

MONDAY, SEPTEMBER 18

DAY 1 — DRILLING DOWN

Day 1 of the JOC Container Trade Europe Conference will offer an industry-specific track of concurrent sessions that analyse the unique challenges and issues confronting shippers and service providers — including retail, automotive, chemicals, and forest products. A combination of macroeconomic analysis, exclusive workshops, and real-life examples will offer attendees a deep-dive examination of today's challenges and potential solutions from the industry's most authoritative experts.

12:00 PM-5:00 PM

REGISTRATION

Location: Saal 1 - 2 Foyer

12:30-1:30 PM

WELCOME LUNCH

Location: Saal 1 - 2 Foyer



We want you to be involved in the conference, so please ask questions using the microphones in the room. You also can submit questions via our online question and answer facility. You can post your questions anonymously at:

www.sli.do

Event Code: #CTE2017

Follow on Twitter: #CTE2017

1:30-2:30 PM

SESSION I: RETAIL*Location: Saal 1*

With the retail sector never as competitive as it is today, the international supply chain is confronting heavy demands to support the pressures retailers face. Given rapid and unpredictable changes in consumer preferences, lead times and transit times are under heavy pressure, with little tolerance for rolling of cargo by ocean carriers, port delays, or inconsistent transit times. That often means finding the right rate level and contract terms that guarantee capacity and allocations and ensure cargoes aren't subject to discrimination by carriers in transit. It also means finding the right formula regarding origin consolidation, destination de-consolidation, and managing increasingly multi channel supply chains, while achieving robust visibility that allows for maximum control over cargo in transit.

SESSION CHAIR & PRESENTER

Chas Deller, Consultant, Drewry Supply Chain Advisors

1:30-2:30 PM

SESSION II: CHEMICALS*Location: Saal 7 - 10*

Chemicals customers are highly demanding due to the toxic, dangerous, and heavily regulated nature of their cargoes. The high-volume, non-seasonal nature of their cargo flows requires access to consistent ocean capacity. Their cargo must move under the strictest environmental and safety regulations. They demand error-free compliance with hazardous materials regulations, robust end-to-end cargo visibility, environmental responsibility, and assurance that cargo remains safe and secure throughout transits. Chemical customers seek an ocean network that is integrated into their global networks and sourcing activities directed from headquarters to create global transportation sourcing and execution.

SESSION CHAIR

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

PANELISTS

Yves Letange, Managing Director, Europe, Turkey and North Africa, BDP International NV

Rien de Bil, Logistics Procurement Director, Hexion B.V.

Alejandro Parodi, Logistics Procurement Manager-EMEA, Eastman Chemical Co.

2:30-3:30 PM

SESSION III: PHARMA AND HEALTHCARE

Location: Saal 7 - 10

Pharmaceutical shippers are probably the most demanding ocean shipping customers. Given the unique nature of their product, they have no tolerance or appetite for risk. They tolerate no deviation from internal container temperatures and atmosphere, and demand the highest levels of container security, integrity, and visibility. For years, pharma shippers had such little confidence in ocean shipping that they simply wouldn't use it. Standards have improved and risk has declined, however, so pharma is a growing segment of business for forwarders and carriers, and that's allowed shippers to reduce transportation costs substantially. Customers require fully compliant forwarder facilities and equipment, highly trained forwarder staff to ensure end-to-end safety, integrity, and regulatory compliance based on standard operating procedures, and a high degree of confidence in on-time arrival of shipments.

SESSION CHAIR

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

PANELISTS

Felix Heger, Vice President and Head of Ocean Freight and China Rail Europe, DHL Global Forwarding
Daniel Piotrowski, Director, European Reefer Trade, OOCL (Europe) Ltd

2:30-3:30 PM

SESSION IV: AUTOMOTIVE

Location: Saal 1

Automotive customers, including Tier 1 suppliers, require a high degree of reliability, especially around transit times and port throughput, to ensure that production delays are avoided consistently. They also require a high degree of visibility, consolidation of products from multiple suppliers, and active, hands-on management of incoming goods to ensure lead times are met and production lines are consistently supplied with just-in-time and just-in-sequence services.

