

Newsletter

August 31st 2019

Link road, rail, sea!

Centro Internazionale Studi Containers

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The content of the C.I.S.Co. Newsletter is also published in the newspaper "Informare" accessible on the Internet site <http://www.informare.it>

C.I.S.C.O. NEWS

TRAINING COURSE "THE CONTAINER REEFER AND THE NEEDS OF THE GOODS"

Starting next September 10th and until the middle of the following November C.I.S.Co. will organize a training course dedicated to the reefer container and the needs of the goods.

The course provided by C.I.S.Co. is reserved for maritime agency employees and is financed by the bilateral category body.

28 hours of teaching are provided, divided into 14 lessons of two hours each.



The topics of the course will be the following:

- introductory notes
- technical aspects
- the goods
- logistics and containerized transport
- container logistics actors
- legislation and legal aspects
- container logistics documentation
- insurance aspects
- new technologies

The lessons will take place at the Assagenti Genova headquarters and by videoconference at the headquarters of the federated associations (Ancona, Bari, Cagliari, La Spezia, Leghorn, Naples, Ravenna, Rome, Savona, Trieste, Venice).

The detailed program of the course is shown below.

Programma Corso di Formazione

Data: 10/09/2019 17.30-19.30
CENNI INTRODUTTIVI
a cura di F. Rondini

Evoluzione del sistema dei trasporti e del commercio internazionale
 Il mercato reefer italiano import/export
 Le compagnie marittime: rotte - alleanze - strategie commerciali
 Composizione del costo del trasporto via mare
 I service contracts

Data: 12/09/2019 17.30-19.30
ASPETTI TECNICI
a cura di L. Folchitto

Introduzione container frigo e nave frigo
 Il container reefer: tipologie, struttura, riparazione
 Motori e refrigeranti
 Programmazione e il PTI

Data: 17/09/2019 17.30-19.30
LA MERCE
a cura di L. Folchitto

Focus su trasporto di merci refrigerate via mare: aree origine/destino
 Le tipologie di merce trasportate in reefer container
 La preparazione della merce: packaging e conservazione
 Temperatura - Tempo
 Frozen chilled

Data: 19/09/2019 17.30-19.30
ASPETTI TECNICI
a cura di F. Apeddu

Riferimento normativo per le CTU
 Calcolo delle forze nelle Cargo Transport Unit
 Tecniche pratiche per il bloccaggio e ancoraggio dei carichi nei container reefer
 Soluzioni ai problemi relativi ai materiali di bloccaggio
 Standardizzazione delle procedure e controllo della messa in sicurezza del carico
 Standard e certificazioni di corretto bloccaggio delle merci

Data: 24/09/2019 17.30-19.30
ASPETTI TECNICI
a cura di F. Rondini

I trattamenti: cold treatment - controlled atmosphere - modified atmosphere
 Le sonde e i genset

Data: 26/09/2019 17.30-19.30
LOGISTICA E TRASPORTO
a cura di L. Spallarossa - G.B. Guerrini

Lo scenario evolutivo della logistica reefer e l'evoluzione dei nodi logistici
 Locodes, Il codice BIC, la targa CSC, il programma ACEP

Programma Corso di Formazione

Data: 01/10/2019 17.30-19.30
ATTORI DELLA LOGISTICA DEL CONTAINER
 a cura di *L.Spallarossa*

Il caricatore: magazzini di carico - Trading Companies
 Importatori - Esportatori
 Supply Chain Integrata: approvvigionamento, produzione, distribuzione, vendita, post-vendita
 Attrezzature e sistemi di controllo della temperatura

Data: 03/10/2019 17.30-19.30
ATTORI DELLA LOGISTICA DEL CONTAINER
 a cura di *G.Rossi*

Aspetti doganali import ed export sui carichi refrigerati
 Agecontrol / Sistema fitosanitario / PIF / Sanità Marittima

Data: 08/10/2019 17.30-19.30
NORMATIVA E ASPETTI LEGALI
 a cura di *P. Solmi*

I protocolli cold treatment dall'Italia realizzati e in negoziazione

Data: 10/10/2019 17.30-19.30
NORMATIVA E ASPETTI LEGALI
 a cura di *A. Frondoni*

Polizza italiana merci trasportate
 Formulare inglesi Institute Frozen Clauses Interpretazioni delle polizze italiane
 PI clubs

Data: 15/10/2019 17.30-19.30
DOCUMENTAZIONE LOGISTICA DEL CONTAINER
 a cura di *G.Boi*

Bill of Lading e SeaWay Bill
 Cenni sui principali incoterms
 Normativa sul trasporto marittimo containerizzato

Data: 17/10/2019 17.30-19.30
ASPETTI ASSICURATIVI
 a cura di *G.Boi*

Assicurazione corpi e assicurazione responsabilità

Data: 22/10/2019 17.30-19.30
NORMATIVA E ASPETTI LEGALI
 a cura di *A. Frondoni*

Principi di responsabilità del vettore terrestre marittimo e multimodale
 rapportati al trasporto di containers frigoriferi – Analisi di casi"

Data: 24/10/2019 17.30-19.30
LE NUOVE TECNOLOGIE
 a cura di *A. Ghiraldi - A. Gregori*

La refrigerazione passiva:
 I dispositivi di tracciamento



C.I.S.Co.

PORTS AND TERMINALS

CONTAINER TERMINAL UTILISATION RATES TO RISE AND "BIG SEVEN" PREMIER LEAGUE OF OPERATORS EMERGES

The outlook for global container port demand is modest growth and numerous uncertainties, but in the face of this, capacity expansion plans are also muted.

This means that most world regions will see an increase in average terminal utilisation, according to the Global Container Terminal Operators Annual Review and Forecast 2019 by global shipping consultancy Drewry.

Drewry's container port demand forecast for the next five years is for global growth of 4.4% per annum on average, lifting world container port throughput from 784 million teu in 2018 to 973 million teu by 2023, an absolute increase of almost 190 million teu.

The latest five-year forecast is a far cry from the heady days of the 2000s when forecasts were around 9% growth per annum until the global financial crisis of 2007-08 brought this to a shuddering halt.

The detailed modelling results in varying forecast growth rates at the regional level (see figure below).

Several locations are expected to outperform markedly the global average, most notably Middle East/South Asia and Southeast Asia/Far East.

Global container port capacity is projected to increase at a CAGR of around 2%, based on confirmed additions only.

This is well below the projected demand growth and reflects the continued easing off from greenfield projects by investors over the last few years.

As a consequence, average utilisation at the global level is forecast to increase significantly from 70% in 2018 to 79% by 2023.

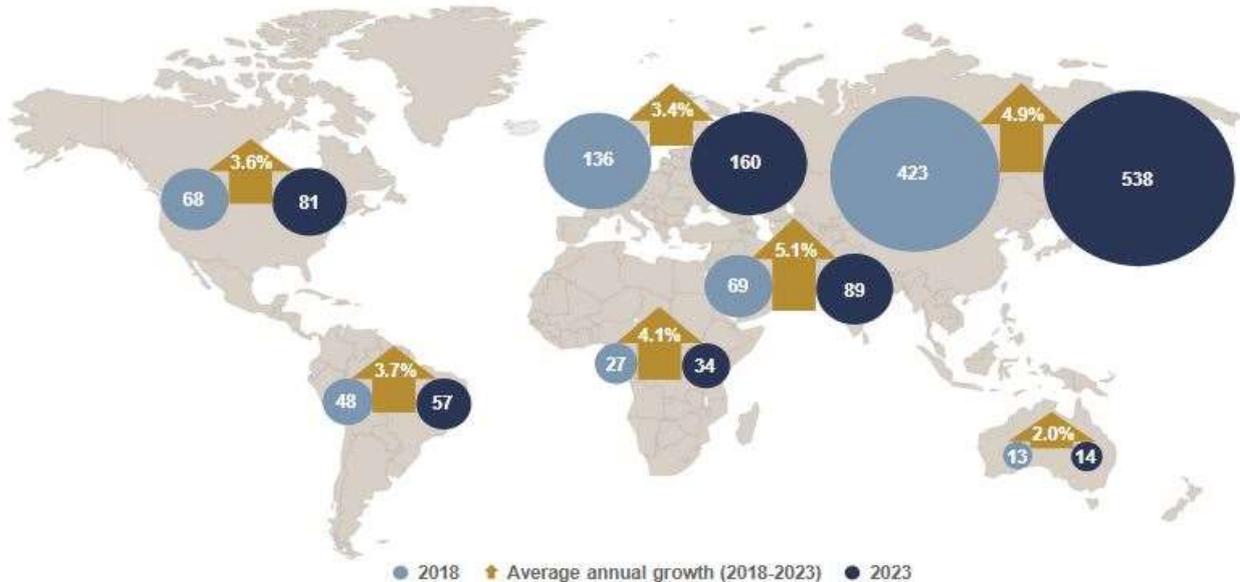
This though remains a comfortable level for both operators and customer alike.

At the regional level, almost all locations are projected to see their average utilisation levels increase.

The sharpest upward swings are expected in Greater China and Southeast Asia (with the former hitting 100% by 2023).

Referring to China, Neil Davidson, author of the report and Drewry's senior analyst for ports and terminals said "The previous very rapid pace of capacity expansion is on hold, with the focus instead being on consolidation of port and terminal ownership into large groups.

Projected regional container handling (mteu) and average annual growth (%), 2018-2023



Source: Drewry Maritime Research, *Global Container Terminal Operators Annual Review and Forecast 2019*

This, plus the uncertainty about China's international trade growth in the face of tariff wars and protectionism, suggests that the government is taking a cautious approach."

Drilling down to the performance of the individual global/international terminal operators, the top seven players are shown in the table below, with throughput adjusted for equity stakes.

PSA and Hutchison occupy first and second places respectively, with PSA's pre-eminence due to its 20% stake in Hutchison Ports.

Fortunes varied – PSA volume was up 7% and topped 60 million teu while Hutchison was largely unchanged at just under 47 million.

Cosco moved up to third place in 2018 (from fifth in 2017) by achieving over 30% growth, boosted by the OOCL acquisition.

This meant that DP World and APMT each dropped one place to fourth and fifth respectively.

