



3PL VALUE CREATION NORTH AMERICA SUMMIT 2018



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OCTOBER 16-18, 2018 | CHICAGO, IL

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BULLS LEAD
Third-Party Logistics
Market Results and Trends for 2018
Including Estimates for 190 Countries
June 2018



**2018 THIRD-PARTY
LOGISTICS BRAND
RECOGNITION**
September 2018



**E-COMMERCE LOGISTICS
IN THE UNITED STATES**
Domestic and International Transportation,
Warehousing and Fulfillment, Last-Mile Delivery,
and Reverse Logistics
April 2018



**Global and Regional
Infrastructure, Logistics Costs,
and Third-Party Logistics
Market Trends and Analysis**
October 2017



**DIGITAL FREIGHT
MATCHING**
Capturing Technology-Based
Efficiencies in the Trucking
Industry
July 2016



FIRST WAVE PICK
The Business of Warehousing in
North America - 2018
Market Size, Major 3PLs, Benchmarking Costs,
Prices and Practices
February 2018



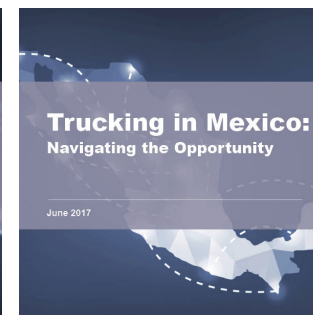
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EXPERTISE
COULD BE
YOURS**



**TRENDS IN
3PL/CUSTOMER
RELATIONSHIPS**
2017
May 2017



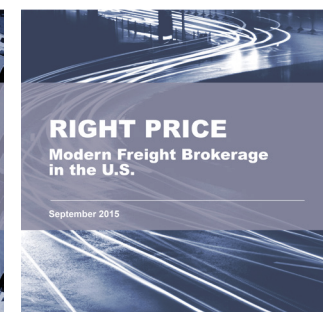
Trucking in Mexico:
Navigating the Opportunity
June 2017



KEEP IT RUNNING
The Quintessential
Spare Parts Logistics Report
January 2017



**DEDICATED
CONTRACT CARRIAGE**
The New Normal in Trucking
January 2016



RIGHT PRICE
Modern Freight Brokerage
in the U.S.
September 2015



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WELCOME

Welcome to the 3PL Value Creation North America Summit 2018

We're pleased to welcome familiar faces and new attendees to the sixth annual Armstrong & Associates 3PL Value Creation North America Summit.

At this year's event you can expect to gain a global view of the third-party logistics industry and mega-trends shaping the landscape. Our incredible lineup of panelists includes 3PL executives, technology innovators, and investment community leaders.

On Tuesday, we're proud to offer an industry-leading 3PL Finance and Investment Briefing day. We'll assess consolidation and roll up opportunities, 3PL deal valuation drivers and trends, dynamics among strategic and financial buyers, and mid-market opportunities. We'll close out the day with a high-level discussion of the M&A landscape.

On Wednesday, we'll set the stage with an overview of global and regional 3PL trends before taking a deep-dive into each 3PL segment: value-added warehousing and distribution, domestic and international transportation management, and dedicated contract carriage.

Our industry is a rapidly changing one, so we've set aside ample time to discuss today's innovations and tomorrow's predictions. Throughout

the Summit, industry experts will cover the latest in automation, robotics, artificial intelligence, and information technology. We'll consider the role of digital freight matching in 2018 and how e-commerce is changing our industry.

On Thursday, we'll look to the future. What supply chain mega-trends can we expect to spur growth? Where does e-commerce present opportunities? And what are experts predicting for 2019 and beyond?

As always, we hope you find the discussions engaging and interactive. We're excited for you to explore opportunities for value creation during panel discussions and as you exchange knowledge and network with your best-in-class peers.

Kind regards,

Richard D. Armstrong

Chairman and Chief Executive Officer
ARMSTRONG & ASSOCIATES, INC.

Evan Armstrong

President
ARMSTRONG & ASSOCIATES, INC.

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TUESDAY, OCTOBER 16



AGENDA

8:00 – 9:00 a.m.

Registration and Networking Breakfast

9:00 – 9:15 a.m.

