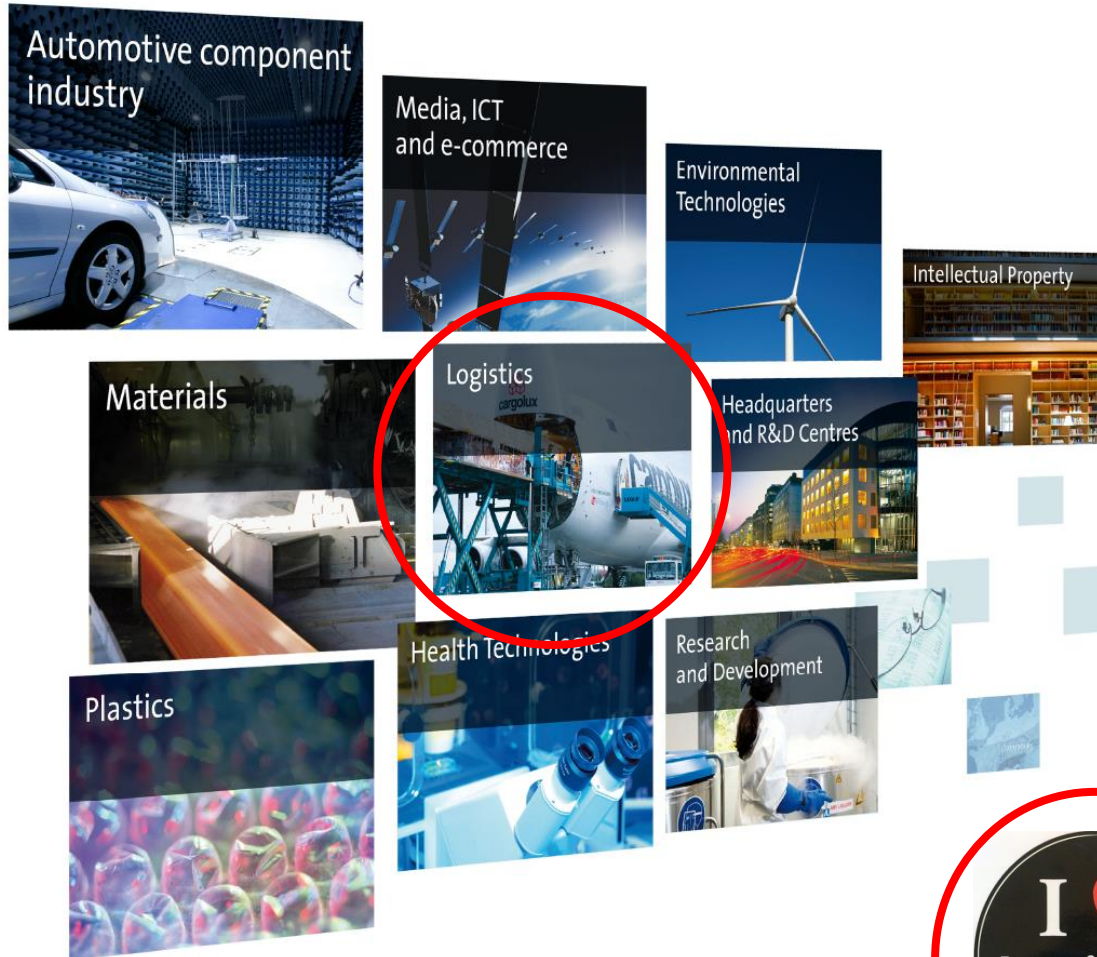


# Luxembourg, a small country with large opportunities

..in Logistics??

Reliable Logistics in the Green Center of Europe  
November 2016

# Logistics plays important role in diversification strategy



**Adding value is the key**



# The Cluster for Logistics



The Cluster for Logistics has been created in 2009 by 7 institutional partners in order to federate public actors and private companies.

## **Mission: support Luxembourg's strategy to reinforce logistics**

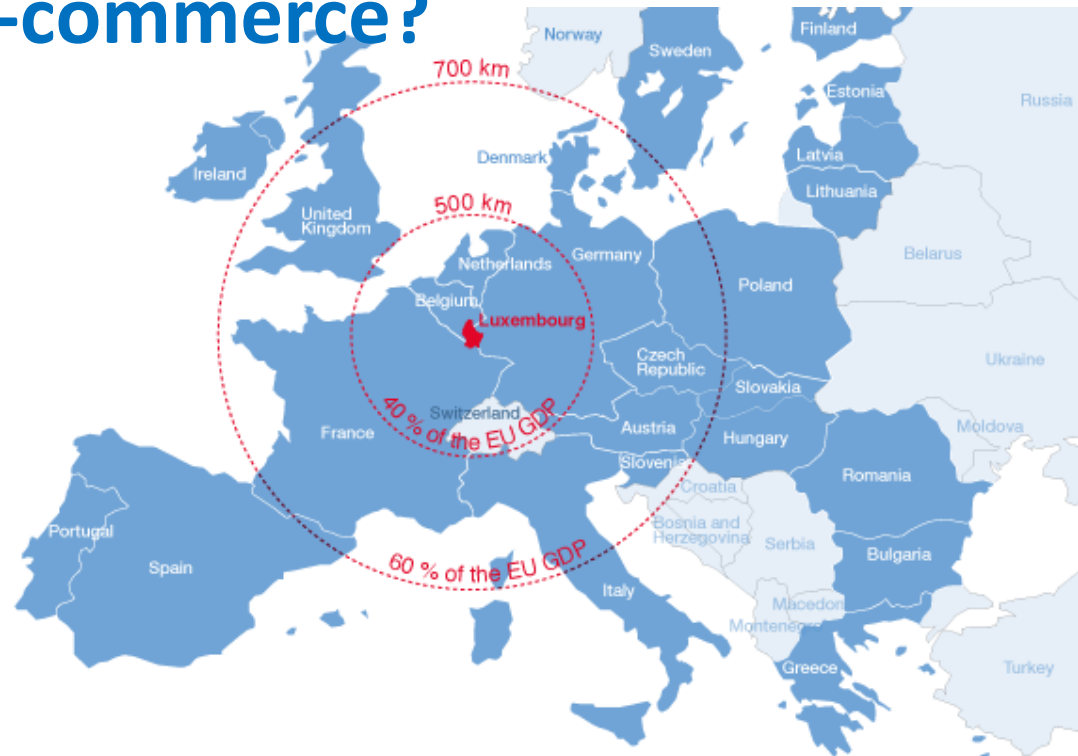
The Cluster focuses on **shippers and logistics companies** but also welcomes all companies and organisations **serving or making use of logistics services**.



