



Government of Flanders - Belgium

Transport and logistics in **Belgium**



Foreword

Belgium is undeniably a small country. Nevertheless, it offers countless advantages.

Strategically located in the heart of the European Union, it counts, compared to its size, an impressive number of seaports and airports which are buzzing with activity. Its road, waterway and rail networks grant rapid access to a market which has a tremendous purchasing power. This highly regarded infrastructure is complemented by a well-qualified and bilingual, even trilingual workforce, which stands out for its high level of productivity.

Belgium accommodates both transport companies and freight forwarders. Whilst the former provide local transport services for themselves or for third parties, the latter offer global solutions much appreciated by foreign companies. As a consequence these corporations, aware of the logistical hub Belgium provides, have already created or wish to develop distribution centres in Flanders, Wallonia or close to the port of Brussels.

This study on transport and logistics aspires to enhance the awareness of these two areas in which Belgian companies stand out for their adaptability, innovative mind and flexibility. It does not, however, claim to be exhaustive.

It also offers insight into the situation as it is today. In preparing an inventory of sectors as vast and diversified as transport and logistics, one is faced with the difficulty of fixing on paper a world that is in constant movement.

In order to have up-to-date information, to find possible transport organizers, to complete certain data or, for a closer examination of a mode of transport, the Regions are essential representatives. They can supply additional and detailed information, even introduce interested parties to the right federation. This study also includes many websites which offer a first lead into the fast-moving world of transport and logistics.

- ▶ [Part 1: Transport](#)
- ▶ [Part 2: Logistics](#)



PART 1

Transport An exceptional infrastructure

INTRODUCTION

Transport in its various forms is vital to any economy. Transport keeps it moving. Without transport, economic life would quickly grind to a halt. Transport is essential not only for economic growth but also for commercial and cultural exchanges. It is also at the heart of European politics. The opening of national borders and the availability of affordable transport have given European citizens a degree of mobility never reached before. With the removal of barriers between Member States, persons and goods can now circulate freely.

Mobility has become the keyword of the 21st century. Wealthy countries are all countries where mobility has become a reality. The rapid, easy transport of people and merchandise stimulates the employment market and tightens links between different hubs of competitive business. Mobility means a better quality of life.

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Transport in the European Union

For nearly 30 years, the European Community has been unable to implement the Common Transport Policy provided for by the Treaty of Rome of 1957. It was only in December 2000 that the historic decision was taken to open up the rail freight market completely in 2008. The Treaty of Maastricht introduced also the concept of a trans-European network, which made it possible to come up with a Masterplan for transport infrastructure at European level, with the help of Community funding.

During the past ten years, the EU has opened up national transport markets to competition across the Union. Whilst the liberalization of the rail freight market is recent, the road and air sectors have long since ceased being the monopoly of national companies.

Nowadays, freight haulage companies can operate outside their country of establishment without having to return empty from international deliveries. Liberalization of air transport has intensified competition and lowered tariffs, whilst increasing the number of connections between Member States. In March 2003, an initial package of measures aimed at liberalizing the use of the rail infrastructure came into force, opening up to competition 70% to 80% of rail freight transport on the most important lines.

But liberalization has not resolved every problem. Apart from congestion, there remains the problem of the preponderance of road transport over other forms of transport, of pollution and the segmentation of transport systems.

The transfer of freight and passengers from roads to other less polluting forms of transport is an essential part of any sustainable transport policy. Another element will be the ability to integrate different forms of transport, combining road and rail, sea and rail, and rail and air.

The EU has set itself the objective of reducing road transport's share in the long-distance transport of goods and passengers, of increasing the share of rail and of replacing certain short-distance passenger flights by rail connections.

Key figures for the EU

- the transport sector represents around € 1,000 billion, that is over 10% of the Gross Domestic Product (GDP) of the EU;
- it employs 10 million people;
- transport is a major contributor to climate warming;
- transport is accountable for 71% of oil consumption in Europe and is responsible for a quarter of CO₂ emissions;
- 72% of inland freight transport is carried by road, 17% by rail, 5.5% by inland waterway and 5.5% by pipeline;
- 92% of inland passenger transport is carried by road (83% by private car and 9% by bus and coach) and 8% by rail (7% by railway and 1% by tram or metro);
- 19% for freight and 13% for passengers: the increased need for mobility since 1995 (excluding maritime and air transport);
- inland road transport generates 84.2% of CO₂ emissions attributable
- 5.3%: the reduction in number of fatalities on the road between 2000 and 2002.

