Centro Internazionale Studi Containers

Newsletter

September 15th 2019

Link road, rail, sea!

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LAW & REGULATION

STUDIES & RESEARCH

REEFER

September 15th 2019

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"

A training event organized by C.I.S.Co. is taking place from September 10th last to the end of the following October, 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.

Centro Internazionale Studi Containers

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

The topics of the course are 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 are taking 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

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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
Agecontol / 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
Formulari 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

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PORTS AND TERMINALS

ANTWERP 'READY FOR BREXIT'

Belgian port Antwerp has declared itself "ready for Brexit" and is predicting a radical shift in UK-European Union shortsea shipping from ferry to container transport, along with a massive rise in customs declarations.

Management at Europe's second largest port by volume believes that goods entering or leaving the EU by ferry ports will "face more checks and red tape" once the UK leaves the EU.

In a new 'white paper' published by Antwerp, the port warns that Brexit means more inspections of people, goods and documents, resulting in "higher costs, congestion and longer transit times for ferry transport".

Port of Antwerp anticipates that accompanied trucks will increasingly be replaced by shortsea container transport, with unaccompanied goods loaded on board by crane.

Management said that it is "gearing up" for further expansion of shortsea links with the UK, offering "at least part of the solution for the consequences of Brexit".

Port of Antwerp chief executive Jacques Vandermeiren, welcoming a port visit by Martin Shearman, the new British ambassador to Belgium, said: "Good friends and trading partners continue to talk to each other even in difficult and uncertain times."

With nearly 17m tonnes of freight, the UK was the second-largest trading partner for Antwerp in 2018.

The main freight categories are chemicals, oil products and fast-moving consumer goods such as foodstuffs, toiletries and cosmetics.

The port added: "Existing and new shortsea services between Antwerp and the British Isles will undoubtedly gain in importance in the run-up to Brexit and after October 3, building on the present links with nine UK and Irish ports."

Shortly after the British Brexit referendum in 2016, Port of Antwerp said its taskforce of 'Brexperts' has worked closely together with different stakeholders, including Belgian Customs, the Belgian Food Safety Agency and major port community and business representatives, to mitigate any negative consequences for the port.

Justin Atkin, the Port of Antwerp representative in the UK and Ireland, said: "Brexit creates not only challenges but also opportunities for trade between the UK and Ireland on the one hand and the European continent on the other.

Having more shortsea solutions in the logistics chain will not only mean greater reliability, it will also diminish our dependence on trucks for 'last mile' transport, as well as reducing costs and CO2 emissions."

Kristian Vanderwaeren, director general of Belgian Customs & Excise, outlined that the country's customs authorities are also getting ready, noting: "We have already hired an additional 386 full-time employees in order to deal with Brexit.

With 930,000 more import declarations and 4.5m more export declarations, the challenge facing us is enormous."

The Antwerp white paper is aimed at "jolting companies" into taking a hard look at their logistics chain.

It contains practical information on ways of using shortsea to reduce future uncertainties or delays or avoid them altogether.

GetLink, the Eurotunnel operator, also declared last week that it was ready for Brexit, outlining its infrastructure investments to handle the 5,000 trucks that pass daily through the Folkestone-Coquelles fixed link.

(from: lloydsloadinglist.com, September 4th 2019)

MARITIME TRANSPORT

CONTAINER INSPECTIONS REVEAL MISDECLARED CARGO, POOR STOWAGE

Inspections of ocean shipping containers conducted by the U.S.-based National Cargo Bureau discovered a shocking number of containers with misdeclared and improperly packaged cargo.

In the wake of incidents such as the 2018 fire onboard the Maersk Honam, which resulted in the deaths of five crew members, NCB — which normally inspects export containers leaving the U.S. — offered to do free inspections of a sample of containers, including imports, for members of the Cargo Incident Notification System (CINS).

CINS describes itself as "a shipping line initiative, launched in September 2011, developed to increase safety in the supply chain, reduce the number of cargo incidents on board ships and highlight the risks caused by certain cargoes and/or packing failures."

CINS says its 17 members control more than 60% of containerized cargo capacity.

Maersk and its Hamburg Süd subsidiary, Hapag-Lloyd and CMA CGM agreed to participate in the program, and between the four companies, 500 containers were inspected by NCB.

Ian Lennard, the president of NCB, said a mixture of containers carrying dangerous goods and general cargo, both imports and exports from the U.S., were examined.

Each of the four companies had a different method for targeting which containers they wanted inspected.

NCB is a nonprofit surveying organization that does inspections of both bulk and container ships.

It inspects about 31,000 dangerous goods containers leaving U.S. ports annually for container carriers to make sure cargo being loaded on their ships is safe.

But NCB does not normally inspect containers arriving at U.S. ports.

Lennard admitted to being shocked by what the inspections revealed.

Of the 500 containers inspected, 55% failed with one or more deficiencies; 49% of the import containers containing dangerous goods failed; and 38% of containers with dangerous goods exports failed.

Of the import containers with dangerous goods, 44% had problems with the way cargo was secured, 39% had improper placarding and 8% had misdeclared cargo.

Of the export containers with dangerous goods, 25% had securing issues, 15% were improperly placarded and 5% were misdeclared.

(To be fair, Lennard said some of the misdeclarations did not present safety issues.)

The failures NCB found among non-dangerous containers involved improperly secured cargo.

While there might be some dangerous goods being transported as general cargo, Lennard said finding those containers is "like finding a needle in a haystack."

He noted that the inspections that were done by NCB were "tailgate inspections."

The containers were opened and looked at, but not all the cargo was removed from the container.

The program uncovered a much bigger problem than NCB finds in the normal course of its business.