Currently the Cluster regroups around 100 actors. Around 60 belong to the Logistics sector while the others provide or request specific services.

# Question to answer:

Is Luxembourg as landlocked country without sea positioned in Europe for global supply chains and e-commerce?



# Companies in Luxembourg

Luxembourg is attractive

## INDUSTRY & AUTOMOTIVE



  
ArcelorMittal

 ROTAREX  
Group

 DU PONT

 GOODYEAR

 PAUL WURTH

 GUARDIAN  
A Gateway of Vision

## ICT, MEDIA, FOOD, E-COMMERCE

 RTL GROUP  
the leading Euro

 FERRERO

 SES<sup>▲</sup>  
your satellite company

 amazon.com

 eBay


 iTunes

 Microsoft

 PayPal

## LOGISTICS



 cargolux

 CFL cargo

 DHL  
WORLDWIDE EXPRESS

 KUEHNE+NAGEL

 Luxair CARGO

 PANALPINA  
on 6 continents

## FINANCE AND SERVICES



 BGL  
BNP PARIBAS

ALLEN & OVERY

 BIL  
1856

 Deloitte.

 BANQUE  
DE LUXEMBOURG


 ERNST & YOUNG  
FROM THOUGHT TO FINISH.™

 KBL  
EUROPEAN  
PRIVATE BANKERS

 KPMG

 Raiffeisen  
Eng Bank, Mail to be rich

 arendt  
ghene & mederbach

Deutsche Bank 

 pwc

## EUROPEAN INSTITUTIONS



 eurostat

 EUROPEAN INVESTMENT  
BANK

 European  
Investment  
Bank

 EUROPEAN COMMISSION

 ESM

# ID CARD LOGISTICS

## A COMPLETE OFFER



COMPANIES	EMPLOYMENT	ANNUAL REVENUES	RELEVANT RANKINGS	OUTSTANDING HUBS
<p><b>800</b> Companies</p> <p>Many international logistics companies have an international hub in Luxembourg</p>	<p><b>12,500</b> Direct jobs</p> <p>3.6 percent of the entire workforce</p>	<p><b>3,8 Mrd. Euro</b> 2015 estimate</p> <p>7.4 % of GNP</p>	<p>Logistics Performance Index - Rank 2</p> <p>1st Country without Sea Harbour</p> <p>IMD Competitiveness Index</p> <p>6th Economy global 1st Economy Europe</p>	<ul style="list-style-type: none"> <li>• Multimodal Bettembourg South hub</li> <li>• Airfreight Findel airport</li> <li>• Riverport Merttert</li> <li>• Freeport Findel</li> </ul>



# Logistics Hub Luxembourg strategically positioned in Europe



Greater Region 11.4 million inhabitants  
BENELUX 28 Million inhabitants



# Luxembourg strategically positioned in Benelux strong in freight transport

## Benelux: strong in freight transport

Sources: Eurostat 2015, STATEC 2015, CBS 2015, Statbel 2015

Benelux 2013:  
- 359 inhabitants/km<sup>2</sup> (3x as much as EU-28)  
- 74,654 km<sup>2</sup> surface area (1.7% of EU-28)



Benelux 2013:  
28.5 million inhabitants  
5.6% of the EU-28



Benelux 2013: 6.9% road transport in/from/to Benelux of EU-28



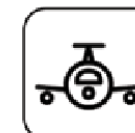
Benelux 2011: 6.0% rail freight transport in/from/to Benelux of EU-28



Benelux 2013: 78.4% inland navigation in/from/to Benelux of EU-28



Benelux 2013: 21.1% sea transport in/from/to Benelux of EU-28



Benelux 2013: 24.4% air transport in/from/to Benelux of EU-28

Sources: Eurostat, Statec, CBS, Statbel 2015





# Compare Luxembourg and Lodz

In comparison with Antwerp



7th largest  
airport in  
Europe  
300 km from  
Antwerp

## Luxembourg

2.586 km<sup>2</sup>

0,563 Mio inh

203 EW / km<sup>2</sup>

49 Mrd. EUR (BIP)  
2014

## Antwerp

205 km<sup>2</sup>  
(2.867 Antwerp  
Flanders 13500km<sup>2</sup>)

0.517 Mio inh  
Metro 1.8 Mio inh  
(Flanders 6.5 Mio inh)

2,500 inh / km<sup>2</sup>  
(470 in/km<sup>2</sup>)

75.8 bn EUR  
181 bn EUR GDP  
2013



7th largest port  
in the world  
No # 2 behind  
Rotterdam in  
Europe



## Your customers expectations?



# Luxembourg Logistics Basics

## The Logistics Sector in Luxembourg

- 800 logistics companies
- 12,500 direct employees – 3.6% of the Labour Force
- 3.8 bn turnover, – 7.4 % of Luxembourg GDP

# No 2 LPI in 2016

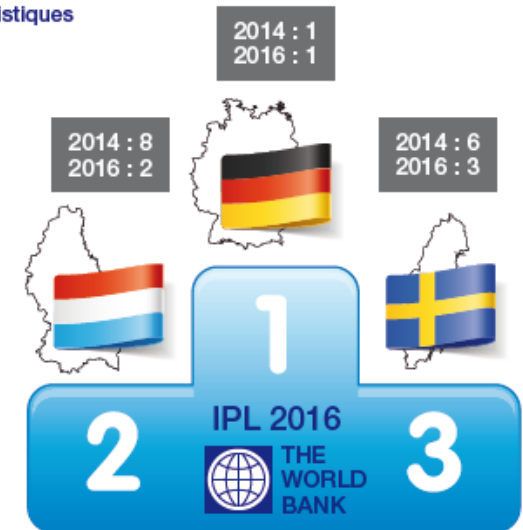
vs 8<sup>th</sup> 2014

## Benchmark:

- No 2 in Logistics Performance Index 2016 of World Bank
- Index of Economic Freedom 2016:
  - Luxembourg ranks 6<sup>th</sup> in the Eurozone
- IMD World Competitiveness Yearbook 2016
  - > 11<sup>th</sup> (6<sup>th</sup>) most performant globally
  - > 7<sup>th</sup> (1<sup>st</sup>) most performant country in EU