Selected EU projects in the transport field

- RFID (Radio Frequency Identification), Galileo, microwave technologies: the introduction of these different tools will make it possible to gather more precise information on the location of vehicles, planes and ships;
- SESAR (Single European Sky Air traffic management and Research): this technology will reduce flight times;
- ERTMS (European rail signalling system): technology aimed at guiding the flow of goods;
- RIS: technology for coordinating inland navigation;
- SAFESEANET: an information system for monitoring sea traffic.

Further information on European transport policy can be found on the website http://europa.eu/pol/trans/index_fr.htm.

Transport in Belgium

2.1. TRANSPORT AND STATISTICS

Transport falls into section 1 of the NACE classification: transport, storage and communication.

This section is subdivided into:

1. land transport (60)
2. water transport (61)
3. air transport (62)
4. auxiliary transport services (63)
5. postal and telecommunication services (64)

Only subdivisions 60, 61, 62 and 63 will be examined in the pages below.

Table 1: Turnover of the transport sector (in EUR millions)

NACE	Description	2004	2005	in %	Ist half 2005	Ist half 2006	in %	Weight of sector in 2005 (in %)
60 to 63	TOTAL TRANSPORT	53,750.3	59,674.6	11.0	28,523.9	32,340.6	13.4	100.0
60	Land transport	12,603.4	12,665.8	0.5	6,186.2	6,568.0	6.2	21.2
60.1	Rail transport	1,19.0	1,067.0	- 10.6	517.6	542.8	4.9	1.8
60.2	Urban and road transport	11,328.3	11,520.5	1.7	5,631.1	5,983.9	6.3	19.3
60.3	Transport via pipelines	82.2	78.3	- 4.7	37.5	41.3	10.1	0.1
61	Water transport	2,878.6	3,601.9	25.1	1,595.3	1,807.0	13.3	6.0
61.1	Sea and coastal transport	2,646.0	3,323.7	25.6	1,455.5	1,661.7	14.2	5.6
61.2	Inland water transport	232.6	278.2	19.6	139.9	145.3	3.9	0.5
62	Air transport	1,692.6	3,253.5	92.2	1,374.5	1,733.7	26.1	5.5
63	Auxiliary transport services	36,575.7	40,153.5	9.8	19,367.8	22,232.1	14.8	67.3
63.1	Handling and storage	7,862.5	8,410.8	7.0	4,092.1	4,380.4	7.0	14.1
63.2	Other transportation support activities	1,657.4	2,580.7	55.7	1,035.4	1,327.7	28.2	4.3
63.3	Travel agencies and tour operators	5,040.9	5,460.8	8.3	2,739.4	2,884.3	5.3	9.2
63.4	Organization of freight transport	22,014.9	23,701.1	7.7	11,501.0	13,639.7	18.6	39.7

Source: Panorama de l'économie belge - SPF Economie - <http://economie.fgov.be>

The transport sector has grown significantly over the past decade, and is forecast to continue to increase in the coming years. According to FEBIAC (Belgian Automobile and Cycle Federation - see Road Transport : Professional Federations), Belgium is expected, with the enlargement of the European Community, to absorb around 70% of the additional goods traffic over the next 20 years, that is a growth of 2.5% a year.

2.2. INTERMODAL COMPARISON

An intermodal comparison made by the Economics department of the Belgian Federal Government (SPF/FOD Economy) showed the supremacy, in 2004 in Belgium, of road transport compared with rail and inland waterway transport. Inland navigation is, however, slowly increasing its performance, both in tonnes transported and tonne kilometres.