Last year only 7.4% of the approximately 31,000 export containers containing dangerous goods that NCB inspected resulted in failed inspections.

Many of the targeted import containers with problems originated in the Far East; others were from South America.

Lennard said the sample illustrates the magnitude of the problem, as well as the value of cargo inspections.

He noted that when a U.S. exporter fails an inspection, fixing the problem may be costly.

Documentation may have to be redone and a container might have to be retrieved from a terminal and repackaged.

The shipper "might get it wrong once, twice.

But eventually they will do it right because there are delays and certainly costs," Lennard said.

The inspections will be discussed next week at the U.N.'s International Maritime Organization's Subcommittee on Carriage of Cargo and Containers when they are presented in a paper by the International Cargo Handling Coordination Association (ICHCA).

A document submitted to the IMO by ICHCA, the World Shipping Council and several other organizations on July 5 in preparation for next week's meeting noted that "the increasing number of casualties related to container fires during the past years suggests that the problem is exacerbating," despite provisions in the International Maritime Dangerous Goods Code and other carrier initiatives to identify undeclared and misdeclared dangerous cargo being tendered for carriage.

"In 2019, up to the time of writing this document, there is an alarmingly increasing number of container ship fires, which, compared to previous years, may indicate an increasing severity of the problem," it said.

The London-based shipping consultants Drewry last month published in its Container Insight Weekly a list of eight notable fires between Jan. 3 and Aug. 9 this year on container and container/roll-on, roll-off ships.

Date	Ship name	Capacity (teu)	Operator (parent company)	Location of incident
09-Aug	*APL Le Havre*	10,106	APL (CMA CGM)	Off Indian west coast
25-May	*KMTC Hong Kong*	1,585	KMTC	Laem Chabang port
16-May	*Grande Europa* [1]	716	Grimaldi Lines	Off Mallorca coast
10-Mar	*Grande America* [1]	1,321	Grimaldi Lines	Off France Atlantic coast
13-Feb	*E.R. Kobe*	5,754	Gold Star Line (Zim)	Off China coast
31-Jan	*APL Vancouver*	9,200	APL (CMA CGM)	Off the Vietnamese coast
29-Jan	*Olga Maersk*	3,267	Hamburg Sud (Maersk Line)	On route from Panama to Cartagena
03-Jan	*Yantian Express*	7,179	Hapag-Lloyd	800 nm off Canada's east coast

Notable fires aboard containerships and con-ro vessels in 2019
(Source: Drewry Container Insight Weekly)

Andrew Kinsey, a senior marine risk consultant at the insurer Allianz Global Corporate & Specialty, applauded the work of the NCB, saying, "Finally we have some concrete data on a situation we all know was there but couldn't quantify."

He noted that since the Maersk Honam, fires aboard ships have occurred with alarming regularity.

A number of carriers have announced stiff fines for undeclared or misdeclared hazardous cargo.

"Hapag-Lloyd, which last year shipped nearly half a million dangerous goods, will from September 15, fine shippers $15,000 for undeclared or misdeclared hazardous cargoes," said Drewry.

"HMM will fine the same amount, while Evergreen announced a penalty of $35,000.

OOCL said that it is tightening its dangerous cargo acceptance with an additional verification step."

The International Federation of Freight Forwarders Associations (FIATA) has expressed concern about the steep fines, calling for "urgent dialogue with the top carriers."

Kinsey said the NCB study is an answer to anyone who believes those fines are an overreaction.

"It's a situation that's now being documented.

Let's do 5,000 inspections, let's do more."

According to a note from last July by the IMO Secretariat, in 2017 there were 79,780 container inspections reported to IMO, and 6,684 — or 8.38% — of those containers had deficiencies.

"There is no silver bullet," said Lennard.

"This is a problem that is multifaceted and really needs a broad approach and it really needs to be an industry solution."

Because of the three big global container shipping alliances — the 2M, Ocean and THE Alliance — and other similar ship-sharing agreements on other trades, "every company is on everyone else's ships," said Lennard.

One company may take all the precautions in the world to prevent carrying misdeclared or improperly secured cargo on its vessels, but the cargo of its customers or its ships may be in danger if a space-sharing partner does not take the same precautions.

Both Lennard and Kinsey said in addition to more inspections, there needs to be wider use of automation to do a better job of targeting which containers to inspect.

"You can't inspect every container.

It would be too costly and bring everything to a halt.

There are just too many containers being shipped," said Lennard.

"Just opening random containers is not as efficient.

The Coast Guard does both random and targeted inspections and there should be some component of each."

Kinsey believes the IMO is the proper organization to tackle the problem, saying it "needs to have the force of international law."

(from: freightwaves.com, September 6th 219)

RAIL TRANSPORT

DB CARGO 'SMART 'WAGON UPGRADE REACHES HALF-WAY POINT

DB Cargo has announced that it is "powering ahead" with the digitalisation of its operations with half of its wagon fleet now equipped with state-of-the-art telematics and smart sensors.

By 2020, the approximately 68,000 wagons which make up the company's German fleet will have digital technology on board - the result of investing "a high seven-figure sum."

DB Cargo said that GPS and sensor technology bring a range of benefits to its customers.

"A telematics module, GPS and the use of RFID and NFC tags help the analogue freight wagons join the fully connected digital world.

The modernised wagons use mobile telephony to transmit signals during the journey, such as when the wagon starts and stops or sensors detect an impact.

This data can help to produce useful information about the load condition, temperature and humidity and about the movement of sensitive cargo inside the wagon," it said in a statement.

Marek Staszek, member of the management board for Production at DB Cargo underlined that the smart freight wagons are modernising rail freight transport and making it fit for the future.

"Our customers are benefiting from more manageable logistics chains, higher-quality transport and predictable arrival times.

