

SUPPLY CHAIN MANAGEMENT

3-PAGE SPECIAL REPORT

How Ireland can continue to succeed

By Dave Boland

Supply chain management is vitally important across any industry dealing in goods, rather than services. It used to be a fractured (and often fractious) process, involving all components working separately – raw materials intake, manufacturing, packaging, warehousing and distribution.

But modern, enlightened supply chain management tries to integrate and streamline each of the elements into a single, cohesive process, creating a seamless process that is hu-

gely important to the profitability of the company.

But supply chain management is not only important when it comes to the smooth running of systems. It is also crucial for companies operating in a demanding consumer society to offer upstream and downstream traceability across the supply chain. Recent scares in the food industry highlight the need for this traceability, which allows any necessary recalls to be carried out with the minimum of disruption.

But, more than this, effective supply chain management has also fundamentally changed the way the food industry operates across Europe.

"The proof is in the pud-



Paul Kelly, director of Food and Drink Industry Ireland

ding," said Paul Kelly, director of Food and Drink Industry Ireland (FDII, a division of Ibec).

"The industry has changed dramatically over the last few years. We have gone from a situation whereby we had butter mountains and wine lakes, and it was all about intervention, producing material that went into cold storage.

"Now that has changed completely. It's about selling high-quality products to demanding customers, such as top retailers and food service companies. These are demanding high standards in terms of quality, safety and provenance, and also in terms of contracts that need to be met on time.

And because of this, supply chain capability is as important as production and innovation."

Ireland can be proud of the fact that we are operating to international best practice, and this was reflected in our reaction to the pork dioxin scare where, because of prompt intervention, there was no direct threat to human safety.

"Food is a complex chain, from raw material to end user," said Kelly. "Something happens in one part of chain, and it affects every other part. There are legal imperatives governing the food supply chain as much as there are commercial imperatives, and this is why Ireland's food supply chain has to be operating

to best practice."

It is also important for our economy that our supply chain is functioning to its optimum level. Despite being a small island, Ireland is nevertheless performing well on an international stage, with 44 per cent of the food and beverages produced here going to Britain and a further 32 per cent ending up in mainland Europe.

The total turnover of the industry is €24 billion, of which exports accounted for almost €8 billion last year, representing an 11 per cent increase on the previous year.

"Supply chain management is a very important aspect of the industry," said Kelly. "Our motorway system has been

very beneficial, but there are still shortcomings – a number of our ports, such as Cork, Shannon and Rosslare, don't have that final stretch of high-quality motorway.

"Additionally, we feel that carbon taxes and the Climate Change Bill are resulting in increases in price of transport, and we are calling for acknowledgement that carbon taxes impact on transport costs, and therefore on our competitiveness. The climate bill goes way beyond the obligations set down by EU, so we are calling for it to be deferred."

But FDII is not only a lobby group – it is also involved in promoting ideas which it feels will benefit the food industry

in Ireland. For example, one area which FDII feels could have a significant positive impact on our competitiveness is what Bord Bia terms "co-operation". A synthesis of co-operation and competition, this involves a number of exporting companies coming together to cut the costs of supply chain management, before competing with each other once they arrive at their destination.

"We very much punch above our weight in the food sector," said Kelly. "But we are still a very small country, and scale is an issue. This is why co-operation makes sense both economically and financially."

Now there's food for thought.

Shipping firm is connecting Ireland to the continent

By Dave Boland

Sometimes, there are advantages to being perched on the western edge of Europe, staring out across the Atlantic. But from a supply chain perspective, being a small island in a big market can cause a few problems.

Take the example of sea freight. Until the arrival of CLdN RoRo SA less than two years ago, Irish freight had a few problems accessing the important markets of northern Europe. Trailers had to either take a ferry to France or, more usually, landbridge across Britain, neither of which was an ideal solution.

But since November 2009 and the advent of CLdN, these same trailers have had the option of travelling directly to the major ports of Rotterdam in the Netherlands and Zee-

brugge in Belgium, opening up a hugely lucrative new market to Irish exporters.

Indeed, the only surprise is that the corridor to these two landmark port cities had not been open prior to 2009. But now that the opportunity has arrived, anyone involved in importing or exporting can benefit from sailing with a shipping company with a long tradition in international transport.

CLdN is the parent company of Cobelfret Ferries, one of the leading ferry operators in northern Europe. Founded in 1928 and with a head office in Luxembourg, the group employs more than 1,300 staff throughout Europe – and since the establishment of a direct RoRo link between Dublin Port and Rotterdam and Zeebrugge, it now links Ireland with the rest of mainland Europe.

