

Tuesday, 8 October 2019 2019 年 10 月 8 日 周二

▶ 3:00 — 6:30 PM

Registration 注册

Location: Hotel Lobby

地点：酒店大堂

Sponsored by Prince Rupert Port Authority

赞助商 鲁珀特王子港

▶ 12:30 — 2:30 PM

Shipper Roundtable (Mandarin)

货主圆桌会议（普通话）

Location: Madrid 2

地点：马德里二号厅

BY INVITATION ONLY FOR MANDARIN-SPEAKING SHIPPERS 仅限讲普通话的货主受邀参会

A special, off-the-record discussion and a preview of the issues dominating today's containerized ocean shipping industry. Please inquire at the registration desk if you are interested in signing up for the Shipper Roundtable sessions.

针对当今集装箱航运业主要问题而进行的一个特别的，非正式讨论和预先评述。如果您有兴趣报名参加货主圆桌会议，请至注册台咨询。

Roundtable Leaders 圆桌会议主讲人

Turloch Mooney, Senior Editor, Global Ports, JOC, Maritime & Trade, IHS Markit
(Presenting the JOC Container Shipping Outlook)

Turloch Mooney, 全球港口高级编辑, JOC, 海事与贸易, 埃信华迈 (IHS Markit) (讲解 JOC 集装箱航运展望)

Han Ning, Director and Country Manager, China, Drewry Maritime Advisors, (Presenting on Supply Chain Digitization)

韩宁, 德鲁里航运咨询总监兼中国区经理 (讲解供应链数字化)

Yating Xu, Senior China Economist, IHS Markit (Presenting on US-China Trade Tensions and the Chinese Economy)

许亚婷, 中国经济高级分析师, 埃信华迈 (IHS Markit) (讲解中美贸易紧张局势与中国经济)

▶ 3:00 — 5:00 PM

Shipper Roundtable (English)

货主圆桌会议（英语）

Location: Madrid 2

地点：马德里二号厅

BY INVITATION ONLY FOR ENGLISH-SPEAKING SHIPPERS 仅限讲英语的货主受邀参会

A special, off-the-record discussion and a preview of the issues dominating today's containerized ocean shipping industry. Please inquire at the registration desk if you are interested in signing up for the Shipper Roundtable sessions.

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Sponsored by INTTRA

赞助商 INTTRA

Roundtable Leaders 圆桌会议主讲人

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

Greg Knowler, 欧洲高级编辑, JOC, 海事与贸易, 埃信华迈 (IHS Markit)

Philip Damas, Director and Operational Head, Drewry Supply Chain Advisors

Philip Damas, 德鲁里供应链咨询董事兼运营负责人

▶ 5:00 — 6:15 PM

Welcome Reception 欢迎酒会

Location: Pipette's Intercontinental Shenzhen

地点：深圳华侨城洲际大酒店 Pipette 法国餐厅

Wednesday, 9 October 2019

2019 年 10 月 9 日 周三

▶ 7:30 AM — 6:00 PM

Registration 注册

Location: Hotel Lobby

地点：酒店大堂

Sponsored by Prince Rupert Port Authority

赞助商 鲁珀特王子港

▶ 7:30 — 8:30 AM

Welcome Coffee & Tea 迎宾茶会

Location: España Ballroom Foyer

地点：西班牙宴会厅前厅

▶ 8:30 — 9:00 AM

Welcome Remarks 欢迎致辞

Location: España Ballroom I

地点：西班牙宴会厅 1

Shane Akeroyd, President, Asia Pacific and Global Head of Account Management, IHS Markit

Shane Akeroyd, 总裁, 亚太及全球客户管理负责人, 埃信华迈 (IHS Markit)

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

Turloch Mooney, 全球港口高级编辑, JOC, 海事与贸易, 埃信华迈 (IHS Markit)

Guest Speaker 特邀嘉宾

Mr. Liu Qingsheng, Member of the Standing Committee of CPC Shenzhen Municipal Committee, Deputy Mayor of Shenzhen Municipal People's Government

刘庆生, 深圳市委常委, 市政府副市长

▶ 9:00 — 9:30 AM

Keynote Address 主旨演讲

Location: España Ballroom I

地点：西班牙宴会厅 1

Wang Haimin is executive vice president of China Cosco Shipping. Over a 20-year career in corporate management in the shipping industry, Wang has held numerous senior management positions within Cosco, and was also co-CEO and executive director of OOCL. In his keynote address for TPM Asia 2019, Wang will share his thoughts on the major trends in the global and regional container shipping sector from his perspective as a member of the senior leadership team of one of the world's largest container shipping companies and China's largest container ship operator. Among other things, he will share his thoughts and expectations for the major container trades; the challenge of industry decarbonization and the approaching deadline for IMO-imposed limits on sulfur emissions; carrier profitability, sector consolidation and capacity issues; expected structural and business changes in the container shipping industry over the coming years, and the effect of changes in the US-China trade relationship on the container shipping sector.

