

# MARKET UPDATE

**JANUARY 2023**



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# OUTLOOK & HEADLINES

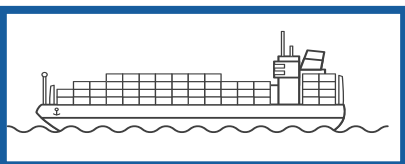
- **MARKET:** Trade is expected to grow slightly faster in 2023 than over the previous decade, despite forecast downgrades due to the war in Ukraine and slowing global economic growth.
- **MARKET:** Chinese factories potentially shutting 2 weeks early, ahead of Chinese New Year.
- **OCEAN:** Decreasing global box freight rates expected to return to normality within Q1.
- **OCEAN:** MSC reached the huge milestone of 1 million teu in secondhand ship purchases.
- **OCEAN:** Logistics firms predict a strained 2023 with record-low demand at Chinese factories and high number of blank sailings.
- **AIR:** Demand for air transport is down 8 per cent compared with the same period last year.
- **AIR:** The spread of Omicron in China will lead to short-term disruption.



# OUTLOOK & HEADLINES (CONTINUED)

- **WAREHOUSING & TRANSPORT:** Transport & storage business failures have risen by 14% due to the impact of the current climate.
- **WAREHOUSING & TRANSPORT:** Generation Logistics campaign continues to raise sector awareness aiming for a 25% increase of career opportunities alongside increasing sentiment by 40%.
- **EUROPEAN TRANSPORT:** French road hauliers using combined road-rail transport, are likely to suffer a cost increase of 15% to 20%.
- **ENVIRONMENTAL COMPLIANCE:** Free environmental review' gives you the chance to determine the most beneficial next step for your business.

## SUBJECT QUICKLINKS



OCEAN FREIGHT



AIR FREIGHT



WAREHOUSE & DISTRIBUTION



EUROPEAN ROADFREIGHT



ENVIRONMENTAL COMPLIANCE



## OCEAN FREIGHT GLOBAL MARKET OVERVIEW

### GLOBAL MARKET OVERVIEW

Container carriers calling at ports on time are improving as pandemic-related congestion has started to ease.

- Inflationary pressures are still causing concern despite the possibility that headline inflation in the US and Europe has peaked due to lower energy prices. Central banks continue to raise interest rates to rein in inflation although there are worries such action could plunge leading economies further into recession.
- Liner companies' guard against a hard landing is starting to crumble. Prices on long-term freight deals have fallen once again, show new figures from Xeneta. Carriers' protection against an economic slowdown is thus beginning to fall apart.
- Major container carriers have gotten better at calling at port on time as pandemic-related congestion has started to ease. On a monthly basis, analyst firm Sea-Intelligence monitors whether carriers are keeping their schedules.
- Obstacles in global box freight, having spiked rates and delays within recent years, is decreasing at such a pace that a return to normality is expected well within Q1 of next year.
- CMA CGM buys two container terminals in New York port area from Global Container Terminals worth upwards of US\$ 3 Billion.



# OCEAN FREIGHT GLOBAL MARKET OVERVIEW

## GLOBAL MARKET OVERVIEW CONTINUED

- Most of the world's major economies' PMIs are below 50%, which means the volume of goods will remain low until 2023.
- CMA CGM and two other major carriers are close to ordering a large number of new box vessels equipped to sail on green fuels, according to Alphaliner.
- What was agreed at this year's COP27 Climate Conference? For the first time countries agreed to establish a "loss and damage" fund - a pot of money to help poorer nations recover from the impacts of climate change, such as

destroyed homes, flooded land, or lost income from dried-out crops. No final agreement on fossil fuels was agreed however, but countries committed to "enhancing a clean energy mix, including low emission and renewable energy"

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### Felixstowe port workers agree a 2023 labour deal with Hutchison Ports.

- After a labour conflict lasting for months, port

workers in major UK port Felixstowe have reached an agreement about a 2023 labour deal with their employer, Hutchison Ports.

- The Federal Maritime Commission (FMC) intends to take a hard stance against container carriers, port terminal operators and other carriers if they are caught in retaliatory conduct against shippers who have filed complaints, says FMC Chair Daniel B. Maffei.
- Late December saw the EU agreed on a reform of the quota trade system, meaning shipping companies will have to pay for greenhouse gas emissions.





