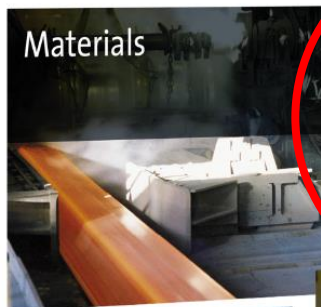
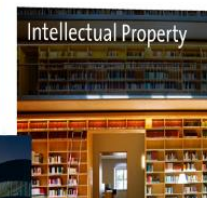


Luxembourg, a small country with large opportunities

..in Logistics??

Reliable Logistics in the Green Center of Europe  
November 2016

# Logistics plays important role in diversification strategy



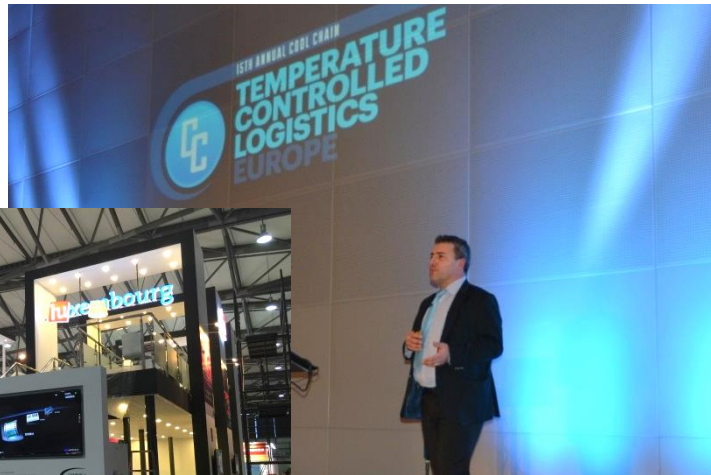


# The Cluster for Logistics

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

Mission: **support Luxembourg's strategy to reinforce the sector.**

The Cluster focuses on **shippers and logistics companies** but also welcomes all companies or 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 a 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 Gossypol Vision

## ICT, MEDIA, FOOD, E-COMMERCE


 **RTL**  
GROUP the leading Euro

**FERRERO**

  
**SES**  
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, mit no bei sich

  
**arendt**  
arnes & mederach

**Deutsche Bank** 

  
**pwc**

## EUROPEAN INSTITUTIONS



  
**eurostat**

  
EUROPEAN INVESTMENT BANK

 **European**  
**Investment**  
**Bank**

  
EUROPEAN COMMISSION

  
**ESM**



# ID CARD LOGISTICS

## A COMPLETE OFFER



### COMPANIES

**800**

Companies

Many international logistics companies have an international hub in Luxembourg

### EMPLOYMENT

**12,500**

Direct jobs

3.6 percent of the entire workforce

### ANNUAL REVENUES

**3,8 Mrd. Euro**

2015 estimate

7.4 % of GNP

### RELEVANT RANKINGS

Logistics Performance Index - Rank 2

1st Country without Sea Harbour

IMD Competitiveness Index

6th Economy global  
1st Economy Europe

### OUTSTANDING HUBS

- Multimodal Bettembourg South hub
- Airfreight Findel airport
- Riverport Merttert
- Freeport Findel



# Logistics Hub Luxembourg strategically positionned 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



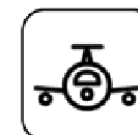
Benelux 2011: **6.0%** rail freight  
transport in/from/to Benelux of  
EU-28



