

2012 New Zealand

Freight Summit

Current supply: Future demand: Bringing efficiency and collaboration to the New Zealand freight sector

15-16 February 2012

The University of Auckland, Business School, Auckland

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Exciting case studies on offer:

- Hear from Chris Greenough the CEO of Kotahi
- Key addresses from The Productivity Commission and The Infrastructure Unit, The Treasury
- User perspective panel - exporter and importer challenges – Brian Broom, DHL Global Forwarding, Paul Bradburn, Mitre 10, Mike Knowles, Zespri
- Listen to David Warburton, CEO Auckland Transport discussing the impact of Auckland Transport Plan on urban freight efficiency
- Murray Sherwin, Chair Productivity Commission
- Hear from top CEOs from different freight modes about the challenges they face and their solutions to overcome these

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2012 New Zealand Freight Summit



DAY 1: 15 February 2012

8.30 Registration and coffee

9.00 Opening remarks from the Chair

Professor Tava Olsen, *Ports of Auckland Chair in Logistics and Supply Chain Management*,
Academic Director, Centre for Supply Chain Management,
The University of Auckland Business School

The New Zealand freight challenges

9.10 Ministerial Address: Freight of the nation

Efficient movement of freight into, out of, and across New Zealand, is of critical importance to economic performance. Our transport infrastructure supports the movement of exports from production, to port and then to market.

- What does future freight demand look like – and how does the current rate of investment in infrastructure align?
- Sustainability of the New Zealand Freight sector
- The Government's stance on port challenges

Please note: Due to the timing of this year's Conference the Minister will be confirmed post election

"New Zealand is the most remote developed country in the world relative to international markets. Export earnings are extremely important to New Zealand, last year the collective return was over \$40 billion."

9.50 The Productivity Commission inquiry into international freight transport services: draft findings and insights

New Zealand is the most remote developed country in the world and the way we get our products to and from international markets is critical to our success. New Zealand exporters and importers currently spend about \$5 billion on freight each year. The Commission has been looking at whether these costs can be lowered and services improved. Better performance in freight transport could result in lower prices for imported goods, higher profits and wages in exporting industries, and quicker freight turnaround. The Commission's draft report and recommendations for freight services will be released in late 2011. The issues it covers include:

- Factors influencing the accessibility and efficiency of international freight services available to New Zealanders
- Opportunities to increase the accessibility and efficiency of international freight transport services; including ownership models
- The effectiveness of current regulatory regimes and the potential costs and benefits of alternatives
- Changes to drive improvements in infrastructure investment, innovation and supply-chain coordination.

Murray Sherwin, *Chair, Productivity Commission*

10.30 National Infrastructure Plan perspective on freight challenges

The second National Infrastructure Plan, which was released in July 2012, highlighted some of the key issues New Zealand has with freight movement. Most freight in New Zealand is moved by road, while coastal shipping and rail provide alternative networks and most external freight is shipped. The Plan identifies more efficient freight supply chains as a key measure of success and considers the impact of land use decisions on the transport network.

- The investment in transport infrastructure to support our export market
 - Plans around the golden triangle; dealing with the infrastructure implications of significant population growth
 - Transport and rail links and the resilience of our infrastructure
 - Supporting growth in Auckland
- Brian Hallinan**, *Team Leader, National Infrastructure Unit, The Treasury*

11.10 Morning tea

11.30 The question of bigger ships

The efficiency, reliability and cost effectiveness of our international supply chains are particularly important for an island nation such as New Zealand. We are geographically distant from trading partners and our economic prosperity is highly dependent on the performance of our exporting sectors. New Zealand export trade is already being impacted by the consolidation of global shipping lines. If ports are not bigger ships capable within the next five years there will be serious consequences to the efficiency of our supply chains.

- The significant net supply chain benefits
- Lyttelton and Tauranga focus on handling 5000-7000 TEU services
- Key benefits of accommodating larger ships in New Zealand
- Government's legislative responsibility

Greg Steed, *Chairman, New Zealand Shippers Council*

12.15 Coastal Shipping: New Zealand challenges

Coastal shipping in New Zealand has been somewhat dominated by international shipping companies carrying domestic cargo. These international vessels often run on their own time schedule, where the local needs are not taken into consideration. In many parts of New Zealand coastal shipping also play a role in security and civil defence when it comes to dealing with natural disasters.

- New Zealand ports providing main emergency logistic links for relief supplies when coping with natural disaster.
- The important role coastal shipping plays in the New Zealand freight sector
- How can organisations further maximise coastal shipping

Steve Chapman, *CEO, Pacifica Shipping*

1.00 Lunch

Collaboration in the New Zealand supply chain

1.50 User perspective panel:

New Zealand exporter and importer challenges

Supply chain management from a New Zealand perspective comes with some challenges. Not only is New Zealand currently facing a weak US dollar which is painful for our exporters but also the year on year issue of lack of enough ships in our ports during peak season. There is no policy to change this scenario for New Zealand exporters nor has there been any adjustment from the large international shipping companies during our peak season.

- What role can New Zealand ports play to encourage more ships to our ports?
- What strategies can the shipping companies employ to alleviate this problem?

Mike Knowles, *Shipping Manager, Zespri International*
Brian Broom, *Managing Director, DHL Global Forwarding*
Paul Bradburn, *Supply Chain Manager, Mitre 10*



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2.50 Case Study: Re-thinking the supply chain: Kotahi

By Fonterra and Silver Fern Farms partnering to form a new freight management company there is potential for it to ultimately become a transparent market driven exchange for freight. On the other side of the idea behind Kotahi; the ability to consolidate and broker in an efficient manner could potentially be a market making mechanism for domestic freight.

- Freight management innovation to create efficiencies in freight supply chains
 - Coordinating freight needs to match seasonal fluctuations
 - Integration of the entire supply chain
 - What Kotahi could mean for the New Zealand freight industry
- Chris Greenough, CEO, Kotahi**

3.35 Afternoon tea

Urban planning for greater freight efficiency

3.50 The impact the Auckland Transport Plan could have on freight efficiency

Auckland Airport, Ports of Auckland, the region's motorway and arterial road, rail and public transport networks constitute a multi-modal transport system for effective movement of goods, services and people. Better integration of land use, transport planning and urban design all leads towards greater efficiency in the freight sector. Currently more than \$33 billion of goods are carried annually on roads within the Auckland region. With freight movement expected to double in number over the next 25 years, what is Auckland doing to offset the over crowding of road and rail systems that restrict freight movements?

- Managing the use of the road networks as primary movers of freight
- Reducing journey times for movements of freight – exports to key port hubs both airport and sea hubs
- Linkage of national routes to local routes ensuring high level connectivity and access to markets.

Dr. David Warburton, CEO, Auckland Transport

4.35 Improving productivity, sustainability and safety with telematics and real time traffic

Ten years ago the time cost of traffic congestion in Auckland alone was estimated at around 1 billion dollars a year. It hasn't improved, but technology and data collection has. Fleet Management solutions have become more sophisticated and most of New Zealand roads have been remapped to sub 1 metre accuracy. Real time traffic congestion and incident data is now available for all major and most arterial roads throughout New Zealand (and Australia) and historic data is now available for those same roads going back to April 2010. Mapping, Fleet Management and Car Navigation companies are now developing new solutions using this data including:

- Eco-routing based on road inclinometer and implicit turn restrictions
 - Driver safety alerts where the camber of a corner has degraded and is not consistent with the current signage and the truck may therefore be going too fast for the conditions
 - Route optimisation solutions that take real time traffic into consideration
 - Long haul trip planning based on historic traffic conditions
 - Spatial business analytics without the need for a GIS system
- Luigi Cappel, Sales & Marketing Manager, GeoSmart**

5.10 End of day one closing remarks from the Chair

5.15 New Zealand Freight Summit Networking Drinks

DAY 2: 16 February 2012

9.00 Welcome back from the Chair

Professor Tava Olsen, Ports of Auckland Chair in Logistics and Supply Chain Management, Academic Director, Centre for Supply Chain Management The University of Auckland Business School

The New Zealand Freight Sector in the 21st Century

9.05 The New Zealand maritime and ports sector in the 21st century

The maritime and ports sector occupies a central role in the New Zealand freight and transport industry. The role of organised labour continues to play a major role in this industry on the domestic and international scene. Some of the issues facing the industry with wider economic, social and political implications include:

- Ownership and rationalisation of ports – for whose benefit?
 - Rebuilding coastal shipping
 - The role of Government in successful national transport planning
 - Productivity issues from the worker's perspective
- Joe Fleetwod, General Secretary, Maritime Union**

9.50 Applying Best Practice US Freight Planning to New Zealand

In June 2011 the United States Department of Transportation Federal Highway Administration released a template for States to prepare a multi-modal freight plan. In this presentation we look at the components of best practice freight planning and examine the implications for freight planning in New Zealand:

- Freight Characteristics
- Mode and Infrastructure Profiles
- Safety, Security, Congestion, Land Use and Environmental Considerations
- Performance Measures and Planning.

Matthew Ensor, General Manager Transportation, Beca

10.30 Morning tea

10.45 Road vs rail

New Zealand freight is dominated by road transport with around 80% of our freight being transported in this way. What is the reality today in the comparison between road and rail? Trucking is able to respond to a change in demand very quickly, but what are the options for rail?

- Reducing transport times to boost trade
- Road vs rail efficiency
- Rail in the remoter regions; accessibility and speed into remoter regions
- Costs and investments in road vs rail
- Interchange between the two modes

Peter Morris, Manager Logistics, Strategy Supply Chain, Fronterra

11.25 Case study: Technological advances that impact on dependency on heavy transport

Companies can use technology to be smarter about freight and reduce volumes. These savings comes from better use of technology, IT, information. And from product innovations that reduce product size and weight.

- Technology can be used to reduce dependence on transport while maintaining productivity and growing the country's economy.
- Technological advances are impacting supply chain management and costs

Vijay Todkar, Business Development Manager, GS1

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12.10 Lunch

CEO Perspectives

1.10 CEO Perspective: Road transportation

The capacity of New Zealand's roading network is unlikely to keep pace with the current rate of overall traffic growth, especially in large urban areas. This would mean that the growth of road freight transport might be constrained by congestion in some urban areas in the future. The current trend for transport to and from increasingly large distribution centres may mean further increased transport growth in the future.

- Usage of large trucks to increase productivity of vehicles
- Key areas/regions and growth industries the road sector supports
- Meeting future demand

Ken Shirley, *CEO, Road Transport Forum*

1.35 CEO perspective: Rail freight

Rail freight increased from about 150,000 tonne to 320,000 tonne in Southland in the past 12 months because of the boost in rail use from dairy, timber and coal sectors. This increase in usage brings with it a strain on the current infrastructure that is in place.

- An update on the KiwiRail Turn Around Plan
- Current and future Infrastructural upgrades and investment
- Future demand on rail freight

Iain Hill, *General Manager, Freight, KiwiRail*

2.00 CEO perspective: Airfreight

Airfreight's role in the domestic and international supply chain has been shifting in the past few years. There are questions surrounding sustainability as well as environmental concerns.

- What does the future hold for airfreight in New Zealand on both a domestic and international scale
- The impact of the regulatory environment

Irene King, *CEO, Aviation Industry Association*

2.25 CEO perspective: Shipping

As shipping companies are trying to become more profitable, particularly after the financial crisis we have seen far less shipping services out of New Zealand. Vessels also tend to run at slower speeds as shippers try to save on fuel.

- Coping with less shipping services: can we change the expensive cost structure we currently have?
- Gaining even freight volumes and presenting large enough quantities in some ports to encourage bigger ships into New Zealand
- Port ownership – what's the right mix of ownership?
- New Zealand's vulnerability to changes in shipping patterns
- The mix of coastal shipping versus deep water; what impacts will this have in the future on our total number of ports?

John Robinson, *President, Shipping New Zealand & Chairman, Wallenius Wilhelmsen Logistics New Zealand and Wilhelmsens Ships Service*

2.50 Afternoon tea

3.10 CEO multi-modal Panel with Q & A: Freight New Zealand

Greater integration and communication between the different freight modes can only bring about greater efficiency in the marketplace. How do these speakers see the future of freight developing in New Zealand? We encourage questions from the floor as we bring all our CEOs together to close the conference.

Ken Shirley, *CEO, Road Transport Forum*

Irene King, *CEO, Aviation Industry Association*

Iain Hill, *General Manager, Freight, KiwiRail*

John Robinson, *President, Shipping New Zealand & Chairman, Wallenius Wilhelmsen Logistics New Zealand and Wilhelmsens Ships Service*

4.00 Closing remarks from the Chair and end of conference

Featured Speakers



Brian Hallinan,
*Team Leader,
National Infrastructure Unit,
The Treasury*



Brian Broom,
*Managing Director,
DHL Global Forwarding*



Dr. David Warburton,
*CEO,
Auckland Transport*



Luigi Cappel,
*Sales & Marketing Manager,
GeoSmart*



Matthew Ensor,
*General Manager Transportation,
Beca*



Mike Knowles,
*Shipping Manager,
Zespri International*



Murray Sherwin,
*Chair,
Productivity Commission,
The Treasury*



Greg Steed,
*Chairman,
New Zealand Shippers Council*



Professor Tava Olsen,
*Ports of Auckland Chair in
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A Word from the Conference Chair

Supply chain performance is a key input to New Zealand productivity. In the words of one of the senior supply chain executives in our network:

"If New Zealand doesn't have a good supply chain, we're stuffed."

Therefore, the international competitiveness and profitability of New Zealand's national and international freight and logistics services are critical to New Zealand's economic health.

In terms of supply chain costs and efficiency, New Zealand needs to be better than the rest in order to compete globally. Fierce local competition and efficient low cost operations are important essential elements of a healthy freight sector. But they're not the only answer.

Infrastructure and policy decisions have a massive impact. So too do attitudes of players within the supply chain, cooperation, innovation and information-sharing can often "grow the pie", reducing costs and risks (and increasing margins) for everyone.

The Centre for Supply Chain Management (CSCM) is a multi-disciplinary research and education centre, founded in 2007 within The University of Auckland Business School. Our mission is to develop and disseminate world-class knowledge and practices in supply chain management applicable to New Zealand organisations by fostering cooperation, collaboration and communication among academics and industry practitioners.

For that reason, we are proud to co-host and support the 2012 New Zealand Freight Summit in partnership with Conferenz. We believe that a forum for discussing the key issues affecting the Freight of the Nation is essential.

We hope you will join us to hear and debate the insights of the Productivity Commission, National Infrastructure Unit, and senior shipping, road, rail and aviation CEOs regarding what the future efficiency of New Zealand's freight sector will look like – and what it will take to get there.

I look forward to meeting you in February.

Professor Tava Olsen, *Ports of Auckland Chair in Logistics and Supply Chain Management*,
Academic Director, Centre for Supply Chain Management
The University of Auckland Business School

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