

Monday, 16 September 2019

1:00 — 5:00 PM

Port Productivity Workshop

Location: Saal 1-2

The IMO 2020 low-sulfur rule has produced an intensification of efforts to improve port and terminal productivity. The IHS Markit Port Productivity data set comprises port call data from ship operators that control 67 percent of the global fleet, and it covers 464 ports and 876 terminals worldwide. In 2017 and 2018, the data shows, average in-port time across all calls was 23.1 hours. A reduction of one hour per call would represent an efficiency improvement of less than 5 percent. Because higher productivity means less time in port and more time at sea for ships to sail at slower speeds, this modest reduction in port stay time equates to savings of up to \$500 million for ship operators, even before any appreciation in the price of fuel resulting from the low-sulfur rule.

The benefits of improved port and terminal productivity aren't limited to shipping lines. For port and terminal operators, a reduction of one hour per port call would create an additional 160,000 port hours of capacity, which would allow a further 7,240 port calls to be accommodated without any new capital expenditure. For shippers, improved productivity means fewer delays, reduced risk of congestion, and generally higher service reliability supporting more efficient and predictable container supply chain operations.

There is much room for improvement. The global port call data shows that as average vessel sizes and call sizes increase, port productivity is failing to keep pace, resulting in increased pressure on berth, yard, gate, and hinterland transportation networks. With the exception of the Middle East, all global regions experienced a decline in ocean-side port productivity weighted for growth call sizes in 2018 when compared with 2017. Achieving better productivity requires greater cooperation and collaboration between ship, port, and terminal operators to enhance process management and improve communication across all aspects of a port call.

The port productivity workshop is a half-day forum focused on achieving productivity improvements and involving all container port and terminal operations stakeholders. Attendees will have the opportunity to review and discuss the latest global, regional, and local trends in port productivity, revealed by the unique and extensive IHS Markit Port Productivity data set. Delegates can connect with carriers, ports, terminal operators, technology and equipment providers, and others in an interactive

MONDAY

TUESDAY

WEDNESDAY

environment designed to reveal best practices and opportunities for collaboration with carriers.

Workshop Leader

Turloch Mooney, Senior Editor, Global Ports, Maritime & Trade, IHS Markit

Panelists

Andreas Chrysostomou, CEO, Marine Fields

Francisco de los Santos, Chief Technology and Innovation Officer, Port of Algeiras

Evelyn Eggers, Director, Business Development, DAKOSY Datenkommunikationssystem

Erwin Hoefkens, Chief Commercial Officer, NxtPort

Chris Jones, CEO, Intelligent Cargo Systems

Andy Lane, Partner, CTI Consultancy

Capt. Ben van Scherpenzeel, Chairman, International Taskforce, Port Call Optimization

Guenter Schmidmeir, Senior Vice President, Automation Projects Division, Kalmar

Patrick Verhoeven, Managing Director, Policy & Strategy, International Association of Ports and Harbours

2:30 — 6:00 PM

Registration

Location: Saal 1-2 Foyer

3:00 — 5:00 PM

JOC Shipper Roundtable

Location: Saal 17-18

BY INVITATION ONLY FOR SHIPPERS.

This exclusive, shipper-only discussion facilitated by JOC Europe Editor Greg Knowler will bring together shippers in an off-the-record meeting to exchange ideas and potential solutions to the numerous challenges confronting stakeholders in the European supply chain. To reserve a spot, visit the registration desk.

