

TUESDAY, SEPTEMBER 137:30 AM – 5:00 PM **REGISTRATION***Location: Saal 1 – 2 Foyer*8:30 – 9:30 AM ☕ **WELCOME COFFEE***Location: Saal 1 – 2 Foyer*

9:30 – 10:00 AM

WELCOME REMARKS**SPEAKERS**

Peter Tirschwell, Senior Director, Content, IHS Maritime & Trade

Chris Brooks, Executive Editor, The Journal of Commerce and JOC Events, IHS Maritime & Trade

10:00 – 10:45 AM

KEYNOTE ADDRESS**INTRODUCED BY**

Peter Tirschwell, Senior Director, Content, IHS Maritime & Trade

SPEAKER

Rolf Habben Jansen, CEO, Hapag-Lloyd AG

10:45 – 11:45 AM

THE PATH AHEAD: AN ECONOMIC OVERVIEW

The global economy headed into the fall was looking somewhat brighter, with global GDP forecast to accelerate slightly in the final months of 2016 versus earlier in the year. But there will be headwinds. The U.K.'s June 23 vote to leave the European Union, for example, is expected to reduce global growth from 2.5 percent to 2.4 percent in 2016, and from 3.1 percent to 2.7 percent in 2017, according to IHS Markit. The eurozone's growth outlook has "weakened appreciably" following the vote, IHS Markit said, with real GDP now projected to be 1.5 percent in 2016, down from the company's previous forecast of 1.7 percent, and 1.1 percent in 2017, compared to 1.8 percent. What is the global economic picture for 2017? What will demand growth look like in 2017, and where will oil prices go? Two economists, from HSH Nordbank and IHS Markit, will offer

All sessions will take place in Saal 1-2.

their assessments at the beginning of the conference to help set the tone for the two days of discussion to follow.

SESSION CHAIR

Nicola Good, Executive Editor, IHS Fairplay, IHS Maritime & Trade

PANELISTS

Elisabeth Waelbroeck Rocha, Chief International Economist, IHS Markit Economics

Cyrus De La Rubia, Chief Economist, HSH Nordbank

11:45 AM – 12:45 PM

**THE WILD CONTAINER MARKET:
THE STATE OF PLAY AS 2016 LIMPS TO THE FINISH LINE**

By the end of the second quarter of 2016, the industry was immersed in a historic year of consolidation, with several mega-deals announced or in the process of being finalized, including CMA CGM/APL, Cosco/China Shipping and Hapag-Lloyd/UASC. The consolidation had reordered the east-west alliance structure with carriers deeply immersed during the summer of 2016 in re-mapping the new alliance services that will be announced in the fall and take effect in early 2017.

For shippers, this will represent perhaps the single biggest change in east-west services at one time in history. In the second quarter of 2016, some evidence pointed to a rate recover, with some believing pricing had hit bottom and would begin to rise. As of July 8, Asia-Europe spot rates had more than quadrupled in the past four months, to more than \$900 per TEU from just over \$200 on March 18. “The tide starts turning from now on,” Björn Klippel, CEO of Mannheim, Germany-based TIM Consult, told JOC.com in July. “When we look back to the market development a number of years from now, we will say it was the time when the (rate ebb) tide turned.”

With the EU dropping their antitrust investigation but carriers modifying how they announce rate increases, the Asia-Europe market will undergo further change. This session will present an overview of the state of play in the container industry and major trade lanes, such as Asia-Europe, and offer thoughts and analysis on its development into 2017.

SESSION CHAIR & PRESENTER

Jesper Praestensgaard, Senior Advisor, Boston Consulting Group, and Chairman, Unifeeder

PANELISTS

Jan Tiedemann, Senior Analyst, Liner Shipping and Ports, Alphaliner

Jens Rohweder, Managing Partner, Notos Group

All sessions will take place in Saal 1-2.

12:45 – 1:45 PM

LUNCH*Location: Saal 1 – 2 Foyer*

1:45 – 2:45 PM

RATE AGREEMENT STRATEGIES: BEST PRACTICES FOR BCOS

Rate agreements pertaining to European trades not connected to the U.S. are fluid, short term, and responsive to rapidly changing market conditions. The absence of a Federal Maritime Commission-like regulatory system requiring the filing of service contract amendments has created a fluid market for ocean freight reflecting the significant and growing volatility in Asia-Europe and other markets.

