



STILL WATERS RUN DEEP

CHANGING GLOBAL SUPPLY CHAINS & EUROPEAN TRADE FLOWS

An F&L in-person meeting
22nd November 2023, Trieste, Northern Adriatic ports

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Agenda

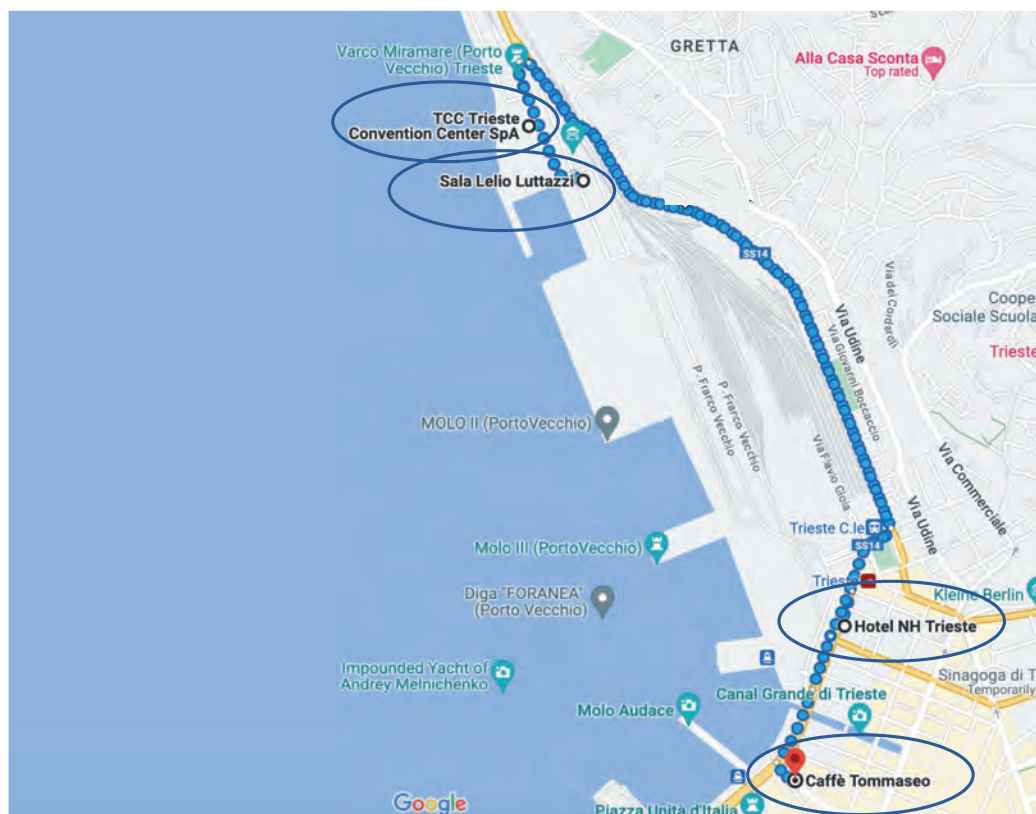
Business Leaders' Round-Table

Held at Sala Lelio Luttazzi Cultural Centre
& Trieste Convention Centre,
Northern Adriatic, Italy

22 November 2023

Still waters run deep - the freight logistics sector faces multiple pressures including cost, resilience and sustainability. *But the perception of business as usual – on the surface – is hiding dramatic activity below.* What changes are coming with geopolitical tensions, what may shifting trading patterns mean, and how can we balance risks and opportunities? We aim to bridge the geopolitical debate around global supply chains with changing trade flows through Europe, using the Northern Adriatic as a microcosm.