Indeed, the market has already reacted positively to these new sailings, which operate twice weekly to both the

Netherlands and Belgium (it takes 36 hours to sail to Zeebrugge, and 40 hours to Rotterdam). The customer base is growing significantly, to such an extent that CLdN has had to reassign one of its largest ships – the MV Pauline, a giant HumberMax vessel with a gross tonnage of over 50,000 – to its Irish routes.

"Due to the size of CLdN's asset base, we have the flexibility to introduce additional or larger tonnage at short notice to meet the demands of the market," said John Coleman, line manager at CLdN RoRo SA.

Indeed, the entry of CLdN has, to a large extent, revolutionised the way in which cargo moves to and from Europe. Its business model centres on the concept of providing direct, regular and reliable services between Ireland and two of the main continental ports with vessels which have been specially designed to accept



John Coleman, line manager at CLdN RoRo SA: 'We have the flexibility to introduce additional or larger tonnage'

MAURA HICKEY

maximum cargo volume based on the wide variety of cargo types which sail between the ports.

Designed by CLdN, these vessels accept containers, trailers, accompanied trucks with drivers, trade cars, mobile machinery and project cargo of all types (in fact, due to the unique design of the vessels, there are actually very few cargo types that could not be carried on-

board). Additionally, each vessel has a number of single rooms with en suite bathrooms to cater for these accompanied trucks – another example of how the shipping company is willing to put in place the things that they require for more comfortable and effective transport.

"In today's unprecedented economic climate, CLdN has responded to the Irish market's requirement for a high quality service at cost effective and stable price levels," said Coleman.

CLdN's positive contribution to the shippers of Ireland was recognised recently by The Irish Exporters' Association, which awarded the company with the Short Sea Shipping Company of the Year Award for 2010.

Despite only being in the Irish market for less than 18 months, CLdN (whose Irish office is located in Dublin Port Centre) has forged some long-term partnerships with suppliers and customers.

It also intends to expand its operations in Ireland over the coming years, to ensure that the market continues to provide its customers with the infrastructure to assist in their continued success. This is de-

spite the initial investment of approximately €90 million which has already been made towards its operations.

"Even in its distressed economic state, we continue to invest in the Irish trade, as we have a high level of confidence in the long-term future of the Irish economy," said Coleman. "We are confident that our service brings tangible competitive advantage to our clients."

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Getting infrastructure up to speed

By Dave Boland

A supply chain will only be as good as the transport infrastructure it uses. Ireland has not done too badly in recent years when it comes to upgrading its roads and other major pieces of infrastructure, but there is still a long way to go.

Furthermore, the ambitions of Transport 21 have been thwarted by the reality that the country doesn't have the money to carry all of them out.

In this context, the Chartered Institute of Logistics and Transport (CILT) commissioned a mid-term report on Transport 21 from Professor Austin Smith. While dealing primarily with passenger transport, it has some important things to say about logistics and the supply chain.

One of the main findings of the report is that the building of the motorways had a detrimental effect on railways, which are no longer attractive to passengers. But at least the building of the motorways offered freight companies greater linkages between the cities – even if not all freight users are driving on them yet.

"We want to encourage freight people to use the motorways," said Colm Holmes, chief executive of CILT. "There

are issues with tolling, which means some freight and road haulage operators don't use them. And while we feel that tolling will be necessary in the longer term, we would like to

see sophisticated tolling that penalises cars but not freight.

"There is a system in the Netherlands whereby they monitor all freight vehicles, and depending on the time of

day, there may be no charge. We would like to see a system like that. Or one which, if you are living somewhere that you have no option but to use the motorway, you should not be

paying tolls for using what is your only means of transport."

CILT is hoping to launch a degree programme in conjunction with the National Institute of Transport and Logistics.

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SUPPLY CHAIN MANAGEMENT

Keeping food on ice for customers

By Dave Boland

Some like it hot. Food, on the other hand, tends to like it cold, and in some cases frozen. Effective chilling and freezing is vitally important to the food and retail industries in Ireland, and companies operating in this space need to be confident of this temperature control across all links in the supply chain.

This is why they will only trust supply chain partners with a proven ability to deliver on time and at the right temperature – and why there are so few storage and distribution companies operating in Ireland which can offer this level of service.

Cold Move is one of these companies. Headquartered in Galway, where it operates a vast state-of-the-art facility for freezing and chilling (as well as a large high spec food manufacturing division), it has recently expanded its facilities and services to offer a nationwide food storage and distribution network.

Indeed, in just over a year, it has added two new facilities to its portfolio – a chilled and frozen foods site in Newbridge and a frozen food depot in Dublin.

