



ARMSTRONG &
ASSOCIATES, INC.

3PL VALUE CREATION NORTH AMERICA SUMMIT 2019

October 15-17, 2019 | Embassy Suites Downtown Chicago Magnificent Mile

Tuesday, October 15th

12:30 – 1:15pm *Registration and Networking in Exhibitor Space*

1:15 – 1:25pm *Welcome and Opening Statements*

Richard D. Armstrong, *Chairman & CEO, ARMSTRONG & ASSOCIATES, INC.*

1:25 – 2:25pm **Global View and Regional Variations**

This Executive-level session will discuss third-party market trends found globally and within specific geographies. What are the global paradigms for success?

The impact of recent tariff and trade agreements

- Geographies experiencing windfalls
- Growth within industry verticals – mature, emerging, and commoditized
- The power of supply chain network visibility and control towers
- Ways to align your organization for global success – a five-year outlook
- World class operations –from China, SE Asia, the Americas and more

2:30 – 3:30pm **The Future of E-Commerce Logistics**

Global e-commerce related 3PL revenues are expected to reach \$76.33 billion in 2020. It is imperative that 3PL providers stay on the cutting edge of this rapidly growing opportunity.

- E-commerce retail is changing rapidly. What do emerging retail trends tell us about the future of logistics?
- What services are shippers and consumers asking for?
- As e-commerce becomes more popular in challenging categories, like groceries, pharmaceuticals, furniture, and appliances, how should 3PLs respond?
- The market presents many opportunities for 3PLs, as well as challenges and threats. How can 3PLs compete in a today's market against increasing competition from Amazon?

3:30 – 3:50pm *Networking Break in Exhibitor Space*



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Tuesday, October 15th (Continued)

3:50 – 4:55pm **Part One: Supply Chain Innovation – Information Technology**

Part one of our technology series addresses the proliferation of Information Technology on the supply chain landscape.

- E-Commerce and consumer responsive operations – how is technology addressing the challenges and opportunities
- Buying a system versus developing a system – how to navigate the make/buy decision
- Order management, customer relationship management, and workflow technology trends

4:55 – 5:00pm *Remarks by the Reception Host – Day One*

5:00 – 6:00pm *Summit Networking Reception in Exhibitor Space – Day One*



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Wednesday, October 16th

7:15 – 8:00am *Networking Breakfast/Registration in Exhibitor Space*

8:00 – 8:05am *Update and Overview*

Richard D. Armstrong, Chairman & CEO, ARMSTRONG & ASSOCIATES, INC.

8:05 – 9:00am **Supply Chain Mega-Trends: Growth Areas, Emerging Markets, and Opportunities**

This panel will explore how mega-trends will change future supply chain transformations.

- The impact of tariffs
- Big data
- To automate or not?
- E-Commerce and nearshoring

9:05 – 10:00am **Domestic Transportation Management and Dedicated Contract Carriage**

This session will review growth areas for success with domestic transportation management, freight brokerage, and dedicated contract carriage.

- Cross selling VAWD and transportation management
- Electronic logging device and hours of service market impacts
- Structural changes at the major players – how important are they?

10:00 – 10:20am *Networking Break in Exhibitor Space*

10:20 – 11:15am **Creating Greater Value in Value-added Warehousing/Contract Logistics**

Spurred by the changes that omni-channel, B2C e-commerce, cold chain and reverse logistics drive, value-added warehousing continues to be a growth segment for 3PL providers. How can 3PLs create more value? What will it take to succeed in this segment?

- Growth, vacancies and new construction
- Labor trends and the impact of Amazon
- Big boxes, RF and voice technology impacts
- Customer expectations, procurement involvement and cross selling
- How to address scope creep and maintain margins



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Wednesday, October 16th (Continued)

11:20 – 12:15pm **International Transportation Management/Freight Forwarding**

This session will evaluate the state of the international transportation management market and the direction the market will take over the next five years.

- Air and ocean volume trends and market opportunities
- Operating model trends and integrated solutions (air, sea, road)
- How technology could drive growth and segment the market
- Impact of cross-border e-commerce
- Customs brokerage and security concerns

12:15 – 1:25pm *Group Luncheon/Networking*

1:25 – 2:25pm **Part Two: Supply Chain Innovation – Automation, Robotics, and Artificial Intelligence**

Part two of our technology series addresses how automation, robotics and AI technologies are shaping the supply chain landscape.