Welcome and Opening Statements

- **Richard D. Armstrong**, Chairman and Chief Executive Officer, **ARMSTRONG & ASSOCIATES, INC.**

9:20 – 10:25 a.m.

Transportation & Logistics Market Opportunity for Consolidation and Roll Ups

Moderator:

- **Nikhil Sathe**, Managing Director – M&A Advisory, **ARMSTRONG & ASSOCIATES, INC.**

Panelists:

- **Jon Hottinger**, Senior Vice President Logistics & Transportation Group, **BB&T CAPITAL MARKETS**
- **Ronald Lentz**, Managing Director, **G2 CAPITAL ADVISORS, LLC**
- **Robert (Bob) Voltmann**, President & Chief Executive Officer, **TRANSPORTATION INTERMEDIARIES ASSOCIATION**

10:25 – 10:45 a.m.

Networking Break

10:45 – 11:35 a.m.

Deal Valuation and Trends – What Drives the Value of 3PL Assets?

Moderator:

- **Evan Armstrong**, President, **ARMSTRONG & ASSOCIATES, INC.**

Panelists:

- **Paul Jones**, Managing Director, **RAYMOND JAMES & ASSOCIATES, INC.**
- **Adrian Pasricha**, Principal, **CLAIRVEST GROUP**
- **Nikhil Sathe**, Managing Director – M&A Advisory, **ARMSTRONG & ASSOCIATES, INC.**

TUESDAY, OCTOBER 16 *(continued)*

11:40 a.m. – 12:30 p.m. Strategic vs. Financial Buyers – Major Differences and Dynamics

Moderator:

- **Nikhil Sathe**, Managing Director – M&A Advisory, **ARMSTRONG & ASSOCIATES, INC.**

Panelists:

- **Jeff Burkett**, Director, Transportation & Logistics Group, **HARRIS WILLIAMS**
- **Geoff DeMartino**, Vice President – Corporate Development, **HUB GROUP**
- **Ryan Roberts**, Investment Partner, **PPC PARTNERS**
- **Daniel Snow**, Managing Partner, **TRAFFIX**

12:30 – 1:40 p.m.

Group Luncheon

1:40 – 2:35 p.m.

Mid-Market Consolidation, Roll Ups and M&A

Moderator:

- **Nikhil Sathe**, Managing Director – M&A Advisory, **ARMSTRONG & ASSOCIATES, INC.**

Panelists:

- **Robert Levin**, Managing Director, **REPUBLIC PARTNERS**
- **Christopher Wofford**, Managing Director, Head of Supply Chain & Logistics, **WELLS FARGO SECURITIES**
- **Mark Yeager**, Chief Executive Officer, **REDWOOD LOGISTICS** & Senior Advisor, **CI CAPITAL PARTNERS**

2:35 – 3:00 p.m.

Networking Break and Private Meetings

3PL REAL ESTATE STRATEGY

CULTURE OF HUSTLE

- Site Selection
- Overflow / Peak Season Solutions
- Lease Renewal Negotiation
- Excess Property Disposition
- Labor Analytics
- Economic Incentives Negotiation
- Supply Chain Strategy

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TUESDAY, OCTOBER 16 *(continued)*

3:00 – 4:00 p.m.

Summarizing the M&A Landscape – New Headwinds and Tailwinds in the Industry

Moderator:

- **Nikhil Sathe**, Managing Director – M&A Advisory, **ARMSTRONG & ASSOCIATES, INC.**

Panelists:

- **Evan Armstrong**, President, **ARMSTRONG & ASSOCIATES, INC.**
- **Kristopher Hopkins**, Director and Head of Transportation & Logistics Group, **HOULIHAN LOKEY**
- **John Larkin**, Managing Director – Transportation and Logistics, **STIFEL INVESTMENT BANKING**
- **Kevin Sterling**, Managing Director and Senior Equity Research Analyst, **SEAPORT GLOBAL SECURITIES LLC**

4:00 p.m.

Finance and Investment Briefing Adjourns

WEDNESDAY, OCTOBER 17

7:30 – 8:10 a.m.

Registration and Networking Breakfast

8:15 – 8:20 a.m.

Welcome and Opening Statements

- **Richard D. Armstrong**, Chairman and Chief Executive Officer, **ARMSTRONG & ASSOCIATES, INC.**

8:20 – 9:20 a.m.

