

A large, stylized, light yellow 'R' logo that spans the left side of the slide, serving as a background element.

LUXREAL

Real Estate Association of Luxembourg a.s.b.l.

LuxReal Logistics Forum
27th of October 2016



Welcome

Xavier Hauboldt

Vice President at LuxReal



Agenda

- 06.30 p.m. Peter Cassells
Senior Vice President, FCA at Prologis
- 06.45 p.m. Paul Feider
Directeur administratif, commercial et financier à Félix Giorgetti Sàrl
Sibrand van Roijen
Commercial Development & Finance. Advisor to the Board of Directors at
Félix Giorgetti Sàrl
- 07.00 p.m. Emmanuel Louis
Directeur de Projets Stratégiques et du Bureau d'Etudes
- 07.15 p.m. Malik Zeniti
Senior Manager – Cluster for Logistics
- 07.30 p.m. Q & A
Moderator:
Sibrand van Roijen, LuxReal board member
- 08.00 p.m. Cocktail Reception



The European context of Logistics

Peter Cassells
Senior Vice President, FCA at Prologis

The European Context of Logistics

Peter Cassells, Prologis



Who – or What – is Prologis?



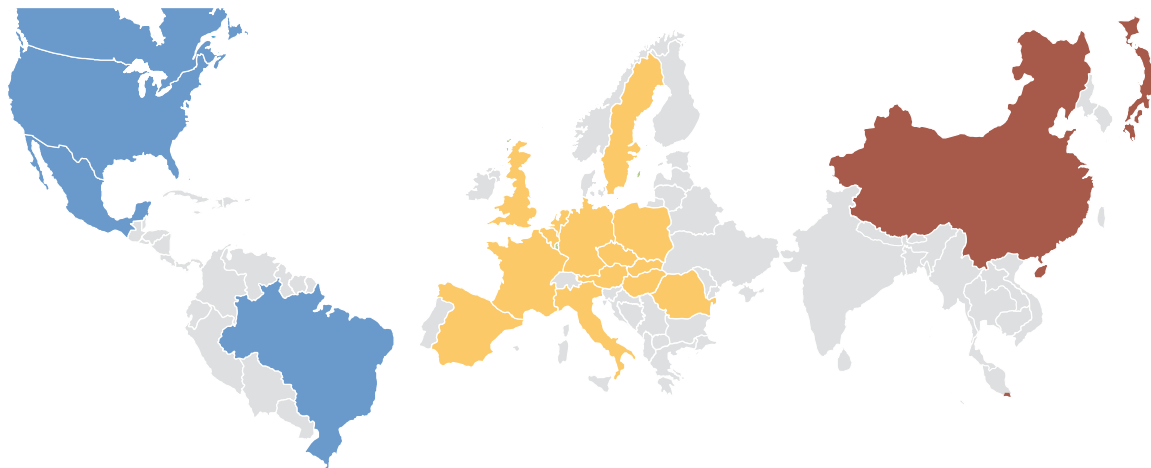
Prologis at a Glance

Leading Owner / Operator

- €58.6 billion AUM
- Focused on logistics real estate
- NYSE: PLD
- 62 million square metres (over 660 million square feet)
- Active in 20 countries on four continents
- More than 3,300 facilities
- Platform covers countries representing ~70% of global GDP⁽¹⁾
- Over 1,500 colleagues serve a diverse base of 5,200 customers

Strategic Capital





















- €35.7 billion AUM in 11 significant co-investment ventures;⁽²⁾ broad risk / return spectrum
- 30-year proven track record
- Typically a 15%-65% co-investment alongside partners



	Americas	Europe	Asia	Total
Total Portfolio⁽³⁾ – Square Metres	40	17	5	62
Regional Employees	950	364	268	1,582
Co-Investment Ventures	5	4	2	11

USD basis, International Monetary Fund data
AUM is fair value of real estate plus investment capacity
Comprises operating, development and other portfolio

Our largest customers

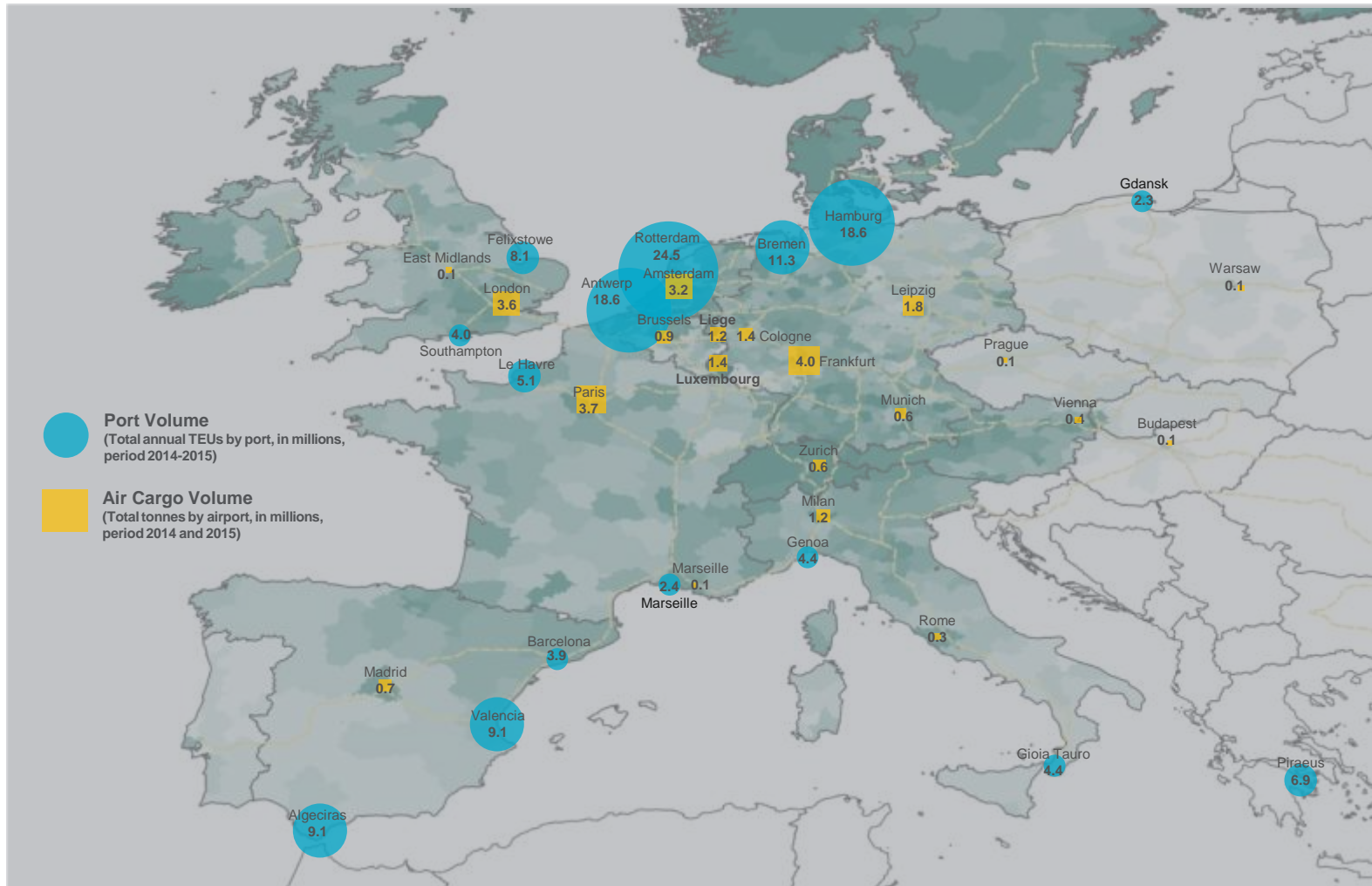
 <p>33 leases, 4 countries, 21 markets</p>	 <p>86 leases, 15 countries, 39 markets</p>	 <p>38 leases, 11 countries, 24 markets</p>	 <p>33 leases, 11 countries, 23 markets</p>	 <p>40 leases, 9 countries, 23 markets</p>
 <p>15 leases, 1 country, 10 markets</p>	 <p>57 leases, 8 countries, 33 markets</p>	 <p>10 leases, 5 countries, 6 markets</p>	 <p>10 leases, 1 country, 6 markets</p>	 <p>34 leases, 10 countries, 18 markets</p>
 <p>28 leases, 6 countries, 17 markets</p>	 <p>13 leases, 5 countries, 10 markets</p>	 <p>8 leases, 3 countries, 4 markets</p>	 <p>8 leases, 5 countries, 6 markets</p>	 <p>36 leases, 4 countries, 18 markets</p>
 <p>31 leases, 3 countries, 12 markets</p>	 <p>14 leases, 5 countries, 11 markets</p>	 <p>7 leases, 4 countries, 6 markets</p>	 <p>28 leases, 6 countries, 8 markets</p>	 <p>25 leases, 1 country, 9 markets</p>