With the EU's trial requirement on carriers to announce GRIs 31 days in advance, how will the market be affected? Does market fluidity lead to questions about annual global tenders? How should BCOs approach direct carrier negotiations in this dynamic environment? What are the advantages of negotiating directly with carriers versus signing onto a forwarder contract? What is the optimal duration of rate agreements? Should they be tied to an independent index? How can working relationships with carriers be maintained during periods of intense rate volatility, which seems to be the status quo?

SESSION CHAIR & PRESENTER

 Chas Deller, Chairman and CEO, 10xOceanSolutions.com
PANELISTS

 Hans Bergwerff, Managing Director, Logfret

Andrew Gillespie, Director, Global Logistics, Ansell Ltd.

2:45 – 3:30 PM

**SCHEDULE RELIABILITY:
MANAGING YOUR SUPPLY CHAIN IN AN IMPERFECT DELIVERY CYCLE**

Schedule reliability continues to be a main concern of shippers despite indications that it's improving. According to Copenhagen-based liner shipping consultant SealIntel, the 34 lanes it tracks in its Global Liner Performance report showed that reliability improved on a global basis through 2015, "from the abysmal levels in the beginning of the year," driven primarily by the U.S. West Coast congestion. By the fourth quarter of 2015, the industry was setting record levels of reliability, likely driven by lower bunker costs that allowed carriers to speed up vessels to match schedules. On the other hand, the first quarter of 2016 started off weaker, down 5 to 7 percentage points from the previous quarter.

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For shippers, poor reliability – or the mere perception of it – is a daily challenge when managing supply chains ranging from retail to manufacturing. Poor reliability forces shippers to lengthen product lead times, with downstream impacts affecting not only transportation but also far-flung activities ranging from product design and raw materials procurement to scheduling of manufacturing and assembly operations. It also can impact cash flow, working capital as well as revenue and profits in the event of prolonged port disruption. What can carriers do to improve schedule reliability? How can improvements in cargo visibility be delivered so that shortcomings in schedule reliability can be managed effectively? This session will discuss these critical effects of carrier services and more.

INTRODUCED BY

Chris Brooks, Executive Editor, The Journal of Commerce and JOC Events, IHS Maritime & Trade

FEATURED SPEAKER

Alan Murphy, CEO and Partner, SeaIntel Maritime Intelligence

3:30 – 3:45 PM

 **NETWORKING BREAK**

Location: Saal 1 – 2 Foyer

SPONSORED BY: PORT OF MONTREAL

3:45 – 4:45 PM

CONTAINER SHIPPING DYNAMICS: THE SHIPOWNERS' VIEW

A highly relevant view of the container market comes from non-operating shipowners, those who charter container ships to container lines, many of which are based in Hamburg. Germans own 29 percent of the global container ship fleet, according to the Hamburg Shipbrokers Association. Although their source of revenue is charter rates paid by carriers, they have a long-term and all-encompassing perspective on the market that is relevant for all stakeholders, including beneficial cargo owners, carriers and forwarders. This session will present the perspectives on the current environment by this key market player.

SESSION CHAIR

Peter Tirschwell, Senior Director, Content, IHS Maritime & Trade

PANELISTS

Jan Willem Krutemeier, General Manager, Hammonia Reederei GmbH & Co.

Peter Eckhardt, Managing Partner, Martini Chartering

All sessions will take place in Saal 1-2.

4:45 – 5:45 PM

LONGSHORE LABOR: WHAT'S HAPPENING AT THE PORTS?

Dockworker strikes have hit ports in France and Portugal recently. The Swedish Dockworkers' Union launched a 24-hour strike at APM Terminals in Gothenburg on April 26. Dockworkers in Rotterdam, Europe's largest port, staged a 24-hour walkout on Jan. 7-8, the port's first strike in 13 years. They were protesting job losses at its new highly automated terminals; members of Dutch longshore union FNV Havens were reacting to contributing factors such as overcapacity at the port and a slowdown in trade from Asia. The European Transport Workers Federation (ETF), the BTB of Belgium, Ver.di of Germany and the CGT of France, as well as the International Transport Workers Federation supported the actions.

Marseilles-Fos says one reason it's growing faster than the average rate of growth at all European ports is because its labor disruption is a thing of the past. What's causing these issues? What's agitating the dockworkers, and where will this lead in the coming months and years? As shippers learned during the U.S. West Coast port labor disruption in late 2014 and early 2015, port disruption can have a significant impact on container supply chains. This panel will discuss these issues in depth.