Altissima quaeque flumina minimo sono labi – as the Latin proverb reminds us, “the deepest rivers flow with the least sound”



AGENDA, Wednesday 22 November 2023

Background, geopolitics & defining variables

08:30– 10:40

- ❑ **Introduction & welcome**
- ❑ **Maps: what matters now?** Prof Michele Geraci & Gavin Roser
- ❑ **Geopolitical backdrop**, Prof Stefano Pilotto

Market development update and logistics performance Europe & global air & maritime, CargoON & Freightos

The economic evidence for shifting global supply chains & reflections on European movements, European Investment Bank

10:40 – 11:20

Short walk to Convention Centre & coffee

Global & local discussion on international and European trade flows

11:20 – 12:20

Global shifts – facing change & building flexibility, Rail Cargo, KPMG, Baltic Hub, K+N & audience and **global brands with local presence (Northern Adriatic)**, BAT, Mitsubishi, Baltic Rail & audience

12:20 – 13:30

Members' vote & lunch

Collaborative communication options for the future

13:30 – 15:15

Workshop briefings: two EU-backed initiatives to drive progress in the sector

Choice of workshops:

- ❑ **Collaboration and making multimodal logistics work - Connecting European digital ecosystems** (FEDeRATED)
- ❑ **Europe's connection with the world; integration of TEN-T in global supply chains** (Newopera / Planet)

15:15 – 16:00

Tea, coffee & moving back to Sala Luttazzi

Flexible mode options – reflections & lessons for us all

16:00 – 17:30

Rail, mode shift or simply mode-flexible? North Adriatic lessons for Europe? Duisport, CFL Multimodal & audience

Conclusions & country reflections Turkey, Italy, Greece, China (close 17:30)

Special networking dinner at historical Caffè Tommaseo

Piazza Nicolò Tommaseo, 4, 34122 Trieste

19:00 drinks, 20:00 dinner

(please meet us there!)

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Participation List

<i>Samskip Multimodal</i>			<i>Country Manager</i>
<i>Baltic Rail</i>			<i>CEO</i>
<i>Francesco Parisi Group</i>			<i>Special Projects</i>
<i>Alpe Adria</i>			<i>General Manager</i>
<i>Baltic Hub</i>			<i>CEO</i>
<i>Frachtbahn</i>			<i>Chairman</i>
<i>HHLA PLT Italy</i>			<i>Managing Director</i>
<i>Freightos</i>			<i>VP Market Data</i>
<i>Fercam</i>			<i>Managing Director</i>
<i>Newopera</i>			<i>Partner</i>
<i>Billiet & Co</i>			<i>Lawyer, Arbitrator & Mediator</i>
<i>Dow</i>			<i>Sourcing Manager – Road, Intermodal, Rail Europe</i>
<i>Vega International</i>			<i>CEO</i>
<i>SSI Schäfer</i>			<i>VP Global Technology</i>
<i>Fining</i>			<i>Director</i>
<i>Fercam</i>			<i>Head of Marketing</i>

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<i>Raillogix</i>			<i>Manager Sales</i>
<i>O-I Europe</i>			<i>EU Sourcing Manager Logistics – Europe</i>
<i>4FOLD Containers</i>			<i>Founder</i>
<i>Vega International</i>			<i>r2L Germany</i>
<i>Electrolux</i>			<i>Logistics Purchasing Director – BA Europe</i>
<i>CargoON</i>			<i>Country Manager Italy</i>
<i>Mitsubishi Electric Europe</i>			<i>Logistic Manager & BEMR</i>
<i>Newopera</i>			<i>President</i>
<i>ÖBB Rail Cargo Group</i>			<i>Managing Director Italy</i>
<i>GBT Rail</i>			<i>Managing Director</i>
<i>LKW WALTER</i>			<i>Director</i>
<i>Julius & Clark</i>			<i>Founder & CEO</i>
<i>Trieste Port</i>			<i>Project Manager</i>
<i>Illy</i>			<i>Supply Chain Analyst & PM</i>
<i>ADSP Mare Adriatico Orientale (Eastern Adriatic Sea) / ESPO European Sea Ports Organisation</i>			<i>President / President</i>
<i>Blume Global</i>			<i>AVP Business Product Development Europe</i>