As of February 18, 2016

Customers

Rise of Trade - Air and Ocean Gateways Infrastructure

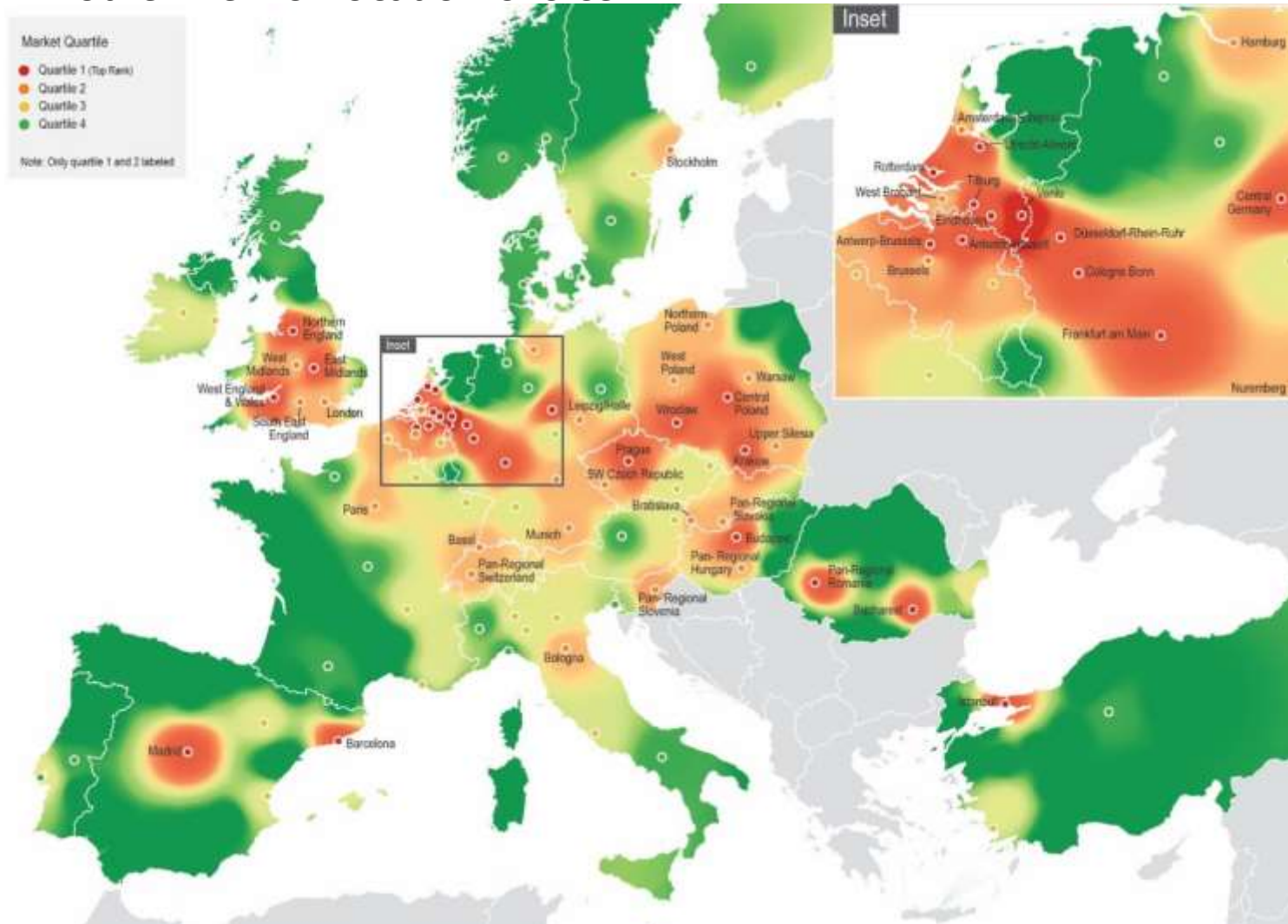
One view of location choice



Source: Oxford 2016 estimates, Various Port Authorities, ESPO, Various Airport Authorities, Airports Council International, Prologis Research

Logistics Hotspots and Corridors

Another view of location choice



Source: Prologis Research

Evolving Customer Requirements



**Building-
feature
evolution
occurring at
gradual pace**

Exterior

- Building and unit size
- Truck court depth and circulation
- Truck and car parking

Interior

- Building and unit size
- Dock door ratio
- Floor load and flatness
- Column spacing
- Clear heights
- Sprinkler system

Sustainability

- Energy efficiency
- Water efficiency
- Smarter commuting
- Improved user awareness and behavior

Evolution of Requirements Over Time

Legacy Warehouse

North of Paris, built pre 1990



Prior Cycle Warehouse

Evry DC4 in Paris, built 2004



Current Cycle Warehouse

Meaux DC5 in Paris, built in 2015



Exterior

- Building and unit size
- Truck court depth and circulation
- Truck and car parking

Note: Photos in same scale

Evolution of Requirements Over Time

Legacy Warehouse



Prior and Current Cycle Warehouse



Interior

- Dock door ratio
- Floor load and flatness
- Column spacing
- Clear heights
- Sprinkler system

Evolution of Requirements – More Recent Developments

Energy Savings

Retrofit LED lightning existing warehouse



Water Savings

Drought tolerant landscaping



General Cost Savings

Car sharing in the UK



Sustainability

- Energy efficiency
 - LED, skylights and building insulation
- Water efficiency
- Smarter commuting
- Improved user awareness and behavior

Alternative Warehouse Designs

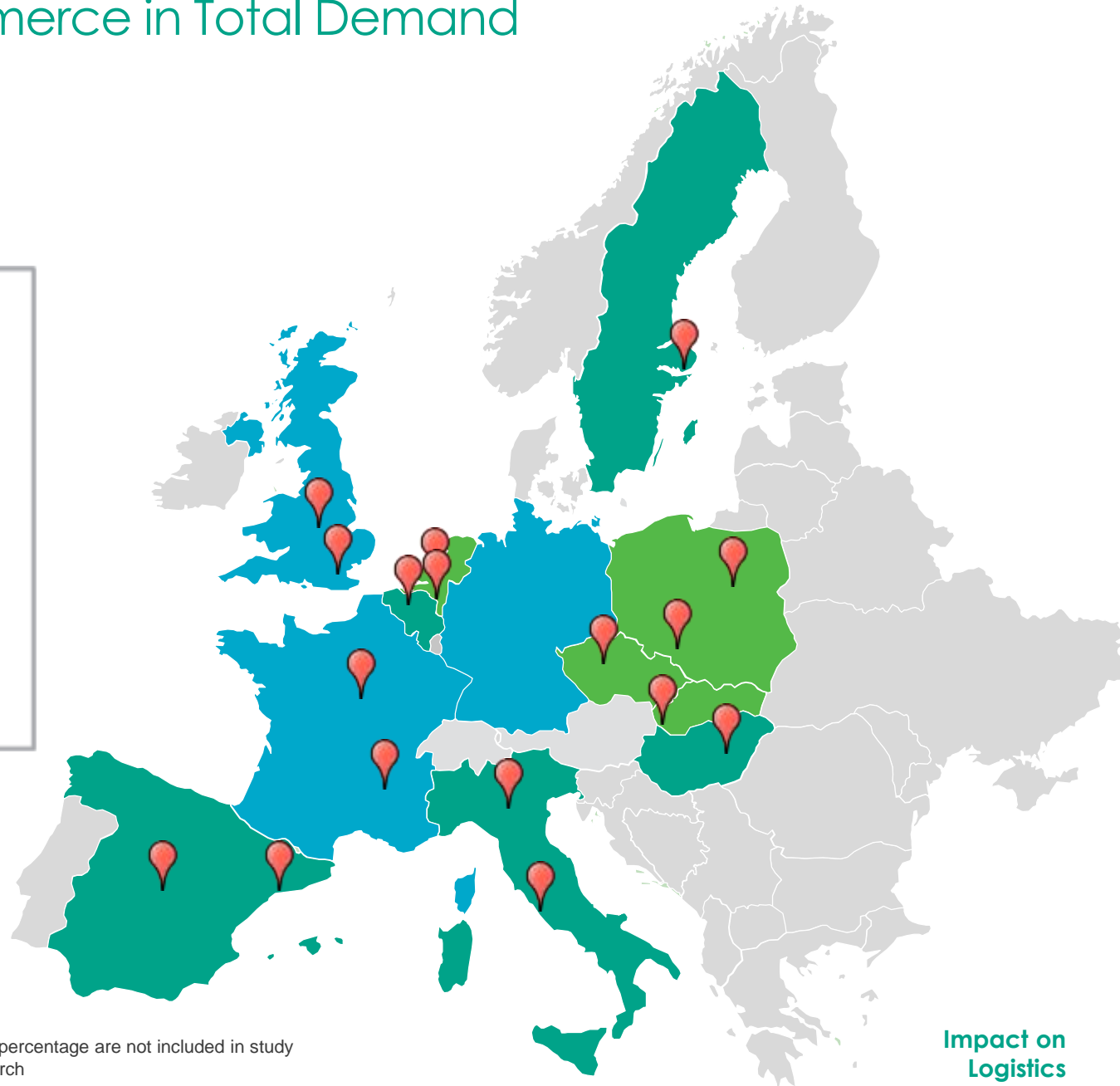
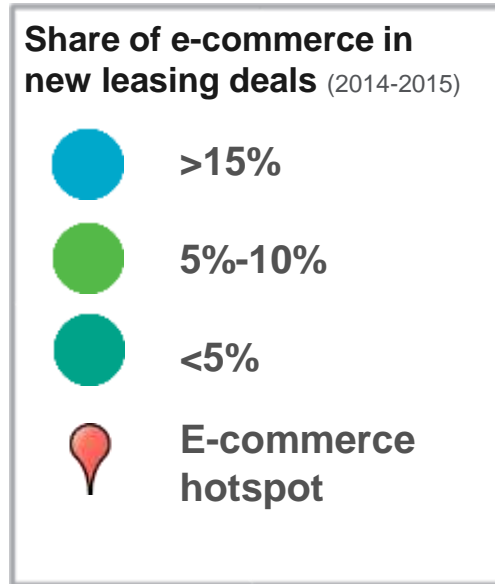
What to do where land is scarce and expensive



E-Commerce – its Impact on Logistics Operations



Share of E-Commerce in Total Demand



Note: countries with no percentage are not included in study
Source: Prologis Research