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 Napoli

In comparison with Naples



## Luxembourg

2.586 km<sup>2</sup>

0,563 Mio inh

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

49 Mrd. EUR  
(BIP) 2014

## Napoli

117.3 km<sup>2</sup>  
Metro  
1,1171 km<sup>2</sup>

0.973 Mio inh  
(3.7 Urban)

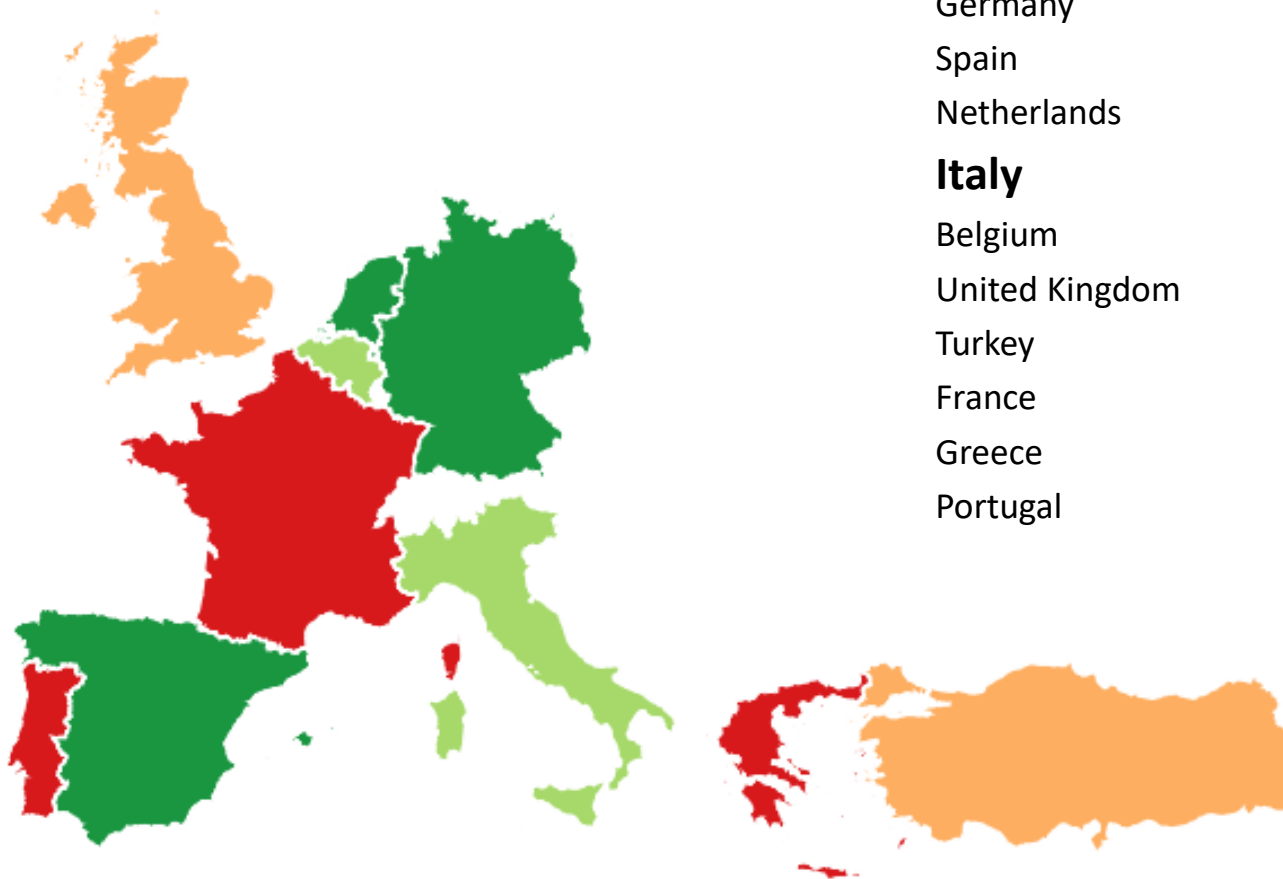
3,600 inh / km<sup>2</sup>  
(711 EW/km<sup>2</sup>)

76.7 bn EUR  
GDP 2011



## Top 10 Maritime Traffic of containers (in TEU) 2014 + 2015

Total 176,338,529 TEU Sum 2014 and 2015



Zone	Mar. Traf. of containers in TEU 2014+2015
Germany	30,832,576
Spain	28,571,142
Netherlands	23,458,828
<b>Italy</b>	<b>20,021,728</b>
Belgium	19,501,992
United Kingdom	18,282,130
Turkey	13,586,690
France	8,748,430
Greece	7,990,748
Portugal	5,344,265

## Top 10 Ports in Italy for maritime Traffic of containers (in TEU) 2015

**Total 9,774,376 TEU 2015 Napoli No 7 in containers**



Zone	Mar. Traf. of containers in TEU
Port of Gioia Tauro	3,385,778
Port of Genoa	1,953,918
Port of La Spezia	1,289,023
Port of Cagliari	746,529
Port of Trieste	548,741
Port of Livorno	509,773
<b>Napoli</b>	<b>378,980</b>
Venezia	204,828
Port of Ancona	195,673
Port of Ravenna	169,078



