



Airneth Seminar UAV's

“Cargo Opportunities – A Shippers’ Perspective”

Rogier Spoel – Policy Advisor Air Freight & Rail Freight
8 December 2016 – 7AM, The Hague



What is a Shipper?

- Represent the logistical interests of manufacturers, producers and traders
- Policy, Innovations, Competition, Education
- Logistical interests in the end:
 - Cost
 - Sustainability
 - Competitive edge



LOGISTICS MAP EUROPE 2016

Map creators: **SCM** SUPPLY CHAIN MEDIA **SMART** LOGISTICS KNOWLEDGE

Urbanization (Euromet)

low high

--- Railway Priority Axis

Motorways of the Sea

Important Inland Waterways

TOP 10 Logistics Locations Europe 2016

1. Venice
2. Rotterdam
3. Antwerp-Brussels
4. Rhein-Ruhr
5. Pan-Regional Romania
6. Paris-France
7. Madrid
8. Liège
9. Frankfurt am Main
10. Central Germany

Major brands with logistics in Venice



Ranking Logistics Performance Indicator (Source: The World Bank)

Top 5 EU Container Seaports (annual TEU 2014)

TOP 10 Fastest growing Container Seaports (2014 TEU 350K+)

Other important Container Seaports

Top 5 EU Cargo Airports (annual Tons 2014)

Other important Cargo Airports

Countries with GDP growth 2006-2014 > 7% (The World Bank)

Countries with GDP forecast growth 2015-2020 > 15% (The World Bank)

Corporate Taxes 2015 (source PwC)

Car Industry

Chemical Industry

High Tech Industry

Aerospace Industry

Prime Rent Warehouses over 5,000 MP

Rents in €/m²/year (source CBRE Q3 2014)

Transport Intensity Tons / inhabitant p.a. (source CBRE DAV 2013)

Manufacturing labour cost per hour 2014 (Source: Oxfam)

Supply Chain Risks (Source: Aon 2014)

Terrorism Political Strike Valuta

Annual TEU 2013 (million)

+3.7% (2012:2.7)

World average: +2.8%

3.6 Europe - North America +5.6% (2012:3.6)

Annual TEU 2013 (million)

Europe - Far East +1.40% (2012:0.3)

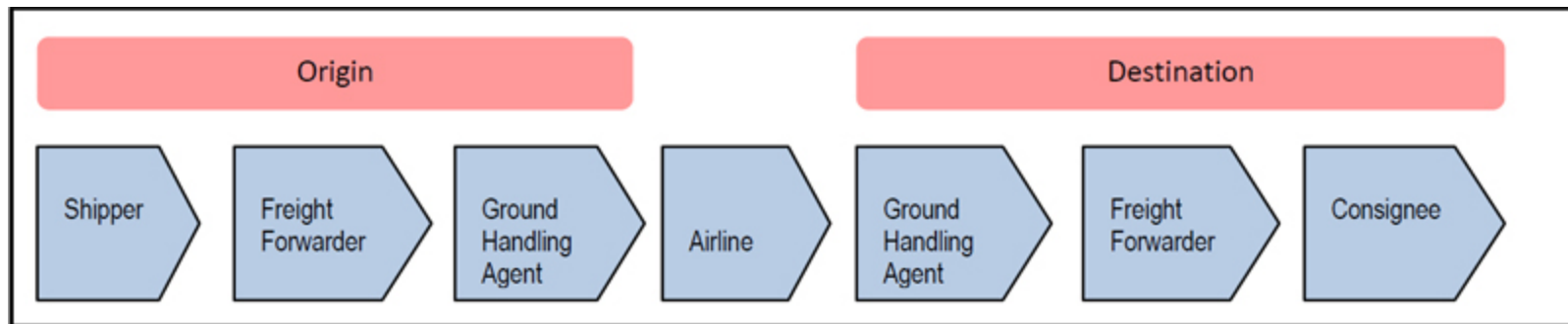
13.7 Far East - Top 4 Sea Ports (North Sea)

14.1 Far East - Europe +2.82% (2012:13.7)



Air Freight Shippers

- High value, time and temperature sensitive
- Necessity: error production cycle, spare parts, contractual obligation
- Rule: Air Cargo represents 1% of the total volume of cargo, but 30% of the total value of cargo
- Schiphol 2015: 1,6 million tonnes of air cargo



4 Air Freight Pillars

Perishables



High Tech

ASML



Pharma



abbvie



Fashion



ZARA



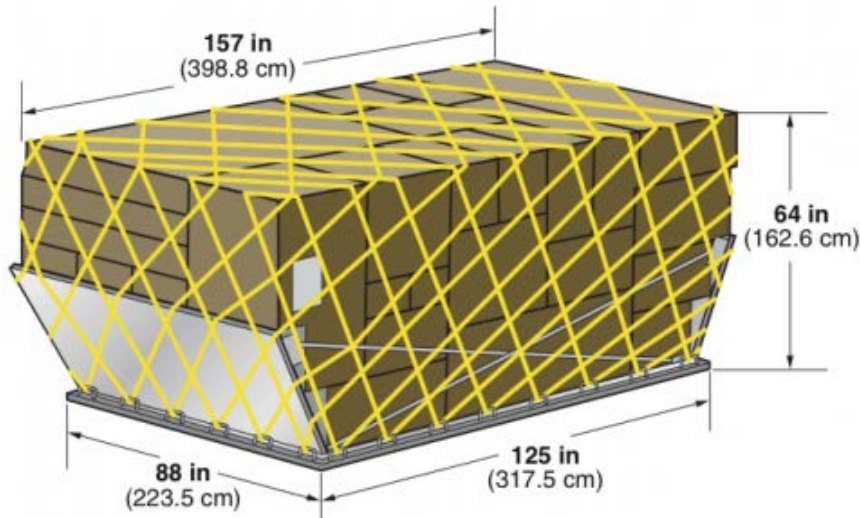
The 5th Air Freight Pillar – E-Commerce

- Massive increase in E-Commerce Air Freight
- Operated Express Companies: FedEx (TNT), UPS, DHL
- Amazon, Alibaba, EBay – B2B, B2C, C2C
- Challenge Customs and Security



Downsides Air Freight

- Expensive – risk, damages, handlings
- Sustainability
- Unpredictable / lack of Transparency
- Tension passenger market
- Complex: documents, balancing



Opportunity 1: Lithium-Ion Batteries



Opportunity 2: Medical Isotopes



Opportunity 3: Cargo Streams

- Production countries: Bangladesh, Kazakhstan, Russia, Parts of China, Japan, India
- Intra-Europe – Air Cargo Trucking



Opportunity 4: Modular Cargo

- Multimodal
- No repackaging
- Save time and cost



Opportunity 5: Operator

Shipper

PHILIPS



Integrator

FedEx®



Carrier



Disruptor

UBER
FLEXPORT
NETFLIX

Freight
Forwarder



KUEHNE+NAGEL



Challenges UAV Cargo

- Air Traffic Management: capacity, safety
- Conditions: temperature, shock proof
- Infrastructure: landing strips, windmills, powerlines
- Digitalization: track and trace, automatic data exchange)
- Cost: reduction administrative burden
- Sustainability: type of fuel, carbon footprint





www.evo.nl

Email: r.spoel@evo.nl

LinkedIn: [Linkedin.com/in/rspoel](https://www.linkedin.com/in/rspoel)

Twitter: [@rogierspoel](https://twitter.com/rogierspoel)