王海民先生现任中国远洋海运集团 (China Cosco Shipping Corp) 副总经理。他在航运业企业管理领域工作了逾 20 年，曾经在中远海运集团担任多个高级管理职位，还曾经担任东方海外公司 (OOCL) 联合首席执行官和执行董事。王海民先生将在 2019 年泛太平洋海运亚洲大会上发表主旨演讲，从全球最大集装箱航运公司之一和中国最大集装箱船运营商高级领导团队成员的视角，分享他对全球和地区集装箱航运业主要趋势的看法。王海民先生将分享他对主要集装箱贸易的想法和期望，另外还会讨论以下多个方面：行业脱碳的挑战；日益迫近的国际海事组织硫排放限制期限；班轮公司盈利能力、行业整合和运能问题；未来几年预计将会发生的集装箱航运业结构和业务变化；中美贸易关系变化对集装箱航运业正在产生的影响。

Speaker Introduction 介绍人

Turloch Mooney, Senior Editor, Global Ports, JOC, Maritime & Trade, IHS Markit
Turloch Mooney, 全球港口高级编辑, JOC, 海事与贸易, 埃信华迈 (IHS Markit)

Keynote Speaker 主旨演讲人

Wang Haimin, Executive Vice President, China Cosco Shipping Corporation
王海民, 中国远洋海运集团副总经理

TUESDAY 周二

WEDNESDAY 周三

THURSDAY 周四

▶ 9:30 — 10:00 AM

The Global and Asia-Pacific Economic Outlook, 2019-2021 2019-2021 年全球及亚太地区经济展望

Location: España Ballroom I

地点：西班牙宴会厅 1

The global economy was hit by good and bad news over the summer as several major economies cut interest rates and enacted fiscal stimulus while the US-China trade war intensified. IHS Markit projects 2.3 percent real GDP growth this calendar year and next for the United States, reflecting in part the additional fiscal stimulus and upward revisions to employee compensation in recent quarters. The rising probability of a “no-deal” Brexit as well as prospects of snap elections in Italy and the UK have worsened the business environment for European businesses with GDP growth projected to slow to 1.0 percent and 1.4 percent in Europe and the United Kingdom in 2019. Anticipating that China would partially offset the adverse impact of new tariffs with additional policy stimulus, IHS Markit’s August forecast expects real GDP growth to be 5.8 percent in 2020 and 5.7 percent in 2021. The trade war is negatively impacting emerging markets, particularly in Asia, by disrupting supply chains, pushing down commodity prices and pummeling exports. This session will assess the global and Asia-Pacific macroeconomic outlook, including US and Eurozone growth prospects and the prospects for the Chinese economy over the medium term. The presentation also will provide an assessment of the US-China trade and technology wars and spillover effects to other Asian economies, as well as the growth opportunities and risk landscape in key emerging markets in South and Southeast Asia.

全球经济在今年夏季可谓喜忧参半：多个主要经济体调低利率并实施财政刺激措施，但中美贸易战却愈演愈烈。埃信华迈 (IHS Markit) 预计美国当前和下一日历年度的实际 GDP 增长率为 2.3%，部分反映出最近几个季度实施的额外财政刺激以及雇员薪酬增长。“无交易”脱欧可能性大增，加上意大利和英国很可能提前举行大选，都导致欧洲企业商业环境恶化，预计欧洲及英国的 2019 年 GDP 增长率将分别减慢至 1.0% 和 1.4%。埃信华迈 (IHS Markit) 预计中国将通过更多政策刺激来部分抵消美国新增关税的不利影响，并由此在 8 月份预测中国 2020 年和 2021 年的实际 GDP 增长率分别为 5.8% 和 5.7%。中美贸易战严重扰乱了供应链、压低商品价格并且打击出口，对新兴市场尤其是亚洲新兴市场产生巨大的负面影响。本次会议将分析全球及亚太地区宏观经济前景，包括美国和欧元区的增长前景以及中国经济的中期前景。此次演讲还将分析中美贸易战和科技战及其对亚洲其他经济体的溢出效应，并阐述南亚和东南亚主要新兴市场面临的增长机会和风险。

Sponsored by DaChan Bay Terminals
赞助商 大铲湾码头

Session Introduction 介绍人

Jessica Qi, General Manager, Customer Experience, DaChan Bay Terminals
齐媛媛, 总经理, 客户服务, 大铲湾码头

Speaker Introduction 介绍人

Turloch Mooney, Senior Editor, Global Ports, JOC, Maritime & Trade, IHS Markit
Turloch Mooney, 全球港口高级编辑, JOC, 海事与贸易, 埃信华迈 (IHS Markit)

Featured Speaker 主讲人

Yating Xu, Senior China Economist, IHS Markit
许亚婷, 中国经济高级分析师, 埃信华迈 (IHS Markit)

▶ 10:00 — 10:30 AM

Networking Coffee Break 社交茶歇

Location: España Ballroom Foyer
地点: 西班牙宴会厅前厅

▶ 10:30 — 11:30 AM

Container Shipping Outlook: What New Trade Dynamics Mean on the Global Stage

集装箱航运展望: 新的贸易态势在全球舞台上意味着什么

Location: España Ballroom I
地点: 西班牙宴会厅 1

Profitability this year remains a moving target for container shipping lines, and unpredictable trade flows out of Asia and poor supply-demand fundamentals are clouding the container shipping outlook. Trade tensions on the trans-Pacific are changing demand patterns among US shippers, and beneficial cargo owners (BCOs) are reporting tight space at loading ports in China and Vietnam. Carriers are responding by adjusting schedules and adding capacity to Southeast Asian strings as BCOs shift sourcing from China to avoid US tariffs. But the shipping lines in the summer also blanked seven sailings to the West Coast and two to the East Coast, preferring to cut capacity and add extra loaders if required. Compounding the demand uncertainty is the Jan. 1 implementation date of the IMO 2020 low-sulfur fuel regulation that will become compulsory when annual contracts still have four months to run. The headhaul trade from Asia to Europe is facing its own challenges, with poor supply-demand fundamentals leading to aggressive capacity management by carriers that blanked sailings totalling 150,000 TEU during July and August. Then there is intra-Asia, the world's largest container shipping trade and one of the most volatile.