SESSION CHAIR

Mark Szakonyi, Executive Editor, JOC.com, Maritime & Trade, IHS Markit

PANELISTS

Mario Franjčević, Senior Analyst, EMEA Light Vehicle Production Forecast & Analysis, IHS Markit
Joachim Wuest, Head of Automotive Sales, Germany, DHL Global Forwarding

3:30-4:00 PM



NETWORKING COFFEE BREAK

Location: Saal 1 - 2 Foyer

4:00-5:00 PM

SESSION V: FOREST PRODUCTS*Location: Saal 7 - 10*

Forest products are often high volume, relatively low value commodities that face their own unique challenges in the ocean container environment. Key challenges for forest products shippers include container availability, capacity out of key ports, and keeping damage in transit to a minimum. Other challenges include shifting priorities of ocean carriers. Forest products shippers also focus heavily on process innovation to reduce costs, including freight-related expenses but just as importantly through achieving efficiencies to reduce documentation and other shipment processing. This requires access to the full range of ocean carriers to maximise available capacity, state-of-the art order management systems, and cargo visibility.

SESSION CHAIR

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

PANELISTS

Nils Kahn, Chief Commercial Officer and Deputy Director, MSC Germany, MSC Mediterranean Shipping Company

Marc Meier, CEO, Fr. Meyer's Sohn

4:00-5:00 PM

SESSION VI: APPAREL AND FASHION*Location: Saal 1*

The fast-moving pace of apparel/fashion logistics through the ocean supply chain requires the highest standards of reliability, speed, and visibility. When moving by ocean, fashion goods are least tolerant of delays, because rapidly evolving consumer preferences mean the value of the industry's products erodes rapidly when they arrive late to market. Services required include vendor management and origin consolidation; garments on hanger; cross-docking; deconsolidation; direct to store and DC bypass; and customs and duty management.

SESSION CHAIR

Mark Szakonyi, Executive Editor, JOC.com, Maritime & Trade, IHS Markit

PANELISTS

Fabio Nocentini, Executive Vice President, Savino Del Bene SpA

Jane Singer, Director and Head of Market Intelligence, Inside Fashion

5:00-6:00 PM

 NETWORKING RECEPTION*Location: Saal 1 - 2 Foyer*

TUESDAY, SEPTEMBER 19

DAY 2 — THE MAIN EVENT

If Monday afternoon was the hors d'oeuvre, Tuesday is the main course. Starting with an informative and forward-looking keynote address, Day 2 of the JOC Container Trade Europe Conference will get to the heart of the issues confronting shippers and their transportation service providers through a mix of single speakers, round-table-type discussions and formal presentations.

8:00 AM- 5:00 PM

REGISTRATION

Location: Saal 1 - 2 Foyer

8:00-9:00 AM



WELCOME COFFEE

Location: Saal 1 - 2 Foyer

9:00-9:15 AM

WELCOME REMARKS

Location: Saal 1 - 2

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

Chris Brooks, Executive Editor, JOC Events, IHS Maritime & Trade

9:15-10:00 AM

KEYNOTE ADDRESS

Location: Saal 1 - 2

INTRODUCED BY

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

KEYNOTE SPEAKER

Otto Schacht, Executive Vice President of Global Sea Logistics, Kuehne + Nagel International AG

10:00-11:15 AM

TAKING STOCK: ANALYSING THE ECONOMIC AND CONTAINERISED TRADE OUTLOOK

Location: Saal 1 - 2

Following a historic year of ocean carrier M&A, failures and restructuring, shippers are confronting sweeping, in some cases, unprecedented changes. Although market uncertainty may be the new normal, one thing is sure: The combinations of CMA CGM and APL, Cosco and China Shipping, Hapag-Lloyd and United Arab Shipping Co., the acquisition of Hamburg Sud by Maersk, and the coming merger of the three largest Japanese carriers have altered the playing field for shippers. Restructured alliances that launched on April 1 have narrowed carrier choices and altered the operational structure throughout the containerised supply chain, just as the economy and global trade are accelerating at a pace not seen since the post-recession year of 2010. That's led to a stronger rate environment in the main east-west trades, and put ocean carriers on track for their best year in half a decade. In the Asia-Europe trade, for example, OOCL in late July reported a year-over-year surge of 22 percent in volume and nearly 50 percent in revenue for the first half of 2017, and research analyst Sealntel said carriers stood to gain billions of dollars in higher rate levels compared with the past two years. This session will analyse the state of the container shipping industry as the fourth quarter of the year begins and the peak shipping season reaches its apex. Among the questions it will address are: What is the outlook for the European economy and its key trading partners? How do carriers view the state of their industry? What does container shipping supply-demand look like as 2018 approaches?