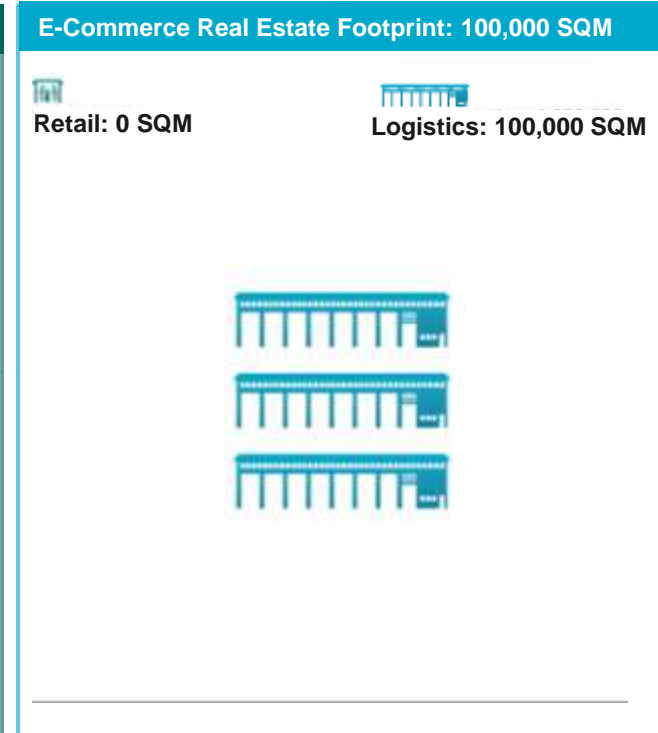
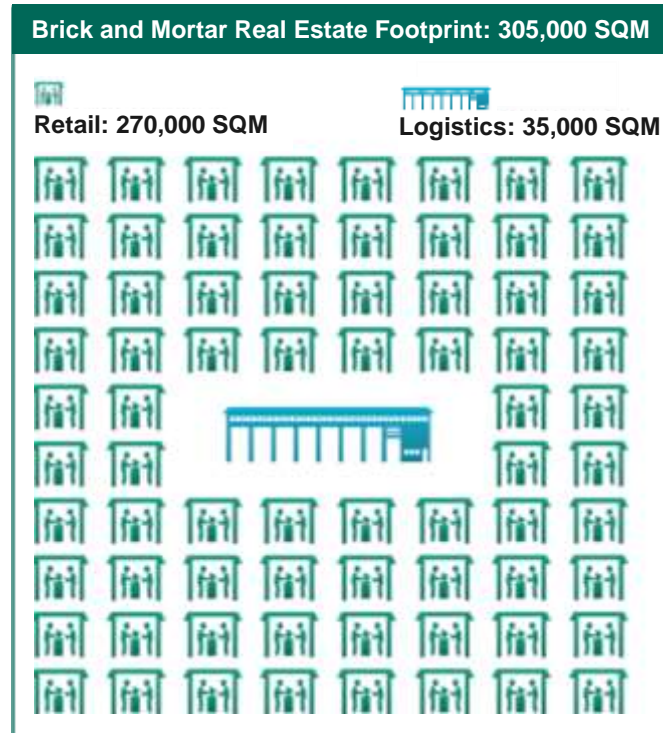
**Impact on
Logistics**

Intensive Users of Logistics Facilities

Why are E-tailers intensive users?

- Higher product variety
- Greater inventory levels of each product
- Individual B2C shipping
- Reverse logistics (processing returned items)

How Much Real Estate Does a €1B Retailer Need?

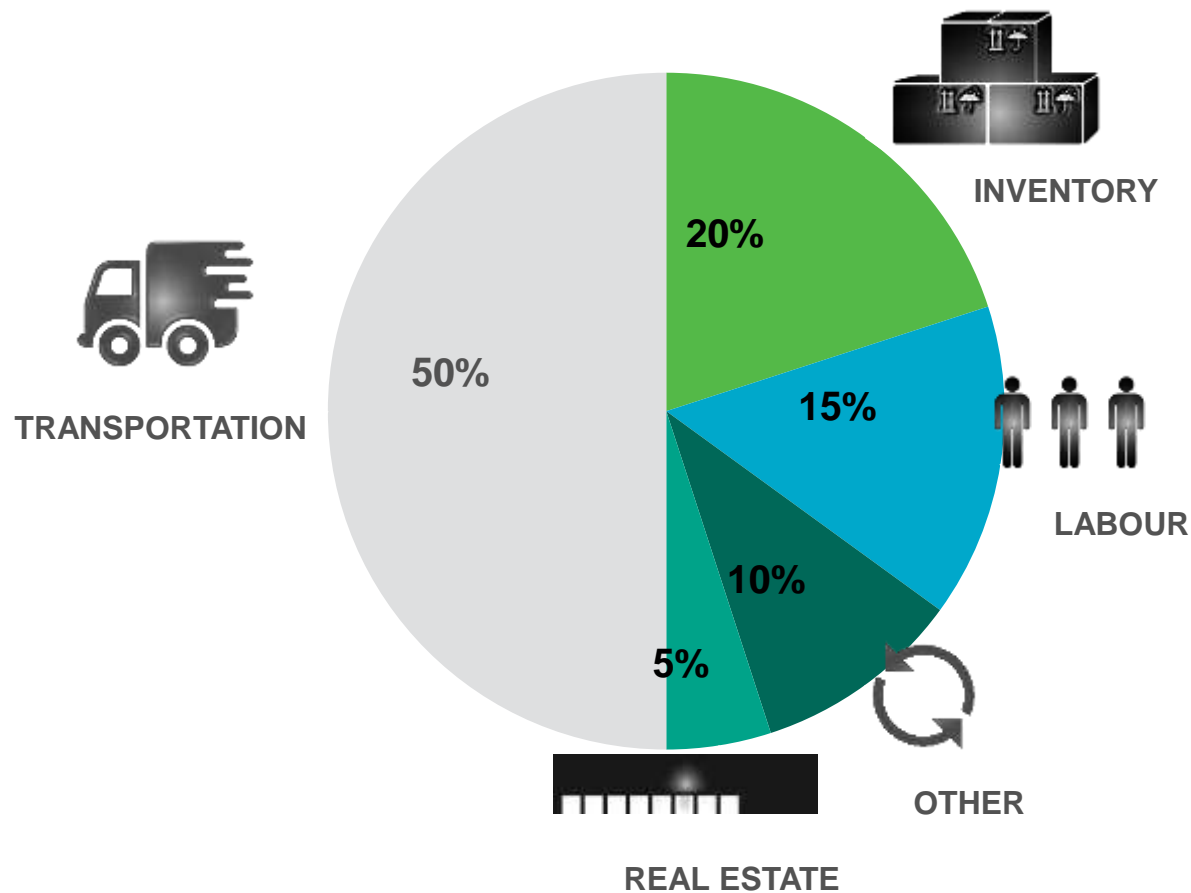


Source: Prologis Research

Impact on
Logistics

Profit Margins Drive Supply Chain Efficiency

Total Supply Chain Costs Breakdown, Industry Average

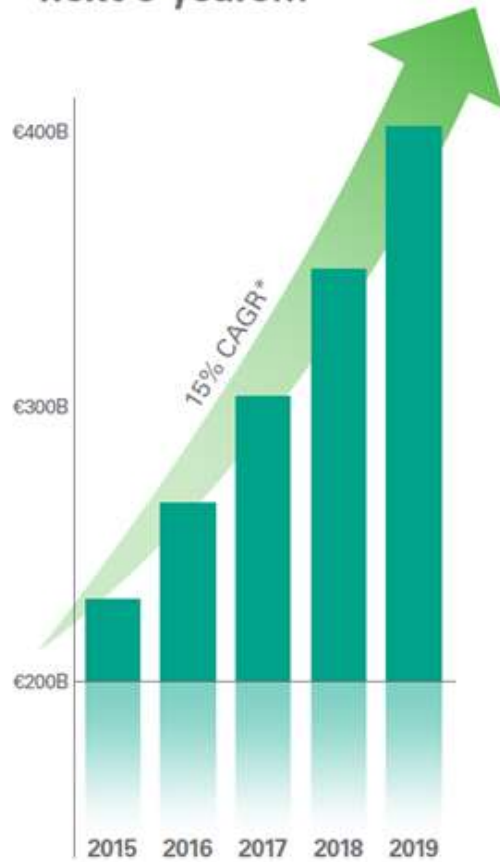


Source: CBRE Supply Chain Services

Impact on
Logistics

Growth in E-Commerce...

**E-commerce growth
in Europe over the
next 5 years...**



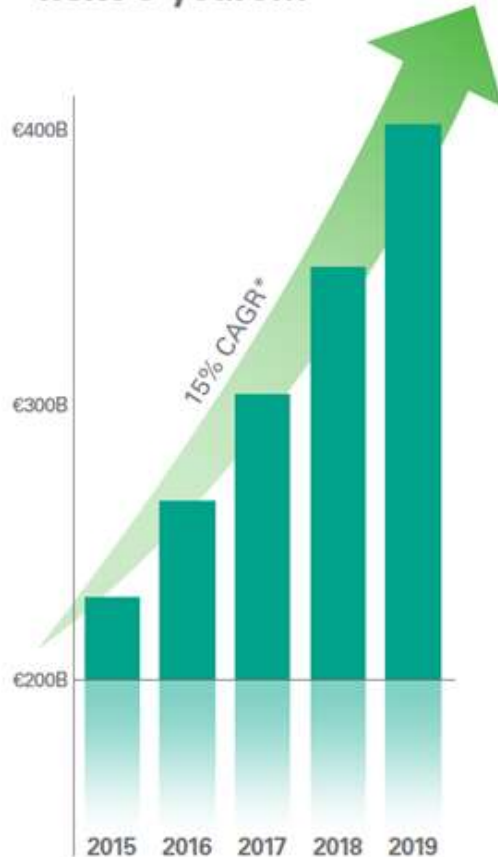
* Source: E-commerce Europe, Goldman Sachs

Source: Prologis Research

Outlook

Growth in E-Commerce is Driving Demand...

E-commerce growth
in Europe over the
next 5 years...



* Source: E-commerce Europe, Goldman Sachs

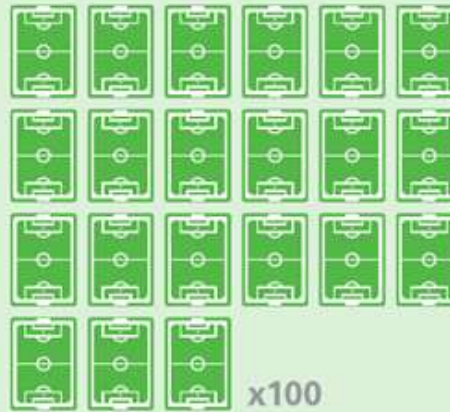
=

15
million square
meters

of new
e-fulfillment
facilities...