Roundtable Leaders:

Greg Knowler, Senior Editor, Europe, JOC, Maritime & Trade, IHS Markit

Alan Murphy, CEO and Founder, Sea-Intelligence ApS

5:00 — 6:00 PM

Welcome Reception

Location: Saal 1-2 Foyer

Tuesday, 17 September 2019

8:00 AM — 5:00 PM

Registration

Location: Saal 1-2 Foyer

8:00 — 8:45 AM

Welcome Coffee and Tea

Location: Saal 1-2 Foyer

8:45 — 9:00 AM

Welcome Remarks

Location: Saal 1-2

Greg Knowler, Senior Editor, Europe, JOC, Maritime & Trade, IHS Markit
Stuart Strachan, Senior Vice President, Maritime & Trade, IHS Markit

9:00 — 9:45 AM

Keynote Address

Location: Saal 1-2

There is very little predictable in global supply chains at the moment, with Europe's shippers and their service providers having to navigate an environment governed increasingly by volatility in demand and pricing, disruptions from trade disputes, climate change, overcapacity, inland bottlenecks, digitalization, emissions targets, and the looming IMO 2020 low-sulfur regulations. In his keynote address, Marc Meier, managing partner and CEO of Hamburg-based Fr. Meyer's Sohn, will address the growing complexity of global container transport that he believes presents an opportunity for forwarders, but only if they can provide added value to shippers in a more transparent and data-driven supply chain.

Speaker Introduction

Greg Knowler, Senior Editor, Europe, JOC, Maritime & Trade, IHS Markit

Keynote Speaker

Marc Meier, Managing Partner and CEO, Fr. Meyer's Sohn

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9:45 — 10:15 AM

The Economic Outlook: What a European Slowdown Means for Freight Stakeholders

Location: Saal 1-2

Elevated uncertainty over the impact trade tariffs, falling manufacturing output, and the impact Brexit will have on Europe's major economies is extending a loss of business confidence in the eurozone. That pessimism has been routinely picked up this year in surveys by JOC Events parent company IHS Markit, which reveal concerns over tariffs imposed by the US on some of its major trading partners, including Europe, and fears that the punitive trade measures could be extended. Threats of US tariffs on foreign-made cars is of special concern for Europe, the world's largest car exporting region. Amid this uncertainty, IHS Markit Senior Principal Economist Diego Iscaro will review the economic trends and challenges affecting trade in this region and use the vast amount of data and analysis available to IHS Markit to outline what lies ahead.

Speaker Introduction

Greg Knowler, Senior Editor, Europe, JOC, Maritime & Trade, IHS Markit

Featured Speaker

Diego Iscaro, Senior Principal Economist, Economics and Country Risk, IHS Markit

10:15 — 10:45 AM

Networking Break

Location: Saal 1-2 Foyer

10:45 — 11:45 AM

Containerized Shipping Market: Analyzing the Outlook

Location: Saal 1-2

The US-driven trade war has added another element of volatility to the container shipping industry that is in a perennial struggle to balance capacity with demand. BIMCO believes weakness in the intra-Asia trade this year signals slowing export orders, with demand growth forecast to slow in the coming quarters. But not everyone shares this gloomy view. Leading the glass-half-full camp is Hapag-Lloyd CEO Rolf Habben Jansen, who expects global container volume will grow in line with market expectations of 4 percent and be supported by rising rates. This positive view is supported by the IHS Markit Trends in the World Economy and Trade report that predicts overall container volume growth will accelerate from 4 percent in 2018 to 4.8 percent this year, and 5.1 percent in 2020. Peak season on both Asia-Europe and the trans-Pacific is starting off slowly, but as 2018 showed, even with sometimes significant increases in volume,

without an accompanying rate rise there was no way to fully offset soaring bunker fuel prices. This session will examine the outlook for container shipping, its profitability, the capacity-demand balance, and the challenges specific to the different trade routes.

Session Chair

Mark Szakonyi, Executive Editor, JOC.com and The Journal of Commerce, Maritime & Trade, IHS Markit

Panelists

Rolf Habben Jansen, CEO, Hapag-Lloyd

Alan Murphy, CEO and Founder, Sea-Intelligence ApS

Peter Sand, Chief Shipping Analyst, BIMCO

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WEDNESDAY

11:45 AM — 12:30 PM

Asia-Europe: Time to Re-examine Contracting?

