

Newsletter

April 30th 2017

Link road, rail, sea!

Council Of Intermodal Shipping Consultants

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PORTS AND TERMINALS

LONG BEACH PORT BRACING FOR IMPACT OF SHIPPING ALLIANCE REFORMATION

It's been called "The Big Bang of 2017."

An unprecedented number of ocean-carrier mergers last year and the collapse of the seventh-largest container carrier— Hanjin Shipping— have resulted in something Port of Long Beach officials say has never happened in the shipping industry— the reshuffling of ocean carriers from four to three new alliances.

For almost 10 years, ocean carriers have been forming such alliances to save money, with more sailings and fewer ships sharing cargo space on huge vessels.

While the new alliance formation may simply seem like news of yet another merger in today's ever-changing business landscape, shipping officials are bracing for the confusion that the sudden, major changes may bring.

David J. Arsenault, president of Logistics Transformation Solutions and former president of Hyundai Merchant Marine America, spoke about the issue at a "Learning from Hanjin" panel on Feb. 28 at the Journal of Commerce's TPM 2017 Conference at the Long Beach Convention Center.

He said alliances have come and gone, but those changes have been staggered in the past.

"This is a shotgun start," he said, "and it's the first time we've ever seen three mega alliances kick off all at the same time, and it has tremendous upstream and downstream consequences."

According to iContainers, an American company that enables importers and exporters to compare rates in real time and manage their maritime shipments, these three alliances represent 77.2 percent of global container capacity and 96 percent of all East-West trades.

"Ocean Alliance offers the most services, with some 40 loops," according to the company's website.

"THE Alliance follows with 32 services and 2M with 25.

Among the changes, THE Alliance and Ocean Alliance will run 11 weekly Asia-northern Europe routes.

2M has also increased its services on this route from five to six.

That's mainly to cater to the additional slots under their agreement with HMM and Maersk's takeover of Hamburg Süd."



Officials from the Port of Long Beach– the nation's second-busiest seaport– say the new alliances will result in new customers, new destinations and some ships likely moving off routes between Asia and Europe to trans-Pacific routes.

Officials are also preparing for potential delays, since the shifting of cargo on different ships to new terminals with different ways to load and unload and meeting different customer priorities are being further challenged by continuous equipment and terminal velocity issues, which could compound supply-chain challenges.

"It has put a massive supply chain – which includes shippers, ocean carriers, terminal operators, truckers and everyone else in between – on high alert," states an April 3 Port of Long Beach press release.

"One major port chief has already warned beneficial cargo owners and truckers to anticipate 'another wave of confusion' while the three new alliances go through the learning curve of working together to get products to where they need to be in a timely manner."

Arsenault predicts bigger ships arriving at American shores.

"So, we're now going to see, I think, larger vessels in U.S. ports," Arsenault said.

"That's going to certainly start to contribute to challenges with terminals, with trucks, with chassis and all the stakeholders that are there until things get resettled."

The three new shipping associations are 2M Alliance, Ocean Alliance and THE Alliance.

2M includes the two largest ocean carriers, Maersk Line and Mediterranean Shipping Company, with a vessel-sharing agreement with Hyundai Merchant Marine.

Officials say Maersk Line is poised to acquire carrier Hamburg Süd.

Ocean Alliance consists of third-largest ocean carrier CMA CGM (with APL, which CMA CGM acquired in its deal with Neptune Orient Lines), China COSCO Shipping (the newly merged COSCO and China Shipping), Orient Overseas Container Line (OOCL) and Evergreen.

THE Alliance includes Hapag Lloyd (which is merging with United Arab Shipping Company), Yang Ming Ltd., and three Japanese carriers expected to merge into a single company this year: Mitsui OSK Lines (MOL) Ltd., Nippon Yusen Kaisha (NYK) Lines and Kawasaki Kisen Kaisha, Ltd. (K Line).

Port of Long Beach officials say they have been closely monitoring the situation and have been interacting with leadership and operations staff of shipping lines, terminal operators, labor, truckers and railroads.

“Our goal is to make sure our port partners are communicating with each other and coordinating operations,” said Duane Kenagy, interim chief executive for the Port of Long Beach.

“We’ve been facilitating meetings to enable dialogue among our stakeholders.”



According to the Port of Long Beach’s April 3 press release, port officials are partnering with the Port of Los Angeles to work with stakeholders to find opportunities to optimize the supply chain, including better coordination among ocean carriers and rail and terminal facilities to ensure that rail cars and other equipment is readily available.

The press release also states that the Alameda Corridor Transportation Authority has reported that troubleshooting issues associated with rail transport will be critical, considering roughly 40 percent of imports that come through the twin ports depart by rail to destinations all across the nation.

Port officials also say that stakeholders are addressing the availability and location of chassis, the metal-framed trailers that allow trucks to tow containers from Point A to Point B.

"More than two years ago, the twin ports facilitated the Pool of Pools agreement among the three major chassis pools operating in Long Beach and Los Angeles," the release states.

"The agreement frees up more than 72,000 chassis that can be used interchangeably at 13 marine terminals and four rail facilities.

The Pool of Pools has reduced wait time, confusion and other inefficiencies by allowing chassis providers to work together."

Officials say that agreement, which also features data on chassis availability and use, will now be critical.

"In anticipation of the new alliances, the Commercial Operations team and I have spent the past three months assessing readiness and making sure our industry partners are talking and transferring information," said Dr. Noel Hacegaba, managing director of Commercial Operations and Chief Commercial Officer at the Port of Long Beach.

"Communication, collaboration and coordination are critical to ensure a smooth and efficient transition," he said.

Hacegaba added that port officials will continue to engage industry partners and do everything possible to make sure they are ready to handle the new alliance deployments.

"We have demonstrated our ability to handle the biggest ships," he said.

"Now we have an opportunity to demonstrate our agility and flexibility."

(from: hellenicshippingnews.com, April 10th 2017)

MARITIME TRANSPORT

COMMISSION APPROVES ACQUISITION OF HAMBURG SÜD BY MAERSK LINE, SUBJECT TO CONDITIONS

The European Commission has cleared under the EU Merger Regulation the proposed acquisition of container liner shipping company Hamburg Südamerikanische Dampfschiffahrts-Gesellschaft KG (HSDG) of Germany by Maersk Line A/S of Denmark, subject to conditions.

Both Maersk Line and HSDG are active worldwide in container liner shipping.

The clearance is conditional upon the withdrawal of HSDG from five consortia



on trade routes connecting (i) Northern Europe and Central America/Caribbean, (ii) Northern Europe and West Coast South America, (iii) Northern Europe and Middle East, (iv) the Mediterranean and West Coast South America and (v) the Mediterranean and East Coast South America.

insufficient competition after the transaction.