...or the
equivalent of **2100** football
pitches*



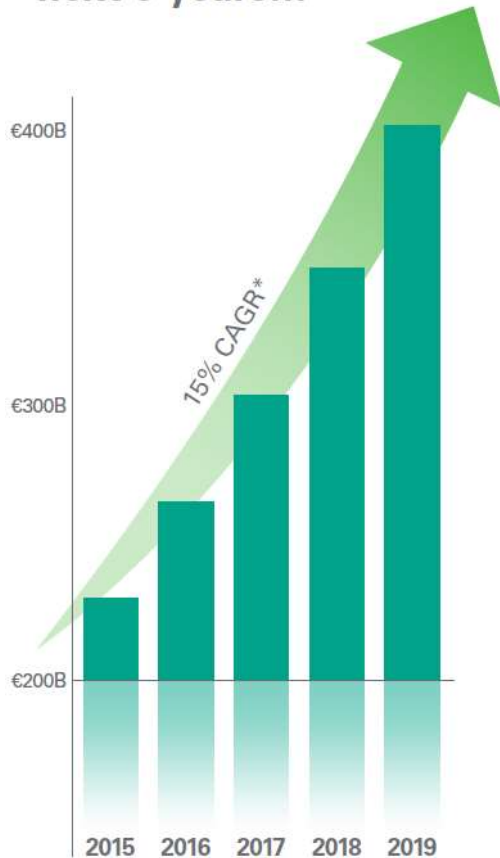
For each **€1B** in new e-commerce sales,
Europe needs to add **77,000** square
meters of new e-fulfillment facility space.

* Source: <http://www.bbc.co.uk/guides/zcknyrd> (Wembley Stadium)

Source: Prologis Research

Growth in E-Commerce is Driving Demand and Job Growth

E-commerce growth
in Europe over the
next 5 years...



* Source: E-commerce Europe, Goldman Sachs

= **15**
million square
meters of new
e-fulfillment
facilities... =



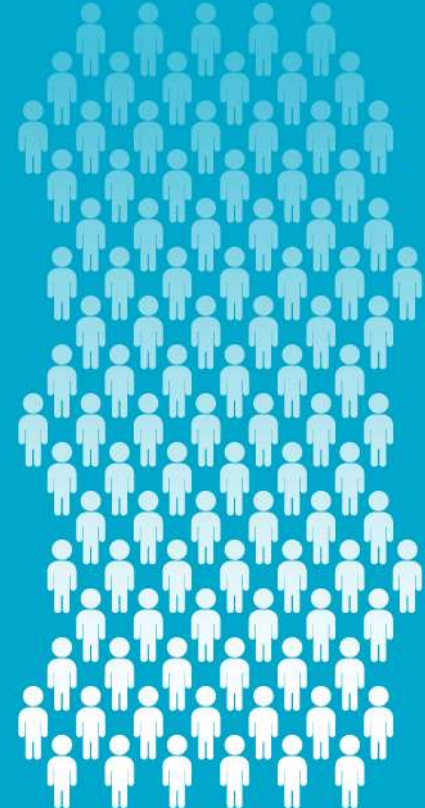
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* Source: <http://www.bbc.co.uk/guides/zcknyrd> (Wembley Stadium)

Approximately
200,000
new jobs are required
to staff these facilities, or...



...100 jobs each day!

Source: Prologis Research

Outlook

Is E-Commerce a Game-Changer for Logistics Real Estate?

- Yes, it's fueling logistics demand and pushing efficiency improvements across the supply chain
- But, most demand can be met by current logistics real estate product
- Looking ahead, E-Commerce will continue to grow as it matures into an established retail channel
- The rise of E-Commerce will enhance the drive for efficiency, resulting in:
 - Increased demand for warehouses close to population centers - urban logistics
 - With regional hubs that service smaller urban warehouses, and
 - Being a positive influence on job creation.

Conclusion



Thank-you

• Conclusion



The construction of the Eurohub Bettembourg

Paul Feider

Directeur administratif, commercial et financier à Félix
Giorgetti Sàrl

Sibrand van Roijen

Commercial Development & Finance. Advisor to the
Board of Directors at Félix Giorgetti Sàrl



Offices



Road construction



Earthworks



Public buildings



Housing



General construction company:
Development, management, construction &
promotion of construction and real estate
projects

Staff: ± 530 employees and
145 interims

Certifié ISO 9001 : 2008

Affiliated operating companies



Construction, real estate, façades, civil engineering
Staff: 235 persons



Sale and hire of Liebherr tower cranes
Staff: 19 persons



Steel treatment and reinforcement
Staff: 190 persons



Company specialised in asphalt paving
Staff: 75 persons



Space, building & facility management



Hard-sandstone quarry in Belgium

GIOLOG Dubai & Abu Dhabi



Project management :
Kühne & Nagel, SDV, GOREI, SNTA, CALIPAR,
National Air Cargo, Bolloré-SDV/AIRBUS,
Danzas, Schenker, Planet Pharmacy, Mohebi
Logistics

GIOLOG Dubai & Abu Dhabi



MOHEBI LOGISTICS

Employer: **Zainal Mohebi**

Building: **100.000 sqm** warehouse, cold & frozen storage on a **204.000 sqm** plot area
15.000 sqm Office HQ and R&D innovation facilities

Location: Dubai Logistics City, Dubai South

Progress: under construction since Q3/2015

Scope: **Complete Design, Planning & Project Management**

*Mohebi Logistics is the leading Dubai based logistics services provider serving brand names like **McDonalds, L'Oreal or Nestlé**. Mohebi also won the contract to cater to a new Nestlé manufacturing plant in Dubai South with a dedicated logistics facility of 100.000 sqm. At the same prestigious plot, the new company's headquarters will be built. GIOLOG has been assigned to do the complete design and the overall project and construction management of the warehouse and the 15.000 sqm HQ office building.*



LANDMARK GROUP

Employer: **Landmark Group**

Building: **89.000 sqm** warehouse incl. fully automated **high-bay of 42 meters** facility on a **265.000 sqm** plot area

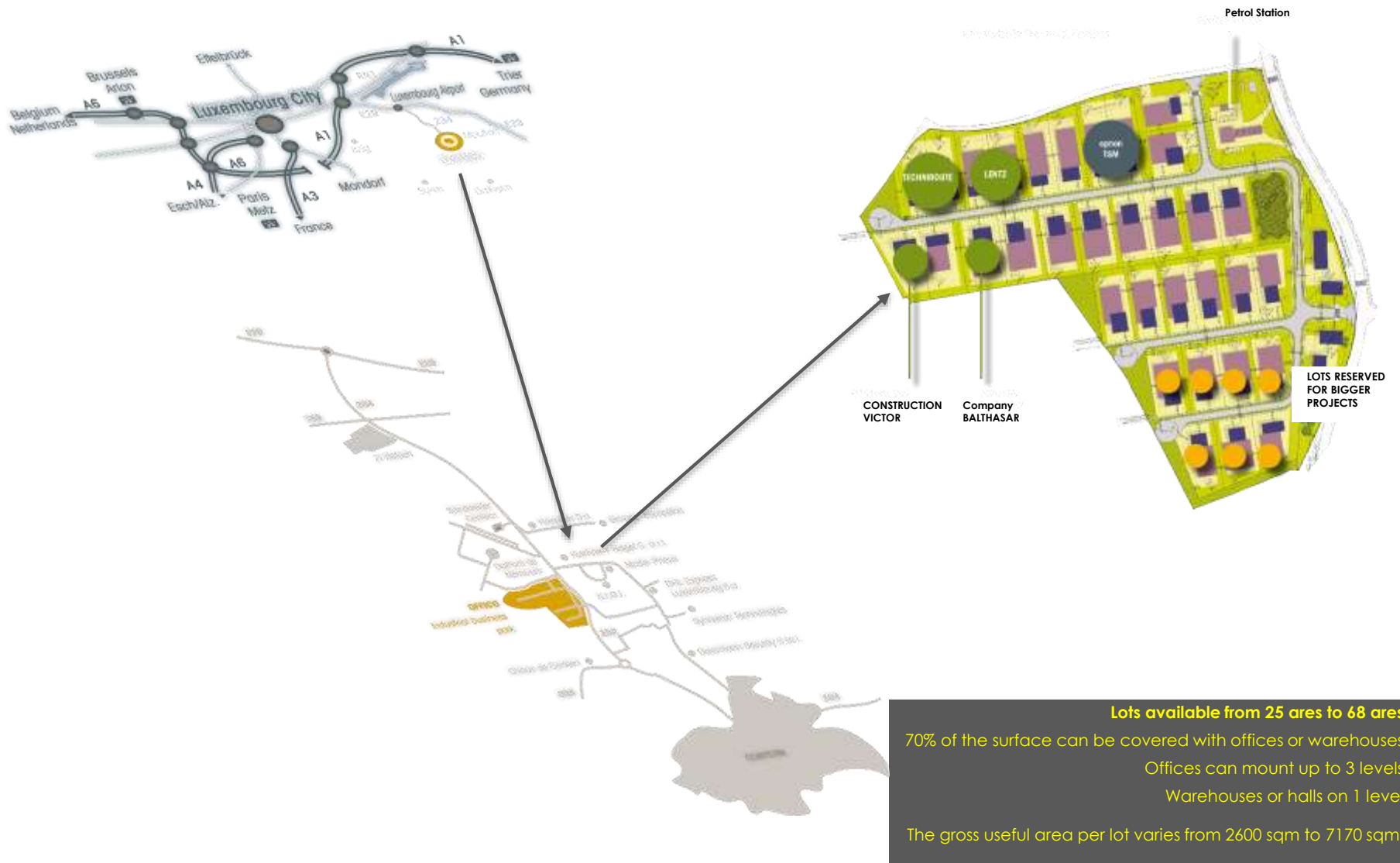
Location: Jebel Ali Free Zone, Jebel Ali, Dubai

Progress: under construction since Q1/2016

Scope: **Complete Design, Planning & Project Management**

*Landmark, one of the largest retail conglomerates across the Middle East, Africa and the Indian Subcontinent, trusted GIOLOG to design, plan and manage the development of its new 89.000 sqm fully automated high-bay distribution centre. This is the first fully automated facility of its kind in the Middle East catering to dozens of brands within the Landmark Group. This highly complex project is a corner stone of the company's ambitious growth strategy as well as a light-house development within the Jebel Ali Free Zone. **It is the first building in the Middle East housing and in/out bound processing area, mega shuttle, multi shuttle, manual warehouse, garment on hangar and high bay rack clad applying a hypoxic air system facility.** In addition, it includes a mezzanine floor slab 500mm thick supported at 8 500meter centers with 3mm deflection allowance supporting automated racking system.*