Global View and Regional Variations

Moderator:

- **Evan Armstrong**, President, **ARMSTRONG & ASSOCIATES, INC.**

Panelists:

- **Dr. Jae Auh**, Senior Vice President, **CJ ROKIN LOGISTICS, CJ LOGISTICS**
- **Sean Kelly**, SVP, Business Development, **GEODIS**
- **Matt McInerney**, Vice President, Global Forwarding Sales, **C.H. ROBINSON**

9:25 – 10:25 a.m.

Creating Greater Value in Value-Added Warehousing/Contract Logistics

Moderator:

- **Karen Erickson**, Consulting Director, **ARMSTRONG & ASSOCIATES, INC.**

Panelists:

- **Sean Coakley**, Senior Vice President, **KENCO**
- **Joe Goryl**, Vice President, Sales & Marketing, **UNIVERSAL LOGISTICS HOLDINGS, INC.**
- **Vincent Gulisano**, Chief Executive Officer, **B2C 3PL ADVISORS, LLC**
- **Ward Richmond**, Executive Vice President, **COLLIERS INTERNATIONAL**
- **Duane Sizemore**, Senior Vice President, Marketing & Business Development, **SADDLE CREEK LOGISTICS SERVICES**

10:25 – 10:45 a.m.

Networking Break

WEDNESDAY, OCTOBER 17 *(continued)*

10:45 – 11:45 a.m.

International Transportation Management/ Freight Forwarding

Moderator:

- **Ravi Dosanjh**, Executive Vice President – International Advisory, **ARMSTRONG & ASSOCIATES, INC.**

Panelists:

- **Jack Chang**, Managing Director – **JUSDA USA, JUSDA SUPPLY CHAIN MANAGEMENT**
- **Raymond Loehner**, Vice President, Business Development, **DIMERCO EXPRESS GROUP**
- **Michael Piza**, Vice President of Corporate Sales and Marketing, **APEX LOGISTICS INTERNATIONAL**
- **Mike Riegler**, Director, LSP Industry Account Management, **GT NEXUS/INFOR**

11:45 a.m. – 1:15 p.m.

Group Luncheon

1:15 – 2:25 p.m.

Part One: Supply Chain Innovation – Automation, Robotics, and Artificial Intelligence

Moderator:

- **Evan Armstrong**, President, **ARMSTRONG & ASSOCIATES, INC.**

Panelists:

- **Sid Chatterjee**, Vice President - Products, **GREY ORANGE**
- **David Deutsch**, Senior Solutions Director, **PROJECT44**
- **Carl Showalter**, Chief Operating Officer, **FETCH ROBOTICS**
- **Preet Sivia**, Co-Founder, Chief Business Officer, **PARADE**
- **Matt Yearling**, Chief Executive Officer, **PINC SOLUTIONS**



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WEDNESDAY, OCTOBER 17 *(continued)*

2:30 – 3:30 p.m.

Domestic Transportation Management and Dedicated Contract Carriage

Moderator:

- **Patrick Burnson**, Executive Editor, **PEERLESS MEDIA, LLC/EH PUBLISHING, INC.**

Panelists:

- **Dennis Anderson**, Chief Customer Experience Officer, **ARCBEST CORPORATION**
- **Darren Coast**, Senior Vice President - Dedicated & Truckload Company Operations, **UNIVERSAL LOGISTICS HOLDINGS, INC.**
- **Angela Eliacostas**, President and Founder, **AGT GLOBAL LOGISTICS**
- **Robert (Bob) Voltmann**, President & Chief Executive Officer, **TRANSPORTATION INTERMEDIARIES ASSOCIATION**

3:30 – 3:45 p.m.

Networking Break

3:45 – 4:45 p.m.

Digital Freight Matching in 2018

Moderator:

- **Nikhil Sathe**, Managing Director – M&A Advisory, **ARMSTRONG & ASSOCIATES, INC.**

Panelists:

- **Kris Glotzbach**, Head of Enterprise Solutions, **UBER**
- **Abtin Hamidi**, Vice President, **CARGOMATIC**
- **Russell Jones**, Chief Executive Officer, **CARGO CHIEF**
- **Ken Liu**, Co-Founder & VP Business Development, **LOADEXPRESS**
- **Boris Pevzner**, Co-Founder and Chief Executive Officer, **CARGGO**

4:45 – 5:00 p.m.

