



## TOC Container Supply Chain | Conference Programme

### *The global event for people who own, move and handle containerised cargo*

*"It was a pleasure to be part of my first TOC and I will for sure continue as a delegate next year. It was a very valuable conference for shippers and carriers and I made some interesting new contacts. The combination of conference and exhibition puts this event into the 'must-visits' in my calendar."*

- Helge Neumann-Lezius, Trade Manager Intra-Europe, **Kuehne + Nagel**

**TOC Container Supply Chain: Europe** is your opportunity to learn, debate and network with 100s of international port, shipping and logistics executives.

The conference attracts over **300 industry professionals** from more than 30 countries, including senior executives from throughout the container supply chain: shippers, freight forwarders, shipping lines, port authorities and terminal operators.



This leading container transport and trade forum provides **shippers and their logistics partners** with exclusive access to the insight and analysis that drives international trade, transportation and logistics.

The themes, topics and discussions are designed to provide a **comprehensive understanding** of the container transport issues that affect shippers' logistics operations.

Don't miss your opportunity to **gain practical solutions** to your current industry challenges and stay up-to-date with the latest developments affecting your container shipping, port or logistics business.

#### Why attend?

- **Connect** with the whole container supply chain: ports, terminals, shipping lines, 3PLs, shippers
- **Hear** leading industry analysts and understand the key container shipping mega-trends and market forecasts affecting your business
- **Join** in the hot topic roundtable discussions: no speeches, no power points; just peer-to-peer dialogue and relationship building
- **Hear** expert analysis on the impact of the P3 network
- **Learn** how to easily analyse shipping scenarios for your customers
- **Discover** how terminal productivity in Europe compares with the rest of the world
- **Understand** your customers' critical needs and position your strategy around what shippers really want
- **What do shippers want?** Find out their short, mid and long term service requirements and get ahead of your competitors
- **Evaluate** the potential consequences of further carrier consolidation
- **Explore** new opportunities in Russian ports, shipping and logistics



## Speakers & Moderators

The speaker list and agenda are in progress and will be continually updated | Last update 28 May 2014

Alan Williams, Director, Europe Strategy, **UPS (Keynote Speaker)**

Neville Scowen, Overseas Transport Manager, **International Paper (Keynote Speaker)**

Gary Hodgson, Chief Operating Officer, **Peel Ports Group**

Carlos Vazquez, Global Category Manager, Ocean Freight Purchasing Organization, **Michelin**

Josselin Basile, Logistics Manager, **America Chung Nam**

Paul Miller, Director Inbound Logistics, **Shop Direct**

Chantal Van de Velde, Customer Service - Transport Procurement, **Puratos**

Ruslan Alikhanov, President and CEO, **FESCO Transportation Group**

Joyce Blik, Director Containers & Breakbulk, **Port of Rotterdam Authority**

David Huck, Port Director, **Peel Ports Group**

Stephen Carr, Head of Commercial Strategy, **Peel Ports**

Koert Luitwieler, Shipping Director, **BG Freight Line**

Andrey Naraevskiy, Director Liner and Business Development, **Global Container Service**

Anthony Woolich, Partner, **Holman Fenwick Willan**

Chris Welsh, Secretary-General, **Global Shippers' Forum**

Cas Pouderoyen, SVP Global Ocean Freight, **Agility**

Helge Neumann-Lezius, Trade Manager Intra-Europe, **Kuehne + Nagel**

Simon Sundboell, Group Commercial Manager, **Gulftainer**

Peter Ward, Cargo Supply Chain Commercial Manager, **DP World London Gateway**

Gagan Seksaria, CFO & Head – Investments, **ICTSI Africa Region**

Alexandre Gallo, General Manager, **Novatrans**

Paul Jacob Bins, Managing Director - Benelux & France, **Euroports**

John Fossey, Maritime Transport Consultant, **Moffatt & Nichol**

Martin Dixon, Director - Head of Research Products, **Drewry**

Jolke Helbing, Associate Consulting Director, **ICF GHK**

Ben Hackett, President, **Hackett Associates**

Dirk Visser, Senior Shipping Consultant, **Dynamar B.V.**

Andrew Penfold, Project Director, **Ocean Shipping Consultants**

Berend R. Paasman, SVP Shipping, Offshore and Logistics, **DNB Bank ASA**

Bill Karakostas, **iCargo**

Olga Fialkina, Director General, **SeaNews**

Paula Hamilton, Assistant Secretary, Dockers' Section, **International Transport Workers' Federation**