Offico – Logistics park in Contern



Bettembourg

EUROHUB SUD - PROJECT

Location and history



Former site WSA
52 hectares land
NYT, Nov 25, 1984:
Logistics site for military purposes
Operational start in eighties, investment US\$ 35 mln
US army annual operating costs US\$ 10 mln
Storage of military supply to support a 30 days war
Maintenance and repair facilities
September 2006: end of activities



Eurohub Sud / Bettembourg



Bâtiment	Surface maximale (en m²)	Surface des surfaces (en m²)	Surface totale (en m²)	Nombre de cellules	Longueur totale (en m)	Largeur (en m)	Nombre de sites (en m²)
Bâtiment 1	26 484	1 000	27 534	5	280,50	100,50	10
Bâtiment 2	26 484	1 000	27 534	5	280,50	100,50	10
Bâtiment 3	26 484	1 000	27 534	5	280,50	100,50	10
Bâtiment 4	26 484	1 000	27 534	5	280,50	100,50	10
Total	105 936	4 000	110 936	20	-	-	-

EUROHUB SUD comprises:
Intermodal Terminal
Logistics Parc

Period 2006 – 2013:
Administrative procedure:

Masterplan, Termination of WSA activities,
PAG, PAP, partial demolition buildings,
commodo

Intermodal Terminal / Bettembourg



Land 33 hectares
Transhipment of
containers, trailers
Road – Rail
Rail motorway platform

Intermodal Terminal / Bettembourg



- Lot A3: Preparation works
 - Lot B: Excavation and sanitation
 - Lot C: Foundations cranes, Modalohr, fixings and buildings
 - Lot D: road works, connection rail, various
- Planning 2014 u/i 2016
- KEY FIGURES:
- Excavation 800.000 m3
 - Additional provided material 750.000 m3
 - 11.400 m of micropiles
 - 18.800 m water evacuation gutters
 - 13.000 m drainage

Intermodal Terminal / Bettembourg



Intermodal Terminal / Bettembourg



Burange-Dudelange Interchange



Construction of I'O.A. 1072;
Demolition of former structure over rail CFL;
Lot 3 – New connection between A13 and
the Intermodal Terminal



Logistics parc



Transalliance



SOLEIL



Warehouse CFL

Construction of 3 logistics buildings

Turn-key delivery:

TRANSALLIANCE : 2013-2014

AMPACET : 2013-2014

CFL Warehouse of 30.000 m² under construction

Road works, connections, surroundings



Transalliance operations in Eurohub Bettembourg, your logistics partner in the heart of Europe

Emmanuel Louis

Directeur de Projets Stratégiques et du Bureau d'Etudes

LUXREAL

Real Estate Association of Luxembourg a.s.b.l.

Sharing your ambitions

Transalliance's operations in Eurohub Bettembourg,
your logistic partner in the heart of Europe

Sharing your ambitions

Transalliance, the Group

A European company, Transalliance designs and manufactures tailor-made solutions for Transport and Logistics



Analysis and Consultancy

- Logistics Diagram
- Organisation of Flows
- Sustainable Development
- Monitoring of and adaptation to regulations



Mutualised or dedicated contract logistics

- Production Logistics
- Distribution Logistics
- Packaging Logistics

*Votre
Supply Chain*



European land-based transport

- On road and multimodal Transport Solutions
- Flow Management
- Palletised freight distribution
- Specialised distribution
- Dedicated fleet



Expertise in International logistics

- Air & Sea freight
- Express freight operations
- In-depth knowledge of customs procedures

Achieving our ambitions thanks to the resources at our disposal



Consolidated turnover
in millions €

560

Employees

3 500

Number of vehicle
registration certificates

5 200

Warehouses
in thousand m2

760





TRANSPORT

A full range of services

Transport - range of services

Whatever your flows Transalliance offers you an on-demand and personalised transport solution.

We have resources appropriate to your specific circumstances and requirements.



Own fleet **49%**

Subcontracting **51%**



Our own fleet : the guarantee of our commitment to you



OVERSEAS

The complete answer to your logistics needs

AN INTERNATIONAL & MULTIMODAL logistics expertise.

The guarantee of reliable and customised transport solutions everywhere in the world.

Airfreight



Seafreight



**Express
freight operations**



**In-depth knowledge
of customs procedures**



- **An international presence on 5 continents**
- **Strategically located** in all major French ports and airports, as well as in North and South America, Africa and Asia.



LOGISTICS

DESIGN & DEVELOPMENT - Tailor-made solutions

Logistics strategy

Together, designing a productive and flexible supply chain

Transformation projects

Guiding you every step of the way with your project

Operational performance

Bringing operational excellence and economic performance

LOGISTICS AND PRODUCTION



DISTRIBUTION LOGISTICS



PACKAGING LOGISTICS



They trust us



- *Micro-components, food, manufactured, dangerous and bulky products ...*
- *Room temperature or refrigerated*



STUDY & CONSULTING

For a productive and flexible Supply Chain

Advising you and designing with you
a high-performance and flexible Supply Chain tailored to your business goals.

EXPERTS

Experience & complementary skills



- A **consultancy agency** that is independent and cross-disciplinary, ensuring methods and deliverables
- **Activity managers'** operational and industry experience
- A consideration of each analysis dimension by our **business experts**

TOOLS

Modeling & benchmarking



- **Boss:** design, evaluation and optimisation of the logistics network
- **Shortrec:** planning and route optimisation
- Database of operating times
- Technological and regulatory monitoring

Sharing your ambitions

Transalliance, your logistic partner in the heart of Europe

THE ORIGIN

- **1989** Transalliance Europe 's transport branch was established
- **2007** Meeting between **Alexandre MICHEL, CEO** and **Jeannot KRECKE, Minister of the Economy and Foreign Trade.**

Discussion with regards to **logistics development strategy of Luxembourg**
- **2012** **Signature of an Agreement** for our investment project on the Eurohub South logistics park, between **Alexandre MICHEL** and **Etienne SCHNEIDER, Minister of the Economy and Foreign Trade.**
- **2014** Transalliance's new Head Office - manages its european operations from Eurohub South

THE AIMS

1. Turn the Eurohub South park into a **first class logistics zone in Europe**



Etienne SCHNEIDER

Economy and Foreign Business minister, 5 September 2012

Official ceremony for the launch of the infrastructure works on the Eurohub South logistics park



THE AIMS

2. *Luxembourg* - A leading role in multimodal freight transportation through its infrastructure



THE AIMS

3. Gateway to Europe / French speaking Country



Aerial view of Transalliance's Building

Logistic supplier for
Ampacet

Headquarters and
Office building
2.500 m²

Multi-client logistics warehouse center
15.000 sqm
+ ecommerce activity

 **PARIS 8**
HAUTE SAVOIE UNIVERSITÉ

 **CroquetteLand**
Petit monde à votre service

 **Optistore**

 **POUR NOS ANIMAUX**
FR





Make logistics more sustainable

Our objectives

-20% of CO2 emissions compared to our 2015 benchmark

5 actions set up

Actions Taken	Kick off Date	Estimated closing date
Route optimization / Unproductive kms Reduction	2016	2020
Own fleet reduction consumption by 5%	2016	2020
Subcontracting consumption reduction by 5%	2016	2020
Set up of natural gas trucks and stations solutions	2016	Beyond 2020
Increase of Multimodal Part	2016	2020

Sharing your ambitions

Thanks for your attention



Logistics development in Luxembourg

Malik Zeniti

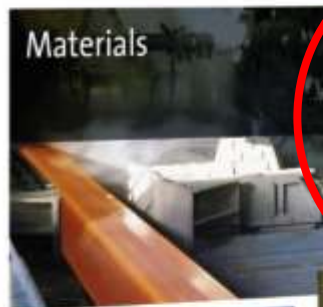
Senior Manager – Cluster for Logistics

Luxembourg, a small country with large opportunities

..in Real Estate and Logistics??

Reliable Logistics in the Green Center of Europe
Oct 2016

Logistics plays important role in diversification strategy



Question to answer:

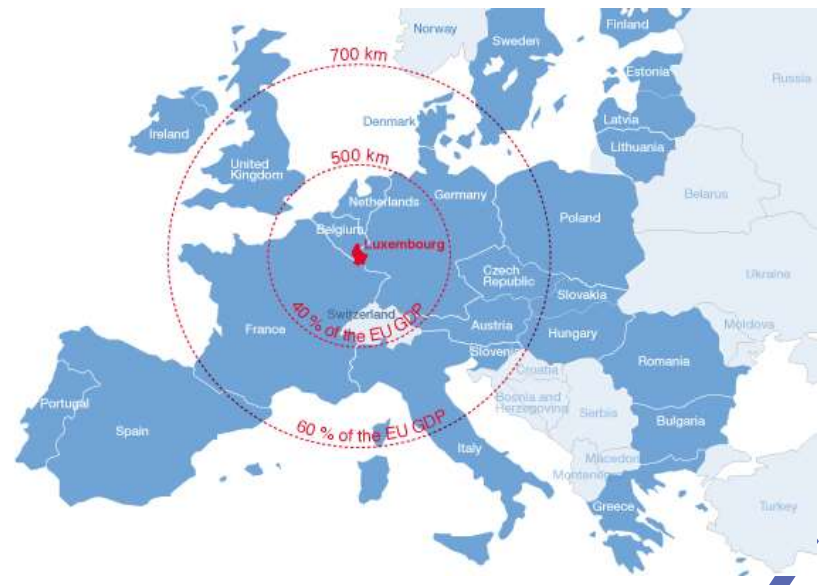
Luxembourg strategically positioned in Europe for global supply chains and e-commerce?



Logistics Hub Luxembourg strategically positionned in Europe



Greater Region 11.4 million inhabitants



Your customers expectations?



