

Sunday, March 4

PLEASE NOTE: The Port Tour has moved to Wednesday.

SUNDAY



8:30 AM

2018 TPM Golf Tournament

Location: Pelican Hill Golf Club

Sponsored By: C.H. Robinson, ContainerPort Group, Inc., Vanguard Logistics Services (USA), Inc, Wan Hai Lines (America) Ltd.

11:00 AM — 7:00 PM

Registration

Location: Hyatt Regency Long Beach, Lobby

Sponsored By: Port of Long Beach

MONDAY



9:30 — 4:30 PM

TPM Challenge Cup: Regatta and Yacht Race

Location: Rainbow Pier, Long Beach Downtown Marina

New for 2018, this event will consist of on-the-water team building, networking, and racing using Catalina 37 sailboats operated by experienced crews.

Sponsored By: Acuitive Solutions, BOC International, Inc., Gulf Winds International, MSC Mediterranean Shipping Company (USA) INC., Port of Los Angeles, The Port of Virginia, Transworld Shipping (USA) Inc., TraPac, LLC

TUESDAY

WEDNESDAY

3:00 — 4:00 PM

Orientation to TPM

Location: Hyatt Regency Long Beach, Beacon Ballroom

How can you get the most out of TPM 2018? In this brief introductory session, open to new and veteran TPM attendees, members of the JOC editorial and event operations teams will provide a roadmap of the four-day event, providing details about what topics will be covered, how to obtain information you may be looking for, networking events, and generally how to maximize your experience in Long Beach.

Session Chairs

Chris Brooks, Director, Programming, JOC Events, Maritime & Trade, IHS Markit

Jennifer Woods, Director, JOC Events, Maritime & Trade, IHS Markit

ANTITRUST COMPLIANCE STATEMENT

IHS Markit Ltd. has a policy of strict compliance with all applicable antitrust and competition laws. The antitrust laws prohibit competitors from engaging in actions that could result in an unreasonable restraint of trade. Consequently, IHS Markit directors, officers, and employees, as well as all participants at IHS Markit meetings or events, must avoid discussing certain topics when they are together — both at formal meetings and in informal contacts with other industry members: prices, fees, rates, profit margins, or other terms or conditions of sale (including allowances, credit terms, and warranties); allocation of markets or customers or division of territories; or refusals to deal with or boycotts of suppliers, customers or other third parties, or topics that may lead participants not to deal with a particular supplier, customer, or third party.

Violations of antitrust or competition laws can pose serious consequences for IHS Markit and its officers, directors, and employees, and those who use its services and solutions. Participants in IHS Markit meetings and events have an obligation to terminate any discussion, seek legal counsel's advice, or, if necessary, terminate any meeting if the discussion might be construed to raise antitrust or competition risks.

4:00 — 5:00 PM

Shipper Briefing

Location: Hyatt Regency Long Beach, Beacon Ballroom

A special, off-the-record discussion and review of the issues dominating today's containerized ocean shipping industry. **By Reservation Only for Shippers.**

5:00 — 7:00 PM

Hospitality Reception

Location: Hyatt Regency Long Beach, Pool Deck

Sponsored By: Canadian Pacific (CP)

Monday, March 5

7:00 AM — 6:00 PM

Registration

Location: Hyatt Regency Long Beach, Lobby

Sponsored By: Port of Long Beach

7:30 — 8:30 AM

Networking Breakfast

Location: 1st Floor

Sponsored By: INTRA

8:30 — 9:00 AM

Welcome Remarks

Location: Grand Ballroom, 2nd Floor

Stuart Strachan, Senior Vice President, Maritime & Trade, IHS Markit

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

Chris Brooks, Director, Programming, JOC Events, Maritime & Trade, IHS Markit

Lou Anne Bynum, President, Long Beach Board of Harbor Commissioners

9:00 — 9:45 AM

Keynote Address

Location: Grand Ballroom, 2nd Floor

Wasting no time after being appointed to chairman of board of management of Schenker AG in 2015, Jochen Thewes set three ambitious goals for the world's third-largest logistics provider. By 2020, the former Kuehne + Nagel executive wants the DB Schenker business unit to attain top positions in target markets, and become the industry's top employer and an "eco-pioneer." Aiming to fulfill the first of these goals, Thewes recently told the French business media outlet Les Echos that the company would invest \$240 million to become the top road and air

All sessions will take place at the Long Beach Convention Center unless otherwise indicated.

Program

logistics player in France, with the aim of toppling Paris-based Geodis. The aggressive approach comes as Thewes envisions a transformation of the ocean shipping market into something “completely different 18 months to two years from now,” following recent carrier consolidation. In his opening keynote speech at TPM 2018, Thewes, who has worked in Brazil, Vietnam, China, Hong Kong, New York, and Singapore among other locations, will discuss his perspective and vision regarding global ocean- and air-based supply chains.

Sponsored By: ContainerPort Group, Inc.

Introduced By

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

Keynote Speaker

Jochen Thewes, CEO and Chairman of the Board of Management, DB Schenker

9:45 — 10:15 AM

The Economic And Trade Outlook: A Presentation by IHS Markit Chief Economist Dr. Nariman Behravesh

Location: Grand Ballroom, 2nd Floor

In a welcome change from the past few years, global growth entering 2018 is strong, economic slack is diminishing, and there are early signs that inflation is beginning to rise, IHS Markit Chief Economist Nariman Behravesh said on Jan. 15. Over the past month, IHS Markit revised upwards its world economic growth forecast from 3.2 percent to 3.3 percent in 2018 and from 3.1 percent to 3.2 percent in 2019, reflecting improved outlooks for the United States, Canada, and China. With robust growth and (gradually) rising inflation, concerns about overheating are also increasing. This presents a new risk, he says. If central banks are seen to be “behind the curve,” and might have to tighten more and sooner than financial markets expect, then the damage to confidence and the expansion could be substantial. Given that inflation is still modest (albeit rising), such a scenario seems at least a year or two away. In the US it now appears that, after two quarters of 3 percent-plus growth, the US economy took a breather at the end of the year, with expected fourth-quarter GDP growth of around 2.5 percent. However, the forecast for 2018–2020 has been revised modestly upwards to reflect inclusion of the Tax Cuts and Jobs Act signed into law on Dec. 22, which among other things cuts personal taxes through 2025, allows expensing of equipment through 2026, and reduces the corporate tax rate permanently. In 2017, Behravesh was awarded the Lawrence R. Klein Blue Chip Forecasting Award, one of the oldest and most prestigious awards in economics, presented to the individual or team with the most accurate economic forecast among Blue Chip Economic Indicators’ survey participants. In this, his fourth appearance at TPM, Dr. Behravesh will offer his characteristically lucid and plainly spoken economic forecast that has proven very popular with TPM attendees.

Sponsored By: Laufer Group International, Ltd.

Session Introduction

Mark Laufer, CEO, Laufer Group International Ltd.

Introduced By

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

Featured Speaker

Dr. Nariman Behravesh, Chief Economist, IHS Markit

10:15 — 10:45 AM

Networking Break

Location: 1st Floor

Sponsored By: Jacksonville Port Authority (JAXPORT)

All sessions will take place at the Long Beach Convention Center unless otherwise indicated.

10:45 AM — 12:00 PM

Container Shipping Outlook: Will a Recovery Year For Carriers Carry Over Into 2018?

Location: Grand Ballroom, 2nd Floor

The first half of 2017 was positive for carriers that benefited from higher spot and contract rates driven by a growing global economy and tight capacity. It led Maersk Group CEO Soren Skou in August to proclaim, "What we see now is probably the strongest fundamentals for container shipping that we've had for quite a while and certainly since 2010." As Hapag-Lloyd CEO Rolf Habben Jansen told the JOC Europe Conference in Hamburg in September, "We think that capacity growth is pretty much coming to a halt, scrapping remains at a high level, and that means we're getting to an era that is likely going to be a little more stable than we have seen in a long, long time." The second half of 2017 has proved less fortuitous for the carriers as spot rates dropped 18 percent between mid-August and mid-September, according to Freightos, and driving spot rates below contract rates, alienating some shippers. The longer-term supply-demand outlook has grown murky with the resumption of mega-ship ordering by Mediterranean Shipping Co. and CMA CGM. As it stands early in the fourth quarter, the market overall continues to recover but not at the rate of early 2017. "Rates are expected to rise again next year, but not at anything like the same margin as this year," Drewry reported in mid-October. In this market outlook session, three speakers will present their perspective on supply, demand, and market fundamentals in the trans-Pacific and globally in 2018.