Richard Clarke, Director, **Richard Clarke Marine**

Christian Blauert, Managing Director, **HPMport Project & Management Consultants**



## Port Tour | Monday 23 June

### EXCLUSIVE PORT TOUR OF DP WORLD LONDON GATEWAY



**DP WORLD**  
London Gateway



Your delegate pass includes the opportunity to join an exclusive port tour of DP World London Gateway, the UK's first new port for 20 years.

On the doorstep of London, with unrivalled deep-water access, road and rail links to the whole of the UK, London Gateway is a newly built, state-of-the-art, highly automated deep-sea container port.

*A detailed itinerary of the tour will be announced shortly.*

Please note that tours of London Gateway are unfortunately subject to competitor exclusions and therefore the delegate list for this event will need to be vetted.

## Conference Day 1 | Tuesday 24 June

**08:00** Conference registration desk opens

**09:00-10:00** **CONFERENCE OPENING, WELCOME ADDRESS & KEYNOTE PANEL**  
**– MAKING SENSE OF SCALE**

**The progressive scale in container shipping is clear to see** – carrier alliances are becoming more widespread, ports need bigger and more sophisticated equipment, and the first ever 19,000 teu mega vessel is due to be delivered this November. This comes just months after the maiden voyage of the Maersk Mc-Kinney Møller, itself a massive 18,000 teu and currently the world's biggest ship.

Alliances and new service networks mean shippers and their logistics partners have to constantly analyse new shipping scenarios. Meanwhile, ports are in a race to upgrade their infrastructure to handle bigger and bigger ships.

**So how do you make sense of the scale in container shipping?** In this opening conference session, keynote speakers will set the scene for the 3-days ahead with a wide ranging discussion on the key trends and drivers affecting container shipping.

**Keynote #1: Ports, Shipping and...Olympic Logistics!**

The scale of Olympic logistics is truly impressive. At London 2012, 30 million items were forwarded to 34 different venues – including the transportation of over 150,000 pieces of furniture from China. We kick off this year's TOC Europe with a case study of the biggest logistics project ever undertaken.

**Alan Williams, Director, Europe Strategy, UPS**



**Keynote #2: Have Shipping Lines and Terminals Forgotten the Customer?**

Neville Scowen, Overseas Transport Manager, [International Paper](#)

10:00-10:45      **Networking Coffee Break**

10:45-12:45      **SHIPPING WATCH: CARRIER ALLIANCES, SCHEDULES AND THE SUPPLY CHAIN IMPACT**

**P3, G6 and...what's next?**

Further carrier alliances and new service networks are set to have a big impact on east-west container trades. Shippers, forwarders and ports all need to understand how carrier deployments are set to change in the second half of 2014. In this session, a cross-section of senior shipping executives and leading analysts will assess the global liner shipping outlook.

**Key issues:**

- What's on the order book? Analysing containership supply/demand and global fleet capacity
- Are cost-cutting techniques such as slow steaming, idling, and blanked sailings here to stay?
- Will new mega alliances bring freight rate stability or increase price volatility?
- Will non-P3 carriers accelerate ship ordering to become more price competitive?
- Will the advantages of P3 and G6 outweigh the disadvantages for shippers?
- What will be the impact of the new alliances on container terminals?
- How will the cascading of large vessels onto secondary deepsea trades impact terminals?
- Will increased consignment size and transshipment intensity compromise terminal efficiency?
- What can terminals do to anticipate and react to these trends?
- What about even larger vessels (20,000TEU+)?
- How are carriers selecting their port calls? Is cargo generation the main factor?
- The shipper's perspective: How is carrier consolidation impacting supply chains?