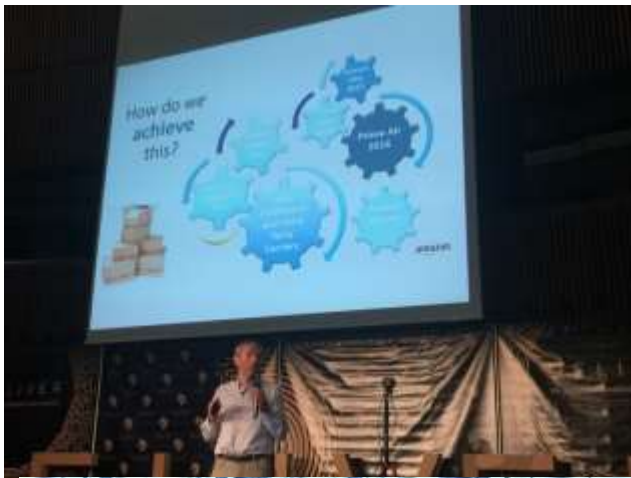
E-com event DELIVER ONE

Growth of e-Commerce

E-com event with 250 retailers and 6 company members

September 7&8 2016

Focus e-Commerce Luxembourg, central location and e-com Hub in Europe



Collaboration to position Luxembourg as hub for e-com

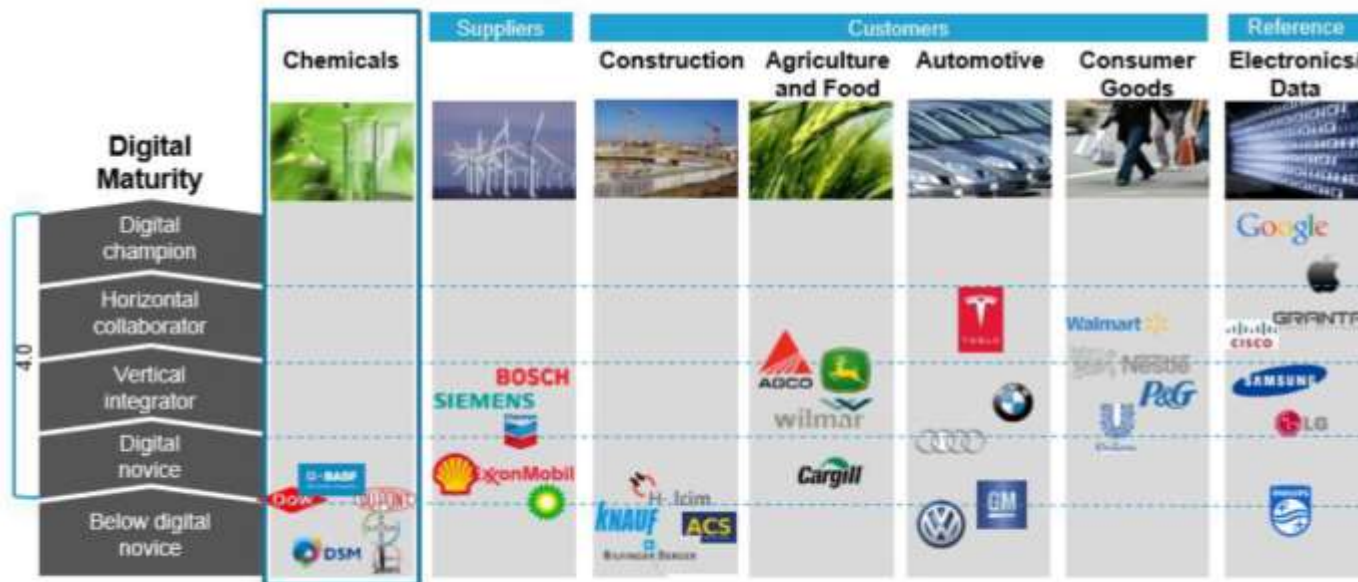
Why Logistics in Luxembourg:

- e-Logistics expected to increase in Europe. Digital maturity, availability of Digital natives?
- **Can Luxembourg position itself as Logistics Hub and IT center of excellence?**
- **Social stability & multicultural people are good for Supply Chains: How strong are Luxembourg's arguments to attract HQ functions?**
- **Large investments in modern central multimodal infrastructure: Can Luxembourg and its decision makers establish a modern sustainable Hub and Logistics Parc around the airport and in Dudelange-Bettembourg?**
- **High expertise and innovative solutions: As data mining and secure data is the new logistics fuel, do major players develop and position Luxembourg's capabilities?**

Advanced Logistics Strategy

Why Logistics in Luxembourg:

Digital Maturity



- Digital maturity, availability of Digital natives?
- e-Logistics expected to increase in Europe

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.

The Cluster for Logistics



Typical actions of the Clusters for the sector in a nutshell:

- Increase importance and **recognition** of logistics in Luxembourg
- Manage workgroups and projects to **improve the competitiveness**
- Work-out **recommendations** to governmental authorities and admins
- Organize local and international events to position Luxembourg as **international logistics hub** during exhibitions and economic missions



LuXembourg “making it happen”

- Organize local and international events to allow members **networking**
- Meet international logistics organizations to **share common experience**
- Initiate and support **innovation**
- Support **training and education**

Small but impressive, even in logistics

Luxembourg, 100 Percent Europe

- Direct access to the markets of Germany, France Belgium and over 90 cargo destinations via air travel
- International orientation of Luxembourg's companies: over 80 % of the services and goods are exported
- Multilingual & skilled workforce
- Political, fiscal and social stability
- Close contact to decision makers
- State-of-the-art infrastructures in a strategic location in Europe

Free Travel for Goods, Services, People,
Capital at the heart of 500 Million
consumers of the European Union

... is a reality every day



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, 1.1 bn added value (2013) – 7.4 % of Luxembourg GDP

No 2 LPI in 2016
vs 8th 2014

Benchmark:

- No 2 in Logistics Performance Index 2016

World Bank:

- Index of Economic Freedom 2016:
 - Luxembourg ranks 6th in the Eurozone
- IMD World Competitiveness Yearbook 2016
 - > 11th (6th) most performant globally
 - > 7th (1st) most performant country in EU

Indice de performance
logistique (IPL) Banque mondiale

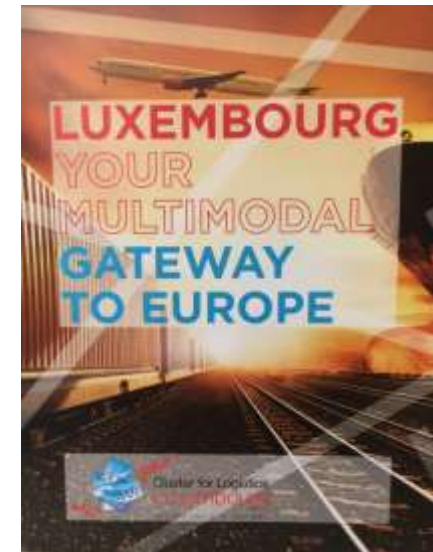
6 indicateurs de la
qualité des services
logistiques



N = 160 pays au classement Banque mondiale 2016

Main Logistics Infrastructures

Borders with Germany,
Belgium and France
570.000 hab.
2.600 km²



Logistics Infrastructures

MERTERT MOSEL-PORT

- Dedicated to break bulk
- Connection with the north sea ports by the Mosel-Rhine waterway
- 150.000 m² surface

Extended warehousing capacity for clients

- » 10.000 m² warehouse space with new secured warehouse (Tapa member)



Logistics Infrastructures

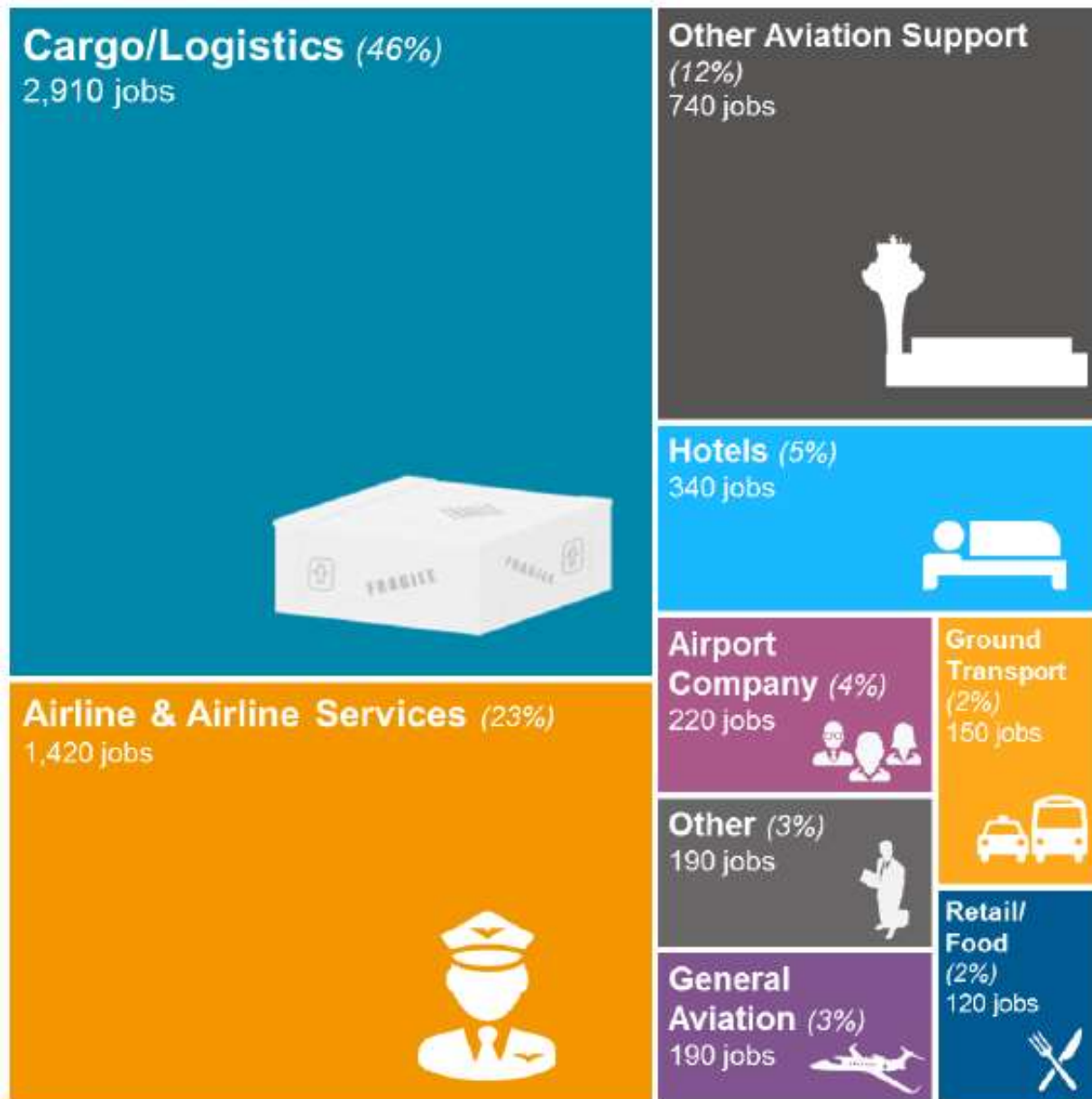
Aircargocenter FINDEL

- Modern dedicated infrastructures of an annual capacity of 1.000.000 tons
- On-site forwarder logistics centre: 58.000 m²



- **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)
- 113 truck docks
- Customs clearance 24 x 7
- Value & high competence logistics activities: perishables, pharmaceuticals, hazardous goods, valuable goods, live animals, outsized cargo.