Sponsored By: CargoSphere

Session Introduction

Neil Barni, Managing Director, CargoSphere, Now a WiseTech Global Company

Session Chair

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

Panelists

Dr. Yin Ming, Deputy Secretary-General, Shanghai Maritime University

Peter Sand, Chief Shipping Analyst, BIMCO

Graham Slack, Chief Economist, Maersk Group

12:00 — 12:30 PM

TPM Accelerator: Containerized Trade and US Customs — Taking the Temperature

Location: Grand Ballroom, 2nd Floor

Moving containerized goods seamlessly into and out of the US requires a commitment from the US government to facilitate trade at ports and borders as an economic priority. Yet that's sadly not the current message coming from the US government. According to Pete Mento, vice president of global trade and managed services for Crane Worldwide Logistics, the trade community is profoundly disappointed. "Things are pretty tense these days between Customs and the trade," he wrote in September. "The environment has slid backward toward a lack of confidence in one another. On our end, we question if ACE — a billion dollars over budget, a decade behind schedule and entirely underwhelming — will ever deliver on any of its promises, or even just work consistently. (We challenge) anyone to tell us that C-TPAT works or to show any benefit to membership. The Centers for Excellence are understaffed and lack the budget to be effective. And possibly worst of all, we don't seem to be having meaningful conversations anymore. It's gone back to us being dictated to rather than seeking partnerships." And here's the bottom line, he said: "All of my conversations with CBP officials leave me with one simple impression: There will be a renewed enthusiasm for reviews, audits, and enforcement." In this solo "Accelerator" speech at TPM, Mento, an exuberant, and well-regarded speaker, will discuss his view of the Customs situation as it relates to containerized trade and where he sees it headed. Prior to joining Crane, he was practice leader and principal of Ryan Tax LLC's customs and

All sessions will take place at the Long Beach Convention Center unless otherwise indicated.

Program

global trade practice. While there, he managed the recovery and avoidance of global duties and VAT for importers worldwide. Mento, who previously led the global customs efforts for C.H. Robinson, is a customhouse broker, foreign relations expert, and trade academic. He is one of the world's leading experts on international trade policy and supply chain security, and an often-quoted source on the development of the US and global economy and the role trade policy has played.

Sponsored By: CenterPoint Properties

Introduction

Chris Brooks, Director, Programming, JOC Events, Maritime & Trade, IHS Markit

Featured Speaker

Pete Mento, Vice President, Global Trade and Managed Services, Crane Worldwide Logistics

12:30 — 2:00 PM

Lunch with Speaker: Creating Value for North American Intermodal Shippers

Location: Hyatt Regency Long Beach, Regency & Beacon Ballrooms

Whatever your opinion of Canadian Pacific Railway under the late E. Hunter Harrison, there's no doubt that he turned the once poorly performing railroad into one able to make dynamic intermodal moves under Keith Creel, who took over as CEO in January 2017. Creel is capitalizing on CP's firmer footing to transform the railroad into what modern intermodal customers need and demand: an enabler of supply chain value rather than just a line-haul operator. That's evident in CP's harnessing of automation at terminals for faster truck turns, speeding up cross-border shipments, and launching services that give US importers and exporters access to the Port of Vancouver, British Columbia. "It's the total service offering that you take to the marketplace that drives ... compelling value-creating conversations," Creel told investors in October. Realizing shipper demands and competition is only intensifying; Creel will explain how CP is collaborating and embrace technology to serve the modern containerized supply chain, while offering his view of the state of the North American intermodal market and his vision of the future.

Sponsored By: Kuehne + Nagel

Session Introduction

Marcus Reimann, Senior Vice President-Seafreight North America, Kuehne + Nagel

Introduction

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

Featured Speaker

Keith Creel, President and CEO, Canadian Pacific Railway

2:00 — 3:00 PM

View from the Top: A Roundtable Discussion with Industry Leaders

Location: Grand Ballroom, 2nd Floor

The industry is changing, but how fast, and what is hype and what really matters? The carriers may consolidate further — some believe more deals are coming — but the bulk of merger-and-acquisition activity is likely done for the moment, and now customers, carriers, and third-party logistics providers are adjusting. Carriers are thinking differently about offering guaranteed services, while 3PLs are trying to leverage technology to create differentiation. Customers have their own needs — reliability, visibility, and competitive costs among them — and those largely haven't changed. Neither has the likelihood of achieving them, however. With trans-Pacific rates toward the end of 2017 in free fall, with no evidence that consolidation is making any difference, where will carriers find the investment needed to improve service? Is anyone bringing a level of technology to the market or any other idea

All sessions will take place at the Long Beach Convention Center unless otherwise indicated.

SUNDAY

MONDAY

TUESDAY

WEDNESDAY

for that matter that can truly drive value? In this session with four industry leaders, Melinda Crane, chief diplomatic correspondent for the German media group DW, will lead an in-depth and highly focused discussion aimed at shedding light on the major issues confronting shippers in 2018 and in the years beyond that.

Sponsored By: PhilaPort

Session Introduction

Greg Iannarelli, Sr. Director, Business Development & Chief Counsel

Session Chair

Dr. Melinda Crane, Chief Correspondent, Deutsche Welle TV, USA and Germany

Panelists

Nicolas Sartini, CEO, APL

Tom Behrens-Sorensen, Chairman, CEO, Behrens-Sorensen Advisory P/S

Beth Whited, Executive Vice President and Chief Marketing Officer, Union Pacific Railroad

Ryan Petersen, CEO, Flexport

3:00 — 3:30 PM

Networking Break

Location: 1st Floor

CONCURRENT BREAKOUT SESSIONS

3:30 — 4:30 PM ■ General Session

Gridlock at the Gates: The Urgent Need for Extended Gates and Trucker Appointments at North American Ports

Location: Grand Ballroom, 2nd Floor

The import surges caused by mega-ship calls are forcing beneficial cargo owners to take a harder look at truck turns times, and what marine terminals are doing to keep them down and predictable. Terminal operators, truckers, BCOs, and technology providers understand the factors that contribute to gate congestion, and they are implementing measures to eradicate the problems when possible, or at least mitigate the bottlenecks. The Harbor Trucking Association of Southern California has detailed data going back five years that tracks increased truck turn times due to peak-season volume surges, changes in vessel deployments due to carrier alliances and labor disruptions. The HTA also tracks improvements in turn times resulting from slack season drops in container volume, implementation of trucker appointment systems, and formation of neutral chassis pools. Terminal operators are adjusting to the mega-ship cargo surges with process improvements such as container dray-offs and peel-offs, extended gate hours, and trucker appointment systems. Technology providers have developed a number of tools that give truck dispatchers real-time visibility to gate queues and congestion at specific locations within the marine terminals. BCOs have developed their own preparedness programs to guard against interruptions in cargo flow, and to recover from incidents when they occur. The industry has made significant strides in reducing marine terminal gate congestion, but more work remains. This session will analyze the state of gate efficiency at North American ports, and where it needs to go to increase fluidity.

Sponsored By: Maryland Port Administration - Port of Baltimore

Session Introduction

Dave Thomas, Deputy Executive Director, Maryland Port Administration

Session Chair

Hugh Morley, Senior Editor, JOC, Maritime & Trade, IHS Markit

All sessions will take place at the Long Beach Convention Center unless otherwise indicated.



Program

Panelists

Edward DeNike, President, SSA Containers

Weston LaBar, Founding Partner, PEAR Strategies, and CEO, Harbor Trucking Association

Allen Thomas, Chief Strategy Officer, Advent Intermodal Solutions

Wim Lagaay, Head of North America and Europe Portfolio, APM Terminals

Jeffrey Solomon, Director, Operations, SG Footwear

3:30 — 4:30 PM ■ Exports Session

Exports I: Back on a Growth Track — Analyzing the US Export Outlook

Location: 102, 1st Floor

After declining 3 percent from 2013 to 2016, US containerized exports were on track to grow in 2017. Although the growth has been slight, it's nonetheless benefited cotton, poultry, lumber, and other shippers as well as railroads, marine terminals, and container lines looking to handle anything other than empties on the US backhaul trade, despite low export rates. Through the first nine months of 2017, containerized exports stood at 9.3 million TEU, up 0.3 percent from the same period a year earlier, according to IHS Markit. That may appear to be scant progress, especially measured against the 5 percent increase US imports posted in the same period, but it reveals positive underlying dynamics. That's because waste paper exports, one of the highest volume commodities moving in the westbound trans-Pacific and accounting for more than 6 percent of all US containerized exports, plummeted 11.6 percent in the period, to 1.1 million TEU, after China — the largest destination for recyclables — in August began a major crackdown on the importation of scrap paper as part of a larger environmental initiative. Helping to offset that decline was strong overall growth in lumber products (up 22 percent to more than 530,000 TEU), cotton (up more than 30 percent to nearly 255,000 TEU) and paper/paperboard (up 8 percent to more than 437,000 TEU). Other favorable trends include signs of economic recovery in Brazil and the strengthening of the real, which helped push US export growth to the east coast of South America to 5 percent in the first nine months of 2017, and the emergence of Africa as a US export destination — the continent led all regions over the period with 6.3 percent growth, although on a small base of less than 200,000 TEU, according to IHS Markit data. This session will take a deep dive into the market forces driving growth in US containerized exports and the outlook for 2018 and beyond.

