



Logistics for Europe 2025 Securing Global Supply Chains

Adapting to the new Global Landscape

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International Federation of
Freight Forwarders Associations

The global voice of freight logistics



The function of the Intl. Freight Forwarder

From Architect of Transport to Orchestrator of Global Connectivity

In the 20th Century

- designing routes, choosing carriers, combining modes, and orchestrating complex movements of goods across borders — much like an architect draws up the blueprint for a building.

Today

- the orchestrators of global connectivity, integrating technology, data, and sustainability into everything we move. In a world of disruptions, we don't just arrange transport — we enable global trade to keep moving.

During the Pandemic

- Coming to the rescue of global Supply Chains
→ providing solutions where others failed.



The function of the Intl. Freight Forwarder

Multimodal Transport and the FIATA Bill of Lading

The FIATA Multimodal Transport B/L was established back in 1986!!!

- The first MTO bill of lading of its kind
- It is our industry that has initiated and developed multimodal transport from door to door covered by one document
- What other stakeholders sell today as innovation has been our butter and bread business for 40 years.



The function of the Intl. Freight Forwarder

The FIATA MTO Bill of Lading and requirement of a network and global connectivity

Main asset: Matured global networks

- A Bill of Lading, above involving a door to door move requires a delivery agent at destination
- Destination agent ensures destination competence and professional end to end service
- ➔ provide the global connectivity in order to enable global trade to keep moving.

Agile and customer focus

- We don't need to support own assets, such as our own vessels.
- We are free to choose the best option on behalf of and in the pure interest of our customers.
- We provide solutions tailor-made to the individual requirements of our customers.
- Not bound to seafreight, rail or other modes always an option still using the FIATA MTO B/L.



The function of the Intl. Freight Forwarder

Value added services offered along the maritime supply chain

The Intl. Freight Forwarder and supply chain consultancy

- Network design, routing optimisation and cost benchmarking
- Modal mix analysis comparing sea, air, rail or road and relevant combination
- Carbon footprint reduction strategies
- **Resilience advocacy related to diversification (reshoring, nearshoring etc)**
- Digital trade documentation (for example: eFIATA BL)
- **Geopolitical and trade lane risk assessment and sanction compliance checks**
- **Customs, import Tax and regulatory advisory**
- **Business continuity and crisis management planning**
- Vendor performance analytics
- **Feasibility studies for new corridors and port selection**



Terminal congestion, reasons and consequences

**Once upon a time.....there was a maritime industry that offered weekly sailings → vessel closings 2 days prior to departure → FOB lead times of 4 days, → reasonable free demurrage and detention times = Planning certainty
Environment of respect and honourable merchants**

Today....

- various closings (delivery, docs, VGM, AMS, etc)
→ often 4 days or more prior to vessel departure
- Frequent delays of incoming vessels
→ constant rescheduling of transport arrangements
- Very tight demurrage and detention periods
→ rat race to get containers to the terminals within the free period



Terminal congestion, reasons and consequences

The closing date Paradox and container dwelling times

Container export closing dates

- Have increased up to 5 days and possibly more considering weekends
- Leading to a substantial increase of FOB lead times
- Leading to an increased container dwelling time in the terminals

Demurrage and Detention free periods

- Have decreased in order to reduce dwelling times of containers in the terminals
→ to increase fluidity

.....??? But the extended closing period increase the dwelling time.... Paradox?

Terminal congestion, reasons and consequences

Reasons leading to current terminal congestion

Vessel size 24.000 TEU

- Landside infrastructure cannot cope (as predicted years ago by the OECD)
 - high exposure to even small disruptions leading to delays and congestion
 - the whole system is at its edge ... domino effect in Europe port rotation
 - Truck queues, traffic jams, warehouse congestion, and rescheduling of pre-carriage are becoming the norm rather than the exception.
- Volatile vessel schedules and rotation
 - Unpredictable port calls
 - force us to cancel and re-submit customs declarations
 - continuously rescheduling of transports to meet ever changing arrival times.
 - increasing our cost and is reducing our productivity.

.....and all on the back of our human resources,
who have a difficult time explaining the situation to the customers.



Terminal congestion, reasons and consequences

Extreme situations: export containers not accepted at terminal

Cut off dates changes after empty pick up

- Primarily due to unpredictable vessel arrival times and last minute changes.
- Export containers are empty picked up and loaded
- but cannot be delivered to port terminals due to last-minute cut off changes
- High exposure to risk and extra costs, including detention
- What to do with the container?

Because of the too tight free periods the pick up and delivery to the terminals has become a rat race to meet the deadlines as no shipper wants to pay extra.

Terminal congestion, reasons and consequences

Concentration of shipping lines and another paradox

Concentration of Shipping Lines

- less than 1 dozen global container lines
- organized in three (plus 1) global alliances (as from Feb 2024 four global alliances)

The digitalization paradox

- The word developed: algorithms, AI, automation, connectivity
- but container shipping went backwards?
- lead times from door to door up by 10 days ? (example: North EU to Singapore)
→ excluding the Suez impact !!!
- no more Just in Time.....but **Just in Case**



Terminal congestion, reasons and consequences

Self disruption? And impact on our industry

European terminal congestion = self disruption?

- We don't need external disruptions we are disrupted
- What if Suez reopens?
→ the mother of all congestions?

The impact to our industry, our teams

- Once again, we are dealing with the problem in the front row.
- Our teams go home frustrated and demotivated
→ because again and again we have to cancel and reschedule transport arrangements due to last minute delays of vessel arrival.
→ not productive.... Not very motivating



Terminal congestion, reasons and consequences

The way forward: collaboration of all stakeholders

Responsibility of our industry

- Our industry plays a critical role in the maritime supply chain!!!
- Because we are uniquely positioned
 - to access high-quality original data
 - to maintain a comprehensive end-to-end view of the transport process.

Collaboration of all stakeholders

- advocate for meaningful collaboration across the industry
- to develop smarter, more connected solutions.

.....All stakeholders need to sit together in order to improve the maritime supply chain in the interest of our customers, the shippers.



Terminal congestion, reasons and consequences

The way forward: CLECAT and FIATA initiatives

CLECAT initiative

- called for a return to the discussion on maritime logistics chain performance and governance.

FIATA initiative

- member of the FIT alliance (Future of International Trade Alliance)
→ amongst other focusing on standardization, as well as the strategic use of technology and data and aligning stakeholders.
- member of the Cargo Integrity Group with focus on cooperation in order to improve the maritime supply chain.

Thank you for your attention!

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