How will airport develop until 2025?



Airport hub covers about 1/3 of Luxembourg logistics GDP



Some Logistics companies

Hub Center Contern- Sandweiler-Munsbach



Construction entrepôt de 46 000 m2



Panalpina & Wallenborn Munsbach



Kuehne + Nagel , DHL Express
UPS, CFL logistics - Contern



Some Logistics companies South Bettembourg-Dudelange, Leudelange



Arthur Welter - Leudelange



CFL Multimodal Bettembourg

Transalliance
Dudelange



Logistics Infrastructures

Rail Road Hub Bettembourg

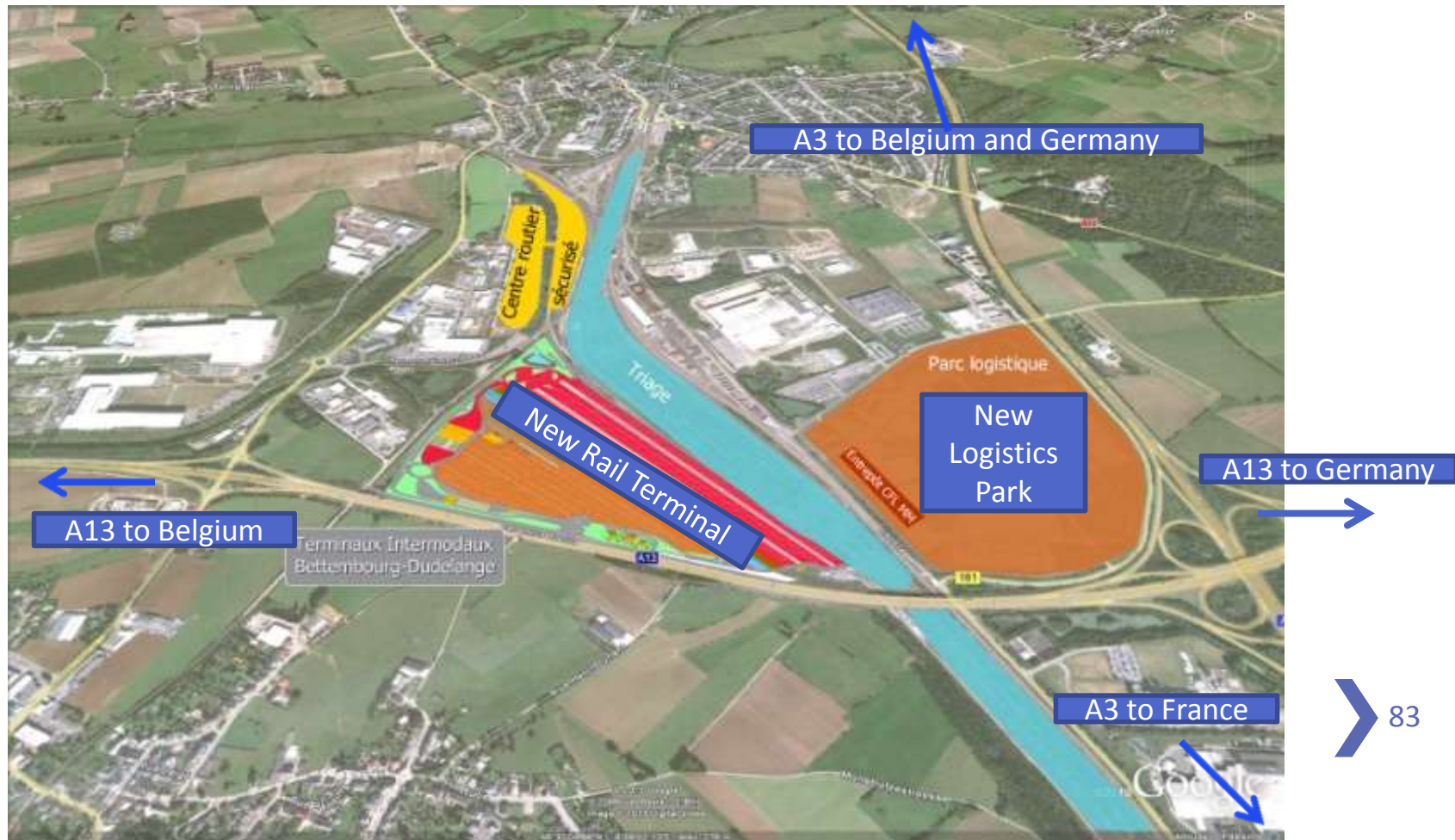
New combined rail Terminal:
4x700 m rail track for 300.000
containers and
2x 700 m rail tracks for semi-trailers
capacity per year

- 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



Logistics Infrastructures

Eurohub South Plan (Former US& Nato site)



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



Courtesy: CFL mm

Logistics Infrastructures

New Logistics Park



① 30.000 m2 CFLmm

**To be
completed
2016**

② 15.000 m2 Transalliance

**completed
2014**

③ 3 x 26.000 m2 for
new operators

2016- 2018



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

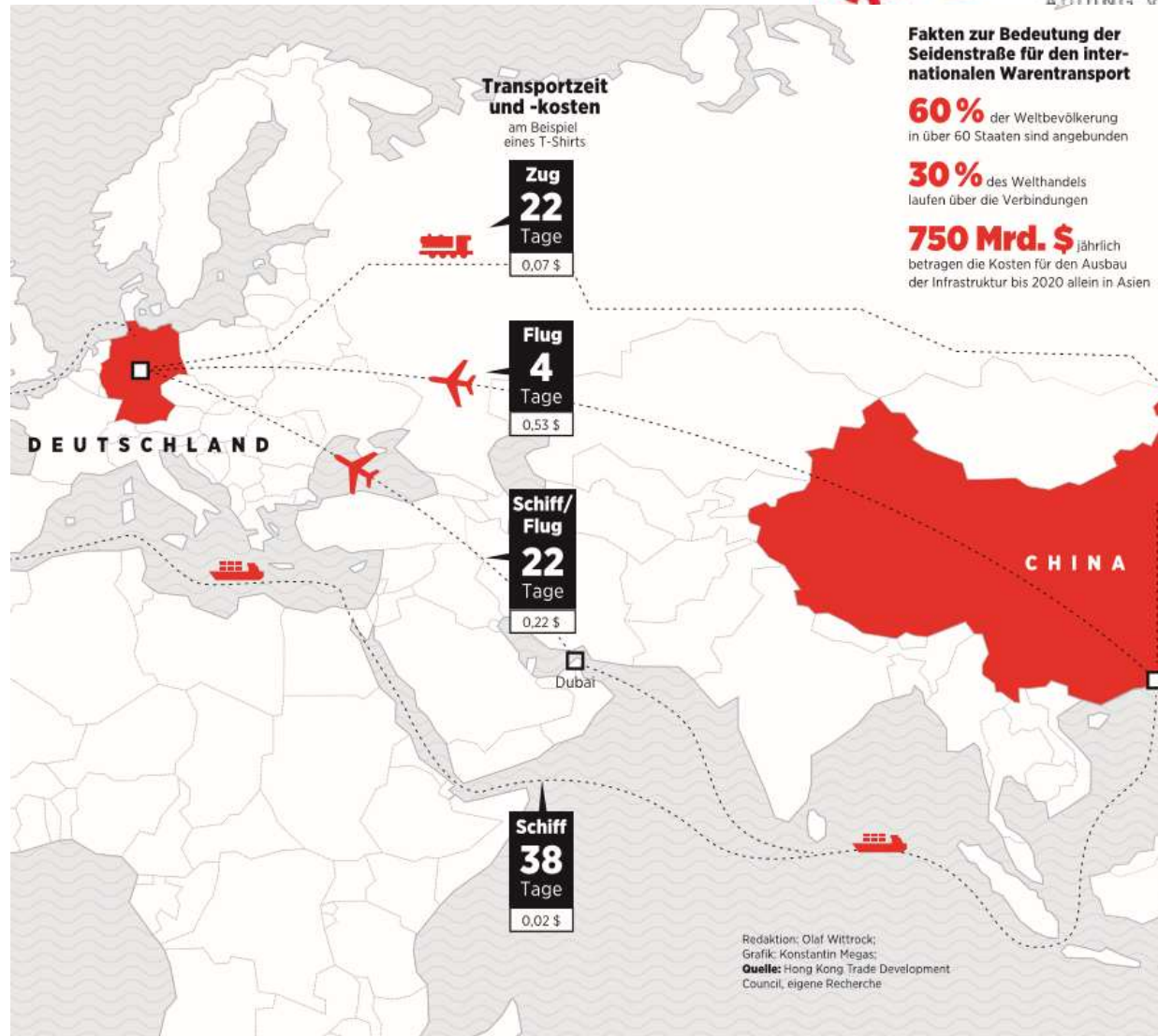
Multimodal optimisation

Influence of Silk road to and from China:
What does it mean for Luxembourg?