SESSION CHAIR

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

PANELISTS

Rolf Habben Jansen, CEO, Hapag-Lloyd

Philip Damas, Director, Drewry Supply Chain Advisors

Elisabeth Waelbroeck-Rocha, Chief International Economist, IHS Markit

11:15-11:30 AM

NETWORKING COFFEE BREAK

Location: Saal 1 - 2 Foyer

11:30 AM-12:30 PM

ASIA-EUROPE: THE CHANGING DYNAMICS OF THE WORLD'S LARGEST CONTAINER TRADE

Location: Saal 1 - 2

Whereas the westbound Asia-to-Europe lane was the head-haul for the past 20 years or more, growth is now faster on the eastbound Europe-to-Asia route and the question of which trade is the head-haul and which is the backhaul is has become murky. With capacity impacted in the wake of the reshuffling of global alliances earlier this year, 2017 has been a challenging year for companies exporting out of Europe while for carriers higher rates are pointing to a recovery that carrier executives say is already under way and will become even more visible as the year goes on. This session will examine the rapidly changing nature of the world's largest containerized trade lane.

SESSION CHAIR

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

PANELISTS

Peter Webber, Director and Secretary, Container Trades Statistics

Johan Sigsgaard, Head of Europe Services, Maersk Line

Dominique von Orelli, Senior Vice President, Global Head of FCL Product & Capacity Management, DHL Global Forwarding

12:30-1:30 PM

NETWORKING LUNCH

Location: Saal 1 - 2 Foyer

1:30-2:30 PM

ASIA-EUROPE RAIL: WHY THE INTERCONTINENTAL LANDBRIDGE IS HEATING UP

Location: Saal 1 - 2

From a standing start in 2013, Europe-Asia rail is at a full gallop. Rail freight volumes between Germany and Asia increased tenfold in just one year, according to forwarders. As of May, there were 53 trains running into Europe each week and 23 trains headed back to Asia, with eastbound volumes growing steadily. Westbound transit times are 12 to 18 days,

while eastbound transits are 11 to 17 days. Origin cities in China are Changsha, Chengdu, Chongqing, Hefei, Shenyang, Suzhou, Wuhan, Yiwu, and Zhengzhou. Destination cities are Duisburg, Hamburg, Lodz, Lyon, Nurnberg, Tilburg, and Warsaw, with a further service into London. It is a showcase project of the Chinese One Belt, One Road initiative that is beginning to build significant volumes in the Asia-Europe trade. As an example of how rail is expanding its reach, less-than-container load shipments are expanding rapidly in both directions on the China-Europe rail trades, opening the routes to a much wider customer base. Last year, 40,000 containers moved by train between Asia and Europe, according to DB Schenker, which expects volume to increase to more than 100,000 containers by 2020. Other estimates put potential 2020 volumes at 500,000 FEUs. Growth is so robust, in fact, that concern is growing that congestion at key points, such as rail gauge change stops, soon could become an issue. This session will explore the current state of play in Asia-Europe rail with leading figures involved in all aspects of the services.

SESSION CHAIR

Mark Szakonyi, Executive Editor, JOC.com, Maritime & Trade, IHS Markit

PANELISTS

Kenneth C. Asztalos, Vice President, Rail and Intermodal, AFMS Logistics Management Group

Igor Tambaca, President and Founder, Rail Bridge Cargo (RBC)

Peter Odintsov, President, Hansa Global Advisors

Henk de Bruin, EMEA Logistics Business Management Manager, HP

2:30-3:30 PM

THE TRANS-ATLANTIC: ANALYSING A CHANGING TRADE

Location: Saal 1 - 2

Although freight rates remain very low, growth is picking up significantly this year on the trans-Atlantic while the market adjusts to new realities such as the EU crackdown on public GRI announcements. IHS Markit is forecasting head-haul Europe-to-US volumes will rise 9.6 percent in 2017 versus just 1.4 percent growth in 2016, while the backhaul US-to-Europe leg is expected to increase 3.2 percent, triple the pace of 0.9 percent a year earlier. Slightly faster European growth this year helps explain the eastbound jump while the US is still in its lengthy expansion. Other positive developments could be a possible revival of the Transatlantic Trade and Investment Partnership, which the US hasn't officially withdrawn from. The strength of the dollar is hurting US exports and driving eastbound Transatlantic spot rates to well less than \$100 per container, according to NVOCCs. At the same time, the trans-Atlantic from a logistics flow perspective is adjusting to the implementation of new

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alliances in April and mega-ships transiting the expanded Panama Canal calling at US East Coast ports and creating larger cargo surges. This session will dive into the major moving parts of this important market. Under new EU antitrust guidelines, carriers can no longer publicly announce GRIs but rather communicate rate increases individually to shippers and NVOCCs, which has changed how pricing develops in this market.