**Moderator: John Fossey, Maritime Transport Consultant, [Moffatt & Nichol](#)**

**Presenters:**

**Martin Dixon, Director - Head of Research Products, [Drewry](#)**

**Andrew Penfold, Project Director, [Ocean Shipping Consultants](#)**

**Gary Hodgson, Chief Operating Officer, [Peel Ports Group](#)**

**Anthony Woolich, Partner, [Holman Fenwick Willan](#)**

**Cas Pouderoyen, SVP Global Ocean Freight, [Agility](#)**

**Additional Panellists:**

**Chris Welsh, Secretary-General, [Global Shippers' Forum](#)**

**Carlos Vazquez, Global Category Manager, Ocean Freight Purchasing Organization, [Michelin](#)**



12:45-14:00      **Networking Lunch Break**

**14:00-15:30      OPTIMISING PORT PERFORMANCE: INFRASTRUCTURE, INVESTMENT & INTEGRATION**

Terminal productivity has a critical impact on supply chains. Especially as boxships grow bigger – nearly 80% of new containership capacity coming online over the next few years is expected to be in the super post-Panamax range of 7,500-18,00 teus.

At the same time, port finance and new infrastructure investments have a crucial role to play in meeting the demands of increasing ship size.

Speakers in this session will explore new trends in port finance, the infrastructure required for modern port logistics, and the evolving role of port authorities in facilitating smooth, efficient supply chains.

**Key issues:**

- How is rapidly escalating ship size going to affect port productivity? And will the investments needed to service bigger ships pay off?
- How can ports improve supply chain performance for shippers?
- The carrier's perspective: How can ports create the right conditions for mega vessels?
- How can port authorities increase container throughput and logistics efficiency?
- Is increased throughput on the same foot-print possible?
- Where is the capital coming from for new port investments?
- Case study: Structuring finance for new terminal concessions in West Africa

**Moderator: Jolke Helbing, Consulting Director, ICF International**

**Speaker Panel:**

**David Huck, Port Director, Peel Ports Group**

**Joyce Bliiek, Director Containers & Breakbulk, Port of Rotterdam Authority**

**Simon Sundboell, Group Commercial Manager, Gultainer**

**Gagan Seksaria, CFO & Head – Investments, ICTSI Africa Region**

15:30-16:00      **Networking Coffee Break**

**16:00-17:30      THE BIG INDUSTRY DEBATE: HOT TOPIC ROUNDTABLE DISCUSSIONS**

*No speeches, no power points; just peer-to-peer dialogue and relationship building.*

**Breakout sessions featuring participation from the 'Big Box Shippers Club'**

These hot topic breakout sessions are designed to maximize your networking and learning opportunities. Choose from 6 hot-button industry topics and discuss solutions with your industry peers in an informal roundtable setting.



Each round table will be moderated by a seasoned industry executive or analyst and will include participation from a shipper/BCO.

**Discussion topics include:**

**Table 1:** *Will increased consignment size and transshipment intensity compromise terminal efficiency?*

**Moderator:** **Andrew Penfold, Project Director, Ocean Shipping Consultants**

**Table 2:** *Will the advantages of new mega alliances outweigh the disadvantages for shippers?*

**Moderator:** **Martin Dixon, Director - Head of Research Products, Drewry**

**Table 3:** *How can port authorities increase container throughput and logistics efficiency?*

**Moderator:** **Jolke Helbing, Associate Consulting Director, ICF GHK**

**Table 4:** *What more can be done to make container supply chains more environmentally sustainable?*

**Angie Farrag-Thibault, Associate Director, BSR & Clean Cargo Working Group**

**Table 5:** *Where is the capital coming from for new port investments?*

**Berend R. Paasman, SVP Shipping, Offshore and Logistics, DNB Bank ASA**

**17:30**

**OFFICIAL EVENING NETWORKING RECEPTION**

Join colleagues old and new for the official TOC Europe Day 1 networking reception. Be sure to bring a fistful of business cards for what promises to be a lively summer's evening.

