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# THRIVING IN CHANGING TIMES

9 - 10 APRIL 2025 | WROCLAW, POLAND

# Thriving in Changing Times

**Format:** a mix of discussion, Q&A, full audience, workshops and two networking dinners.

F&L antitrust policy.

A mix of venues close together: see 'venues' tab.

**Agenda focus:** Wrocław is not an isolated meeting but builds on recent community dialogue on a multitude of topics. The agenda in Poland focuses on:



- Macro trends & value Poland & CEE offers: what began as a cost advantage is now *much* more.
- Changing physical logistics flows & considering effective planning during volatility.
- Physical becomes digital and digital will change physical flows. Supporting leaders and their teams to act in their own companies at the scale and speed which today's challenges require.
- Three further F&L community priorities: competitiveness, climate logistics & energy transition, and building/retaining the best leadership team.

## Agenda, Wed 9 April

**Opening session** (international arrivals throughout the afternoon)

*Venue: Concordia Design, Słodowa 7, 50-266 Wrocław (beside conference hotels)*

- 14:30, Registration & exhibition including CargoON, StorageEU, BuyCo, Another Tomorrow, Polish Road Transport Institute, networking & coffee / tea / snacks.
- 16:00 – 17:00, **Workshop, Competitiveness at a time of lower demand and increased regulatory pressures at EU & country levels.** Moderated by **Philippe Billiet, Wolfgang Lehmacher, Gavin Roser.**
- 17:30, **Market update (part 2): new benchmarking opportunities for everyone?**
  - **Facts & figures:** short summary of part 1 online session (2 April)
  - **Expert insight on how market data & benchmarking opportunities are changing,** led by **Anton Barr & Thomas Larrieu** with audience input.
- 18:15, drinks & networking followed by a warm welcome from F&L & headline sponsor **CargoON** and networking dinner 19:30 in the same venue.



## Agenda, Thursday 10 April



**#Macroeconomic Trends & #Geopolitical / #Geoeconomic Backdrop**

*Venue: Wrocław University of Science & Technology, Wybrzeże Stanisława Wyspiańskiego 27, 50-370 Wrocław*

- 08:00, Coffee (registration for those who were not present yesterday)
- 08:45, A warm welcome from F&L & headline sponsor **CargoON**

### Part 1 – Evidence of changing physical logistics flows & infrastructures

- 09:00, **Macro trends & and understanding value that Poland & CEE offer** – what began as a cost advantage is now much more **Professor Orłowski**
- **Results: new research visualising how, why & where physical flows are changing and considering 4 possible future scenarios that could impact our planning.** Regardless of uncertainty, we must plan and some plans have long investment horizons. **Eduardo Villarroya & Krzysztof Szmidt.**

- 10:45, **Parallel workshops**
  1. **Effective planning: considering trade flows scenarios for infrastructure, intermodality & modal shift intra-Europe.** Moderated by **Charles Baker & Lukáš Handlíř** with opening comments from **Carlo Carmenati, Ralf-Charley Schultze & Serge Schamschula.** *Mix of modalities? Impact of subsidies for charging infrastructure? Our warehouse & production sites? TEN-T infrastructure? Commercial viability of corridors? Volatility?*
  2. **Effective planning: considering trade flows scenarios for global trade flows & changing logistics hubs.** Moderated by **Stavros Karamperidis & Stephen Archer** and led by **Dominik Landa, Marcin Kamola, Agnieszka Mozdierz, Philippe Billiet & audience.** *East-West & North-South? Tariffs? TEN-T infrastructure? Competitiveness?*
- 11:40, **Conclusions? Reflections on morning discussions and considering impact on planning.** Reactions & workshop feedback followed by panel discussion: **Sebastian Sołtys, Damian Kowalczyk, Manuel Jumelet, Sjoerd Eekelaar, Claus Postiasi** moderated by **Sebastian Jarzebowski & Krzysztof Szmidt** with comments from **Professor Orłowski.** *Growing imbalances? Realism of 2030 scenarios? Costs E2E supply chain influence? New routes driving change? Intermodal will remain in the slow lane? Given global volatility, should preparation be around speed of reaction or can we plan to get better results?*

## Part 2 – Physical becomes digital and digital will change physical flows. As a community, can we help each other build windmills instead of walls?