Indice de performance  
logistique (IPL) Banque mondiale

6 indicateurs de la  
qualité des services  
logistiques

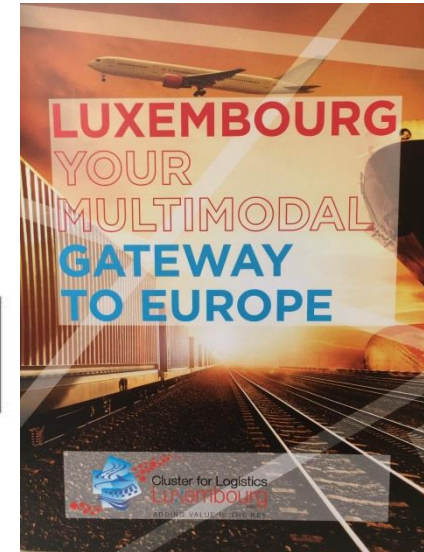


## New Challenge stay on LPI Podium

N = 160 pays au classement Banque mondiale 2016

# Quadrimodal Logistics Infrastructures

Borders with Germany,  
Belgium and France  
570.000 hab.  
2.600 km<sup>2</sup>



# European Freight Corridors



**Main Rail Corridors**

**Main Sea Ports**

**Main Freight Airports**

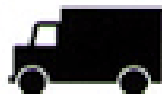
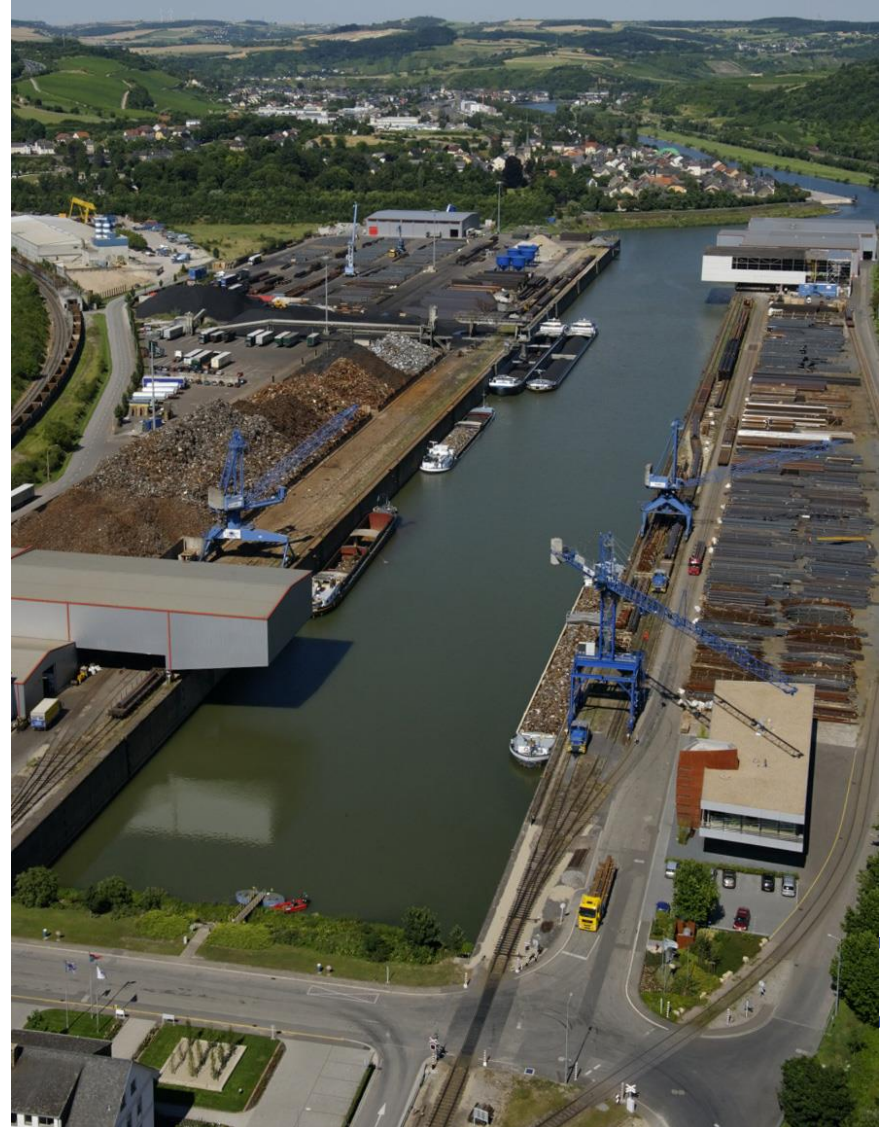
# Logistics Infrastructures

## INLAND MOSEL-PORT MERTERT

- Dedicated to break bulk
- Connection with the north sea ports by the Mosel-Rhine waterway
- 150.000 m<sup>2</sup> surface

### Extended warehousing capacity for clients

- » 10.000 m<sup>2</sup> warehouse space with new secured warehouse (Tapa member)



# Logistics Infrastructures

## Aircargocenter FINDEL

- Modern dedicated infrastructures of annual capacity of 1 Million t
- Top 7 airport in Europe
- Globally Top30 airport
- On-site forwarder logistics centre: 58.000 m<sup>2</sup>
- **Secure, fast and efficient ground handling, unloading and loading of a Boeing 747/8F in 2 hours**
- 8 dedicated wide body aircraft positions (extension to 12)
- Customs clearance 24 x 7
- Top 7 airfreighter Cargolux's main hub
- Value & high competence logistics activities: perishables, pharmaceuticals, hazardous goods, valuable goods, live animals, outsized cargo.