The latter registered nearly 8% growth, helped by the closer relationship with Maersk Line resulting in more of the carrier traffic directed to APMT facilities.

China Merchants (35 million teu) and TIL (26.5 million teu) remained in sixth and seventh places respectively despite both recording double-digit growth in equity-adjusted volume.

“A premier league of seven big operators has emerged, after which the next largest player is a third of the size.

Between them they accounted for nearly 40% of global throughput in 2018.

Within this elite group, Cosco has moved sharply up the table in this year’s analysis,” added Davidson.

Top 7 global/international terminal operators, equity-adjusted throughput, 2018			
2018 ranking	Operator	2018 throughput (mTEU)	Growth/decline (%)
1	PSA international	60.3	7.2%
2	Hutchison Ports	46.7	-0.2%
3	China Cosco Shipping	46.1	32.3%
4	DP World	44.2	3.3%
5	APM Terminals	42.8	7.8%
6	China Merchants Ports	35.1	13.1%
7	Terminal Investment Limited (TIL)	26.5	10.1%

Source: Drewry Maritime Research, Global Container Terminal Operators Annual Review and Forecast 2019

(from: hellenicshippingnews.com, July 30th 2019)

CONTAINER PORTS: THE FASTEST, THE BUSIEST, AND THE BEST CONNECTED

Known as the “humble heroes” of globalization, containers are handled in hundreds of millions at container ports worldwide annually.

Efficient and well-connected container ports enabled by frequent and regular shipping services are key to minimizing trade costs, including transport costs, linking supply chains and supporting international trade.

Thus, port performance is a critical factor that can shape countries’ trade competitiveness.

Every hour of port time saved by ships translates into savings in port infrastructure expenditure for ports, ship capital costs for carriers, and inventory holding outlays for shippers.

Recognizing the importance of measuring container port performance, UNCTAD developed the Liner Shipping Connectivity Index (LSCI) in 2004 to determine countries’ positions within global liner shipping networks; the latest country-level LSCI statistics were published in July 2019.

Subsequently, on 7 August, UNCTAD launched two new datasets:

1. The port LSCI.

This indicator draws upon the same methodology applied to the country-level LSCI.

It is developed in collaboration with MDSTransmodal and covers more than 900 ports over the 2006-2019 period.

2. A new comprehensive table that features port calls by country, the typical turnaround time as well as the average size and age of ships.

The statistics are derived from automatic identification system (AIS) data in collaboration with MarineTraffic.

The first year of coverage is 2018, with updates scheduled every six months.

The two new datasets complement existing UNCTAD maritime statistics and indicators that measure and track progress towards the achievement of the Sustainable Development Goals and their targets.

Insights generated by the new data will help businesses and governments identify global trends in liner shipping connectivity and port efficiency as well as monitor the position of their ports within the global container ports landscape.

Container ports – connecting and competing

Ports in smaller countries tend to provide transshipment services to larger neighbouring countries.

Often, smaller economies benefit from cabotage restrictions in larger neighbouring countries, as these restrictions limit the options of connecting (feeder) services along the coasts, e.g. of Brazil, India, Japan or the United States.

Colombo (Sri Lanka) has a higher LSCI than any Indian port, Montevideo (Uruguay) has significantly improved its connectivity, while the LSCI of Santos (Brazil) has been stagnant.

In the Caribbean, Balboa (Panama), Caucedo (Dominican Republic) and Kingston (Jamaica) have long been leading hub ports.

The expanded Panama Canal has led to shifts in service patterns.

The LSCI of New York/ New Jersey and Savannah on the east coast of North America grew by more than 20% since 2016, while the leading ports on the west coast of North America have seen their LSCIs stagnate.

The all-water route from Shanghai to the east coast has gained competitiveness vis-à-vis the competing land bridge and the Suez Canal route.

Ports in Panama and Cartagena in Colombia saw their respective LSCI scores increase significantly.

There are still no major hub ports on the west coast of South America.

New investments attract additional services.

Investment growth (public and private, as well FDI) in ports generate new services and activities.

It's worth noting that Piraeus (Greece), operated by COSCO (China), has become the best-connected port in the Mediterranean in 2019.

Other ports with Chinese investments that have seen their LSCIs go up include Colon (Panama), Khalifa (UAE) and Lomé (Togo).

West African ports have attracted direct services from China, leading to larger vessels being deployed on these routes.

Africa

Both geography and port reforms matter.

The best-connected ports in Africa are those located at the north-eastern, north-western and southern edges of the continent, i.e. ports in Morocco, Egypt and South Africa.

In comparison, western African ports display relatively lower connectivity levels given their location outside the trajectory of major north-south and east-west shipping routes.

Mombasa (Kenya) and Dar es Salaam (Tanzania) connect Burundi, Rwanda and Uganda to overseas markets through dedicated corridors; however, they remain highly congested.

Asia

China's ports feature at the top of the list.

Shanghai is the best-connected port in the world today; it has overtaken Hong Kong, China SAR, which ranked first in 2006.

Ningbo doubled its LSCI since 2006.

Outside China, the highest LSCI scores were recorded in Singapore and Busan (Republic of Korea).

Connectivity in Kobe and Nagoya (Japan) declined over the last decade, reflecting slower economic growth in Japan and the fact that its ports are less competitive as transshipment centres.

Pacific

The plight of Small Island Developing States (SIDS): Pacific Island countries exhibit some of the lowest shipping connectivity levels worldwide.

Port Vila (Vanuatu) receives about one container ship every three days, and there are only four companies providing any regular shipping services to the country.

In Kiribati, only one operator is offering regular liner shipping services, with one ship arriving about every 10 days.

Many SIDS are confronted with a vicious cycle where low trade volumes discourage investments that would improve maritime transport connectivity.

At the same time, low connectivity also translates into more costly and less competitive trade.

What can be done to improve a port's connectivity?

The following seven policy measures are key to enhancing port connectivity:

1. Go digital.

Digital and physical connectivity go hand in hand.

Just as trade benefits from the latest technologies such as artificial intelligence, the Internet of Things and blockchain, port and shipping operations would also benefit from tapping the opportunities arising from digitalization.

2. Link domestic, regional and global networks.

Restrictions affecting regional or domestic cabotage markets limit the ability of shipping lines to consolidate cargo.

Allowing international lines to also carry domestic trade and feeding cargo can enhance both the competitiveness of the port and shippers' access to overseas markets.

3. Ensure competition.

Considered prior analysis is required before assigning port concessions to terminal operators who are associated with shipping lines through vertical integration.

On the one hand, such operators can attract port calls from associated lines and alliances.

On the other, however, such vertical integration could discourage other lines from calling at the port and could limit choices available to shippers.

4. Port modernization.

Port clients, i.e. the shipping lines and the traders, require fast, reliable and cost-efficient services to ships and cargo.

Ports need to continuously invest in their technological, institutional and human capacities.

Public and private cooperation is key in this regard.

5. Widen the hinterland.

Ports should aim at attracting cargo from neighbouring countries and domestic production centres.

There is a common interest between many seaports and traders in neighbouring countries, especially landlocked countries.

Investments in corridors, regional trucking markets, and cross-border trade and transit facilitation can help expand ports' hinterlands.

6. Promote sustainability.

Port stakeholders are varied and may include shipping lines and traders, as well as social partners and the port-city community.

Stakeholders are increasingly demanding that ports deliver on their social, economic and environmental sustainability obligations.

7. Monitor ports' connectivity.

Policy makers, port authorities and investors need to continuously monitor trends in the global shipping network, the geography of trade, fleet deployment, and port performance.

UNCTAD's Review of Maritime Transport and the complementary online statistical information and country profiles support this monitoring objective.

Port calls and port turnaround times

Containerships have the lowest turnaround times.

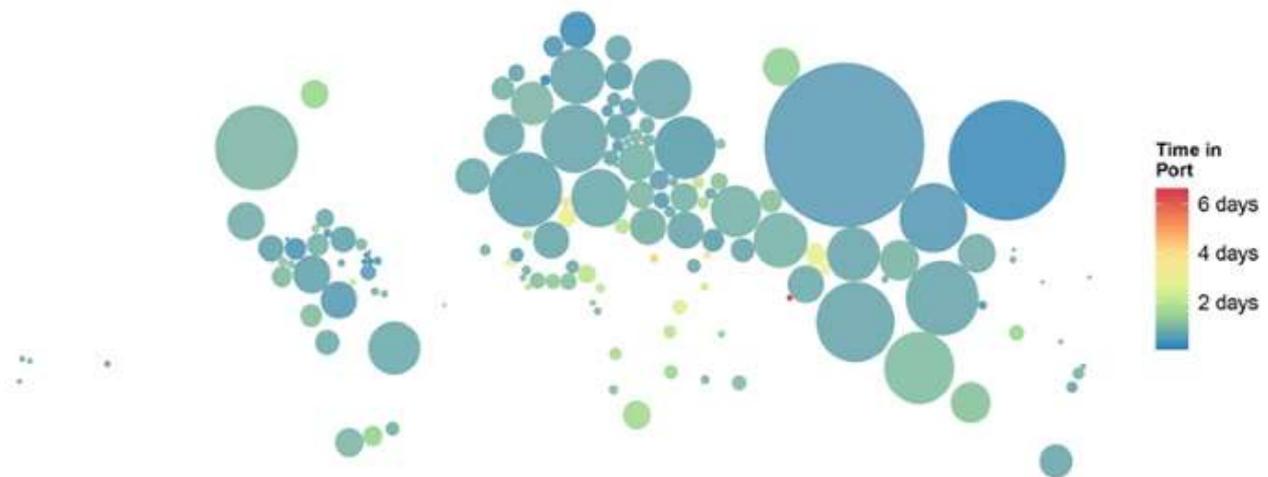
In 2018, a given ship spent a median of 23.5 hours in ports, i.e. 0.97 days.

Dry bulk carriers spent typically 2.05 days during a port call, while container ships spent on average the least amount of time (0.7 days).

Performances ranged between 0.23 days in the Faroe Islands and six and a half days in the Maldives.

Figure 1 illustrates the global distribution of port calls for container ships and the median time spent in ports.