## #Innovation is Key – But How Can We ACT?

- 13:30, **Exploration: technology – cut the noise: what's the real potential of AI for freight logistics?** Vision from **Jonah McIntire**, short illustration from **Ronald Kleijwegt** moderated by **Aleksander Poniewierski.** *Can we use technology to create value-add to generate growth through change?*
- 14:15, **Exploration: innovation – (clue: struggling to execute or scale up is not a lack of resources or technical limitations!).** Building innovation capabilities in our own business. *Understanding what the blockers and how to remove them so that we can all take action in our own companies.* Led by **Mats Forsberg, Staffan Ekholm, Jakob Muus, Martin Böhmer & Wolfgang Lehmacher.**

Tea, coffee & refreshments

- 15:45, **Exploration: entrepreneurial mindset – how does that translate in everyday life? And how can we recruit the right leadership team in current market conditions?** *We have been discussing innovation, but are we lacking the mindset to exploit the ideas? Is finding leaders secondary? Is technology an enabler or is it creating dependency and undermining leadership?* **Radosław Małkiewicz, Mateusz Zając** moderated by **Christoph Szakowski & Aleksander Poniewierski.**
- 16:30, **Exploration: improved decision-making – too many parts of the supply chain lack trust, information sharing and visibility to aid decision-making.** *Can transparency, collaboration and innovation help us create value-add to generate growth through change? What of the Goldilocks principle?* Led by **Tom Ogrodzki, Hadley Dean, Adam Chazanow.**

## Everything has Changed but Nothing has Changed?

- 17:20, **Key questions & next steps,** led by a selection of energetic contributors chosen on the day. *Size matters in our sector, but does the ability to collaborate to create value-added services? How can we move from physical to digital when our sector is about moving physical product?* Summary of key conclusions of the day moderated by **Philip Evans & Krzysztof Szmidt.**
- 17:45, thanks to sponsors, contributors & participants
- Transport over the river Oder to Hydropolis

## Networking dinner & private visit

Venue: Hydropolis, Wrocław

- Hydropolis is the only science museum in Poland dedicated to water. Private guided visits around this fascinating centre, drinks, dinner & networking.



*This meeting is for senior business leaders & their teams; people who are actively leading industry today.*

**All those who attended have a detailed participation list. Participants included:**

A2B Online Container NV	Hupac Intermodal
ALIS (Logistic Association of Sustainable Intermodality)	Interporto Trieste
Another Tomorrow	Klaipeda Free Economic Zone Management Company
Anwil	Kombiverkehr
Arcese Trasporti	Kontransa
Baltic Hub	Kozminski University / CSCMP Council of Supply Chain Management Professionals
Baltic Rail	KWS
Barilla	Litcargo
Bertschi	LKW Walter
Billiet & Co	Loconi Intermodal
BLS International	LogCon East
Blume Global	LPP Logistics
Boekestijn Transport Service	LTG Cargo
BuyCo	LTG Cargo Polska
Captuur	LyondellBasell
Cargill	MDC <sup>2</sup>
CargoON	Nanovo
CFL multimodal	Olympus Business Services
Climeworks	P&G
Codognotto	Panattoni Europe
Corporate Ventures Advisory	Plymouth University
COSCO SHIPPING Lines Polska	Port of Calais
CTL Cargo Trans Logistik	Port of Gdańsk Authority
DFDS Logistics Polska	Port of Hamburg
DP World	PSA BDP
duisport – Duisburger Hafen	PSA International
duisport agency Polska	PwC Polska
e-llis Poland	Quehenberger Logistics
EP Logistics International	Rail Cargo
Eurocash	REDD Platform
Eutraco	Rhenus
FedEx Logistics Poland	Russell Group
Finnlines Polska	Samskip
Freightos Shipsta	Sandvik
Gartner Intertrans	SBB Cargo International
Graphene Partners	Schavemaker Logistics & Transport
Heem Invest	Seerefine
HRT Spedition	



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Smart Freight Centre

SSI Schäfer

Trafikverket

Trans.EU

Transporeon Trimble

TT Thomas Miller

UIRR

Unilever

Unit 45

Upply

Vega International

Vinturas

VOS Logistics

Wärtsilä

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ZLC Zaragoza Logistics Center & MIT Global SCALE Network

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