



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

ADDING VALUE IS THE KEY

**Logistics Business Forum**

**2012**

# Agenda





- **Federate the Luxembourg logistics operators**
- **Define a common strategy to develop logistics in Luxembourg**
- **Line up actions to improve Luxembourg's competitive framework**
- **Prepare recommendations to the governmental authorities**

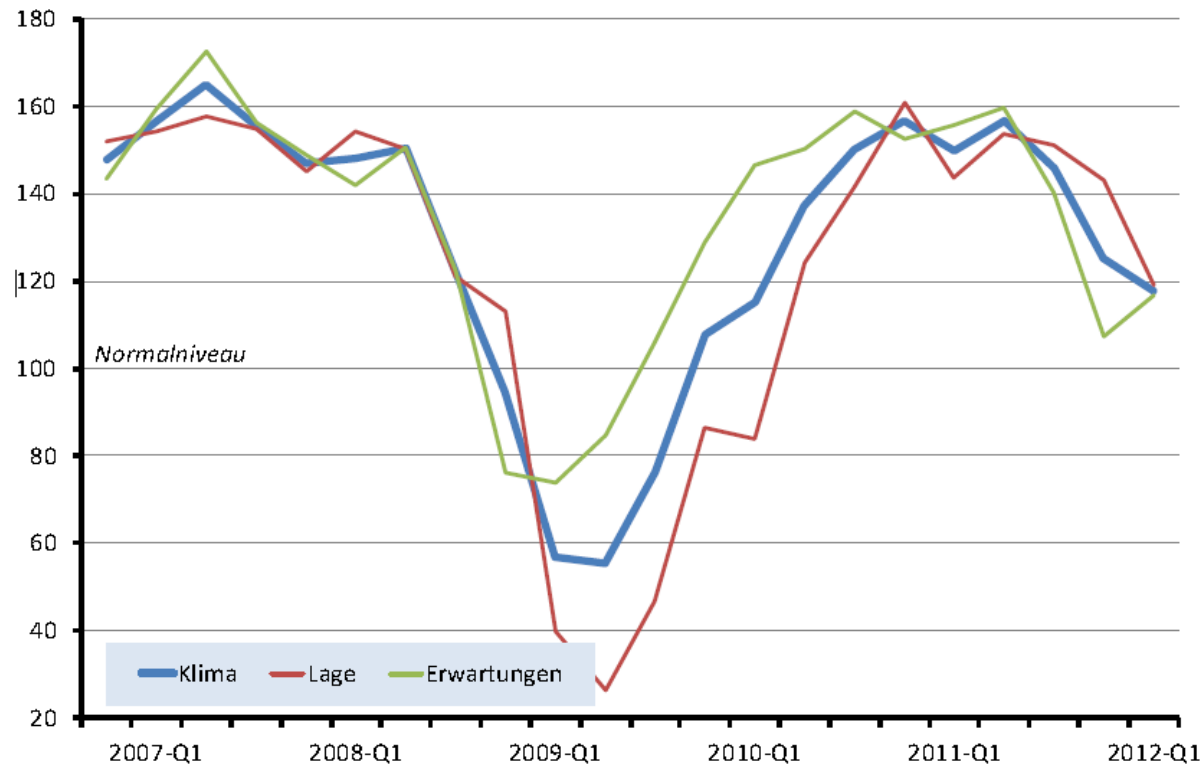
**The overall target is to make of Luxembourg a major European logistics hub**