Location: Saal 1-2

Shippers and forwarders on the Asia-Europe trade will put out their tenders for 2020 business in the fourth quarter but contracting on the trade may take a very different form next year. The IMO 2020 low-sulfur fuel requirement deadline of Jan. 1, 2020 has left shippers in a state of suspended animation, unsure of whether to enter into annual contracts with all-in rates, keep the contracts shorter and hope to ride out any initial fuel price volatility, or maybe even go for multi-year contracts with the bunker adjustment factor (BAF) surcharge running separately. Maybe there will be greater use of the spot market that will push up spot rates. But whichever way shippers turn in 2020, it appears their container transportation budgets will be under severe pressure. This session will analyze the outlook in this critical trade, and why beneficial cargo owners are all re-evaluating contract terms with their carriers.

Session Chair

Greg Knowler, Senior Editor, Europe, JOC, Maritime & Trade, IHS Markit

Panelists

Patrik Berglund, CEO and Co-Founder, Xeneta

Andreas Bütfering, Senior Director, Trade Management Far East, Hapag-Lloyd

Peter Nielsen, Manager, Global Transport & Contracting, Bestseller A/S

René Reinholz, Head of Sales, Germany, Ocean Network Express (Europe)

12:30 — 1:30 PM

Networking Lunch

Location: Saal 1-2 Foyer (Seating available in Saal 4-6, 7-9)

1:30 — 2:30 PM

IMO 2020: Price, the Final Low-Sulfur Frontier

Location: Saal 1-2

Concerns over the supply of low-sulfur fuel once carriers begin complying with the IMO 2020 mandate are easing, with carriers and the oil majors insisting there will be no shortage in the run-up to the Jan. 1 deadline. Great uncertainty remains, however, around the price of low-sulfur fuel, a crucial factor for shippers as it will have a direct bearing on the bunker adjustment factor (BAF) formulas and the surcharges they will have to pay. There are price estimates to be found — currently around \$550 per ton — but those are speculative because there is no trading in low-sulfur fuel and therefore no benchmarks. So how will the price be determined? Will the price vary according to different types of low-sulfur fuel? What are the different fuel types within the low-sulfur segment? Should shippers prepare for a steep increase in their BAF surcharges? Should carriers hedge and lock in prices or take a chance on the floating market? Are carriers confident there will be no unexpected shortages? This panel will analyze these questions and more, as the deadline for implementation of IMO 2020 nears.

Session Chair

Peter Tirschwell, Vice President, Maritime & Trade, IHS Markit

Panelists

Lars Mikael Jensen, Head of North American Trades, Maersk Ocean, A.P. Moller - Maersk

Kai Miller, Strategic Pricing Models, Kuehne + Nagel

Tracy Vowel, Vice President, Business Development, Argus Media

2:30 — 3:15 PM

EU Maritime Regulation: Are We on Course?

Location: Saal 1-2

Port reforms, the consortia block exemption (BER) for container shipping, consolidation and alliances, emissions targets — these are all major European regulatory issues that have major consequences for shippers and for the entire transport chain. The issues are also grist for the commentary mill of Olaf Merk, whose strong views on maritime regulation are regularly espoused in research reports and position papers as the ports and shipping head of the International Transport Forum, and on various social media platforms. His forthright positions can evoke a strong response. For instance, Merk believes shippers would be better served by a container shipping industry required to operate under the same competition laws that govern other sectors and not enjoy any block exemption. A report he authored on the BER earlier this year prompted the World Shipping Council to question his data and call for the report to be “disregarded in its entirety” by the EC in its evaluation of whether to renew the BER or allow it to

lapse in April 2020. In this session, Merk will examine the European maritime regulatory environment and give his perspective on what it means for the container transport supply chain.