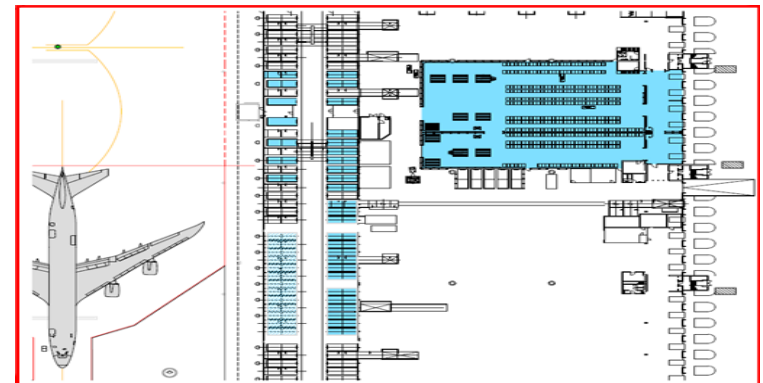


## New Healthcare & Pharmaceuticals Center

All handling is temperature controlled, aircraft handling ramp is adjacent to the storage facility

- » Fully GDP compliant
- » Storage capacity 2°C to 8°C: 350 skids (Euro pallets)
- » Storage capacity 15°C to 25°C: 1.270 skids (Euro pallets)
- » Storage capacity 2°C to 25°C: 70 x 10ft ULD
- » Temperature controlled build-up areas (2°C to 25°C)
- » Six dedicated and temperature controlled truck docks

**Now over 6% is pharma**





# Global Cargo network



## CARGO NETWORK



## The Luxembourg Freeport

- A logistics hub for managing, handling, trading and storing, with no time limit, valuable goods under a regime of suspension of VAT and customs duties.
- Optimal storage conditions (temperature, humidity, extra security, fire protection) adapted to each type of goods stored (art, fine wines, electronic data, precious metals).
- On site: specialized forwarders, professionals and service providers offering shipping, handling, storage of valuable goods, customs agency, art collection management, risk management, expert valuation and scientific analysis of art works.

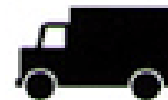


# Logistics Infrastructures

## Rail Road Hub Bettembourg

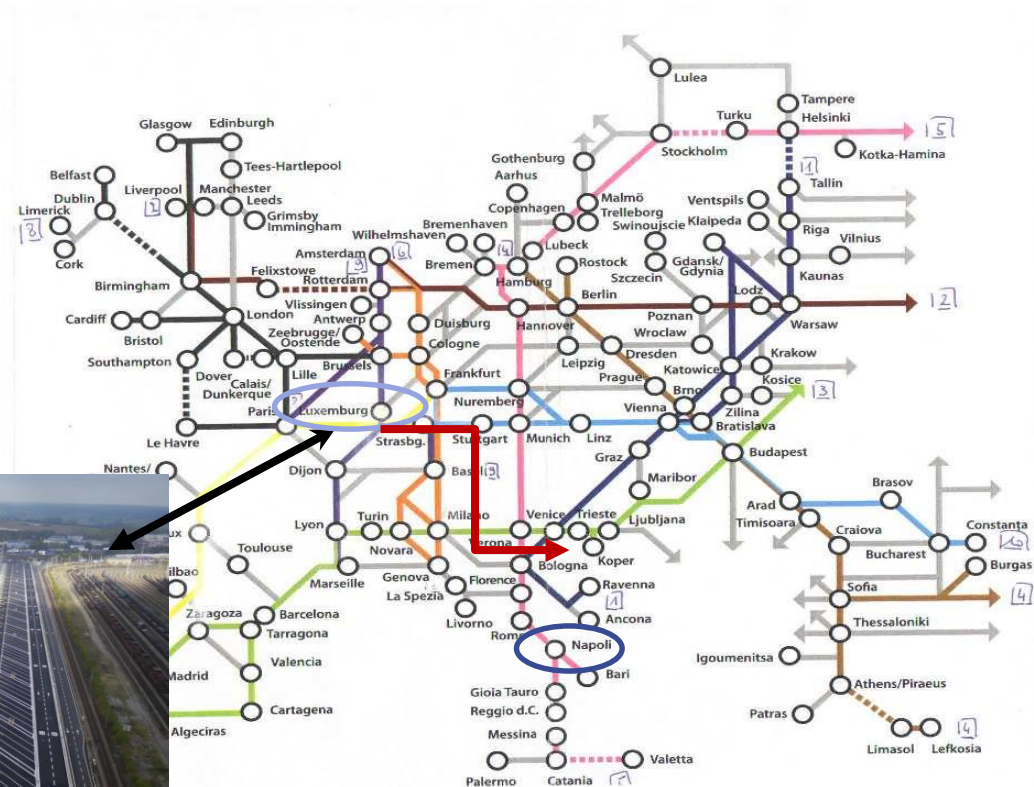
### New combined rail Terminal:

- 4x700 m rail track for 300.000 containers and
- 2x 700 m rail tracks for semi-trailers capacity per year
- Combined train connections to Antwerp, Lübeck, Helsingborg, Le Boulou, Milan and Turkey
- Conventional rail freight services for international, regional & local customers
- Daily connections to Antwerp, Basel, Hamburg/Duisburg and Poland