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<i>Francesco Parisi Group</i>			<i>Director Intermodal</i>
<i>CargoON</i>			<i>Business Development Manager</i>
<i>Duisport-Duisburger Hafen</i>			<i>Project Manager Trieste</i>
<i>BAT British American Tobacco</i>			<i>Procurement Sourcing Manager Trieste Innovation Hub</i>
<i>North Sea Port</i>			<i>Advisor Energy Transition & European Affairs</i>
<i>HaCon Ingenieurgesellschaft / EU Rail / Newopera AISBL / ALICE</i>			<i>Executive Director / Head of Logistics, R&D / Board Member</i>
<i>ALIS (Italy's sustainable intermodal logistics association)</i>			<i>VP & General Director</i>
<i>Cosco Italy</i>			<i>General Manager</i>
<i>Heriot-Watt University, Edinburgh</i>			<i>International Business Management, F&L Intern</i>
<i>Adria Port</i>			<i>Business Development Manager</i>
<i>F&L</i>			<i>Secretary General</i>
<i>ECS European Container</i>			<i>Regional Sales & Account Manager Italy</i>
<i>Newopera</i>			<i>Chairman</i>
<i>Wärtsilä</i>			<i>General Manager Integrated Systems & Solutions</i>

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<i>Ministry of Economic Development – Republic of Italy / Nottingham University Ningbo / Peking University / New York University Shanghai</i>			<i>Former Undersecretary of State / Prof of Practice Economic Policy / Hon Prof / Adjunct Prof Finance</i>
<i>Sisam</i>			<i>Business Development Manager</i>
<i>Zunarelli - Studio Legale Associato</i>			<i>Senior Partner</i>
<i>Samer & Co Shipping</i>			<i>Corporate Development Manager</i>
<i>Francesco Parisi Group</i>			<i>Trieste & Venice Branch Manager</i>
<i>duisport Agency / Interporto Trieste</i>			<i>Managing Director / Board</i>
<i>INEOS Styrolution Europe</i>			<i>Head of SCM Execution</i>
<i>Seerefine</i>			<i>Partner</i>
<i>Smart Join Logistik</i>			<i>Managing Director</i>
<i>Ventura</i>			<i>Director</i>
<i>Yload</i>			<i>CEO & Founder</i>
<i>Port of Barcelona</i>			<i>Commercial Technician</i>
<i>Seerefine</i>			<i>Founder & CEO</i>
<i>Plymouth University</i>			<i>Assistant Professor of Shipping & International Logistics</i>

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<i>TimIntralog</i>			<i>Managing Founder</i>
<i>Rhenus Group</i>			<i>CCO</i>
<i>F&L</i>			<i>Director</i>
<i>Samskip Multimodal</i>			<i>Director Rail</i>
<i>Newopera</i>			<i>Treasurer</i>
<i>Rail Development</i>			<i>President</i>
<i>Vega International</i>			<i>r2L Scandinavia</i>
<i>Vega International</i>			<i>r2L Scandinavia</i>
<i>ÖBB Rail Cargo Group</i>			<i>Corporate Development & Strategy</i>
<i>CFL Multimodal</i>			<i>Commercial Director</i>
<i>Sisam</i>			<i>Project Cargo Division</i>
<i>F&L</i>			<i>Head of Secretariat</i>
<i>KBX Logistics</i>			<i>Senior Transportation Manager Europe</i>
<i>Illy</i>			<i>Director Logistics</i>
<i>Dow Inc</i>			<i>Sourcing Manager – International Trade Europe</i>
<i>EIB European Investment Bank</i>			<i>Head Economic Studies Division Economics</i>

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<i>Ponera Group</i>			<i>Head of Sales and Business Development</i>
<i>Berger Logistik</i>			<i>Intermodal</i>
<i>Greenlog Intermodal Logistics</i>			<i>Managing Partner</i>
<i>Log4Chem / EDL Group Europe</i>			<i>Managing Director</i>
<i>Berger Logistik</i>			<i>Business Unit Manager - Transport Management</i>
<i>Guangzhou Port (Europe)</i>			<i>CEO</i>
<i>Port Authority Eastern Med Sea (Trieste & Monfalcone)</i>			<i>Head Strategic Development & Special Projects Coordinator</i>
<i>Stora Enso</i>			<i>Port Procurement Manager</i>
<i>Ponera Group</i>			<i>Key Account Manager</i>
<i>VTG Rail Europe</i>			<i>Managing Director (Intermodal)</i>
<i>GATX Rail France</i>			<i>Sales & Technical Consultant</i>
<i>Barilla</i>			<i>International & Overseas Transport Senior Manager</i>
<i>Sony</i>			<i>VP Supply Chain</i>
<i>Francesco Parisi Group</i>			<i>President & Managing Director</i>
<i>Francesco Parisi Group</i>			<i>Director</i>

