



BUILDING LOCAL BRIDGES FOR A GLOBAL SUPPLY NETWORK

TOC ASIA 2023

TOC Asia returns to **Singapore**, taking place on **28th & 29th November 2023** at the **Marina Bay Sands**.

The content programme of this year' edition of TOC Asia will be divided in two tracks: Container Supply Chain (CSC) and TECH TOC, with the first addressing key elements for the maritime & logistics sector in Asia and the Pacific while the second will place the spotlight on the latest innovations in port & terminal equipment and technology.

By means of insightful presentations and engaging discussions the audience will have the opportunity to learn from a line-up of experts in maritime & logistics of regional and international scale. Additionally, TOC Asia's tradeshow exhibition will feature the latest solutions coming into the game, and how these are revolutionizing the industry.

Sessions to be included at the Container Supply Chain (CSC) programme:

- **DAY 1 – 28TH NOVEMBER**
 - **PLENARY SESSION**
 - **MARKET & TRADE OVERVIEW**
 - **SUPPLY CHAIN MANAGEMENT & RESILIENCE**
 - **INFRASTRUCTURE DEVELOPMENT & INVESTMENTS**
- **DAY 2 – 29TH NOVEMBER**
 - **REGIONAL SPOTLIGHT**
 - **DIGITALISING MARITIME TRADE**
 - **A HOLISTIC APPROACH TO ENERGY TRANSITION**



CONFIRMED SPEAKERS

- **Ashna Mishra**, Global Lead – Shipping Strategic Engagement & Intelligence, **S&P Global Commodity Insights**
- **Han Ning**, Principal Consultant, **Drewry**
- **Jeroen Overbeek**, Consultant Maritime Civil Engineer & APAC Regional Manager, **Waves Group**
- **Jonathan Beard**, Partner – Infrastructure Advisory, Strategy & Transformation Asia-Pacific Platform, **Ernst & Young**
- **Budi Cahyono**, Vice President Director, **Jakarta International Container Terminal (JICT)**
- **Dr Prapisala Thepsithar**, Director, Research & Projects, **Global Centre for Maritime Decarbonisation**
- **Aasim Siddiqui**, Managing Director, **Pakistan Intermodal Ltd.**
- **Indranil Sen**, Industry Practice Lead – Maritime & Logistics, **NCS Group**



TUESDAY 28TH NOVEMBER

9:45 – 10:00

WELCOME SPEECH

10:00 – 11:00

PLENARY SESSION

Senior representative from DP World to be announced.

11:30 – 13:00

MARKET & TRADE OVERVIEW

The post-covid years have been marked by uncertainty resulting from international tensions and political unrest, with strong inflation causing interest rates to go up, leading to economic recession around the world.

In Asia, inflation varies from one subregion to another. According to the Asian Development Bank's economic forecast from July 2023, the inflation landscape in the region is mixed: While the Caucasus and West Asia maintain an elevated average of 10.6% (with a 7.8% forecast for 2024), inflation in East Asia is experiencing a sharp decline reaching 1.3% (and predicted to go up to 2.1% in 2024), South Asia's inflation forecast is expected to decrease from 8.1% to 6.4% in next year, and Southeast Asia has managed to keep inflation at 4.3%, with an expected reduction to 3.2% in 2024.

Despite the optimism that inflation deceleration may cause, economies remain cautious, which translates into slow consumer spending, with China experiencing a significantly lower than anticipated performance. In fact, specialists are not sure if its GDP will meet the target set by Beijing for 2023. The slowdown in China's economic growth, however, predates this year and the pandemic, with a constant decrease over the last decade. A responsive measure to this, aiming to revitalize the country's trade capacity and streamline procedures are the new measures to be implemented in six of its Free Trade Zones (FTZs) and Trade Ports (FTPs): Beijing FTZ, Tianjin FTZ, Shanghai FTZ, Fujian FTZ, Guangdong FTZ and Hainan FTP.

While reasons for the apparent stagnation of the world's second largest economy are varied, an important factor to be considered is geopolitics. As China currently maintains tense relations with several neighbouring countries, these are looking at economic cooperation as the way to boost their trade capacity and strengthen key economic sectors, with the Association of Southeast Asian Nations (ASEAN) as the most prominent example. In fact, according to the International Monetary Fund (IMF), the five largest economies in the region – Indonesia, Malaysia, Singapore, the Philippines, and Thailand – are ASEAN members and are forecasted to be the fastest growing block in the world between 2022 and 2027.