Table 2: Intermodal comparison

Form of transport in %	1999	2000	2001	2002	2003	2004
Quantities transported (in 1000 tonnes)						
Inland navigation	18.6%	17.7%	19.2%	20.0%	20.3%	21.4%
Rail	10.0%	9.0%	8.5%	8.5%	8.2%	8.4%
Road transport (a) (b)	71.4%	73.4%	72.2%	71.6%	71.5%	70.2%
- inland traffic	63.4%	63.8%	61.6%	63.2%	61.5%	56.5%
- incoming	14.6%	14.9%	15.3%	15.0%	15.1%	16.2%
- outgoing	17.6%	18.0%	19.2%	18.2%	17.8%	18.3%
- transit without transhipment	4.4%	3.2%	3.8%	3.6%	5.6%	8.9%
Tonne kilometres (in million tkm)						
Inland navigation	11.5%	11.1%	11.5%	12.2%	12.4%	11.9%
Rail	13.2%	11.7%	10.5%	11.0%	10.9%	10.8%
Road transport (a) (b)	75.3%	77.2%	78.0%	76.8%	76.6%	77.3%
- inland traffic	45.1%	46.4%	47.0%	47.8%	45.0%	42.3%
- incoming	21.9%	22.1%	21.2%	21.3%	21.5%	51.0%
- outgoing	26.4%	26.8%	26.5%	25.8%	25.5%	112.9%
- transit without transhipment	6.6%	4.7%	5.3%	5.1%	8.0%	48.6%

Source: Directorate-General Statistics and Economic Information and SNCB/NMBS
 (a) transport with vehicles less than 1 tonne
 (b) from 2004, for EU-25 countries

As the table above shows, the share of the three forms of transport in the total national tonnage of 691.840 million tonnes (71 billion tkm), is as follows

- 21.4%: inland navigation
- 8.4%: rail
- 70.2%: road.

Total tonnage carried on the Belgian inland waterway network, regardless of flagging, amounted in 2004 to 147.766 million tonnes, equal to 8.5 billion tonne kilometres. This breaks down into 66.794 million tonnes of imports, 41.078 million tonnes of exports, 35.748 tonnes of internal traffic and 4.146 million tonnes of transit traffic.

Although increasing, intermodal transport remains quite marginal in Belgium.

Right now 64% of containers are sent by road, 28% by inland waterway and just 8% by rail, with the share of inland waterway traffic tending to increase to the detriment of railways. Everything is being done, however, to improve rail transport from the port of Antwerp and to increase its use, with a target of 20%.

2.3. PRODUCTION, ADDED VALUE AND EMPLOYMENT

According to SPF/FOD Economy (Panorama de l'économie belge 2006 - p. 411 to 424), the **production** of the transport and communication sector¹ in Belgium, amounted to € 57.3 billion in 2005. This is 7.8% more than in 2004. These production figures have been growing continuously since 2002.

Still in 2005, **gross value added** produced by the sector reached € 22.4 billion, equivalent to 8.4% of the national gross added value.

When it comes to **investment**, it should be noted that transport and communications remain a high capital intensity sector, with an investment rate of 34.6% in 2005 compared with an average 22% for the national economy as a whole.

In 2005 the transport sector counted **8,396 employers and 185,004 work posts**. SMEs represented over 95% of the companies in the sector. These have created, however, just 35% of the number of jobs in the sector, with the remaining 65% produced by major enterprises, which represent just 5% of the companies in the sector by number.

¹ For production, gross added value and the investment rate, no distinction is made in Section I of the NACE classification, transport and communications, between the NACE codes for transport and those for postal services and telecommunications. Section I of the NACE classification does not provide a sufficient level of differentiation for separating out the transport sector in the strict definition of the term. (cfr SPF/FOD Economie)

From 2005 (1st half) till 2006 (same period), total employment in the sector rose, according to SPF/FOD Economy, by just 0.3%. Employment in the land and water transport sectors is reducing. The air transport and auxiliary transport services segments, on the other hand, grew by 2.3% and 5.6% respectively.

Table 3: Employment in the transport sector and its sub-sectors

NACE	Description	2004	2005	in %	Ist half 2005	Ist half 2006	in %	Weight of sector in 2005 (in %)
60 to 63	TOTAL TRANSPORT SECTOR	184,471	184,319	- 0.1	185,715	188,153	1.3	100.0
60	Land transport	127,623	125,347	- 1.8	127,679	127,259	0.3	68.0
61	Water transport	2,827	2,785	- 1.5	3,003	2,956	- 1.6	1.5
62	Air transport	4,853	4,946	1.9	5,040	5,157	2.3	2.7
63	Auxiliary transport services	49,168	51,241	4.2	49,993	52,781	5.6	27.8

Source: ONSS/RSZ

The current objective in the transport area is, as already mentioned at EU level, to stimulate the transfer from road transport to rail, inland waterway and marine navigation and to combine forms of transport (intermodal transport).