# OCEAN FREIGHT MARKET REGIONAL REVIEW & CARRIER OUTLOOK

## GLOBAL MARKET OVERVIEW CONTINUED

- Along with 20 companies, MSC, Maersk and CMA CGM, the world's three largest container carriers, are taking shots at Bimco for new legal climate clause deemed "unusable" and "detrimental". BIMCO is one of the largest of the international shipping associations representing shipowners. BIMCO states that its membership represents approximately 60 percent of the world's merchant shipping tonnage.
- Maersk to install video surveillance on ships to prevent harassment in US.
- Companies' wish list for future improvements is long after a fatiguing pandemic during which relationships between carriers and their customers were put to the test. Don't hesitate to get in touch with your Uniserve / UniOcean Lines expert to discuss your future wants and needs.
- Even though regionalisation or "nearshoring" are trending globally, Maersk chief exec Søren Skou doesn't expect it to have much impact on container carriers.
- Four carriers – including three leading players globally – dominate the list over the ten largest purchases within logistics in 2022, shows a poll compiled by Ti Insight's data and research platform, GSCi.
- Reduce, reuse, recycle! In a little over 2 years, MSC reached the huge milestone of 1 million teu in secondhand ship purchases.
- Brent Oil Prices hover around the mid US\$80's per barrel.





# OCEAN FREIGHT MARKET REGIONAL REVIEW & CARRIER OUTLOOK

## FAR EAST & SOUTH EAST ASIA OVERVIEW

- Whilst markets have largely reset when it comes to headline pricing, carriers will continue along the lines of their aggressive blank sailing programme. Our advice is to expect some disruption on the run up to Chinese New Year and beyond. Further market intel leads us to believe that many factories in China will be shutting 2 weeks early, ahead of Chinese New Year.
- Logistics firms predict a strained 2023 with record-low demand at Chinese factories and high number of blank sailings.
- The striking truck drivers in South Korea have been joined by one of the country's major labor unions, thus expanding the strike that continues to affect global supply chains.
- Softer demand is seeing various carriers continue with their aggressive pricing incentives. It is a strange strategy from the carriers, as they are also running role-pools due to their blank-sailing and strict tonnage controls.
- Honesty is the best policy; Singapore-based container liner ONE is all at sea when faced with interpreting box market developments, which have come to a standstill over the last few months following significant declines in both spot rates and demand.
- The cooled-down container market, having seen drops in both freight rates and demand throughout 2022, is now impacting shipowners, forcing them to accept returns of chartered vessels, writes Alphaliner.
- Where there's a will, there's a way; Shanghai, the world's biggest container port, is isolating the shipment of international goods to prevent disruptions to global exports as a Covid wave sweeps across China.





## OCEAN FREIGHT MARKET REGIONAL REVIEW & CARRIER OUTLOOK

### FAR EAST & SOUTH EAST ASIA OVERVIEW CONTINUED

- Car makers quietly cut ties to China. The pandemic and geopolitical concerns prompt car manufacturers to reduce Chinese dependency.
- Taiwanese container carrier Evergreen has received one of its 24,000-teu newbuilds four months ahead of schedule from Chinese shipbuilder.

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**Logistics firms predict  
a strained 2023 with  
record-low demand at  
Chinese factories and  
high number of blank  
sailings.**