Session Chair

Edward Zaninelli President, Griffin Creek Consulting

Featured Speaker

Paul Bingham, Vice President, Economic Development Research Group

3:30 — 4:30 PM ■ Technology Session

Technology I: The Cyber Threat — Developing a Business Continuity Strategy

Location: 103, 1st Floor

On June 27, the shipping world received a rude shock of how vulnerable it is to weaknesses in cybersecurity when Maersk fell victim to the so-called NotPetra ransomware attack that crippled its network and took months and millions of dollars to recover from. The attack, of which Maersk was one of thousands of victims, caused the shutdown of several Maersk-owned marine terminals, booking functionality and back-end systems, and required the world's largest container carrier to temporarily revert to the days of manual operations. It possibly cost the carrier 400,000 TEU worth of business, according to analyst Lars Jensen and the cost to its bottom line, as the company revealed in November, was \$250 million to 300 million. The attack was mentioned 31 times in the company's third-quarter earnings call on Nov. 7. The attack brought to life the latest and possibly least predictable risk to container supply chains. A shipper can pull cargo from a financially weak carrier and avoid ports vulnerable to longshore labor action. But how can shippers protect their supply chains from the risk of cyberattack when

All sessions will take place at the Long Beach Convention Center unless otherwise indicated.

they're perpetrated by shadowy, possibly state-sponsored actors who evolve their methods faster than defenses can keep up with them? In this session, we'll take a close look at this question, bringing in cybersecurity experts to help us better understand the nature of the risk, the likelihood and severity of possible future attacks, and most importantly what shippers can do to mitigate the risk.

Sponsored By: Venable LLP

Session Introduction

Ashley Craig, Partner, Venable LLP

Session Chair

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

Panelists

Inna Kuznetsova, President and Chief Operating Officer, INTTRA

Jochen Gutschmidt, Head of Global Logistics Procurement, Nestrade SA

Christy Coffey, Executive Vice President, Operations, Maritime & Port Security Information Sharing and Analysis Organization

3:30 — 4:30 PM ■ Cool Cargoes Session

Cool Cargoes I: Where is the Global Reefer Market Headed?

Location: 104B, 1st Floor

The fundamental drivers in the global refrigerated shipping market remain strong and the future forecast is bullish. Seaborne refrigerated cargo carried by container ships and specialized reefer operators combined will exceed 134 million metric tons by 2021, according to Drewry. At the same time, container ships will continue to capture market share from specialized reefer operators, the consulting firm says, with container ships' control of reefer cargo growing to 85 percent of the global reefer market over this three-year period. Yet there are apparent wrinkles in the otherwise rosy outlook. A shortage of reefer containers is pushing rates higher and ratcheting up supply chain risk for perishable shippers whose products are extremely time- and temperature sensitive. Indeed, 2016 marked the first year that demand for reefer containers outpaced supply, Drewry noted, with little relief on the horizon. In this critical "State of the Reefer Industry" session, Thomas Eskesen, founder of Eskesen Advisory, will deliver a comprehensive analysis of the current market indicators and what they portend for perishable shippers, carriers, and the cold chain community at large. Joining Eskesen to round out the hour-long discussion will be stakeholders representing key areas of the global reefer market who will weigh in with their market perspectives.

Sponsored By: North Carolina State Ports Authority

Session Introduction

Hans Bean, VP Trade Development, North Carolina Ports

Session Chair & Presenter

Lara L. Sowinski, Editorial Director, Supply Chain Network, AC Business Media

Panelists

Thomas Eskesen, Founder, Eskesen Advisory

Anne-Sophie Zerlang Karlson, Global Head of Reefer Management, Maersk Line

Robert Sappio, CEO, SeaCube Containers

Diogo Lobo, CEO, NorthPoint Logistics

Leo A. Holt, President, Holt Logistics

All sessions will take place at the Long Beach Convention Center unless otherwise indicated.

CONCURRENT BREAKOUT SESSIONS

4:30 — 5:30 PM ■ General Session

Longshore Labor: A Sustainable Peace?

Location: Grand Ballroom, 2nd Floor

Now it's longshore unions competing for your cargo. US longshore labor unions want your cargo, and they're showing they're willing to compete for it. This is a change. In August, the International Longshore and Warehouse Union on the US West Coast voted overwhelmingly to extend its contract for five years, something it had never done before, in order to send a powerful message to beneficial cargo owners who have been shifting cargo to East and Gulf Coast ports. Worried that its sizable market share gains in recent years could be in jeopardy, the International Longshoremen's Association representing dockworkers on the East and Gulf coasts in December plans to begin discussing with employers the idea of extending its own contract for several years to deliver the same message: convincing BCOs that the East Coast also can guarantee labor peace. Although BCOs want the opportunity to plan their supply chains free from the fear of strikes, work slowdowns or employer lockouts, this year's moves were only first steps toward that goal. Even with the West Coast extension, there is still cause for concern. The ILWU is intensifying a drive to organize supervisors, after an initial win at the APL terminal at Los Angeles, which will affect terminals at Los Angeles-Long Beach and possibly up the coast. As the ships calling US ports get steadily larger, to what degree is longshore labor willing to be supportive? Specifically, what more are the unions willing to do to improve efficiency in the handling of cargo surges of 10,000 or more containers per vessel call? Are they prepared to consistently handle container exchanges of 24,000, as the ILWU did from a Maersk Line vessel call in Los Angeles last fall? This session will lead us through the current dynamics and look at what the future may bring in this critical scenario for US ocean supply chains.

Panelists

Bill Mongelluzzo, Senior Editor, JOC, Maritime & Trade, IHS Markit

Joseph Bonney, Senior Editor, JOC, Maritime & Trade, IHS Markit

4:30 — 5:30 PM ■ Exports Session

Exports II: Exploring Sector-Specific Challenges — Resins, Cotton, Soybeans and Recyclables

Location: 102, 1st Floor

The macroeconomic indicators may be pointing to an improving landscape for US exporters, but it's not all positive for some commodities. On the growth side, the big story in 2018 and beyond will be synthetic resins, as producers ramp up output at plants along the US Gulf, and resin-packaging facilities sprout up in the mid- and South Atlantic. Overall, US resin exports are expected to double, to 1 million TEU, over the next few years as producers take advantage of low-cost natural gas feedstocks. With Houston handling roughly 40 percent of all resins volume — and growing to an estimated 500,000 TEU by 2020 — the Gulf's largest container port faces questions about whether it has the capacity and equipment to handle the coming surge. That not only presents opportunities for other export gateways, but raises concerns for other lower-cost exports, such as cotton. With cotton exports approaching 300,000 TEU a year and growing — and much of that moving through the US Gulf — the big question is how the surge in resins will impact container and trucking availability, and transportation costs, for cotton exporters. In anticipation of the surge, cotton shippers and forwarders have begun lining up alternatives, including identifying sources of empty containers at secondary inland distribution hubs near cotton-growing regions. The story for two other primary export sectors — soybeans and wastepaper — centers around China, where environmental and other regulatory initiatives are prompting strategic rethinking. On the former, 2017 got off to a strong start as demand in

All sessions will take place at the Long Beach Convention Center unless otherwise indicated.

Program

China surged and political unrest derailed Brazilian shipments. The good news for US soybean exporters soured quickly, however, as China installed new quality rules that took effect on Jan. 1. The new initiative could require additional processing of US product at Chinese ports to remove impurities, raising costs and reducing sales to the world's largest soybean importer. Finally, wastepaper, the largest segment of US exports at more than 10 million TEU a year, is looking for new markets as new environmental regulations in China led to a nearly 12 percent plunge in outbound US shipments in the first three quarters of 2017. This session, part of a renewed export focus at TPM, will analyze the challenges these four critical US export segments face, and the strategies shippers are taking to address them.

Session Chair

Edward Zaninelli President, Griffin Creek Consulting

Panelists

Michael Symonanis, Director, North America Logistics, Louis Dreyfus

Mike Steenhoek, Executive Director, Soy Transportation Coalition

Frank A. Vingerhoets, President, Katoen Natie USA

Tony Chenh, Business Development Account Manager, West, MerQbiz

SUNDAY

MONDAY

4:30 — 5:30 PM ■ Technology Session

Technology II: Blockchain — An Example of How it Could Apply to Shipping

Location: 103, 1st Floor

As time progresses, blockchain becomes harder to ignore, even if it's still in its infancy as a technology and business enabler. The idea of a decentralized system of enshrining transactions with the force of legal contracts is so compelling that it's been described, perhaps overenthusiastically, as the most powerful development in technology since the birth of the internet. In transportation and logistics blockchain is much discussed but has yet to make itself felt in a meaningful way. But the knocking on the door is only getting louder. Maersk and IBM on Jan. 16 announced formation of a new company to commercialize blockchain technology in shipping; The Blockchain in Transport Alliance, or BiTA, was recently formed by technology and transportation executives to create a forum for development of blockchain standards and education for the freight industry. A startup called ShipChain recently raised \$30 million to build a blockchain-based logistics platform. And what was billed as the first pilot of paperless bills of lading based on blockchain technology was completed in November by Zim Integrated Shipping, Sparx Logistics, and Wave Ltd. It is the last of these that we will focus on in this TPM session, providing a concrete example of how blockchain has the potential to impact if not transform basic ocean container processes.