Both of these sites were de-



Stephen Gillen, Jason Mallon and Frances Golden, of Cold Move

veloped in response to market requirements, and each has significantly added to the company's ability to provide a top

quality service to a client list which reads like a 'who's who' of major food operators.

Cold Move's Newbridge fa-

cility was developed in direct response to the fact that a number of Ireland's major retailers have chosen Kildare as their

location of choice for distribution hubs. But it would have been a logical move in any case, given Newbridge's strate-

gic location when it comes to servicing the east and south of the country. Its 25,000 square foot Du-

blin facility (which opened this year), though smaller, is arguably more important, especially for importers. This is not only because it gives Cold Move a presence in the capital (which would be an important consideration for any distribution business); it is also because the specific location of the facility, inside Dublin Port itself, allows clients to bring their stock to the port, drop it off, with Cold Move taking responsibility for the stock from that point on.

The developments in Newbridge and Dublin have hugely enhanced the capabilities of Cold Move across the whole of Ireland, and it plans to further develop these sites and grow its customer base. It already has a network of more than 40,000 pallet spaces, which can handle chilled, frozen or ambient foods – whether that is dairy, frozen meat, vegetables or any food which requires importing, exporting or delivery.

When it comes to exporters, its main clients are the food manufacturers of Ireland. "We manage the entire supply chain, from production line to end-user," said Jason Mallon of Cold Move.

"We go to their site, collect the products, bring them to the centre, freeze them, store them and finally organise the transport on the export leg," he said.

The importers, on the other

hand, tend to be retailers and wholesalers. These will generally organise their own import transport, with Cold Move taking responsibility for the remainder of the supply chain when the goods arrive into their depots.

Cold Move clients also benefit from the company's significant investment in its IT software and hardware. These systems give its customers complete visibility of their goods while they are in transit and in storage – they can either access Cold Move's warehouse management system, or physically go in to see the stock in the warehouse. Cold Move also operates an automatic POD service, which eliminates the need for companies to chase any paperwork.

Because of these investments, Cold Move expects to grow its business by about 10 per cent by the end of 2010. Even at a time when imports are down, this growth will be largely a result of the increase in the food export market. Indeed, Cold Move is already witnessing this increase taking place.

But any future growth will be hampered by a dysfunctional supply chain, which is why it is important that there are companies such as Cold Move which can provide a transparent and reliable storage and transport service for the chilled, frozen and ambient food industries.



John Whelan, chief executive of the Irish Exporters' Association (IEA)

Export sector in fine shape, but more can be done

By Dave Boland

Irish exports are booming, as the rest of the economy falters. In fact, exports in 2010 reached a total of €161 billion – a 6.7 per cent increase on the previous year – and this was in the depths of a recession. But this is not to say that we, as an exporting nation, are maximising our potential.

According to John Whelan, chief executive of the Irish Exporters' Association (IEA), there are a number of issues that need to be addressed if we are to truly capitalise on exports as a route out of our current financial woes. "The trouble is that the current government is in a lame duck situation when it comes to departments," he said. "This is why we are looking for a new Minister for Transport to provide integrated strategic support for an export-led recovery."

One key area which has been prioritised by the IEA is the notion of global distribution centres, such as those which exist in other European coun-

tries. "We're currently losing out on the manufacturing side of the economy, and we will continue to lose out unless we can provide reason for manufacturing to come here," said Whelan.

"One reason would be the support and promotion of major distribution sites. Other countries, such as the Netherlands, have done this, and it has bolstered their export sectors, which is why we need the IEA to be pushing this concept like their Dutch counterparts did. But we realise that it is going to be a big task."

Another area which the IEA feels needs urgent attention is the area of fuel prices. While there is little that can be done about the international price of oil, there are other mechanisms that Whelan said could be employed besides costs and structures to make the running of commercial vehicles more affordable.

He cited the special industrial user rebate in France as a "clever way of supporting industry" in the face of rising fuel prices.

"We believe that, if those exporting from Ireland were allowed to claim back a certain

element of the excise, the rise in fuel prices would not be damaging the competitiveness of the export industry," he said. "We know it would be difficult for the Minister for Finance to implement different pricing structures but, as they did in France, if we have to raise prices, then this is a smart way for exporters not to have to bear the brunt."

To put things in perspective, it has been estimated that each one cent per litre increase to the price of fuel costs the export industry some €8.1 million.

"To continue to ensure that competitiveness stays in place, we need to ensure that the costs of getting goods out of the country don't get hit," said Whelan. "We feel that a special industrial user rebate is a way around the difficulties."

While road transport may take up a significant amount of the focus of the IEA, it is by no means the only supply chain issue which the organisation feels requires attention.