Figure 1: Container ship port calls and time in port (days), 2018



Note: Ships of 1000 GT and above. Source: UNCTAD calculations, based on data provided by MarineTraffic (<https://www.marinetraffic.com/>). Illustration produced by Julian Hoffmann

A shorter time in the port is generally indicative of high port efficiency and trade competitiveness.

The bottom ten countries on the list are all developing countries or least developed countries, while the economies with the fastest turnaround times are mostly advanced economies with large volumes (Norway, Japan) or small economies, which handle low cargo volumes at each port call.

A longer time spent in the port does not necessarily mean that the port is less efficient, as ship owners may choose to have their ships stay longer in a port to purchase goods or services.

Countries with more port calls usually have lower turnaround times.

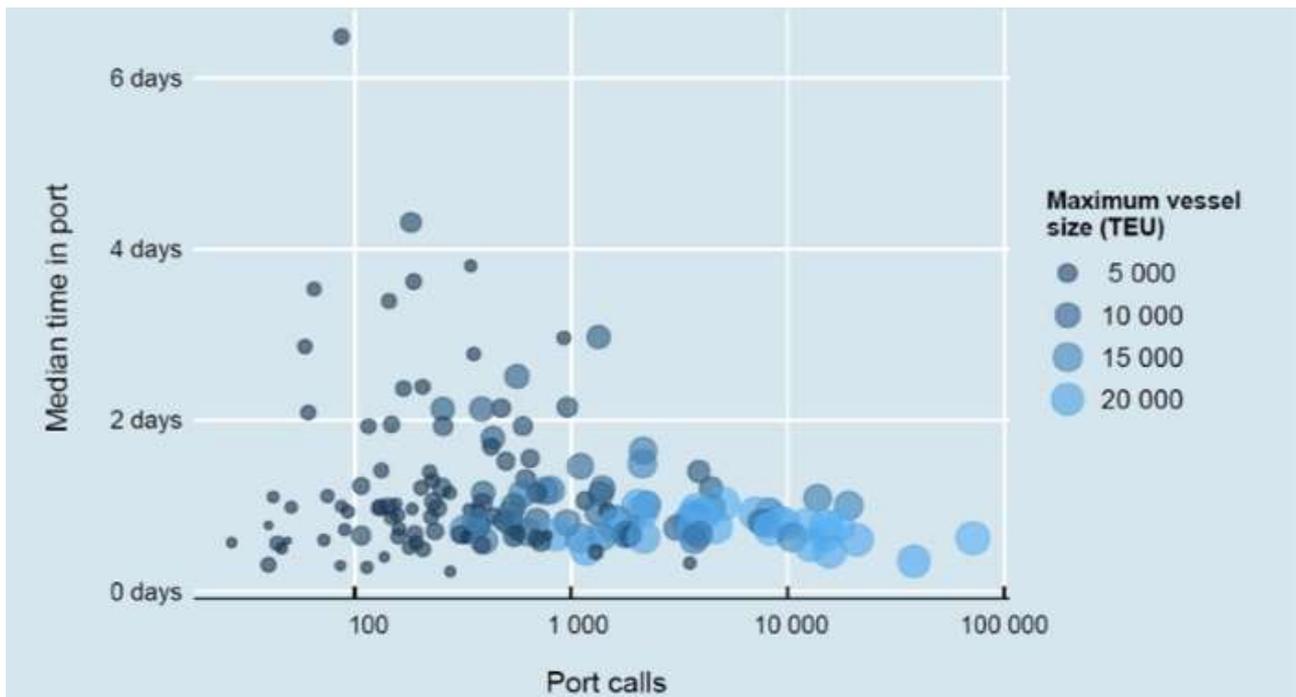
The causality goes both ways: if in a given port, turnaround is faster while maintaining the same number of berths, this means the port can accommodate a larger number of port calls.

At the same time, a faster turnaround time is more appealing to shippers and carriers.

Consequently, the number of port calls will be higher compared to a competing port that has a lower turnaround time.

Figure 2 illustrates the correlation between the number of port calls, the size of the largest container ships deployed, and the median time that container ships spend in ports.

Figure 2: Time in port (days) and number of port calls, 2018, container ships



Note: Ships of 1000 GT and above. Source: UNCTAD calculations, based on data provided by MarineTraffic (<https://www.marinetraffic.com/>). Illustration produced by Julian Hoffmann.

If ships are larger, *ceteris paribus*, turnaround time should be higher, as there will be more cargo to be loaded and unloaded.

At the same time, ports that can handle larger ships will usually also be more modern and efficient.

There is a negative correlation between the size of the largest ship calling at a port and the port time of ships, and a slightly positive correlation between the average size of ships calling at the port and the port time of ships.

Put differently, being able to accommodate very large container ships could indicate that ports are fast and efficient.

However, servicing larger ships that carry large volumes will, on average, also take slightly more time to load and unload.

In addition, being able to accommodate ever bigger ships can improve ports attractiveness as hubs.

However, it may also lead to fewer services and service provider choices to shippers, and create challenges that undermine the landside of operations, especially when larger vessels arrive off schedule.

This, in turn, could drive up total door-to-door logistics costs and compress trade volumes.

What can be done to improve ships turnaround time?

Three policy measures could help improve port performance:

1. Port call optimization: ships should only arrive at the right time, i.e., when they need to arrive, as arriving too early implies additional costs in ports, and sailing at unnecessarily high speeds would generate more air emissions including carbon dioxide (CO₂).

To arrive on time rather than in time is the aim of port call optimization initiatives.

Making use of digitalization means that data will need to be exchanged between shipping lines, ports, shippers and intermodal transport providers.

2. Facilitation: once a ship arrives at a pier, operations should start immediately, without having to wait for authorities to clear paperwork.

The FAL Convention of the International Maritime Convention can help as far as the vessel is concerned, while the implementation of the Trade Facilitation Agreement of the World Trade Organization can help speed up the process of cargo clearance, including measures such as customs automation, pre-arrival processing and border agency cooperation.

3. Port operations: fast and reliable loading and unloading operations require investment in infrastructure and superstructures, as well as technological and human capacities.

Privatizing port operations and assets can help, but needs to be planned carefully with public and private sectors' roles clearly delineated.

Total logistics costs need to be taken into account when considering such investments.

(from: hellenicshippingnews.com/unctad.org, August 8th 2019)

MARITIME TRANSPORT

US-CHINA TRADE WAR CONTINUES TO CAUSE CHAOS ON TRANSPACIFIC

Ongoing trade tensions between the US and China are continuing to cause chaos on Transpacific ocean shipping routes with peak season demand forecasts now softening, according to a leading forwarder and analyst.

Shippers moving cargo from China to the US have been in flux for over a year as the US-China tariff war has escalated.

Many had frontloaded shipments over the last two months ahead of US plans to impose a 25% tariff on \$300 billion worth of Chinese imports.

However, those tariffs were subsequently put on hold following a rapprochement in relations between the two countries after the G20 Summit in late June.

As reported in Lloyd's Loading List, some leading executives believe one outcome could be a repeat of an importing surge in the fourth quarter.

However, Andreas Krueger, head of Ocean Freight Americas, DHL Global Forwarding, told Lloyd's Loading List that any volume surge as a result of tariff-linked frontloading in the coming months would likely be less dramatic than during 2018.

"We can't provide a specific forecast, but we do not anticipate the rise in ocean freight import volumes from Asia Pacific to the US in Q3 and Q4 to be as pronounced as it was in 2018 - which was in part driven by companies pulling forward inventory ahead of the tariffs announced by the US administration," he said.

Cathy Morrow Roberson, founder and head analyst at Logistics Trends & Insights, told Lloyd's Loading List the US-China tariff war was complicating demand outlooks because implementation deadlines had consistently been delayed, but often for only for short periods.

Moreover, she noted that it was not just US trade with China that was being adversely affected by Washington policy swings.

"Within the next month or so after each such delay, tariffs have frequently been enacted and it's not just with China," she added.

“Trump delayed additional tariffs on Chinese imports that were set to begin this month - the second such delay.

An increase in tariffs on Chinese imports was also scheduled to go into effect January 1, 2019, but in December that was delayed but was then implemented in April.

In May, the US also lifted tariffs on metal imports from Mexico and Canada.

At the same time, Trump postponed a decision on whether to impose tariffs on automobiles imported from Europe, Japan, and other countries for six months.

That period would end in November and so possibly we could see tariffs on imported automobiles implemented at that time.

This tariff uncertainty created a tremendous amount of front-loading from China last year and this year as shippers raced to import goods ahead of tariff implementations.



The result has been very full warehouses here in the U.S despite good monthly retail sales.”

According to the US Census Bureau, US business inventories for April increased 0.5% after being unchanged in March, while retail inventories increased 0.5%, wholesale inventories jumped 0.8% and manufacturers' inventories rose 0.3%.

“At April’s sales pace, it would take 1.39 months for businesses to clear shelves, up from 1.38 months in March,” she said.

According to Krueger, many DHL customers have already moved sufficient stock levels into the US ahead of the peak season, and he noted that the DHL Global Trade Barometer forecast for the US predicts a slowdown in growth in ocean imports, although growth is still expected to be ‘modestly positive’.

US air and ocean exports, however, are expected to see a sharp decline.

“With Asia Pacific, and China specifically, being a key lane for both imports and exports to/from the US, the ongoing trade dispute is cited as an important factor in this trend,” said Krueger.

“Regardless of the volume growth, the pricing environment will depend in large part on how the carriers manage capacity.”

Roberson said supply chains were still mostly reactive given the uncertain tariff environment.

"I do not expect a strong peak season," she added.

"While a number of US ports continue to report strong monthly TEUs, if you look further into these numbers, there are a considerable amount of empty containers.

For the port of Charleston, for example, empty containers accounted for nearly 23% of all containers loaded on/off this fiscal year, which ended June 30.

Empties have helped the port set monthly cargo volume records eight times during their fiscal year.

The port of Los Angeles, a gateway for Asian imports into the U.S. has experienced similarly.

As a percentage of total loaded empties accounted for a high of over 50% in December 2018 but has since declined to 39% for May and 30% in June."