# OCEAN FREIGHT MARKET REGIONAL REVIEW & CARRIER OUTLOOK

## INDIA SUBCONTINENT KEY OBSERVATIONS

- The 2023 outlook is more pessimistic than optimistic as the possibility of a global recession weighs on sentiment. Falling trade growth, tighter monetary controls and weakening consumer demand all point to a tougher start to the New Year for the container shipping sector. But there are some bright spots too – port congestion especially in Europe and North America has been eased, largely ending the supply chain bottlenecks and disruption of the last couple of years.
- Increased vessel space supply as a result of new vessels coming into service, weakened consumer demand, high inflation & high inventory levels will keep rates at lower levels for Q1,2023.
- Long-term rates are now falling, but now low enough to make shippers want to secure long-term contracts.
- Blanked sailings by carriers evolve as rates close in on carriers' breakeven point.
- The nominal and available fleets are set to increase as the huge amount of new tonnage ordered since Q4 2020 is delivered at an increasing pace through 2023 and 2024. Around 1.7m TEU to be delivered in 2023 and 2.5m more in 2024.
- Even with plenty of money in the bank, carriers will likely push for GRI implementation to get spot rates above their new breakeven level as we approach the Chinese New Year.
- Though some trades are still sticking out without the same dramatic falls in the spot market, carriers will not be able to keep certain trades so high above others when it comes to profitability. Capacity will chase higher profits, bringing rates on these trades back in line with the rest of the world. →
- With record-high freight rates for more than 2 years and historic disruption, the ocean transportation market has taken another 180-degree turn at the start of 2023.



## OCEAN FREIGHT MARKET REGIONAL REVIEW & CARRIER OUTLOOK

### INDIA SUBCONTINENT KEY OBSERVATIONS CONTINUED

- The Bangladesh Freight Forwarders Association has sought 100 acres of land in Chattogram Bay Terminal to construct a container freight station, which they say will speed up cargo delivery at Chattogram port. The association has Tk100 crore joint investment plan with Japan. The association said the container freight station – a large warehouse specializing in the consolidation and deconsolidation of cargo – will enable imported cargo delivery to factories from the port within just 24 hours. At present, delivery time takes more than 10 days, including

customs clearance. The container freight station, also known as a cargo distribution park, will be in a bonded area to which only air and sea freight forwarders will have access. The park will reduce both time and cost for cargo delivery from Chattogram seaport and airport.

- Businesses in Bangladesh including the apparel exporters are eager on using Colombo as a trans-shipment port again for exporting overseas if Sri Lanka can ensure

smooth services even as owing to the political and economic crises in the island nation earlier, many businesses in Bangladesh who used to ship via the Colombo Port preferred Singapore and India over Sri Lanka. Close to 40 per cent of Bangladesh's exports are shipped to overseas markets from Chittagong via Colombo Port while the remaining 60 per cent of export items are transported through Malaysia's Port Klang and Tanjung Pelepas or Singapore.





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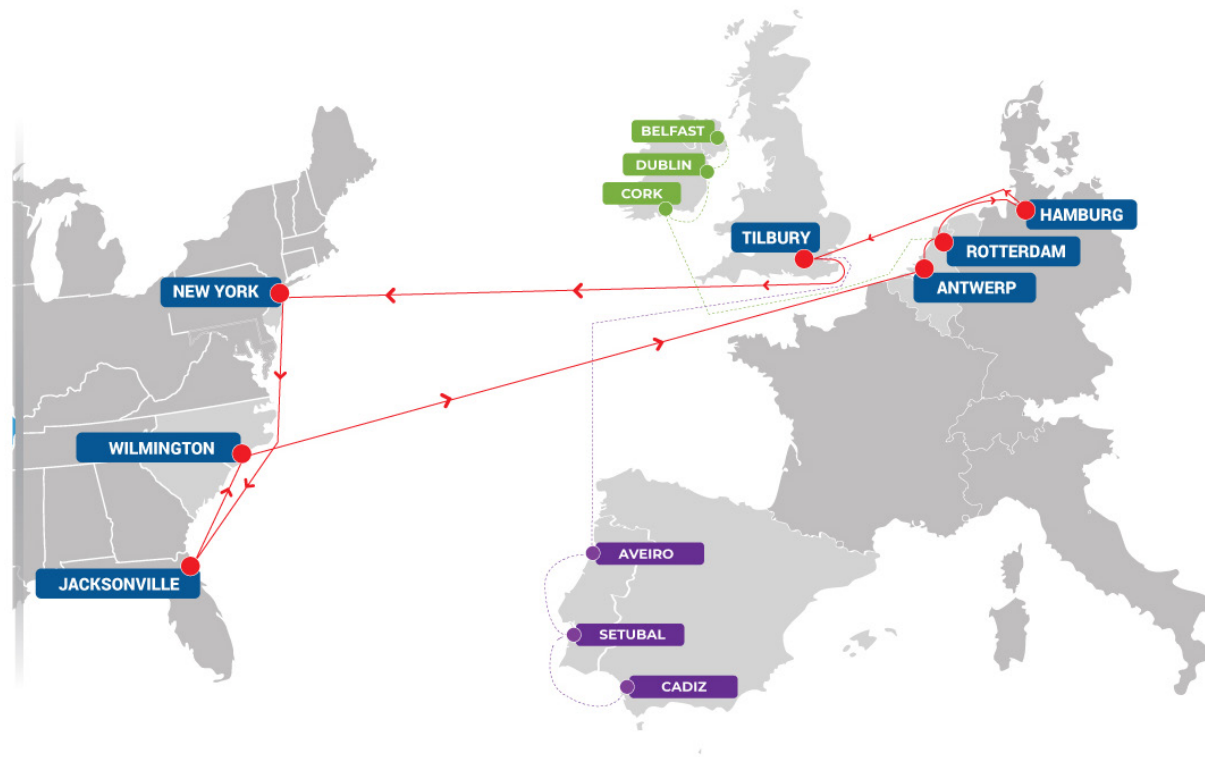
Fast transit times underpin the service and utilises non-congested ports and terminals, additionally it is the only direct service operating to and from Jacksonville.