BIMCO reports weakness building in the trade this year and believes it's a signal of declining export orders, prompting the global shipping association to forecast slowing Asia-Europe demand in the coming months. That is certainly supported by data from Container Trades Statistics, which shows that Asia-Europe volume growth has been declining steadily since March. It's a complicated picture, but this high-profile panel of shipping experts will make sense of it all when it examines container shipping profitability, digs into capacity and demand on the major Asian trades, and analyzes the container shipping challenges ahead.

对于集装箱航运公司而言，今年的赢利情况仍然捉摸不定。不可预测的亚洲出口贸易流量，加上供需基本面不佳，正为集装箱航运前景蒙上阴影。泛太平洋地区的贸易紧张局势正在改变美国货主的需求模式，而货主则发现中国和越南的装货港口出现空间紧张情况。随着货主将采购从中国转移以避美国关税，班轮公司正通过调整船期表并增加东南亚航线运能来应对。但是航运公司在今年夏季也取消了七个到美国西海岸和两个到美国东海岸的航班，必要时他们更愿意削减运能并增加更多装卸设备。国际海事组织 (IMO) 2020 的低硫燃料法规让需求不确定性变得更加复杂，该法规将于 1 月 1 日强制实施，此时还有四个月的年度合同需要履约。从亚洲到欧洲的往程贸易航线自身也面临多种挑战，供需基本面不佳导致班轮公司采取激进式运能管理，在 7 月和 8 月期间取消了总计 15 万标箱的航班。此外还有亚洲区内贸易，这是世界上最大也是最不稳定的集装箱航运贸易之一。BIMCO 报告称今年亚洲区内贸易出现疲软，并认为这是出口订单下滑的信号，全球航运协会据此预测未来几个月的亚欧集装箱航运需求将放缓。集装箱贸易统计 (Container Trade Statistics) 的数据明确支持这一点，这些数据显示自三月以来亚欧运量增幅一直稳步下降。总体局面复杂，但这个高规格的航运专家小组将探讨集装箱航运赢利能力，研究主要亚洲贸易航线的运能和需求，分析未来的集装箱航运挑战，从而帮助您理解这一切。

Sponsored by HUTCHISON PORTS YANTIAN

赞助商 和记港口盐田国际

Session Introduction 介绍人

William Pang, Chief Commercial Officer, HUTCHISON PORTS YANTIAN
彭戡，商务行政总监，和记港口盐田国际

Speaker Introduction 介绍人

Greg Knowler, Senior Editor, Europe, JOC, Maritime & Trade, IHS Markit
Greg Knowler，欧洲高级编辑，JOC，海事与贸易，埃信华迈 (IHS Markit)

Panelists 专场嘉宾

Philip Damas, Director and Head, Drewry Supply Chain Advisors
Philip Damas，德鲁里供应链咨询董事兼运营负责人

Parash Jain, Global Head of Shipping and Ports Equity Research, and the Head of Transport Research, HSBC
简荣泽，全球航运和港口股权研究兼运输研究负责人，汇丰银行

Rahul Kapoor, Vice President and Head of Research and Analytics, Maritime & Trade, IHS Markit
Rahul Kapoor，副总裁兼研究与分析负责人，海事与贸易，埃信华迈 (IHS Markit)

Steve Saxon, Partner, McKinsey & Co.
Steve Saxon，合伙人，麦肯锡

▶ 11:30 AM — 12:30 PM

View From the Top: A Discussion With Industry Leaders

高端视点：与行业领导者探讨

Location: España Ballroom I

地点：西班牙宴会厅 1

What is the perspective and outlook of industry leaders as we get deeper into 2019, a year that could prove to be pivotal for international logistics, especially for those BCOs involved in the volatile trans-Pacific trade? As we look forward into 2020 and beyond, how do industry leaders see their segments of the industry evolving? How can cargo owners and service providers manage the US-China tariffs and the shifting trade flows that are the result? What will be the impact of regulatory mandates such as the IMO 2020 low-sulfur fuel regulation and tough new European emission targets? In this leadership session, a panel of industry executives will engage in a lively discussion on what lies ahead for cargo owners importing and exporting containers from Asia.