## 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

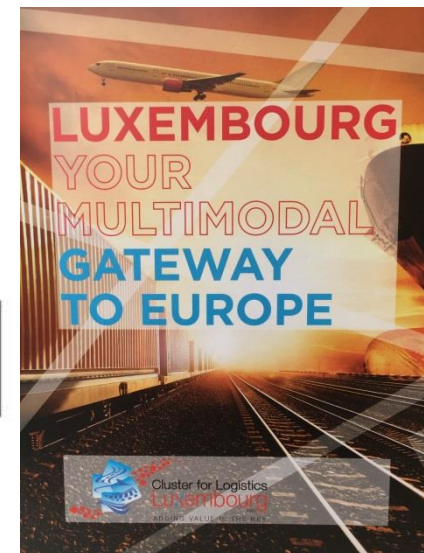


N = 160 pays au classement Banque mondiale 2016

**New Challenge stay on LPI Podium**

# Quadrimodal Logistics Infrastructures

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





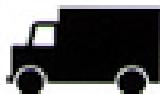
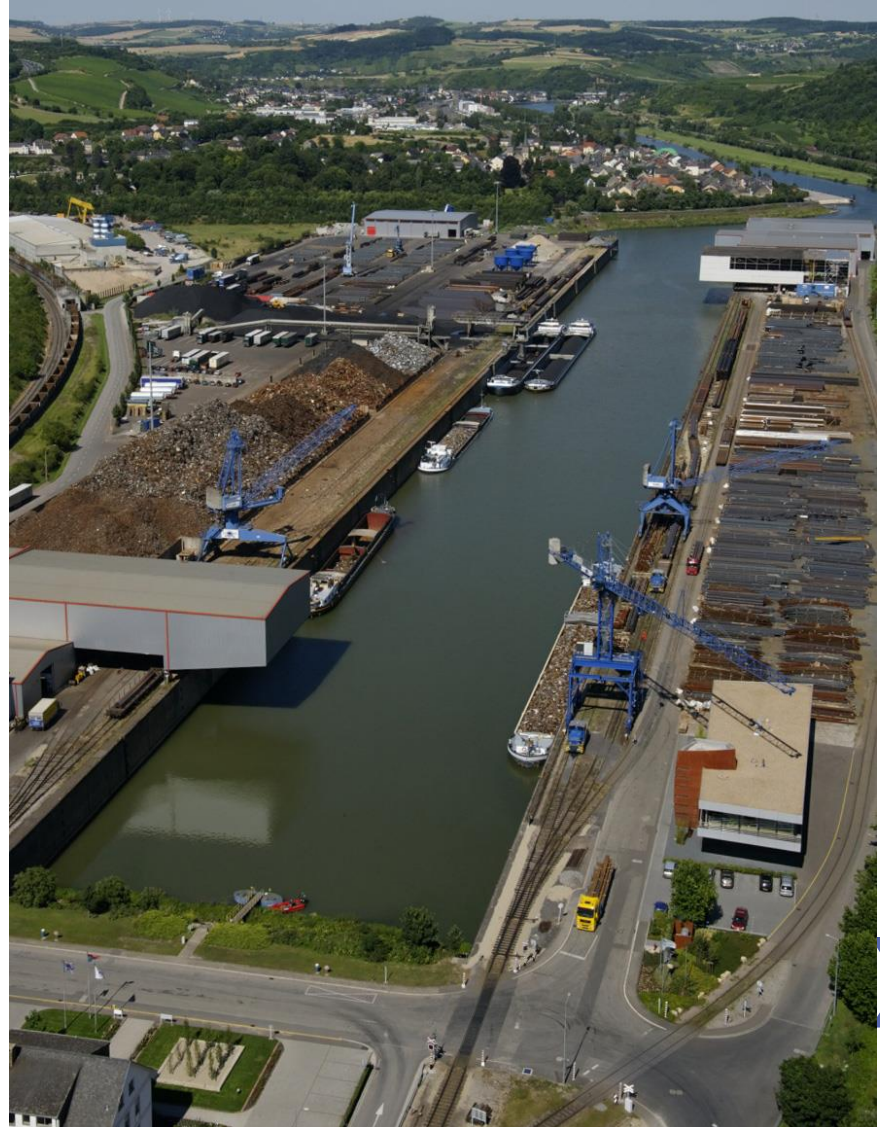
# Logistics Infrastructures