Despite the efforts made to achieve a more sustainable distribution of transport modes by means of a policy encouraging rail and water transport rather than road transport, this latter form of transport will continue, however, to grow faster than the other forms of transport, due to:

- the recent choice of many multinationals to install their European distribution and logistics centres in Belgium;
- Belgium's exceptional geographic situation;
- the quality of its road network;
- its logistics know-how;
- the rapid expansion of the Port of Antwerp, which is one of the main ports of entry into Europe for container traffic from overseas, and in particular from the People's Republic of China.

2.4. TRANSPORT AND THE BALANCE OF PAYMENTS

The National Bank of Belgium has produced a table showing the development of service income and expenditure in the transport area. This table is shown below.

Further information regarding the table.

The general heading "Transport" covers three modes of transport.

These are:

- sea transport (sea and coastal transport, but not inland navigation),
- air transport and
- other forms of transport. These are
 - international road transport,
 - railways,
 - pipelines,

- space navigation (satellites),
- inland navigation.

The headings "passenger transport" and "freight transport" do not require further comments. Related services cover a huge range of services offered in seaports and airports and other distribution centres. These include loading and unloading, storage (for example cold storage), packaging for final distribution and, more generally, all payments linked to transshipment from one means of transport to another. Ship repairs, fuel and other goods purchased in port are not included here, but under the heading "goods". Freight insurance is included under "Insurance".

The hiring of crewed modes of transport (ships, planes) is part of the "Transport" heading, whilst uncrewed hiring is classified under "Other commercial services, rental of movable goods".

Freight transport by professional courier services is not considered as transport, but constitutes a separate balance of payments heading.

BALANCE OF PAYMENTS DEPARTMENT



13/07/2007

Details of TRANSPORT

Period from 2004 to 2006 (in thousands of EUR)

	2004			2005			2006		
	Income	Expenditure	Balance	Income	Expenditure	Balance	Income	Expenditure	Balance
Current operations	285,607,427	275,440,866	10,166,561	310,313,637	302,662,520	7,651,117	331,744,345	324,189,972	7,554,373
Services	42,396,452	39,475,347	2,921,105	45,006,485	41,189,753	3,816,732	47,207,198	42,133,398	5,073,800
Transport	10,492,086	8,899,714	1,592,372	11,135,801	9,913,148	1,222,653	12,400,052	10,351,926	2,048,126
1. Sea transport	5,394,059	4,467,134	926,925	5,694,684	4,799,197	895,487	6,147,938	4,743,136	1,404,802
1.a Passengers	1,801	23481	-21,680	5,433	32,248	-26,815	3,614	23,859	-20,245
1.b. Freight	4,228,786	4121993	106,793	4,202,700	4,260,282	-57,582	4,396,476	4,101,588	294,888
1.c Other	1,163,472	321660	841,812	1,486,551	506,667	979,884	1,747,848	617,689	1,130,159
2 Air transport	1,570,497	2,096,719	-526,222	1,586,787	2,642,255	-1,055,468	1,745,710	3,018,561	-1,272,851
2.a Passengers	635782	1,107,064	-471,282	730,893	1,337,419	-606,526	930,401	1,719,641	-789,240
2.b Freight	393863	367,268	26,595	434,577	593,029	-158,452	468,730	723,309	-254,579
2.c Other	540852	622,387	-81,535	421,317	711,807	-290,490	346,579	575,611	-229,032
3 Other forms of transport	3527530	2335861	1191669	3854330	2471696	1382634	4506404	2590229	1916175
3.a Passengers	70258	78,718	-8,460	99,952	99,745	207	110,756	98,785	11,971
of which road transport	40385	40,317	68	72,653	61,262	11,391	108,423	85,414	23,009
3.b Freight	2804651	2,075,483	729,168	3,018,521	2,188,164	830,357	3,294,906	2,257,544	1,037,362
of which road transport	2437947	1,884,713	553,234	2,685,421	2,094,723	590,698	3,030,623	2,238,635	791,988
3.c Other	652621	181,660	470,961	735,857	183,787	552,070	1,100,742	233,900	866,842
of which road transport	351638	165,752	185,886	414,105	176,514	237,591	735,255	204,815	530,440

2.5. FEDERAL PUBLIC SERVICE IN CHARGE OF TRANSPORT

The **SPF/FOD Mobility and Transport** was set up in 2001 with the aim to prepare and implement a federal mobility policy serving citizens, businesses and the Belgium's economy. Other targets of this policy are: safety, environment, social issues and an optimal integration of modes of transport. Freight transport is a priority area in managing responsible mobility. This is why the **Regions** apply the rules issued by the SPF/FOD Mobility and Transport, which define the regulations applying to the different forms of transport and the transport of dangerous goods.