With these advantages, we want to achieve a lasting shift in traffic onto the environmentally friendly rail freight network and to make our contribution to 'Strong Rail' in Germany and Europe."

Commenting on the roll-out of the smart wagons, Jürgen Harland, head of Logistics and SCM at Salzgitter Flachstahl, a specialist in steel products

manufacturing and a customer of DB Cargo, said: "The value chain at Salzgitter Flachstahl GmbH relies heavily on efficient logistics processes.

The digitalisation of our business processes, which is focussing on connectivity, real-time capability, high quality and excellent service, is becoming ever more important.

The 'smart freight wagon' is the final piece in the puzzle.

The new data will refine and improve forecasts and assumptions as it provides information not just on the consignment but on quality, too."

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

ROAD TRANSPORT

EUROPEAN ROAD FREIGHT SEVERELY IMPACTED BY BREXIT 'DEMAND SHOCK'

One of Europe's leading full truckload (FTL) operators, Waberer's International, posted a decline in both revenue and earnings in the second quarter of the year, largely due to lower volumes in the aftermath of the UK's aborted 29 March Brexit date.

The Hungary-based operator said turnover was down 6.4% to €172.7 million compared to the same period last year despite 7% growth in its regional contract logistics activities.

Commenting on the Q2 performance, CEO Robert Ziegler said: "Waberer's second quarter results reflect several industry and company-specific factors that had adverse effects on the group's financials.

Notably, April was hit by a combination of market forces and internal issues.

The whole industry was severely impacted by the aftermath of the end-March Brexit date, when demand for transportation services inbound to the United Kingdom dropped dramatically as warehouses had previously been filled preparing for a disorderly Brexit."

He continued: "As a result of this 'demand shock', many of our clients shut down temporarily and European cross-border transportation capacities were redirected to continental Europe, pushing April and May prices down by as much as 5-10% year-on-year, a sharp contrast to the cost-driven fee increases that we had seen in the months before.

By the second part of May, the transportation market was recovering and normal trade flows on the continent and in the UK re-established and the price levels also normalised gradually until June."

Waberer's was also preparing for the new Brexit date of 31 October, Ziegler added.

"We have set up the necessary documentation, processes and organization to handle a 'no-deal' situation.

Our customer base is now quite well prepared, but uncertainties remain."

Figures released by Eurotunnel today showed that UK international truck traffic in July 2019 carried by its freight shuttles was down 10% compared to July 2018, "mainly due to the lack of recovery in the automotive market, and a slowdown in UK consumption".

Since the beginning of the year, more than 940,000 trucks have crossed the Channel on Le Shuttle Freight services, down 5%.

Second-quarter recurring or underlying EBITDA for Waberer's decreased by 41% to €12 million as the drop in volumes in April affected international margins.

Recurring EBIT showed a loss of €5.9 million, the company explaining that the second wave of its fleet reduction programme had begun with 300 additional trucks to be handed back, temporarily weighing on depreciation costs.

Waberer's had previously operated a fleet of more than 3,500 vehicles.

Teething troubles with the implementation of a new transportation management IT system had also had a negative impact on international operations and the Q2 financial results in April "but major issues have since been resolved", Waberer's underlined.

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

INTERMODAL TRANSPORT

RAIL CARGO: ROLLING ROAD (ROLA) AS PART OF THE 10-POINT PLAN

These days high-ranking talks are taking place in Innsbruck on the implementation of the 10-points plan, which the participants had drawn up at the traffic summit at the end of July in Berlin.

The Rolling Highway (RoLa) is a part of this plan.

By 2021, the capacities of currently 200,000 trucks can be increased to around 450,000 trucks per year.

At the traffic summit in Berlin at the end of July, the participants adopted a 10-point plan to relieve the population of heavy commercial traffic along the Brenner corridor.

The positive outcome of the talks was is also expressly welcomed by ÖBB.

Currently, in the Tyrolean federal state capital, high-level talks are being held about at official level on the implementation of the 10-point plan.

The Rolling Highway (RoLa) has for years been an attractive and effective instrument for the reduction of the traffic burden of the Tyrolean population and is also available as an important solution in the current transit problem via the Brenner Pass.

In the 10-point plan, the Rolling Highway is included under point nine "Increase in Rolling Highway capacity between Wörgl and Trento and others".

Currently, 18 trains per day are offered per direction on the Wörgl - Brennersee axis and three trains per direction on the Wörgl - Trento axis.

With the start of the first run-up phase on January 1, 2020, 21 trains per direction on the Wörgl - Brennersee axis or three trains per direction on the Wörgl - Trento axis will be available daily.

At the end of the expansion phase, as of 1 January 2021 there will be 24 trains per day per direction on the Wörgl - Brennersee axis and ten trains per direction on the Wörgl - Trento axis.

"New" - from 1 January 2020 there will be a daily train service on the Regensburg - Trento axis and return; from 1 April 2020, the offer will be extended to four daily trains per direction Regensburg - Trento.

At the end of the expansion phase as of 1 January 2021, five trains per day will be available in each direction at the Regensburg - Trento axis.

INCREASE IN CAPACITIES (TRUCK) IN FIGURES		
Axis	**Current (2018/19)**	**As of 01.01.2021**
Wörgl - Brenner	648 / day	864 / day
	186,624 / year	248,832 / year
Wörgl – Trento	126 / day	460 / day
	36,228 / year	132,480 / year
Regensburg - Trento	---	230 / day
	---	66,240 / year
Total capacities (trucks)	**206,000 / year**	**447,552 / year**

More than 1,300 fewer trucks on Tyrol's roads every day

All in all, this means that in the final configuration, there will be one RoLa train per hour and direction on the Brenner axle, which contributes to relieving truck traffic on the road.