On these routes, the merged entity would have faced

Commissioner Margrethe Vestager, in charge of competition policy, said: 'Competitive shipping services are essential for European companies and for the EU's economy as a whole.'

The commitments offered by Maersk Line and HSDG will maintain a healthy level of competition to the benefit of the very many EU companies that depend on these container shipping services.'

The Commission's competition concerns

The proposed transaction would lead to the combination of two leading container liner shipping companies.

Maersk Line is the largest container shipping company, while HSDG is number nine worldwide.

Like several other carriers, Maersk Line and HSDG offer their services on trade routes through cooperation agreements with other shipping companies.

These are known as 'consortia' or 'alliances' and are based on vessel sharing agreements where members decide jointly on capacity setting, scheduling and ports of call, which are all important parameters of competition.

The Commission examined the effects of the merger on competition in this specific market for container liner shipping on seventeen trade routes connecting Europe with the Americas, Asia, the Middle-East, Africa and Australia/New Zealand.

The Commission found that the merger, as initially notified, would have created new links between the previously unconnected entities Maersk Line and five of the consortia HSDG belongs to (Eurosal 1/SAWC, Eurosal 2/SAWC, EPIC 2, CCWM/MEDANDES and MESA).

According to the Commission's analysis, this would have resulted in anti-competitive effects on the corresponding five trade routes (Northern Europe and Central America/Caribbean; Northern Europe and West Coast South America; Northern Europe and Middle East; Mediterranean and West Coast South America; Mediterranean and East Coast South America).

In particular, these links could have enabled the merged entity to influence key parameters of competition, such as capacity, for a very large proportion of those markets, to the detriment of their commercial customers and, ultimately, of consumers.

The proposed transaction would also create (a) limited links between Maersk Line and HSDG in the markets for short-sea shipping and 'tramp services'

(unscheduled, on demand shipping), as well as (b) limited links between the two companies' activities in container liner shipping and the container terminals, harbour towage, freight forwarding, container manufacturing and inland transportation sectors where Maersk Line or other companies belonging to the Maersk Group are active.



However, in both areas, the Commission found no competition concerns, in particular because several other service providers are active in these markets.

The proposed commitments

In order to address the Commission's competition concerns, Maersk offered to terminate the participation of HSDG in the five consortia (Eurosal 1/SAWC, Eurosal 2/SAWC, EPIC 2, CCWM/MEDANDES and MESA).

This will entirely remove the problematic links between Maersk Line and HSDG's consortia that would have been created by the transaction.

HSDG will continue to operate as part of the five consortia during the notice period to guarantee an orderly exit.

However, a monitoring trustee will ensure that no anti-competitive information is shared between these five consortia and the merged entity during that notice period.

In view of the proposed remedies, the Commission concluded that the proposed transaction, as modified, would no longer raise competition concerns. The decision is conditional upon full compliance with the commitments.

Companies and products

HSDG operates 130 container vessels.

HSDG markets its services through its global Hamburg Süd brand and its CCNI (Chile) and Aliança (Brazil) brands.

HSDG is a member of several consortia and in particular:

Trade route	Consortium
Northern Europe to Central America / Caribbean	Eurosal 1/SAWC
Northern Europe to West Coast South America	Eurosal 2/SAWC
Northern Europe to Middle East	EPIC 2
Mediterranean to West Coast South America	CCWM/MEDANDES
Mediterranean-East Coast South America	MESA

Maersk Line operates 611 container vessels, 324 of which are chartered, and sells its container liner shipping services worldwide.

It markets its services through the Maersk Line, Safmarine, SeaLand (Intra-Americas), MCC Transport (Intra-Asia) and SeaGo Line (Intra-Europe) brands.

In addition, the Maersk Group also provides container terminal services, freight forwarding services, inland transportation, container manufacturing, and harbour towage services.

Merger control rules and procedures

The transaction was notified to the Commission on 20 February 2017.

The Commission has the duty to assess mergers and acquisitions involving companies with a turnover above certain thresholds (see Article 1 of the Merger Regulation) and to prevent concentrations that would significantly impede competition in the EEA or any substantial part of it.

The vast majority of notified mergers do not pose competition problems and are cleared after a routine review.

From the moment a transaction is notified, the Commission generally has a total of 25 working days to decide whether to grant approval (Phase I) or to start an in-depth investigation (Phase II).

(from: hellenicshippingnews.com, April 11th 2017)

RAIL TRANSPORT

CHINA-EUROPE RAIL FREIGHT CONTINUES TO SOAR

Rail freight trains rarely generate main stream media attention.

Yet the January 18 arrival at DB Cargo's London Eurohub terminal in Barking, east London, was slightly different.

The 34 TEU-train had travelled more than 12,000km to Britain from Yiwu in eastern China, and was the first-ever freight service to complete the journey.

Taking 18 days to pass through eight countries, the train received a VIP welcome, with Chinese lion dancers and TV crews from around the world gathering to mark its arrival.

Such strong interest is due to the potential of trans-Eurasian rail freight to British logistics and forwarding companies.

The journey took around half the time of a similar sea voyage, and cost approximately half of the equivalent air freight journey.

"This moment was important to show that we can run the train in less than 18 days to the UK," said Mr Carsten Pottharst, managing director of InterRail Group, Switzerland, the operator of the service, who added that his company is hopeful of adding more British services in the future.

"It depends also on how much freight we can get from the UK to China - if we can get more trains eastbound, then there could be more."

Pottharst's optimism reflects recent growth in the China-Europe rail freight market.

London is the 15th European city now served by direct trains from China, joining destinations in Germany, Poland, the Netherlands, Belgium, Italy and Spain on a transcontinental network of more than 40 routes.

Trains reach Europe using either the southern branch of the Trans-Siberian Railway from northern China, or like the London train, by transiting through western China and Kazakhstan, and joining the Trans-Siberian at Yekaterinburg.

The Barking train was loaded with a mixture of consumer goods and clothing from wholesale suppliers in the Yiwu area.

Europe-bound trains also carry high-tech IT products such as laptop computers and mobile phones produced for multinational companies in factories in western China.



Indeed, Hewlett Packard is regarded as the pioneer of the very first China-Europe freight train, sending laptops and LCD monitors from Chongqing to Duisburg in 2011.

The speed of the service makes it particularly attractive to these suppliers in order to meet strict sale windows.

This is especially advantageous for manufacturers located a long way from the Chinese coast, and carriers and forwarders such as DHL, Geodis, Haltrans, Essers and Wagonborg have responded to this demand, presenting opportunities for companies like InterRail, which conducted its first intermodal rail freight tests in 2012.

It began running regular block train services in 2014, growing by more than 250% since.

From its hub in Yiwu, and working in close cooperation with China Railway subsidiaries CRCT and CRIMT, InterRail now serves Duisburg and Madrid twice-weekly, and has instituted a return Madrid - Duisburg - Yiwu service.