**Conference Day 2 | Wednesday 25 June**

**09:30-11:00 MARKET BRIEFING: PORTS AND LINER SHIPPING ACROSS RUSSIA & THE BALTICS**

Russia's turbulent port scene is heating up. Last September, Russia's number one operator Global Ports Investments bought out close rival NCC Group. The \$1.6bn deal follows the introduction of APM Terminals into the Global Ports shareholder base, with the Danish operator now holding around 31% of shares after the NCC acquisition.

Meanwhile, FESCO continues to be a major player. The largest intermodal transport operator in Russia also provides port and container shipping services. In this special market briefing, speakers will provide a detailed overview of the Russian port and shipping market, including an analysis of the Baltic trades.



**Key issues:**

- Key container port and shipping facts, figures and trends for Russia and the Baltics
- How is consolidation between port operators affecting Russian container trades?
- Where are the new opportunities for Russian trade with the Far East?
- Where does Russian intermodal transport need improving?
- What will be the future for Baltic feeder trades? And how is ship design set to develop?
- What will P3 or other alliances affect container trades in Russia and the Baltics?
- How to be an efficient feeder port in a the highly competitive North European Market
- What potential is there for cargo generation within the Baltic-Adriatic corridor?
- What potential is there for further intermodal development in the Baltics?

**Moderator: Olga Fialkina, Director General, [SeaNews](#)**

**Speaker Panel:**

**Ruslan Alikhanov, President and CEO, [FESCO Transportation Group](#)**

**Andrey Naraevskiy, Director Liner and Business Development, [Global Container Service](#)**

**Dirk Visser, Senior Shipping Consultant, [Dynamar B.V.](#)**

**11:00-11:45      Networking Coffee Break**

**11:45-13:15      GOING BEYOND THE GATE: ATTRACTING UNTAPPED CLIENTS AND CARGO FLOWS VIA INLAND LOGISTICS SERVICES**

Terminal operators are targeting new types of customers by providing inland logistics services. Rather than simply focussing on shipping lines, new opportunities can be found by looking inland to serve local importers and exporters. These services include trucking, haulage, intermodal networks, reefer depots, dry ports, equipment leasing, and container repair shops.

Speakers in this session will investigate the challenges and opportunities faced by terminal operators as they head inland searching for new untapped clients and cargo flows.

**Key issues:**

- When should terminal operators be providing inland logistics services?
- How can terminal operators maximise revenue via inland services in emerging markets?
- How can ports implement integrated port-hinterland logistics services?
- How can ports, terminals and rail companies identify and develop new freight corridors?
- Should terminal operators set up specialist logistics departments to develop new clients?
- How can terminals provide fast, efficient terminal-to-warehouse logistics?
- How can terminal operators compete with existing inland logistics providers?
- What aspects of inland services need improving to better serve cargo owners?



**Moderator: Christian Blauert, Managing Director, HPMport Project & Management**

**Consultants**

**Speaker Panel:**

**Paul Jacob Bins, Managing Director - Benelux & France, Euroports**

**Alexandre Gallo, General Manager, Novatrans**

**Stephen Carr, Head of Commercial Strategy, Peel Ports**

**Peter Ward, Cargo Supply Chain Commercial Manager, DP World London Gateway**

**13:15-14:45**      **Networking Lunch Break**

**14:45-16:15**      **EUROPE'S REGIONAL SHIPPING NETWORKS: SHORT SEA SHIPPING & THE FUTURE FOR FEEDERS**

Short sea and feeder services are integral to competitive container supply chains. Short sea networks can create effective multimodal logistics chains, whilst dedicated feeder lines provide vital transshipment services for the deep sea trades.

How is intra-European trade evolving alongside deep sea and transshipment services? Is port overcapacity a major danger? Key industry stakeholders take the stage to assess the outlook for Europe's regional shipping networks.

**Key issues:**

- What's the short and mid-term outlook for intra-European trade?
- What cargoes are driving Europe's short sea networks?
- How can short sea networks be further integrated into multimodal logistics chains?
- How can short sea services become more competitive in comparison to alternative transport modes?
- A Digital Ecosystem for the Transport Logistics Industry
- How can ports create the right environment for efficient short sea shipping?
- How will transshipment be affected by the increasing use of mega vessels on major routes?
- What makes Europe's key transshipment hubs attractive to carriers?
- What do the new IMO regulations on Emissions Control Areas (ECAs) mean for carriers and shippers?
- How can ports play a more active role in developing common feeder networks?