## Teilindikator „Logistikdienstleister“

Indexpunkte



## Evolution of logistics indicator Germany

Source: BVL

# Luxembourg : when location matters



**Global logistics. Tailor-made solutions.**

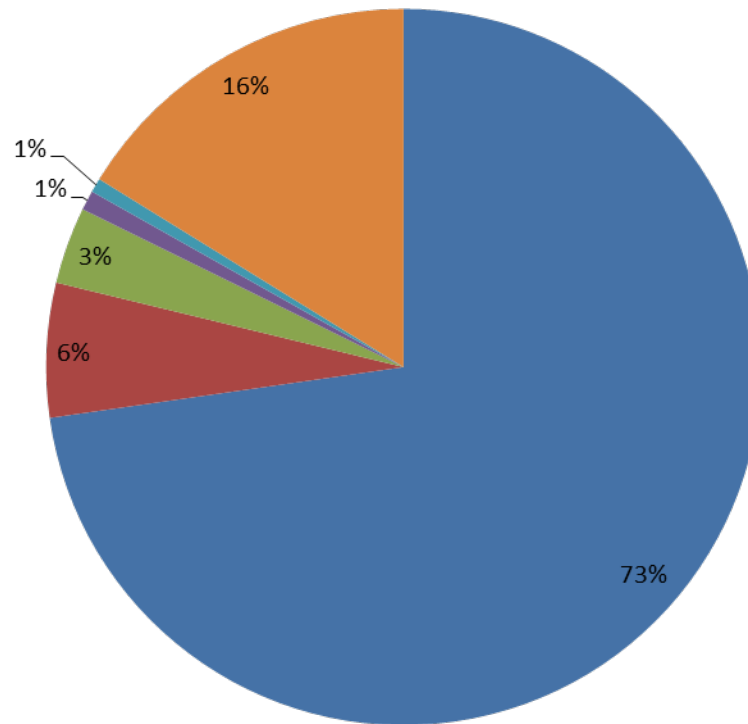


[www.clusterforlogistics.lu](http://www.clusterforlogistics.lu)



[www.cluster-maritime.lu](http://www.cluster-maritime.lu)

■ Sea ■ Road ■ Rail ■ Inland waterway ■ Air ■ Pipelines & Others



## EU27 : Foreign trade by transport mode

Source: EUROSTAT



Airports in Europe	Tons of air freight
GERMANY (FRA-HHN-CGN)	3100
NETHERLANDS	1500
FRANCE(Paris)	2300
BELGIUM	1100
LUXEMBOURG	700
TOTAL EU 27	14700
<b>Corridors/EU 27</b>	<b>+ 93%</b>
<b>Growth 2009/2010</b>	<b>+ 16%</b>

