



Flanders Investment & Trade
Government of Flanders - Belgium

Flanders:

A unique value proposition
for your logistics!



Servicing the continental European market



	road distance	drive time	flight time
Berlin	774	7:05	1:20
Warsaw	1,328	14:52	2:00
London	309	4:45	1:05
Leeds	636	7:23	1:40
Madrid	1,604	14:45	2:30
Lisbon	2,231	20:19	2:50
Frankfurt	398	3:43	1:05
Oslo	948	17:23	1:55
Stockholm	1,506	15:59	2:10
Helsinki	1,671	28:27	2:40
Moscow	2,582	31:48	3:20
Prague	918	8:50	1:25



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In km and hours:minutes

Proximity

60% of EU purchasing power within **500 kms** of Flanders



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Benefits of having a distribution in Flanders

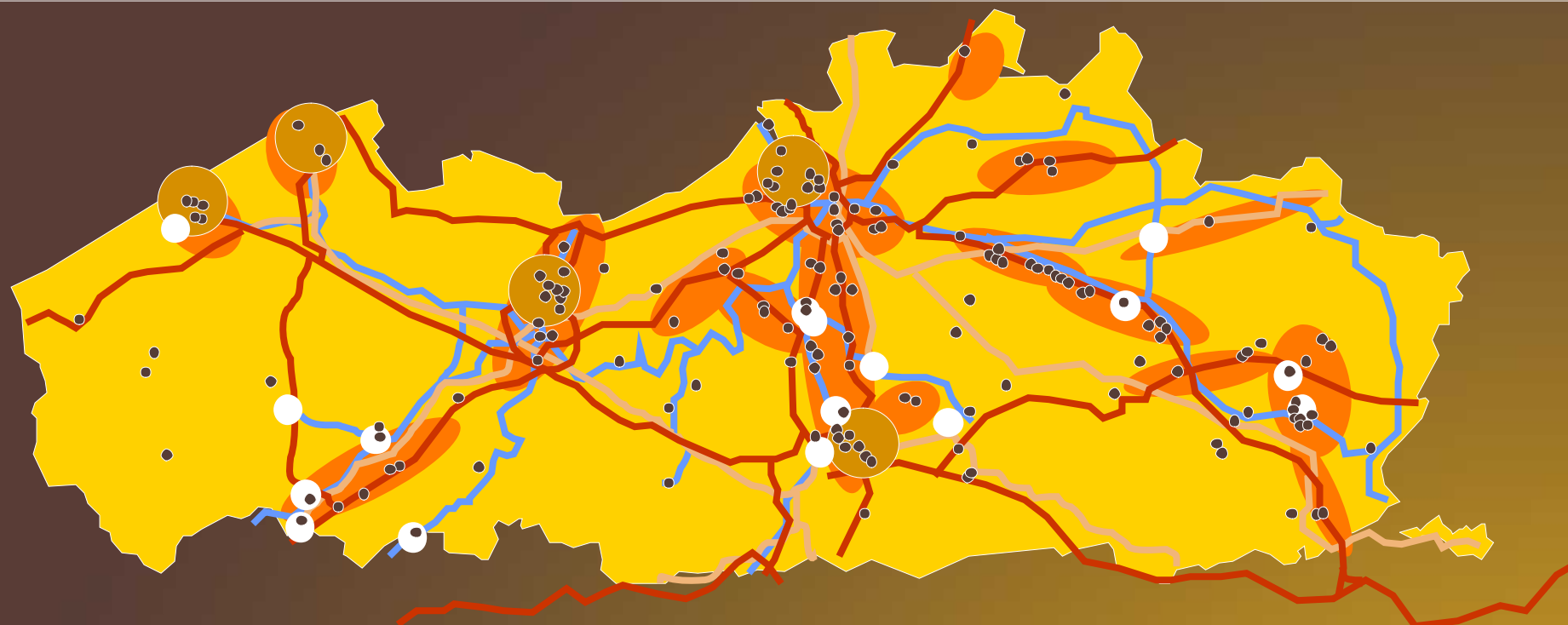
Efficient incoming and outgoing product flow:

- reduction of costs and stock
- better product availability
- Reduction of delivery time
- **Proximity to main markets and suppliers:**
 - faster response to the market
 - better competitive position
- **Flexibility to adjust workforce according to demand fluctuations**
- **Stable environment and effective communications**



The extended gateway Flanders

The multimodal integrated hinterland network with prime locations



- Extended Gateway (potential)
- International Gateway
- Multimodal platform
- European Distribution Center
- Road
- Rail
- Water