Another relevant economic bloc in the region heavily investing in its trade capacity is the Russian-led Eurasian Economic Union. Yet, the current sanctions imposed on Russia as a result of its invasion of Ukraine may affect the bloc's performance, driving some of its members towards other potential commercial partners.

Regardless of the multiple trade centres that Asia presents, the traditional East-to-West flow of cargo has changed and it's looking both eastwards and inwards, with nearly 60% of Asia's exports flow within the region.

KEY TALKING POINTS

- Maritime trade forecast for Asia and the Pacific for 2023-24
- Analysing the potential of free & special economic zones in ports and terminals to incentivize trade
- Breaking down a gigantic continent: What are current and future regional trade centres in Asia?
- Which direction are global cargo flows moving towards? What does this mean in practical terms for the port & terminals sector?
- How are regional economic blocs like ASEAN or the Eurasian Economic Union shifting paradigms for trade?
- Understanding the effect of international geopolitics on the continent's trade dynamics

SPEAKERS

PRESENTATION TITLE TO BE ANNOUNCED

Ashna Mishra, Global Lead – Shipping Strategic Engagement & Intelligence, **S&P Global Commodity Insights**

GLOBAL TRADE ON EVOLUTION AND IMPACT TO CONTAINER SHIPPING

Han Ning, Principal Consultant, **Drewry**

14:00 – 15:30

SUPPLY CHAIN MANAGEMENT & RESILIENCE

The integration of maritime transport and logistics continues to disrupt the way ports and terminals operate. From a place to load and offload cargo, industry leaders in the sector are now conceiving the port as a trade enabler and adapting their business strategy accordingly, but what does this mean?

The success of maritime and logistics integration strategies will need to factor in the geographic location of the ports, infrastructure & connectivity requirements, and even the current international geopolitical scenario. The shocks that supply chains experienced during recent events like the pandemic, the blockage of the Suez Canal, or the early stages of the Russian invasion on Ukraine have shown that a multipolar world requires a multi-stream supply network that reassures customers of the resilience of their logistics partners.

Whether caused by the establishment of regional logistics corridors, the increasing and ever-changing intra-Asian shipping lanes, or the growing need for 'friendly shoring', the competitiveness of the ports in the region will be influenced by their capability to serve as logistics hubs.

KEY TALKING POINTS

- How are supply chains evolving and what are new potential manufacturing centres?

- From near shoring to friendly shoring: Is regionalisation going to replace globalisation?
- The importance of geographic location in shipping and logistics corridors: What positions are strategic in Asia and how can ports capitalize on this to scale up trade?
- Measuring supply chain resilience: What are the indicators now and what is the role of the port?
- Transforming ports and terminals into logistics hubs
- Looking at intra-Asian shipping services: What are the implications for ports and terminals?

SPEAKERS

PRESENTATION TITLE TO BE ANNOUNCED

Aasim Siddiqui, Managing Director, **Pakistan Intermodal Ltd.**

16:00 – 17:30

INFRASTRUCTURE DEVELOPMENT & INVESTMENTS

As the port and terminals aim to capitalize on the ongoing integration between maritime transport and logistics, their infrastructure needs to adapt to an ever-changing trade and shipping landscape.

The intertwining forces of digitalisation, regionalisation, and sustainability will be key to the survival in the post-pandemic (maritime trade) environment, says Dr Than Nguyen, Lead Economist at Oxford Economics Singapore. As such, today's infrastructure development megatrends in ports and sector are switching from bigger to smarter, greener, better connected, and more resilient. The biggest port is no longer the determinant competitive factor; instead, it is being able to offer added value to customers looking to optimize their supply chain, with special focus on its ability to anticipate and adapt to major changes in the future.

Even if size is no longer determinant, the reality is space in the optimal for ports and terminals is becoming scarce. Hence, some ports have opted for gaining land to the sea to grow their cargo handling capacity; for Asian countries with restricted access to the sea, however, the pursued strategy seems to be dry-port and intermodal terminal development. Both options answer not just to the diversification of manufacturing centres in Asia but also to the growing intra-Asian trade flows.

Amidst such a promising scenario for infrastructure development in the continent, remaining challenges to be overcome are political friction within certain countries and with their neighbours, as well as taxation barriers for potential investors.

