

Living in the Long Shadow of Malcolm McLean

Trucking Crisis II

AgTC 30th Annual Meeting, Tacoma, WA

June 14, 2018

Clear and Present Challenges

1. We are in a period of volatility and change:
 - Ocean carrier industry consolidation
 - ELD's
 - Trade agreements
2. Conditions show the fragility of US container networks and flows:
 - Acute
 - Structural
 - Systemic
3. Structural and systemic forces **directly impact** long term US agricultural export competitiveness.

Unifying Focus

Supply chain velocity

“how to optimize the dispersion of goods and services to the marketplace”

Universal Formula



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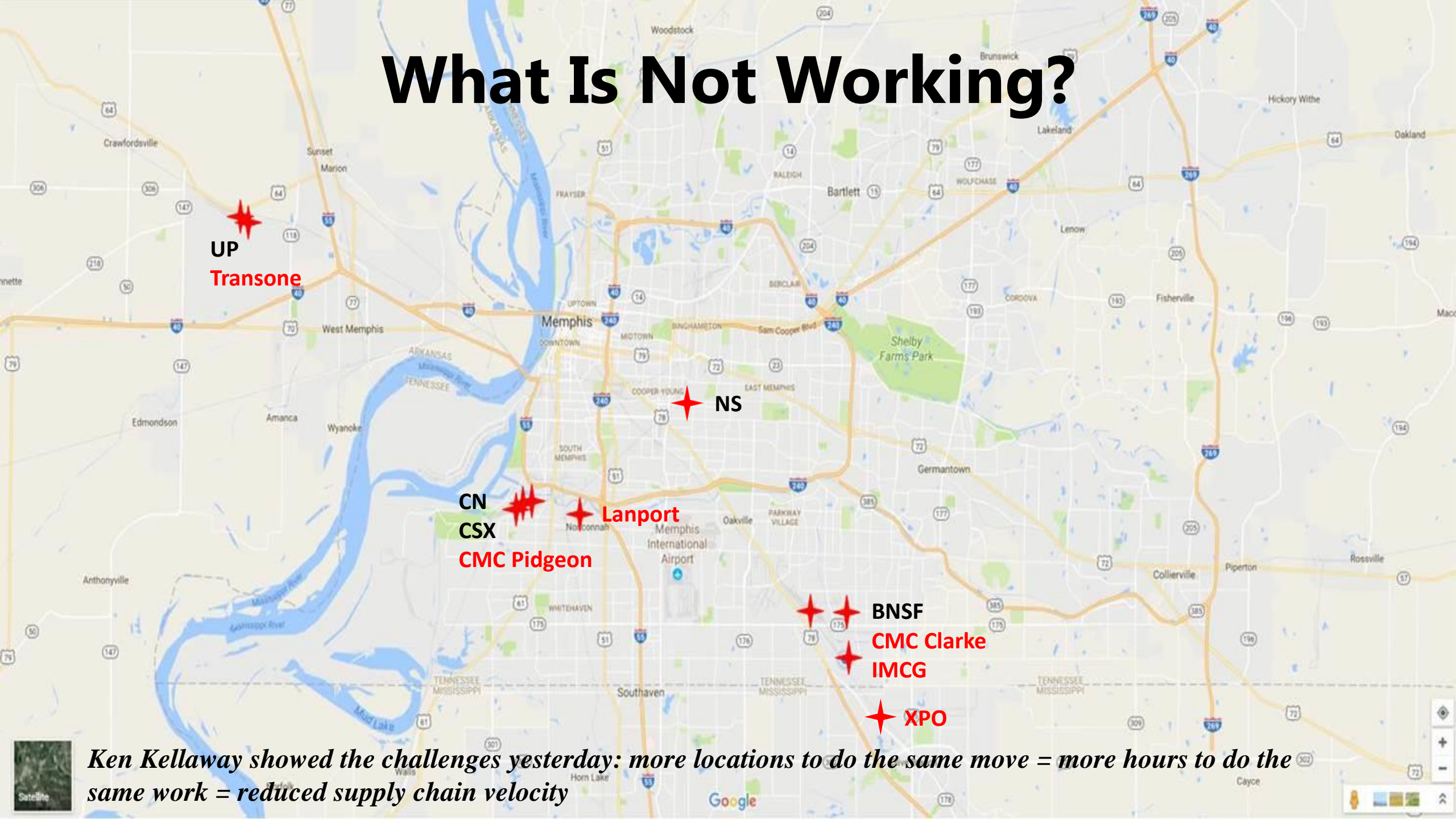
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Export Load

What Must Shippers Do

- **Understand** what is working and not working?
- **Communicate** with your suppliers - what, why, how?
- **Forecast** openly and update
- **Adjust** planning and execution
- **Understand it is not someone else's problem to fix without you**

What Is Not Working?



Ken Kellaway showed the challenges yesterday: more locations to do the same move = more hours to do the same work = reduced supply chain velocity