**-> 60 % in a range of 350 km to Luxembourg**

**EU27 : air freight per airport 2010**

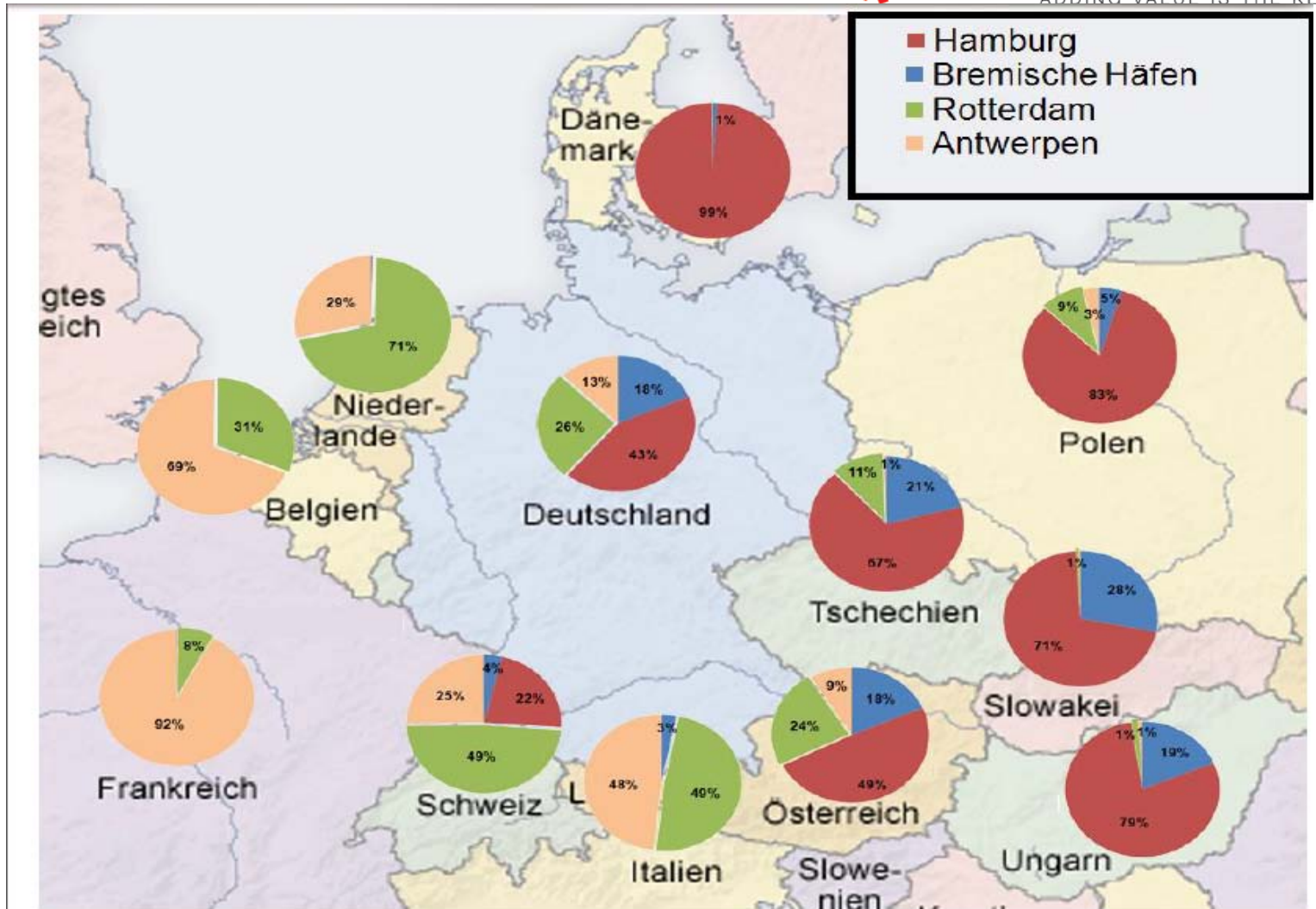
Source: EUROSTAT

Ports in Europe	Containers in 1000 TEU's
ROTTERDAM	11017
ANTWERPEN	8144
HAMBURG	7906
BREMERHAVEN	4858
LE HAVRE	2369
ZEEBRUGGE	1437
<b>Corrdiors/EU27</b>	<b>77%</b>
<b>Growth 2009/2010</b>	<b>+ 14%</b>