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<i>Zunarelli - Studio Legale Associato</i>			<i>Partner</i>
<i>Vega International</i>			<i>r2L Co-ordinator</i>
<i>Port of Calais</i>			<i>Head of Strategy and Development</i>
<i>HHLA PLT Italy</i>			<i>Commercial and Sales Manager</i>
<i>Codognotto / ALOT</i>			<i>Consultant FEDeRATED / CEO</i>
<i>MIB School of Management</i>			<i>Professor</i>
<i>Fercam</i>			<i>Sales Director Europe</i>
<i>LKW WALTER</i>			<i>Director Sales</i>
<i>Codognotto Italia</i>			<i>Director Key Accounts Europe</i>
<i>Heriot-Watt University, Edinburgh</i>			<i>International Business Management, F&L Intern</i>
<i>Logex</i>			<i>Director</i>
<i>Fero.AI</i>			<i>VP Europe</i>
<i>Kühne + Nagel Estonia</i>			<i>Managing Director</i>
<i>F&L</i>			<i>Ambassador-At-Large</i>
<i>Gruppo Pittini</i>			<i>Head of Group Logistics</i>

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<i>Russell Group</i>			<i>Commercial Director</i>
<i>Vega Italy</i>			<i>CEO</i>
<i>Port of Barcelona</i>			<i>BCOs & Reefer Manager, Commercial</i>
<i>Samer & Co Shipping</i>			<i>President & CEO</i>
<i>Transporeon / ALICE</i>			<i>Head of Ecosystem / Vice Chair</i>
<i>Vega International</i>			<i>r2L Switzerland</i>
<i>UIRR</i>			<i>President</i>
<i>Quehenberger Logistics GmbH</i>			<i>Business Development Key Account Manager</i>
<i>Invista</i>			<i>Business Operations Specialist</i>
<i>HHLA TK Estonia</i>			<i>CEO</i>
<i>Alpe Adria</i>			<i>Key Accounts & Business Development</i>
<i>IPCSA Port System Authority of the Eastern Adriatic Sea</i>			<i>Secretary General</i>
<i>Newopera</i>			<i>Vice Chairman</i>
<i>FEDeRATED</i>			<i>Coordinator EU CEF FEDeRATED Project</i>
<i>Rail Force 1</i>			<i>Commercial Director</i>
<i>Move Intermodal</i>			<i>Commercial Director</i>

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<i>Autamarocchi Group</i>			<i>General Manager</i>
<i>Ro.Ro. Tranship</i>			<i>CEO</i>
<i>VOS Logistics</i>			<i>Business Development Manager Europe</i>
<i>KPMG</i>			<i>Global Head of Transport & Leisure</i>
<i>Invista</i>			<i>Director, Europe Business Operations</i>
<i>Shipsta</i>			<i>Founder & CRO</i>
<i>BAT British American Tobacco</i>			<i>Operations Director Italy & Adria</i>
<i>Beiersdorf</i>			<i>Senior Global Category Manager</i>
<i>Freightos</i>			<i>Director Sales</i>



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FERCAM, a family-owned company based in Bolzano, generated a turnover of 1.128 billion euros in 2022. This South Tyrolean transport and logistics company is present in 21 Countries with more than 100 Subsidiaries and an extensive network of correspondents worldwide. FERCAM offers specialized services in various sectors of transport and logistics:



FERCAM Transport for road and rail transport, **FERCAM Air & Ocean** for air and sea transport in import and export with its own Customs offices, **FERCAM Special Services** for art logistics, trade fair logistics, as well as moving and relocation services, as well as document management and archiving services. The **Distribution and Logistics divisions** will be managed in the future by the joint venture with Dachser, **Dachser & FERCAM Italia S.r.l.**



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time to shift



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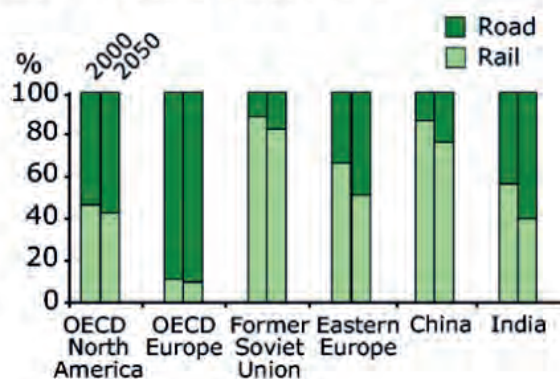
The r2L connector is the game changer for freight logistics with regard to the required modal split pro railways.