Session Chair

Greg Knowler, Senior Editor, Europe, JOC, Maritime & Trade, IHS Markit

Featured Speaker

Olaf Merk, Administrator, Ports and Shipping, International Transport Forum (ITF), Organisation for Economic Co-operation and Development

3:15 — 3:45 PM

Networking Break

Location: Saal 1-2 Foyer

3:45 — 4:30 PM

Smart Containers: High Visibility on the High Seas

Location: Saal 1-2

Although not widely deployed yet outside the reefer space, smart containers are attracting interest and attention because of the real-time information they can provide and, importantly, for the information they generate that can feed into tools promoting predictive analytics and other data-based intelligence. Traxens, a leader in developing smart containers that has investment from Mediterranean Shipping Co. and CMA CGM, says its very creation emerged from “the vision that the multimodal container industry could make huge gains in efficiency, service, and protection of the planet if every company and every person in the supply chain has the right information at the right time.” Traxens’ innovations focus on hardware to drive down the cost of deployment of container monitoring and software to foster scalable big data processing and secure partitioned distribution. But how much information on their containers do shippers and their forwarders really need? What are the cost implications for shippers of this box visibility, and should it be a value-added service provided by carriers? How far is shipping from an industry-wide deployment of smart dry containers?

Session Chair

Peter Tirschwell, Vice President, Maritime & Trade, IHS Markit

Panelists

Kathryn Delecluse, Smart Container Commercial Project Leader, Mediterranean Shipping Co.

Martin Dixon, Director and Head of Research Products, Drewry

Carl Lauron, Founder and CEO, BuyCo

Thomas Nouvian, Maritime Deputy Director, Maritime Business Unit, Traxens

4:30 — 5:30 PM

Concurrent Breakout Sessions

Port Community Systems: Breaking Out of the Silo

Location: Saal 1-2

Technology is playing an indelible role in shaping port operations, in terms of the interface between shipping lines and container terminals, as well as how container terminals interface with the hinterlands beyond their gates. Emergent technologies tend to focus on different aspects of this chain, but collectively they could help ports become more efficient by better coordinating ship calls, optimizing quay and yard operations, and connecting truckers with the terminals at the right time. This session will explore how the patchwork quilt of solutions might come together to improve port fluidity for shippers, their third-party logistics providers, and carriers.

Session Chair

Turloch Mooney, Senior Editor, Global Ports, JOC, Maritime & Trade, IHS Markit

Panelists

Nick Chubb, Founder and Director, Thetius

Ellen Naaijken, Senior Business Manager Shippers & Forwarders, Port of Rotterdam

Christian Roeloffs, CEO and Co-Founder, Container xChange

E-Commerce and the Ocean: It's a Forecasting Thing

Location: Saal 7-9

During 2018, a PostNord survey found that 268 million European consumers made online purchases worth 198 billion euro, an increase of almost 10 percent over the previous year. More importantly for those involved in global trade, three out of four of those purchases were made from foreign markets. Although there is no reliable data on the total cargo volume generated by the cross-border movements of goods ordered online and imported into Europe, the fact that so much ordering is made online means retailers must keep searching for ways to shift their e-commerce business from traditional and expensive package delivery by air to more affordable ocean transport. With its long lead time, container shipping obviously does not have a role in any rapid replenishment function, but with such growth being generated by e-commerce, there are cost savings to be unlocked by more proactive BCOs that are improving their sales and demand forecasting and taking the liner shipping option.