She said the trade uncertainty would be further complicated by the introduction of low sulphur fuels later this year which could add to supply chain disruption should frontloading restart.

"Could we see an air freight shift?," she asked.

"It's quite possible, particularly as IMO 2020 draws nearer, but it likely will be only a short-term gain for air and will not wipe away what is turning out to be a sad year for the air freight market.

"If there is any switch, it will be a costly one for shippers thanks to rising oil prices.

Shippers will be faced with either absorbing rising costs such as oil and tariffs or passing them on to their customers.

That could significantly reduce demand next year."

(from: lloydsloadinglist.com, July 26th 2019)

REINVENTING THE WHEEL

Judged by the numbers, container shipping and liquefied natural gas (LNG) is something like a love-hate relationship: the total number of LNG-fuelled ships on order, ready for conversion or already operating add up to 93 container vessels — that's more than any other ship type.

Focusing on the number of LNG-powered ships at sea, however, container shipping is far behind.

Enthusiastic about the opportunities

For Captain Richard von Berlepsch, Managing Director Fleet Management at Hapag-Lloyd, investments in LNG are not a question of love and hate, but about good entrepreneurship.

For him, LNG is one of several technologies that is set to make shipping greener and that ought to be tried out.

"With a company as big as ours you must be open to all kinds of technological ideas and innovations," von Berlepsch said in an interview with MARITIME IMPACT at the Hapag-Lloyd Ballindamm headquarters.

While the rapid technological change seen by the industry may cause concern for some people, being open and choosing the right moment to invest is what good companies are all about, the manager said.

"I'm more enthusiastic about the opportunities than about the risks."

Von Berlepsch has good reason to strike a positive tone.

Hapag-Lloyd is spending 30 million US dollars — around one fourth of its first quarter 2019 profit — to take one of its biggest vessels, the 15,000 TEU Sajir, to a Shanghai shipyard for more than three months from May 2020, forcing the carrier and its four Asian alliance partners to balance out a longer than usual downtime on the high-volume East-West trade lane through other services.

But it's for a good reason, as dockworkers at the Huarun Dadong shipyard will convert Sajir's existing conventional engine to a dual-fuel system that will allow the five-year-old vessel to burn LNG and — as a backup — low-sulphur fuel.

The planned works include the installation of a DNV GL approved gas storage system covering an area equivalent to 290 containers.

"What many people don't realise is that it's not simply a new filter that's being installed; technically, we're completely reinventing the wheel here," said von Berlepsch.

“It may be compared to the moment when steam boats replaced sailing ships.”

The conversion, which is to follow several months of preparatory steel work by yard workers in China, will enable the Sajir to cut its CO2 emissions by about 20 per cent, while reducing sulphur dioxide and particulate matter by more than 90 per cent once it returns to its route from Asia to northern Europe via the Suez Canal.

With the retrofit Hapag-Lloyd as well as its project partners including DNV GL and engine maker MAN are breaking new ground: never before has a container ship of that size been converted to LNG propulsion.

As the shipping industry is set to face increasingly stringent emissions rules in the years ahead, Hapag-Lloyd’s pilot may well be paving the way for similar retrofits in the future.

Looking at the bigger picture

While the price of LNG may be cheaper than low sulphur fuel oil when the global IMO 2020 emission cap takes effect, critics argue that retrofit costs surpass expenses for newbuildings and are simply too high to make it an attractive business case.

For von Berlepsch these arguments don’t count: “It wouldn’t be a pilot project if we didn’t look at the economics of it, but making money isn’t a priority in this case,” he said.

Hapag-Lloyd expects that it will take four to seven years to recover the cost of the Sajir retrofit.

The fact that LNG fuel tanks along with the necessary equipment need more space compared to conventional propulsion systems also can’t dissuade von Berlepsch from his plan.

“You must look at the bigger picture,” said the manager.

The pilot project of the Hamburg-based carrier doesn’t reflect the general state of the industry on LNG, according to Martin Wold, Senior Consultant for environmental technology at DNV GL.

“Hapag-Lloyd, including UASC and some others, have really done a great job in taking a more or less detailed look at the design of LNG equipment,” he said.

Dual-fuel engines, boilers and special grade steel to support heavy LNG tanks are among the initiatives taken by industry pioneers.

“But on the other side you have companies that have done very little in terms of LNG readiness and that only have a rough idea of where LNG tanks and equipment could be installed on a ship.”

2019 has seen a positive trend in orders for LNG-fuelled vessels across all ship types with a net order increase of 22 ships in the first quarter, most of them large ocean-going vessels, according to DNV GL’s Alternative Fuels Insight database.

The total number of LNG ships has passed the threshold of 300 with about half of them already in operation and the remaining ones on order.



About 40 per cent of all LNG-fuelled ships sailing the oceans today have been classed by DNV GL, making the society a global leader in that field.

Cooled down to minus 162 degrees Celsius, gas becomes liquid and shrinks to a fraction of its volume and can thus be bunkered while crossing the oceans.

The Sajir’s membrane tank will be capable of storing up to 6,700 cubic metres of gas, meaning the vessel will have to bunker twice per round trip.

“Once in Asia, once in Europe or twice somewhere in between,” said von Berlepsch.

Looking at Europe, the supply side is still a mixed bag.

While countries such as France, the UK, the Netherlands, Poland and Lithuania are already operating import terminal facilities, Germany, Europe’s biggest economy, is still in the planning phase with the government expecting at least two terminals to be built.

The first larger LNG tankers suitable for big merchant vessels like the Sajir are due to enter service in mid-2020, said von Berlepsch.

“With a tank as big as ours, you can’t just drive by with a tank truck to fill it up.”

While LNG trade is expanding, connecting hitherto disparate markets and weakening the historical price link to oil, gas still isn’t a global commodity, the manager said.

“US and Asian prices are completely different.

The arrival of large LNG tankers, however, may change that", said von Berlepsch.

"As soon as large tankers enter service, ship operators will be able to decide more freely where they want to refuel and prices will converge."

DNV GL confirmed Sajir as industry first in 2014

The Sajir was the first of a total of 17 "LNG-ready" ships that entered service from 2014 for United Arab Shipping (UASC).

DNV GL confirmed the "LNG-ready"-concept including void spaces and steel strength as an industry first back then, while also awarding the series with CLEAN class notations and Energy Efficiency Certificates.

Later, in 2017, the Sajir and its sisters became a key dowry that Arab shareholders provided for UASC's marriage with Hapag-Lloyd.

The merger created the world's fifth largest container shipping line and there's a chance that Hapag-Lloyd will convert the entire series of 17 ships if the Sajir LNG system proves successful and the supply situation guarantees smooth operations, said von Berlepsch.

Technical challenges faced by the LNG pioneer include keeping the gas in the insulated tank at the right temperature even when the vessel is anchored in a bay for a longer period.

As an idle ship needs less power, the gas pressure inside the tank will increase and may lead to excess boil-off gas, said von Berlepsch.

"LNG-fuelled ships need to be handled completely differently."

That's why crews at Hapag-Lloyd are undergoing intense training courses before going on board an LNG vessel.

In case of the Sajir, the vessel will be manned by an all-German crew and will fly the German flag.

LNG retrofit one way to cut emissions

With the IMO 2020 "sulphur cap" just around the corner, Hapag-Lloyd will also test and evaluate the use of scrubbers to clean exhaust gases on initially ten of its 235 ships.

Estimated costs range between seven and ten million US dollars per vessel.

"It is one thing to weigh up the advantages and disadvantages of a technology and another to install something and see the real numbers," said von Berlepsch.

The large majority of Hapag-Lloyd's vessels with an average age of eight years will, however, shift to low-sulphur fuel oil in the coming months — which represents a strategic decision, von Berlepsch pointed out.

"We are deeply convinced that the on-land production of the new fuel types is the most environmentally friendly and best way to comply with the IMO 2020 rules," he said.

Still, clients must be aware that the one billion US dollars in extra fuel costs seen by Hapag-Lloyd per year must be shared and that burden-sharing starts before 2020, said the manager.

"We cannot just flip the switch on 1 January."

Instead, Hapag-Lloyd vessels will start to shift to low sulphur fuels in the fourth quarter to be able to meet the IMO deadline.

Hapag-Lloyd has also implemented a new formula dubbed Marine Fuel Recovery (MFR), a mechanism that incorporates parameters such as vessel consumption, fuel type and price and containers on board.

"The MFR makes fuel price calculations very transparent and fair for all parties involved," said von Berlepsch.

Meanwhile, Captain Richard von Berlepsch is confident that the Sajir, named after a region in Saudi-Arabia known for its lush landscape and farming heritage, will live up to its name and be a "fruitful" experience for Hapag-Lloyd and the industry as a whole.

"And we're doing good for the planet," said von Berlepsch.

After all, that too is what good entrepreneurship is all about.

(from: hellenicshippingnews.com, August 6th 2019)

RAIL TRANSPORT

KOMBIVERKEHR LAUNCHES DIGITAL APPLICATION TO TRACE FREIGHT TRAINS

The Frankfurt-based logistics provider Kombiverkehr has launched the “Zug-Monitor” digital application.

It allows the customers to trace the geographical location of the freight trains.

The implementation of the new solution is a part of Kombiverkehr’s digitalisation strategy.

The “Zug-Monitor” application is integrated into the protected area of the company’s website.

To use it, a customer should register and activate an account in the myKOMBIVERKEHR area.

The application was launched at the beginning of July.

Currently, Kombiverkehr is testing its trial version that provides real-time information about the geographical position/last reporting point of the train and the current schedule deviations of the trains.

According to Kombiverkehr, a key feature of the application is the capability to provide the customers with very important information about so-called Estimated Time of Pick-Up (ETP).

“This closes one of the biggest information gaps in the intermodal supply chain, and thus reacts to the demands of our customers for more transparency in the intermodal transportation,” the company’s Managing Director Armin Riedl noted.

Across Europe

The trial version of the “Zug-Monitor” application displays the location of the freight trains going to/from seven terminals: five in Germany (Cologne-Eifeltor, Munich-Riem, Hamburg-Billwerder, Duisburg Ruhrort-Hafen DUSS, Ludwigshafen BASF) and two in northern Italy (Verona Quadrante Europa, Verona Interterminal).

However, the customers received information about the trains running not only within Germany and to Italy as well as transporting the freight between Germany and Sweden, Denmark, the Netherlands, Belgium, France, Spain, Switzerland, Italy, Austria, Slovenia, Czechia, Poland.

Nummer	Typ	Wiederholungsnummer	Ankunftszeit (Plan)	Abfahrtszeit (plan)	Status	Letzte Haltepunkt	abfahrt	Planabweichung
43133		Vierstedt Quadrivale Europe	Mo 08:03					
43118		Vierstedt Quadrivale Europe	Mo 08:33					
SPD	SPD	58109 Leipzig-Wahren Ubf	Di 10:39		Abgekommen	München-Riem Ubf	Di 07:07	+01:13
SPD	SPD	58106 Leipzig-Wahren Ubf	Mo 12:05		Abgekommen	München-Riem Ubf	Mo 09:01	-02:39
SPD	SPD	43132 Vierstedt Quadrivale Europe	Fr 02:30		Im Zulauf	München-Riem-West	Di 23:55	-01:49
		21804 Triebz. Bamern	Fr 06:30					
SPD	SPD	58093 Ludwigshafen (Rhein) SBB Ubf	Fr 07:30	Fr 09:30	Im Zulauf	München-Friedenheimer Brücke	Fr 08:43	+02:21
SPD	SPD	58175 Duisburg-Ruhrort Hbf (SBB) DB Fernverkehr	Fr 07:30	Fr 09:30	Im Zulauf	München-Friedenheimer Brücke	Fr 08:43	+02:21
SPD	SPD	58161 Köln-Eifelhof Ubf	Fr 07:30	Fr 08:50	Verzögert		Fr 08:58	+01:08
SPD	SPD	58179 Hamburg-Billwerder Ubf	Fr 02:45		Im Zulauf	Audbach	Fr 02:44	-01:13

The information is based on train traffic reports from the network operators and railway companies.

In the future, Kombiverkehr plans to synchronise the “Zug-Monitor” application with its internal CAT system using for transport processing.

It will allow the company to extend the geography of the new digital service and improve this process.

(from: railfreight.com, August 1st 2019)

ROAD TRANSPORT

OPTITRUCK SET TO COMPLETE REAL-LIFE FUEL OPTIMISATION TEST

OptiTruck, an EU-supported project which focuses on reducing greenhouse gas emissions of heavy duty vehicles by up to 20%, is poised to complete a real-life test of its innovative fuel optimisation module as part of a long-haul delivery mission spanning Turkey, Greece and Italy.

Earlier this month, two Ford F-Max Comfort Plus tractors with Otokar semi-trailers departed from Uşak, in Turkey, carrying a shipment for IKEA Transport & Logistics Services (Inter IKEA), who supported OptiTruck during the test phase.

After taking the ferry from Igoumenitsa, in Greece to Brindisi, in Italy, the drivers reached the IKEA logistics centre in Piacenza, near Milan last week.

For the return journey, optiTruck partnered with Electrolux.

This saw cargo loaded at the household appliances manufacturer's plant in Porcia, near Treviso, in Italy.

Both trucks are travelling back through Brindisi and Igoumenitsa, and were due to reach Istanbul today, 30 July, completing the 5,000 kilometres, 11-day round trip through three countries.

"Bringing together the most advanced technologies from powertrain control and ITS to improve fuel efficiency in heavy-duty road haulage, the optiTruck partners have created a global optimiser consisting of a set of dynamic, intelligent control and prediction components for effective powertrain management," optiTruck said in a statement.

Based on a predictive control system, the optiTruck global optimiser is expected to deliver a reduction in fuel consumption of up to 20% on a typical road transport mission for a 40t truck, while achieving Euro VI emission standards.

To develop the optimiser, optiTruck used Big Data analytics, cloud computing, predictive algorithms, electronic systems, embedded software, engine and after-treatment systems modelling, and vehicle modelling.

"The system develops a strategy for the best route and generates a velocity profile, using the information provided by new-generation navigation systems

and big data analytics in the cloud, including predictive traffic and weather information, road topography and road network, and information about the transport mission.

Inside the cabin, a smartphone-based interface provides the driver with optimal route and speed profiles, using on-board equipment and the connected Cloud Optimiser."

The statement added that the objective of the 'experiment' has been to test and fine-tune the fuel optimiser, the driver interface, and the algorithms underpinning the system.



Throughout the journey, sensors will record fuel consumption, urea consumption (AUS 32), CO2 and NOx emissions, as well as impact on driver workload and comfort.

"In addition to the ten Innovation Elements developed by optiTruck, our biggest challenge is to test the system with a real mission on this international route that will highlight the importance of our work," said the Project Coordinator for optiTruck, Jean-Charles Pandazis.

The international testing has been coordinated by the Codognotto Group, a global logistics operator which employs 1,000 staff and has 50 offices located in more than 20 countries.

"It is extremely relevant that the stakeholders of the logistics sector support the research with their know-how and expertise in order to speed up the technological development," explained CEO Maurizio Codognotto.

"Cooperating in such a project is always difficult for business operators but we have found a full cooperative approach by our customers IKEA Transport & Logistics Services (Inter IKEA) and Electrolux, players which are always looking to increase their standards of corporate and environmental responsibility".

For his part, Electrolux's Logistics Purchasing Director BA Europe, Marcelo Marcal, said of the optiTruck project: "We are very excited to add to our portfolio another sustainable solution in transport and continue our strong commitment of reducing emissions."

The results of optiTruck's full-scale test will undergo analysis by project partners and will be presented to the public in late August-early September 2019.

(from: lloydsloadinglist.com, July 30th 2019)

INTERMODAL TRANSPORT

MAERSK LAUNCHES ASIA-EUROPE OCEAN-RAIL SERVICE

Maersk has completed the first voyage of its new combined sea and rail service connecting shippers in Asia with ports in northern Europe via a transcontinental rail journey.

Containers from various Asian export ports are shipped to Vostochniy in Russia's far east, where they are transferred to rail for a nine-day journey to St Petersburg.

The final leg of the voyage involves containers going back on to the sea for the final shortsea connection between St Petersburg and European ports.

The first AE19 service carried Korean cargo loaded in Busan destined for the Polish market.

The service can also connect Japan and other Asian origins with several other ports in Europe close to St Petersburg, such as Bremerhaven in Germany or ports in Scandinavia and Baltic countries.

Maersk said the combined rail offering would give shippers significant transit time benefits compared with standard ocean transport and cost competitiveness compared with air freight.

The total transit time using the AE19 service from Busan to Gdańsk is 18 days, less than half the time of the conventional ocean only service on that corridor.

Maersk eastern Europe managing director Zsolt Katona said: "AE19 complements our product portfolio by offering a solution with a highly attractive transit time for customers with time-sensitive cargoes, all while remaining cost-competitive."

(from: lloydsloadinglist.com, August 9th 2019)



INLAND RIVER TRANSPORT

RHINE WATER LEVELS CONTINUE TO FALL AS DRY, HOT WEATHER INTENSIFIES

Falling water levels on the Rhine, a major freight corridor linking Germany, Switzerland, and France with Europe's premier container port of Rotterdam, are exacerbating already challenging conditions for intermodal barge transport companies and their customers with surcharges set to levied and existing ones increased.

A prolonged spell of dry weather has meant that cargo vessels are unable operate at full loading capacity on key sections of the river while a looming heatwave has raised fears of a repeat of last year's historic shutdown on the waterway.

In its latest service update, Rhenus Logistics-owned barge specialist, Contargo noted that water levels on the Rhine are currently falling at three key gauges for traffic - Kaub, for terminals south of Koblenz - including Frankfurt - Duisburg-Ruhrort and Emmerich.



The forecast is for levels to fall further in the coming days.

Contargo currently levies low water surcharge for the Kaub gauge of between €30 and €40 per 20-foot container and 40-foot container transported to and from Rotterdam or Antwerp.

However, a second-tier surcharge of between €45 and €60 is set to be activated on 28 July when the Kaub gauge is expected to fall below the 130-centimetre mark.

On 28 July, water levels at Ruhrort are forecasted to dip below 270 centimetres, triggering a surcharge of between €25 and €35 per container.

As for the Emmerich gauge, it continues to decline at a slow rate and is expected to fall to 113 centimetres on 28 July, still some way short of the surcharge threshold of 70 centimetres.

Bloomberg highlighted that when German authorities convened experts last month, they unveiled measures to help ease concerns, including better early-warning systems to help companies plan alternative transport options.

But officials acknowledged that they can't keep vessels afloat if water runs low.

"The Rhine is a natural river," commented Hans-Heinrich Witte, president of Germany's WSV rivers authority.

"There are limits to what we can do to keep it open as an industrial waterway."

Shippers are said to be stepping up emergency planning which entails using smaller vessels and different modes of transport such as trucks and trains capacity and also stockpiling goods in warehouses.

German Transport minister, Andreas Scheuer, described the low water periods on the Rhine as "painful", adding: "It's damaging to the German economy and has implications for our standard of living."

In addition to low water levels, barge operators are also having to deal with chronic delays for traffic at Antwerp and Rotterdam.

In an update published earlier this week, Contargo estimated that waiting times in Antwerp and Rotterdam are 26 hours and 21 hours respectively.

(from: lloydsloadinglist.com, July 25th 2019)

TRANSPORT & ENVIRONMENT

THE 340-MILE LINE OF SHIPS WAITING TO CLEAN UP

Head to the shipyards of Shanghai, Singapore or Hamburg and you'll soon find them full to the brim with vessels rushing to clean up their act.

Over the course of this year, about 2,200 ships will install so-called scrubbers that allow them to keep burning more-polluting fuel that will otherwise be banned.

Put all of those vessels in a line, and they'd stretch about 340 miles, according to figures from ship-classification company DNV GL.

Much of the work is being crammed into the fourth quarter, threatening to drain capacity from the global fleet.

The work is building up before new rules from the International Maritime Organization that will curb the amount of sulfur oxides vessels can emit from January 2020.



With ships able to keep using today's cheaper fuel by installing scrubbers, a chunk of the global fleet will do precisely that.