SESSION CHAIR & PRESENTER

James I. Newsome III, President and CEO, South Carolina Ports Authority

PANELISTS

Thilo Trusch, Senior Director of Trade Management, Atlantic, Hapag-Lloyd

Martijn van der Zweth, Procurement Manager, Famous Pacific Shipping Rotterdam

3:30-4:00 PM



NETWORKING COFFEE BREAK

Location: Saal 1 - 2 Foyer

4:00-4:30 PM

EUROPEAN LONGSHORE LABOUR: A GROWING ISSUE FOR SHIPPERS

Location: Saal 1 - 2

The 18-month longshore labour standoff at the Port of Gothenburg led Atlantic Container Line to threaten to leave the port after 50 years of continuous service, prompted APM Terminals to impose a partial lockout, and spurred Maersk Line and Safmarine to stop accepting bookings. But the situation in Sweden is just one of many disruptive longshore labour scenarios playing out across Europe that could have a big impact on shippers' ocean container supply chains. Among the issues affecting European longshore labour relations are safety at ports, the breakdown of existing labour pool monopolies, the effects of automation/digitalisation/robotisation on ports and employment, and the EU social agenda. This session will offer a forward-looking analysis of where longshore labour relations are headed in Europe and how shippers need to prepare.

INTRODUCED BY

Nicholas Savvides, Markets Editor, Fairplay, Maritime & Trade, IHS Markit

PANELIST

Ruud van der Wel, Head of Global Labour Relations, APM Terminals

4:30-5:30 PM

THE DIGITAL FUTURE: HOW REAL IS IT AND HOW WILL IT UNFOLD?

Location: Saal 1 - 2

Shipping is but one of many industries that has come under the spell of digitization, with the impact so far being more negative in the form of effective cyber attacks than positive in terms of cost savings or efficiency gains. We know that multiple startups in the form of “digital forwarders” or “online marketplaces” have sprung into existence over the past few years, backed by hundreds of millions in venture financing and attracting talented technologists into the industry. We know that carriers such as Maersk Line and CMA CGM are seeking to transform themselves from legacy shipping companies into some form of digital enterprise following the GE model, but must do so in a way that protects their systems from cyber attack, case in point being the Petya attack on Maersk in late June and early July. We know that legacy middlemen that add little value feeling increasingly nervous while full service forwarders dismiss the upstarts as lacking experience and an on-the-ground global network. But these are still early days. Maersk CEO Soren Skou told investors in May that its digital initiatives “are not doing anything other than adding expenses” but the intent is to improve the customer experience and lower cost. Where is all this headed? This panel discussion will go into great depth on this and other questions

SESSION CHAIR

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

PANELISTS

Michael Wax, Co-Founder and Chief Operating Officer, FreightHub GmbH

Thorsten Meincke, Senior Vice President, Global Seafreight, Kuehne + Nagel

Steven Jan van Hengel, Senior Business Manager, Shippers and Forwarders, Port of Rotterdam

5:30-7:00 PM

 **NETWORKING RECEPTION**

Location: Saal 1 - 2 Foyer

WEDNESDAY, SEPTEMBER 20

DAY 3 — THE HOMESTRETCH

The 2017 Container Trade Europe will cap off three days of critical content with a series of case studies that examine how shippers, working with their transportation and other service providers, are working to resolve disruption in their global supply chains.

8:30-11:00 AM

REGISTRATION

Location: Saal 1 - 2 Foyer

8:30-9:00 AM

NETWORKING COFFEE BREAK

Location: Saal 1 - 2 Foyer

9:00-10:00 AM

CONCURRENT CASE STUDY: NYSHEX, A NEW WAY FORWARD FOR CONTRACTING

Location: Saal 1 - 2

Container shipping has been correctly described as an industry that destroys value rather than creating it. The volatile market in which carriers have little to no control over pricing means they have limited ability to create value for customers through enhanced levels of service. When a quarter of booked containers fail to show up for loading with no consequences to the shipper, there is something dreadfully wrong with the way the industry functions. The same can be said for cargo that does show up on time, yet is rolled to a later sailing. Is there a different way? How does an industry expect to change after it has been stuck in its ways for so many years? A promising new initiative called the New York Shipping Exchange, or NYSHEX, is building support around a new slot exchange concept that has gained the support of carriers, beneficial cargo owners, and forwarders in an attempt to

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address these core issues of dysfunctional. Participants will discuss the exchange and how it is seeking to chart a new direction for the industry.