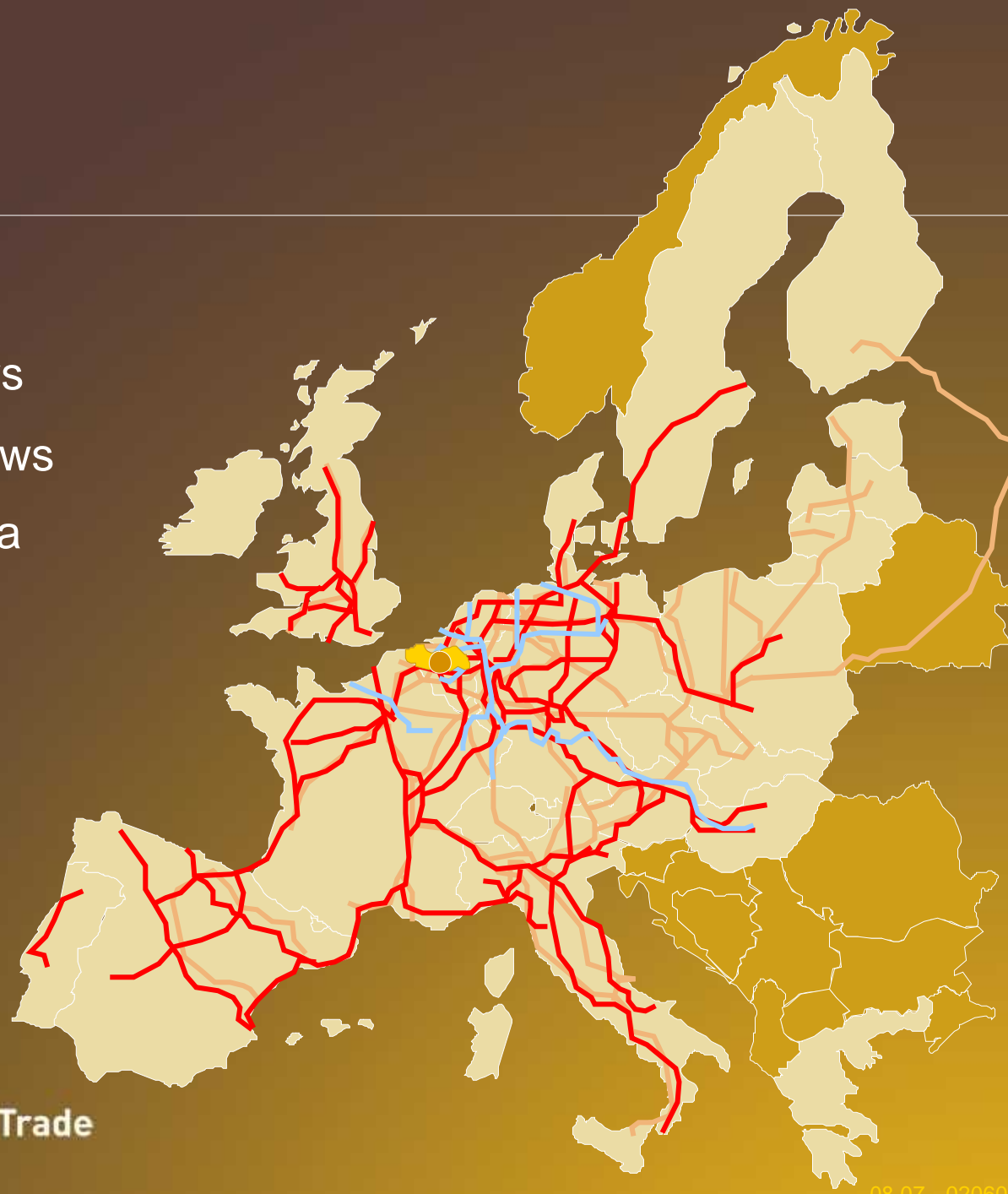
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Source: VIL, 2006

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Gateways

- Major rail freight flows
- Major road freight flows
- Major freight flows via inland waterways



Cushman & Wakefield's EU Distribution Report

Europe's N°1 logistics location:

“Flanders is, in keeping with previous years, in first place as European logistics location. The region's ranking is based on factors such as the cost of warehousing, land and employment, the quality of transport systems and the accessibility of the region. Flanders will remain in the top spot until at least 2019.”