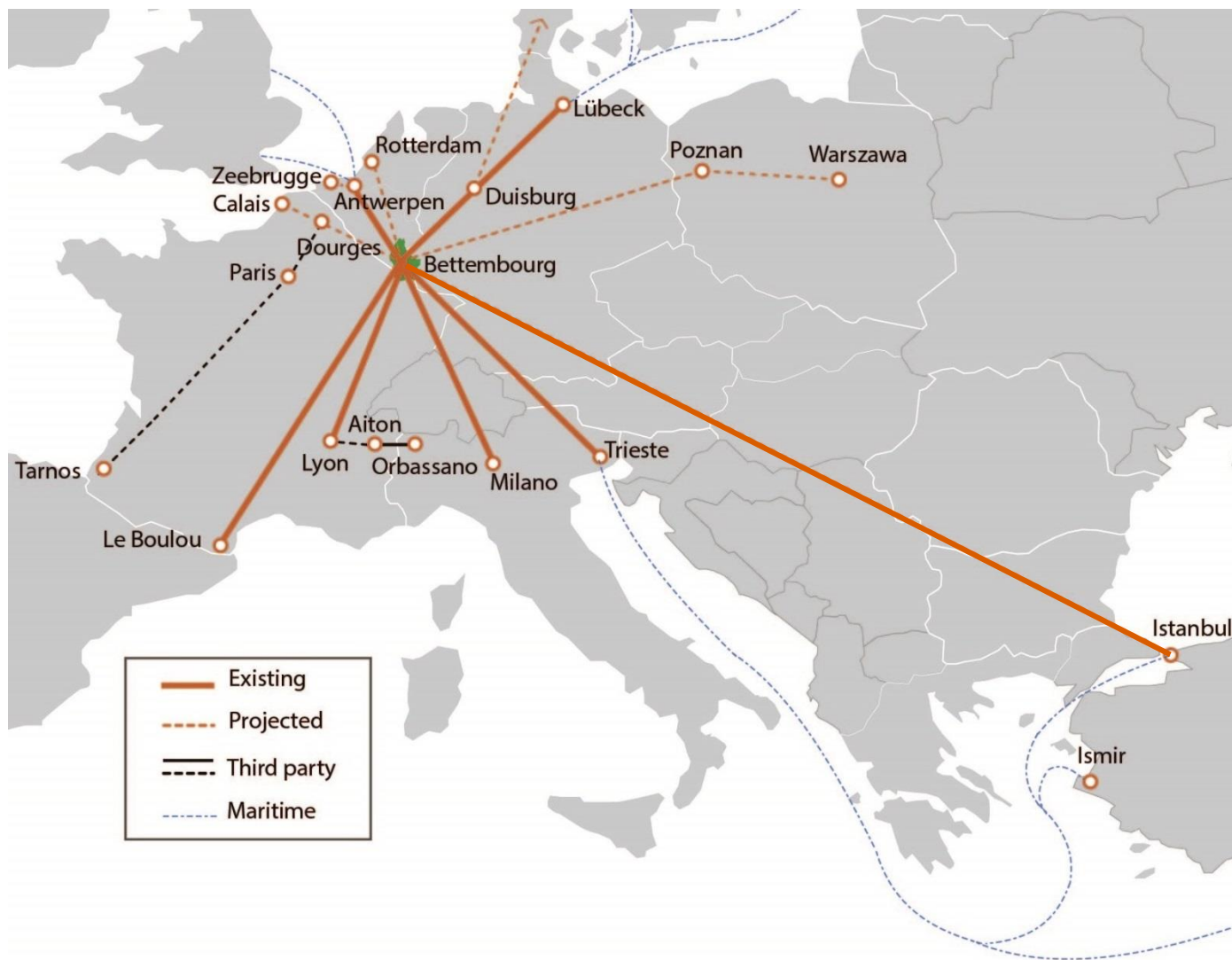
# Eurohub South Reality

**New rail Terminal:** 4x700 m rail track for 300.000 containers and 2x 700 m rail tracks for semi-trailers capacity per year