2019 年可能成为国际物流的一个关键年份，对于那些参与充满波动的泛太平洋贸易的货主而言尤其如此，随着我们进入 2019 年的后半段，行业领导人会有怎样的观点和展望？当我们展望 2020 年及以后，行业领导人如何看待他们各自行业领域的发展？货主和服务提供商如何应对中美关税及其导致的贸易流量转移？诸如国际海事组织 (IMO) 2020 低硫燃料法规和欧洲严格的新排放目标等监管性要求将会产生什么影响？在这次领导人会议上，由行业高管组成的一个研讨小组将热烈讨论从亚洲进口和出口集装箱的货主在今后面临的情况。

Session Chair 主持人

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

Peter Tirschwell, 副总裁，海事与贸易，埃信华迈 (IHS Markit)

Panelists 专场嘉宾

Mathieu Biron, Managing Director, Global Freight Forwarding, Kerry Logistics

Mathieu Biron, 董事总经理，全球货运代理，嘉里物流

Silvia Ding, Senior Vice President and Global Head of Ocean Product, Maersk Line

丁泽娟，高级副总裁，全球海运产品负责人，马士基航运

Peter J. Levesque, CEO, Modern Terminals

李国维，行政总裁，现代货箱码头有限公司

Willy Lin, Chairman, Hong Kong Shippers' Council and Hong Kong Productivity Council

林宣武，香港付货人委员会主席和香港生产力促进局主席

▶ 12:30 — 1:30 PM

Networking Lunch 午餐

Location: España Ballroom II and Barcelona

地点：西班牙宴会厅 2 和巴塞罗那厅

Sponsored by Enterprise Florida and Florida Ports Council

赞助商 Enterprise Florida 和 Florida Ports Council

▶ 1:30 — 2:30 PM

Changing US Trade Policy and the Impact on Regional and Global Trade Patterns

充满变数的美国贸易政策及其对地区和全球贸易格局的影响

Location: España Ballroom I

地点：西班牙宴会厅 1

US President Trump Donald Trump on Aug. 1 said the United States would initiate 10 percent tariffs on a further US\$300 million of Chinese imports from Sept. 1, effectively meaning all Chinese imports to the US would be subject to tariffs. A week later, China allowed its currency to weaken to below 7 yuan to the US dollar for the first time since 2008. The People's Bank of China said the move was a response to "unilateralism and trade protectionism measures" on the part of the US, and the Trump administration formally branded China a currency manipulator. These moves, together with more hard-line rhetoric coming from both sides, represent the kind of serious escalation in the trade war between the world's two biggest economies that many international supply chain interests sorely hoped would never happen and sector observers such as IHS Markit are now predicting that a "comprehensive trade agreement is unlikely in the one-year outlook." The existing tariffs already are having a serious and direct impact on trade volumes: Chinese exports to the US in the first half of 2019 fell by more than 8 percent to just less than US\$200 billion, while imports plunged nearly 30 percent to about US\$60 billion. Even if a deal is reached — and mechanisms are introduced to enforce terms to the satisfaction of both governments — the residual impact on trade flows and trade volumes could be a lasting one. This session will look at the objectives and agendas underpinning changing US trade policy and the impact of the trade war on volumes and patterns of trade. It will present scenarios for the short-, medium- and long-term development of the US-China trading relationship, including the likelihood of a deal, what such a deal might entail, and how it ultimately could affect patterns and volumes of regional and global trade.

TUESDAY 周二

WEDNESDAY 周三

THURSDAY 周四

美国总统特朗普于 8 月 1 日声称，美国将从 9 月 1 日起对进口自中国的剩余 3000 亿美元商品加征 10% 的关税，这实际上意味着所有中国输美商品均被加征关税。一周后，中国政府允许人民币兑美元汇率自 2008 年以来首次跌破 7 元大关。中国人民银行表示此举是为了回应美国和特朗普政府正式将中国列为汇率操纵国的“单边主义和贸易保护主义行为”。这些举动以及双方的更强硬言论代表了世界两大经济体之间的贸易战严重升级，这是国际供应链众多利益相关方永远不希望看到的局面，埃信华迈 (IHS Markit) 等行业观察机构现在预测双方“在一年内不可能达成全面的贸易协议”。目前关税已经对贸易量产生严重且直接的影响：中国在 2019 年上半年对美国出口下降了 8% 以上，达到略低于 2000 亿美元，而进口则骤降了近 30%，达到约 600 亿美元。即便两国很快达成协议，并且引入多种机制来确保协议的实施会让两国都感到满意，但贸易流和贸易量仍可能受到持久的残留影响。本次会议将讨论美国贸易政策变化背后的意图和筹划以及贸易战对贸易量和贸易模式的影响。会上将阐述中美贸易关系的短期、中期和长期发展情景，包括达成协议的可能性，此类协议可能带来的影响，以及如何最终影响地区和全球贸易的模式和数量。

Session Chair 主持人

Turloch Mooney, Senior Editor, Global Ports, JOC, Maritime & Trade, IHS Markit
Turloch Mooney, 全球港口高级编辑, JOC, 海事与贸易, 埃信华迈 (IHS Markit)

Panelists 专场嘉宾

Nicholas Kwan, Research Director, Hong Kong Trade Development Council
关家明, 研究总监, 香港贸易发展局

Wolfgang Lechmacher, Supply Chain and Technology Strategist, Former Head of Supply Chain and Transport Industries, World Economic Forum