It also recently conducted a test service to Riga in Latvia.

"The China-Europe and Europe-China services account for approximately a fifth of our total group revenue," says Mr Hans Reinhard, chairman of InterRail Group.

"We expect further growth of at least 150% up to 2020."

Other prominent operators include Far East Land Bridge (Felb), which is 75% held by Russian Railways (RZD).

Felb began operating in 2008 and now provides regular intermodal "Speed" services of 14-18 days using the Trans-Siberian to Malaszewicze, Warsaw, Hamburg, Duisburg and Milan from Suzhou, Changsha, Shenyang and Changchun, with return journeys to Shenyang and Suzhou.

It also offers less-than-container-load (LCL) services from Suzhou and Incheon, Korea, and import/export between Suzhou and Guangzhou to Moscow.

The company's logistics network stretches to Qingdao, Beijing, Tianjin, Dalian, Yingkou, Pusan, Tokyo and Kobe.

German Rail (DB) is also heavily involved in trans-continental rail freight.

It founded Trans Eurasia Logistics (TEL) with RZD in 2008, which acts as a neutral train operator, handling transport operations, and coordinating purchasing agreements and the railway companies that provide traction along the route.

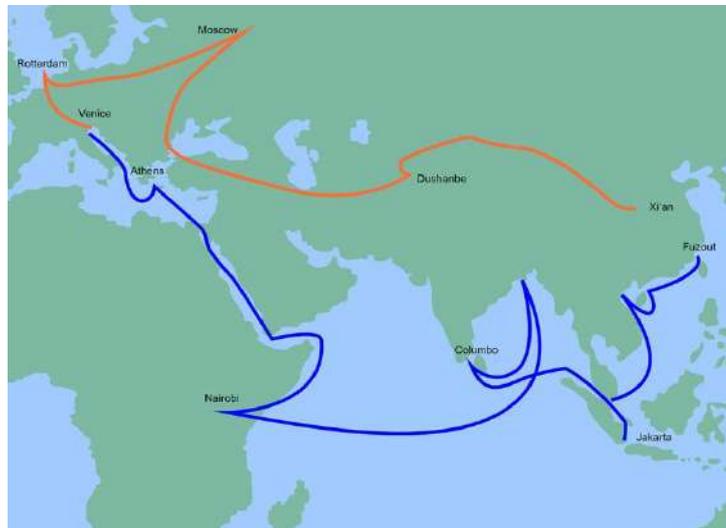
DB Schenker also serves clients and cities across China, delivering to destinations in Germany and Poland.

Higher volumes

This growing network and frequency of service is inevitably translating into higher volumes.

DB says that more than 40,000 TEUs were transported between China and Germany in 2016, a record, and that it is expecting this figure to grow to 100,000 by 2020, more than triple the amount carried in 2014.

RZD Logistics' 2016 results reveal a similar trend, with the RZD subsidiary reporting that Chinese-Europe transit trains carried 73,000 TEUs on the Russian network last year.



Yet the recent spike in traffic is not solely driven by organic market growth.

Political will from the east, specifically through China's One Belt, One Road (OBOR) strategy, which was announced in 2013 and formally adopted by president Mr Xi Jinping in 2015, is cited as the primary factor in the recent upsurge in volumes.

The strategy aims to restore the ancient "Silk Road" between China and Europe by encouraging investment in Eurasian transport and logistics networks,

including rail, to boost Chinese trade and investment, and economic integration.

More than 40 memorandums of understanding and cooperative agreements have been signed with countries along the route since 2013.

And according to Mr Wing Chu, a senior economist at Hong Kong Trade Development Council, OBOR is regarded as a long-term plan of cooperation.

"In the next few years we will see China pursue this very heavily both at the government level by working more closely with OBOR countries, but also particularly at a business and enterprise level by increasing trade and investment in OBOR countries," Chu says.

"The railway is an important driver in this macroeconomic development."

The degree to which China is committed to the strategy's rail ambitions became evident in June 2016.

Eight trans-Eurasian freight trains left eight Chinese cities simultaneously on June 8, heading to destinations across Europe.

All were carrying royal blue TEUs with the name of the new service, China Railway (CR) Express stencilled onto each 40 foot unit.

The same CR Express containers made the journey to Barking, and companies like InterRail and Felb now have the option to use these containers, their own, or to rent others from elsewhere for their trans-Eurasian rail services.

Like the branded containers of shipping companies that are now seen all over the world, the thousands of blue TEUs now in circulation are spreading brand China.

Rail's role in OBOR is underpinned by subsidies for transcontinental freight services now offered by regional Chinese governments.

Indeed, Reinhard and Felb marketing director Mr Leonardo Vender admit that that the New Silk Fund is the main reason why they have been able to grow their respective services by so much and in such a short period of time.

While Chu says the level of subsidies is unclear - some have speculated that they could be covering as much as half of cost - the overall aim is for rail to account for 25% of freight transported from western and inland China to Europe with a long-term goal of making these services profitable.

Currently rail accounts for less than 1% of all exports from China.

“By having rail as well as making use of air and sea transport, industries and cities in these regions can now choose how they want to transport their products,” Chu says.

However, to become a truly profitable service, there are a few hurdles that trans-Eurasian rail freight must overcome.

Enhancements

While transit times have certainly improved - some trains from Chengdu to Poland have reportedly completed the journey in 10.5 days - there is still room for enhancements to infrastructure and the logistics process.

Unprecedented investment in China’s rail infrastructure over the last decade means that its major cities are now all well-connected.

Rail links with logistics facilities are also improving, while Russia has invested billions of Roubles in recent years to improve capacity and increase line speeds on the Trans-Siberian.

Kazakhstan is also engaged in a \$US 2.7bn railway upgrade programme, encompassing 724km of track as well as locomotives and freight wagons, with its president, Mr Nursultan Nazarbayev a long-time backer of restoring the Silk Road.



This is perhaps best reflected in the construction of the Khorgos Gateway project.

Situated on the Kazakhstan-Chinese border, the future logistics and industrial hub is billed as the new Dubai, covering a colossal 5470ha.

This includes the 129.8ha Khorgos Gateway Inland Container Dock, a gauge-changing station for the trans-Eurasian railway, which has capacity for six trains at one-time, and can process 580,000 TEUs annually.

However, the quality of rail infrastructure in some of the other transit countries outside of the key corridors is not up to this standard, which is holding back progress.

While InterRail operates a 14-day service between Yiwun and Tehran, and Turkey is served via the Caspian and Black seas, these are token rather than core services.

China Railway's desire for a third trans-Eurasia connection from Kunming through Myanmar, Bangladesh, India, Pakistan, Iran, Turkey and Europe is also some way off.

As part of OBOR, China is pushing, and largely funding, a vast programme of Eurasian infrastructure investment.