At full capacity on the RoLa, this would mean more than 1,300 lorries per day on Tyrol's roads.

As far as rolling stock is concerned, ÖBB's Rail Cargo Group already has 58% quieter wagons in its Austrian freight car fleet and will have converted more than 90% of its Austrian fleet to quiet brake pads by the end of 2021.

The other railways are also quickly equipping their rolling stock.

In addition, ÖBB does a lot to prevent or at least minimise noise.

Over the past ten years, an average of 16 million euros have been invested annually in noise protection measures.

Throughout Austria, 970 km of noise protection walls and dams have been built along the ÖBB lines.

In the province of Tyrol, around 80 kilometres of noise barriers and dams have been built.

"The capacities are there.

The railways are ready," says ÖBB CEO Andreas Matthä.

Implementation of the 10-point plan

"The RoLa is already offering an environmentally friendly transport option for more than 200,000 trucks per year.

These capacities can be extended until 2021 to around 450,000 trucks," Matthä continued.

Günther Platter, Governor of Tyrol, also welcomes this positive development: "ÖBB is an important partner for Tyrol in many aspects.

ÖBB plays a very important role when it comes to relocation, because without a good, functioning offer for the economy we will not come any closer to the goal of relocation.

It is therefore very gratifying that ÖBB has put together an offer within a very short period of time, which creates opportunities for short-term relocation via the RoLa.

It is important to me that, in addition to building an ultra-modern, future-oriented and sustainable railway infrastructure with access routes and the Brenner base tunnel, we are already taking measures to relocate, thus making the use of the ROLA by the economy more plannable and attractive.

There is no question, however, that the increase in RoLA capacity is only one piece in the mosaic in the fight against excessive transit traffic.

I therefore call for the Berlin 10-point plan as a whole - above all the corridor toll - to be implemented as quickly as possible, otherwise there will be no relief for the transit-plagued population of Tyrol and Bavaria."

(from: transportjournal.com/railcargo.com, August 14th 2019)

TRANSPORT & ENVIRONMENT

CHEAPER COMPLIANT FUEL OIL STALKS GASOIL'S LEAD IN IMO 2020 SWITCH

When new global rules limiting the amount of sulphur in shipping fuels were announced, marine gasoil (MGO), a type of diesel fuel used on ships, was declared the early winner since most types readily met the new 0.5% limit on sulphur content.

But with only about 100 days before the International Maritime Organization's (IMO) rules start, analysts and traders agree that the scale of the MGO demand swing will not be as great as expected.

Instead, very-low sulphur fuel oil (VLSFO) has emerged as a dark horse to challenge MGO as a replacement for high-sulphur fuel oil, with a 3.5% sulphur limit, once the switch begins in 2020.

VLSFO for sale in October in Singapore, the world's biggest ship fuelling port, is currently indicated at $465.25 a tonne, according to data from brokers Starfuels.

That compares to MGO at $556 a tonne in the city-state, according to ClearLynx.

With the supply of VLSFO set to jump, shipowners are expected to lean toward the lower cost option.

At stake is which type of fuel will replace the 3.6 million barrels per day (bpd) of HSFO, the shipping industry currently consumes.

"In Europe and Singapore we've been successfully producing batches of VLSFO and we've been working hard with our customers to test those and try them.

The feedback has been positive," Sharon Weintraub, the Chief Executive Officer for Supply and Trading, Eastern Hemisphere, at BP Plc told Reuters.

"We expect most people will look to migrate to VLSFO.

However, there will be a proportion of more conservative customers who are looking to use MGO."

The global shipping industry was initially sceptical about the quality of VLSFO, but as 2020 approaches market participants agree there is growing confidence in VLSFO.

"The concern about quality is not as great as it used to be.

It's being tested left, right and centre.

Most of the fuels available are stable, fit for use, and in general of good quality," Lars Malmbratt, General Manager for Bunker Procurement at Swedish shipping company Stena Bulk said on Tuesday on the sidelines of an industry conference in Singapore.

MGO's established accessibility at ports bolstered expectations for its dominance while there were doubts about how well supplied low sulphur fuel oil variants could be.

"The closer we get to 2020, the more it seems there will be more low sulphur fuel oil than people previously thought," said Matt Stanley, an oil broker at StarFuels in Dubai.

Rising demand tide

Consultancy Energy Aspects said last month that the global refining industry is likely to produce more than 1 million bpd of VLSFO from now until the second quarter of 2020.

"If all this LSFO can be placed with shipping companies, which is not yet guaranteed given the lack of experience ship owners have with this fuel, diesel will be the loser," Energy Aspects analysts said in a note last week.

Even so, incremental gasoil demand growth because of the IMO 2020 switch will be between 1.4 million bpd, according to consultants FGE, and 2 million bpd, according to Energy Aspects, as some shippers prefer to stick with proven grades.

"There are still a small handful of ship owners who are not quite convinced about the quality of the VLSFO, and they would insist … to burn low sulphur gasoil, which is proven, has an ISO standard and is stable," said Justin Tan, bunker procurement manager at The China Navigation Co, Singapore.

Still, he added, "the industry is pressured… to find the most cost efficient way of operating a vessel."

The slowing economy is also working against MGO.

"The (gasoil) market is facing less of a squeeze than we had previously feared," said Emma Richards, Senior Oil & Gas Analyst at Fitch Solutions.

"The bigger issue… is the slowdown in global trade growth we're seeing, which will dampen demand for marine fuels as a whole, and the weakening of industrial demand for diesel, as global economic activity cools off."

Even so, the extent of the IMO 2020 switch will generate a notable draw on global fuel supplies.

