



Benelux

CSCMP

GLOBAL PERSPECTIVES

CONNECT. COLLABORATE. CSCMP.



Council of Supply Chain
Management Professionals

Benelux

written by:

Thomas Bougard, *Invest Wallonia*
Krist'l Krols, *Flanders Institute for
Logistics (VIL)*

Marc Linster, *TriPoint Interactive*

Ron Roest, *CEVA Logistics*

Stephan Satijn, *Holland*

*International Distribution Council
(NDL/HIDC)*

Cover image source:

Port of Amsterdam

Editor: Jessica D'Amico
Direct Line: +1 630.645.3460
E-Mail: jdamico@cscmp.org

CSCMP Global Perspectives
is published by the:
**Council of Supply Chain
Management Professionals**
333 East Butterfield Road, Suite 140
Lombard, Illinois 60148-5617 USA
Phone: +1 630.574.0985
Fax: +1 630.574.0989
Web Site: cscmp.org

©2008 Council of Supply Chain
Management Professionals



Table of Contents

Section I. Introduction	5
Section II. European Logistics Developments	6
A. The European Union, Europe, and the EMEA Region	6
1. <i>The European Union</i>	6
2. <i>Europe</i>	6
3. <i>EMEA</i>	6
B. Evolution of European Logistics Structures	6
1. <i>European Logistics Service Center (ELC)</i>	7
C. Benelux's Role in European Logistics	7
Section III. Benelux—Gateway to Europe	7
A. Benelux Facts and Figures	8
B. Central to the Main European Markets	9
C. The Main Seaports and Cargo Airports	10
1. <i>Seaports</i>	10
<i>Port of Rotterdam</i>	12
<i>Port of Antwerp</i>	13
<i>Port of Amsterdam</i>	13
<i>Port of Ghent</i>	14
<i>Port of Brugge/Zeebrugge</i>	15
<i>Zeeland Seaports</i>	15
<i>Port of Velsen/IJmuiden</i>	15
<i>Port of Oostende</i>	15
2. <i>Airports</i>	16
<i>Amsterdam Airport Schiphol</i>	17
<i>Luxembourg Airport Findel</i>	17
<i>Brussels Airport</i>	19
<i>Liège Airport</i>	20
D. Trade Flows	20
E. Logistics Infrastructure	22
F. Multimodal Transport	23
1. <i>Road</i>	24
2. <i>Rail</i>	25
3. <i>Inland Waterways</i>	26
4. <i>Short-Sea Shipping</i>	27
Section IV. Logistics Solutions in Benelux	28
A. Intelligent Logistics	28
1. <i>Benelux: Logistics Knowledge Center</i>	28
<i>Value Added Logistics and Services (VAL/VAS)</i>	29
<i>Reverse Logistics Flows</i>	29
<i>Horizontal and Vertical Collaboration Between Shippers and Logistics Service Providers</i>	29
2. <i>Supply Chain Control Towers</i>	30
3. <i>Mainports, Brainports</i>	30
4. <i>Extended Gateways</i>	31
B. Benelux on the International Tax Radar Screen	31
1. <i>Customs</i>	31
2. <i>Value Added Tax (VAT)</i>	31
3. <i>Corporate Income Tax</i>	31

4. <i>Authorized Economic Operator (AEO)</i>	32
5. <i>Summary</i>	32
Section V. Business Cases of Pan-European Solutions in Benelux	32
A. Nike EMEA Logistics Center in Belgium	32
1. <i>Overview</i>	32
2. <i>Business Drivers for Creating the Solution</i>	32
B. Johnson & Johnson MD&D EDC in Belgium	33
1. <i>Overview</i>	33
2. <i>Business Drivers for Creating the Solution</i>	33
C. European Competence Center for Apple Computers, Inc., in Luxembourg.....	34
1. <i>Overview</i>	34
2. <i>Business Drivers for Creating the Solution</i>	34
D. FloraHolland Aalsmeer in The Netherlands	35
1. <i>Overview</i>	35
2. <i>Business Drivers for Creating the Solution</i>	36
E. ELC of Amgen in The Netherlands.....	36
1. <i>Overview</i>	36
2. <i>Business Drivers for Creating the Solution</i>	36
Section VI. Future Outlook	37
Section VII. Additional Information	38
A. Major 3PLs in Benelux	38
1. <i>Belgium</i>	38
2. <i>Luxembourg</i>	38
3. <i>The Netherlands</i>	39
B. Logistics and Supply Chain Links and Contacts.....	39
1. <i>Seaports and Cargo Airports</i>	39
C. Logistics Research Centers and Universities	40
D. National and Regional Government Organizations	41
E. Professional Associations and Trade Associations	42
Endnotes	43
List of Tables	
Table 3.1: Benelux Facts and Figures.....	8
Table 3.2: GDP by Country in the European Union	9
Table 3.3: Carriers Calling at Major Seaports.....	11
Table 3.4: Top Six European Cargo Airports	16
Table 3.5: 2006 Imports and Exports Into Benelux as a Percent of EU Imports.....	21
Table 3.6: Logistics Network Density in Benelux and the EU-25	23
Table 3.7: Cabotage in Europe in 2005	24
Table 7.1: Major Logistics and Transportation Companies Active in Belgium	38
Table 7.2: Major Logistics and Transportation Companies Active in Luxembourg	38
Table 7.3: Major Logistics and Transportation Companies Active in The Netherlands ..	39
List of Figures	
Figure 3.1: Regional Distribution of GDP in European Union Countries	10
Figure 3.2: The Seaports of Benelux	11
Figure 3.3: Map of the Port of Rotterdam.....	12
Figure 3.4: Map of the Port of Antwerp	13
Figure 3.5: Map of the Port of Brugge/Zeebrugge.....	14
Figure 3.6: Benelux Cargo Airports	16



Source: Store-Ship, Member
of the Broekman Group
(www.storeship.nl)

Table of Contents, continued

Figure 3.7: Schiphol Cargo Destinations	17
Figure 3.8: Cargo Carriers at Luxembourg Airport Findel	18
Figure 3.9: Freight Type Distribution at Luxembourg Airport Findel	18
Figure 3.10: Cargo Carriers at Brussels Airport	19
Figure 3.11: Benelux Imports as Percent of EU Imports from South America, the United States, and the People's Republic of China.....	21
Figure 3.12: The Multimodal Network in Benelux	22
Figure 3.13: Multimodal Transport Mode Distribution	23
Figure 3.14: Interaction of the Key European Rail Freight Market Agents	25
Figure 3.15: Inland Waterways in Benelux and Surrounding Countries	26
Figure 3.16: The Container Ship Jowi	27
Figure 5.1: The Nike EMEA Logistics Center.....	33
Figure 5.2: Apple Distribution Network in Europe.....	35