The China Investment Bank estimates that 900 OBOR infrastructure projects worth \$US 890bn ranging from rail to road, port and pipeline, are planned or underway in 64 countries.

Chinese policy banks such as the China Development Bank and China Ex-Im Bank are expected to provide the lion's share of the funds.

However, China is introducing additional methods to address the inevitable investment gap: the \$US 40bn Silk Road Fund was established in January 2014 to support these projects; and the Chinese-driven Asian Infrastructure Investment Bank (AIIB), established in January 2016 with OBOR in mind, has 57 members and is offering a further pool of \$US 100bn.

In 2015, this translated into a \$US 15bn investment in OBOR initiatives by China, and a corresponding \$US 8.2bn investment by individual states.

These figures were projected to increase substantially in 2016 and 2017.

Critically, though, it is not just China's financial muscle which is backing these projects.

Increasingly China is turning to international pension funds, insurance companies, sovereign wealth funds and private equity finance to support its plans.

Mr Henry Tilman, chairman and CEO of Grisons Peak, a London-based investment bank, told The Financial Times in May 2016 that these institutions are increasingly attracted by long-term returns of 6-8% on some OBOR infrastructure.

State-owned institutions are also keen.

IE Singapore, the state-owned trade development board, is partnering with China Construction Bank to finance OBOR projects worth up to \$US 22bn.

In addition, Chu says that Hong Kong's financial institutions, the traditional source of Chinese finance, are also watching the OBOR initiative closely.

Many of these investments will be directed at improving logistics processes for rail.

Crossing borders, and switching between 1435mm and 1520mm gauge, and back again, remains a major challenge, and an obstacle to reduced transit times.

Vender says that capacity at many border stations in particular is a concern and requires improvement, especially as freight flows continue to increase.

Access to the European network is also a problem due to ongoing restrictions on speeds and slots.

Similarly, while customs processes at borders have improved significantly in recent years following the advent of the Eurasian Customs Union, which enables the use of a single tracking sheet for individual TEUs - reducing transfer times from anything up to three days previously to a maximum of six hours now - Reinhard feels there is still room for enhancement.

"There could be further improvements on electronic data transfer between railways and operators with the goal of minimising the exchange of paper documentation," he says.



"Secondly, it would make sense to consolidate the trains at CIS inbound borders to enable their full use when it is possible to run longer trains in the CIS.

The trains could then be split up into smaller train lengths

according to the European maximum length."

In addition, changes to customs procedures could add a new dimension to what are solely point-to-point services at present.

While shipping to lucrative western European markets has driven the early growth, Chu says that only when trains can capture freight from transit countries will the trans-Eurasian railway realise its true potential.

"If we want to see big growth in volumes, then there must be some arrangement to let the trains stop in other countries along the route to load and unload freight," Chu says.

"China is pushing hard to negotiate with other countries that the CR Express operates in to encourage cooperation to enable this to happen and to capture more business."

Europe - China

There is also a pressing need to boost the transport of goods on return trains from Europe to China.

Despite China being the European Union's (EU) second largest trading partner after the United States, and one of its largest single sources of exports, Europe's reliance on cheap Chinese imports meant that in 2016 there was a trade imbalance of \$US 174bn.

Nevertheless, China is now Europe's fastest growing export market and overall trading has increased dramatically in recent years.

Following a 37.7% spike between 2010 and 2011, when the value of exports increased to €113.45bn, and a further 20.2% increase between 2011 and 2012 to €136.42bn, growth has continued with exports worth €170.14bn in 2016, on par with the 2015 figure.

This trend is expected to continue, particularly following the passage of a comprehensive EU-China Investment Agreement in November 2013, which eases restrictions on market access and provides a more secure and simpler legal framework.

All of this offers significant potential for rail freight.

Currently European exports to China are concentrated on machinery and equipment, cars, aircraft and chemicals.

However, Chu says that strong demand in China, particularly in the west of the country, for high-end European goods such as fashion items and premium frozen food products, could stimulate interest in faster rail shipments.

He adds that the Chinese government is taking the unprecedented step of encouraging imports by rail.

Yet this is unlikely to completely satisfy the trade imbalance, and rail must have the flexibility to serve more destinations along the route.

Russia is the obvious destination for this.

However, since retaliatory economic sanctions to those imposed by the west in 2014 blocked the export of agricultural products to Russia, European carriers have been prevented from tapping into this potentially lucrative market.

Reinhard says InterRail's Russia - Europe transport has all but been wiped out and transit shipments of some products are now banned.

But with Reinhard citing the ample opportunities to encourage more European-based carriers and forwarders to use rail freight to China, it appears the Russian question can be avoided for the time being.

"Some European logistics customers are still to fully grasp how they might integrate rail freight services into their internal logistics systems," he says.

Reinhard adds that InterRail is already active in Central Asia, and he predicts that following expected increases in the price of oil, the economies of these countries will improve, boosting demand for its services.

Vender says Felb has not suffered any restrictions in business from Russia and that it is eyeing further opportunities for growth in Korea and Japan, and "virtually every location along the Trans-Siberian Railway."

He explains that it is the job of the company and forwarders to make the availability and benefits of these services visible to customers.

"Further expansion is imminent as we are exploring new options to serve the Nordic countries, France and possibly Spain," Vender says.

"We are not excluding Taiwan and the Philippines, which may one day benefit from our rail services."

However, with subsidies for westbound services set to end in 2020, both Vender and Reinhard are cautious about prospects beyond this date.

The hope is that trans-Eurasian rail freight offerings will be plentiful and mature enough to become self-sufficient by that point.

And with growing enthusiasm in transit countries as they benefit from improvements to infrastructure and related economic growth, there is every chance that this will become the case.

China then might be driving the New Silk Road, but it seems that everyone along the route is poised to jump on board.

"We think the era of the rail alternative between China and Europe has just begun," Vender says.

(from: railjournal.com, April 18th 2017)

ROAD TRANSPORT

UK ROAD HAULAGE GROUP'S CLASS ACTION AGAINST EUROPEAN TRUCK MAKERS CARTEL STRENGTHENED

The ongoing case of the European truck cartel which has seen many of the manufacturers collude and conspire with regard to vehicle prices and emissions has reached a new phase with the release this week of the European Commission (EC) settlement decision on the matter.

This has fanned the flames for those who propose a class action, of the type we have seen so often across the Atlantic, to reimburse those road haulage operators left out of pocket.

In the van (no pun intended) on this is the Road Haulage Association (RHA) which, having obtained the non-confidential version of the EC ruling, says it serves to strongly reinforce the RHA's determination to pursue the legal action against the manufacturers to reclaim the cost of overpayment for its members.

The organisation is appealing for transport firms, whether they are RHA members or not, to get in touch if they want compensation.

It also confirms there is no cost to haulage firms in joining the proposed legal action and anyone affected can register their interest here.

The companies charged with antitrust activity reads like a who's who of truck production with Volvo, DAF, Daimler, Fiat, Iveco, MAN and Renault just some of the names linked to the investigation.



As several of the manufacturers (MAN, Daimler, Iveco, Volvo/Renault, and DAF) settled with the EC in clear and unequivocal terms, confirming their liability for infringing EU competition rules in relation to the main facts, the decision is not as detailed as it might have been, running to just over thirty pages.

The EC document however does provide more than a glimpse of the extensive and broad-ranging nature of the cartel, giving key details of how the cartel was

organised and how the European truck manufacturers colluded anti-competitively on truck pricing and emissions technologies.

The link to the non-confidential, provisional version of the EC decision on the case (No. 39824) is viewable here:

http://ec.europa.eu/competition/elojade/isef/case_details.cfm?proc_code=1_3_9824.

The main points are:

- Between 1997 and 2004, anti-competitive meetings between senior managers of the firms at headquarter level took place several times a year at trade fairs and other events and there were regular exchanges by phone and email.

From 2002 onwards, there were regular meetings among business persons of the firms' German subsidiaries who would report back to their respective headquarters.

- The manufacturers harmonised their respective gross price lists across the European Economic Area (EEA) at the outset of the cartel.
- They colluded on gross (and sometimes net) price increases for medium and heavy trucks throughout the EEA.

This included exchanging detailed spreadsheets showing intended future prices split by truck standard model for each manufacturer.

- The manufacturers discussed reducing rebates when the Euro (€) was introduced.
- The manufacturers agreed on the timing of the introduction of new vehicle emission technologies, as well as how much to charge for the emissions technologies.

These points give an idea of just how deep rooted these illicit dealings reached into the road haulage sector and how damaging these can be, particularly for smaller operators and particularly at a time when the authorities are hell bent on imposing ever more stringent regulations regarding emissions and cab vision standards, all resulting in an inevitable boost in sales of new trucks for the manufacturers.

What is particularly galling to those who know the market is the longevity and cynicism of those involved.

For example, as Euro VI has become the standard, the collusion over medium and heavy duty trucks is known to have affected the pricing of emission technologies since before Euro III was introduced.

This activity is believed to have covered the entire area covered by the EEA and certainly the EC decision directly refers to a period lasting from 17 January 1997 until 18 January 2011.

The RHA has appointed well known transport law specialist solicitors Backhouse Jones to deal with the class action suit it intends to bring against the truck makers and the company has more details and updates viewable on the website.

(from: handyshippingguide.com, April 11th 2017)

INDUSTRY

TOWARDS A PORT TAX FOR AUTOMATED TERMINALS?

One of the biggest political issues of the coming decades is the future of work.

Technological advances are such that more than half of the existing jobs could be automated.

Automation might create new jobs, but these will very likely not offset the lost jobs.

This has far reaching consequences: uncorrected, automation will erode tax income, welfare state and lead to very unequal income distribution.



Curiously enough, these issues are mostly absent from current political debate.

Could ports move that debate forward?

Ports have been pioneers in automation.

Long before it became fashionable to speak about automated driving or autonomous trucks, various ports already had their driverless trucks: the automated guided vehicles.

These automation processes, like other productivity enhancing developments such as containerisation, brought employment losses that were dealt with more or less satisfactorily.

Most of these transitions were facilitated by sustained trade growth or generous early retirement packages.

Times might be different now.

Trade growth is stagnating and will probably never again reach the levels of the last decades.

At the same time, robotisation could make more than half of current jobs disappear.

Terminal automation in such circumstances might have very different outcomes than in the previous decades – and result in the redundancy of people that are likely not to find another job again.

The business case for automated terminals is facilitated by governments that pick up the bill for the social costs.

An important social cost is foregone tax revenues: robots do not pay taxes and do not consume, so they do not create economic growth.

There is a limit to the absorption capacity of the state: who pays public services if the robots have taken over all the work?

Who will buy the goods if humans have stopped to work?

Not surprisingly, the literature on automation frequently suggests to consider introduction of a universal basic income, to be financed by some sort of tax on robots.

A recent example of such a plea has come from Bill Gates.

Most ports are public bodies, so they should look at job impacts.

Local firms expect the port to be productive, local communities expect it to generate jobs.

So any terminal automation project could raise concerns by port authorities, as well as by port-cities and states.

Why would it be in their interest to perpetuate a system that favours automation by taxing labour, but not taxing robots?

The issue is delicate: we do not want to stifle innovation, yet there might be a real problem with acceleration of automation.

This discussion has started, but does not seem to gather much momentum yet.

The European Parliament discussed a tax on robots, but decided not to pursue it.

The French presidential candidate Benoit Hamon proposed a universal basic income and a tax robots, but his proposal has hardly received attention – and he is currently polling fifth.

Ports could be excellent places to start policy experiments on the taxation of automation.

This could help to advance on questions such as: what to tax, how to tax, how to link the tax to education and reconversion of workers, should it be a temporary tax and whom to tax: should there be others than the terminal operators that could contribute to the mitigation of social costs?

Ports were at the forefront of automation; they should now be the pioneers in exploring solutions to mitigate the social impacts of automation.

(from: shippingtoday.com, April 19th 2017)

LOGISTICS

BOX BOOM FOR KUEHNE + NAGEL

eCommerce helps drives container volumes for Keuhne + Nagel up 9% to 1M TEU in Q1.

Kuehne + Nagel has just reported its Q1 2017 results.

In the ocean freight the 9% increase in volume to over 1M TEU was an exceptional result, growing "more than twice as fast as the overall market" the company stated.

Kuehne + Nagel is the industry's largest global sea freight forwarder, and one of the early adopters of an online quotation and booking system for ocean freight.

Commenting on its sea freight division result the company said: "The Group gained significant market shares in almost all trade lanes, particularly in the transatlantic and transpacific relations.



Kuehne + Nagel's customer information system, KN Login, proved to be a decisive success factor for winning new business".

While the company increased "cost efficiency" in its ocean freight business, at the same time it noted that "Margins continued to remain under pressure and thus were under the previous year's level, however, stable compared to the fourth quarter 2016".

Kuehne + Nagel also reported a strong result in its overland business segment.

"In the first three months of 2017, clearly exceeding market growth, turnover increased by 5.0 per cent compared to the previous year.

Higher volumes in the groupage, full truckload and intermodal businesses and the increased demand for industry-specific solutions, particularly for the pharma and the expo & event sectors contributed to the positive development.

Continuous process automation supported the improvement of the operational performance resulting in a 75.0 per cent EBIT increase," the company reported.

Overall, net turnover for the company increased by 7.2% to CHF 4,299 M and gross profit was up 3.5% to CHF 1,648 M.