Remarks by the Reception Host

- **Albert Moon**, Head of Transportation, **ZIPWHIP**

5:00 – 6:00 p.m.

Summit Networking Reception

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THURSDAY, OCTOBER 18

7:15 – 8:00 a.m.

Networking Breakfast

8:00 – 8:10 a.m.

Update and Overview

- **Richard D. Armstrong**, Chairman and Chief Executive Officer, **ARMSTRONG & ASSOCIATES, INC.**

8:10 – 9:10 a.m.

Supply Chain Mega-Trends: Growth Areas, Emerging Markets, and Opportunities

Moderator:

- **Richard (Rich) Hamilton**, Managing Director, **CUSHMAN & WAKEFIELD**

Panelists:

- **Chris Caplice**, Executive Director MIT Center for Transportation & Logistics, **MASSACHUSETTS INSTITUTE OF TECHNOLOGY**
- **Richard Piontek**, Chairman and President, **ECAPITAL, LLC**
- **Mike Regan**, Chief of Relationship Development, **TRANZACT TECHNOLOGIES, INC.**

9:15 – 10:15 a.m.

The Future of E-Commerce Logistics

Moderator:

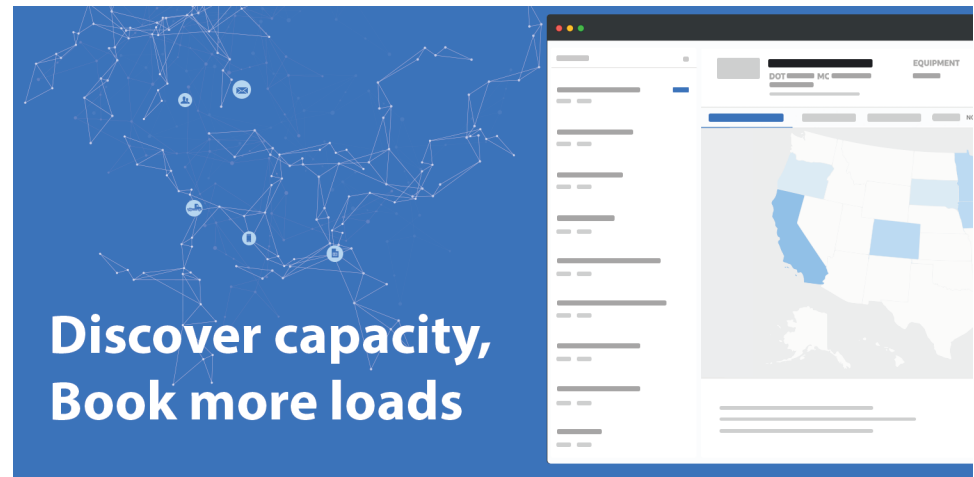
- **Haley O'Donnell**, Manager - Market Research & Special Projects, **ARMSTRONG & ASSOCIATES, INC.**

Panelists:

- **James Gagne**, President and Chief Executive Officer, **SEKO LOGISTICS**
- **Tim Hinckley**, Chief Commercial Officer, **RADIAL**
- **Greg Morello**, President & Chief Commercial Officer, **PORT LOGISTICS GROUP**

10:15 – 10:30 a.m.

Networking Break



Smart Carrier Relationship Platform

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Book More Freight

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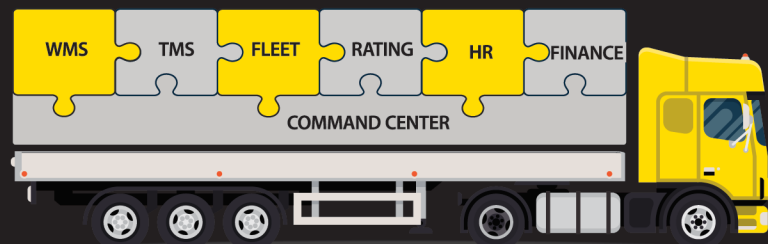
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- Perry Falk, Regional Vice President, Carrier Sales - Nolan Transportation Group (NTG)

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THURSDAY, OCTOBER 18 *(continued)*

10:30 – 11:30 a.m.