KEY TALKING POINTS

- What are the latest & most relevant infrastructure developments in the region?
- Understanding infrastructure development megatrends for ports and terminals
- Making the unpredictable predictable: How can ports and terminal direct their infrastructure investments to mitigate risks and enhance resilience?
- Can port & terminal infrastructure in Asia handle the forecasted increase in trade?
- Investing in inland dry ports and intermodal terminals in Asia: What are the challenges and opportunities?



SPEAKERS

PRESENTATION TITLE TO BE ANNOUNCED

Jeroen Overbeek, Consultant Maritime Civil Engineer & APAC Regional Manager, **Waves Group**

PRESENTATION TITLE TO BE ANNOUNCED

Jonathan Beard, Partner – Infrastructure Advisory, Strategy & Transformation Asia-Pacific Platform, **Ernst & Young**



WEDNESDAY 29TH NOVEMBER

10:00 – 11:00

REGIONAL SPOTLIGHT

Session synopsis to be released soon.

11:30 – 13:00

DIGITALISING MARITIME TRADE

The digitalisation of the sector has been an ongoing conversation for more than a decade now, but what does that mean in practical terms?

To truly capitalize on digital technologies ports and terminals need to engage with partners across their entire value chain. With the utilization of the Maritime Single Window (MSW) becoming mandatory from 1st January 2024 and the industry-wide adoption of the eBL in 2030, the terminal needs to engage with the port authority to design the actual implementation of these digital protocols bearing in mind not just the technical aspects but also those of human, legal, financial, and operational nature. From a business perspective, what are the implications of standardizing digital protocols, enabling interoperability, facilitating data exchange, and achieving digital maturity? And further to this, what are the barriers preventing effective visibility of the state of the cargo across the supply chain?

As the sector navigates through the implications of digitalisation, the recent exponential increase in Artificial Intelligence (AI) tools being used to optimize maritime trade poses a question: If the revolution of AI – or any other type of technology – keeps growing, how can the digital architecture across ports and terminals remain ready to support upcoming digital tools at a constant pace?

KEY TALKING POINTS

- What does it mean to be a smart port? What is the purpose of digital technologies?
- Is it possible to achieve visibility of the state of the cargo at each level of the supply chain?
- How can AI innovations become integrated into maritime trade?
- Standardizing digital protocols and data exchange across the supply chain
- What are the KPIs for measuring digital maturity in port ecosystems?

SPEAKERS

PRESENTATION TITLE TO BE ANNOUNCED

Budi Cahyono, Vice President Director, **Jakarta International Container Terminal (JICT)**

PRESENTATION TITLE TO BE ANNOUNCED

Indranil Sen, Industry Practice Lead – Maritime & Logistics, **NCS Group**

14:00 – 15:30

A HOLISTIC APPROACH TO ENERGY TRANSITION

With an increasing average global temperature, heat waves leading to fires and droughts, the melting of glaciers, and floodings displacing millions of people and causing billions of dollars of economic loss, the urgency for reducing carbon emissions has never been greater.

The difficulty, however, lays in designing a decarbonisation strategy with clear and measurable milestones that does not harm trade. While the latest technological advancements towards enabling the energy transition in shipping seem promising, the operational and business implications for stakeholders across maritime and logistics remain challenging. These include market-based and regulatory measures such as global carbon pricing, new ship building standards, assessment of fuel life cycles, green fuel supply development, the consolidation of green corridors, investment in R&D, and scaling up the use of port equipment running on green power.

When thinking of decarbonising shipping at a large scale, the industry – in Asia and the rest of the world – needs to incorporate a holistic approach, including the broader fuel supply chain, articulating it within the maritime trade landscape.

KEY TALKING POINTS

- Building the staircase towards Net Zero: What are the steps?
- How can the sector achieve effective carbon emission reductions without damaging trade?
- Understanding the energy transition: What are the business and operational implications for stakeholders across the supply chain?
- Articulating intra and interregional efforts to facilitate energy transition in maritime & logistics
- How can ports and terminals capitalize on the present and future landscape of green maritime fuels?

MODERATOR

Indranil Sen, Industry Practice Lead – Maritime & Logistics, **NCS Group**

SPEAKERS

PRESENTATION TITLE TO BE ANNOUNCED

Dr Prapisala Thepsithar, Director, Research & Projects, **Global Centre for Maritime Decarbonisation**