As such, many carriers will be out of service for weeks at a time from now through year-end for refits —

good news for shipowners as those who charter vessels find fewer available.

"This will knock out quite a lot of ships off the market and by reducing their supply, it will also boost shipping rates, especially in the fourth quarter," said Burak Cetinok, head of research at Arrow Shipbroking Group in London.

"We expect a lot of disruptions to vessel supply."

As is often the way, shipping rates have been surging or slumping this year depending on the cargoes being transported.

Carriers of dry-bulk cargoes like iron ore, coal and grains have had a banner year with earnings roaring as the market catches up after a couple of huge supply disruptions late in 2018 and early 2019.

Chinese economic stimulus helped too.

The Baltic Dry Index is at its highest for the time of year since 2010.

Go Scrubs

In oil-tanker markets, OPEC and its allies are trying to keep about 650 million barrels a year of crude off the market in an attempt to boost prices.

A large chunk of that missing supply would normally move by sea, so rates have stayed depressed.

The reduced fleets as ships fit scrubbers should help across the industry, although some of the carriers will have the equipment installed while they're being built.

Logistics Challenge

But for the companies fitting the scrubbers, the installations boom — while good for business — also presents a logistics headache.

Of the cumulative 3,000 vessels expected to have the equipment installed by the end of the year, two companies account for almost a third of those volumes: Wärtsilä Oyj and Alfa Laval AB.

Alfa Laval sold out its yard-space for pre-January 2020 installation a year ago, meaning it's a race against time to make sure the equipment is fitted punctually.

"The sharp implementation date has obviously posed a commercial and technical challenge for us," CEO Tom Erixon said.

"It's not necessarily to our advantage that the contracting cycle has been so quick."

While it's too early to see an impact on the freight market now, because most of the work is yet to be done, rates are nonetheless likely to rise when the installations ramp up and vessels go off-hire, according to Jonathan Chappell, an analyst focusing on marine transportation equities at Evercore ISI.

Any delays would also ripple into fuel markets.

If it takes longer than expected for vessels to return to service, it would diminish demand for high sulfur fuel oil at a time when most shipowners in the world's 90,000 vessel fleet are expected to abandon the product.

For the time being though, companies are confident that they can fulfill their orders on time.

"The ramp-up is quite huge," says Roger Holm, head of marine solutions at Wartsila, the largest supplier of scrubbers.

"Operationally we are really pushing the boundaries.

From a delivery point of view, it's quite heavy focusing on the second half of the year."

(from: gcaptain.com, August 2nd 2019)

LEASING

VESSELS FOR CHARTER 'AS RARE AS HENS' TEETH' – AND WITH DAILY RATES TO MATCH

'A perfect storm' of ships being taken out of service for scrubber installation and a dearth of new tonnage in all but the very biggest of container vessels has resulted in brokers reporting panamax and other smaller sectors as 'sold out'.

Charterers are now very much on the back foot and several ocean carriers at any one time can be chasing a suitable vessel that appears 'open' on their screens.

One London broker told The Loadstar today that finding panamax vessels was like "looking for hens' teeth".

"I have big liner clients banging the table and screaming at me to find tonnage," he said, "they have been used to being in the driving seat for so long, but now the tables have turned and they don't like it at all."

And for those fixtures that are being done, carriers are having to pay twice the daily hire rate of two years ago, and treble that of three years ago.

For example, Zim has just fixed the 2011-built 4,250 teu Constantinos P for 12 months, with options, at a daily hire of \$13,400 for deployment in Asia and is also understood to be paying to position the ship.

When the Israeli carrier last fixed the vessel, for a six-month time charter last year, it was paying \$7,900 a day, and for its charter by Cosco in 2017, the rate was just \$4,500.

Even the top two carriers, Maersk Line and MSC, accustomed to dictating the containership charter market, are not immune to the hike in daily hire rates.

Recent reported fixtures show MSC paying \$12,500 a day for the 3,820 teu wide-beamed Osaka for a six-month time charter in Asia, and 2M partner Maersk has taken on the post-panamax 4,975 teu wide-beamed RDO Fortune for 10 months, with a two-month option, at a staggering \$16,800 a day.

The previous charterer of RDO Fortune was HMM, which fixed the ship last November at \$12,750 a day.

Given its status, Maersk would have expected to fix the ship at that time at around \$10,000 a day.

For the bigger sectors, the liners are also having to dig deeper into pockets when they eventually find a suitable vessel to charter, and this will be knocking big holes in their vessel operating budgets.



For example, MSC has just fixed the 8,063 teu Seamax Bridgeport (ex-OOCL Long Beach) for \$30,000 a day for 10 months, with a two-month option, for deployment in Asia.

It was most recently on hire to Zim at just \$19,000 a day.

A broker source told The Loadstar the liners now wanted to commit for as long as possible if they find the right ship, in order to reduce the risk of paying more on an extension.

And Alphaliner reported this week: "Charterers are increasingly fixing tonnage on a forward basis, some with relatively far off dates in the future when they need specific tonnage."

The consultant noted that there were currently 31 container vessels, with a total capacity of 350,000 teu, out of service and undergoing scrubber retrofits in shipyards, an operation that can last 50-60 days.

(from: theloadstar.com, August 1^o 2019)

LOGISTICS

LOGISTICS INDUSTRY URGED TO TAKE 'NO DEAL' BREXIT RISK SERIOUSLY

The Freight Transport Association (FTA) is urging UK logistics businesses and international supply chain managers to recognise the change of Government policy and accelerate their preparations for a 'No Deal' Brexit.

The trade body's advice follows the appointment of Boris Johnson as Prime Minister, who has made clear his intention to leave the EU without a deal on 31 October 2019 if a new withdrawal agreement cannot be reached with Brussels.

"Logistics businesses need to take the prospect of a No Deal Brexit seriously," said James Hookham, FTA's Deputy CEO and head of Brexit readiness, "and speed up any preparations which can be made.

While there are still areas of uncertainty for those tasked with moving goods and services between the UK and Europe, most of the requirements that will kick in in the event of No Deal have now been published and are freely available.

In the run up to the 29 March Brexit, FTA lobbied the UK and the EU to obtain important temporary easements and contingency measures which will assist the industry to keep our trading links open.

However, many of these will expire, or are due to lapse shortly after the new 31 October Brexit deadline, and FTA is urging the new ministerial line ups to prioritise extending or re-establishing the necessary measures to ensure that trade can continue to flow freely to and from British industry."

FTA has written to Michael Gove MP, the new Chancellor of the Duchy of Lancaster and responsible for co-ordinating No Deal preparations, to urge rapid completion of the outstanding procedures and extension of the concessions.

FTA also urged high level co-ordination with the logistics sector to protect the economic health of the UK and the welfare of consumers.

"But," Mr Hookham continues, "while these discussions are ongoing with government, exporters, importers, freight forwarders and logistics operators in the UK and those working internationally should be taking steps to understand what they may have to do, how it should be done and who they need to deal with to keep their operations flowing.

“The UK’s supply chains are highly interconnected and complex and need to be protected if Britain is to keep trading efficiently with its biggest export markets in Europe.

We would still much rather the UK leaves the EU with an Agreement that assures the continuity of frictionless trade but if this is not possible, then as an industry we will need to be ready for the challenging and complicated task of navigating the requirements that will apply.”

Earlier this month, the UK's Department for Transport (DfT) officially unveiled its new no-deal freight capacity procurement with a 'Prior Information Notice' (PIN) published on the Official Journal of the European Union, alerting market suppliers from across the EU and beyond that it was about to commence the formal tender process with the publication of a contract notice.



It focuses on putting in place a “Framework Agreement with suitably qualified freight operators to provide Ro-Ro or Ro-Ro equivalent freight capacity, regardless of transport mode, to ensure the continued flow of Category 1 goods (including those which are critical to the preservation of human and animal welfare, and/or national security), as part of UK Government’s future resilience planning.

The Department of Health and Social Care’s (DHSC) has also issued a PIN to secure an “express freight service” that “will transport small medical supply consignments into the UK within 24 hours if the UK leaves the EU without a deal”

Earlier this month, in an interview with Lloyd's Loading List, Andrew Dean, director of Public Law at law practice Clifford Chance, said the DfT was playing a ‘straight bat’ this time around in the procurement of freight capacity in the event of a ‘no-deal’ Brexit having apparently learned some lessons from its preparations ahead of the previous EU exit deadline of 29 March.

The previous tender process last December for ferry freight space in preparation for the UK’s original 29 March departure from the EU generated a good deal of controversy - including the award of a contract to a ferry company with no ferries, Seaborne Freight, a lawsuit from Eurotunnel and subsequently from P&O Ferries, and the costly cancellation of the contracts with DFDS and Brittany Ferries.

“Gone is the secretive procurement process comprising only bidders of DfT’s own choosing.

Now, we have a fully transparent procurement process open to all potential suppliers across the EU and beyond,” Dean said.

“The focus remains on alleviating pressure on the short-Channel straight in the event of a no-deal Brexit.

But the scope has been broadened to cover all forms of roll-on/roll-off freight capacity; and not just ferries – for example, rail and air – which is likely to appease the likes of Eurotunnel and other providers of alternative forms of freight capacity,” he added.

(from: lloydsloadinglist.com, July 29th 2019)

DIGITIZATION KEY TO FORWARDERS 'REACHING THE NEXT LEVEL'

Forwarders with aspirations to be modern businesses must embrace the services and efficiencies available via digital platforms, according to Wolfgang Lehmacher, leading logistics consultant and the former head of Supply Chain and Transport Industries at the World Economic Forum in Geneva and New York.

“Performance and profitability in forwarding depends on capacity availability, capacity purchasing prices and utilization, operational efficiencies on route and in offices, product pricing, and resilience against supply chain disruptions,” he said.

“Platforms offer tools in all these areas - for example to match supply and demand, increase purchasing power, apply dynamic pricing, anticipate disruptions or provide other insights about the market with the help of artificial intelligence, big data and predictive analytics, just to name a few.”

The main potential danger when forwarders consider which platform to engage with, he insisted, was not engaging at all.

“Rejecting the platforms appears to me to be the biggest pitfall,” he said.

