestors' uncertainty about the Japanese economy and the desire of Japan's government to maintain a competitive currency. As a result, we give the country a "D" in terms ofi ts export potential.

China – Managing Growth

While many analysts thought that the United States would lead the world out of recession, China appears to be at the forefront. Confronted by rising unemployment and the prospect of social unrest, the Chinese government launched a $585 billion stimulus package in late 2008. Although vestiges of China's command and control economy are inefficient, and its financial markets are underdeveloped, the Chinese government was highly effective in quickly reviving economic activity. Banks, instructed by the government to step up lending, injected $1.1 trillion of new loans into the economy during the first half of 2009, a threefold increase over the prior year. Combined with heavy investment in various infrastructure projects and consumer rebates for purchases of home appliances, computers, mobile phones, and cars, this flood of new money helped drive real GDP sharply higher in the second quarter.



China now faces the challenge of guiding the economy back to a channel of sustainable growth. The risk of a bubble in stock and property prices, along with a rash ofi ll-advised loans, is palpable. Fortunately, the government has already taken steps to slow down lending and infrastructure spending, but its success in fine-tuning the economy remains in question.

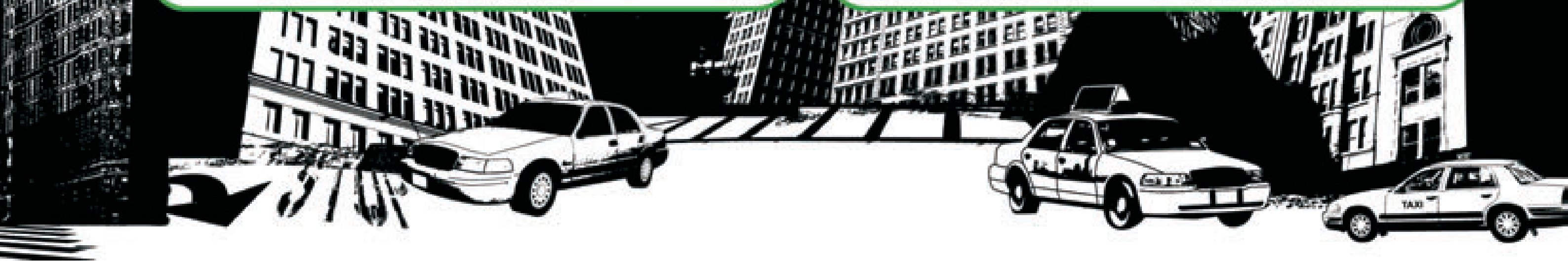
Look for China to see real GDP growth in the range of 7.5% to 9.0% starting this year through 2011, making it potentially one of the most rapidly expanding markets for California exports. China's demand for high-tech products and machinery as it builds out its infrastructure and boosts productivity will benefit California firms. Rising incomes in the country and a voracious demand for raw materials should further raise prospects for the state's exporters. There is some risk to the downside should the government have to take stark measures to curb overheating. The Chinese government is also likely to allow its currency to appreciate only modestly to protect its exporters. Despite these latter two factors, the growth prospects argue for an "A" rating for China for California exporters.

South Korea – Swimming to the Surface

South Korea has joined its Asia neighbors in staging a sizable recovery in the second quarter. Real GDP bounced higher at an annualized rate close to 10% in the three-month period ending in June, even as the pace ofi nventory liquidation accelerated. Rising internal investment and consumer spending combined with expanding exports to drive output higher. Home prices have started to rise.

Inflation has cooled from a 13-year high of around 5% last year to around 3% in 2009, with higher unemployment pushing wages lower. Banks and non-financial firms, which rely on foreign sources, have seen their access to dollars improve markedly in contrast to the paucity off unding earlier this year.

Look for South Korea's economy to show sizable growth during the next two years. The central bank has warned of the risk of overheating, but consumer caution is likely to help keep the brakes on growth. As investor concerns about the country's current ac-


TAXI

count balance and growth prospects have eased, the currency has appreciated, with further gains anticipated to levels that should be more competitive for U.S. exporters. Although security risks with North Korea are likely to persist, the country rates an "A" rating as an export destination.