"The market has underestimated the difficulty of supplying the new 0.5% sulphur gasoil material given the scale involved," said Sri Paravaikkarasu, a director at FGE.

(from: hellenicshippingnews.com, September 9th 2019)

INDUSTRY

WHAT DO INCREASED WEATHER RISKS COMBINED WITH NEW IMO 2020 SULPHUR REGULATIONS MEAN FOR THE SHIPPING INDUSTRY?

WNI (Weathernews Inc.) is fully ready to support customers needs regarding changes beyond the upcoming IMO 2020 regulations with cutting-edge weather forecasts and optimum routing solutions to save voyage costs and protect the natural environment.

SEVERE WEATHER AND NEW REGULATIONS

The gradual increase of severe weather conditions produces significant risks for voyage operations, and leaves operators and ship-owners more exposed to weather-related risks.

According to Joe Swift, Operations Leader at the Weathernews Global Center in Japan "rising air temperatures in recent years have led to more instability in the atmosphere, as well as an increase in the amount of water vapor that the air is able to hold.

Coupled with the rise in sea temperatures also seen, allows more evaporation to take place.

Taken together these two factors increase the amount of moisture in the atmosphere, which can cause more severe weather events.

Some examples would be extreme rainfall events, which could affect shoreside (port) operations, as well as more powerful tropical cyclones, which affect not only ports but also ships at sea as well.

While to date there has been no demonstrable correlation to a marked increase in the actual number of tropical cyclones forming, there seems to be a more frequent occurrence of very severe hurricanes and typhoons, which in turn lead to more extreme effects on the shipping industry."

As the shipping industry is preparing for the new IMO Sulphur Regulations, effective January 1st 2020, several solutions have been considered by ship owners to comply with the new rules.

Some owners have invested in scrubbers for their fleet to be able to still burn HSFO and hopefully keep their current fuel costs, while other owners believe

that sufficient LSFO will be available in most ports and accordingly choose to pay a higher price for the LSFO and therefore saving the investment in scrubbers.

There are pros and cons for both solutions based on our knowledge today and expectations for the future.

However, regardless of the choice, there are increased costs involved and with that the industry may have to look at different operational voyage priorities to minimize the overheads.

Additionally, as described by Brad Navarro, Head of Global Voyage Planning Operations at the Weathernews Oklahoma Operation Center: "Shifted weather patterns and increased frequency of severe weather conditions could be potential impacts of climate change.

When combined with more strict C/P weather clauses, it may become more difficult to present a performance claim due to a reduced number of "Good Weather Days."

As a consequence, Weathernews is encouraging operators to look at other ways to optimize voyages and save operational costs.

Our RPM/speed optimization service is ideal as it uses a vessel-specific performance model to optimize speed in order to balance hire and bunker costs while ensuring a safe passage.

With the expected increase in bunker prices as a result of the new IMO 2020 Sulphur Regulations, RPM/speed optimization service to balance hire and fuel costs will become even more valuable as vessel speeds generally reduce to minimize bunker costs, thereby adding sea passage days to the voyage and extending exposure to weather risks".

HOW IS WNI SUPPORTING OUR CUSTOMERS TO MEET THESE CHALLENGES?

Investment in forecast technology and big data utilization

For decades Weathernews Inc. has been at the forefront of the weather industry through innovative thinking.

One such example is the launch of our own satellites to support sea ice navigation and the commercialization of the Northern Sea Route, through our Global Ice Center in Tokyo.

Investing in forecast technology increases our ability to issue more reliable route suggestions and simulation output, improving the safety of crew and vessel, and ensuring the most cost-efficient voyage plan.

As the new IMO 2020 Sulphur regulations go into effect, slow-steaming to save expensive fuel will increase the number of voyage days at sea, increasing exposure to weather-related risks.

More accurate forecasts will be imperative to minimize voyage cost as well as reduce weather-related risks.

Since Weathernews has a vast amount of actual voyage data for different vessel types in our database, we can offer these data to our clients to make better voyage estimates for chartering activities.

These data consist of more than 1.3 million actual voyages spanning the past 12 years and are shared with clients to provide actual seasonal sea margins for many of the world's major trade lanes.

When combined with weather statistics for more than two thousand ports worldwide as well as actual ship-specific performance records of each client's fleet, Weathernews gives access to more accurate voyage estimates.

Case study: increased voyage cost savings by instructing the vessel to sail at an optimal RPM/Speed balancing hire and bunker costs.

Weathernews provides many tactical operational voyage priorities, which operators can choose from.

Recent studies by Weathernews demonstrate that finding the optimal RPM (or speed) to balance hire and bunker costs would benefit the shipping company to minimize the voyage costs under the new climatological and commercial environment.

By applying RPM (speed) optimization we aim to optimize both the route and the fuel allocation combined with the hire element, leading to overall cost savings for the voyage.

As part of this service, our customers will, prior to commencement of the voyage, be presented with the route and speed options with corresponding ETA, fuel consumption and total cost figures for each route/speed to support the operator's commercial decision making.

Let us look at a couple of examples

"Bulk vessel A" on a cross-Atlantic voyage was instructed to sail at warranted full speed and consumption.

Had the vessel instead been instructed to do a lower speed balancing hire and bunker costs there would have been a potential savings of US$2,500 in voyage cost.

When simulated assuming a 50% higher bunker price, an approximation of the effect of the IMO 2020 regulations on the market price of fuel, the potential savings could be as high as US$20,000 when compared to the total voyage cost associated with warranted full speed.

Conclusion: if a vessel is a good performer, making a performance claim unlikely, or there are potentially no "Good Weather Days" during the voyage based on weather forecast data, balancing hire and bunker costs through adjustments in speed can provide voyage cost savings.

If fuel process go up by 50%, the value of such a speed adjustment is almost 8 times higher, which means a substantially higher savings in voyage cost compared to warranted full speed instruction.

"Bulk vessel B" performed an 11-day cross-Atlantic voyage and was already instructed to adjust speed to balance hire and bunker costs.

The resulting speed led to actual demonstrable savings in voyage costs compared to the voyage performed at warranted full speed.

If we again apply the anticipated 50% increase in bunker prices next year, the speed would need further reduction in order to balance hire and bunker costs.

This reduction would lead to a potential additional savings of US$2,000, though for a short voyage.

Conclusion: for vessels already instructed to perform at a speed balancing hire and bunker costs, a 50% increase in fuel price could result in an even lower speed instruction resulting in increased voyage cost savings.

If "Good Weather Days" appear to be likely during a voyage operators have, in some cases, monitored the vessel for the first several days to see if the vessel is performing as expected in good weather.

If not, the ship operator might change voyage instruction from warranted speed/consumption to optimal RPM/speed balancing hire and fuel costs in order to keep voyage costs to a minimum.

Teaming up with performance analytics specialists

Apart from investments in forecasting technology, Weathernews is also engaging in partnerships with companies specializing in onboard route planning systems as well as performance analytics.

This ensures that Weathernews always has the best and most accurate tools available.

Performance analytics is crucial to understanding vessel performance at sea.

Weathernews collects navigational and performance data from vessels to ensure our vessel-specific performance model is calibrated frequently, allowing for the most accurate ETA and fuel oil consumption estimate based on the latest performance data and weather forecast.

By teaming up with industry-leading companies within the fields of performance analytics, our goal is to provide our customers with enhanced performance evaluations.

These evaluations can be used to better understand vessel behavior and performance at sea, allowing for improved voyage optimization for a wide range of weather and business scenarios.

Environmental reporting

With the introduction of new fuel regulations over the last several years, with both EU MRV and IMO DCS, Weathernews has supported our customers in complying with these regulations by offering services that support data-collection, data-cleansing and presentation of reports to relevant authorities.

By doing so, we give our customers the time to focus on other operational matters and the many administrative tasks involved with their daily operations.

The introduction of ESI (Environmental Ship Index) SOx Reporting is the next step in which Weathernews will provide service.

ESI is a collective initiative currently joined by more than 50 Port Authorities.

The ESI initiative's purpose is to incentivize the use of environmentally friendly vessels by using the ESI point-based system to provide financial discounts to reduce in-port costs.

(from: hellenicshippingnews.com, September 11th 2019)

LOGISTICS

DEUTSCHE POST SIGNS UP FOR MASS ELECTRIC DELIVERY VEHICLE PRODUCTION

Deutsche Post subsidiary StreetScooter and Chinese automobile manufacturer Chery Holding Group have agreed to form a joint venture for the mass production of electric delivery vehicles for the international and Chinese markets.

The two companies said they "plan to develop an electric light utility vehicle for the international market in selected countries", with the project including local manufacturing and sourcing as well as nationwide sales and service.

"As outlined in the memorandum, the entry of electric light commercial vehicles into the Chinese market will be gradual," the companies said.

"Mass production is scheduled to begin in 2021 with production capacities of up to 100,000 electric vehicles per year."

Anticipating a total investment up to €500 million, the new joint venture intends to target major fleet operators in the areas of last-mile delivery and e-commerce as potential customers.

Chery is one of China's leading automobile manufacturers, with a 20% market share in the electric commercial vehicles sector.

The market entry of StreetScooter in China continues the internationalization of the company after the strategic cooperation with the Japanese logistics company Yamato.

The agreement establishing a joint venture between the two companies was reached during German Chancellor Angela Merkel's trip to China.

The memorandum was signed by StreetScooter CEO Jörg Sommer and Chery Holding chairman Yin Tongyue, in the presence of the heads of both the German and Chinese governments in the Great Hall of the People in Beijing.

"This production and sales agreement is a major milestone in our company's, as yet, short history," said Sommer.

"We're thrilled about the upcoming collaboration with our partner Chery and this opportunity to open up the world's largest market for electric light commercial

vehicles, introduce our energy, logistics and fleet solutions and create a local source of value creation.

StreetScooter now has a commercial presence in Japan and China, the two most important national economies in Asia."

Yin outlined the strategic importance, noting: "The strong cooperation between Chery and StreetScooter will create opportunities for both parties to explore the global market, especially in the EU and China.

It will also help Chery to further accelerate the development of innovative solutions based on new energy and smart interconnection and therefore surpass traditional fuel vehicles.

Chery will actively integrate the global unique resources and know-how through open cooperation and customer centric unique-selling-propositions and offerings."

The joint venture also aims to establish a location for research and development in China, focusing on developing eLCV components, technology, vehicle architecture and design, autonomous logistics and energy solutions.

The Chinese market for light commercial vehicles is expected to reach 2.3 million trucks by 2025, over 900,000 of which are forecast to be electric.

Such rapid growth will make China the largest market in the world for electric vehicles of this kind, followed by Europe and the US, the companies said.

"Market growth is being driven by numerous factors: urbanization, rising transport volumes in downtown delivery traffic (last mile), related municipal rules and regulations on vehicle emissions, and new mobility, logistics and energy solutions."

The "major sales potential" for the soon-to-be jointly produced electric vehicles will be met via a regionally tailored version of the StreetScooter products and services, the companies said.

StreetScooter was fully acquired by Deutsche Post DHL Group in 2014 and is currently a market leader in electric light commercial vehicle production – with

more than 12,000 vehicles in daily use and a track record of over 100 million kilometres driven and 36,000 tonnes of CO2 savings.