Sponsored By: Amber Road

Session Introduction

Corey Rhodes, Vice President, Sales, Amber Road

Session Chair

Daniel James, Product Director, Markit Commodity Tracker, IHS Markit

Panelists

George Goldman, President, Zim USA

Gadi Ruschin, CEO, Wave

Bjorn Vang Jensen, Vice President, Global Logistics, Electrolux

Jason Manganaro, Vice President, Sales (USA), Sparx Logistics

TUESDAY

WEDNESDAY

All sessions will take place at the Long Beach Convention Center unless otherwise indicated.

4:30 — 5:30 PM ■ Cool Cargoes Session

Cool Cargoes II: What Dry Shippers Can Learn from Reefer Shippers

Location: 104B, 1st Floor

The benefits of a cross-disciplinary approach to supply chain management will serve as the model for this informative panel comprised of reefer BCOs who will share candid insight and valuable best practices related to shipping time- and temperature-sensitive cargoes. Given the unique demands associated with the reefer sector — from real-time tracking and tracing and rigorous compliance standards, to maintaining cold chain integrity from origin to destination — BCOs in this segment are a rich source of practical tips and advice for peers who ship non-perishable goods, but are likewise looking for better supply chain optimization, improved collaboration, unbiased feedback on the latest software and technology tools, and more.

Sponsored By: East Coast Warehouse & Distribution

Session Introduction

Jamie Overley, CEO, East Coast Warehouse & Distribution Corp.

Session Chair

Thomas Eskesen, Founder, Eskesen Advisory

Panelists

Chris Swartz, Director, Global Transportation and Logistics Services, AJC International

Chayenne Wiskerke, CEO, Wiskerke Onions

Michael Dempsey, Vice President, Container and Port Solutions, ORBCOMM

Franck Kayser, Independent Consultant, and former Chief Operations Officer, CMA CGM

5:30 — 7:30 PM

Welcome Reception

Location: Hyatt Regency Long Beach, Beacon Ballroom

Sponsored By: Port of Los Angeles

Tuesday, March 6

7:00 AM — 6:00 PM

Registration

Location: Hyatt Regency Long Beach, Lobby

Sponsored By: Port of Long Beach

7:15 — 8:15 AM

Influential Women in Transportation

By Reservation Only

Location: Beacon Ballroom, Hyatt Regency Long Beach

Join us for this special TPM breakfast where executive women in US government will share their professional insights on emerging US policies, priorities and trends in transportation and trade, as well as their personal

All sessions will take place at the Long Beach Convention Center unless otherwise indicated.

Program

experiences working in transportation for the US government.

Sponsored By: Port of Long Beach

Breakfast Hosts

Michelle Livingstone, Vice President of Transportation, The Home Depot

Lisa A. Verdon, Former Senior Transportation Advisor, US Department of State, Iraq

Featured Speakers

Rebecca F. Dye, Commissioner, Federal Maritime Commission

Julie Abraham, Director, Office of International Transportation and Trade, US Department of Transportation

7:30 — 8:30 AM

Networking Breakfast

Location: 1st Floor

Sponsored By: The Northwest Seaport Alliance

8:30 — 8:45 AM

Welcoming Remarks and LOG-NET E-Commerce Excellence Award

Location: Grand Ballroom, 2nd Floor

Log-Net's Electronic Commerce Excellence award has consistently reinforced the partnership between carriers and their customers and the fundamental importance of data quality in that relationship. Digitalization has made data management and data quality foundational elements of successful global supply chains. Whether the data is coming from smartphones, web forms, Internet of Things devices or EDI, it needs to be complete, timely, and accurate. Data quality is critical, considering the consumers of this information now range from import and logistics specialist to business intelligence and machine learning platforms that demand ever more granular information. For the past 15 years, Log-Net CEO John Motley has presented the Log-Net E-Commerce Excellence award. The award recognizes the efforts of the international carrier community and its outstanding daily performance with Log-Net's trading partner and data quality teams.

Sponsored By: LOG-NET Inc.

Introduced By

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

Featured Speaker

John Motley, CEO, Log-Net

8:45 — 9:00 AM

JOC Lifetime Achievement Award: Honoring Voxx International's Pat Moffett

Location: Grand Ballroom, 2nd Floor

We are delighted to recognize Pat Moffett upon his retirement as vice president for international logistics and compliance at Voxx International Corp. Few shippers both have the confidence of their organizations to publicly share their knowledge and are consistently willing to do so; Pat Moffett has these qualities, and the industry has benefited greatly over the years as he has appeared on numerous JOC event panels and been quoted in many articles in the JOC and other industry media. The industry has further benefited from the Long Island Import-Export Association, of which he has served as founder and chairman since 1982. Upon his retirement from Voxx, Moffett is not slowing down. He is the executive producer of a feature-length film to be released this year based on his 2008 book, *Ice Cream in the Cupboard*, a memoir of his experiences caring for his wife Carmen, who contracted early

All sessions will take place at the Long Beach Convention Center unless otherwise indicated.

Program

onset Alzheimer's at the age of 53. Join us to give a sincere thank you to Pat Moffett for an extraordinary logistics industry career.

Award Presented By

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

Honoree

Pat Moffett, Vice President, International Logistics, VOXX International

9:00 — 9:45 AM

One-On-One: A Conversation with Ocean Network Express CEO Jeremy Nixon

Location: Grand Ballroom, 2nd Floor

In July, Jeremy Nixon became the CEO of One Network Express, or ONE, the new global carrier created from the merger of the liner businesses NYK Line, MOL, and "K" Line, which will begin operating as a unified business in April 2018. He previously served as CEO of NYK after a long, distinguished career in which he held other executive roles at NYK, Maersk Line, and P&O Nedlloyd. Pledging to provide "the world's highest level of service," ONE will operate approximately 240 vessels, including 31 ultra-large container ships of up to 20,000 TEU. At the TPM Asia Conference in October, Nixon described ONE as a company that will be "big enough to survive but still small enough to care. We want to be very customer-centric, with very close relationships with the customers, and with a clear value proposition." He added that in creating ONE out of the three legacy Japanese carriers, "What we wanted to do is start something completely new, have a clean piece of paper that said, "if you were starting up a new liner company today, fit for purpose for the 21st century, how would you set it up?" In this one-on-one conversation, Nixon will discuss his views of the market, how he sees it evolving, the role he envisions ONE will play, and how it will be differentiated in the newly consolidated industry.

Sponsored By: Halifax Port Authority

Session Introduction

Paul DuVoisin, Vice President, Commercial, Halifax Port Authority

Session Chair

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

Featured Speaker

Jeremy Nixon, CEO, Ocean Network Express

9:45 — 10:45 AM

Enforceable Contracts: Where the Industry Needs to Go

Location: Grand Ballroom, 2nd Floor

If the container shipping industry is to ever enter the modern age and begin creating value in the supply chain, it must get beyond the current lackadaisical attitude regarding enforceability of contracts. The point of a contract is that it's a signed, legally binding document that commits both sides to perform in accordance with the stated terms. When either side can walk away with impunity from the agreement, it undermines the integrity of the business and discourages investment and other business activity built upon the premise of a contract representing a bona-fide relationship. That explains container shipping today where shippers, carriers and NVOs all have been guilty of walking away from contracted commitments when market forces make that convenient. For an important industry that the world relies upon to facilitate global trade, this is an antiquated, even shameful way of conducting business. It won't change by carriers imposing no-show fees on customers, or carriers paying a penalty for failing to load cargo delivered to the pier. Rather, change must be cultural, encouraged by example and stressed by industry leaders as a necessary transition the industry must undergo. In this discussion led by Hapag-Lloyd CEO

All sessions will take place at the Long Beach Convention Center unless otherwise indicated.

Rolf Habben-Jansen, major industry participants will discuss why enforceable contracts are critical for the industry to adapt worldwide.

Sponsored By: De Well Group

Session Introduction

John Hextall, Chief Executive Officer, De-Well Group

Session Chair & Presenter

Rolf Habben Jansen, CEO, Hapag-Lloyd AG

Panelists

James Miller, Global Category Procurement Manager, Caterpillar

Michael Burns, Vice President, Global Transportation and Omnichannel Logistics, Big Lots Stores

Steen Christensen, President, US, Hellmann Worldwide Logistics

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

Michelle Livingstone, Vice President of Transportation, The Home Depot

10:45 — 11:15 AM

Networking Break

Location: 1st Floor

Sponsored By: Gulf Winds International

11:15 AM — 12:15 PM

Want Good Service? Spend Time with Your Carrier and Forwarder!

