



PROGRAMME

EUROPEAN SHIPPERS' COUNCIL
IN PARTNERSHIP WITH
MARE FORUM

**SHIPPER
FORUM
2005**

What is the PRICE of FREIGHT today
and what it will be tomorrow

Kempinski Hotel Atlantic
5 OCTOBER 2005
HAMBURG - GERMANY



**S H I P P E R
F O R U M
2 0 0 5
I N T R O D U C T I O N**



EUROPEAN SHIPPERS' COUNCIL
in partnership with
MARE FORUM
organising the
SHIPPER FORUM 2005

5 October 2005 - HAMBURG - GERMANY.

It takes a lot of players to carry goods from where they are made to where they are sold. As the freight markets swing, different players feel they are carrying more of the load than the others. Today, the shipowner carries the stick. For the last few years, the shipowners thought the charterer had it. And the port owners think both of them have it, and are using it to beat them.

In the midst of this market mayhem come politicians, anxious to have safe, clean, efficient shipping. They wave big sticks, but don't always seem to have the right target.

At the 2005 Shipper Forum, in Hamburg on 5th October, all these players, and the brokers, bankers, information providers and standard setters who keep the wheels of the market turning will all gather to see if there are better ways to get goods onto shelves. What will the markets do next, and can shippers and shipowners protect themselves from market swings? Will the price of security be paid fairly? Can ports do more? Should they do more? And where will the money come from to finance trade?

Join a heady mixture of shippers, shipowners, port operators, bankers, politicians and brokers to debate the future of shipping in Europe, with the people closest to the consumer, the shippers, in the forefront. Everyone who attends gets a chance to have their say, no-one gets a chance to say more than their share. It's not a conference, it is a controlled explosion of debate, point scoring, problem solving and bridge building.

Come to Hamburg and join in. You'll make new contacts, build new businesses and leave with a better understanding of how all the parts of shipping fit together.

The partnership between European Shippers' Council and Mare Forum in producing the annual Shippers' Forum has succeeded in creating the definitive forum for the maritime supply chain and the 2005 Shipper Forum will once again identify, examine and debate key issues for the industry.

It is an event not to be missed, and we look forward to welcoming you to the Forum on October 5th in Hamburg.

O R G A N I S E R S

Jannis KOSTOULAS
Managing Director
Mare Forum

Nicolette VAN DER JAGT
Secretary General
European Shippers' Council



The European Shippers' Council represents the interests of European industry as users of all modes of transport. The 14 national member organisations represent all branches of industry and commerce, who in turn represent thousands of companies who transport the majority of cargo shipped by road, rail, inland waterways and sea within Europe, as well as overseas. The ESC operates from offices in Brussels and has amongst its priorities to promote efficient and commercially attractive freight transport services and to enhance the competitiveness of companies conducting business in Europe and in overseas transport markets.

The ESC Shipper conference is the yearly event when Europe's leading users of freight transport services come together to discuss the principal issues of interest and concern to buyers of freight transport services with the suppliers of those services.

The conference attracts leading decision makers responsible for the procurement and movement of freight throughout and to and from Europe. They include: shippers, freight forwarders, shipping lines, railways, intermodal operators, airlines, road hauliers, logistics companies and national government and EU officials responsible for the development of transport policy.

The ESC annual conference was established in 1996 with the support of the Port of Antwerp. Since this first inaugural conference, the conference has become one of the leading annual industry events. The hosting ports have included the ports of Barcelona, Marseilles, Rotterdam, Copenhagen, Pireaus, and Antwerp.

SHIPPER FORUM 2005

5 OCTOBER
Kempinski Hotel Atlantic

PROGRAMME

SHIPPER
FORUM
2005

SESSION 1 FORECASTING THE SHIPPING MARKETS

CHAIRMAN

08.00 Delegate Registration and coffee
09.00 **OPENING** by the Conference Chairman
John Guy
Partner
Merlin Corporate Communications

WELCOME

09.05 **WELCOME AND KEYNOTE ADDRESSES**
Dick van den Broek Humphreij
Chairman, European Shippers Council
**The price of transport – Is transport too cheap?
Can we do it with less transport?**

SESSION 1 FORECASTING THE SHIPPING MARKETS

SPEAKERS

09.35 **Dagfinn Lunde**
Member of the Board of DVB Bank and CEO of the Shipping Division
**World Trade & Energy Movements, and Where Europe
Fits into the Global Picture. Geopolitical challenges –
cargo growth projections and opportunities: the China –
India – Brazil - Russia - Middle East - USA factors**