SESSION CHAIR

Peter Tirschwell, Senior Director, Content, IHS Maritime & Trade

PANELISTS

Thomas Mendrzik, Chair, Works Council, HHLA Container Terminal Altenwerder, and Chair, Verdi Dockers Council, International Transport Workers Federation

Niek Stam, National Secretary, Dockers Section, FNV Havens

6:00 – 8:00 PM

● NETWORKING RECEPTION

Location: Ballin House, Hapag-Lloyd Headquarters

SPONSORED BY: HAPAG-LLOYD AG

All sessions will take place in Saal 1-2.

WEDNESDAY, SEPTEMBER 14

TUESDAY

8:00 AM – 2:30 PM **REGISTRATION**

Location: Saal 1 – 2 Foyer

8:15 – 9:00 AM  **WELCOME COFFEE**

Location: Saal 1 – 2 Foyer

9:00 – 9:15 AM

WELCOME REMARKS

SPEAKER

Peter Tirschwell, Senior Director, Content, IHS Maritime & Trade

9:15 – 9:45 AM

THE VIEW FROM GENEVA: A Q&A WITH MSC'S CAROLINE BECQUART

As senior vice president for Asia and head of vessel-sharing agreements for Mediterranean Shipping Co., Caroline Becquart is a successful and respected member of the MSC senior management team at the company's Geneva headquarters and a global leader in the container shipping industry. Having started her career as a trainee with the business in 1984, she now takes the lead on company strategy in the Asia-Pacific region, including all commercial operations and logistics activities, and she has been the driving force behind a number of large-scale commercial transactions. It was under her vision and leadership that MSC achieved exceptional growth when it first entered the Far East trades in 1996, resulting in the business taking its position as one of the world's leading shipping lines.

SESSION CHAIR

Peter Tirschwell, Senior Director, Content, IHS Maritime & Trade

FEATURED SPEAKER

Caroline Becquart, Senior Vice President of Asia Network and Vessel-Sharing Alliances, Mediterranean Shipping Co.

WEDNESDAY

All sessions will take place in Saal 1-2.

9:45 – 10:30 AM

INFRASTRUCTURE NEEDS FOR FUTURE GROWTH

The character of trade has changed dramatically. One percentage point of GDP growth no longer results in multiple percentage points of trade growth, as was the case in the past. What does this mean for container port capacity? What are future port infrastructure needs, and how should the industry achieve them? This presentation from Olaf Merk of the Organisation for Economic Co-operation and Development's International Transport Forum will analyze ITF-OECD research on predicted container port capacity needs in 2030 and discuss ways in which container terminal supply and demand could be better balanced.

INTRODUCED BY

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

FEATURED SPEAKER

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

10:30 – 11:30 AM

**OPERATIONAL EXCELLENCE:
WHAT CAN BCOS DO TO DRIVE DOWN COSTS?**

Shippers increasingly see opportunities through operational excellence to lower the cost of their day-to-day interactions with container carriers. But some carriers are well ahead in systems integration, offering quality integration that achieves shippers' sought-after efficiencies and cost reductions. Although shippers have experienced substantial cost savings over the past year as ocean container rates have significantly weakened due to overcapacity, there remain incremental – and more durable – cost saving opportunities achieved through operational excellence. One possible solution is better efficiency around equipment planning and positioning, while other opportunities can be found in information technology innovation. This session will explore.

SESSION CHAIR

Björn Klippel, CEO, TIM Consult

PANELISTS

Berit Hagerstrand-Avall, Vice President, Sea Services, Stora Enso AB

Alexander Naumann, Senior Vice President and Head of Ocean Freight Germany, DHL

All sessions will take place in Saal 1-2.

11:30 AM – 12:30 PM

**A MEDITERRANEAN GATEWAY INTO EUROPE:
FINALLY BECOMING A REALITY?**

For decades, Mediterranean ports had virtually no ability to serve as gateways for cargo headed into southern Germany or other regions in the European interior. Adequate port infrastructure and efficient access to the hinterland were lacking. That's finally changing, with shippers beginning to achieve a seven- to 10-day reduction in ocean transit times to and from Asia, supported by modern port facilities with deep water and upgraded road and rail facilities. In early May, Bavaria Prime Minister Horst Seehofer visited the North Adriatic region and declared that its ports, including Trieste, should be considered much more for Bavarian trade. As one headline said, "Bavaria Prefers Trieste to Hamburg."

With bigger vessels causing more congestion in North Europe, and ports and hinterland facilities more than competitive, a dinosaur is stirring and soon may be awakened. Analysts, for example, see Trieste and Koper as having viable hinterland access via road and rail with minimal impact from the Alps. But other ports, including Genoa, La Spezia and Venice, are making a case as gateways accessing the interior, challenging the dominance of the much larger and more established Northern European port range. Under its One Belt, One Road initiative, China is increasingly focusing on Mediterranean and Adriatic ports, including Venice.

Separately, huge infrastructure projects such as the new 57-kilometer-long Gotthard rail tunnel in Switzerland, opening in June, will push this trend toward more southbound traffic. This session will take a close look at how the Mediterranean is developing as an emerging container cargo gateway into and out of Europe.

SESSION CHAIR

Peter Tirschwell, Senior Director, Content, IHS Maritime & Trade

PANELISTS

Daniele Testi, Group Marketing Director, Contship Italia

Jolke A. Helbing, Director, Royal HaskoningDHV/Ocean Shipping Consultants

Santiago G. Mila, Deputy Executive Director, Port of Barcelona, and Deputy General Manager, Barcelona Port Authority

All sessions will take place in Saal 1-2.

12:30 – 1:30 PM

 **LUNCH***Location: Saal 1 – 2 Foyer*

1:30 – 2:30 PM

**ASIA-EUROPE CONTAINER RAIL:
FINDING ADVANTAGES FOR SHIPPERS**

As shippers shifted cargo from air to ocean and as slow-steaming by container lines became the new normal, a rail market opened up to move cargo between Asia and Europe. It's still tiny, representing 1 percent of the Asia-Europe market, but volumes are growing. Container volume through Kazakhstan, for example, soared 34 percent year-over-year to 47,000 TEUs in 2014. As service reliability across central Asia and Russia improves, several forwarders, including Geodis Wilson, DB Schenker, UPS and DHL are jumping in, and services are now offered for full and partial container loads.

DHL Global Forwarding runs a daily service from Shanghai, Tianjin or Qingdao that runs along the Trans-Siberian Railway's northern corridor to Europe. Transit times have dropped dramatically, with goods moving from eastern China to Europe's borders in just 12 days, compared to 30 to 40 days on the water. If the chargeable weight in a 40 foot container is about 9,600 kilograms, one estimate is that the price charged to customers for rail was \$8,000 per FEU, \$3,000 via ocean freight, and approximately \$37,000 by air, (at \$3.85 per kilogram). Rates have since declined since that estimate was made, but it shows how rail may be a viable option for certain shippers moving goods in either direction between Asia and Europe. Experts will discuss this trend and the opportunities that may exist for certain shippers.

SESSION CHAIR

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

 Dr. Volker Simmering, Managing Director, Paribus Capital GmbH

Felix Heger, Vice President and Head of Ocean Freight Europe, DHL Global Forwarding

All sessions will take place in Saal 1-2.

2:30 – 3:30 PM

DIGITAL INNOVATION: WHAT DOES IT MEAN FOR SHIPPING?

Digital innovation is coming to the container shipping world, and it has the potential to significantly change how business is done. There already are multiple examples of how the internet is altering business practices, but arguably what we’re seeing today is just the beginning of what could be a massive transformation. Internet-based forwarders are creating Expedia-like platforms for booking ocean freight; tracking devices to monitor containers are coming down in price, allowing for startups such as Traxens, funded by CMA CGM and MSC, to potentially revolutionize real-time, at-sea track and trace. Data on container shipments increasingly exists in the cloud, enabling it to be sliced and diced to unlock incremental, unprecedented levels of value. Given the rampant inefficiency that exists throughout the international container supply chain — whether in the form of ship or cargo delays, under-utilization of terminals and other assets, and excessive inventory levels due to mandatory buffer stocks — the opportunities for shippers, carriers, forwarders and others is extraordinary. This panel will present cutting-edge thinking on how digitization has begun transforming the container supply chain.

SESSION CHAIR

Kai Miller, Consultant, IHS Maritime & Trade

PANELISTS

Michel Fallah, CEO, Traxens

Gion-Otto Presser-Velder, Chief Logistics Officer, Rocket Internet SE

Zvi Schreiber, CEO, Freightos

Johannes Schlingmeier, Head of BCG xChange, Boston Consulting Group

3:30 PM

CLOSING REMARKS

All sessions will take place in Saal 1-2.