**Speaker Panel:**

**Koert Luitwieler, Shipping Director, BG Freight Line**

**Helge Neumann-Lezius, Trade Manager Intra-Europe, Kuehne + Nagel**

**Ben Hackett, President, Hackett Associates**

**Bill Karakostas, iCargo**

**Airam Diaz, Commercial Director, Ports of Tenerife**

**16:15-17:30**      **'Happy Hour' and networking in the exhibition hall**



## Conference Day 3 | Thursday 26 June

### 10:30-12:00 SAFETY ALONG THE MARITIME LOGISTICS CHAIN: CONTAINER PACKING AND WEIGHING WORKSHOP

There are few issues more uniting in container shipping than human safety. An overweight and/or incorrectly packed container can be hugely dangerous on multiple occasions throughout its journey: on the road, in the port, and whilst at sea.

Therefore the safe packing of containers is high on the agenda for industry bodies, regulators and insurers. At the same time, there has been mixed reactions to new regulations introduced by the IMO requiring the verification of container weights.

In this workshop-style session, speakers will present on best practice in container packing and debate the implications of the new regulations on container weighing.

#### Key issues:

- What are the key factors for the safe and efficient packing of containers?
- How to combat bad practice in warehouses and other packing facilities
- Should the IMO regulations have gone further to introduce mandatory pre-shipment container weighing?
- What method should be used to verify container weights?
- Which technologies should be used?
- Will the regulations add significant costs and supply chain delays?
- How can any such costs be overcome?

**Moderator:** Richard Clarke, Director, [Richard Clarke Marine](#)

#### Speakers:

**Chris Welsh**, Secretary-General, [Global Shippers' Forum](#)

**Paula Hamilton**, Assistant Secretary, Dockers' Section, [International Transport Workers' Federation](#)

**Bill Brassington**, Consultant, [ETS Consulting](#)

**Lars Meurling**, Vice President & Marketing Director, [Bromma Conquip](#)  
Senior Representative, [ICHCA](#)

11:30-12:00 **Networking Coffee Break**

### 12:00-13:00 CONFERENCE ROUND UP, CONCLUSIONS & KEY TAKEAWAYS

To conclude this year's conference, this 'round up' session will feature moderators from previous sessions in a panel discussion format. Taking a bird's eye view on the critical issues debated this week, speakers will look back on the major themes to emerge over the past two days and arm you with the key takeaways and knowledge needed to advance your business.

Conference | Exhibition | Networking | Free Seminars | Port Tour

**TOC Europe** | 24 - 26 June 2014 | ExCeL, London, UK

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## Recent feedback for TOC Events

*"I wanted to thank TOC for the excellent organization! The sessions we joined were really good and all Adidas participants enjoyed it."*

Mustafa Karagoz, **Adidas**

*"It has been a pleasure and a privilege to take part in the TOC Conference. The whole event was very professionally organized and well run. I was impressed by the quality of the panels, the speakers and the discussions, and enjoyed the company of the participants. I'm sure we all share the feeling that the TOC is a unique and valuable arena for exchanging ideas and insights in our industry."*



Nissim Yochai, VP Corporate Customer Relations, **ZIM**

*"I see TOC as a great forum which brings customers and vendors together. A forum like TOC encourages both parties to understand the challenges that the container transport industry currently faces and work in partnership to meeting these challenges."*

Colin de Souza, VP North South Trades Management Europe, **MOL**

*"I liked the TOC Europe conference very much, due to the broad audience and international focus"*

Tom Tillemans, Head of Logistics Network Development, **Heinz**

*"With panels that include Shippers, Carriers, Ports, and Terminal Operators, TOC is definitely an opportunity to learn more about our industry. Hearing all the ideas in free speaking discussions is helping the stakeholders to forge themselves an idea of the future for container shipping".*

Alexandre Gallo, VP Intermodal, **CMA CGM**

[www.tocevents-europe.com/csc](http://www.tocevents-europe.com/csc)