For example, shipping was recently hit by the announcement by DFDS that it is to close its line at the end of January, thereby taking about 26

per cent of the capacity out of the central corridor (Dublin to Liverpool and Holyhead).

"Our concern is that this does not lead to increases in shipping costs," said Whelan. "We do understand the need for shipping lines to make an adequate profit, but when it comes to capacity, we feel that the rest of the players need to step up to the plate."

There are also issues with new ports, which have yet to be adequately addressed. But as with many of the major infrastructural issues facing the country at the moment, there is a lack of progress being made, due mainly to the political situation in Ireland and beyond.

"This brings us back to my earlier point about the situation in government," said Whelan.

"The new Minister for Transport is going to have to grasp the nettle to ensure that we're in right shape when it comes to our export policy. The fact is that the export industry is very much on a growth path, but to ensure continued growth we need our transport sector to be effective and efficient."

Moving to meet customers' needs

Transport company Kuehne + Nagel Ireland prides itself on its holistic response to the needs of business, writes Dave Boland

Demand needs to be met and, hence, goods need to travel. But there will always be differing views on how involved a company gets in moving goods from one place to another. There are some businesses which will regard logistics and transport as an external activity to their supply chain, to be handed over to a third-party provider who will take care of all aspects of the process. There are others, however, who will see the entire supply chain as being intrinsic to their overall business strategy.

"Engagement with customers always starts with understanding their needs," said David Sadlier, national sales and solutions director at Kuehne + Nagel Ireland. "We try to identify both their tactical and strategic supply chain requirements. Maximising the efficiency of the supply chain is common to all, however each company has its own specific needs and requirements."

"From purchase order management through air, road and ocean transportation to contract logistics and distribution, most customers needs will fall into this bucket at some point. Some of them may not have air transport in their supply chain," he said.

"Others might not have ocean transport. Some will have everything. It's our job to understand what those needs are, join the dots and to put a solution in place."

Part of a major multinational organisation that has 56,000 employees in 900 locations across 100 countries, Swiss / German company Kuehne + Nagel has been operating in Ireland since the mid-1990s. It has around seven million square feet of warehousing globally, and is one of the few companies in the market that has a single global IT platform which allows it to manage its various functions – air, ocean, road – in a concerted manner.

In 2009, it was voted in AT Kearney's Top 25 Best Companies in the World. In Ireland, Kuehne + Nagel has won the prestigious Irish Exporters' Association's Logistics Company of the Year in 2007 and 2010, and has substantially grown its business, practically doubling its turnover over the last five years.

Kuehne + Nagel's business philosophy is based on a partnership approach focused on mutual gain for both customer and supplier. This may seem to be a natural approach for a service provider to adopt – how-



David Sadlier, national sales and solutions director, Kuehne + Nagel Ireland

ever, to deliver sustainable supply chain value this approach must be adopted by both parties.

At its core, Kuehne + Nagel's engagement strategy is focused on delivering continuous improvement across the total supply chain. This engagement strategy is supported by a strong local management and operational team covering eight sites, allowing a significant amount of autonomy to build and manage both local and global relationships.

"Some customers just want a go-between, a third party contractor who can carry out a simple function efficiently and consistently" said Sadlier. "It's important for us to put in place the right infrastructure for these customers and move on with the relationship."

"Other customers, many of which drive the critical export market in the pharmaceutical/healthcare, agriculture, food, drink and technology sectors, need more a complex solution. Those industries tend to have more than an 'A-to-B' requirement, and generally what they want is more com-

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Head Office
CLdN S.A.
Rue Schiller, 3-7
L-2519 Luxembourg
Luxembourg

Bookings Desk
tel: 00352 26 44 66266
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SUPPLY CHAIN MANAGEMENT

Manufacturing sector in good hands

DIT's Executive Masters course in supply chain management ensures its graduates have the right grounding to excel in the industry, writes **Dave Boland**

News of the demise of the manufacturing industry in Ireland has been greatly exaggerated, and the recent announcement of Intel's €500 million investment in its Leixlip facility should be as good an indication as any that manufacturing is alive and well.

But manufacturing is only as good as its components, one of which is supply chain management – and Irish supply chain managers need to ensure they are operating to international best practice if our manufacturing industry is to compete at a global level.

"The announcement from Intel dispels the myth that we are operating in a post-industrial society where there is no future for manufacturing," said Edward Sweeney, director of the National Institute of Transport and Logistics (NITL) at DIT. "Of course, success for our internationally traded services is vital but, to a very large extent, the export of high-value products will still have a significant role to play in our future economy. But it will only work if we have our supply chain in place."