(report 2006)



Top-10 European distribution locations

Ranking	2001	2003	2005	2007
1	Belgium	Belgium	Belgium	Belgium
2	Netherlands	France	France	Netherlands
3	Germany	Germany	Netherlands	Hungary
4	France	Netherlands	Czech Republic	Czech Republic
5	Czech Republic	Czech Republic	Poland	Poland
6	Italy	Poland	Germany	France
7	Poland	Austria	Hungary	Austria
8	Austria	Hungary	Italy	Germany
9	UK	Italy	Austria	Slovakia
10	Hungary	UK	UK	Italy
11	-	-	-	UK



Fdi Magazine: EU Region of the Future

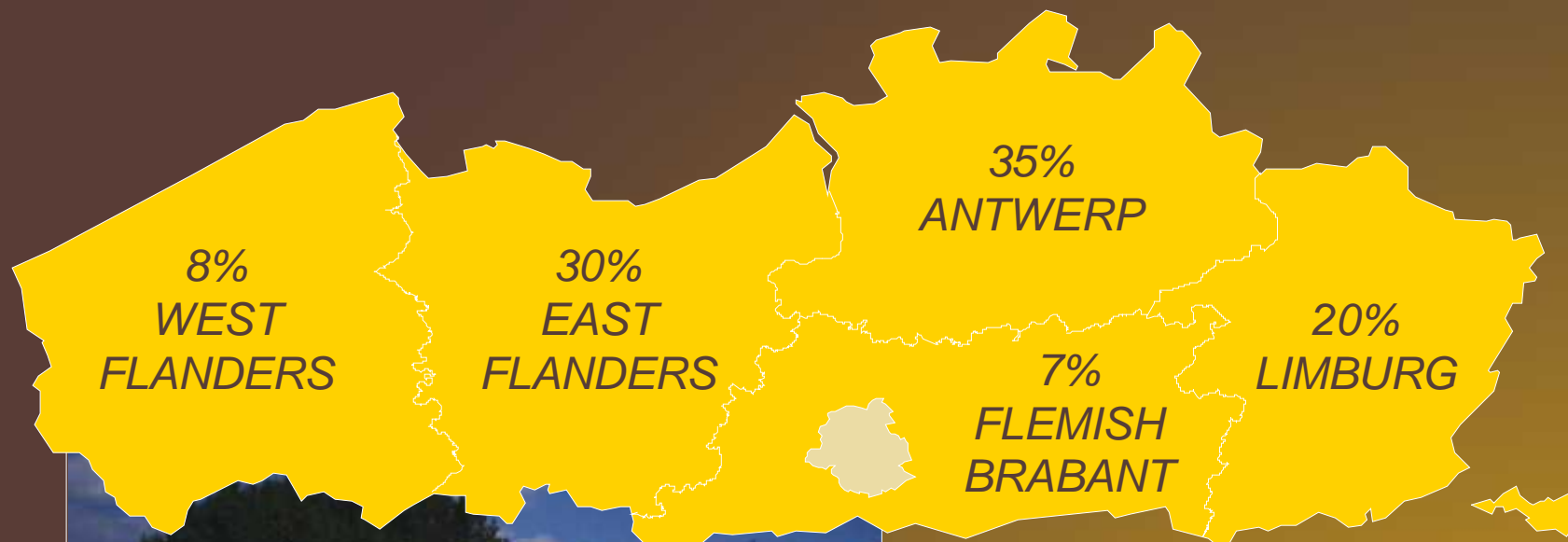
(Foreign Direct Investment magazine of The Financial Times Group)

Flanders is the number 2 region in Europe for foreign direct investment and the number 2 in the overall ranking of “Top European Regions of the Future 2008/2009”.



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Know-how: More than 700 European logistics centers in Flanders > highest rate in Europe!!!



f.i. Toyota, Scania, Becton Dickinson, Pioneer, Sara Lee, Proctor & Gamble, Samsonite, Black & Decker, Honda, Nike, SKF, Duracell, etc.



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Example 1: Pfizer



Production and packaging site in Puurs (Antwerp):



Pfizer: history in Flanders



- **Active in Belgium since 1952**
 - > 1st establishment on the EU continent!
- **Total number of personnel: 2900 in Belgium**
- **5 sites in Belgium, of which 4 in Flanders:**
 - Zaventem: EU logistics center (1 but largest worldwide!!!)
 - Anderlecht: R&D
 - Bornem: production EMEA
 - Puurs: largest EU production & packaging site (1 but largest worldwide); 96% of the production is meant for export to 170 countries)



Pfizer quotes



“The solid anchoring, both in the field of research, production and distribution, are witnesses to Pfizer’s belief in Belgium as an investment country.”

“The successive investments over the past three years make up for a total amount of 130 mio euro. Undeniably proof that Pfizer believes in Belgium as an investment country.”