Europe's infrastructural conditions are lagging behind the future EU policy scenarios. The r2L connector solution is precisely adapted to today's existing infrastructure. This allows you to start the transition to a CO2-free future for your logistics company at any time, no matter what structure you are currently using.

It is time to change and it is our mission to support all those who want to change now. We are eager to answer your individual questions about your future of CO2 free logistics.

Let's tackle it together!

**Freight transport modal split in 2000
and projected split in 2050**



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NEWOPERA is an international non-profit engaged on research & demonstration activities focused on rail freight intermodality innovation, transport mobility optimization, hard/soft technology evolution, co-modal solutions, energy saving and environment friendly processes. Research activities are carried out in the marketplace, published and disseminated. Important achievements include:



1. Contribution to the conception of the **TEN-T network** starting from the “Freight Freeways” to the Newopera project at the beginning of this century, constituting the foundations of the TEN-T network origin.
2. **Tiger & Tiger Demo** promoted transport industrialisation through hinterland rail distribution to/from sea ports and inland terminals/hubs/nodes giving substance to “Dry Ports” connections at scale. Tests on Betuwe line & results in EU Ports RTD, Hamburg, Genoa when giant container vessels were not in operation.
3. Focus moved to creating additional capacity on rail to avoid massive infrastructure investments when capacity needs were immediate. C4R, Wivas, Innowag, Optiyard, Ter4Rail were part of this effort involving innovative hard & soft technologies and intelligent systems applied to rail infrastructures, trains, wagons, marshalling yards, terminals, inner port sidings for increasing productivity with track and trace functionalities.
4. **Marathon & M20** introduced into existing rail networks the 1500m long train pulled by 2 locos with distributed traction, tested with electric & diesel locos. Both trains with second slave locos unmanned in the middle of the convoy piloted by antennas & computerized systems, pulled 72 wagons, 216 TEUs, 4026 Tons with 1524m length. This opened a huge window for achieving much greater capacity & productivity on existing lines. Today 750m train length is a standard, and in many countries 1000m is now common.
5. **Spider Plus** project when it was apparent “Just in time” no longer responded to logistics needs. Combining SPACE with TIME introduced new available technologies allowing more effective use of resources. This project (2013) launching logistics vision 2050 with an intermediate step in 2030, forced EU Authorities to plan and visualize future cargo and passenger mobility challenges, led to various Horizon 2050 programs.
6. **Planet** built around EGTN concept (European Green Transport Network). The “green” element was introduced through research involving IOT, disruptive technologies, AI, machine learning, blockchain, big data, synchro modality, hyperloop all providing functionality for saving time, money, resources and delivering better service. Some aspects of Planet are being discussed and challenged in two separate workshops in Trieste this November 22nd. If a simple solution existed, it would have been already invented.



Franco Castagnetti
Former Director Procurement
SCM Polimeri Europa (ENI),
Founder F&L, VP Newopera



Dr Horst Kubek
Former Board member LKW
Walter, Founder F&L, Treasurer
Newopera



Emilio Fernández
Chairman Newopera,
former President Transfesa



Lars Deiterding
Exec Director Hacon, Head
Logistics and R&D
EU-Rail, Board member ALICE &
Newopera



Armand Toubol
Vice-Chair Newopera, lecturer La
Sorbonne Uni & others, member
DTLF, former GM, Exec Board SNCF,
former CEO SNCF Participations



Silvio Becca
Freelance consultant & Partner
Newopera, former
Assoc Partner Accenture &
Kearney Principal

Notes



Notes



F&L is a network of senior business leaders focused on freight logistics across the supply chain and operating in all sectors and transport modes, based across Europe and globally. F&L is an independent, not-for-profit and non-lobby organisation working to spread best practice and mutually beneficial collaboration to optimise efficiency, sustainability, and economic viability.

Participating individuals and companies benefit from unique access to peer group discussions with an experienced senior network, talking in confidence to drive effective strategic engagement and change.



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