Wolfgang Lechmacher, 供应链及技术顾问, 前供应链及运输业负责人, 世界经济论坛

Alan Murphy, CEO and Founder, Sea-Intelligence ApS

Alan Murphy, 首席执行官兼创始人, Sea-Intelligence ApS

▶ 2:30 — 3:30 PM

Sourcing Diversification and Production Fragmentation: The Impact on Supply Chains and Container Shipping 采购多样化和生产分散化：对供应链和集装箱航运的影响

Location: España Ballroom I

地点：西班牙宴会厅 1

The US-China trade war has ratcheted up the urgency of where to source at retail, consumer product, and other companies. It's not a new challenge: The history of low-cost manufacturing has been a history of Asian economic development. In the 1970s, a resurgent Japanese economy dominated the manufacturing world, then production moved to the four "Asian Tigers" of Taiwan, Hong Kong, South Korea, and Singapore before being comprehensively taken over by China in the 1990s. In 2018, tariffs became a new element in the mix. US tariffs imposed on Chinese-made

products and Beijing's retaliatory tariffs on goods imported from the US have accelerated a manufacturing shift out of China that has been underway for several years as the cost of labor and complying with environmental regulations increased. The good news for container shipping is that the production is largely remaining in Asia, with countries such as Vietnam, India, and Indonesia the beneficiaries. Vietnam's exports to the US grew 9 percent in the first three quarters of 2018 to 855,886 TEU, Indian exports to the US rose by 13.4 percent to 548,954 TEU, and Indonesia's US exports rose 1.8 percent to 280,710 TEU, according to JOC parent company IHS Markit. But the shift in sourcing from China to factories in South and Southeast Asia comes with additional complexities for US importers. The countries have poor road and port infrastructure, the lead times are less reliable, transit times are longer, vessels call with less frequency, there is a greater need for transshipment, plus a general increased workload for procurement teams that must tame new vendors and drive best practices. This session will examine the impact of shifting manufacturing on shipper sourcing strategies in Asia, what costs are being added to their supply chains and how to manage those costs, and whether container shipping is adapting to the shifting trade flows.

中美贸易战加剧零售、消费品和其他企业寻找采购来源的紧迫性。这并非新的挑战：低成本制造贯穿了亚洲经济发展的历史。在 20 世纪 70 年代，实现复兴的日本经济主导了全球制造业，然后生产转移到“亚洲四小龙”——中国台湾、中国香港、韩国和新加坡，并在 20 世纪 90 年代被中国大陆全面接管。在 2018 年，关税成为贸易格局中的一个新元素。美国对中国制造商品加征关税以及中国对进口自美国的商品征收报复性关税已导致制造业加速从中国外迁。在中国，随着劳动力成本和遵守环境法规的成本不断上升，多年来一直在发生制造业外迁。对于集装箱航运的好消息是这些生产大多仍留在亚洲，越南、印度和印尼等国家成为受益者。据 JOC 母公司埃信华迈 (IHS Markit) 的数据，在 2018 年前三季度，越南对美出口增长 9% 至 855,886 标箱，印度增长 13.4% 至 548,954 标箱，印尼增长 1.8% 至 280,710 标箱。但是，离开中国转而从南亚和东南亚工厂采购，让美国进口商面临更多复杂性。这些国家的公路和港口基础设施较差，交货时间不太可靠，运输时间较长，货轮停靠频率较低，需要更多转运，而且采购团队必须培植新供应商并推行最佳实践，这普遍增加了工作负荷。本次会议将探讨制造业转移对货主在亚洲采购策略的影响，供应链中增加了哪些成本，如何管理这些成本，以及集装箱航运是否正在适应不断变化的贸易流。

Sponsored by Shekou Container Terminals Ltd.

赞助商 蛇口集装箱码头

Session Introduction 介绍人

Tony Zhao, DGM of commercial department, Shekou Container Terminals Ltd.

赵亦松，商务部副经理，蛇口集装箱码头

Session Chair 主持人

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

Greg Knowler, 欧洲高级编辑, JOC, 海事与贸易, 埃信华迈 (IHS Markit)

Panelists 专场嘉宾

Michael Crotty, Founder and President, MKT & Associates

Michael Crotty, 创始人兼总裁, MKT & Associates

Darren Field, Executive Vice President, Intermodal, J.B. Hunt Transport Services

Darren Field, 执行副总裁, 多式联运, J.B. Hunt Transport Services

Ben Simpfordorfer, Founder and CEO, Silk Road Associates

Ben Simpfordorfer, 创始人兼首席执行官, Silk Road Associates

Jane Singer, Managing Director, Inside Fashion

Jane Singer, 董事总经理, Inside Fashion

▶ 3:30 — 4:00 PM

Networking Coffee Break 社交茶歇

Location: España Ballroom Foyer

地点: 西班牙宴会厅前厅

Sponsored by Venable LLP

赞助商 Venable LLP

▶ 4:00 — 4:30 PM

TPM Asia Accelerator: The Greater Bay Area and its Relevance for Manufacturing, Sourcing, Logistics, and Trade-Services