09.50 **Nick Hubbard**
Howe Robinson Shipbrokers London
Chris Bourne
Executive Director of the European Liner Affairs Association
Containers

10.10 **Nicolai Hansteen**
Chief Economist, Lorentzen & Stemoco
Dry and Liquid Bulk

10.20 **Basil Papachristidis**
Chairman, Hellenic Steamship Corp.
**Can Germany do for the tanker market what it has done
in container shipping?**

10.30 break

11.00 Debate between panelists and participants on the following themes:
**Supply and Demand:
Are freight rates going up or down?
What can shippers expect of freight rates with the view
of the substantial new tonnage to come into operation?
Will bigger ships result in more competitive and lower
rates?**

DISCUSSION PANELISTS:

DISCUSSION PANELISTS

Bernd Roth
Director Maritime Transportation, Airfreight and Bulk
Terminal Services, BASF

Chris Bourne
Executive Director of the European Liner Affairs Association

Nick Hubbard
Howe Robinson Shipbrokers London

Nicolai Hansteen
Chief Economist, Lorentzen & Stemoco

Dagfinn Lunde
Member of the Board of DVB Bank and CEO of the Shipping Division

Basil Papachristidis
Chairman, Hellenic Steamship Corp.

Gunther Kempf
OPDR Hamburg

SESSION 2

LONG TERM FINANCING OF CARGO MOVEMENTS OPTIMISATION: SYNERGY BETWEEN OWNERS-SHIPPER-CAPITAL PROVIDERS

How can shippers/charterers protect themselves against sudden upswings in rates? Can freight rates be hedged to stabilise the market? Spot, Time Charters, Coas & Derivatives: Status Quo or Fresh Ideas? Should banks and end users be working more closely to create win-win partnerships that endure? FFA's Developments Should shipping banks be involved in futures and derivatives? A comparative review of alternative methods of ship finance: banks, bonds, KGs KS, stock markets etc.

SESSION 3

THE PRICE OF SUPPLY CHAIN SECURITY

12:00

Lunch hosted by **GERMANISCHER LLOYD**



SESSION 2

LONG TERM FINANCING OF CARGO MOVEMENTS OPTIMISATION: SYNERGY BETWEEN OWNERS-SHIPPER-CAPITAL PROVIDERS

SPEAKERS

13:20

Filip Beckers

Transport Procurement Manager, Masterfoods

13:30

Andreas Opatz

Managing Director, Koenig & Cie. GmbH & Co. KG

13:40

Tom Even Mortensen

Managing Director, IMAREX

13:50

Speaker to be announced

14:00

Debate between panelists and participants on the following themes:

What are the best mechanisms for financing the needs of a trade in the current Market?

Shippers vs. Freight prices: insourcing or outsourcing?

DISCUSSION PANELISTS:

Pierre Aury

Managing Director, Clarkson Capital Ltd

Filip Beckers

Transport Procurement Manager, Masterfoods

Andreas Opatz

Managing Director, Koenig & Cie. GmbH & Co. KG

Tom Even Mortensen

Managing Director, IMAREX

Representative

Managing Director, MPC Steamship

14:50

break

SESSION 3

THE PRICE OF SUPPLY CHAIN SECURITY

SPEAKERS

15:10

Wolfgang Elsner

Head of Unit, Transport of dangerous goods and intermodal security Directorate Energy and Transport European Commission

What would the new EU legislation on supply chain security mean for shippers and other parties in the supply chain?

How much will supply chain security cost?

What are the potential gains for shippers?

15:20

Peter C. M. Dumoulin

Head Corporate Export Controls and supply chain security, Philips

What are the costs/benefits of implementing supply chain security for shippers?

15:30

Bernhard Staender

Managing Director Germanischer Lloyd Certification GmbH

Existing and expected security standards for certification:

- **Maritime security (ISPS Code)**

- **US-customs regime (CTPAT)**

- **Upcoming standards/provisions (ISO and WCO)**

More current information concerning the conference can be found at:

<http://www.mareforum.com>

SESSION 4

CONSOLIDATION IN THE PORT SERVICES AND LINER INDUSTRY – WHO'S NEXT? THE EUROPEAN PORTS UNDER SIEGE. - WHO IS RESPONSIBLE? HOW TO SOLVE THE PROBLEM

Both terminal operators and liner shipping are driven by globalisation. This session will review the expectations on what will happen next and review the relation between terminal operators and the carriers who are moving towards partnerships. Speakers will review the role of the shipper who may turn out to become the lonely partner.