StreetScooter has also electrified more than 700 depots and installed more than 11,000 charging points for small and large fleet operators.

The company said it is "transforming itself from an electric vehicle manufacturer into one of the leading global energy and logistics platforms for the last mile".

Chery Holding Co. is an automotive specialist that has sold almost 8 million passenger vehicles and exported more than 1.5 million units, ranking as China's top exporter of passenger vehicles for 16 consecutive years.

(from: lloydsloadinglist.com, September 10th 2019)

LAW & REGULATION

EU STUDIES REFORM OF "OUTDATED" ENERGY TAXES, HIGHER LEVIES FOR SEA AND AIR TRANSPORT

The European Union is studying a reform of energy taxes to align them with climate targets, an EU document showed, listing as possible measures higher minimum tax rates, fossil fuel levies and the end of waivers for the air and sea transport sectors.

The document, seen by Reuters, was prepared by the Finnish presidency of the EU ahead of a meeting of the bloc's finance ministers on Saturday in Helsinki, which will discuss the matter.

EU rules on energy taxation have not changed for more than 15 years and they appear "outdated and poorly adapted to climate change challenges and developments in energy policy at EU level," the document says.

In the last decade, EU countries have led the global shift towards renewable energy and set up the world's largest emissions trading system to price carbon and reduce reliance on more polluting fuels.

But their taxes have not reflected these changes, as existing taxation "does not differentiate between renewable and carbon-intensive sources of electricity," the document says.

The confidential paper, which is not binding on EU authorities, urges a review of minimum tax rates for energy products, which currently differ among EU states and do not reward sources of energy for their efficiency.

"The minimum rates for electricity and heating fuels, for example, are too low to give an adequate price signal to energy users," discouraging investment in energy efficiency, the document says.

It also calls for an end to energy tax exemptions granted to the aviation and maritime transport sectors in the EU, as they are "not in line with the decarbonisation objectives of the Union's transport policies."

By increasing taxes on more polluting energy products, the EU could more effectively contribute to the fight against climate change, supporters of the plan say.

Ambitious targets for reducing carbon emissions by at least 50% by 2030 are part of the agenda of the new European Commission which will take office in November.

However, opposition from some of the 28 EU states has in the past blocked energy tax reforms.

A plan from the EU executive to revise energy taxes was struck down in 2015, as eastern European states who rely on cheaper carbon fuel feared higher costs and Western countries were keen to protect some of their transport industries against global competition.

Opposition to changing the existing rules, which date back to 2003, is likely to remain strong, but the Commission's president-designate Ursula von der Leyen has promised big changes and is expected to invest much of her political capital on the reform.

"It has been repeated time and again that we need to tax resource use more and labour less.

It's time to do it.

We hope that the future review of the energy tax directive will support this objective," said Johan Barros, Tax Policy Manager at Accountancy Europe, a trade association.

EU tax overhauls are made more difficult by provisions that require unanimous support from all member states to carry them out.

Von der Leyen has called for ending these provisions and a decision by majority.

A confidential work programme prepared by Commission officials before von der Leyen's appointment in July envisages legislative proposals to end tax exemptions for air and sea transport by early 2020, and the review of minimum tax rates for energy products by the end of next year.

In both cases, the overhauls should be decided by majority, the document said.

(from: hellenicshippingnews.com/reutres.com, September 10th 2019)

STUDIES & RESEARCH

SHIPPERS PREPARE FOR SHARP OCEAN FREIGHT FUEL PRICE RISES

Many cargo owners remain unclear about the impact on their freight costs of the incoming 'IMO 2020' low-suphur shipping fuel rules, although better information is now becoming available, says container shipping analyst and data expert Drewry – which is launching a 'low-sulphur bunker price tracker'.

Drewry said that for several years, "one of the biggest and hardest questions to answer in international shipping has been: what will the new low-sulphur fuel cost from 2020?".

But it said shippers, forwarders and carriers are getting a better idea of costs and data sources.

"Everybody – or nearly everybody – agreed that there will be a large, extra cost for the industry and its users," Drewry noted.

"But shippers surveyed by Drewry on the IMO 2020 issue admitted that 'data is patchy and confusing' and a high proportion of shippers replied that they were very uncertain about the impact of IMO 2020 on their freight costs."

Largely as result of this, Drewry developed an IMO Cost Impact Calculator, but said "this required us making our own forecast of the 2020 cost of low-sulphur fuel, because there is no established price in the market for the new fuel.

This is changing.

In July and August, early indications of prices for low-sulphur fuel oil 0.5% (0.5S) compliant with the IMO 2020 rule showed that the new fuel costs about 30% more than the current, high-sulphur IFO380 fuel at Asian ports which have started selling it.

This price is based on actual bunkering transactions for ships which trade with Chinese ports, where the 0.5S requirement is already implemented.

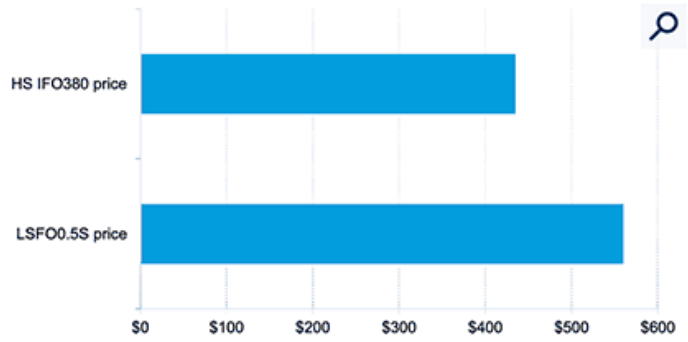
The low-sulphur 0.5S price in the major port of Singapore is about $560 per tonne."