TPM 亚洲加速器：大湾区及其对制造，采购，物流和贸易服务的意义

Location: España Ballroom I

地点: 西班牙宴会厅 1

China's ambitious plan to create stronger links between Hong Kong, Macau, and Zhuhai and eight other cities in the Pearl River Delta aims to create a world-class urban cluster to rival the San Francisco and Tokyo bay areas. Home to 68 million people, accounting for well more than a third of China's exports, and with a GDP larger than that of South Korea, the Greater Bay Area is undeniably huge. But what's the relevance for businesses? Transportation and trade infrastructure are a core part of the plan, with major projects such as the US\$20 billion, 55-kilometer Macau-Zhuhai-Hong Kong bridge already complete and more than 300 new railway stations

and high-speed rail lines under construction. The Qianhai Free Trade Zone and its preferential policies is set to be the area's new central business district. Logistics and trade-related services are set to be among the big winners of the plan's policies, along with advanced manufacturing and digital and technology sectors. For Guangdong-based companies, the planned access to the financial and other services in Hong Kong means they can continue to develop at home and gain the financial muscle to expand overseas and buy world-class brands and technologies. In this highly anticipated presentation, Ben Simpfendorfer, founder and CEO of Hong Kong-based project advisory and consulting firm Silk Road Associates, will take a deep dive into the Greater Bay Area by examining the infrastructure and policies to support companies and industries; outlining the opportunities; and advising companies how to position themselves to take advantage of them.

中国政府雄心勃勃的大湾区计划旨在让香港、澳门、珠海以及珠三角其他八个城市之间建立更紧密联系，从而打造一个与旧金山和东京湾地区相媲美的世界级城市群。拥有 6800 万人口，占中国出口总额的逾三分之一，GDP 大于韩国，大湾区的规模无疑是巨大的。但是对于企业而言有什么意义呢？运输和贸易基础设施是该计划的核心部分，投资 200 亿美元长 55 公里的港珠澳大桥等多个重大项目已经完工，还有 300 多个新的火车站和高速铁路正在建设。享有众多优惠政策的前海自贸区将成为该地区新的中央商务区。物流和贸易相关服务以及先进制造业、数码和技术行业将成为该计划政策的大赢家。根据规划，总部位于广东的公司将能够利用香港的金融和其他服务，这意味着他们可以继续在本土发展，同时又能获得在海外扩张和购买世界级品牌和技术的财务实力。在这次备受期待的演讲中，香港项目咨询公司 Silk Road Associates 创始人兼首席执行官 Ben Simpfendorfer 将带我们深入了解大湾区：他将阐述支持公司和行业的基础设施和政策，就公司如何做好准备来利用它们提供建议。

Sponsored by Chiwan Container Terminals Co. Ltd.

赞助商 赤湾集装箱码头

Session Introduction 介绍人

Jenny Deng, Key Account Manager, Commercial Department, Chiwan Container Terminals Co. Ltd.
邓丽娟, 商务部航线经理, 赤湾集装箱码头

Speaker Introduction 介绍人

Turloch Mooney, Senior Editor, Global Ports, JOC, Maritime & Trade, IHS Markit
Turloch Mooney, 全球港口高级编辑, JOC, 海事与贸易, 埃信华迈 (IHS Markit)

Featured Speaker 主讲人

Ben Simpfendorfer, Founder and CEO, Silk Road Associates
Ben Simpfendorfer, 创始人兼首席执行官, Silk Road Associates

▶ 4:30 — 5:30 PM

Building a Future-Ready Culture in Your Logistics Organization

在你的物流组织中营造面向未来的行业文化

Location: España Ballroom I

地点：西班牙宴会厅 1

Would you recommend logistics as a career to your daughter or son? Unfortunately, the answer to this question for many people continues to be a negative one. As a career choice, logistics suffers from a poor image that suggests long hours, wafer-thin margins, transactional thinking, silo mentality, and lack of focus on innovation and entrepreneurialism. For some time, the industry has been hearing the warnings that without substantial change, it's in danger of becoming irrelevant, outpaced, and boring. A select few companies have heard these warnings and are launching innovative programs to improve, transform, and future-proof their cultures. This session will look at the intentional steps industry leaders need to take to change mindsets and behaviors in order to build future-ready cultures. It will examine how to make innovation and entrepreneurship an integral part of a new industry culture that turns employee experience into an asset for customer experience; develops leaders with future-ready facilitation capabilities; and attracts the right kind of talent and gives it the space it needs to build a bright future.

您是否会建议女儿或儿子从事物流职业？遗憾的是，许多人对这个问题的回答仍然是否定的。作为一种职业选择，物流行业的形象很差，意味着长时间工作、利润微薄、交易型思维、孤岛心态以及缺乏对创新和企业精神的关注。一段时期以来，物流行业一直面临外界的警告：如果没有实质性改变，该行业就有变得脱离潮流、固步自封且无聊乏味的危险。少数几家公司已经听到这些警告，而且正在启动创新计划以改进、转变并营造面向未来的行业文化。本场小组会议将探讨行业领导者需要有意识地采取哪些步骤来改变思维定势和行为方式，从而建立面向未来的行业文化。会上将探讨如何将创新和企业精神作为不可或缺的一部分融入新的行业文化；这种文化应能够将员工经验转化为一种可支持客户体验的资产，培养具有引导能力的未来领导者，吸引合适人才并为其提供建设美好未来所需的空間。