Finally, stakeholders will in a panel debate discuss the latest status of the second port services directive.

DISCUSSION PANELISTS

15:40

Debate between panelists and participants on the following themes:

What can realistically be done?

Who will pay for all these measures?

How will more stringent measures impact shippers' supply chains?

DISCUSSION PANELISTS:

Wolfgang Elsner

Head of Unit, Transport of dangerous goods and intermodal security

Peter Du Moulin

Head Corporate Export Controls and supply chain security, Philips

Bernhard Staender

Managing Director Germanischer Lloyd Certification GmbH

Marco Sorgetti

Director General CLECAT

16:10

break

SESSION 4

CONSOLIDATION IN THE PORT SERVICES AND LINER INDUSTRY – WHO'S NEXT? THE EUROPEAN PORTS UNDER SIEGE. WHO IS RESPONSIBLE? HOW TO SOLVE THE PROBLEM

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SPEAKERS

16:20

Diego Teurelinx

Secretary General FEPORT

The view of the container terminal operator on the process of globalisation and further consolidation in the port industry and how this is translated into better service for the shipper.

16:30

Guiliano Galanti

Chairman European Sea Ports Association

Are port authorities irrelevant to the shippers' supply chain? Have port authorities just become landlords or can they add value to the supply chains?

16:40

Michael Hassing

CEO and President Samskip

Do European ports facilitate the development of short sea shipping?

What are the challenges for short sea shipping?

How much damage can be inflicted on short-sea operators if port authorities and terminal operators didn't improve their service to customers?

16:50

Klaus Herms

CEO Kuhne & Nagel

Does industry consolidation in the liner and terminal industry serve the customer?

Does consolidation in the logistics industry serve the customer?

Do ocean carriers understand their customers or can freight forwarders provide a more customised service?

What can ocean carriers learn from the freight forwarding industry?

17:00

Stefan Sundin

Director Transport, Stora Enso Transport and Distribution

Is concentration in the port/liner and logistics industry to the advantage/disadvantage of the shipper?

Will the shipper become the lonely partner or be at the mercy of service providers?

17:10

Debate between speakers and participants

Interested parties will discuss the impact for the port, shipping industries and shippers of the implementation of the EU proposal on market access to port services and debate the way ahead

18:00

CONCLUSIONS by the conference chairman

18:05

DRINKS hosted by



19:30

RIVER CRUISE HOSTED BY THE



GENERAL INFORMATION

OFFICIAL LANGUAGE

The official language of the conference will be English.

VENUE

The conference venue will be the

Kempinsky Hotel Atlantic Hamburg

An der Alster 72-79

20099 Hamburg

TEL: +49 40 28 88 817

FAX: +49 40 28 01 986

Beurs-World Trade Center is situated in the heart of Rotterdam, on walking distance of Rotterdam Central Station NS. Each 3 minutes a direct connection takes you to Amsterdam Schiphol Airport.

Surrounding Beurs-World Trade Center you'll find several 4 and 5 star hotels. Parking lots and metrostation Beurs are nearby and on walking distance of the congress center.

REGISTRATION

All participants who wish to attend the conference must be registered. Participants are requested to return one registration form per participant to MARE FORUM by fax, or by mail, at the fax number or address listed below. Please note that your registration is Person - Restricted, which means that only the registered participant will be admitted for any of the activities of the conference. A Person Restricted Pass for conference participation may not be shared by more than one person. Please keep a copy of the form, and your payment, for your records.

CONFIRMATION

Upon receipt of the registration form you will receive a confirmation via e-mail which will make your registration definite. A formal letter of confirmation and an invoice will be sent to your mailing address after receipt of the payment of the conference fee. Please present this confirmation at the registration desk at the conference venue as proof of your registration.

REGISTRATION FEES

Person-restricted pass:

Person Restricted Pass: EURO 600,- + EURO 114,- (19% VAT)

Total Amount: EURO 714,-

The conference fee includes: conference attendance and documentation, refreshments, luncheon, receptions and dinner during scheduled breaks in the conference programme.

Payment for the conference can only be made in EUROS by CREDIT CARD PAYMENTS (MasterCard, American Express or Visa). Please fill in appropriate sections on the Conference Registration Form should you wish to attend.

Payment for hotel accommodations must be made directly to the hotel in EURO'S as noted on the Hotel Registration Form.

PAYMENT PROCEDURES

Payment for the conference can only be made in EUROS by CREDIT CARD PAYMENTS (MasterCard, American Express or Visa). Please fill in appropriate sections on the Conference Registration Form should you wish to attend.