(from: worldcargonews.com, April 20th 2017)

LAW & REGULATION

PACKAGE LIMITATION FOR CONTAINERISED CARGOES: THE MAERSK TANGIER

The Maersk Tangier is the first English case to consider package limitation for containerised cargoes under the Hague-Visby Rules.

Robert Thomas QC and Benjamin Coffey appeared for the successful claimants.

The judgment of Andrew Baker J, handed down today, is significant in a number of respects:

- The Court held that the Hague-Visby Rules were compulsorily applicable, notwithstanding that the carrier had issued waybills rather than bills of lading.
- The Judge declined to follow *El Greco v. Mediterranean Shipping* [2004] 2 Lloyd's Rep 537, in which the Federal Court of Australia held that Article IV Rule 5(c) of the Hague-Visby Rules requires cargo to be enumerated in the bill of lading "as packed".
- The Court gave further guidance on what constitutes a "unit" in the Hague and Hague-Visby Rules, following the decision of Sir Jeremy Cooke in *The Aqasia* [2016] 2 Lloyd's Rep 510.

The judgment also contains useful guidance on how the package limits in both sets of Rules are to be calculated in practice.

The facts

The claim arose out of damage to a cargo of large unpackaged pieces of tuna stuffed in three refrigerated containers, during carriage by the Defendant container line.

The Judge was asked to determine a number of preliminary issues relating to package limitation.

Were the Hague-Visby Rules compulsorily applicable?

It was common ground that the contracts of carriage initially contemplated the issue of bills of lading, but that after delays during carriage the parties agreed

that waybills would be issued instead, to prevent further delays at the discharge port.

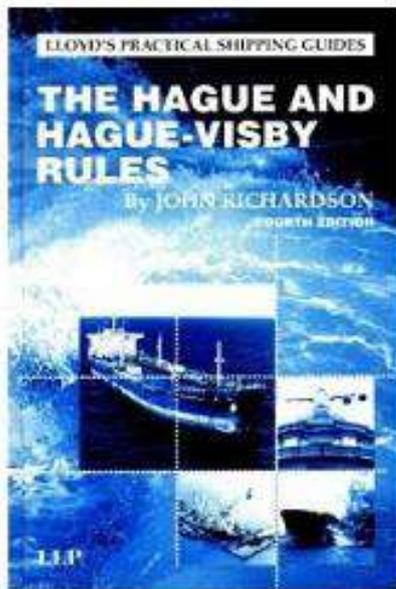
The Hague-Visby Rules only apply to contracts of carriage which are 'covered by a bill of lading' (Article I(b)).

A waybill is not a bill of lading for the purposes of the Hague-Visby Rules: *The Rafaela S* [2005] 2 AC 423.

The carrier therefore argued that because waybills had been issued, the Hague-Visby Rules did not apply.

The Claimant successfully argued that the Hague-Visby Rules nevertheless had the force of law in relation to the contracts of carriage, pursuant to the Carriage of Goods by Sea Act 1971.

The relevant question is not whether a bill of lading is actually issued, but



whether the issue of a bill is contemplated under the terms of the contract: this is established by a series of English and Commonwealth cases in which bills of lading were contemplated but never issued, usually where the cargo was damaged during loading and was therefore never actually shipped (e.g. *Pyrene v Scindia* [1954] 2 QB 402).

The Judge therefore accepted the Claimant's argument that the Hague-Visby Rules could apply not only where no bill of lading or other carriage document was issued, but also where a waybill was issued in place of a bill of lading.

In such a case, the contract was 'covered by a bill of lading' for the purposes of Article I(b).

What is a 'unit' for the purposes of the Hague Rules and the Hague-Visby Rules?

The carrier argued that the individual tuna pieces could not be said to constitute 'units', because they could not have been shipped breakbulk (e.g. in a reefer vessel) without further packaging.

Each piece was approximately 20 to 70 kg, and unpackaged.

In *The Aqasia* [2016] 2 Lloyd's Rep 510, Sir Jeremy Cooke recently held that 'unit' meant 'a physical unit for shipment' such that there were no 'units' in a bulk cargo.

But that did not address what was required for a physical item to constitute 'a physical unit for shipment'.

It was already clear that not all physical items will constitute 'units': in *Bekol B.V. v. Terracina Shipping Corporation ('The Jamie')* (unreported, 13 July 1988), Leggatt J had held that individual pieces of timber would have constituted 'units' had they not been bundled up together for shipment.

The bundling up of the pieces had the effect of constituting the bundles as 'packages', and preventing each piece constituting a unit.

Some consideration of the actual packaging of the cargo is therefore necessary to establish whether a particular item of cargo is a 'unit'.

The Judge rejected the carrier's argument that the relevant test should be whether the physical items could have been shipped breakbulk without any further packaging.

The only relevant question is whether the individual physical items have been packaged together.

If so, the individual items are not units, but instead form part of a single package.

If not, each physical item is a 'unit'.

Containers will not constitute a 'package', in light of the decision of the Court of Appeal in *The River Gurara* [1998] 1 Lloyd's Rep. 225.

On the facts of *The Maersk Tangier*, the individual pieces of 'tuna' were therefore 'units'.

El Greco and enumeration of cargo under Article IV.5(c)

Article IV.5(c) of the Hague-Visby Rules provides that "Where a container, pallet or similar article of transport is used to consolidate goods, the number of packages or units enumerated in the bill of lading as packed in such article of transport shall be deemed the number of packages or units for the purpose of this paragraph as far as these packages or units are concerned."

What is required for the number of packages or units to be sufficiently enumerated for the purposes of the rule?

Until now, the only available guidance on this point has been the decision of the Federal Court of Australia in *El Greco v. Mediterranean Shipping*.

In that case, the majority held that the rule required it to be clear from the face of the bill of lading not only how many items were contained within a container, but also whether those items had been packaged together.

For that reason, a bill of lading that simply referred to "1 container said to contain 200,945 pieces" was not a sufficient enumeration: it did not enumerate the number of pieces of cargo in the container "as packed".

Andrew Baker J declined to follow the reasoning of the majority.

The Judge held that Article IV.5(c) does not require enumeration of the cargo "as packed".

It merely requires that the number of packages or units inside the container is accurately stated in the bill of lading.

In this case, the waybills stated that the containers contained a certain number of pieces of tuna.

Each piece of tuna was in fact a 'unit'.

The waybills therefore accurately enumerated the number of units in the containers.

On the Judge's reasoning, the same result would have been reached in *El Greco*, but by a different route.

In *El Greco*, the individual posters had been bundled up together into packages.

The enumeration of the posters was therefore not an enumeration of the number of 'packages' or 'units' in the containers.

Calculation of the limit

The judgment also contains useful guidance on how the applicable limits should be calculated.

The Judge held that the package / unit limit applies to each individual package.