Session Chair 主持人

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

Turloch Mooney, 全球港口高级编辑, JOC, 海事与贸易, 埃信华迈 (IHS Markit)

Panelists 主场嘉宾

Henrik Kofod-Hansen, CEO and Co-Founder, Novosensus

Henrik Kofod-Hansen, 首席执行官和联合创始人, Novosensus

Sanne Manders, Chief Operating Officer, Flexport

Sanne Manders, 首席运营官, Flexport

Jane Singer, Managing Director, Inside Fashion

Jane Singer, 董事总经理, Inside Fashion

▶ 5:30 — 7:00 PM

Networking Reception 社交酒会

Location: The Galleon

地点：船吧

Sponsored by Shenzhen Port

赞助商 深圳港

Thursday, 10 October 2019
2019 年 10 月 10 日 周四

▶ 8:00 AM — 2:00 PM

Registration 注册

Location: Hotel Lobby

地点：酒店大堂

Sponsored by Prince Rupert Port Authority

赞助商 鲁珀特王子港

▶ 8:00 — 9:00 AM

Welcome Coffee & Tea 迎宾茶会

Location: Espana Ballroom Foyer

地点：西班牙宴会厅前厅

TUESDAY 周二

WEDNESDAY 周三

THURSDAY 周四

► 9:00 — 9:05 AM

Welcome Remarks 欢迎致辞

Location: Espana Ballroom I

地点：西班牙宴会厅 1

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

Peter Tirschwell, 副总裁，海事与贸易，埃信华迈 (IHS Markit)

► 9:05 — 9:45 AM

Day 2 Keynote Address 第二天主旨演讲

Location: Espana Ballroom I

地点：西班牙宴会厅 1

Speaker Introduction 介绍人

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

Peter Tirschwell, 副总裁，海事与贸易，埃信华迈 (IHS Markit)

Keynote Address Speaker 主旨演讲人

Nissim Yochai, Executive Vice President, Trans-Pacific Trade, ZIM Integrated Shipping Services

容海迅，跨太平洋航线副总裁，以星综合航运有限公司

► 9:45 — 10:45 AM

IMO 2020: The Low-Sulfur Mandate Is Upon Us 国际海事组织 (IMO) 2020：低硫任务在于我们

Location: Espana Ballroom I

地点：西班牙宴会厅 1

By the fourth quarter of 2019, and maybe even as TPM Asia begins, many vessels deployed by the container shipping lines will be using low-sulfur bunker fuel. Even though the IMO 2020 regulation will only be enforced from Jan. 1, 2020, carriers will have to ensure their bunker supply chain is in place and begin testing availability well in advance of the deadline. But low-sulfur fuel costs over \$100 per ton more than the bunkers currently being used, and if availability can't match demand, there is a fear that prices will rise even further. This panel will look at availability of low-sulfur fuel, the different blends, and the option likely to be adopted by the majority of carriers, as that will have a bearing on price.

截至 2019 年第四季度，甚至在泛太平洋海运亚洲大会开幕时，集装箱航运公司部署的许多货轮都将使用低硫燃料。尽管国际海事组织 (IMO) 2020 法规到 2020 年 1 月 1 日才会正式实施，但班轮公司必须确保燃料供应链准备就绪，并提前很长时间开始测试燃料供应可靠性。与目前所用燃料相比，低硫燃料成本每吨高出 100 美元以上，如果供应无法满足需求，人们担心价格会进一步上涨。本场小组会议将探讨低硫燃料的可用性、不同混合燃料以及大多数班轮公司可能采用的选项，因为这将会对价格产生影响。

Session Chair 主持人

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

Mark Szakonyi, 执行主编, JOC.com 和 The Journal of Commerce, 海事与贸易, 埃信华迈 (IHS Markit)

Panelists 专场嘉宾

Damian Kennaby, Executive Director, Oil, Midstream, Downstream and Chemical, IHS Markit

Damian Kennaby, 执行董事, 中下游石油市场及化工 (OMDC), 埃信华迈 (IHS Markit)

Matt Muenster, Senior Manager, Applied Knowledge, Breakthrough Fuel

Matt Muenster, 公司应用知识高级经理, Breakthrough Fuel

Arne Voller, Seafreight Director, South China Cluster, Kuehne + Nagel

Arne Voller, 海运部总监, 华南及香港澳门地区, 德迅

▶ 10:45 — 11:15 AM

Networking Break 社交茶歇

Location: Espana Ballroom Foyer

地点: 西班牙宴会厅前厅

▶ 11:15 AM — 12:15 PM

Carrier Performance: How to Improve Service Reliability, Visibility, and Reduce the Impact of Delays

班轮公司绩效: 如何提高服务可靠性、可视性并减少延迟影响

Location: Espana Ballroom I

地点: 西班牙宴会厅 1

Session Chair 主持人

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

Greg Knowler, 欧洲高级编辑, JOC, 海事与贸易, 埃信华迈 (IHS Markit)