### Service port rotation:

Antwerp (Belgium), Rotterdam (Netherlands), Hamburg (Germany), Tilbury (UK), New York (NY), Jacksonville (FL) and Wilmington (NC).

### Service features:

- Weekly service
- Only direct service to/from Jacksonville
- Fast and reliable transit times
- Utilising non congested ports and terminals
- Tailor made end to end solutions
- Fast & reliable transhipment options to/from Spain, Portugal and Ireland



To find out how a USX service can help your business, please contact your **Customer Development Manager** today on **01375 856060** or email **crmteam@ugroup.co.uk**



## AIR FREIGHT MARKET OVERVIEW & REGIONAL REVIEW

### FAR EAST & SOUTH EAST ASIA

Demand for air freight is expected to remain subdued in Q1 due to on-going cost of living challenges.

- As we step in to 2023 air freight rates are continuing a decline towards pre-COVID rate levels. China has been one of the last countries to encourage visitors, but with a relaxation of the zero tolerance policy on COVID, capacity is expected to come back as travel to and from the region increases. We should expect a few challenges as case numbers across the country inevitably increase as rules are eased, however, it seems there is a real ambition to open up for trade now.
- Chinese New Year is early this year, starting on 22nd January. Many factories are closing from next week, so we expect a short spike in demand from 9th through to 22nd.
- With the war in Ukraine approaching a yearlong in February, the impacts continue to affect some carrier routings, so this will restrict some routes and costs between East and West, although demand for air freight is expected to remain subdued in Q1 due to on-going cost of living challenges.
- Freight forwarders are reporting a mixed picture of the current supply chain situation in China as Covid restrictions lift, following recent protests against the government's pandemic policy. Latest developments →

# AIR FREIGHT MARKET OVERVIEW & REGIONAL REVIEW

## FAR EAST & SOUTH EAST ASIA CONTINUED

lead us to believe that China is having trouble containing the spread of Omicron, and obtaining real-time on the ground data is nigh on impossible. This will lead to short-term disruption, but the long-term view is more optimistic.

- Due to low demand in the market commercial flights have been canceled to reduce the supply imbalance. However, the low demand trend is expected to continue.
- China Southern Airlines Company Limited plans to list its subsidiary China Southern Air Logistics Company Limited on a stock exchange in mainland China.

- Air cargo pricing on some of the world's major trade lanes declined last month, bucking usual seasonal trends.
- Looking at market indicators for clues on where the market is heading, IATA said that new export orders, a leading indicator of cargo demand, are "shrinking in all markets except China and South Korea".
- Current air capacity is 12% lower than in November 2019, but 10% higher than in 2021.
- IAG Cargo is not currently considering any new freighter investments, according to its chief commercial officer.