Challenge: Develop strategies to stay connected by embracing key partners/ investments into infrastructure

Create value through One road one belt -> China



Source Wirtschaftswoche Logistics Beilage 16.9.2016

Multimodal optimisation

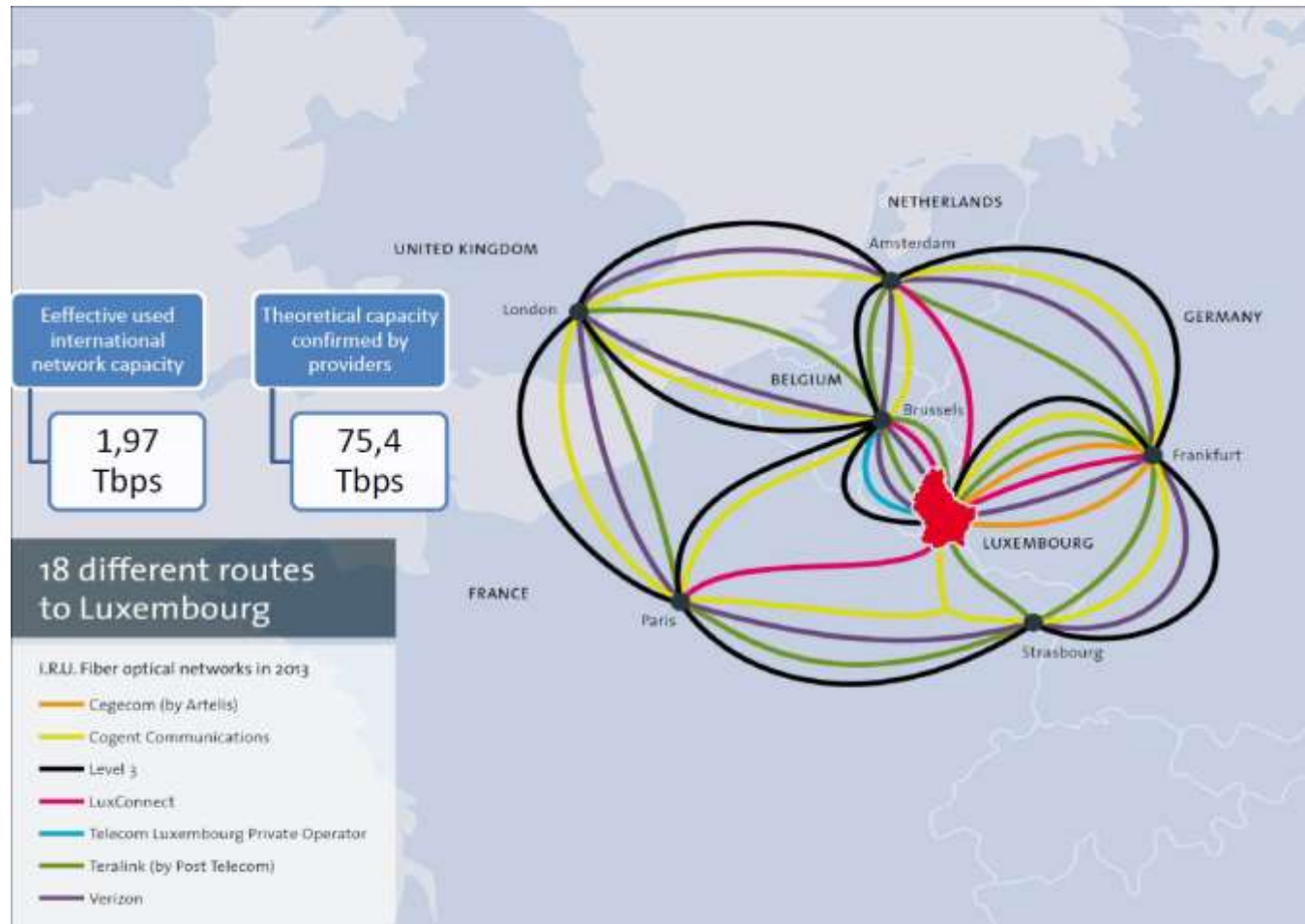
Urban logistics: What does it mean for Luxembourg?



Challenge: Develop strategies to avoid congestion while combining people and goods transport!
Requires investments into infrastructure

How do Logistics innovate?

Luxembourg's key asset: ITS CONNECTIVITY



Even virtual business models rest upon physical locations
Data has become the key to better services

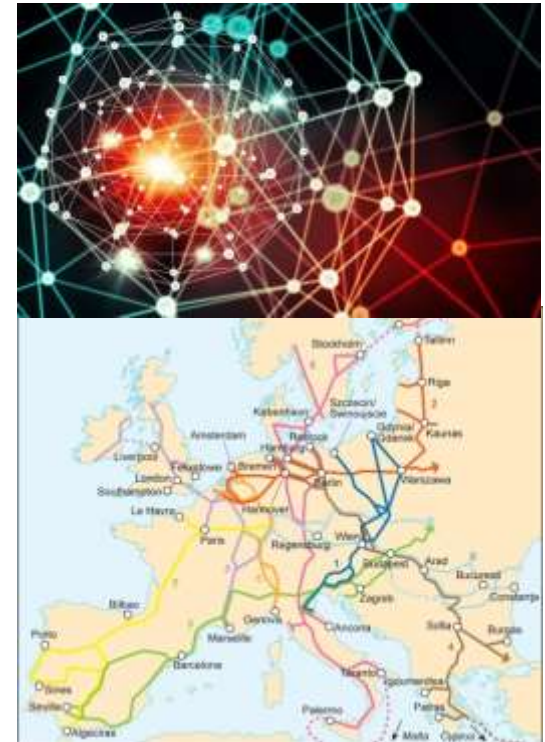
Source: Luxembourg for Business (modified)



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



Why Logistics in Luxembourg:

- Logistics surfaces and workforce expected to increase in Europe:
Can Luxembourg position itself as Hub?
- Social stability is good for Supply chains: **How strong are Luxembourg's arguments to attract HQ functions?**
- Large investments in modern central multimodal infrastructure:
Can Luxembourg and its decision makers establish a modern sustainable Hub and Logistics Parc around the airport and in Bettembourg?
- High expertise and innovative solutions: **As data mining and secure data is the new logistics fuel, do major players develop and position Luxembourg's capability?**

Cluster Projects

Lean & Green



Award ceremony 2016 (above)

Cargolux Airlines

1st Lean and Green Aviation award



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

Département des transports

Actionplan certified since 2015

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

Award ceremony 2015 (below)



**Logistics
in Wallonia**
| innovation | network |

Contact us



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

Members of the Cluster for Logistics

- Industrial companies



Members of the Cluster for Logistics

- Logistics companies



Members of the Cluster for Logistics

- Service providers



LOGISTIQUE

AU GRAND DUCHÉ DU LUXEMBOURG



8^e PAYS

Le plus performant en matière de Logistique
[Évaluation Performance Index 2014, Source Moody's]

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 300 km des ports de Rotterdam, Anvers et Zeebrugge

295

entreprises maritimes

224

navires battent pavillon luxembourgeois

1 000

engins

4 millions t.

de marchandises

FLUVIAL

PORT DE MERTERT
[transport multimodal, fluvial, rail et routier]

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

camions

58,8 millions t.

de marchandises transportées
(dont 30 millions t. à l'international)

1,5 millions

de camions en transit par an

(estimation)



AÉRIEN

7^e

aéroport de fret en Europe

85 500 m²

de capacité d'entreposage
(dont 3 000 m² pour le secteur pharmaceutique)

775 000 t.

de marchandises transportées

Source : Commission européenne, Eurostat, Luxembourg, Statistiques de l'Etat.

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Advantages members



Website www.C4L.LU

- » Company logo is displayed
- » Company is presented on the company members section on the website
- » Events of the main supporting partners can be added on the agenda of the website
- » Neutral distribution of company news via social media (Twitter, Linked In in preparation)
- » Publish PR articles and employment offers on our web page

Knowledge and networking

- » Gain knowledge of the whole logistics industry
- » Regular national and international networking opportunities with industrial logistics actors and service providers
- » Information sharing (e.g. newsletters, website information, personal meetings) and neutral consulting by C4L management
- » German BVL logistics association ; Free participation for 2 y at with limited offering www.bvl.de

Collaboration - sustainability

- » Support for LEAN and GREEN sustainable logistics program at favourite rates supported by MDD
- » Participation in ad hoc program working groups to improve competitiveness
- » Influence recommendations to administrations on policy, legal framework, education and marketing
- » European representation with CCA, BVL and ELA



The Cluster for Logistics Luxembourg a.s.b.l. has been created in 2009 under the initiative of the Ministry of Economy and Foreign Trade and the Luxembourg Chamber of Commerce.



LE GOUVERNEMENT
DU GRAND-DUCHÉ DE LUXEMBOURG
Ministère de l'Économie





Q & A

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Emmanuel Louis

Directeur de Projets Stratégiques et du Bureau d'Etudes

Malik Zeniti

Senior Manager – Cluster for Logistics

Moderator:

Sibrand van Roijen, LuxReal board member



With special thanks to our
Supporting Members

ALLEN & OVERY

alterDomus*

arendt
arndt & medernacht



bepartners
bödecker ernst & partner

BIL
BANQUE
INTERNATIONALE
À LUXEMBOURG
1856

BNP PARIBAS
REAL ESTATE
INVESTMENT MANAGEMENT

BNP PARIBAS
SECURITIES SERVICES

BROWN
BROTHERS
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INVESTOR SERVICES

CBRE

CLIFFORD
CHANCE

CREDIT SUISSE

CRESTBRIDGE

CUSHMAN &
WAKEFIELD

Deloitte.

DREES &
SOMMER

DTZ

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Reliable & Independent

EY
Building a better
working world



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KBL
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LRI
Invest
Luxembourg

LIS
LUXEMBOURG
INVESTMENT
SOLUTIONS

Luther.

LUXEMBOURG
CAPITAL
Investments and Corporate Services

MAZARS

mnks
A DIFFERENT LAW FIRM

MOLITOR

pancura
INDEPENDENT AIR MANAGER

pandomus
STRATEGIC INVESTMENT SERVICES

Pramerica

pwc

PROLOGIS

QUILVEST
ASSET MANAGEMENT

RBC Investor &
Treasury Services

RESIDENCE
CONCEPT
REAL ESTATE DEVELOPMENT

SANNE

SGG

BUILDING TEAM SPIRIT TOGETHER
SOCIETE GENERALE
Securities Services

TMF
GROUP

Union
Investment



Cocktail

Thank you for coming and enjoy the evening