Location: Grand Ballroom, 2nd Floor

With the market volatile and price indices and online marketplaces proliferating, the industry is officially obsessed with freight rates. With ships and containers all the same except the color, it's a commoditized market where price is the only remaining differentiator, right? Wrong. Come on, people, what is most important to companies that rely on container shipping isn't price but rather goods actually getting delivered so they can be sold to whoever your customer may be. A low rate doesn't achieve that. What does achieve it, consistently, and reliably, is the carrier and forwarder being just as invested in your success as you are. An impersonal, hands-off and price-dominated relationship driven frequently by a procurement mindset will almost guarantee that such a commitment isn't there. That makes a mockery of your low rate when business opportunities get lost and the logistics team takes the blame. It may sound quaint, but success means people, trust, and a commitment to deliver on promises. It's not about the freight rate anymore. In fact, the business relationship will deliver your desired freight rate by ensuring you are kept competitive with the market. This is a relationships business, not a freight rate business. This panel will explore.

Sponsored By: AFMS Global Transportation Consultants

Session Introduction

Mike Erickson, President, AFMS

Session Chair & Presenter

Chas Deller, Consultant, Drewry Supply Chain Advisor

Panelists

Mette Karapetian, Vice President, Global Accounts-North America, Shipco Transport Inc.

David J. Arsenault, Chief Strategy Officer, Direct ChassisLink Inc.

Mathieu Friedberg, Senior Vice-President - Commercial & Agency Network, CMA CGM

Andrew Gillespie, Director, Global Logistics, Ansell

Arthur Bredehoft, Director, Key Account Sales, Safmarine

All sessions will take place at the Long Beach Convention Center unless otherwise indicated.

Program

12:15 — 12:45 PM

TPM Accelerator: The Future of Trucking and What it Means for Shippers

Location: Grand Ballroom, 2nd Floor

For a while, many freight transport startups were calling themselves (or were labeled by others) the “Uber for Freight.” Now Uber itself can claim to be the official “Uber for Freight.” The company that took ride hailing to the masses entered the US trucking market in 2017, connecting shippers to an untapped pool of largely small and independent fleets, offering shippers access to capacity that previously had been largely unreachable. This is especially timely in the tightest US trucking market in years. Shippers tapping Uber Freight are able to procure trucking through traditional TMS systems and other means. Uber Freight begins to resemble the ubiquitous ride-hailing app when in the hands of a driver, who can identify loads and get paid using a highly user-friendly tool. In this highly anticipated presentation, Lior Ron, the head of Uber Freight and co-founder of the self-driving truck company, Otto, which is now part of Uber Advanced Technologies Group, will discuss Uber Freight’s vision for the digital freight marketplace and why it’s important for shippers in today’s challenging trucking market.

Sponsored By: Performance Team

Session Introduction

Fred Gilbert, Vice President, Strategy & Marketing, Performance Team

Session Chair

William B. Cassidy, Senior Editor, Trucking and Domestic Transportation, JOC, Maritime & Trade, IHS Markit

Featured Speaker

Lior Ron, Senior Director, Uber Freight

12:45 — 2:00 PM

Networking Lunch

Location: Hyatt Regency Long Beach, Regency & Beacon Ballrooms

CONCURRENT BREAKOUT SESSIONS

2:00 — 3:00 PM ■ Exports Session

Innovation Jam: What Problems Can Technology Really Solve? First of a Two-Part Track

Location: Grand Ballroom, 2nd Floor

Technology is all well and good, but what problems can it actually solve? That remains the disconnect between the hype and the reality of the digital revolution as it relates to transportation and logistics. Despite hundreds of millions of dollars invested in startups — not to mention massive technology investments by legacy players — basic problems that shippers experience every day remain unsolved. The question, then, is whether technology can solve them. The JOC editorial team set out to answer that by reaching out to beneficial cargo owners about their most severe supply chain challenges, and inviting technology providers and others to propose how they would solve them. Nearly 20 companies responded with some 80 proposed solutions to 17 of the most severe BCO pain points, proposals that an ad hoc committee of BCOs then reviewed and ultimately decided which ideas it wanted to see presented at TPM. The result: Eight technology providers will present their proposed solutions to pain points that range from poor supply chain visibility, exception/contingency management, gate efficiency, rolling of cargo, and variability in ocean carrier schedules. Attendees will have the opportunity to vote on the solution that most convincingly addresses the pain point it addresses, with the winner announced at the end of the jam. Moderating the sessions will be Brian Laung Aoaeh, CFA, a partner at Particle Ventures, a New York-based seed-stage venture

All sessions will take place at the Long Beach Convention Center unless otherwise indicated.

SUNDAY

MONDAY

TUESDAY

WEDNESDAY

Program

fund that invests in technology startups with a focus on supply chain, and who founded the rapidly growing New York Supply Chain Meetup. Aoaeh and the team at Particle believe the greatest technological shift of our time is happening at the intersection of data and heavy industry, making him an ideal moderator of the TPM Innovation Jam.

Sponsored by: Lanetix

Session Chair

Brian Laung Aoaeh, CFA, Partner, Particle Ventures

Panelists

Adam Compain, CEO, ClearMetal

Zvi Schreiber, CEO, Freightos

John Motley, CEO, Log-Net

Robin Jaacks, Vice President, Sales Operations, Ocean Insights

2:00 — 3:00 PM ■ General Session

Communicating Internally: Best Practices in Messaging to the C-Level and to Internal Stakeholders

Location: 102, 1st Floor

When things go wrong in shipping, the logistics teams can find themselves in the crosshairs of internal colleagues and/or senior management looking for someone to blame. Unfortunately, heads can roll over factors that are difficult to anticipate and can't be prevented. When things go right, it's taken for granted. On the positive side, logistics teams can provide crucial support for company objectives such as speed to market, cost reduction and reducing work capital. Effective logistics teams can effectively and creatively support company objectives while mitigating the danger of unnecessarily taking the blame for disruption. Being proactive in communicating potential issues to internal colleagues and seeking opportunities to create credibility are ways that best-in-class logistics teams pursue these objectives. This session will discuss best practices in internal communication, relationship building and messaging.

Sponsored By: Infor

Session Introduction

Monica Truelsch, Director Product Management, Infor (US), Inc., GT Nexus Commerce Network

Session Chair

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

Panelists

William Schmitz, Director of Global Transportation, Stanley Black & Decker

David Torma, Vice President, Global Supply Chain and Logistics, Claire's Stores

Klaus Schnede, Manager, North American Marine Category, Eastman Chemical

Hans Elmegaard, Senior Vice President, Global Head of Supply Chain Solutions, Panalpina

2:00 — 3:00 PM ■ General Session

Air Cargo Market Outlook: For Shippers, the Squeeze is On

Location: 103, 1st Floor

Approximately 50 percent of global air freight volume is a result of emergency shipments that would have moved by ocean if all had gone well at the production line, the warehouse, or the retail store. But even as the air cargo industry enjoys growth in volume that it hasn't seen in years, significant challenges are developing on two fronts that threaten to upset shipper requirements. In an environment where demand is greater than supply, tight space constraints can make it difficult for shippers to secure capacity on short notice, especially during peak shipping

All sessions will take place at the Long Beach Convention Center unless otherwise indicated.

SUNDAY

MONDAY

TUESDAY

WEDNESDAY

periods. Compounding the situation are mounting slot restrictions at global hub airports that limit the movements of freighter aircraft and force them to smaller airports that may have less developed supply chain facilities and connections. As of the third quarter of 2017, these dynamics were playing out amid the strongest year for air cargo yields and volumes in years. Through the first nine months of the year, global air freight demand was up more than 10 percent, according to the International Air Transport Association, despite September's 9.2 percent increase being the slowest growth in five months. What impact will this have on shippers that need to shift cargo at short notice? Will it force shippers to reconfigure their supply chains to avoid peak periods, and will it make it more difficult for forwarders to secure enough block space on airlines for their customers? This session will analyze the near- and long-term outlook for air freight, and give shippers a broad view of the market and how it will impact their supply chain planning.

Sponsored By: Apex Logistics International, Inc

Session Introduction

Mike Piza, Sr VP, Partner, Apex Global Logistics

Session Chair

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

Panelists

Glyn Hughes, Global Head of Cargo, International Air Transport Association

Sanne Manders, Chief Operating Officer, Flexport

Claudia Andersen, Import/Export Manager, Enterprise Logistics, 1-800-Flowers.com

2:00 — 3:00 PM ■ Exports Session

Asia I: A Changing China and What it Means For Importers and Exporters

Location: 104B, 1st Floor

Despite the growing market share of China's manufacturing competitors as costs rise and China moves away from low-value, high-polluting production, China will remain the predominant source for most companies manufacturing their products in Asia. But a new set of challenges are emerging as the country tries to climb the value chain: Factories and suppliers that aren't compliant with strict environmental laws face closure — tens of thousands had been shut down as of the fall of 2017 — and manufacturers of foreign products increasingly are running afoul of constantly evolving regulations in Europe and the US. As much as 12 percent of US-bound Chinese products tested by quality-control and compliance service provider Asia Inspection in the third quarter of 2017 were found to contain excessive amounts of lead, cadmium, and other heavy metals, while 2 to 5 percent of products intended for the European Union contained lead that was above permissible levels. Are beneficial cargo owners rethinking their China sourcing strategies, and are there any better options available? Will compliance issues accelerate a move toward near-shoring? What does China's crackdown on environmentally sensitive products such as wastepaper and other scrap materials mean for US and other exporters? This session will dive into these critical and evolving international trade dynamics.