**Commercial flight demand continues to drop resulting in flights being cancelled to reduce supply imbalance.**





## AIR FREIGHT MARKET UPDATE – REGIONAL REVIEW

### FAR EAST & SOUTH EAST ASIA CONTINUED

- **N. China:** Due to low demand in the market commercial flights have been canceled to reduce the supply imbalance. Rate levels have also dropped from the previous week; however, the low demand trend is expected to continue.
- **S. China:** Market rates remain at similar levels to last week. The Covid outbreak in the Guangzhou area continues to affect manufacturing operations, resulting in cargo output delays.
- **Taiwan:** There is a slight peak before the month's end, particularly to LAX and FEWB destinations.
- **SE Asia:** The overall export markets in Southeast Asia continue to be soft with rates either maintaining or dropping slightly from last week. In Vietnam, some factories have begun laying off staff or updating work schedules to rotations in order to save costs.
- Cathay Pacific Cargo customers will benefit from the return of belly capacity, but the air cargo market must still grapple with China's unstable supply chains going into 2023.
- Hi-tech customers including Microsoft and Apple increased volume to the US, Europe and Australia since the end of November which has affected airline utilization during the period. The recent optimisation of favourable travel policies in China has boosted confidence in the airline market, with a number of carriers stating that domestic passenger traffic is picking up and planning to increase capacity.

# AIR FREIGHT MARKET UPDATE – REGIONAL REVIEW

## INDIAN SUB-CONTINENT

- While indications are that there could be an easing of aggressive inflation-fighting interest rate hikes from early 2023, the risk of some economies falling into recession remains. Such a slowdown could affect demand for both passenger and cargo services.
- Cargo demand from ISC remains weak and this is expected to continue into Q1, 2023 due to a combination of high inventory levels and the likelihood of a global recession that could already be underway.
- In India Sub-Continent around this time last year, regular international flights remained

suspended. And this year, random Covid testing is in force for arriving international passengers as part of efforts to curb possible spread of infections amid a surge in cases in different parts of the world.

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**Cargo demand from ISC remains weak and this is expected to continue into Q1, 2023.**

- India has recorded 173 new coronavirus infections, while the active cases have declined to 2,670.
- International travellers from high-risk countries must mandatorily upload their RT-PCR report on Air Suvidha before arrival in India. Random testing of 2% international passengers arriving at all airports for COVID-19.





# AIR FREIGHT MARKET UPDATE – REGIONAL REVIEW

## INDIAN SUB-CONTINENT CONTINUED

- Mandatory pre-departure RT-PCR testing (to be conducted within 72 hrs prior to undertaking the journey) introduced for passengers in all international flights from China, Singapore, Hong Kong, South Korea, Thailand and Japan to India.
- Last year, Sri Lanka and the IMF agreed on a staff-level agreement to release USD 2.9 billion over 4 years. But the much-anticipated IMF bailout will have to wait as the country pursues talks with creditors to meet the global lender's condition for the facility. India and Sri Lanka held "successful" talks on debt restructuring and the country will also begin discussions with China, as it tries to get assurances from major bilateral creditors to close the crucial deal with the IMF.
- The Indian textile industry is very eager to see Free Trade Agreement (FTA) in place with the United Kingdom. Both India and the UK have indicated that they are working for early conclusion of FTA negotiations which is expected to get signed in the first half of 2023. Indian industry expects the FTA to provide a level-playing field with Bangladesh, which has duty-free access to the UK due to preferential treatment based on its Least Developed Country (LDC) status. Currently, Indian apparel exports to the UK attract around 10 per cent duty.