The SPF/FOD Mobility and Transport publishes the list of licensed freight haulage companies, forwarding agents and brokers. This is a perpetually changing field, permanently analysed by four institutes (of road haulage, for boat transport, for coach and bus transport, and of the forwarding agents) which have been set up jointly by the federal authorities and by the professional associations in the transport sector.

Federal Public Service (SPF/FOD) for Mobility and Transport

City Atrium - Rue du Progrès 56
1210 Brussels
Tel: +32 2 277 31 11
Fax: +32 2 277 40 05
infor@mobilite.fgov.be
www.mobilite.fgov.be



The SPF/FOD has been subdivided into 4 directorates-general in function of the mode of transport. The addresses of the Directorates-General are:

Directorate-General for Air Transport (DGTA/DGLV)

Centre Communication Nord- 2nd floor
Rue du Progrès 80, boîte 5
1030 Brussels
Tel: +32 2 277 43 11
Fax: +32 2 277 42 59
info.air@mobilite.fgov.be

The DGTA/DGLV manages the safe, well-ordered, economic and sustainable development of civil aviation. It sees to the strict application of all technical regulations in view of developing and maintaining a high level of air security and safety. These regulations cover aircraft navigability, maintenance and operating standards, airports, aeronautical sports, personnel qualifications and environmental preservation.

Directorate-General for Marine Transport (DGTM/DGMV)

Rue du Progrès 56
1210 Brussels
Tel: +32 2 277 31 11
Fax: +32 2 277 42 59
info.mar@mobilite.fgov.be

The DGTM/DGMV's mission is

- to support the development of a Belgian federal, European and global navigation policy, and
- to ensure its implementation. The aim is to satisfy mobility needs and to secure a navigation industry offering optimal safety and security, representing a minimum burden on the environment and able to remain competitive.

Directorate-General for Land Transport (DGTT/DGVL)

Rue du Progrès 56
1210 Brussels
Tel: +32 2 277 31 11
Fax: +32 2 277 42 59
info.trans@mobilite.fgov.be

The DGTT/DGVL's goals cover:

- the regulatory aspects of rail, road and inland waterway transport,
- the management and control of licensed professions.

The DGTT/DGVL's missions also ensures the coordination of land transport policy as well as the promotion of combined transport modes.

Directorate-General for Mobility and Traffic Safety (DGMSR/DGMVV)

Rue du Progrès 56
1210 Brussels
Tel: +32 2 277 31 11
Fax: +32 2 277 42 59
info.mar@mobilite.fgov.be

The DGMSR/DGMVV's' objectives can be summarized as follows:

- promoting sustainable mobility through an integrated approach,
- increasing the safety of all public road users and
- contributing to the development of Brussels as a national and European capital.

The DGMSR/DGMVV's responsibilities include the distribution of statistical and other studies. The Directorate general has published the following brochures:

- Parc des véhicules utilitaires (statistics on utility vehicles);
- Relevé des kilomètres parcourus par les véhicules (vehicle mileage statistics);
- Recensement annuel de la Circulation 2005 (annual traffic census);
- Statistiques économiques 2005 du transport exceptionnel (statistics on special transport).

2.6. REGIONAL AUTHORITIES IN CHARGE OF TRANSPORT



IN BRUSSELS-CAPITAL

Administration de l'Équipement et des Déplacements (AED)

CCN - Rue du Progrès 80/bte1

1030 Brussels

Tel: +32 2 204.21.11

aed@mrbc.irisnet.be

www.Brussels.irisnet.be

Port of Brussels

Place des Armateurs 6

1000 Brussels

Tel: +32 2 420 67 00

Fax: +32 2 420 73 81

portofbrussels@port.irisnet.be

www.portofbrussels.irisnet.be

In the field of transport and logistics, it should be noted that, in accordance with the transportation agreement between the Federal State and the Brussels-Capital Region (BELIRIS), the Transport Infrastructure Directorate (DIT) of the SPF/FOD Mobility and Transport carries out a certain number of studies related to the Brussels-Capital area in order to develop infrastructures and mobility and to enhance the value of heritage assets.



