

## Alaska Seafood demand to North Asia

By Robert L. Wallace, AJOT

Bering Sea Opilio snow crab catch reports of January show harvesting season well under way and within Total Allowable Catch of 66 million pounds. Alaska seafood producers are landing vessels at Unalaska, Dutch Harbor with higher value seafood destined for Sendai, Qingdao and Pusan ports. North Asia seafood consumers and processors are recognizing the value of the numerous fresh and frozen species of Pacific salmon, pollock, cod and crab from Alaska fisheries of the Bering Sea, Aleutian chain and the Gulf.

The Last Frontier's icy waters transform the largest state in the union into a seafood lover's paradise to produce over fifty percent of the United States' seafood. The abundant and sustainable annual harvests of salmon, whitefish and shellfish species are renowned for "superior flavor and healthy for low in saturated fats and high in good fats: heart healthy omega-3s," according to the Alaska Seafood Marketing Institute (ASMI). Alaska is the only state that wrote conservation laws into its Constitution. For any seafood species, once the quota is reached, then the season is closed.

Seafood is the leading export of Alaska. In 2010, total exports amounted to \$4.2 billion of which seafood accounted for 44 percent of the total for \$1.8 billion followed by mineral ores with 32 percent and energy with 10 percent. Japan, China and South Korea are the top export markets.

Dutch Harbor, Unalaska is situated on the southwestern most of the Aleutian chain between the Bering Sea and the Gulf of Alaska and a main international seafood port. Export services are provided for producers in a very competitive seafood system. Harvested seafood is mostly shipped frozen to Japan, China and South Korea from frozen seafood handling facilities in Dutch Harbor direct to those markets by APL, Maersk or Horizon Lines. Logistics service providers also arrange transshipments from Dutch Harbor vessel landings across the 2,048 nautical miles of the Gulf to Seattle, Washington for further processing, then to Sendai, Qingdao and Pusan ports.

Trawlers, longlines, and shell fish pot vessels are "little fish factories," stated one transshipment service provider. Crab and salmon are hand stowed onto vessels bound for Seattle because they do not cube out. However, pollock is denser and the fishermen on their boats at sea "cut the pollock, process, place into 15 pound sleeves, package three sleeves into corrugated cases of 52 pounds each and place 60 cases on a pallet for loading into 40 foot refrigerated export containers.

Exports to Japan and Korea are large quantities of frozen Alaska pollock. Alaska pollock surimi exported to Japan from January through November, 2012 amounted to over 60 million kilos and for \$141,986,075 in value of a total Alaska seafood export of \$425,912,519. South Korea exports of Alaska Pol-

lock surimi was over 43 million kilos for \$140,961,425 in value of a total export of \$331,058,634, according to the National Oceanic and Atmospheric Administration, Marine Fisheries Service. In Japan, surimi is processed further to make Kamaboko, a paste to be molded into loaves or artistic patterns, but not for sushi. In the U.S.A., Alaska pollock (whitefish) are found in popular branded products such as McDonald's Filet-O-Fish and in supermarkets for imitation crab packaged products.

Japan and Korea processing factories import Alaska seafood to China for the low wage labor and market opportunities. However, the processing industry in China is suffering because of lower sales to the European Union (EU), Japan and the U.S., higher labor costs and an appreciating Chinese Yuan, as well as Chinese import restrictions, according to an Alaska seafood freight forwarder. In the first three quarters of 2012, China processed and re-exported 821,800 tons of seafood worth \$3.85 billion, a 9 percent drop in value from 2011. Shandong province (Qingdao port), Fujian and Guangdong are the top three in order of volume and value for all of mainland China's fish and seafood exports, according to the Ministry of Agriculture, China in a December, 2012 report from the United States Department of Agriculture, Foreign Agriculture Service, Global Agriculture Information Network (GAIN).

The domestic consumer market in China is also an opportunity for Alaska seafood exporters. "Growing domestic incomes and changing lifestyles of average consumers is fueling demand (DEMAND – continued on page 11)



Moroccan clementines scanned at the Port of Wilmington, Delaware's refrigerated warehouse. (Photo: Vered Nohi-Becker/Port of Wilmington, DE)

## Port of Wilmington, Delaware is top banana for perishables

By Karen E. Thuermer, AJOT

Competition is heightening among those involved in perishables and the cold chain trade. While seaports worldwide are vying for their share of the business, some seaports operate the business like a fine oiled machine. One such port is the Port of Wilmington in Delaware. Perhaps that's why Wilmington has retained its status as North America's No. 1 seaport for imported perishables, largest U.S. seaport for bananas (second in the world) and the nation's leading port for fruit concentrates.

In comparing Calendar Year 2012 to 2011, port officials state that all categories have shown growth year-over-year. Thomas Keefer, Deputy Executive Director of Diamond State Port Corporation (DSPC), which owns and operates the deepwater port, attributes these increases to good weather for growers and modestly improving economy where people have more disposal income to purchase fresh fruit.

The fact that ships for companies like Chiquita Fresh North America, Dole Fresh Fruit Company and others call the port for their perishables busi-

ness is testament to Wilmington's customer service, operations, facilities and skilled labor. Dole may maintain facilities at four other North American ports, but its Wilmington operation is more than double the size of its others.

Chiquita, itself, is growing its own business by introducing larger containerships on the service to Wilmington from Central America. Ships operated by both Dole and Chiquita arrive the port weekly. The only other port-of-call they make on the East Coast northbound is Port Everglades.

"After they leave us, they go back down to Central America," Keefer states.

On the backhaul, the ships carry export items such as kraft linerboard used for making boxes, an assortment of general cargo, even used automobiles are shipped southbound.

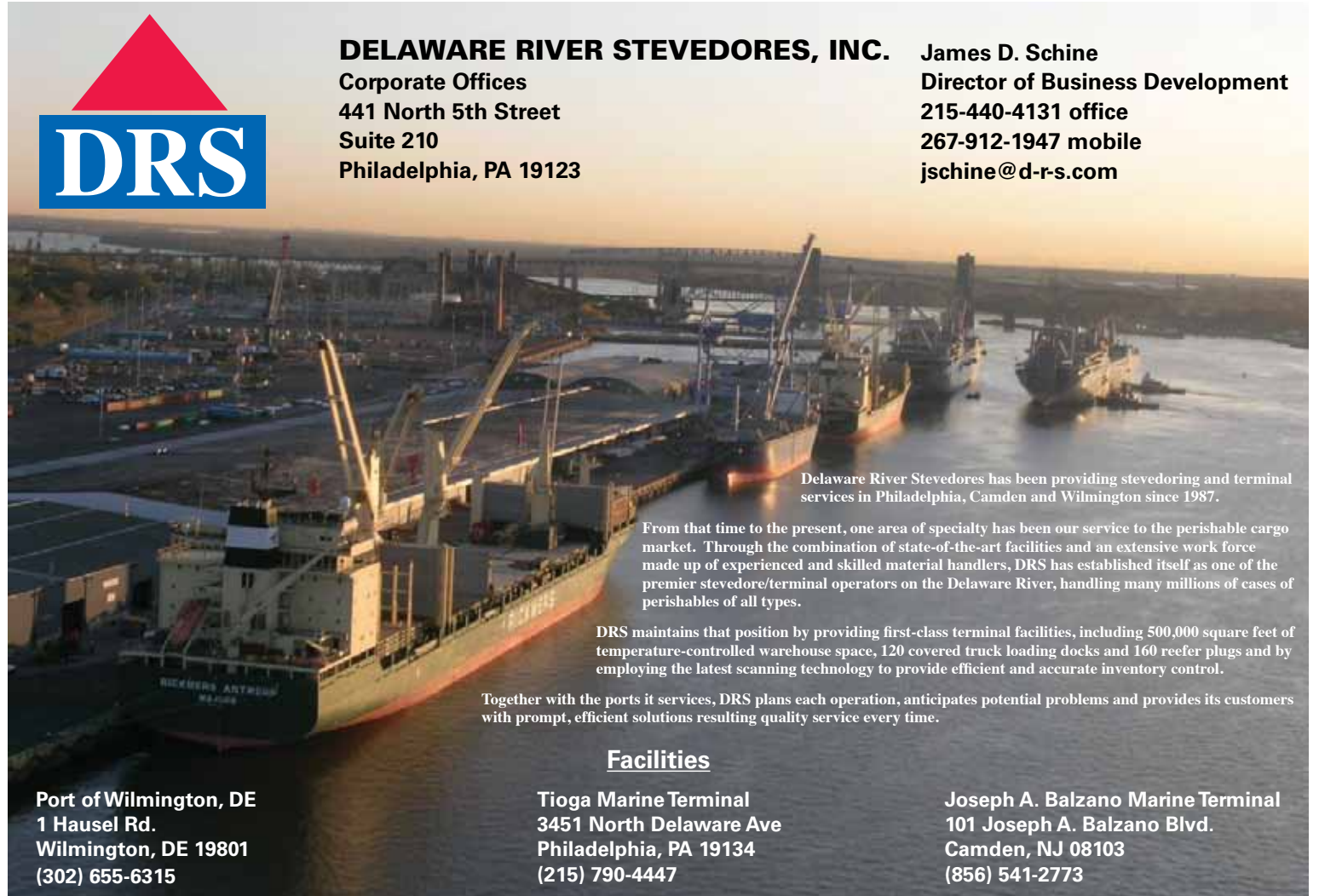
"We work closely with Dole and Chiquita to provide labor in support of their warehouse requirements," Keefer explains. "Our role is to partner with them to create a favorable and competitive (TOP – continued on page 4)



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Chilean fruit discharged at the Port of Wilmington, Delaware.  
(Photo: Vered Nohi-Becker/Port of Wilmington, DE)

(TOP – continued from page 2) operational environment that enables these world-class companies to grow their north and southbound business.

Both companies lease land at the port on which they operate their own terminals. All totaled, the business encompasses some 1.5 million tons of containerized perishables.

#### BREAKBULK BUSINESS

The port also handles a great deal of breakbulk perishables. This includes grapes and stone fruit from Chile, apples and pears from Argentina, and Clementines from Morocco. Wilmington also handles juice concentrates on an ongoing basis. These come primarily from Brazil and Argentina, but also Costa Rica and Belize.

Citrosuco North America (CNA), part of the Fisher Group based in Brazil, is a long-time port tenant that operates a fleet of four specialized tanker vessels that call Wilmington to discharge orange juice and other juices. Citrosuco, which merged with Citrovia recently, is the largest producer of orange juice in the world.

The company, built North America's largest refrigerated bulk juice storage terminal at the Port. This bulk juice terminal allows CNA to store orange juice in concentrated form as well as a fresh form known in the trade as "not from concentrate" (NFC). "When the product arrives it is discharged into their terminal state of the art storage tanks where it is stored, blended and then loaded in food grade stainless steel tank trucks," Keefer explains.

Citrosuco, which operates its main orange juice terminal in Santos, Brazil, and other terminals in Ghent, Belgium, and Toyohashi, Japan, has been a tenant at the Port of Wilmington for 25 years. Some four years ago the company expanded its terminal in Wilmington so that it could receive fresh orange juice.

Pears, apples and juice concentrate from Argentina also represent a big breakbulk program at the seaport.

"We've been handling the juice concentrate at the port for over 25 years," says Keefer. "We are into our third season with fresh pears and apples."

The port's Chilean fruit program, on the other hand, arrives on ships as a combination of palletized and containerized freight.

While the business is good, last year the port received fewer

some of Seatrade's largest specialized reefer ships to deliver about the same volume of fruit as in the 2010-2011, reports Port Illustrated, the port's newsletter.

"All of the Chilean fruit carried by Pacific Seaways' vessels is discharged at Wilmington," Keefer states. "These are not containerships that call at multiple ports in the US."

The same is true for the other breakbulk fresh fruit programs.

According to Keefer, the practice makes economical good sense and it is best for the perishable cargo to discharge in one location, especially if the port offers the necessary warehouse capacity and is easily accessible to millions of consumers.

"Wilmington is in easy reach of those consumers," he says. "This is where the largest concentration of people live who consume fresh fruit and juice. By calling at Wilmington, it helps keep inland transportation costs low. It is an important factor in the supply chain since

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organization. Everyone is engaged.

I've been part of this approach at both asset- and non-asset-based companies. The more you empower people, the more efficient the company becomes.

So, how is your varied experience with steamship lines – including SeaLand, Mitsui O.S.K. Lines and P&O Nedlloyd – and, most recently, in starting the third-party logistics firm of Summit Global Logistics and as executive vice president of Maher Terminals LLC proving valuable in your leadership of Trailer Bridge?

My experience will allow me to bring a broader, seasoned perspective of the ocean ecosystem to Trailer Bridge. I intend to merge the best practices that I've learned not only at carriers but also NVOs [non-vessel-operating common carriers] and terminals with the best practices in place currently at Trailer Bridge. Coupling my ocean knowledge with the NVOCC experience creates a unique perspective and advantage in our marketplace.

In the past, strong market growth allowed the liner sector to operate in a quite forgiving environment. Those days are long gone. Shipping companies today are in an ultra-competitive space, facing new demands, volatile fuel prices and a marketplace heavily weighted to macro-economic fundamentals. Efficiency and execution of customer expectation is critical to long-term market sustainability.

Additionally, I'm a big fan of technology. Specifically, I like technology as it pertains to increasing the efficiencies of our customers' logistics operations. My plan is to use or develop – either in-house or through third parties – solutions to make Trailer Bridge the technology leader in transactions among carriers in the Caribbean trade. Essentially, I want our user platform to add value to our customer's logistics process.

Trailer Bridge has long relied upon 53-foot-long containers for moving freight between the U.S. mainland and Puerto Rico via an integrated system involving trucks and tug-barge units. Do you see this continuing to be critical to the company's strength?

Absolutely, without a doubt. I think the 53 container within our tug and barge network is the best value for the shipping dollar in the market today. Longer term, we see the potential for LNG [liquefied natural gas] tugs to further enhance the value proposition of our model.

Last year, due to overwhelming customer demand, we added 1,125 fifty-three-foot units into our fleet. If you look at 53s in the domestic intermodal market, and our operational network, both landside and ocean, there is no better piece of equipment. We have always offered 40-foot equipment, and will continue to do so, but we find our customers migrating to 53s in our trade lanes. They immediately find that 53-foot economics prove beneficial.

Specific to Puerto Rico, what are your views regarding the present and future of the island commonwealth's economy, and how is this impacting decisions being made at Trailer Bridge?

Puerto Rico is the lifeblood of our company. We are committed to Puerto Rico. There are interesting opportunities in that economy which are so vital to the

region's growth and only reaffirm our long-term approach to service quality.

We feel that, with our present service portfolio, we are the best-positioned carrier to take advantage of any upturn in the Puerto Rican market with additional capacity to deploy as the market requires.

With the youngest fleet in the trade, I feel comfortable that our customer base, particularly in Puerto Rico, acknowledge that we have the right mix of value, service and execution to accommodate their needs. Our two weekly services offer a pretty attractive product mix, for both container and ro/ro [roll-on/roll-off cargo].

You've moved south from New Jersey to Florida just in time to miss the latter part of this rough winter in the Northeast. How are you and your family liking Jacksonville?

I really have enjoyed my transition to Jacksonville. Unfortunately, the family is back in New Jersey. I would say that right now, until the school year ends, the family and the kids will stay domiciled in the Garden State and I will stay in the Sunshine State.

I would throw in the fact that Disney and Orlando are not too far from Jacksonville, and that isn't a bad draw for the kids.

Your work certainly keeps you busy, but, when you do get some time away from it, what sports, hobbies and other outside interests do you enjoy?

I quite like to fish, and no doubt, I may get to catch a few more here than I did last summer in Jersey. Fishing really solidifies my appreciation for luck.

Have you had such an opportunity yet?

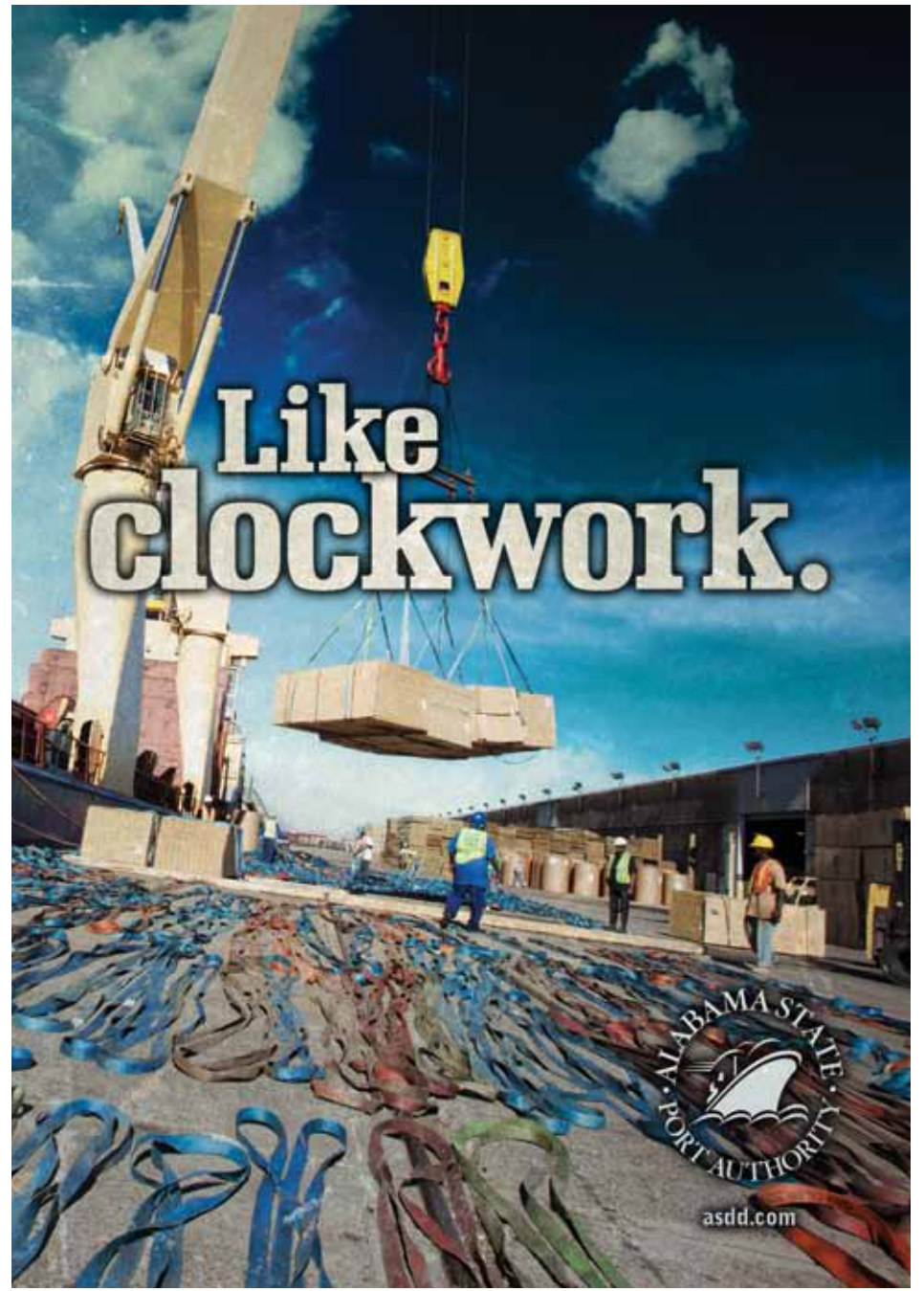
I'm commuting right now. New Jersey on the weekends, and back down here Sunday nights. I haven't had a chance to go out and wet a line yet, but, hopefully, that's coming soon.

(OPPORTUNITY – continued from page 8)

region, with a larger impact on small producers," it said. Paved roads represent less than one-third of the regional road network. Poor road quality results in direct losses of between eight and 12 percent of the sales value from delays in shipments, breakage, losses in livestock weight, and losses in the quality of perishable goods.

Infrastructure issues plague the region's seaports as well. "Many of the region's container ports must improve operational efficiency in order to attract larger cargo volumes, while others need to expand their infrastructure stock," said the report. "The absence or scarcity of container cranes and other equipment further hinders port performance." There are only four container cranes in use in Central American countries outside of Panama.

"It is not uncommon for infrastructure to have to catch up as trade develops even in countries experienced in trade," said Imbriani. "In China many factories have moved to the interior and there has been a struggle to keep the infrastructure up. But China is a rapidly developing country with a lot of money, and they are working to solve these problems. Central America is not as strong economically and it will take longer to solve



their problems."

The proliferation of free trade agreements has yielded disappointing results in the case of Central America. "Neither the number of products exported nor the number of markets served have changed significantly," said the World Bank report. "Tariff reductions seemed to have a positive but very small effect on the number of new exporters as well as on the behavior of incumbent firms. These findings may be suggesting that barriers that remain to be tackled have limited the potential gains to be made from trade agreements and liberalization policies."

Other measures that need to be taken, according to the World Bank, include improving the quality of institutions and investments in human capital, infrastructure, and technology. Robayo agrees with that assessment. "I would suggest providing more training in international trade and upgrading IT systems," he said. "There needs to be created a sense of urgency for people to understand that when millions of dollars worth of goods are being moved, people need responses quickly and they need to be correct the first time."

"To some extent Central America is a forgotten area of the world," said Imbriani. "But people are missing out on opportunities that do exist there so maybe it's time for some to start focusing on the region."

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everyone is trying to control and reduce these costs as much as possible."

Economies of scale are what the Port of Wilmington is about. With six refrigerated warehouses, it offers the largest on-dock, on-terminal cold-store complex. Thirty-five chambers are incorporated into those warehouses that can do chilled to frozen cargo. The port is well positioned on the Delaware River and it has direct access to highways I-495, I-95, route 13 and I-295.

"Within a quarter of a mile, you are on the interstate and can go north or south," Keefer comments. Such access also puts its assortment of perishables on the plates of some 250 million consumers.

Its terminal operations enjoy excellent cooperation with the U.S. Department of Agriculture (USDA) and U.S. Customs and Border Protection (CBP), which are on terminal and critical for inspecting, safeguarding and releasing perishable cargo.

"We also offer a host of value added services," Keefer adds.

These include, but are not limited to, USDA approved cold treatment and fumigation; post fumigation Rapid Cooling; controlled atmosphere storage; and, cargo expediting. The temperatures in reefer chambers are monitored 24/7 for conformance with cargo storage requirements. Dynamic digital temperature displays are continually updated and are conveniently located for use by the operational and management team for prompt response. Temperature readings are recorded and archived for use should they be needed in the future.

Keefer explains that the port offers Rapid Cooling because at the end of the Chilean fruit season there are high quality grapes that come on the market and this technology prolongs their shelf life.

"After the Chilean fruit season ends the Mexican program does not start until mid May, so there is a period of time where there are no grapes in the market," he says.

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**(DEMAND – continued from page 2)**

for high value seafood species,” the GAIN report stated. These include lobster, crab, geoduck and cod. In fact, the U.S. Customs district, Anchorage, Alaska report through the eleven months of 2012 indicated 6,154,384 kilos for \$63,397,735 of frozen snow crab, over 29 million kilos for \$91,338,179 of frozen cod and lobster (live, fresh, dried, salted, brine, frozen) exported to China amounted to 3,619 kilos for \$76,213.

China experienced the largest increase of Alaska seafood exports in volume and value from 2007-2011 of 53 percent year over year change compared to 8 percent for Japan and 29 percent for South Korea. Total export values in 2011 were \$938,681.2; \$690,350.8; and \$339,360.1 for China, Japan and South Korea, respectively. By comparison, EU exports changed 26 percent over those years for a total in 2011 of \$797,601.8. Exports to all countries from Alaska totaled \$3.263 billion, a 27 percent change, 2007-2011, according to the National Marine Fisheries Service.

Also, in China, there are changing eating habits and conveniences offered by more processed and packaged seafood over traditional live seafood purchases from local street vendors. In addition, the safety of local seafood varieties is in question by Chinese consumers after food safety incidences over the past few years in China. “Local consumers perceive imported products as safer and are thus willing to pay a premium for them,” based on the GAIN report. As a result of these market changes, supermarkets and not just restaurants and hotel chains are export customers for Alaska seafood products.

Even though Alaska seafood exports travel 90 percent frozen by ocean container, there is “still demand for live, and fresh whole fish,” said an Alaska producer in a recent interview with the *American Journal of Transportation*. Air shipments are wheels up from Ted Stevens International Airport in Anchorage and from Seattle airport, yet “Alaska seafood exports face strong competition from Russia for most North Pacific species,”

**(TOP – continued from page 10)**

These high quality grapes are shipped in special packaging and Rapid Cooling gives customers the opportunity to hold their fruit longer in the warehouse so that they can get better prices.”

In addition, the port is equipped with a world class inventory management system based on bar code technology that is supported by a wireless network of over 60 antennae located both within the warehouses and on the terminal. Bar-coded palletized cargo is scanned upon discharge and exporters, receivers and shipping lines can track their cargo as it moves through the port using Wilmington’s proprietary web-based, real-time inventory management system ePort. All information in the system is password-protected ensuring the confidentiality of sensitive commercial information.

he said. Alaska Dungeness crab, king crab and snow crab can be flown to Guangzhou province, Huangsha wholesale market by importers, wholesalers and re-processors and over 60 percent of the U.S. seafood sold in the market comes from Alaska.

Alaska seafood exports to Japan, China and South Korea have good prospects, yet there is competition and a changing economic and regulatory regime. For decades the reputation of Alaska seafood built up good relationships with the Japan market and “our products are well established with consumers.” In China, there is “considerable potential in the domestic market, rather than simply as a reprocessing sector,” concluded Alexa Tonkovich of ASMI. For the Korea market, the U.S.-Korea Free Trade Agreement impact on fishery products is not evident and these tariffs may “have a few more years to reach the bottom,” Tom Asakawa, NOAA Fisheries Commercial Specialist – Asia, told *AJOT*.

**(RECORD – continued from page 1)**

now composed of ten “member” networks (Madrid-based Conqueror Freight Network joined earlier this year).

Yokeum explained that one of the reasons for forming the group was to form an entity as “a voice for the forwarding community” in international trade groups like an IATA.



David Yokeum – President & CEO of the WCA

Perhaps the most important initiative undertaken by

the WCA in recent years is the establishment of WIN (Worldwide Information Network). John DeBenedette, Managing Director of WIN, took over the company last year. WIN, which is an IT platform (although that is something of an understatement), is really a revolutionary system that will enable independent forwarders to electronically share shipping data across virtually any platform in real time with exceptional functionality. DeBenedette, who was VP Commercial at Intrta, and Director of Technology for Schenker, before joining WIN, said that the platform will “save forwarders time and money” and in the near future, electronic submission of documentation may be the only way to file. One element that DeBenedette brought to the table is working with software companies like IES/Descartes, Softlink, SCMPProFit and Riege. In addition, Intrta has also come aboard bringing with it their considerable connections to the ocean carrier networks.

The conference also highlighted a very unique deal that the WCA has with Dubai-based Etihad Airways. The WCA-Etihad deal allows the air carrier to act as a vendor within the WCA. This gives members access to Etihad Crystal Cargo’s freight network. “WCA members have full access to Etihad’s airway-bills with no bonds,” said David Kerr, Vice President of Cargo for Etihad.

The main event at the WCA conferences is the one-on-one sessions, which have been described as speed dating for forwarders. Roughly 100,000 sessions were held in the 15<sup>th</sup> World Cargo Alliance alone. The one-on-ones along with the informal networking makes the WCA annual conferences the most important networking event of the year for independent forwarders, which accounts for the increase in delegates despite the global recession and weak economic performance of the last five years. (see *WCA Conference photo spread on page 19*)

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