# Accessibility & Connectivity

## Rail-Road network



# Logistics Infrastructures

## New Logistics Park



① 30.000 m2 CFLmm

**completed  
2016**

② 15.000 m2 Transalliance

**completed  
2014**

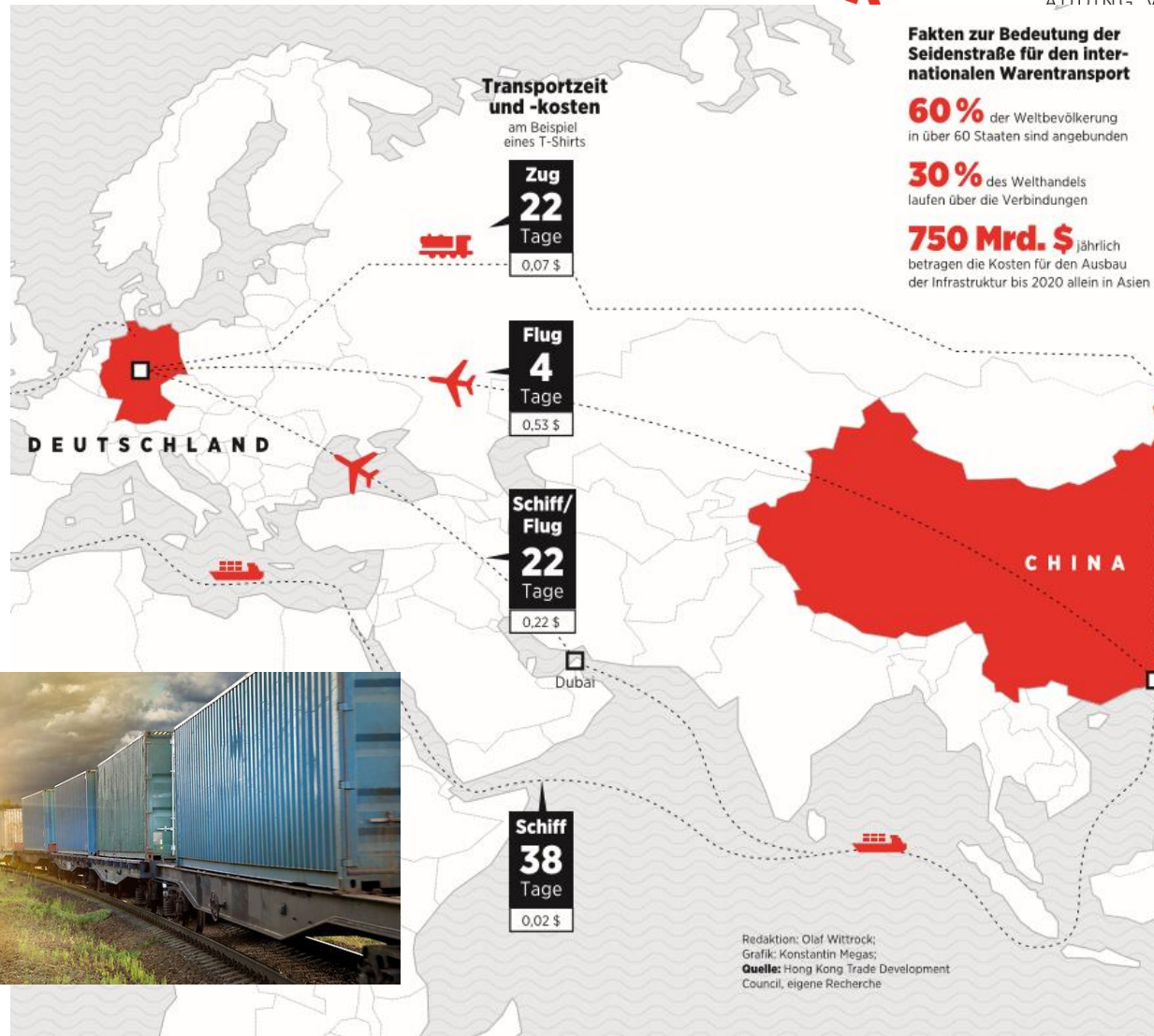
③ 3 x 26.000 m2 for  
new operators

**2017- 2018**



Portfolio has been transferred in 2016 to new Cluster member: WDP

# Create value trough new Silk road: One Belt one Road



Source Wirtschaftswoche Logistics Beilage 16.9.2016

# It's about protecting this

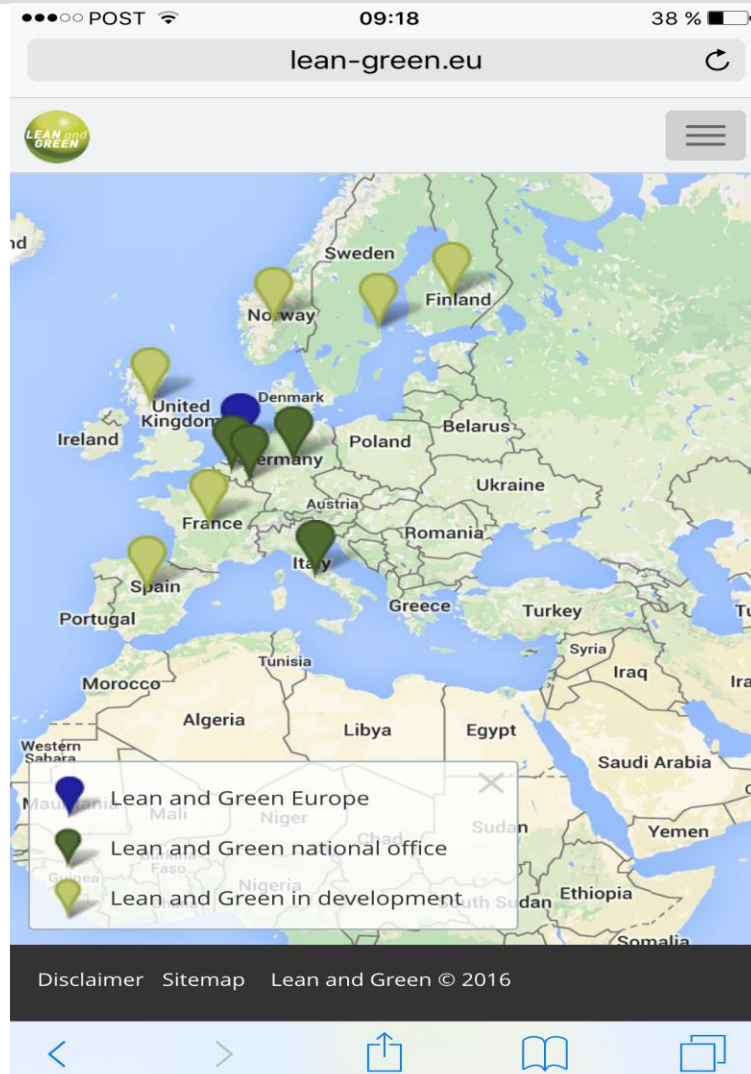


© David Doubilet National Geographic



# Lean and Green in Europe

Initiated in 2009 in the Netherlands



Lean and Green created in 2009 by Dutch (non-profit) network & foundation connekt stimulates aggressive objectives to decrease CO2 by 20% in no more than 5 years  
B,NL,Lux,D and Italy active

[www.leanandgreen.eu](http://www.leanandgreen.eu)

powered by



# Cluster Projects

## Lean & Green

- Collaboration C4L , MDDI & LIW
- 20% CO2 reduction over 5 years
- New Airline label with a reduction goal of min. 10%

- 8 companies received the award

Arthur Welter- Cargolux- GN Transport - Post – CFL Multimodal - LuxairCargo – Offergeld- Transalliance

- Next edition end 2016/2017



LE GOUVERNEMENT  
DU GRAND-DUCHÉ DE LUXEMBOURG  
Ministère du Développement durable  
et des Infrastructures