**-> 50 % in a range of 350 km to Luxembourg**

**EU27 : Hinterland of seaports 2010**

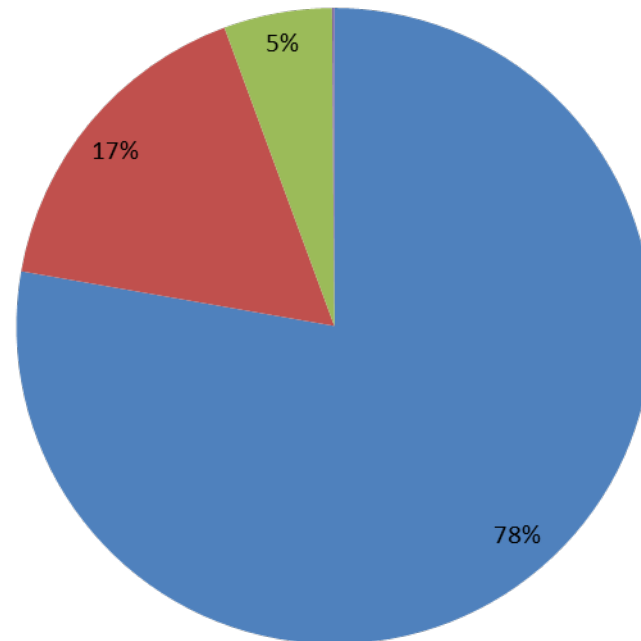
Source: EUROSTAT



## EU27 : Market shares of north sea ports per country

Source: PORT OF HAMBURG

■ Road ■ Rail ■ Inland Waterway



## EU27 : European inland transport

Source: EUROSTAT



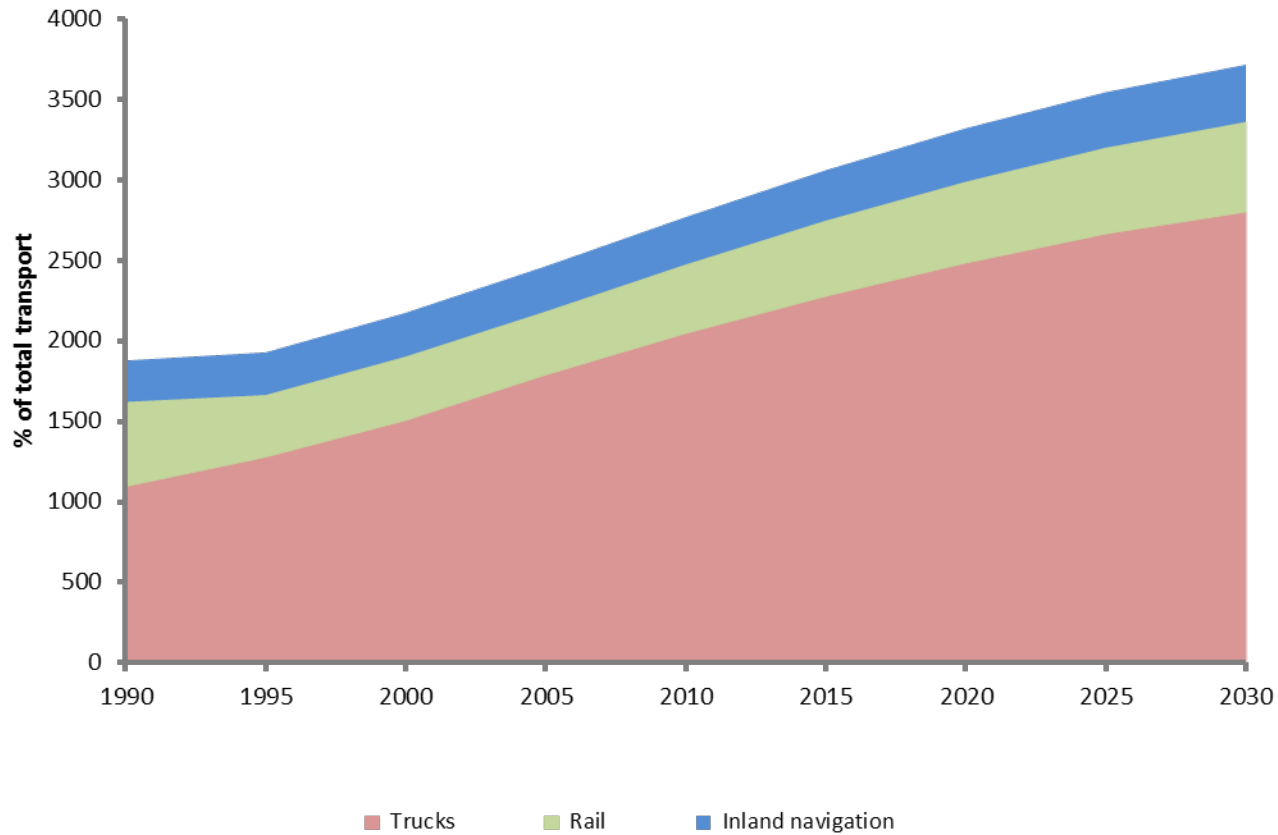
EU27 : European land freight corridors

International Land transports in Europe	in millions TKM
Germany	94.000
Benelux	90.000
France-Spain	88.000
Italy-Switzerland	33.000
Scandinavia	11.000
UK	9.000
<b>Corrdiors/EU27</b>	<b>74 %</b>
<b>Growth 2009/2010</b>	<b>+ 15%</b>

**-> 74 % related to corridors crossing Luxembourg**

**EU27 : international land transports per country 2009**

Source: EUROSTAT



## EU27 : Evolution by transport mode

Source: EUROSTAT






















*Good ...*

*but not sufficient*
















- **Links with Europe:**

Belgium				
Netherlands				
France				
Germany				
Italy				
Spain				
Scandinavia				

- **Infrastructure:**

Mertert				
Findel				
Bettembourg Dudelange				
<b>Luxembourg</b>				

- **Some international logistics operators, sponsors of the forum:**



**cargolux**

**KUEHNE+NAGEL**



Number of companies	2005	2010	Growth
ROAD	281	325	16 %
RAIL	2	3	50 %
SEA & WATER	130	167	28 %
AIR	40	47	18 %
TOTAL	452	540	19 %

Source: IGSS

EMPLOYMENT	2005	2010	Growth
ROAD	6500	7300	12 %
RAIL	450	500	11 %
SEA & WATER	2600	4200	62 %
AIR	3200	4200	31 %
TOTAL	12800	16200	27 %