“Winning in forwarding is to a large extent about efficiencies - digitization is the key to reaching the next level.”

He also warned that companies attempting to develop their own platforms internally would face many challenges.

“Large forwarders can incubate such platforms, but it is hard to imagine that they can build them,” he said.

“A better way is probably to tap into the wealth of platforms and functionalities to support and uplift the existing business model.

Some forwarders might be able to build digital tools supporting their business.

Kuehne and Nagel and Agility have launched their portals, with Agility also operating their digital forwarder, Shipa Freight, that builds on the logistics capabilities of the company.

But the core competence of forwarders is to manage the flow of goods, which includes handling, transport and storage, as well as a broad range of value-added services, like packaging and quality controls.

Forwarders are not technology companies.

Building a platform might result in a broken system and just another marketplace in an already very crowded space.

Most forwarders face two options - either to turn their services into platforms or work with the platforms that exist on the market.

Forwarders can certainly mitigate risks by instead partnering with platforms.”

He also argued that facilitating digital transformation was often not only about technology but also about human capital management and governance.

For larger businesses seeking control over new digital platform solutions, maximising human capital was best achieved by either incubating internal start-ups or partnering with them.



Both strategies, said Lehmacher, were in line with the logic of Patrice Caine, chairman and CEO of Thales, who argued there would always be more “ground-breakers outside of your company than within.”

Some incumbents in the transportation industry, including Maersk, are already partnering with technology partners such as IBM and Oracle while others are seeking solutions via start-ups.

“Deutsche Post DHL is following both strategies,” he said.

“The logistics giant incubated the freight platform Saloodo and works with many start-ups in different fields - for example with Roambee, a data-driven internet of things company.”

He also said those attempting to adapt legacy systems to modern platforms and digital technology would face an uphill battle.

“Today’s technology struggles to integrate yesterday’s services,” he said.

“Traditional companies like Oracle, Descartes, Macropoint and DAT have built their supply chain solutions on legacy systems with previously available means and languages, such as electronic data interchange (EDI), emails or even phone calls.

But, today, application programming interface (API), cloud, AI and application (APP) based solution offer faster and regular exchanges, more service options, convenience and higher flexibility.

The winning forwarders will possibly be those that are able to integrate towards a whole product with the option of customization and legacy integration.

Forwarders might be well advised to seek collaboration with platforms and technology providers to upgrade their offers, rather than to be driven by fear of the disruption of their business.”

(from: lloydsloadinglist.com, August 2nd 2019)

LAW & REGULATION

WORLD MARITIME THEME FOR 2020: "SUSTAINABLE SHIPPING FOR A SUSTAINABLE PLANET"

"Sustainable shipping for a sustainable planet" has been selected as the World Maritime theme for 2020.

This will provide an opportunity to raise awareness of the United Nations' Sustainable Development Goals (SDGs), and showcase the work that the International Maritime Organization (IMO) and its Member States are undertaking to achieve the targets.

The IMO Council, meeting for its 122nd session at IMO Headquarters in London, endorsed the theme, following a proposal by IMO Secretary-General Kitack Lim.

"I believe that this theme will provide flexibility to the Secretariat and the Member States in highlighting the myriad topics and challenges in meeting the 2030 Sustainable Development Agenda.



At the same time, it will provide excellent opportunities to highlight the already significant contributions of shipping and the IMO to building that sustainable future," Mr. Lim said.

"The year 2020 will mark the beginning of a decade of action and delivery.

It will be a decisive decade not only for the shipping industry, but for life on the planet," Mr. Lim said.

He noted that September 2019 would see a gathering of Heads of State at the United Nations in New York, to take stock of how far the world has come in realizing the sustainable development commitments.

The SDG Summit, the Climate Action Summit and further high-level meetings planned for 2020, such as the Our Ocean and the UN Ocean Conferences, will provide opportunities for leaders from various sectors, including shipping, to both reflect on the work done and the urgent steps they further plan towards a sustainable future.

"The shipping industry, with the support of the IMO regulatory framework, has already started the transition towards this sustainable future.

We have adopted and continue to develop measures to cut greenhouse gas emissions, reduce the sulphur content of ships' fuel oil, implement the Ballast Water Management Convention, protect the polar regions, reduce marine litter, improve the efficiency of shipping through the electronic exchange of information, meet the challenges of the digitalization of shipping and enhance the participation of women in the maritime community," Mr. Lim said.

"We are strategically equipped, in line with the approach laid out in the IMO Secretariat's SDGs Strategy, to showcase our contribution to the SDGs and to act upon untapped opportunities of technologies, finance and new partnerships for the future benefit of the shipping industry and humankind," Mr. Lim said.

United Nations Sustainable Development Goals

In 2015, 193 countries adopted the 2030 Agenda for Sustainable Development and its 17 Sustainable Development Goals (SDGs).

This Agenda calls for action by all countries to eradicate poverty and achieve sustainable development by 2030 world-wide – and the SDGs are seen as an opportunity to transform the world for the better and leave no one behind.

As part of the United Nations family, IMO is actively working towards the 2030 Agenda for Sustainable Development and the associated SDGs.

Indeed, most of the elements of the 2030 Agenda will only be realized with a sustainable transport sector supporting world trade and facilitating global economy.

IMO's Technical Cooperation Committee has formally approved linkages between the Organization's technical assistance work and the SDGs.

While SDG 14 is central to IMO, aspects of the Organization's work can be linked to all individual SDGs.

(from: imo.org, July 23rd 2019)

IMO: THE CHANCE OF POSTPONING 1 JANUARY 2020 DEADLINE IS ZERO

The Bulletin met with Frederick Kenney, Director of Legal and External Affairs at the International Maritime Organization (IMO), to talk about why there is no chance that the 2020 sulphur limit deadline will be pushed, what will happen if ships experience operational problems because of the new fuels, and why regulation of open-loop scrubbers should be consistent rather than regional.

While the industry – from shipping and refinery to bunker and ports – is preparing, head-on, for 1 January 2020, many questions still cannot be answered, such as those surrounding the new types of low-sulphur fuel.

To other questions, there are crystal-clear answers; for example, whether the deadline of 1 January could get a last-minute push if the industry – or the refinery sector, for instance – finds that it is not ready.

“The chance is really zero.

Procedurally, there is no mechanism that would allow the 0.50% regulation, as it stands right now, to change from 1 January 2020,” says Kenney at the IMO’s headquarters in London.

He explains that, if a member state wished to postpone or change the requirement in the future, they could do, but the process would have to start all over again.

If all went as fast as it possibly could, that would take 22 months from start to finish.

But there is no procedural way to even start that right now.

Not until next year.

You would be talking about four to five years down the road if everything went perfectly smoothly,” Kenney adds.



No request for change from member states

The decision to set the 0.50% sulphur limit deadline at 1 January 2020 was made in October 2016, when the Marine Environment Protection Committee (MEPC) confirmed a decision taken when amendments to the IMO’s MARPOL convention Annex VI were adopted in 2008.

The treaty has since been amended, so the provisions to reverse that decision no longer exist.

A change of deadline would require amendments to the MARPOL convention by the MEPC and would need the support of member states – the same states that supported the 1 January 2020 deadline with an overwhelming majority.

“Any thought of trying to postpone the date would have to overcome that majority – and, from a practical and political stance, that would be a very, very challenging task,” Kenney says.

“In addition, we had the Marine Environment Protection Committee meeting in May, and no-one made that proposal; no-one put it on the table.

It cannot just be an ad hoc proposal, so it cannot be done, procedurally.

There is just no way to postpone the 1 January 2020 implementation date.”

The framework is in place, the rules are clear

According to Kenney, the IMO has produced a tremendous amount of guidance to assist shipowners in implementing the requirements, which should offer a good basis for preparation with seven months to go.

“The framework is in place and the rules are clear.

This is a tremendous opportunity for the industry – a chance to clearly demonstrate its commitment to the environment and to human health.

It is something of which everyone in the industry should be proud,” he says.

“If any shipowner is unaware of the regulations and what will be required, it is getting fairly late in the game.

The regulation for a 0.50% sulphur limit in fuel from 1 January 2020 was adopted in 2008 – so this has been a long time coming.”

Ship implementation planning guidance, to help shipowners prepare, has been issued by the IMO and covers such things as cleaning out tanks in preparation for low-sulphur fuel oil, which should be loaded well before 1 January 2020 – so, in the latter part of 2019.

Spring meetings to deal with potential 2020 issues

Should ships experience operational problems because of the new low-sulphur fuels under development – or with segregation of the fuel or other issues – these will be reported to the port state control or the flag states.

If evidence suggests that changes or adjustments are needed, either on an urgent basis or over time, the issues can be brought to the attention of the MEPC

meeting in April 2020, or the Maritime Safety Committee (MSC) meeting in May 2020.

“The committees will be meeting very early on in the implementation process, and will consider any information about implementation or safety issues and see whether further action is required,” says Kenney.

He adds that it is important for the industry to understand that the Fuel Oil Non-Availability Reports (FONAR) are not an implementation strategy people can use simply to avoid complying.

Ships can use FONAR if they cannot get compliant fuel, and to provide evidence that they have done what they could and taken the steps necessary to comply.

It is within the port states’ discretion to take the information in a FONAR into account when considering any sanctions for non-compliance.

“The ultimate goal of the IMO is to have global regulations that are implemented uniformly and enforced consistently.

That is our objective here,” Kenney says.

Scrubbers discussions on the table

Global regulations and consistency in implementing them are also core to the IMO when the topic is scrubbers.

Several states have banned or restricted the use of open-loop scrubbers – including Singapore, Belgium, Germany and Norway – and the list is expected to grow.

The IMO, however, believes global consistency ought to be the way forward.

“The IMO secretariat’s view is that global regulations – implemented consistently and enforced uniformly – are the best way to go.

When you see local and regional action being taken, it can be a cause for concern if it is inconsistent with IMO regulations. We need a level playing field, and that is what we are here to do,” Kenney says.

The MEPC is starting to discuss the impacts of the discharge from open-loop scrubbers, after a proposal by the EU to discuss and identify issues surrounding the equipment.