Germany – Jumping the Waves, but Can It Last?

While the eurozone seemed destined to lag any revival in world economic growth, Germany managed a boost in second quarter output, with real GDP posting a small 1% annualized gain. In contrast, first quarter numbers revealed a harsh 13% annualized drop. Albeit delayed, the European Central Bank's steps to pump sizable amounts ofl iquidity into the system, combined with various fiscal stimulus measures, including government spending and a German "cash for clunkers" program (modeled after the concept first launched in France in December 2008), helped stabilize the economy.

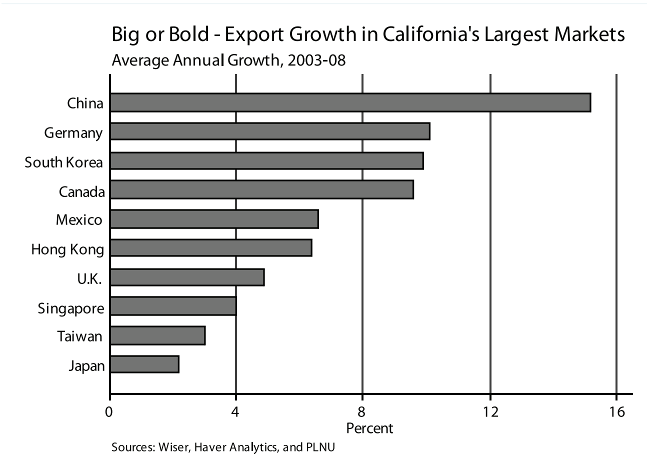
Prospects going forward are more circumspect. Do not expect any additional easing from the European Central Bank as monetary policymakers in the region generally believe they can only effectively control inflation and should not engage in fine-tuning economic growth. The German government's commitment to reducing the deficit is likely to stem further fiscal stimulus.

On balance, look for Germany's economy to post moderate growth over the next two years, with considerable risk. For California exporters, expected further gains in the euro, as international investors diversify their investments into non-dollar assets, will help the state's firms compete more effectively in Germany. Still, the expected fall of the dollar versus the euro is likely to provide only a partial offset to growth prospects and the attendant risks. Germany's export market grade is a "C."

The United Kingdom – Trying to Right the Ship

The U.K. has paralleled the U.S. experience of the past two years more closely than any other nation. A traumatic housing cycle, an implosion of bank balance sheets, and a crumbling of business and consumer confidence enveloped the nation. A vigorous policy response was launched, including steep interest rate cuts, intervention to assist crippled banks, and fiscal stimulus, including Britain's version of a "cash for clunkers" program. Although real GDP continued to fall in the second quarter, business surveys suggest that output is bottoming out.

Still, the recovery remains fragile. Regulation and taxes are eroding London's leadership as a major financial center, although in the near term there may not be a dominant alternative. In recognition of the economy's vulnerability, the Bank of England left its key interest rate unchanged at 0.5% in early August and opted to expand its purchase of government and corporate securities to enhance its program of "quantitative easing." The magnitude of the budget deficit may prevent further fiscal stimulus.



Look for Britain's economy to gradually improve over the course of the coming year. As in the United States, a number of risks surround this forecast, including further write-downs on bank balance sheets, a hesitant consumer, and a fledgling bottom in housing. While the pound's recent rally makes U.S. goods more competitive¸ the nation's challenges could limit the size off urther gains. The combination of growth, risk, and expected currency movements suggest a "D" as the appropriate grade.

Hong Kong – Investors Throw a Life Raft

Supported by its largest export market, China, Hong Kong bounced back last quarter. Real GDP, which had suffered an annualized plunge of around 16% in the first quarter, staged a 16% annualized gain last quarter. Fiscal stimulus, particularly in construction, has helped, and the stock market's sharp rebound has been pivotal in the upswing. A revival in Hong Kong's Initial Private Offering (IPO) market has attracted large amounts off oreign capital.