Source: IGSS

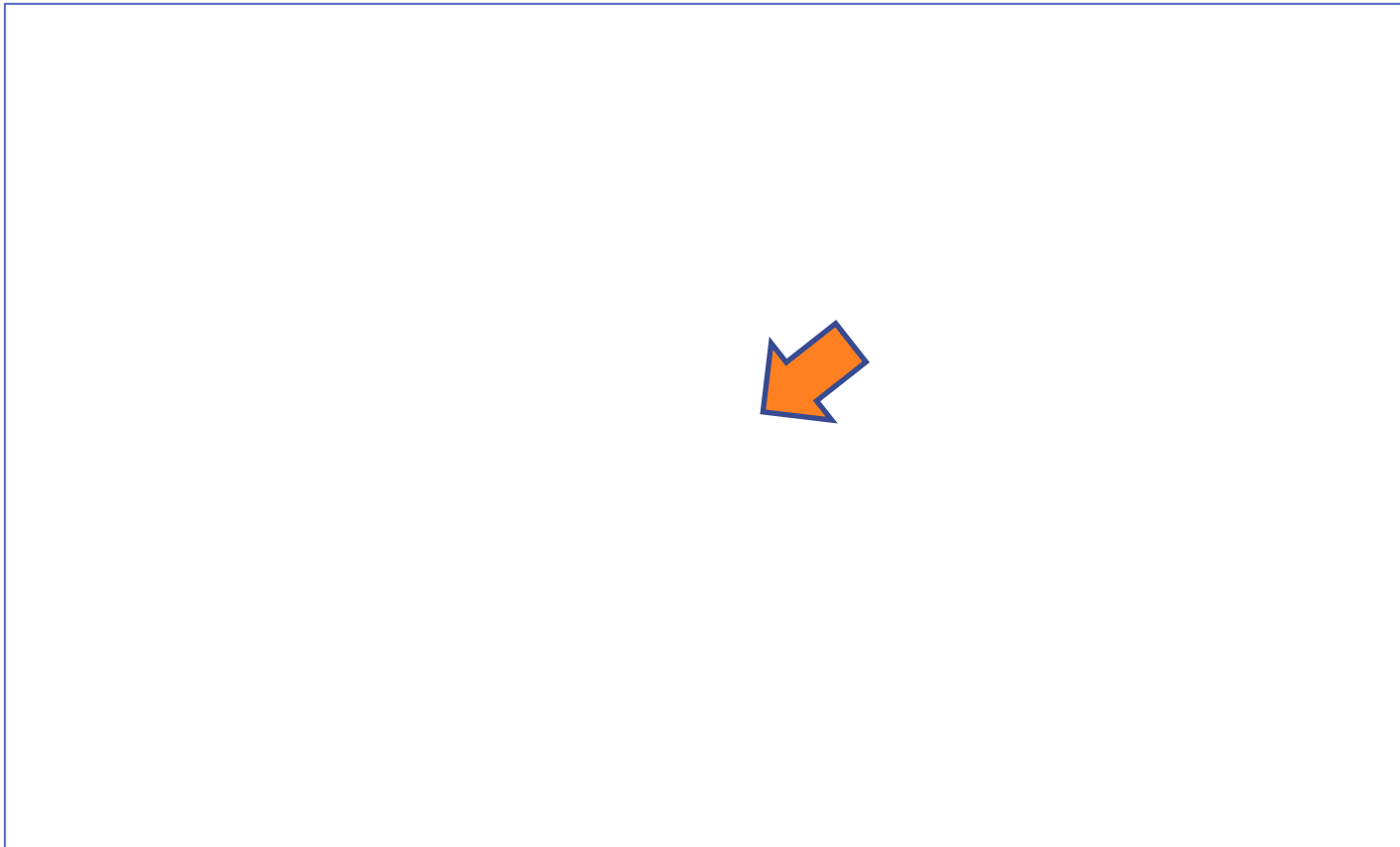
**LOGISTICS represents 5 % of total employment in Luxembourg**

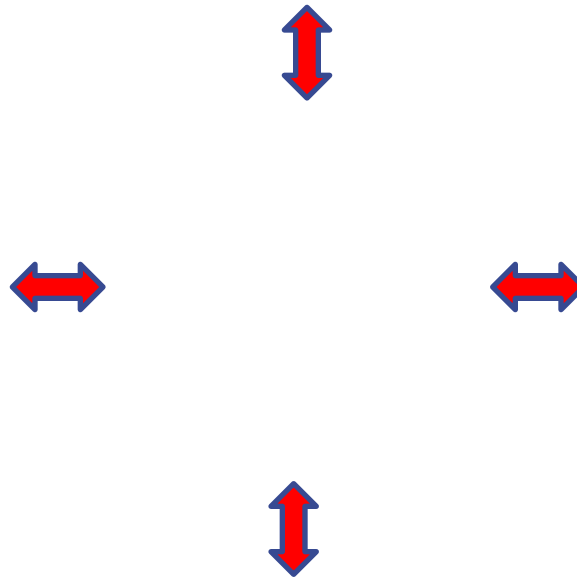
*We have to offer*  
*more*





- **Study Future for Logistics**





***Strategic options defined by the members of the Cluster***

*And even much  
more*



















We can and  
we will!



**KUEHNE+NAGEL**