As such, if the limit is £100 per package and there are two packages in the container, of which one suffers £500 of damage and the other suffers £1 of damage, the claim overall will be limited to £101 (not £200).

(from: hellenicshippingnews.com, April 19th 2017)

PROGRESS & TECHNOLOGY

HOW VESSEL TRIM OPTIMISATION CREATES EFFICIENCIES

A ship's energy efficiency is determined by its design, its hull and machinery condition – and how the vessel is actually operated in terms of speed, draft and trim.

In the past, ships were optimized for one speed and one draft.

But during a ship's life time it sees a lot of different speeds and drafts.

One only has to think of the shipping industry's switch to slow steaming over the past years, in an effort to better control costs, as an example of our the "one speed, one draft" concept has gone by the way side.

Hapag-Lloyd has gone to great lengths to improve on this concept and has in turn put a lot of focus on vessel trim optimization which in turn helps reduce fuel oil consumption.

And if a ship's fuel consumption decreases, its emissions also drop.

The trim of a ship describes its floating position in length direction, namely if the bow or the aft of the ship is deeper submerged into the water.

The trim can have a significant impact on a vessel's energy demand for propulsion during sailing.

The most efficient trim for a particular ship depends on its design, operational draft and speed.



TRIM BY STERN



TRIM BY BOW

Hapag-Lloyds Trim optimisation software

During the course of 2016 Hapag-Lloyd used trim optimisation software on some 86 ships operated by Hapag-Lloyd (60 owned and 26 chartered).

The software calculates the hydrodynamic resistance for any floating position of the ship considering wave breaking resistance, frictional resistance and viscous pressure resistance.

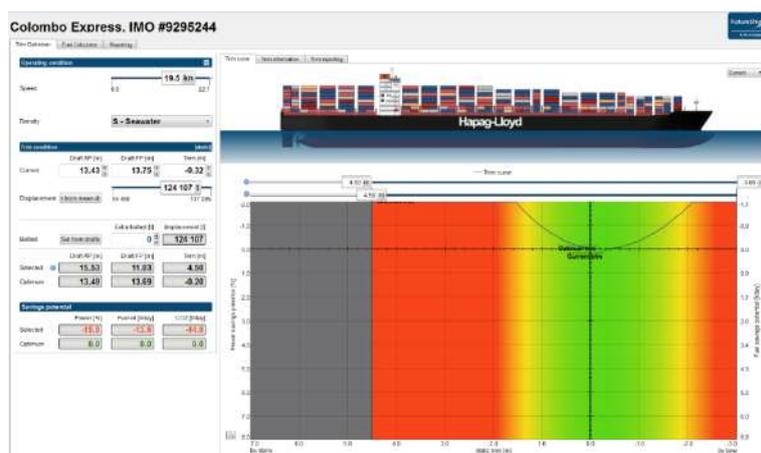
The calculation methods use Reynolds-Navier-Stokes equations (RANSE) representing the state of the art in fluid dynamic calculations.

For each of these ships, the hydrodynamic model is embedded into the Hapag-Lloyd stowage software used by our Marine Operations team.

This way a stowage planner can avoid heavy ballast water operations for the ship.

The ship has a similar view as the stowage planner as well as a detailed view on the trim efficiency.

In both views red and green areas indicate less and more efficient ship operation.



VIEW OF TRIM OPTIMISATION SOFTWARE

With this uniform view both ship and shore get the same set of information and a mutual understanding by means of efficiency can be gained.

In general, it can be seen that trimming is an integral part of efficient voyage execution in 2016, Hapag-Lloyd achieved savings due to trim optimisation of about 1.5% of main engine fuel oil consumption.

This saving was achieved despite the fact that the potential for trim optimisation was reduced, due to some vessels of the fleet being retrofitted with new bulbous bows.

The new bulbous bow improves the overall resistance of a ship and hence potential for trim savings is reduced.

In addition, a by-product of trim monitoring is to the ability to evaluate a ship's hull performance.

By using the hydrodynamic models from the trim optimisation evaluation and trending of the hull resistance and fouling is possible, followed by inspection and cleaning if required.

This gives Hapag-Lloyd vessels improved fuel efficiency and more positive take aways from trim optimization.

Outlook

With trim optimisation being a measureable factor we are able to gain insights into the cost efficiency of this technique and how we can achieve even higher savings.

An additional goal is to even better understand if cargo stowage related patterns and technical or nautical issues are obstacles to trim optimisation.

With this knowledge Hapag-Lloyd wants to further extend the coverage of our fleet with trim optimisation.

Our chartering department is already working with ship managers across the globe to install trim optimisation software on board their vessels.

With these improvements we foresee a future where our vessels are even more efficient and always enjoy smoothing sailing while at sea.

(from: hellenicshippingnews.com/hapag-lloyd.com, April 7th 2017)

STUDIES & RESEARCH

DISRUPTION IN SHIPPING: REGULATORS, WAKE UP!

What could disruptive innovation in container shipping look like?

Surely a timely question.

We have only started, but 2017 is already full of all kinds of disruptions; why would container shipping remain unaffected?

There are obviously different approaches to this question; mine (Olaf Merk's) is the interplay of business strategy and government policy.

The dominant business strategy in container shipping is economies of scale.

Or: big is beautiful.

The average capacity of a containership has quadrupled in two decades.

Over more or less the same period, container shipping has developed from a fragmented industry into an oligopoly.

We have seen over the past few years a wave of mergers in container shipping.

The result: in 2018, when these mergers have all materialised, the top 7 container lines will have a 77% market share.

Other indicator: we have – since 1st April 2017 – three container shipping alliances that cover 95% of the East-West traffic.

To put it slightly more technically: we have witnessed a process of horizontal integration in container shipping.

This process has been enabled by government policy.

Governments have approved mergers and been uncritical of alliances, with the notable exception of China on the proposed P3-alliance in 2014.

Governments has also provided state aid – in the form of favourable tax regimes, such as tonnage taxes – that have made it possible for shipping

companies to order bigger ships, and to survive the shipping crisis, which they created themselves by ordering too many ships, made possible by state aid.

We have reached the limits of economies of scale.

Ships can technically grow bigger than their current maximum size, but the cost savings from getting bigger become negligible, so this is becoming a strategic cul-de-sac.

The concentration in the industry also limits the obvious synergies from mergers: the number of smaller players to be eaten up is becoming limited.

Moreover, the development of alliances has reached its regulatory limit.

E.g. the EU consortia regulation stipulates a 30% threshold for alliances, which has now been reached with three large alliances covering 95% of the East-West container traffic.



With the strategy of horizontal integration coming to its logical end, container shipping will need to find another trick.

And this is where a business strategy will come at hand that has for the moment has

played second fiddle: vertical integration.

So, shipping taking over other parts of the maritime supply chain.

In itself, this is nothing new.