Session Chair

Eric Johnson, Senior Editor, Technology, JOC, Maritime & Trade, IHS Markit

Panelists

Frank Knoors, Founder and Managing Director, Logit One

Mark Kristensen, Co-Founder and Director, Con-Linq

Zvi Schreiber, CEO, Freightos

MONDAY

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5:30 — 7:00 PM

Networking Reception

Location: Saal 1-2 Foyer

Sponsored By Kuehne + Nagel

MONDAY

Wednesday, 18 September 2019

8:00 AM — 2:00 PM

Registration

Location: Saal 1-2 Foyer

TUESDAY

8:00 — 9:00 AM

Welcome Coffee

Location: Saal 1-2 Foyer

WEDNESDAY

9:00 — 9:05 AM

Welcome Remarks

Location: Saal 1-2

Greg Knowler, Senior Editor, Europe, JOC, Maritime & Trade, IHS Markit

9:05 — 9:45 AM

Day 2 Keynote Address

Location: Saal 1-2

The IMO 2020 low-sulfur mandate is necessarily aimed at how to reduce greenhouse gas emissions within the context of a fossil fuel fleet, but there are only so much additional emissions that can be wrung out of that model, says John Butler, president and CEO of the World Shipping Council. His message is that as fundamental a change as the low-sulfur requirement may be, the fact is that as long as shipping burns fossil fuel it will not be able to reach the zero-carbon goals set by the IMO. In this keynote address, Butler will explain this view and outline a proposal by the WSC that the IMO set up a maritime research program to help focus industry ideas and identify the fuel of the future and what that will mean for container shipping.

Speaker Introduction

Greg Knowler, Senior Editor, Europe, JOC, Maritime & Trade, IHS Markit

Keynote Speaker

John Butler, President and CEO, World Shipping Council

9:45 – 10:45 AM

Green Supply Chains: The Shipper's Choice

Location: Saal 1-2

The tools are available for shippers to measure the greenhouse gas emissions of their transportation providers, giving cargo owners a clear choice: ship dirty, or ship clean. With environmental regulations tightening and pressure mounting around social responsibility, taking the dirty route is no longer a viable option. For transportation service providers, this growing decarbonization momentum allows them to differentiate themselves, offering more sustainable services and giving customers verifiable and measurable emissions data. The market has various carbon offsets that service providers and shippers can buy, and while there is no compliance required yet in this area, it is surely not far off. At the moment much of the emissions management solutions are competitive add-ons, but how soon before they become standard? How reliable is the supply chain emissions data produced by carriers, and will it stand up to a challenge? Does the provision of that data come at a cost and is there a return on that investment for carriers and 3PLs? Should green costs be incorporated into the transport rates? Are shippers prepared to pay for greener services, and should they even have a choice? This session will analyze the increasing environmental pressure faced by all supply chain stakeholders and how they should adapt.

Session Chair

Greg Knowler, Senior Editor, Europe, JOC, Maritime & Trade, IHS Markit

Panelists

Kathrin Brost, Global Head of GoGreen and Customer Intelligence Program, DHL Global Forwarding

Jordi Espin, Policy Manager, Maritime Transport, European Shippers' Council

Angie Farrag-Thibault, Director, Collaborative Initiatives, Transport and Logistics, Clean Cargo Working Group, BSR

Pierre Garreau, Ph.D, CEO and Co-Founder, Searoutes

Urvesh Kotecha, Senior Trader, Shell Trading International

10:45 – 11:15 AM

Networking Coffee Break

Location: Saal 1-2 Foyer

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11:15 AM — 12:15 PM

View From the Top: A Conversation With Industry Leaders

Location: Saal 1-2

What is the perspective and outlook of industry leaders as we get deeper into 2019, a year that could prove to be pivotal for international logistics? As we look forward into 2020 and beyond, how do industry leaders see their segments of the industry evolving? Where are risks emerging in the European import and export supply chains? What will be the impact of regulatory mandates such as the IMO 2020 low-sulfur fuel regulation and the tough new European emission targets? In this session, we will have a lively discussion with a group of industry leaders about how they see the future unfolding in 2020 and beyond.

Session Chair

Greg Knowler, Senior Editor, Europe, JOC, Maritime & Trade, IHS Markit

Panelists

Jochen Gutschmidt, Global Freight Lead, Nestlé

Paolo Montrone, Senior Vice President and Head of Global Trades, Kuehne + Nagel

12:15 — 1:15 PM

Networking Lunch

Location: Saal 1-2 Foyer (Seating available in Saal 4-6, 7-9)