# WAREHOUSING & TRANSPORT UPDATE

## KEY TOPICS

- **Transport - Costs:** The RHA have recently published their annual Haulage Cost Movement report, revealing operating costs of a 44-tonne lorry have increased by 19%. The main contributors to these increases have been the cost of fuel, vehicles, labour and fuel additive partly as a result of the war in Ukraine.
- Food inflation sits at over 14% driven by the 39% increase in diesel costs and 86% increase in fuel additive. Vehicle costs are also impacted with limited availability and delays in production combined with the end of the UK Government Energy Bill Relief Scheme which ends in March 2023. These costs move down the supply chain directly impacting the cost of goods on the shelves.
- In a mid-year report circulated by The School of Marketing, transport and storage business failures have risen by 14% due to the impact of the current climate. With the UK haulage sector involved in transporting 89% of goods it is vital to understand just how vital road haulage is in keeping our economy moving.
- **Warehousing - Skills & Labour:** The logistics industry has faced many challenges over recent years, with experience retiring from the sector and a lack of uptake in attraction of new talent into businesses across the UK.
- Generation Logistics is now halfway through its 12-month campaign of raising awareness of the sector with targets set to create a 25% increase of awareness of career opportunities in the sector alongside increasing sentiment by 40%.
- With career development an increasingly important factor in choosing employment, it is vital UK businesses ensure visibility of the offering to potential candidates to attract the skills that the sector vitally needs.

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## WAREHOUSING & TRANSPORT UPDATE

### KEY TOPICS

- The market in the UK remains very volatile with numerous hauliers reporting a downturn in volume as a result of the struggling UK economy.
- As a result, in this downturn on volume the pressure to maintain transport rates grows yet, only last week the Road Haulage Association published figures that showed Hauliers have incurred a 19% increase in their operational costs over the last 12 months. Add to this a further increase of 5% on the cost of new trucks being quoted the outlook for Industry is bleak.
- Further challenges for the transport industry are looming as DVSA are reportedly putting out a warning of potential Strike action at their MOT testing stations, as well as HGV maintenance centres reporting staff shortages going into the New Year which will impact their ability to keep our trucks moving on the UK roads.
- James Kemball has 8 new trucks arriving early January all of which are coming equipped for hazardous cargo and will meet the Direct Vision Standards for central London.
- Haulage capacity is readily available across all ports in the UK and train/rail space is also available.



We are pleased to announce that our 750,000 sq ft Felixstowe Mega Distribution Centre (FMDC) has been awarded the British Retail Consortium (BRC) food safety AA rating.

The BRC Global Standard for Food Safety is one of the most recognised certification standards and provides organisations working in the food industry, or with food products, a framework for managing the safety, integrity and quality of products and services.

Receiving the AA rating, one of the highest ratings available, provides our customers with the reassurance that our processes and Felixstowe distribution centre are in compliance with the high standards set by BRC's framework.





# WAREHOUSING & TRANSPORT UPDATE

## KEY TOPICS

- **Demand:** For space across the UK and Europe has remained strong throughout 2022 and is set to continue into next year.
- The high demand for space is reflected in the average vacancy rate across Europe which sits at just under 2.3% and rents continuing to rise at a rapid rate, this combined with high development costs and a possible shortage of land for development are likely to cause constraints to supply.
- The warehouse market in the UK remains strong, levels of demand are likely to continue and outstrip supply for the foreseeable future.
- Pressure for space will continue as space is

used by companies moving from a “just in time” model of supply, stockpiling due to a lack of confidence in supply chains contributed to by the challenges with China, Brexit and on-going UK port strikes. All of this has led to an increase in on-hand inventory alongside near-shoring and a move to shorter supply chains all contributing to warehouse capacity demand.

- Challenges facing the sector include the pressure to decarbonise operations striving to become net zero by 2050 and increasing government pressure on companies to meet sustainability standards and the new UK business rates from April 2023. Costs for rates, labour and energy will continue impact the sector during 2023.

### Uniserve warehouse network – available space

#### Felixstowe Mega Distribution Centre (FMDC)

16,000 pallet spaces and mezzanine floor availability

#### Tilbury

7,800 pallet spaces & mezzanine floor availability

#### Chepstow

3,400 pallet spaces

#### Northampton

4,800 pallet spaces

#### Singapore

500 pallet spaces

For further details, please contact  
[T+WCommercial@ugroup.co.uk](mailto:T+WCommercial@ugroup.co.uk)





# EUROPEAN FREIGHT TRANSPORT MARKET UPDATE

## KEY TOPICS

### Iberian Shortsea service

- In December Uniserve has welcomed the first vessel on a brand new, dedicated, service from Spain and Portugal into Tilbury.
- The Kristin Schepers, an Ellerman City Liners vessel with a capacity of 800 containers, arrived at Tilbury port from Cadiz in Spain via calls in Portugal and at Teesport in the UK.
- The new routing includes port calls in Rotterdam, Cadiz, Setúbal, and Tilbury and will depart weekly in 2023.