Session Chair

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

Panelist

Tom Behrens-Sorensen, Chairman, CEO, Behrens-Sorensen Advisory P/S

3:00 — 3:30 PM

Networking Break

Location: 1st Floor

Sponsored By: Montreal Port Authority

All sessions will take place at the Long Beach Convention Center unless otherwise indicated.

CONCURRENT BREAKOUT SESSIONS

3:30 — 4:30 PM ■ Technology Session

What Problems Can Technology Really Solve? Second of a Two-Part Track

Location: Grand Ballroom, 2nd Floor

Technology is all well and good, but what problems can it actually solve? That remains the disconnect between the hype and the reality of the technology revolution as it relates to transportation and logistics. Despite the hundreds of millions of dollars invested in startups, not to mention massive technology investments by legacy players, basic problems that shippers experience every day remain unsolved. The question, then, is whether technology solve them. The JOC team is in the process of collecting dozens of pain points from beneficial cargo owners and through surveys that will cull the list to roughly 10 of the most severe choke points experienced today. We'll then invite technology companies and other vendors to propose how they would solve those problems, before going back to BCOs, who would decide which ideas they want to see presented at TPM. We'll devote two technology innovation sessions on the program to hearing those presentations that BCOs have voted to hear, which as a group will reveal the degree to which technology is capable of solving today's most vexing problems.

Sponsored By: MatchBack Systems Inc.

Session Introduction

Todd Ericksrud, President and CEO, MatchBack Systems

Session Chair

Brian Laung Aoaeh, CFA, Partner, Particle Ventures

Panelists

Gordon Downes, CEO, New York Shipping Exchange

Karim Jumma, Interim Chief Product Officer, INTTRA

Sumitha Sampath, Vice President, Operations, XVELA

Vladimir Pshonyak, Founder and CEO, Pier Trucker

3:30 — 4:30 PM ■ General Session

Are We Really Still Talking About Chassis?

Location: 102, 1st Floor

Unfortunately, yes. The reason is that, although carriers have largely withdrawn from chassis ownership, they still indirectly provide them to many BCOs by subsidizing their use within service contracts. Whether carriers are to blame for giving in to BCOs' demands, or BCOs are to blame for demanding them, or this is just a reality of a highly competitive market, the result is what it is: The entire container supply chain suffers from inconsistent chassis availability, an aging fleet and increasing costs for chassis rentals—a full decade after carriers began withdrawing from providing chassis in the US. Something needs to change. Truckers, the most fragile segment of the supply chain, suffer the most as drivers continue to waste valuable pickup and drop-off time because of the lack of interoperable pools at locations such as New York-New Jersey, which still can't reach agreement with port stakeholders on establishing a gray chassis pool at the largest East Coast port. Pressure on truckers affects BCOs as much as it does carriers and NVOs. Truckers end up paying a 50 percent premium or more for chassis designated by the ocean carrier compared to what it costs for truckers to use their own chassis. Most industry sources agree that the fix should start with ocean carriers finally getting out of the chassis business, but will that happen? "The fact that the pool fell apart in New York and New Jersey is very unfortunate," James Newsome, president and CEO of the South Carolina Ports Authority, said at the JOC Container Trade Europe conference in Hamburg in September. "There is no other way to operate today without a working chassis pool. The ports that don't have a well-working chassis pool are going to struggle."

Session Chair

Bill Mongelluzzo, Senior Editor, JOC, Maritime & Trade, IHS Markit

All sessions will take place at the Long Beach Convention Center unless otherwise indicated.

SUNDAY

MONDAY

TUESDAY

WEDNESDAY

Panelists

Richard J. Craig, President and CEO, MOL (America) Inc.

Dave Manning, President, TCW Inc., and President and Chairman, North American Chassis Pool Cooperative

Greg Moore, Executive Vice President, FlexiVan

3:30 — 4:30 PM ■ Workshop Session

Workshop: The view of the container shipping market from the Shanghai International Shipping Institute

Location: 103, 1st Floor

Where is the container market headed in 2018 and beyond in the trans-Pacific and globally? Industry realities are much changed from just a few years ago. Over the past two years, seven east-west carriers exited the market through merger, acquisition, or bankruptcy, and the global economy is expanding in unison for the first time since the 2008-2009 financial crisis. That's led the idle fleet to shrink to practically nothing in early 2018, according to Alphaliner. What does this mean for supply and demand over the coming year? In this in-depth presentation, we will hear from Dr. Yin Ming, an articulate and accomplished maritime economist who serves as deputy secretary-general of the Shanghai International Shipping Institute and who is also a professor of Shanghai Maritime University, whose research covers the theory, policy, and business of international shipping, including the container sector.

Introduced By

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

Workshop Leader

Dr. Yin Ming, Deputy Secretary-General, Shanghai International Shipping Institute, Shanghai Maritime University

3:30 — 4:30 PM ■ Exports Session

Asia II: South Asia's Emerging Markets — Are They Ready For Prime Time?

Location: 104B, 1st Floor

South Asia is one of the most promising regions for economic growth in the world. The region's key markets are improving their capacity for export manufacturing, including investing in sorely needed upgrades to shipping and logistics infrastructure, in the hope of attracting more of the international supply chain operations of beneficial cargo owners. With its huge population and enormous scope for development, India is the source of much of South Asia's potential. IHS Markit expects India's GDP to grow at more than 7 percent per year over the coming half decade, much higher than expected for China, albeit from a much lower base. Many agree the day is approaching when the India Subcontinent dethrones China as the world's primary manufacturing hub. How soon this happens, and whether it happens at all, depends to a large degree on the success of the Indian government's efforts to transform the manufacturing and shipping and logistics sectors, spearheaded by its mammoth "Make in India" and "Sagarmala" initiatives. Other markets in the region, including Sri Lanka, Bangladesh, and Pakistan, also are undergoing major upgrades to their logistics infrastructure, supporting increased levels of international sourcing and — in the case of Sri Lanka — a major boost in container shipping business. This one-on-one discussion with Dr. Parakrama Dissanayake, chairman of the Sri Lanka Ports Authority and one of South Asia's pre-eminent shipping professionals, will examine the region's potential as an international manufacturing center, as well as the challenges BCOs that want to increase investment in the region face, with a specific focus on logistics and shipping infrastructure and services in its key markets.

Session Chair

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

Featured Speaker

Dr. Parakrama Dissanayake, Chairman, Sri Lanka Ports Authority

All sessions will take place at the Long Beach Convention Center unless otherwise indicated.

CONCURRENT BREAKOUT SESSIONS

4:30 — 5:30 PM ■ General Session

Industrial Real Estate: Will Supply Keep Pace with Surging Demand?

Location: Grand Ballroom, 2nd Floor

Customer activity in the third quarter of 2017 was at the highest level since 2014, vacancy rates were 4.6 percent — the lowest that industrial real estate firm CBRE has seen in the decades it's tracked these rates — and rental prices increased 6.6 percent nationwide. Demand for distribution space was broad-based, with the e-commerce fulfillment, retail, transportation, and wholesale sectors all performing well. Although industrial developers generally expect 2018 to be a repeat of 2017, they note that total absorption lagged new deliveries for the first time in seven years during the second quarter of 2017, indicating the post-recession market may be starting to mature. Still, demand for industrial space in seaport-dependent coastal markets and major inland distribution hubs remains strong. Consumers' shift to e-commerce is fueling particularly strong demand for distribution centers located near end-users. CBRE estimates that each \$1 billion in additional e-commerce sales equates to at least 1.25 million square feet of distribution space, "and we think that's a conservative number," David Egan, head of CBRE's industrial research in the Americas, said at the JOC Inland Distribution Conference in November. Where are retailers and other large beneficial cargo owners looking to build new distribution facilities, and what types of structures are they building? Is the groundbreaking for the first multi-story distribution facility in the US near the Port of Seattle a harbinger for other locations? How does e-commerce fulfillment fit into the picture, where are last-mile facilities being built, and how does e-commerce feed off of containerized imports from Asia? What impact is the Panama Canal expansion and resins boom in the Gulf having on industrial property? A panel of industrial real estate experts will tell us where the smart money is going in the coming year.

Session Chair

Bill Mongelluzzo, Senior Editor, JOC, Maritime & Trade, IHS Markit

Panelists

Adam Mullen, Senior Managing Director, Americas Leader, CBRE

Michael P. Murphy, Chief Development Officer, CenterPoint Properties

Chris Caton, Senior Vice President, Research, Prologis

4:30 — 5:30 PM ■ Intermodal Session

Trucking Outlook: What Does Much Tighter Capacity Mean For Shippers?