- How is automation changing the supply chain management roadmap?
- The future of warehousing management – Does it include products like augmented reality eyewear?
- Artificial intelligence and machine learning – Is there evidence of it in the 3PL world? How will it exist in five years?

2:25 – 2:55pm *Networking/Private Meetings in Exhibitor Space*

2:55 – 3:55pm **Digital Freight Matching in 2019**

What are the major trends in Digital Freight Matching (DFM)? This session explores technologies that have gained traction and how they fit into the logistics landscape.

- How do digital transportation companies differ from traditional 3PLs?
- How have DFM apps changed in the past few years?
- How are they evolving to meet the needs of carriers and shippers?
- What works and what doesn't?
- How can 3PLs take advantage of DFM technologies and best practices?



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4:00 – 5:00pm **3PL Market Trends and Executive Predictions**

This panel is an executive-level review about ongoing 3PL market trends and 2020 predictions.

- Growth challenges and opportunities
- Factors driving operational efficiencies
- Future outlook

5:00 – 5:05pm *Remarks by the Reception Host – Day Two*

5:05 – 6:00pm *Summit Networking Reception in Exhibitor Space – Day Two*

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Thursday, October 17th

8:15 – 9:00am *Registration and Networking Breakfast in Exhibitor Space*

9:00 – 9:15am *Welcome and Overview*

Richard D. Armstrong, *Chairman and CEO, ARMSTRONG & ASSOCIATES, INC.*

9:20 – 10:25am **Transportation & Logistics Merger & Acquisition Trends and Insights**

This session will examine the overall strategic and equity investment trends in the market and provide insight into the factors driving the market forward. It will examine the logistics industry landscape which has attracted a high volume of M&A activity for over 10 years which is expected to continue into the foreseeable future.

- Why does the T&L space continue to attract sponsors, and new and existing strategic buyers?
- How does market fragmentation pose challenges in identifying targets, and what can buyers do to find opportunities?
- Does the mid-market segment provide a unique opportunity for consolidation to drive economies of scale?
- What are the current overall strategic and equity investment trends driving the market?
- What are the market dynamics for 2020 and beyond?

10:25 – 11:00am *Networking Break/Private Meetings in Exhibitor Space*

11:00 – 11:50am **3PL Valuation Trends and Reflections**

This session will reflect on 2017 and 2018 patterns and future trends in valuations in asset and light-asset business models.

- Are the multiples over-emphasized?
- How will macroeconomics impact prices?
- Too many buyers and too much money are chasing T&L non-asset/light-asset deals. Who will win?
- Has the freight brokerage business become over-commoditized? How does it impact valuations?

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Thursday, October 17th (Continued)

11:50 – 1:05pm *Group Luncheon/Networking*

1:05 – 2:00pm **Strategic and Financial Buyer Competition – Major Differences and Dynamics**

This session compares strategic, private equity, and sponsor investments in 3PL assets and each investment dynamic. What major differences impact the investment approach?

- What are the major differences in investment strategies and the way each values assets?
- How do buyers go about finding deals which fit their Investment Profile?
- Will the competition between various buyers send valuations for worthy “assets” into an upward spiral?
- Is investing in transportation or logistics technology an attractive investment?

2:05 – 2:55pm **Transportation & Logistics Mid-Market Challenges and Opportunities**

Since the mid-market presents unique challenges and opportunities within both asset-based and non-asset/light-asset T&L segments, this panel examines issues related to the less talked about mid-market segment of our industry. This panel will discuss:

- Why is the mid-market segment significant and important?
- What level of mid-market fragmentation is there in both asset/non-asset space?
- Why mid-market consolidation and roll up strategies can provide unique opportunities.
- What do sponsors think about mid-market investments?
- What are the usual challenges mid-market companies face in terms of scalability and growth?
- What the mid-market signifies about the future industry landscape.

2:55 – 3:05pm *Networking Break*



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3:05 – 4:00pm **Summarizing the M&A Landscape – New Headwinds and Tailwinds in the Industry**

This session will cover the latest market intelligence and industry dynamics influencing M&A activity into 2020, including:

- Macroeconomic trends that will influence valuations and capital structure.
- Industry dynamics impacting how big strategic and financial investors will approach M&A.
- Trends and trajectory of e-commerce logistics and its impact on M&A.
- Digital brokers, a new reality, how are they impacting the industry?

4:00 – 4:05pm *Remarks by the Reception Host – Day Three*

4:05 – 5:00pm *Summit Networking Reception – Day Three*