INTRODUCED BY

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

PANELISTS

Gordon Downes, CEO, New York Shipping Exchange

Mark Chadwick, Executive Sourcing Leader, Global Logistics, GE; President, Global Shippers Association

Thorsten Haeser, Chief Commercial Officer, Hapag-Lloyd

9:00-10:00 AM

CONCURRENT SESSION: THE EMERGING MEDITERRANEAN GATEWAY

Location: Saal 7 - 10

Seaports accessible from the Mediterranean are making inroads into containerised trade between European interior locations and markets in Asia and the Middle East. Shippers using ports such as Koper, La Spezia, Trieste and Genoa/Voltri are able to slash transit times, associated inventory carrying costs and product lead times. The Mediterranean gateways are relatively new options, with a limited number of shippers testing the waters. What's different now, though, is that once-limited options are multiplying. Rail connections are more frequent and reliable, and, given transit time savings of a week or more in some cases, shippers are eager to experiment, even if chronic challenges such as labour unrest remain a reality at certain gateways. This panel will analyse the rapidly changing nature of this growing route.

SESSION CHAIR & PRESENTER

Jolke Helbing, Director, Ocean Shipping Consultants

PANELISTS

Frederik Wexel, Director, MSC Austria, MSC Mediterranean Shipping Company

Marco Zollia, Sales and Marketing Manager, Trieste Marine Terminal SpA

10:00-11:00 AM

CASE STUDY: CUTTING THE FAT FROM THE BOOKING AND DOCUMENTATION PROCESS

Location: Saal 1 - 2

Shippers increasingly are attempting to cut costs by reducing the often-bloated time and expense associated with booking and documentation. When achieved, these become permanent savings, unlike freight rate reductions that can be wiped out if rates increase. One high-profile logistics startup focusing squarely on addressing this problem is Haven, based in Singapore and San Francisco. Haven says it can reduce the average time to process a bill of lading by 90 percent — which in one example meant 5 hours and 40 minutes — by eliminating emails and collapsing all tasks into a collaborative working environment around individual B/Ls. Under the Haven platform, as many as 300 emails around a single B/L can be slashed to zero. This Case Study will examine the time and costs beneficial cargo owners can save in this labor-intensive and painstaking administrative process.

INTRODUCED BY

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

PANELISTS

Matthew Tillman, Founder and CEO, Haven

Sean Ginnane, General Manager, Asia, Henry Bath Singapore PTE Ltd.

11:00-11:30 AM



NETWORKING COFFEE BREAK

Location: Saal 1 - 2 Foyer

11:30 AM-12:30 PM

CASE STUDY: BUILDING A GLOBAL OCEAN PROGRAM

Location: Saal 1 - 2

Chassis Brakes International, one of the world's largest manufacturers of automotive foundation brakes and foundation brake components, will describe its recently completed process of creating a global ocean program which has left it much better positioned to confront the 2017 reality of significantly constrained container space, unreliable transit times and higher pricing in trade lanes like Europe-Asia. The company completed its first global tender last fall, a process that involved fully understanding the company's global volumes and trade flows as well as the local needs and requirements of a diverse network

of manufacturing plants in Europe, Brazil, China and India which formerly procured ocean transport in individual silos. With the goals of reducing freight spend, inventory levels and transit times, improving visibility and avoiding disruption, the company consolidated all its global ocean procurement which put it in a much better position to navigate the current, space-constrained environment which was a complete change from last fall when it completed its first global tender. Despite this empowered global approach, transit times inconsistency and unreliability created – and still creates – major supply chain disruptions. In this presentation Wilfried Hermine, the global Supply Chain Director, and Pierre Liguori, Director of the supply chain consultancy chez Tokema Ltd, will describe the company’s reasons for creating a global program, what some of the issues that arose in the process, what the experience has been so far and where it will take the process in the future. This session shall be a perfect opportunity to confront industrial manufacturers lead times reliability challenges with ocean carriers major concerns on the ever-changing and uncertain shipping market.

INTRODUCED BY

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

PANELISTS

Wilfried Hermine, Global Supply Chain Director, Chassis Brakes International (CBI)

Pierre Liguori, Director, Tokema Ltd.

12:45-1:45 PM

SHIPPER DEBRIEF

Location: Saal 7 - 10

A special, off-the-record discussion and review of the issues dominating today’s European containerized ocean shipping industry.

By Reservation Only for Shippers.