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CANCELLATIONS

In case you are unable to attend the conference for any reason at all, no refunds will be made by Mare Forum.

Mare Forum only offers the opportunity to send in a substitute participant at no extra charge if he/she carries a letter of authorisation from the original delegate. The conference office must be notified of the name of the substitute participant before the conference takes place.

INSURANCE

The conference organisation cannot accept any liability for personal injuries or for the loss of and/or damage to personal belongings of the participants, either during or as a result of the conference. Please check the validity of your personal insurance.

F or further information on the conference please contact:

MARE FORUM

Beurs-World Trade Center

P.O. Box 30027, 3001 DA Rotterdam

The Netherlands

info@mareforum.com

Tel.: +31.10.281.0655

Fax: +31.10.270.9870



MARE FORUM

Mare Forum, organisers of the influential Mare Forum conferences, specialises in conference management, project development and policy marketing.

Mare Forum's goal as a professional conference organisation is to bring together policy makers and chief executives of industry in a decisive dialogue and debate, where business strategy and policy-making for today and tomorrow's issues can be realised with optimal results.

Mare Forum has frequently created groundbreaking and progressive concepts, developing them into conferences on an international level, and drawing worldwide attention.

The international conferences of Mare Forum have attracted the active participation of governmental officers, policy makers and businessmen, and have resulted in the creation of new policy, effective networks and fresh perspectives of the future.

Mare Forum collaborates with a large scope of international organisations, and in the process of expanding its research and promoting new projects, maintains an active network of forward-thinking, high-level individuals in a range of sectors.

CONFERENCE REGISTRATION FORM

SHIPPER FORUM 2005

Hotel ATLANTIC, HAMBURG
5 October 2005

Please read Mare Forum's conditions and cancellations policies carefully before registering.

To register for the conference, please complete this form in **PRINTED CAPITALS** and return it to Mare Forum by fax: **+31 10 270 98 70**

Only one delegate should register with this form. Extra copies can be obtained from the conference office, or copies of this form may be used.

For further questions contact Mare Forum on
T: **+31 10 281 06 55**
E: info@mareforum.com
ruth@mareforum.com

Delegate's name (Mr./Ms./Mrs.) Circle one

Last Name		First Name	
Company		Job Title	
Mailing Address			

Postal Code	City	Country	
Telephone	Fax		
E-mail			

• **Conference Fee**

Person-restricted Pass: € 714,00 (incl. 19% VAT)

(The conference fee includes attendance and documentation, refreshments, luncheons, receptions and dinners during scheduled breaks in the conference program)

• **Payment Method**

Credit Card (please check credit card and provide necessary information)

American Express Master Card VISA

Cardnumber:	_____	
Expiration Date:	_____	
Safety Code: <small>(last 3 numbers on back of card)</small>	_____	
Cardholder's name:	_____	Date: _____
Cardholder's address:	_____	Signature: _____

CONDITIONS

All participants who wish to attend the conference must be registered. Your registration is Person - Restricted, which means that only the registered participant will be admitted for any of the activities of the conference.

Upon receipt of the registration form you will receive a confirmation via e-mail which will make your registration definite. A formal letter of confirmation and an invoice will be sent to you by post after receipt of the conference fee.

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Please take note that the Visa for the substitute participant must be arranged before the conference.

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The conference organisation cannot accept any liability for personal injuries or for the loss of and/or damage to personal belongings of the participants, either during or as a result of the conference. Please check the validity of your personal insurance.

I agree with Mare Forum's conditions.

Date: _____

Signature: _____



Hotel Atlantic
Kempinski

HAMBURG

Reservationsheet

Mare Forum October 04-06, 2005

Name: _____
Company: _____
Address: _____
Phone: _____
Fax: _____
E-mail: _____

Arrival: _____
Departure: _____

- Single Superior Room EUR 185.00 per room and night
 Double Superior Room EUR 225.00 per room and night

The above mentioned room rates include 16% VAT, service charges and the complimentary use of our Pool inclusive sauna and fitness area. Our rich buffet breakfast will be charged separately with EUR 23.00 per person and day.

The rooms have to be booked by August 25, 2005.

Credit Card Number: _____
Expiry Date: _____

In the event of bookings cancelled after 24 hours before arrival, we keep the right to charge 90% no show or cancellation fee.

Date: _____ Signature: _____

Hotel Atlantic Kempinski Hamburg
Reservations Department
An der Alster 72-79
20099 Hamburg

Tel. +49 40 28 88 817
Fax +49 40 28 01 986

Confirmation Number:

Stamp, Signature: