



3PL Value Creation Asia Summit 2017

KPMG Office, Hong Kong

May 17th, 2017

Agenda

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7:15 – 7:55 **Registration & Continental Breakfast**

8:00 – 8:20 **Welcome and Opening Statements by
Evan P. Armstrong, *President*, ARMSTRONG & ASSOCIATES, INC.**

8:25 – 9:40 **3PL Global View and Regional Variations**

This introduction sets the stage. Who are the major logistics players and regions?
What are the global paradigms for success?

- Global Supply Chain Managers – Who are they? What differentiates the top providers?
- Threshold IT and process levels
- Logistics revenue distribution by countries and major regions
- World class operations – examples of the best from China, Southeast Asia, the Americas and more

9:50 – 10:50 **3PL Mergers and Acquisitions**

This session will examine the overall investment trends in the market from a financial perspective.

- This session will assess the key drivers of 3PL company valuation.
- What are the overall strategic and equity investment trends driving the market right now?
- What are the dynamics for 2017 and beyond?
- What key components have contributed to the surge in strategic acquisitions?
- Privately held and publicly held seller motivations and expectations
- Expectations by deal sizes including shifts in multiples
- Non-asset versus Asset-Based providers
- What is the pattern for EBITDA multiples?
- How are growth rates in major economies impacting prices?

11:00 – 11:55 **Innovation for Driving Successful Operations**

This session will look into future innovations in the America's market. Major trends – Who's hot and what have they got?

- IT and innovations – WMS, TMS and GSM and cloud-based collaboration
- The developing role of CRM
- New apps to drive profitability and growth
- Omni-channel distribution and IT support systems

- 11:55– 1:00 **Group Luncheon**
- 1:05 – 2:05 **Creating Greater Value in Value-added Warehousing/Contract Logistics**
 Spurred by the changes that omni-channel, B2C e-commerce impacts, cold chain and reverse logistics will drive, value-added warehousing will be a hot segment for 3PL providers. How can providers create value? What will it take to succeed in this segment?
- Growth, vacancies and new construction in Asia markets and globally – big boxes
 - RF, voice, and other technology impacts
 - Getting the edge with the best WMS and IT, lean programs, KPIs for control, managing cost
 - Expectations, procurement involvement and cross selling
 - Cold chain, e-commerce and reverse logistics
 - Operating margins and value improvement for owners and customers
 - Lean management and continuous improvement
- 2:15 – 3:10 **Supply Chain Mega-Trends: Big Data, Asian Consumer Markets, Nearshoring, 3D Printing, Autonomous Vehicles, Drones, Value Creation**
 E-commerce, emerging Asian consumer markets and nearshoring are set to trigger major supply chain transformations. This panel will explore how mega-trends will change future supply chains. What changes will solution providers make to handle the new challenges and opportunities?
- 3:20 – 4:15 **International Transportation Management/Freight Forwarding**
 This session will evaluate the state of the global transportation management market and the direction the market will take over the next 5 years.
- Air and ocean volumes, trends and mode shifts
 - Regions for growth
 - Sea/Air/Land multimodal solutions
 - Value-added services
 - CFS/IPI/LCL network changes – expanded LCL and transloading
 - Customs brokerage
 - Labor/port disruptions
- 4:25 – 5:25 **Value Creation: The Key to Success and Creating Greater Value**
 Creating value for customers and owners is essential. 3PL providers and financial experts share their visions of the future for third-party logistics.
- Vertical industries – current 3PL activity and growth drivers
 - Consolidation
 - Value creation – lean, sustainability, new paradigms, innovation
 - Public vs. private ownership – private equity's impact – good and bad
 - Cross selling transportation management, warehousing and freight forwarding
- 5:30 – 5:45 **Trends Consolidated; 2017-2018 Predictions; Closing Thoughts**
Evan P. Armstrong, President, ARMSTRONG & ASSOCIATES, INC.
- 5:45 – 7:00 **Summit Networking Reception**