The recovery is still in its early stages, with rising unemployment checking consumer spending. Concerns about swine flu are still curbing critical tourism from China. The success or failure of China in guiding its economy will largely dictate Hong Kong's future.

On balance, expect Hong Kong to show relatively rapid growth over the coming two years, although the risk of overheating/rapid cooling in the tightly linked Chinese-Hong Kong market exists. Hong Kong's maintenance of a tight peg to the dollar will continue to constrain the competitive position of California exports. Despite the risks to growth and the disadvantage in terms of currency values, Hong Kong's growth prospects award it a "B" as an export market.

Taiwan – Dependent on World Tides

Riding the same currents flowing throughout Asia, Taiwan has recently seen better economic news, even though Typhoon Morakot exacted a serious toll on lives and property on the island in early August. Real GDP soared at an annualized rate of 19% from the prior quarter in the April-June period. China's rebates on home appliance purchases spurred a pickup in demand for Taiwanese electronics products. Demand for liquid crystal display (LCD) panels for televisions has also improved considerably. Still, internal demand from consumers and businesses remains soft. Rising unemployment and weak income gains are hampering consumer spending, while uncertainty and tight credit is constraining business investment.

Look for Taiwan's economy to be driven by prospects in China, the United States, Europe, and the rest of the world. Growth is likely to be moderate, with considerable risk. The government will probably allow only limited appreciation ofi ts currency, which will constrain the competitiveness of California products. Overall, a "C" rating appears appropriate.

Singapore – Open Waters

As one of the most open and export-dependent economies in the world, Singapore's economy is at the mercy of swings in world trade.

Not surprisingly, the harsh downturn of the past year sent waves crashing down on the city-state's economy. As witnessed in most of Asia, improvement did surface in the second quarter. Rising exports, inventory restocking by electronics manufacturers, and government infrastructure

Report Card
California's Export Potential
2010-11*

China	A
South Korea	A
Hong Kong	B
Canada	B
Singapore	B
Taiwan	C
Germany	C
Mexico	C
Japan	D
U.K.	D

*Ratings based on assessment of growth, risk, and exchange rates
Source: PLNU

spending drove real
GDP up at a 22% annualized clip. A strong upturn in biomedical manufacturing also contributed, although this sector remains highly volatile.

The expected upturn in world trade during the coming two years should push Singapore's economy forward, but any risk to U.S. or Chinese growth represents sizable risk. In the meantime, slack income gains will limit consumer spending while business investment is likely to wait for more tangible signs of a durable recovery. Singapore's currency can be expected to appreciate further vis-à-vis the dollar, which will help the competitive posture of California exports. We rate the country's export potential as a "B."

Keys to Surviving Foreign Waters

These trends and expectations suggest certain strategies to manage international business lines during the next two years.

First, recognize that currencies represent one of the most difficult economic variables to forecast. Forces driving exchange rates change over time and can encompass risk aptitude, interest-rate differentials, political perception, and comparative growth rates. Changes in investors' views about currencies can be sudden and dramatic. As a result, companies would be well served to consider hedging against currency risk so they can concentrate on their core products and marketing plans.

Second, elections and other political developments merit close monitoring. Political actions can include investment restrictions, credit controls, and expropriation off oreign-owned assets. Political backlashes could be substantial during the next two years as electorates voice displeasure if economic prospects fail to materially improve. Preemptive actions by businesses to safeguard against such possibilities could be vital.

Third, evaluate on a periodic basis the costs and benefits off oreign versus more localized sourcing. Rising energy prices may make the cost of shipping goods from Asia uneconomic relative to the costs of producing in the United States or Mexico. The benefits of shorter shipping times to inventory management, better quality control, and tighter linkages between designers and manufacturers may also outweigh labor-cost savings.

Fourth, importers should expect more requirements from the federal and state governments, consumers, and retailers for verification that foreign plants meet certain safety, health, worker, and environmental standards. These requirements suggest that companies desiring to maintain foreign firms as part of their supply chain will need extensive systems and resources dedicated to reporting and compliance.