1:15 — 2:00 PM

Connecting Carriers: Blockchain and the Digital Container Shipping Association

Location: Saal 1-2

Creating value by controlling data within an integrated cargo network is the goal of container shipping companies as the world's largest carriers jump aboard new initiatives within the digital space. Mediterranean Shipping Co. and CMA CGM have joined Maersk in its TradeLens blockchain and visibility joint venture with IBM, alleviating fears that the project would not extend to the wider container shipping industry, while CMA CGM, Cosco Shipping, Cosco Shipping Ports, Hapag-Lloyd, Hutchison Ports, OOCL, the Port of Qingdao, PSA International, and Shanghai International Port Group have signed up with the Global Shipping Business Network. More carriers are investing in smart containers from Traxens, and most of the world's global carriers are now members of the Digital Container Shipping Association (DCSA), a group tasked with creating container data

standards for track-and-trace systems. The DCSA will enable carriers to address rising demand for such services while mitigating the higher cost of delivering to shippers and forwarder customers. This session will analyze the goals, objectives, and what beneficial cargo owners stand to gain from the digital movement.

Session Chair

Eric Johnson, Senior Editor, Technology, JOC, Maritime & Trade, IHS Markit

Panelist

Henning Schleyerbach, Chief Operating Officer, Digital Container Shipping Association

2:00 — 2:45 PM

Intermodal Crossroads: Navigating an Increasingly Complex European Network

Location: Saal 1-2

Data from Eurostat shows that half of all rail freight transported across Europe is intermodal cargo that has used more than one transportation mode, typically road in the first and last mile and rail covering the main part, but also through the use of barge and short-sea shipping. Intermodal is defined in Europe as combined transport, and in that segment, the latest data show that volume across the European Union grew more than 7 percent in 2017. In ton-kilometer terms, a more accurate measure of the business that avoids double counting of transshipment, the growth rate was more than 30 percent year over year. In Germany, the largest European rail market, intermodal volume grew 28 percent. This intermodal cargo is the only segment in the European rail freight market that is growing, driven by the more intelligent use of transport mix and the lower emissions that can be derived from greater use of rail over longer distances. Gateway ports in the northern range and across the Mediterranean also are expanding their inland reach, investing in supply chains to improve connections with their hinterlands as volume increases. This session, part of a two-part track looking at European inland distribution, will analyze the intermodal market, assess its allure to shippers, and explore the outlook.

Session Chair

Sebastian Reimann, Editor in Chief, DVZ

Panelists

Felix Heger, Vice President and Head of Ocean Freight + China Rail, DHL Global Forwarding

Alexander Nowroth, Co-Partner and Managing Partner, Lebenswerk Consulting

Harald Rotter, Managing Director, IGS Intermodal Container Logistics

Wolf-Jobst Siedler, Head of Railway Logistics and Telematics, Hamburg Port Authority

Sascha Treppte, Head of Business Development and Strategy, Duisport

2:45 — 3:30 PM

The Growing Role of Short-Sea Shipping

Location: Saal 1-2

Mounting overland transport challenges, the UK's imminent withdrawal from the European Union, and tightening regulations on CO2 emissions are driving up the popularity of short-sea shipping as part of a combined transport alternative to rail and road. Volume handled by short-sea operators increased in 2018 and has continued to grow through 2019. It is hardly surprising, considering the challenges facing land-based modes. Trucking is facing a chronic shortage of drivers, rail reliability remains poor, and it doesn't help that transport is the only sector of the European economy that has not reduced its CO2 emissions since 1990. So how are shippers and their service providers building short-sea shipping into their supply chains, and what are the cost benefits? Does it make sense to use short-sea options for Europe-UK cargo to avoid road congestion and customs delays after Brexit on Oct. 31? Join our panel of experts as they discuss the uncertainties that lie ahead in this second of our panels tackling intermodal transport in Europe.

Session Chair

Jolke Helbing, Project Director, Royal Haskoning

Panelists

Timm Ulrich Niebergall, Director Shortsea, Unifeeder A/S

3:30 PM

Closing Remarks

Location: Saal 1-2

Greg Knowler, Senior Editor, Europe, JOC, Maritime & Trade, IHS Markit

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