Département des transports



# European Collaborative Cluster project: Sustainable Logistics

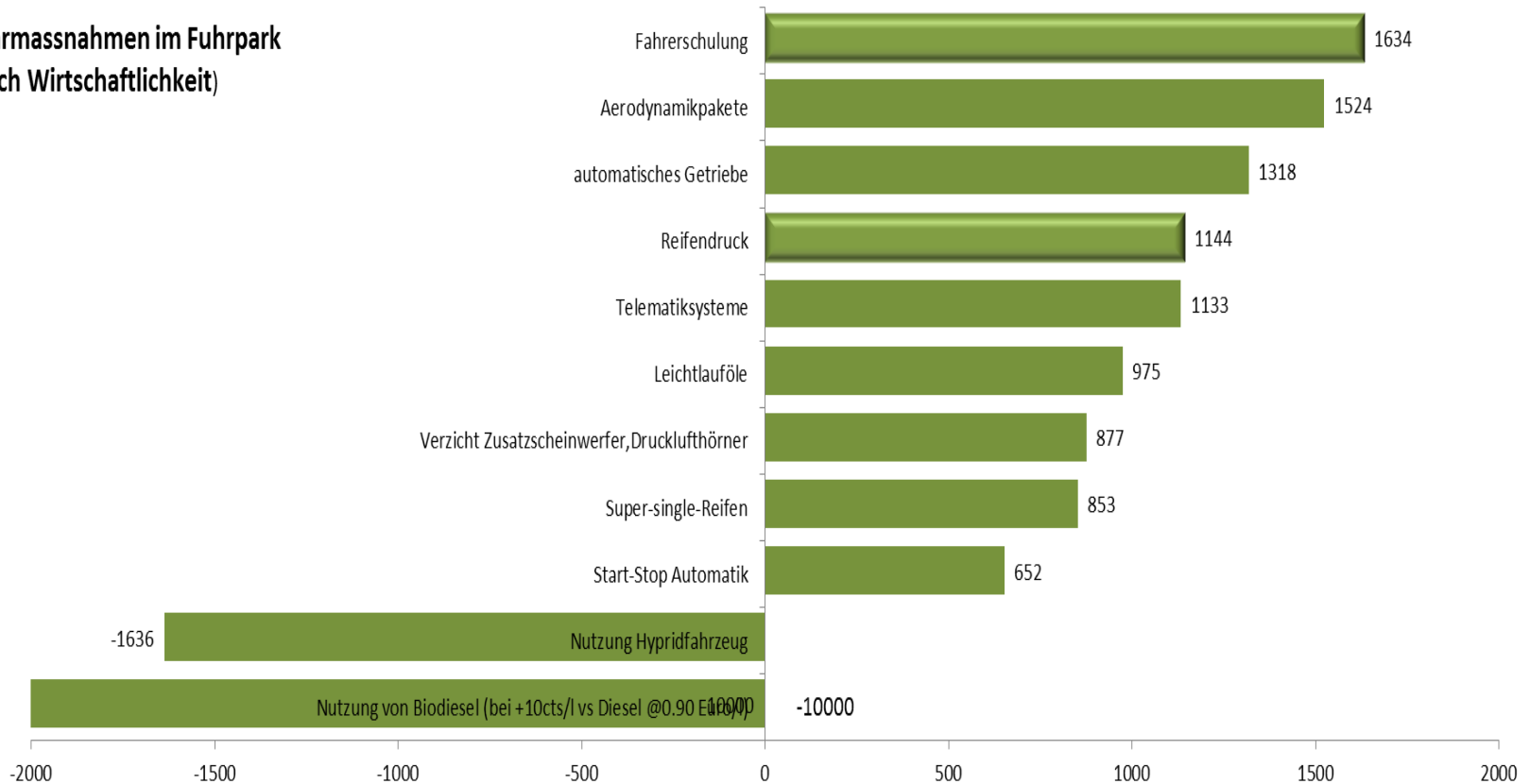
## Lean & Green



# Examples of savings in trucking

## Yearly cost savings of certain measures

### Sparmassnahmen im Fuhrpark (nach Wirtschaftlichkeit)



Jährliche Einsparung bei 0.9 EURO/l 130.000 km/LKW

Sparmassnahmen im Fuhrpark (sortiert nach Wirtschaftlichkeit) EUR

Source: Prof. Paul Wittenbrink 2009 in Leitfaden Nachhaltigkeit in der Logistik 2010

Logistik Initiative Hamburg

# Over 450 Lean+Green companies in Europe across BeNeLux, D, I

## Lean and Green label forerunners

Star  
Winners  
NL and B



**LEAN and GREEN**

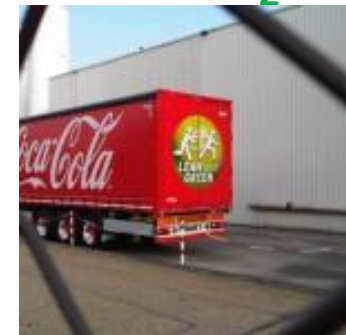
**Star Winners \*\***

**Star Winners \***

**Award Winners**

The infographic displays a large grid of logos for companies that have won Lean and Green awards. The logos are organized into three main sections: Star Winners (two stars), Star Winners (one star), and Award Winners. Each section contains a grid of various company logos, including well-known brands like Arla, Jumbo, and Heineken, as well as many smaller regional and industrial companies.

**Frontrunners (Koplopers)**  
already realized  
a total reduction of  
**more than 400.000 tons CO<sub>2</sub>**



# Air vs Road, Rail and Seafreight

Lower emissions AND lower costs?