Location: 102, First Floor

Beginning in mid-2017, the US trucking market took a dramatic turn toward tightness of capacity and higher pricing, as the steady economic expansion picked up steam, three major hurricanes drove up demand, and the industry continued to struggle to find and retain drivers. All this occurred before the mandate requiring electronic logging devices in all commercial trucks arrived in December, further stressing capacity. In 2004, the implementation of new federal hours-of-service rules for truckers drained 3 to 4 percent of national capacity, and the ELD mandate is expected to have a similar — or even more severe — effect, exacerbating what had emerged by November as the tightest US domestic market in years. Truckers are preparing shippers for double-digit price increases in 2018, and even intermodal rates experienced a turnaround and were higher in the third quarter. Consulting firm FTR Associates recently estimated that US trucking is operating at an extremely tight 95 percent of capacity. And Jeff Tucker, president and CEO of freight broker Tucker Company Worldwide in the fall said that "trucks are harder to find and more expensive than ever." This session will assess the market outlook for trucking, including drayage, into 2018 and 2019, and how shippers should plan to adjust.

Sponsored By: Drayage.com

All sessions will take place at the Long Beach Convention Center unless otherwise indicated.

Program

Session Introduction

Jason Hilsenbeck, President, Drayage.com

Session Chair

William B. Cassidy, Senior Editor, Trucking and Domestic Transportation, JOC, Maritime & Trade, IHS Markit

Panelists

Lee Klaskow, Senior Analyst, Transportation and Logistics, Bloomberg Intelligence

Jeff Tucker, CEO, Tucker Company Worldwide

John Janson, Director, Global Logistics, SanMar

Geoffrey Muessig, Executive Vice President and Chief Marketing Officer, Pitt Ohio

4:30 — 5:30 PM ■ General Session

The Automotive Supply Chain: Gearing for Major Change

Location: 103, First Floor

Ocean transit reliability deterioration, port congestion, and a lack of shipment visibility affects all types of beneficial cargo owners, but the forces are particularly dangerous to time-sensitive auto parts shippers. At nearly 1 million TEU a year, auto parts imports are a critical commodity for ocean carriers, freight forwarders, and US ports including Los Angeles, Long Beach, Charleston, Savannah, and New York-New Jersey. But immense challenges — and potentially disruptive ones — loom, including the impact of electric and autonomous vehicles, China's environmentally driven factory shutdowns, and regulatory initiatives in the US and abroad. In this special forum, auto parts shippers, transportation providers, and consultants will discuss how importers can mitigate these disruptive pressures. Auto parts shippers will learn how to better prepare for the peak season and Chinese New Year so their cargo doesn't miss a sailing. Discussion also will include strategic planning to ensure parts providers' products are coded properly for the Harmonized Tariff Schedule, and how to ensure that their logistics departments provide parts when they're needed while keeping inventories low without risking stockouts.

Session Chair

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

Panelists

Steven Hughes, President and CEO, HCS International

Thomas K. Beer, CEO, SSF Imported Auto Parts

Lawrence Burns, Senior Vice President, Trade and Sales, Hyundai Merchant Marine

4:30 — 5:30 PM ■ General Session

The Day of Reckoning Approaches: Environmental Mandates on Shipping

Location: 104B, First Floor

The day is fast approaching when global environmental mandates will meaningfully affect containerized supply chains. The first will hit on Jan. 1, 2020, when container ships and other deep-sea vessels will be subject to 0.5 percent cap on the sulfur content of marine fuel. To comply, ships will need to burn low-sulfur fuel at a potentially significantly higher cost — in mid-2017, compliant low-sulfur fuel was 50 percent more expensive than residual bunkers currently in use, and as demand for low-sulfur fuel grows after 2020, the differential could widen. As an alternative, ship-owners could install so-called scrubbers to remove sulfur from residual fuels, at a cost of approximately \$5 million to \$15 million per ship. Either way, the mandate likely will add significant new costs to ship-owners, which will pass them along to customers or possibly force weaker players out of business. The larger issue whose impact is still undetermined is carbon dioxide emissions. Shipping wasn't included in the landmark 2016 Paris climate agreement, with the International Maritime Organization tasked with determining how shipping globally will reduce CO2 emissions. The industry believes the IMO is the only body capable of implementing a global mandate versus the nightmare scenario of a patchwork of regional or national rules that could cripple global

All sessions will take place at the Long Beach Convention Center unless otherwise indicated.

SUNDAY

MONDAY

TUESDAY

WEDNESDAY

Program

trade. Pressure is growing on shipping to contribute to the global ambition of the below-2-Celsius future as agreed to in the Paris accord. The IMO has committed to getting a strategy in place beginning in 2023 to reduce greenhouse gas emissions for the industry. 2018 could see big decisions on how the IMO will achieve this goal.

Session Chair

John Gallagher, Senior Editor, Safety & Regulation, Maritime and Trade, IHS Fairplay

Panelists

Bryan Wood-Thomas, Vice President, World Shipping Council
Franck Kayser, Independent Consultant, and former Chief Operations Officer, CMA CGM

5:30 — 7:30 PM

Networking Reception

Location: Hyatt Regency Long Beach, Pool Deck
Sponsored By: Georgia Ports Authority

SUNDAY

MONDAY

Wednesday, March 7

8:00 — 11:00 AM

Registration

Location: Hyatt Regency Long Beach, Lobby
Sponsored By: Port of Long Beach

TUESDAY

8:30 — 9:00 AM

Networking Breakfast

Location: 104 Foyer

WEDNESDAY

SHIPPER CASE STUDIES

9:00 — 10:00 AM

Case Study: How Coordination by Ports Can Benefit BCO Supply Chains

Location: 104B

It was BCO supply chains that were the focus when the Georgia Ports Authority and the Port of Virginia in February 2017 filed their East Coast Gateway Terminal Agreement with the FMC. By sharing best practices and coordinating on vessel berthing windows, the two ports aimed to further enhance the value for BCOs and forwarders in using the two mid- and south Atlantic gateways. In this TPM case study, the executive directors of the two ports, along with beneficial cargo owners and other stakeholders, will discuss this unique port partnership and highlight the potential supply chain advantages the arrangement will offer for BCOs using both ports in the coming years. Inter-port discussions have included best practices, rail expansion, equipment purchases, safety, and training. The aim of the agreement is to provide superior logistics for BCOs supplying major population centers through US East Coast ports.

All sessions will take place at the Long Beach Convention Center unless otherwise indicated.

Program

Session Chair

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

Panelists

Griffith V. Lynch, Executive Director, Georgia Ports Authority

John F. Reinhart, CEO and Executive Director, The Port of Virginia

Marlon Jones, Manager, International Transportation, International Paper

William F. Rooney, Vice President, Strategic Development, Kuehne + Nagel

9:00 — 10:00 AM

Case Study: Bringing Stability to an Unstable and Unreliable Chassis Market

Location: 104C

In an operating environment that increasingly seeks improved visibility and relies more on data to better manage cargo flows, American Intermodal Management, led by former APL CEO Ron Widdows, has created a new model in the chassis space. AIM is an asset-owning and -leasing business that integrates technology and an array of sensors to provide real-time visibility into chassis movement and the data and analytics that result from it. The approach — a combination of improved visibility and insights that come from the data, as well as the ability to link container and chassis, and other data elements seamlessly — offers beneficial cargo owners, non-vessel-operating common carriers, third-party logistics providers, motor carriers, and other chassis users increasing stability in an otherwise information-starved and unreliable chassis space. In this case study, Widdows and AIM co-founder (and former APL operations chief) Nathaniel Seeds, together with users of the service will provide a review of the company's capabilities, how the integration of technology is being used to bring asset management and reliability to a higher level, and how their customers are leveraging data, and employing AIM's capabilities to augment the management of their supply chain/last mile. Joining Widdows and Seeds in providing perspective will be representatives from a cross-section of AIM customers, including BCOs, NVOs, 3PLs, and motor carriers.

Session Chairs

Ronald D. Widdows, Executive Chairman, American Intermodal Management, LLC, & Chairman, World Shipping Council

Nathaniel Seeds, CEO, American Intermodal Management

Panelists

Richard J. Craig, President and CEO, MOL (America) Inc.

Cliff Katab, President, Performance Team

10:00 — 10:30 AM

Networking Coffee Break

Location: 104 Foyer

10:00 AM — 12:30 PM

Technology Forum: Preparing The Port of Los Angeles-GE Transportation Information Portal for Prime Time

Location: Hyatt Regency Long Beach, Beacon Ballroom

Technology providers offer dozens of products to digitize supply chain functions, potentially relieving BCOs, carriers and freight intermediaries from the burden of transmitting multiple copies of paper documents. The digital products provide cargo booking and visibility, transportation management solutions, processing of Customs documentation, inventory management, shipment arrival forecasting, and enhanced asset utilization. The shipment information needed to make these decisions is available two to three weeks before the vessel reaches

All sessions will take place at the Long Beach Convention Center unless otherwise indicated.