Overall, California firms are well positioned to benefit from the expected recovery in global trade during the coming two years. While export markets carry particular challenges, many firms will find them to be a vital part of their business and growth strategies.

More reasons to join GSCLG

- Reinforce your company's commitment to support educational efforts by aligning your organization with GSCLG and its mission to provide high quality Supply Chain programs and resources.
- Capture the attention of managers and other decision-makers by exhibiting at GSCLG conferences. Members realize significant discounts and are given priority when selecting their booth location.
- Obtain member discounts on GSCLG conferences and network with the most innovative people in the industry.
- Gain participation in the Global Shipper Consortium program for qualifying companies.

Membership Levels & Dues

Senior Executive Membership - By Invitation Only
(For Supply Chain executives at VP / SVP / C-Level)

This membership is by invitation only, for senior Supply Chain executives of non-service provider corporations. This is not intended for sales or business development, but rather it provides a truly unique networking opportunity for senior executives at their level or higher. Membership is contingent on confirmation of the applicant's senior executive position for a non-service provider and subject to approval by the GSCLG Membership Director to ensure a balance of industries and networking opportunities.

Platinum Sponsor ($25,000)
(Includes individual member benefits for two senior executives)

- One free exhibit space (10' x 10') at GSCLG's annual conference ($2,250)
- Four annual conference registrations ($800 each)
- Four pre-conference workshops at annual conference ($400 each)
- Two seats at each of the Senior Executive Networking Dinners
- Listing in sponsor directory distributed at all GSCLG specialty conferences
- Company profile and web link
- One full page advertisement in monthly GSC Review (valued at $48,000)

Gold Sponsor ($15,000)
(Includes individual member benefits for one senior executive)

- One free exhibit space (10' x 10') at GSCLG's annual conference ($2,250)
- Two annual conference registrations ($800 each)
- Two pre-conference workshops at annual conference ($400 each)
- One seat at each of the Senior Executive Networking Dinners
- Listing in sponsor directory distributed at all GSCLG specialty conferences
- Company profile and web link
- One full page advertisement in monthly GSC Review (valued at $24,000)

Gold Corporate ($5,000)
(For companies with up to 500 employees)

- Includes individual member benefits for 20 employees
- One free exhibit space (10' x 10') at GSCLG's annual conference ($2,250)
- One annual conference registration ($800 each)
- One pre-conference workshop at annual conference ($400 each)
- Listing in sponsor directory distributed at all GSCLG specialty conferences
- Company profile and web link

Standard Corporate ($2,000)

(For companies with up to 20 employees)

- Includes individual member benefits for 10 employees
- One annual conference registration ($800 each)
- One pre-conference workshop at annual conference ($400 each)

Individual ($225)

- Includes member benefits allowing for opportunities for growth so that the individual may become a future corporate member
- Up to fifty percent discount to all GSCLG events
- Access to members-only events

Media Partner (Call for additional information)

(For Print media companies with Monthly or Quarterly distribution)

- Two annual conference registrations ($800 each)
- Two pre-conference workshops at annual conference ($400 each)
- Listing in sponsor directory distributed at all GSCLG specialty conferences
- Company profile and web link
- Cross-advertising program

Contact: andrea.kostelas@gsclg.com for pricing information

We welcome your company's involvement as a GSCLG sponsor, a corporate, or an individual member!

Click Here To Register!

Publisher GSCLG Publishing

Editor Andrea Kostelas

Guest Contributors Lynn Reaser, President, National Association for Business Economics

Doreen Shanahan, E2B Program Director, Pepperdine University, Graziadio School of Business and Management

Advertising Director Fiona Lo

Photo Editor Sean Moore - GSC Review Photographer

How to reach us:

2953 Bunker Hill Lane

Suite 400

Santa Clara, CA 95054

800.354.8579

Web Site:

www.gsclg.com

The Global Supply Chain Review is a publication of the

Global Supply Chain Leaders Group