- Uniserve's haulage fleet based at Tilbury, carry out customs formalities and nationwide deliveries.

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## No relief for France's rail freight and intermodal energy costs.

- The hike in energy prices is threatening the future of France's rail freight and intermodal operators, according to industry body Alliance 4F, who have slammed the government's

- "silence" in response to its demands for financial relief.
- The electricity bill paid by rail freight operators to SNCF Réseau, France's rail network manager in 2023, will have increased more than eight-fold, it said. During a meeting with French transport minister Clément Beaune last month, Alliance 4F called for a cap on the price of rail traction electricity and the exoneration of tolls paid by operators to SNCF Réseau for using the rail network, with the state picking up the tab.s CO2 than road transport. The lack of aid to the sector makes Alliance 4F doubt the government's commitment to decarbonising transport."

# EUROPEAN FREIGHT TRANSPORT MARKET UPDATE

## KEY TOPICS

- Alliance 4F added: Road hauliers using combined road-rail transport, are likely to suffer a cost increase of 15% to 20% if the issue is not addressed “In fact, with the market being unable to accommodate this level of increase, it is likely that intermodal freight flows will be halted, creating a shortage of capacity which road haulage could not absorb. “As an environmentally friendly and energy-saving mode, rail freight consumes six times less energy and emits nine times less CO2 than road transport. The lack of aid to the sector makes Alliance 4F doubt the government’s commitment to decarbonising transport.”

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**France has set itself the target of doubling its modal share of rail in freight transport to 18% by 2030.**



# CUSTOMS INSIGHTS: CHIEF TO CDS MIGRATION – ARE YOU READY FOR THE MOVE?

## KEY TOPICS

### CDS Migration

- **HMRC** has announced that the **exports deadline** for the **Customs Declaration Service (CDS)** is changing from 31 March 2023 to **30 November 2023**.
- Originally, all export declarations were needed to be made on CDS by 31 March 2023. The extended deadline has been decided by HMRC to help ensure businesses have enough time to prepare and the right level of support is put in place to manage export declarants' levels.
- If you have not already done so, you must carry out the following initial steps to prepare for CDS:
  - **Apply for an Economic Operator Registration and Identification (EORI) number** beginning with 'GB'
  - **Subscribe to CDS** so you will be able to submit export declarations from your software to CDS
  - Read the latest **CDS guidance** on GOV.UK – including the updated **CDS Toolkit** and **'Key differences between CHIEF and CDS'** guidance and our introductory **UK exports guide** – to familiarise yourself with CDS.
- HMRC have advised that they will provide further information about the timeline for CDS exports by the end of January 2023.
- As your compliance experts, we are committed to making the migration from CHIEF to CDS as smooth as possible for you, which is why we have compiled the following CHIEF to CDS Migration Guide **CLICK HERE TO DOWNLOAD.**

## COMPLY DIRECT OVERVIEW

### Looking to become a 'good for the planet' business in 2023?

**FREE WEBINAR | Your environmental workshop,  
becoming a 'good for the planet' business on Tuesday  
7th February at 10am**

The biggest question we get asked as an environmental compliance scheme & consultancy is 'where do we start', with the overwhelming requirements around legal legislation to growing consumer expectations, it can seem like burying your head in the sand is the best solution. During this webinar we wish to alleviate that grey cloud and share with you the best way to navigate becoming an environmentally conscious, good for the planet business.

**The key aims of this webinar include:**

- Provide an overview of the bigger picture, why being environmentally responsible matters?

- Discuss a range of avenues a business can take to best start or continue their sustainability journey, highlighting both obligatory and voluntary routes!
- Watch our solutions team in action as they provide service recommendations to example companies, based on specific criteria. This is a great opportunity to ask questions and get involved!

Following this webinar, you will get the chance to request a 'free environmental review' with a member of our solutions team, giving you the chance to determine the most beneficial next step for your business - [CLICK HERE TO REGISTER YOUR FREE PLACE!](#)





# uniserve

your **global** business

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