Panelists 专场嘉宾

Arnaud Coudray, Chief Commercial Officer, APL

Arnaud Coudray, 首席商务官, 美国总统轮船

Alan Murphy, CEO and Founder, Sea-Intelligence ApS

Alan Murphy, 首席执行官兼创始人, Sea-Intelligence ApS

► 12:15 — 1:15 PM

Networking Lunch 午餐

Location: Espana Ballroom II and Barcelona

地点：西班牙宴会厅 2 和巴塞罗那厅

► 1:15 — 2:15 PM

E-Commerce and Supply Chain Models of the Future: B2C Supplants B2B

未来电子商务和供应链模式：B2C 补充 B2B

Location: Espana Ballroom I

地点：西班牙宴会厅 1

Session Chair 主持人

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

Turloch Mooney, 全球港口高级编辑, JOC, 海事与贸易, 埃信华迈 (IHS Markit)

Panelists 专场嘉宾

Kara Cheung, Managing Partner, KCW Associates

Kara Cheung, 执行合伙人, KCW Associates

Nicolas de Loisy, President, Supply Chain Management Outsource, and Co-Founder, Belt and Road Blockchain Consortium

Nicolas de Loisy, 供应链管理外包咨询公司总裁, 一带一路区块链联盟联合创始人

Mark Yong, Managing Director, Asia-Pacific, Blume Global

Mark Yong, 董事总经理, 亚太区, Blume Global

▶ 2:15 — 3:15 PM

Connecting Supply Chain Networks in the Age of Digitization

在数字化时代连通供应链网络

Location: Espana Ballroom I

地点：西班牙宴会厅 1

Container shipping companies, ports, freight forwarders, and other supply chain stakeholders increasingly are looking to create value by controlling data within an integrated network and blockchain initiatives. Mediterranean Shipping Co. and CMA CGM have joined Maersk in its TradeLens blockchain and visibility joint venture with IBM, alleviating fears that the project would not extend to the wider container shipping industry, while CMA CGM, COSCO Shipping, COSCO Shipping Ports, Hapag-Lloyd, Hutchison Ports, OOCL, the Port of Qingdao, PSA International, and Shanghai International Port Group have signed up with the Global Shipping Business Network. More carriers are investing in smart containers from Traxens, and most of the world's global carriers are now members of the Digital Container Shipping Association, a group tasked with creating container data standards for track-and-trace systems. And Rotterdam is among a growing list of ports and terminal operators looking to create efficiencies that alleviate black holes in information between ocean and landside operations that can increase costs for customers. This session will analyze the goals, objectives, and what beneficial cargo owners stand to gain from the digital movement.

在共同实施的一体化网络和区块链项目中，集装箱航运公司、港口、货运代理商和其他供应链相关方正日益寻求通过控制数据来创造价值。地中海航运有限公司 (Mediterranean Shipping Co.) 和达飞海运集团 (CMA CGM) 已经加入马士基集团 (Maersk) 与 IBM 共同开展的 TradeLens 区块链及可见性合作项目，从而打消了外界对于该项目不会扩展到更广泛集装箱航运业的担忧，而达飞海运集团 (CMA CGM)、中远海运 (Cosco Shipping)、中远海运港口 (Cosco Shipping Ports)、赫伯罗特 (Hapag-Lloyd)、和记港口 (Hutchison Ports)、东方海外 (OOCL)、青岛港、新加坡国际港务集团 (PSA International) 和上海国际港务集团 (Shanghai International Port Group) 已与全球航运业务网络 (Global Shipping Business Network) 签约。更多班轮公司正投资采购 Traxens 的智能集装箱，而且全球大多数班轮公司现在都加入了数字集装箱航运协会 (Digital Container Shipping Association)，其宗旨是建立用于跟踪及追踪系统的集装箱数据标准。如同鹿特丹港，越来越多的港口和码头运营商正在寻求提高效率，消除可能导致客户成本增多的海上和陆上作业之间的信息黑洞。本次会议将分析行业数字化行动的目标、目的以及最终货主能够从中获得的益处。

Sponsored by Kuehne + Nagel

赞助商 德迅

Session Introduction 介绍人

Eric Williams, Senior Vice President, Global Head of International Supply Chain, Kuehne + Nagel
Eric Williams, 国际供应链高级副总裁, 德迅

Session Chair 主持人

Peter Tirschwell, Vice President, Maritime & Trade, IHS Markit
Peter Tirschwell, 副总裁, 海事与贸易, 埃信华迈 (IHS Markit)

Panelists 专场嘉宾

Thomas Bagge, CEO & Statutory Director, Digital Container Shipping Association
Thomas Bagge, 首席执行官兼法定董事, 数字集装箱运输协会

Don Z. Chen, Managing Director, Asia, New York Shipping Exchange (NYSHEX)
陈卓阳, 亚洲区总裁, 纽约航运交易所 (NYSHEX)

Hans Nagtegaal, Director, Containers, Port of Rotterdam
Hans Nagtegaal, 集装箱业务总监, 鹿特丹港

Wooyong Shin, Vice President, Logistics Division, Samsung SDS
Wooyong Shin, 物流部副总裁, 三星 SDS

▶ 3:15 PM

Closing Remarks 闭幕致辞

Location: Espana Ballroom I

地点: 西班牙宴会厅 1

Turloch Mooney, Senior Editor, Global Ports, JOC, Maritime & Trade, IHS Markit
Turloch Mooney, 全球港口高级编辑, JOC, 海事与贸易, 埃信华迈 (IHS Markit)