However, Drewry said it was asking customers "to be careful when using these early price indications, because the demand for low-sulphur fuel will increase

considerably by November/December and market conditions will be very different then".

To assist shippers, forwarders and carriers who need to revise their bunker charges before and after the switch to low-sulphur fuel, Drewry started a publicly-available Low-sulphur Bunker Price Tracker, which will be updated every quarter and also in December, when many contracts will require data on the new fuel cost.

Figure 1: Current cost differential between high-sulphur and low-sulphur (0.5%S) bunkers in the port of Singapore ($ per tonne)



Note: Covers period from 1 July to 14 August 2019
Source: Drewry Supply Chain Advisors

"Contractually, the ability of shippers and providers to adjust their Bunker Adjustment Factors at an appropriate time towards the end of 2019 – various switching dates can be negotiated – and at a fair cost is a top priority for the next few months," Drewry noted.

"Shippers who have redefined their BAFs and their bunker indexing mechanism to take into account the IMO 2020 change have nearly always agreed that carriers need to be compensated for the price differential between low-sulphur and high-sulphur fuel – even though some 5% of total capacity is equipped with scrubbers.

We believe that the chances are that low-sulphur bunker prices will, after increasing in 2020, fall in 2021 and 2022, as the initial price premium decreases."

But Drewry said there will be several major indirect repercussions from the switch to low-sulphur fuel regulations:

- Shippers will pay a lot more attention and scrutiny to the Bunker Adjustment Factors than in the past.

- Smaller ships – which tend not to be equipped with scrubbers or with efficient engines - will be shunned by carriers even more than in the past.

- Some aggregate ship capacity will be cut (scrapped) and shipowners will incur capital losses on some of their now-obsolete vessels, built at a time when pollution regulations were lenient.

- Paradoxically, shipping lines with a high use of scrubbers (avoiding the extra cost of low-sulphur fuel) will be able to continue to buy a lot of high-sulphur

fuel and will become more cost competitive and better insulated from low-sulphur price volatility than other shipping lines.

"The one remaining area of uncertainty is whether carriers will resort to more slow-steaming in the era of more expensive bunkers; watch this space," Drewry noted, concluding: "Bunker adjustment factors will soar between 4Q19 (fourth quarter 2019) and 1Q20, first, and will be very volatile in the first half of 2020."

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

REEFER

REEFER SHORTAGE PERSISTS AS PERISHABLES SHIPPERS OPT FOR BOXES, ONE ORDERS 6,000

Container shipping lines are rushing to order refrigerated containers (reefers) to plug an emerging gap between supply and demand in global perishables trades.

Japanese carrier ONE yesterday announced an order for 6,000 40ft high-cube reefer units, which will take its reefer fleet up to 240,000 teu at the end of the year.

A year ago, it added 14,000 40ft units to the fleet and its latest order includes 500 units equipped with advanced controlled atmosphere (CA) technology, to "slow down the respiration and ripening process to maximise the shelf life of fruit and vegetables".

According to the latest research by Drewry Maritime Advisors, which this month publishes its latest Reefer Shipping Annual Review and Forecast 2019/20, reefer containers have been scarce since 2016, when there was a "dramatic halt in reefer equipment expenditure by cash-strapped shipping lines in 2016 which led to acute shortages in several regions".

Although carrier investment in reefers has rebounded, and Drewry expects the global reefer fleet to grow by 4.5% a year over the next five years, demand for equipment is expected to continue to outstrip supply until at least 2023 – in contrast to available reefer slots on vessels, which the analyst described as "ample".

"While we expect container carriers to continue to improve the effective availability of reefer containers through more centralised inventory and imbalance management, Drewry's data indicates that equipment supply conditions will remain tight," said Drewry's director of research products, Martin Dixon.

"With cargo owners increasingly reliant on container carriers to move perishable products, given the ongoing decline in the specialised breakbulk reefer shipping fleet, refrigerated shipping capacity could be constrained during seasonal peaks," he added.

However, Drewry also noted that the growth of seaborne refrigerated volumes – which include both reefer container and breakbulk shipments – has begun to decline, "driven by a slowdown in shipments of meat and poultry, fish and seafood, and banana shipments, as well as a contraction in deciduous trade".

Last year, the global trade in perishable goods amounted to 129m tonnes, a 3% growth over the year before and less than the 3.5% average annual growth recorded between 2007 and 2017.

Drewry said it expected the trade to grow at an annual rate of 2.7% through to 2023 – although that is not necessarily a bad omen for box carriers, which have continued to expand their market share at the expense of conventional reefer carriers and are expected to carry 85% of shipments by 2023; the shortage of equipment will allow them to command strong freight rates.

"Hence, despite a slowdown in the pace of growth in global seaborne perishable cargo trade, the additional boost of modal shift is providing container carriers with an attractively expanding market in reefer cargo," Mr Dixon continued.

"Excluding a particularly weak 2019, caused by certain one-off weather-related factors, forecast growth thereafter is expected to match that of the wider container shipping market, with annual growth of around 4%.

And, together with tight container equipment availability, we expect reefer container freight rates to continue to outperform dry box rates," he added.

The other area which will help perishable shippers is the continuing investment in reefer monitoring platforms, utilising IoT, telematics and artificial intelligence, which allow shippers and their logistics providers to monitor goods while in transit.

Hong Kong-headquartered line OOCL yesterday became the latest carrier to unveil an upgraded monitoring platform.

Its MyOOCLReefer (MOR) provides "information such as the container's real-time location, both on land and at sea, as well as visibility over temperature, humidity and other atmospheric data are right at their fingertips, anytime, anywhere".

(from: theloadstar.com, September 3rd 2019)

ON THE CALENDAR

▪ 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.