(source: www.pfizer.be/Pfizer+Belgium/Pfizer+in+Belgium/)



Pfizer: advantages of Flanders

Interview with Mr Paul De Neve, CEO Pfizer:

- **General quality level of the workforce**
- **The infrastructure: a lot of investments in transport**
- **Well-known international location thanks to the presence of NATO and the EU institutions**
- **Bonded warehouse system**

- **When considering moving activities, they would never move the distribution center!**



Example 2: Ceva Ground Europe

MAKING BUSINESS FLOW



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Ceva Ground Europe: 4PL project

- 3PL offering logistics services to many sectors: automotive, technology, industry, retail & consumer goods, health care, aerospace, energy, etc.
- End-to-end design, implementation & operation of logistics solutions in contract logistics, freight forwarding, distribution and transportation management
- 2007: merger of TNT Logistics (°Austr/NLs, contract log.) & EGL (°USA, freight mngt)
- 6,8 billion euro turnover => **4th largest log. service provider**



Ceva Ground Europe: 4PL project

- **Atlantic House: control tower (cf. 4PL) since Monday:**
 - 8 up to 40 staff
- **3 locations in Flanders:**
 - Antwerp (freight: ocean and ground)
 - Willebroek (contract): 500 employees
 - Zaventem (freight): head office; 100 offices
- **www.cevalogistics.com**

Ceva Ground Europe: 4PL project

- **Trumps of Antwerp according to Mr Wouter Coppens, CEO Ceva Ground Europe:**
 - Language skills
 - Good schools > ideal for finding future staff
 - “Antwerp” and “Atlantic House” known worldwide (brandname)
 - All activities are visible out of the window of the Atlantic House
 - Antwerp is n°2 port in the world
 - Good infrastructure (heart of EU, regular services to all destinations worldwide, hinterland connections excellent, appropriate storage solutions for each product, etc.)

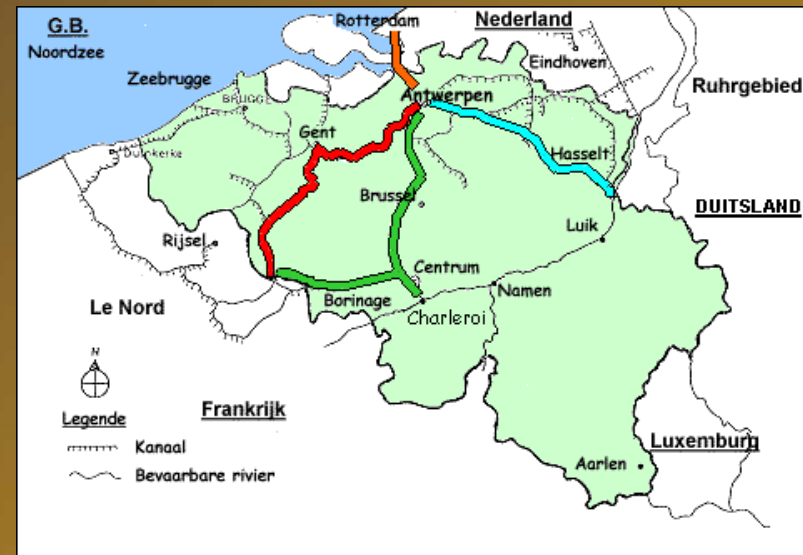


Example 3: Nike



Nike EMEA logistics center – Eindhoven

- Nike in EU in 1972 in NLS (Waalwijk); distribution done locally with 30 EDCs
- Centralisation of distribution centers to EMEA logistics center in 1994:
 - reason:
 - warehouse cost
 - transport cost
 - inventory cost (largest cost!)
- **Location in Eindhoven:**
 - Outside of port of Antwerp
 - Alongside Albert canal
 - Multimodal platform:
 - rail, road, water



Nike EMEA logistics center – Eindhoven

- **Why choose this location outside of the port?**
 1. Centrally located (24h delivery time)
 2. Infrastructure availability: multimodal platform (consolidation of transports with neighbouring countries)
 3. Cooperation with the government: acquiring land, building permits and environmental permits, etc.
 4. Availability of personnel (1500 FTE on the payroll + 800 seasonal workers)
 5. Flexible labour legislation

With 200.000m² floor space, Nike EMEA logistics center is Flanders' largest distribution center!!! It is also the largest DC in Europe, as well as the largest DC for Nike in the world!!!



Nike EMEA logistics center – Eindhoven

- **Located at the WTC, Water Container Terminal**
 - Flanders' oldest inland container terminal
 - Established in 1995 by 4 Flemish companies
 - Since 2005: trimodal infrastructure
 - Extends over 10Ha; storage capacity for over 8000 TEU/containers
 - Users of the WTC: Nike, IKEA, Borealis, BP Chemical, Toyota, Hyundai, Kaneka and Johnson & Johnson



Nike EMEA logistics center – Eindhoven

- “For a European logistics center such as Nike’s, Flanders is the ultimate location. Right at the center of European spending power, with excellent connections to all clients in the EMEA region. This is the best location in Europe.”

Luc Hooyberghs
General Manager
Nike ELC



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