NITL is at the forefront of developing Ireland's supply chain capabilities, through its research and educational courses, of which the Executive Masters (leading to MSc) in Supply Chain Management is its flagship programme.

"We have always been aware of the fact that to be a good supply chain manager, there is a requirement on the part of individuals to have a variety of skills," said Sweeney. "Some of these are the hard technical skills, and most training in logistics and supply chain is about IT and technical issues such as replenishment of stock in a warehouse. That's the IQ side. But there is another side of the equation, which is about the softer skills and the EQ."

According to Sweeney, supply chain management is fundamentally about managing relationships, both inside the four walls of an organisation as well as with key suppliers and customers – upstream and downstream relationships.

"What marks out our Executive Management Programme is its strong focus on people management," he said. "What we've been doing for a long time – right from Module 1 – is to place a very strong emphasis on the people side of the supply chain."

While this emphasis has always been in place, it has evolved over recent years, and the "people" dimension of the programme has been strengthened. In addition to the compulsory introductory module which all students have to undertake, all learners have to study a further eight elective modules (out of a possible 20) – five of the options are about what Sweeney describes as "soft wiring", including modules on partnerships in the sup-



Edward Sweeney, director of the National Institute of Transport and Logistics (NITL) at DIT

ply chain, change management and managing people.

"Look at the most prestigious business schools across the world, especially in the US and the UK, and you will find that supply chain management courses tend to be focused on the other side of equation, the hard wiring," he said. "But at our annual conference last year, we were visited by John Gattorna from Australia, who explained how the supply chain was all about people."

"He shared my concerns that traditional programmes were far too focused on the traditional side of supply chain management, and he acknowl-

edged that we at NITL were at the vanguard of progressive teaching in supply chain management."

Indeed, by focusing on the softer side, NITL is not only representing international best practice in management, it is also ahead of the game when it comes to creating a new generation of supply chain management. Sweeney likes to draw on the example of an 'I' shaped person and a 'T' shaped person, with 'I' as a specialist in one area, and 'T' with an awareness of a wide range of issues, while retaining the important vertical elements.

"Companies say that they

need 'T' shaped people," he said. "You don't get rid of the specialist knowledge, but rather you build on it. You can be a great engineer, but you won't be great supply chain person without knowledge of a range of different areas, and this is why any good educational programme needs to build on the vertical part of the 'T', while also creating a wide range of skills."

In implementing its innovative programmes, NITL is both responding to the demands of industry and also helping to drive change across the board.

"It's a fundamental question

for us – do we lead or do we follow?" said Sweeney. "We say that we're doing both. We have to be responsive to industry requirements, but we also have to be more; we need to push out the knowledge required to change the traditional ways of thinking. Our research activity leads our educational activity, which is about disseminating new knowledge; and we can't just sit back and deliver programmes that people are telling us to deliver."

"It's like the old cliché – if you are standing still, you're falling behind. We live in a complex world, and just keeping up is a challenge."



Mark Fielding, chief executive, Isme

Ending of ferry routes is a major blow

By **Dave Boland**

The supply chain in and out of Ireland is facing some significant disruption with the decision by DFDS Seaways to close two key ferry routes out of Dublin at the end of January.

According to Isme, the Irish Small and Medium Enterprises association, the decision to close both the Dublin-Birkenhead and the Dublin-Heysham routes has "sent shock waves through the transport sector, with a potential knock-on impact on business and jobs".

"The association has had many calls from member companies concerned at the cancellation of the services and the impact it will have on their businesses," said Mark Fielding, chief executive of Isme. "Besides the significant inconvenience caused, the decision will reduce the level of competition on routes to Britain

and the continent, leading to higher charges for transport companies. It will reduce the capacity and choice, increasing costs for sea freight at a time when the country is heavily reliant on the export sector for future growth."

According to Isme, this latest issue to affect the transport sector comes on top of increased regulations and increasing costs as a result of carbon taxes and duties on fuel "which continue to strangle the industry".

"If we are serious about having a vibrant transport sector, capable of transporting goods for export at a competitive rate, it is incumbent on the administration to immediately introduce a comprehensive transport policy," said Fielding. "This policy should ensure that there is adequate capacity and no additional costs for transporting sea freight to our key markets in Britain and continental Europe."

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Dublin
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Shannon
Address: Unit J3 Smithstown Industrial Est,
Co Clare
City: Shannon
Phone: +353 61477855
Mail: info.shannon@kuehne-nagel.com

Cork
Address: Unit 7, O'Connell Campus,
Brooklodge, Glanmire
City: Cork
Phone: +353 21 2401000
Mail: info.cork@kuehne-nagel.com