Program

a US port, but because so many international relationships are siloed, much of the data isn't shared among supply chain partners until the cargo is discharged from the vessel at a US port. The Port of Los Angeles and GE Transportation have developed an information portal that they tested in 2017 at a marine terminal, with noticeable success, and the portal will expand portwide this year. Could this be the single, secure port information portal the industry is looking for to shorten the international supply chain and slash logistics costs? How will dozens of existing technology products plug into this so-called system of systems? In a series of structured discussions focusing on cargo visibility, electronic communication, forecasting, and inventory management, representatives of the port, GE Transportation and technology companies will update beneficial cargo owners on what to expect as the port information portal is prepared for prime time.

Session Chair

Bill Mongelluzzo, Senior Editor, JOC, Maritime & Trade, IHS Markit

Panelists

Gene Seroka, Executive Director, Port of Los Angeles

Jennifer Schopfer, Vice President, Transport Logistics, GE Transportation Digital Solutions

Deborah Ryan, Vice President, Global Transportation and Logistics, Ascena Retail Group

Weston LaBar, Founding Partner, PEAR Strategies, and Executive Director, Harbor Trucking Association

Tommy Barnes, President, Project44

Dr. Noel Hacegaba, Managing Director, Commercial Operations, and Chief Commercial Officer, Port of Long Beach

James Swanston, Founder and CEO, Voyage Control

Shankar Sengupta, Vice President, Engineering and Transport Logistics, GE Transportation

10:30 — 11:30 AM

Case Study: Omni-Channel & The Logistics-Centric Value Proposition

Location: 104B

Lakeshore Learning Materials, a Southern California-based maker of educational materials that imports 2,200 FEU from Asia annually supplemented by airfreight, combines its own assets with the capabilities of the global logistics community into a logistics value proposition that it feels is right for its business. The company works with nearly 30 logistics-related companies — including shipping lines, freight forwarders, truckers, brokers, and white-glove specialists — on purchase order management, buyer's consolidation, transloading, domestic intermodal, and other services. Lakeshore is an omnichannel organization with 60 retail stores, online sales, catalog sales, direct sales (to school districts), and even exports. In 2016, it decided to complement its existing 1 million square feet of company-owned warehouses in Carson, California, with a new, 100 percent company-owned distribution center facility in Midway, Kentucky. The decision to invest in and operate the facility itself bucks conventional thinking and the long-term trend toward the outsourcing of logistics services. In what will be a thought-provoking case study, Dan L. Gardner, Lakeshore's vice president of supply chain, will discuss the company's strategy.

Introduced By

Chris Brooks, Director, Programming, JOC Events, Maritime & Trade, IHS Markit

Panelist

Dan L. Gardner, Vice President, Supply Chain, Lakeshore Learning Materials

10:30 — 11:30 AM

Case Study: Cutting Off the Flow of Counterfeit Goods

Location: 104C

Walk the streets of any big city, and you see them: fake Gucci handbags and Rolex watches. But counterfeits aren't just about handbags and watches. There are fake medicines, fake shampoos and deodorants, razor blades and detergents. What else have you consumed that you thought was real but was actually made by criminals without

All sessions will take place at the Long Beach Convention Center unless otherwise indicated.

Program

any quality control? Even your ships might contain fake ball bearings. How do you make sure your own supply chain isn't full of fakes? According to a 2016 report by the European Union Intellectual Property Office and the Organization of Economic Cooperation, \$461 billion in counterfeit goods moved through international trade in 2013. In a summer 2017 follow-up, the two organizations found that smugglers of counterfeit goods are using Hong Kong, the United Arab Emirates, and Singapore as their main global trading hubs. Four transit points — Albania, Egypt, Morocco, and Ukraine — are key to introducing fake goods into Europe, and Panama is an important transit point for US-bound counterfeit goods, according to the new report. Further, some 75 percent of those goods move by ocean container, the OECD and EUIPO found. In short, criminal networks have enormous opportunities to abuse this critical supply chain channel to transport huge volumes of counterfeit products affecting virtually every product sector. But companies that transport these goods are key intermediaries in stopping this flow of counterfeits, and brand owners and shipping industry interests have signed a declaration of intent aimed at preventing the maritime transport of counterfeit goods. This case study will bring together some of these companies to discuss how they are working together to stop the transport of counterfeit goods on container ships, the challenges they face, the steps they are taking to stop the criminal infiltration of the supply chain, and what more can be done collaboratively to stop the shipment of fake goods.

Session Chair

Sophie Peresson, Programme Director, Business Action to Stop, Counterfeiting and Piracy

Panelists

Steven McLoughlin, Manager, Logistics, Philip Morris International

Marcela Chacón, Director, Public and Government Affairs for, Central America & the Caribbean, Bayer

Neil Barber, Vice President, Seafreight, Kuehne + Nagel AG

11:30 AM — 12:30 PM

Case Study: The Value to BCOs From Real-Time Ocean ETA

Location: 104B

As the price of sensors drops steadily, a new world of cargo visibility is gradually opening up. Long beholden to error-prone carrier EDI feeds, shippers continue to cite poor cargo visibility as a significant pain point as well as an opportunity to make fundamental supply chain improvement. For example, what would a precise and timely Ocean ETA do for a BCO's business? In recent cases, Savi and Panalpina partnered to deliver moment-to-moment visibility on non-reefer ocean shipments for leading shippers in the automotive, manufacturing, pharmaceutical and consumer sectors. With historical and real-time data on key lanes, BCOs learned new information on their supply chains, while Panalpina was able to support reduced transportation costs and improved customer satisfaction. Chuck McDaniel, an independent consultant who recently retired as global logistics manager for Procter & Gamble; Zac Yoffe, senior manager of product and supply chain security at Biogen; Nanette Efird, vice president of product for Savi; and Keith Hitchcock, vice president of consumer, retail and fashion for Panalpina, will discuss the journey to help BCOs improve competitiveness while deepening and improving relationships with important clients in some of the first uses of the power of IoT devices.

Introduced By

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

Panelists

Nanette Efird, Vice President, Product, Savi Technologies

Chuck McDaniel, Independent Consultant and Former Manager, Global Logistics, Procter & Gamble

Zachary Yoffe, Senior Manager, Product and Supply Chain Security, Biogen

Keith Hitchcock, Vice President, Consumer, Retail and Fashion, Panalpina

All sessions will take place at the Long Beach Convention Center unless otherwise indicated.

Program

12:30 — 2:00 PM

Lunch with Speaker “Bold and Clear Predictions”

Location: 104C

Author, consultant and former carrier executive Lars Jensen is one of the few individuals in the industry who consistently makes bold predictions for the future and more often than not is accurate. For example, at the 2014 TPM, he predicted that carriers would increasingly favor cost control over schedule reliability, which is what happened. (In full year 2013, data known at the time of the prediction, Asia-US West Coast reliability was 84 percent. We are now at 69 percent). At the 2012 TPM, he predicted the consolidation of the major carriers and at the 2013 TPM he predicted the over-ordering of mega-vessels. At the 2015 TPM, he predicted the scenario of a carrier brought to a halt by losing all IT systems in a cyberattack. In this luncheon presentation following the Wednesday morning program, Jensen, most recently the author of the book “Liner Shipping 2025,” will offer several new predictions, including: Out of the 100 largest container lines, how many will be left in 2020? And in 2025? And who will be the most likely survivors? How will Cosco become the world’s largest carrier, and what will the impact of this be on carriers, shippers and ports? The existing alliances will ultimately fail and be reshuffled. Why and what will the consequences be? Within 94 companies listed on the JOC’s Container Shipping Technology Matrix, which three will truly be catalysts for major change in the industry, why and how? What are the three most underappreciated (or ignored) growth drivers in the coming three years? What are the top three events in the next 24 months that will disrupt shippers’ supply chains? Join Lars for what will surely be a thought-provoking and controversial presentation.

Introduced By

Bill Mongelluzzo, Senior Editor, JOC, Maritime & Trade, IHS Markit

Featured Speaker

Lars Jensen, CEO and Partner, SeaIntelligence Consulting

2:30 — 4:00 PM

Long Beach Port Tour

Location: Dock #9, outside Parker’s Lighthouse, Shoreline Village

The Port of Long Beach cordially invites TPM attendees to join a 90-minute harbor cruise that will tour many of the port facilities. The cruise will depart from Dock #9, just outside of Parker’s Lighthouse in Shoreline Village in downtown Long Beach and will last approximately 90 minutes. The tour will offer a close-up look at the many container terminals, on-dock rail yards, and diverse mix of cargo that makes the Port of Long Beach a world leader in goods movement. TPM attendees may use this opportunity to discuss with port representatives how the current and future challenges of trade growth are being handled at the Port of Long Beach.

19TH
TPM
ANNUAL CONFERENCE

March 03 - 06 2019
Long Beach, California

All sessions will take place at the Long Beach Convention Center unless otherwise indicated.