Part Two: Supply Chain Innovation – Information Technology

Moderator:

- **Evan Armstrong**, President, **ARMSTRONG & ASSOCIATES, INC.**

Panelists:

- **Matt Bernstein**, Chief Executive Officer, **HUB TRAN INC**
- **Scott Johnson**, Business Line Manager, **NULOGY**
- **Mitch Weseley**, Founder & Chief Executive Officer, **3GTMS**
- **Johann van der Westhuizen**, VP, Strategic Business Development, **ONE NETWORK ENTERPRISES**

11:35 a.m. – 12:45 p.m. **3PL Market Trends and Executive Predictions**

Moderator:

- **Evan Armstrong**, President, **ARMSTRONG & ASSOCIATES, INC.**

Panelists:

- **Frank Guenzerodt**, President and Chief Executive Officer, **DACHSER USA AIR & SEA LOGISTICS INC**
- **Robert Farrell**, Chairman and Chief Executive Officer, **GLOBALTRANZ ENTERPRISES**
- **Chris Pickett**, Chief Strategy Officer, **COYOTE LOGISTICS**
- **Tom Sanderson**, Executive Chairman, **TRANSPLACE**
- **Douglas Waggoner**, Chairman & Chief Executive Officer, **ECHO GLOBAL LOGISTICS, INC.**

12:45 p.m.

Summit Adjourns

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TABLE 6
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One Network is pleased to participate
in this year's panelist discussion,

“ Supply Chain Innovation ”
- Information Technology

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October 18th at 10:30 am!

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-Thomas B. Crowley, Jr., Chairman & CEO, Crowley

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Matt Yearling, CEO, PINC

PANEL > Supply Chain Innovation:
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Wednesday, October 17, 2018 - 1:15pm - 2:25pm



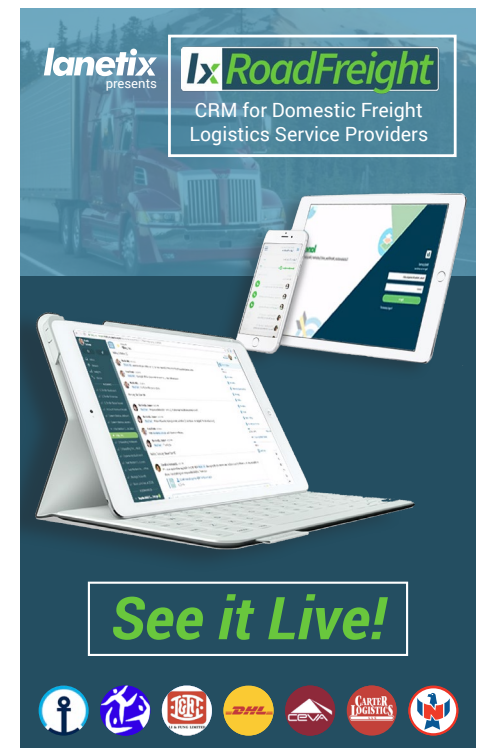
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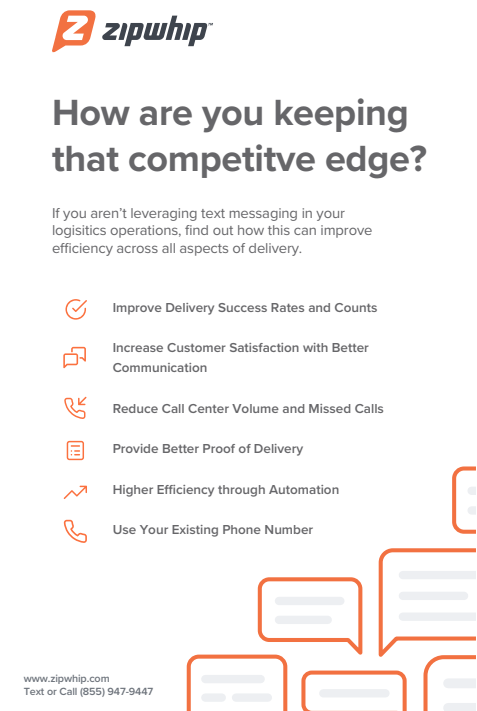
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