Many shipping lines have invested in container terminals.

A prominent example is APM Terminals, the terminal subsidiary of the Maersk Group, but many other shipping companies have stakes in terminals.

This is arguably going to become more important, in particular for the Chinese groups that have been very active in acquiring new terminals.

In addition, some shipping companies are engaged in organising land transport services: road, rail, river transport and coastal shipping.

Recently, various shipping companies have also explicitly stated their ambition to be active in logistics and freight forwarding.

For example, Maersk recently announced a strategy to become the “global integrator” in container shipping.

CMA CGM is also clearly interested in transforming from a shipping company into a firm that provides logistics solutions.

Vertical integration will become the new normal for container shipping companies.

This will be a source of disruption.

For a start, it might disrupt other sectors.

Freight forwarders might wonder if there is still a future for their services.

The same is true for other intermediaries in the maritime supply chain.

When a changing shipping business model meets the potential of digitalisation, the possibilities of disruption are endless.

Hence, the emergence of new partnerships, e.g. between Alibaba and Maersk.

The power of data is also a disruptive force that might strike the shipping sector itself.

Think of Uber: it has been successful thanks to its mastery of information flows.

Its lack of physical assets has been an advantage rather than a constraint.

In the same vein, could the heavy dependence of shipping companies on their assets – ships – make them less flexible in the battle for 21st century shipping?

In other words, would it be crazy to imagine high-tech start-ups with a stash of venture capital to crack the secret to a much more efficient maritime supply chain, leaving traditional shipping companies speechless?

Yes, crazy it would be – as any disruptive innovation – but not impossible.

The forthcoming disruption raises new policy challenges.

Is intense vertical integration of transport chains desirable?

Do we want supply chains to be locked-in by a select number of multi-national companies?

Can we avoid that public funds are used to enable private maritime supply chains?

For example, should the EU subsidise transport corridors that are needed to connect a port of entry selected by a foreign shipping firm?

Does it make sense to subsidise shipping companies that venture into business activities where they compete with companies that are not subsidised?

Is it beneficial for the public interest to continue facilitating horizontal integration in container shipping that will inevitably also lead to consolidation on the land side?

All these questions need honest answers.

So, shipping regulators might soon need to work over-time.

(from: shippingtoday.eu, April 13th 2017)

REEFER

REMOTE REEFER MONITORING FOR STEINWEG

Identec Solutions has installed the first remote reefer monitoring system in the Port of Hamburg at the C. Steinweg multipurpose terminal.

Today instead of manually checking reefer containers every four or eight hours the C. Steinweg (Süd-West Terminal) multi-purpose terminal can monitor reefers at its facility remotely.

The terminal has installed Identec Solution's CTAS Reefer monitoring system, which uses remote units that magnetically attached to the container and connect to the reefer's serial port to send data wirelessly.

"CTAS Reefer is compatible with all current models from reefer container manufacturers such as Daikin, Carrier, Starcool or Thermo King," said Stephan Piworus, Global Vice President, Sales Ports & Terminals for Identec Solutions in Hamburg.

"Once connected, the tag notifies relevant reefer data every 15 minutes by radio signal.

Should any discrepancies occur, these generate an automatic alarm signal facilitating an immediate response".



When the box leaves the terminal again, the tag is removed and used for the next container arriving.

The terminal has been using CTAS Reefer since late 2016 to monitor reefer conditions, including normal functioning, temperature, humidity and other parameters, and record, notify and processes all data fully automatically.

CTAS Reefer is linked with C. Steinweg's terminal operating system (TOS), and all event data is archived in case of enquiries or insurance cases.

"Use of the CTAS Reefer facilitates substantial reduction of labour-intensive, manual checking and documentation input," explains Piworus.

“Multiple data input is unnecessary, virtually eliminating any risk of errors in data recording.

C. Steinweg not only has an uninterrupted record of the state of a reefer for the duration of its stay at the terminal, but with the box being checked every 15 minutes, also boosts both safety and customer satisfaction.”

C. Steinweg gained three new customers last year and is handling more export reefer containers.

“We therefore gave special attention to how to organize an optimal service for reefer containers,” said Rainer Fabian, Managing Director of C. Steinweg (Süd-West Terminal).

“Automated high-frequency data collection enables us to guarantee maximum safety and security for sensitive reefer cargoes.

Instead of going unnoticed, defective reefer aggregates or discontinuation of power supply are quickly reported and can be rectified immediately.

Our trained, expert staff look after handling, connection and settings of reefer containers.”

The Port of Hamburg has announced the new system as a “fresh advance towards digitalization”.

C. Steinweg joins a list of terminals using CTAS reefer that includes Long Beach Container Terminal, USA; Port of Cartagena, Colombia; SSA Mexico; TecPlata, Argentina; APMT Apapa, Lagos, Nigeria; King Abdullah Port, Saudi Arabia; New Orleans, USA; and Karachi International Container Terminal, Pakistan, among others.

(from: worldcargonews.com, April 12th 2017)

ON THE CALENDAR

- 09/05/2017 – 12/05/2017 Monaco B. Transport Logistic
- 18/05/2017 – 19/05/2017 Georgia 6th Black Sea Ports & Shipping 2017
- 06/07/2017 – 07/07/2017 Yangon 15th ASEAN Ports and Shipping 2017
- 28/09/2017 – 29/09/2017 Tallinn Baltic Sea Ports & Shipping 2017
- 26/10/2017 – 27/10/2017 Barcelona 5th MED Ports 2017
- 29/11/2017 – 30/11/2017 Abidjan 18th Intermodal Africa 2017
- 24/01/2018 – 25/01/2018 Mauritius 12th Indian Ocean Ports and Logistics 2018
- 07/03/2018 – 09/03/2018 Padova Green Logistics Expo
- 28/03/2018 - 29/03/2018 Beira 19th Intermodal Africa 2018
- 18/04/2018 - 19/04/2018 Livorno 6th MED Ports 2018
- 30/05/2018 - 31/05/2018 Varna 7th Black Sea Ports and Shipping 2018
- 04/07/2018 – 05/07/2018 Johor 16th ASEAN Ports & Shipping 2018
- 26/09/2018 – 27/09/2018 Riga 2nd Baltic Sea Ports & Shipping 2018
- 24/10/2018 – 25/10/2018 Aqaba 15th Trans Middle East 2018
- 28/11/2017 – 29/11/2018 Accra 20th Intermodal Africa 2018
- 30/01/2019 – 31/01/2019 Kuwait City 16th Trans Middle East 2019
- 20/02/2019 – 21/02/2019 Manila 10th Philippine Ports and Shipping 2019
- 20/03/2019 – 21/03/2019 Mombasa 21st Intermodal Africa 2019

The Secretariat of C.I.S.Co. is able to communicate detailed information on the programs of all the events and how to participate.