CO<sub>2</sub>  
Savings

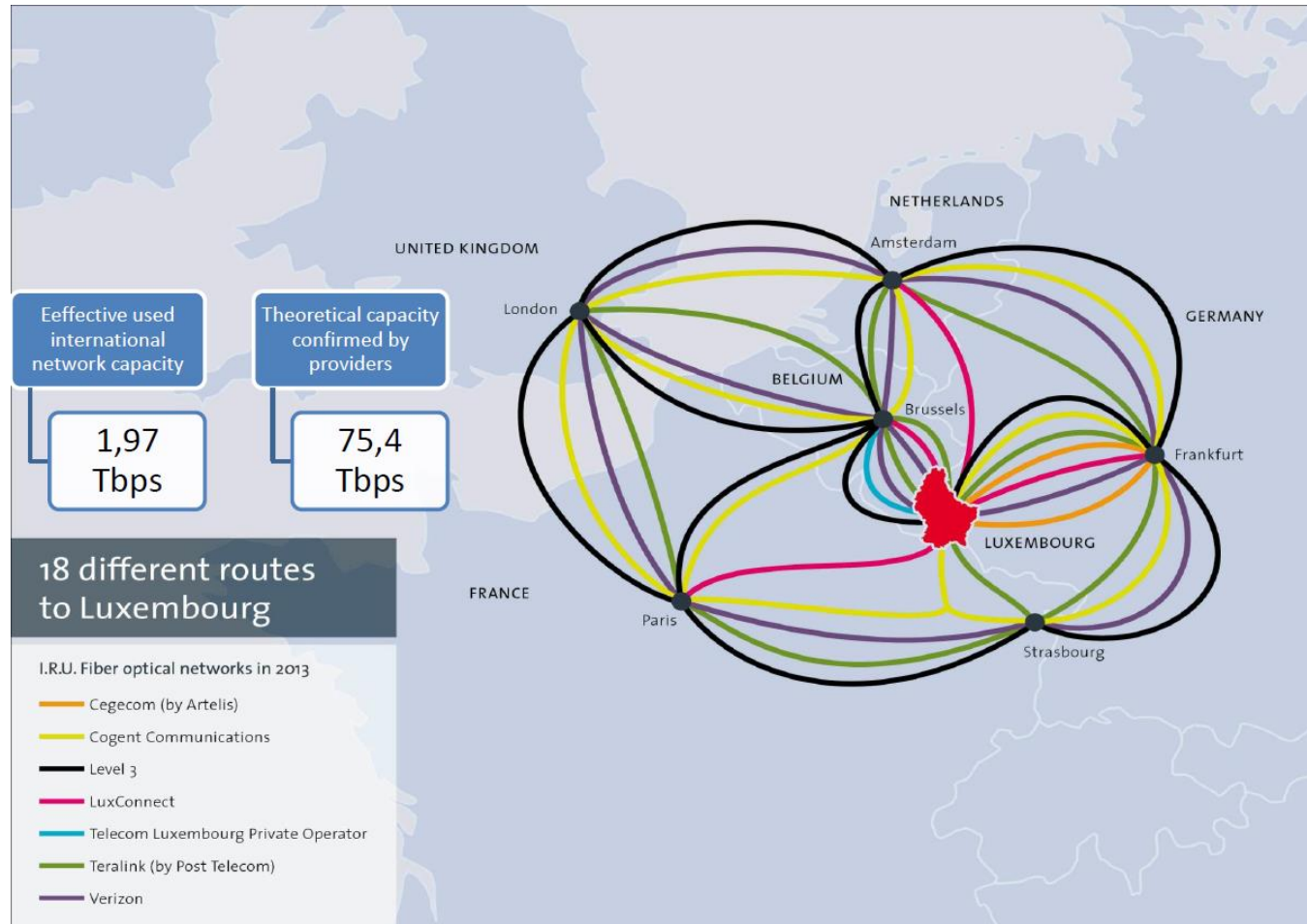


Priorities?



# How do Logistics innovate?

## Luxembourg's key asset: ITS CONNECTIVITY



Data has become the key to better services

Even virtual business models rest upon physical locations

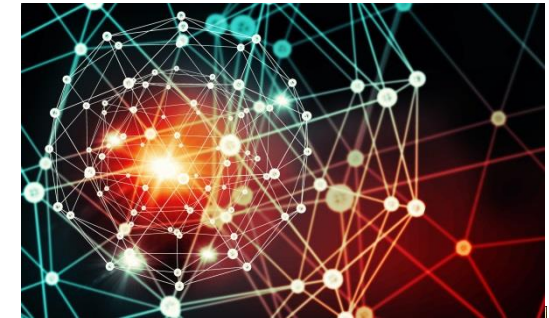
Source: Luxembourg for Business (modified)



# Consolidate freight and data through Infrastructure and IT

Luxembourg EUROHUB can play an important role in Europe as consolidation for supply chains and data as digitisation drives higher efficiency:

- » Fastest low latent time datacenters
- » Highspeed secure data networks
- » Access 40% of the EU GDP 500 km of 450 millions consumers
- » Sustainable access as Hinterland to congested North seaports
- » Attract global supply chains
- » Support industrialisation and diversification by providing performance logistics to IoT& Industrie40



## Link Central&Western Europe







**ADDING VALUE IS THE KEY**



# Contact us



Cluster for Logistics  
**Luxembourg**  
a.s.b.l.

ADDING VALUE IS THE KEY

For more information: [www.clusterforlogistics.lu](http://www.clusterforlogistics.lu)

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President

Directeur general

Chambre of  
commerce

Carlo Thelen

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# With the support of our Effective Members and Partners



LE GOUVERNEMENT  
DU GRAND-DUCHÉ DE LUXEMBOURG  
Ministère du Développement durable  
et des Infrastructures



LE GOUVERNEMENT  
DU GRAND-DUCHÉ DE LUXEMBOURG  
Ministère de l'Économie  
et du Commerce extérieur



The **Luxembourg Ardennes** offer exceptional hiking trails through beautiful forests and picturesque villages.

The **Land of the Red Rocks** has established a new identity through combining ancient and new technologies.



Often referred to as the **Little Switzerland of Luxembourg**, **Mullerthal** owes its name to its hilly landscape reminiscent of Switzerland which attract many tourists.

The **Moselle Region**, named after river, harbours beautiful valleys, famous for their wineries, charming hotels and medieval towns.



# LOGISTIQUE

AU GRAND DUCHÉ DU LUXEMBOURG



## COMPARAISON

	Luxembourg	UE
Contribution PIB:	7,4%	4,6%
Revenus annuels (mrd €):	3,8	930
Employés:	13 000 soit 4,5% de l'emploi total	11 millions soit 4,3% de l'emploi total
Entreprises:	800 dont 408 actives à l'international	Plus de 570 000 (actives)

Source : Contribution européenne, Eurostat et Eurostat, Eurostat et Statist.

## 8° PAYS

Le plus performant en matière de logistique (Logistics Performance Index 2014, Banque Mondiale)

Depuis 2013 :  
**100 000 m²**  
de surfaces logistiques en cours d'achèvement

**135 millions d'euros**  
d'investissement d'entreprises



### MARITIME

Le Luxembourg est à moins de 500 km des ports de Rotterdam, Anvers et Zeebrugge.

**295**  
entreprises maritimes

**224**  
navires battant pavillon luxembourgeois

**1 000**  
emplois

**4 millions t.**  
de marchandises

### FLUVIAL

**PORT DE MERTERT**  
(transport fluvial, routier, rail et aérien)

**3,3 km**

**65 ha**

**1,2 millions t.**  
de marchandises transportées



### RAIL

**274 km**  
de rails

**125 000**  
conteneurs

**5 millions t.**  
de marchandises transportées



### ROUTE

**5 200 km**  
de routes  
(dont 147 km d'autoroutes)

**5 300**  
entreprises

**58,8 millions t.**  
de marchandises transportées  
(dont 30 millions t.  
à l'international)

**1,5 millions**  
de camions en transit par an  
(actifs)



### AÉRIEN

**7°**  
aéroport de fret en Europe

**85 500 m²**  
de capacité d'entrepôts  
(dont 3 000 m² pour le secteur  
pharmaceutique)

**775 000 t.**  
de marchandises transportées