Open-loop scrubbers are not banned by the IMO, but there are guidelines for the installation and use of systems.

(from: hellenicshippingnews.com, August 13th 2019)

STUDIES & RESEARCH

REPORT HIGHLIGHTS CHINA'S GROWING ROLE IN BREAKBULK SHIPPING

The growing role of China in the breakbulk shipping trades has been unveiled in a new report by Dynamar.

Via state-owned companies China Cosco Shipping and China Communications Construction Company, the Chinese government now holds stakes in six heavy-lift/heavy load carriers, reported the analyst in 'Breakbulk V (2019) - Operators, Fleets, Markets'.

The report also reveals that low recent returns for multipurpose operators explain why the current orderbook runs to just 220 vessels, barely 5% of the existing fleet, and that Zeaborn - established in 2013 and now owners of Rickmers Linie - is the fastest growing breakbulk operator.



According to Dynamar, the current global multipurpose fleet – under pressure from container lines and the dry bulk fleet for cargo - currently consists of 4,700 ships which can broadly be split into two categories: those with ramps (Ro/Ro) and those without.

“The breakbulk heydays of the mid 2000s remain a distant memory,” said Dynamar.

“There was a peak in production between 2007 and 2012, when annually more than two hundred ships were delivered.

Such levels had not been seen since 1985.

Since 2015, production has fallen back again to below a hundred units per year and in 2018 only sixty-six units hit the waters.”

The report found that BBC Chartering, based in Leer, Germany is the undisputed number one by aggregate heavy-lift capability of its fleet, followed by Zeamarine of Hamburg, Amsterdam-based Spliethoff, Cosco Shipping Specialised Carriers and Chipolbrok.

"However, by average heavy-lift capability irrespective of deadweight, it is HMM with just four vessels, heading this ranking with an average of 640 tons," it said.

"Here, Chipolbrok comes second with 570 tons and Singapore's AAL third with 470 tons.

Numbers four and five are Zeamarine (395 tons) and BBC Chartering (380 tons)."

The deepsea Ro/Ro fleet also faces headwinds, according to Dynamar, not least because the presence of harbour cranes in many ports means the ramp's ability to compensate for the lack of shore cranes is increasingly obsolete.

"Instead, it has become a valuable add-on, a speciality to allow what is basically a multipurpose ship to carry cargoes that would not be suitable for handling by on-board or quay cranes," said the report.

"This will ultimately impact vessel design and Dynamar expects that the non-g geared PCTC - Pure Car and Truck Carrier - will eventually take over from the 'classic' conventional Ro/Ro ship."

(from: lloydsloadinglist.com, July 29th 2019)

GLOBAL CONTRACT LOGISTICS GROWTH NEARS DECADE-LONG HIGH

New research from Transport Intelligence (Ti) reveals that the global contract logistics market grew 4.9% in real terms in 2018, one of the fastest growth rates seen in recent years.

Ti noted that the 2018 growth figure “paints a picture of a healthy market, with 2018’s expansion well above annual growth rates seen over much of the last decade”.

It said growth was expected “to remain at such levels over the forecast horizon too, suggesting ongoing strength in core manufacturing and retail markets at a global level”.

Ti forecasts a slight slowdown in 2019, while looking ahead to 2023, Ti’s 5-year CAGR forecast for the global contract logistics market suggests an expansion rate of 4.7%.

But the latest round of contract logistics market sizing “reveals a mixed picture in major economies, however”, Ti noted.



“In China, one of 95 markets for which contract logistics market sizing is available, the contract logistics market shows remarkable vigour, with a 2018 growth rate of more than double the global rate, powered by an expanding consumer market and the growth of advanced manufacturing fields such as robotics, IoT and 3D printing.”

In the US, the story in 2018 was “reasonably positive”; but while the US contract logistics market grew, “the rate of expansion was more modest and well below the global rate.

The 5-year CAGR to 2023 for the US is muted at 2.0%,” Ti noted.

Nick Bailey, Ti’s head of research, commented: “2018 was a strong year for contract logistics providers in many respects.

While the fundamentals remain positive, players in the market need to take advantage and react to some significant changes in the market.

Across key verticals like retail, pharmaceuticals, automotive and beyond, demands are changing and shippers are expecting higher levels of service, digital offers and greater end-to-end value.

The pressure is on contract logistics providers to make sure their offer stays relevant.”

Analysis in the 2019 edition of Ti’s Global Contract Logistics report also places DHL Supply Chain well ahead of its nearest competitors XPO and Kuehne + Nagel as the largest contract logistics provider globally, with a 6.2% market share.

Andy Ralls, quantitative analyst at Ti, said: “The global market for contract logistics grew at a strong pace in 2018, down only slightly on what was an excellent year in 2017.

There are some stark contrasts between the significant bright spots in China, India and southeast Asia, when compared with developed markets in Europe, but even these are showing a reasonable level of expansion.

This means that 3PLs across the world have had significant opportunities to grow their businesses.”

(from: lloydsloadinglist.com, August 8th 2019)

SAFETY & SECURITY

TT CLUB BACKS MOVES BY BOX LINES TO PENALISE 'MIS-DECLARERS'

Freight insurance specialist TT Club has backed recent moves by container lines to penalise shippers found mis-declaring hazardous cargo, describing such a practice of mis-declaration as "strongly suspected as being either the cause of, or at least contributory to, the spate of container ship fires in recent months".

Several carriers including Maersk, Hapag-Lloyd, HMM and OOCL have introduced fines of several thousands of dollars for shippers who misdeclare hazardous cargo.

TT Club said it backed the moves to discourage shippers from mis-declaring cargo, adding: "TT Club welcomes such initiatives by liner operators, as the international transport insurer has growing concerns about the lax cargo packing practices and erroneous, sometimes fraudulent, declaration of cargoes."

Under the banners 'Cargo Integrity' and #Fit4Freight, TT Club said it "has been collaborating with stakeholders through the freight supply chain to highlight on-going risks, including severe ship fires, arising from poorly packed and declared cargo.

In light of the increase in incidents, the loss of life, significant costs and delays to cargo deliveries, the lines are strengthening their inspection procedures and imposing fines on those shippers found to have mis-declared."



Peregrine Storrs-Fox, TT Club's risk management director, commented: "Clearly, the shipper has primary responsibility to declare fully and honestly so that carriers are able to take appropriate actions to achieve safe transport.

Since this is not always the case, carriers have to put in place increasingly sophisticated and costly control mechanisms to 'know their customers', screen booking information and physically inspect shipments.

Equally, carriers have the opportunity to review any barriers to accurate shipment declaration, including minimising any unnecessary restrictions and surcharges.

Penalising shippers where deficiencies are found should be applauded.

Furthermore, government enforcement agencies are encouraged to take appropriate action under national or international regulations to deter poor practices further."

TT Club said its 'Cargo Integrity' campaign seeks not only to promote awareness of good practice, such as set out in the CTU Code, "but also to reveal the plethora of influences from both direct and indirect stakeholders within the supply chain that result in behaviours leading to dangerous incidents on land or at sea".

Storrs-Fox continued: "A key element of the campaign is to identify levers – both sticks and carrots – that are available to improve a safety culture in container transport, including considering unintended consequences inherent in trading arrangements or fiscal/security interventions and the possibilities presented by technological innovation."

Hapag-Lloyd has reportedly instituted a penalty of \$15,000 per box for misdeclared cargoes from China, effective from 15 September.

The German carrier saw a fire on board its ship Yantian Express earlier this year, which took weeks to extinguish.

According to Lloyd's List, South Korea's HMM has also brought in penalties at the same rate, while Hong Kong's COSCO-owned OOCL is introducing fines of unspecified amounts.

As reported in Lloyd's Loading List in January, the world's largest container line Maersk has begun checking whether import and export cargo in four US ports – Newark Berth 88, Houston Bayport, Miami Pomtoc and New Orleans Ceres terminals – to verify that contents match descriptions given and that cargo is correctly stuffed, latched and secured.

Maersk said it hoped the data collected will help develop procedures ensuring the accuracy of cargo descriptions and improved use of the Code of Practice for Packing of Cargo Transport Units.

"By performing these container inspections, we hope to remove some of the risk from mis-declared or incorrectly stuffed containers for all parties involved in handling and transporting cargo, as well as work towards an overall industry improvement of safety and reliability in the containerized maritime supply chain," the company said.

In a case where corrective action is needed to properly secure a cargo or change a declaration, the cost will be charged to the shipper or consignee, depending on the direction of the container.

Containers that have already been transported by sea and containers that have already undergone inspection at the loading port will still be eligible for the random inspections, Maersk said.

(from: lloydsloadinglist.com, August 8th 2019)

ON THE CALENDAR

- 10-10/09/19 Londra 12th Annual Shipping & Marine Services Forum
- 11-13/09/19 Amburgo Seatrade Europe Cruise & River Cruise Convention
- 11-13/09/19 Amburgo MARINE INTERIORS Cruise & Ferry Global Expo
- 19-24/09/19 Genova 59° Salone Nautico
- 23-25/09/19 Doha Ports & Maritime Evolution, Rail & Logistics Evolution,
Road & Logistics Evolution Qatar Assembly & Expo
- 23-24/09/19 Roma AIIT 2nd International Congress on transport
infrastructure and systems in a changing world
- 03-05/10/19 Piacenza GIS 2019 - Giornate italiane del sollevamento dei
trasporti eccezionali
- 06-09/10/19 Limassol 16th "Maritime Cyprus 2019" Conference
- 15-18/10/19 Oslo 15th GreenPort Congress and Cruise 2019
- 15-15/10/19 New York 11th Annual New York Maritime Forum
- 21-21/10/19 Atlantis The Maritime Standard Awards 2019
- 22-22/10/19 Atlantis The Maritime Standard Tanker Conference 2019
- 23-23/10/19 Parma Logisticamente On Food
- 06-06/11/19 Abu Dhabi The Maritime Standard Ship Finance and Trade
Conference 2019
- 27-28/11/19 Madrid International Cruise Summit 2019
- 03-05/12/19 Pordenone Navaltech 2019 - Marine Technologies Expo
- 04-05/12/19 Barcellona Cruise Ship Interiors Expo

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