## 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.

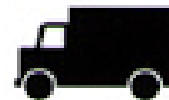


# Logistics Infrastructures

## Rail Road Hub Bettembourg

### New combined rail Terminal:

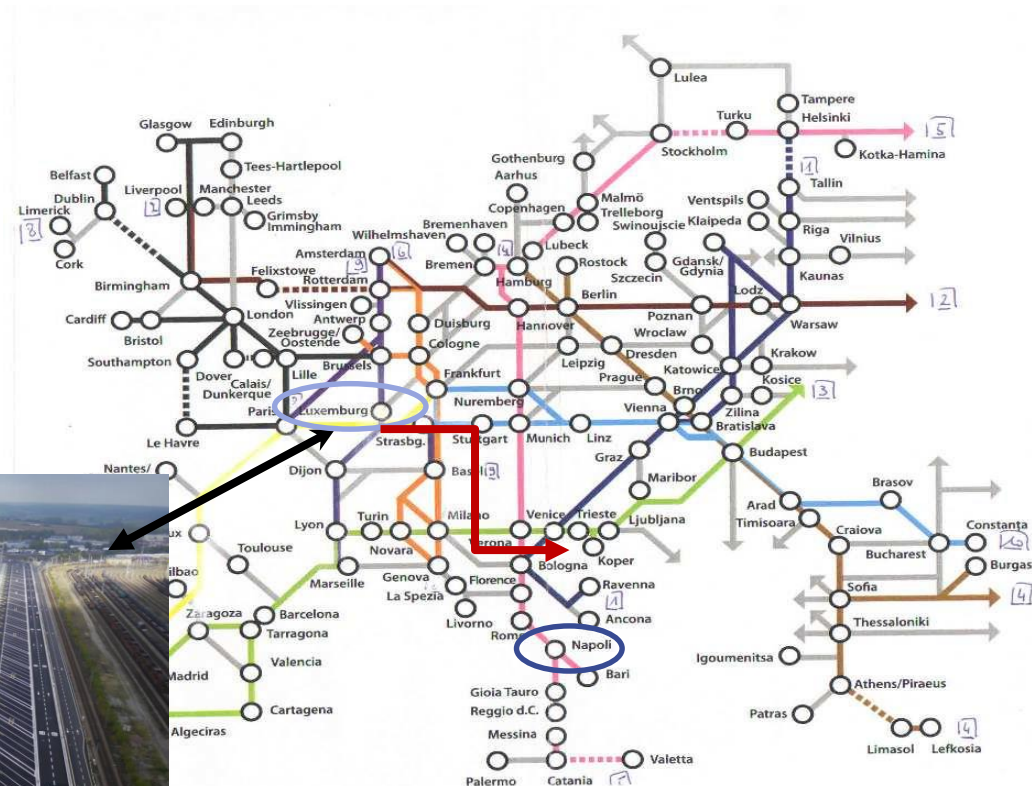
- 4x700 m rail track for 300.000 containers and
- 2x 700 m rail tracks for semi-trailers capacity per year
- Combined train connections to Antwerp, Lübeck, Helsingborg, Le Boulou, Milan and Turkey
- Conventional rail freight services for international, regional & local customers
- Daily connections to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



# 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

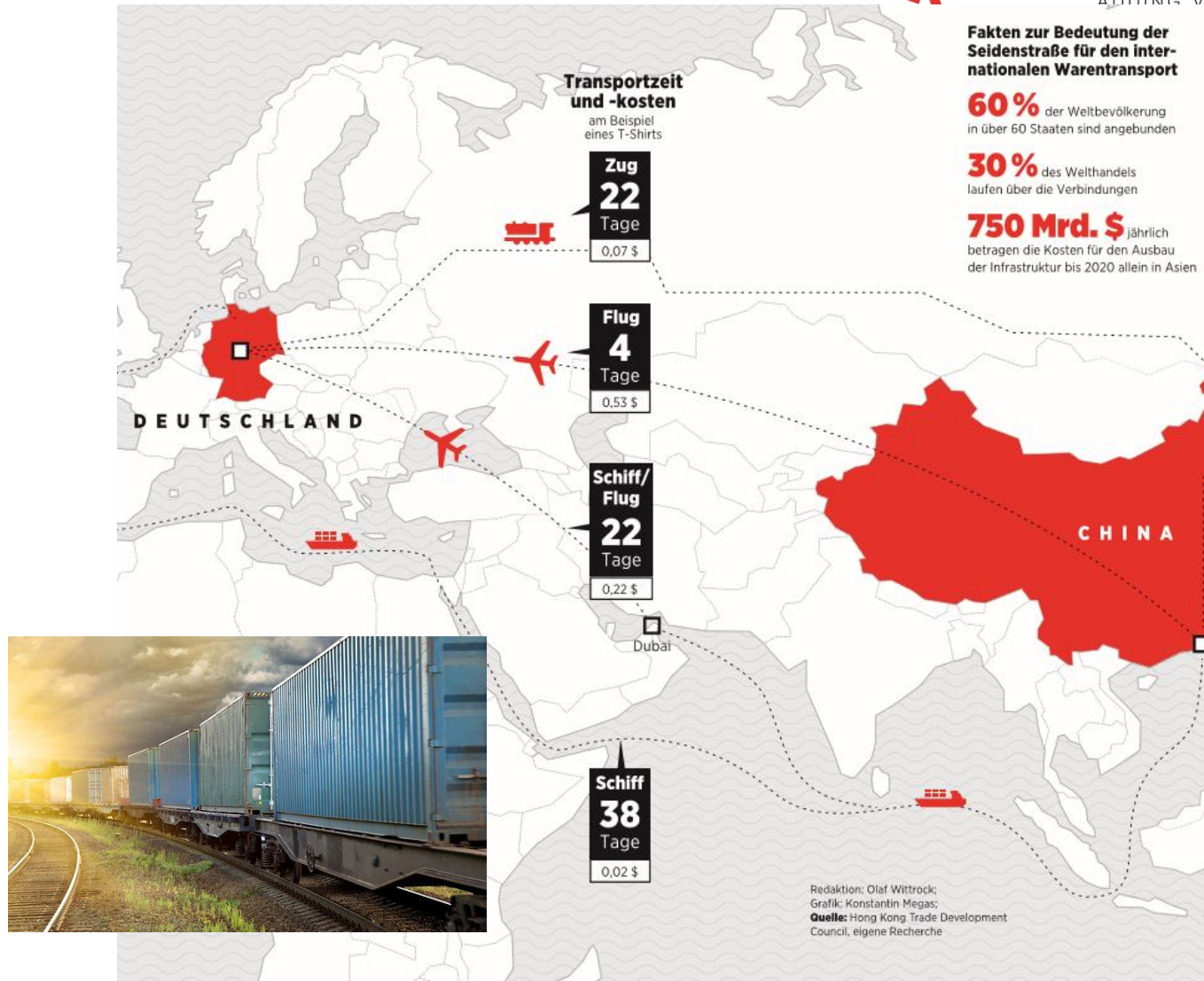
**2017- 2018**



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



# Create value trough new Silk road: One road one belt

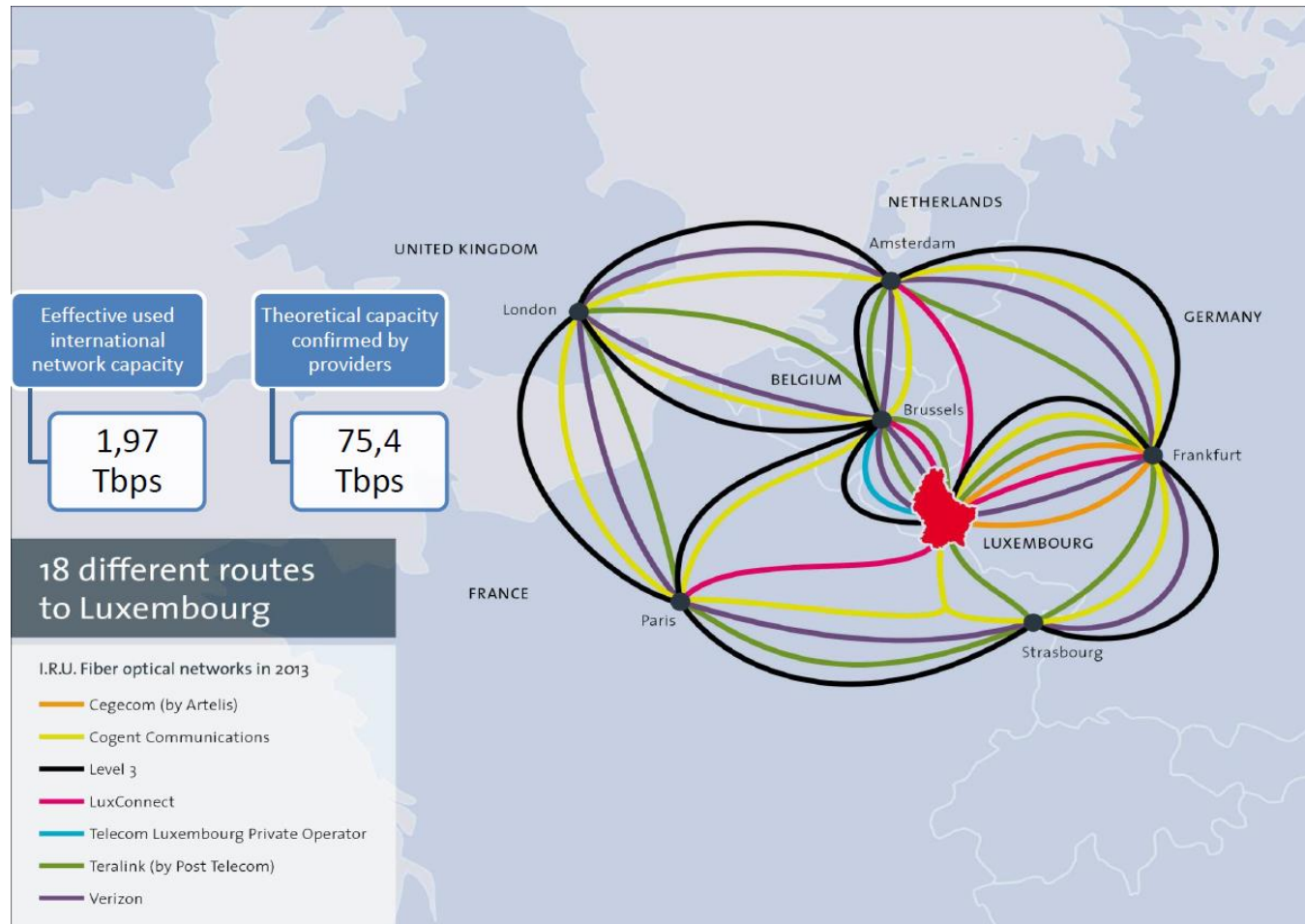


Source Wirtschaftswoche Logistics Beilage 16.9.2016



# 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**

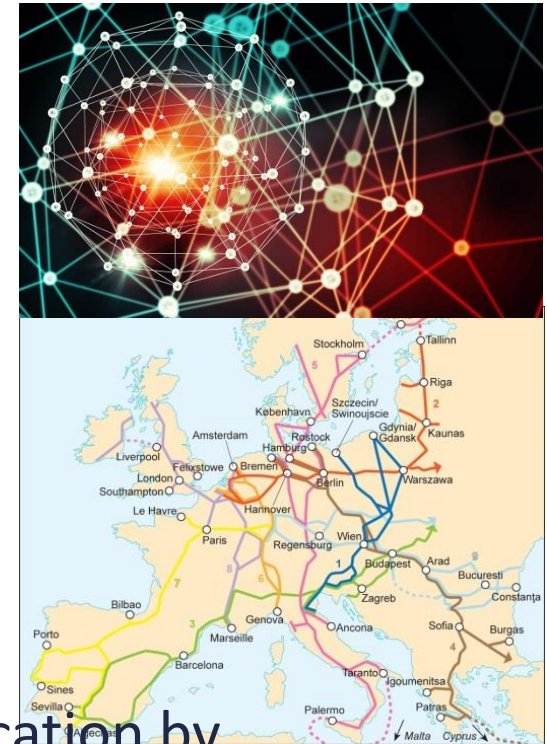
Source: Luxembourg for Business (modified)



# 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



**Therefore - Logistics in Luxembourg!**

# Contact us



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

ADDING VALUE IS THE KEY

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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