IN FLANDERS

Departement Mobiliteit en Openbare Werken

Graaf de Ferrarisgebouw

Koning Albert II-laan 20 bus 2

1000 Brussels

Tel: +32 2 553 71 02

Fax: +32 2 553 71 05

mobiliteit.openbarewerken@vlaanderen.be

<http://www.mobielvlaanderen.be>

On <http://www.vlaanderen.be/adressen>, under "Mobiliteit en Openbare werken" several pages of addresses of bodies can be found. These organisations are in charge of mobility, road safety and traffic in Flanders.



IN WALLONIA

Ministère de l'Équipement et des Transports

Direction générale des Transports

Division de l'Exploitation

Direction du Transport des Personnes

Boulevard du Nord 8

5000 Namur

Tel: +32 81 77 31 83

Fax: +32 81 77 39 66

intermet@met.wallonie.be

<http://met.wallonie.be>

Freight transport is of vital importance for managing mobility. For this reason Wallonia applies the rules issued by the SPF/FOD Mobility and Transport.

2.7. OFFICIAL BODIES - PLATFORMS

The three official bodies cited below are meeting platforms that have been created on the initiative of the public authorities and the private sector. What they have in common is that their members are only federations and not individual businesses.

2.7.1. ITR-IWT

Institut du Transport Routier (ITR) ASBL
Instituut voor Wegtransport (IWT) vzw
Road Transport Institute

Rue Archimède 5
1000 Brussels
Tel: +32 2 234 30 10
Fax: +32 2 230 75 34
info@iwt-itr.be

www.iwt-itr.be



ITR/IWT (Road Transport Institute) is a non-profit association created in 1966.

Membership of the ITR/IWT's Board of Directors is equally divided between representatives of SPF/FOD Mobility and Transport and the main road haulage associations (FEBETRA, SAV, UPTR).

Also represented at the ITR/IWT General Meeting are the recognized trade unions in the sector (BTB/UBOT and ACV/CSC-TRANSCOM) and the professional federation of relocation firms (BKV/CBD). Thanks to the composition of its Board of Directors and its General Meeting, the ITR/IWT has been, for nearly 40 years, a discussion platform for all parties concerned with professional road haulage.

The ITR/IWT is a member of the European Transport Training Association (**EuroTra**), of the International Road Transport Union (**IRU**) and of the Institut du Droit international des Transports (Institute of International Transport Law - **IDIT**).

2.7.2. ITB

Institut pour le Transport par Batellerie ASBL (ITB)
Instituut voor het Transport langs de Binnenwateren (ITB) vzw
Inland Waterway Transport Institute

Drukpersstraat 19 rue de la Presse
1000 Brussels
Tel: +32 2 217 09 67
Fax: +32 2 219 91 87
itb-info@itb-info.be

www.itb-info.be



The Institute's main mission is to promote all the assets of inland navigation and find constructive solutions ensuring its development, given the economic, legal and social implications of this sector.

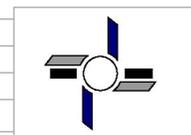
The ITB issues various publications encompassing the Institute's activities and tasks and giving an overview of the most significant data in the sector such as an annual report, a statistical report, press reviews, legal information, quarterly ITB-Info bulletin, a memorandum and syllabi.

2.7.3. IBOT-BITO

Institut belge des Organismes de Transport (IBOT)
Belgisch Instituut der TransportOrganisatoren (BITO)

Rue Archimède 5 - bte 2
1000 Brussels
Tel: +32 2 230 30 43
Fax: +32 2 230 30 53
info@ibot.be

www.bitto-ibot.be



IBOT/BITO was set up in 1992 to conduct, promote and coordinate technical, economic and legal studies, surveys and research in order to organize the most optimal transport of freight. IBOT/BITO cooperates with the public authorities in organizing and promoting the profession of transport contractor.

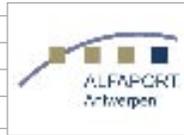
The Institute also produces interesting publications such as:

- Performance indicators
- Socio-economic analysis of the transportation contracting sector - 2007
- "Transport & Logistics" support measures
- Survey of licence-holders (2004)
- The new Belgian general freight forwarding conditions

Full members:

Alfaport Antwerp

De Federatie van havengebonden en logistieke ondernemingen
Brouwersvliet 33 bus 8
2000 Antwerp
Tel: +32 3 205 18 80
Fax: +32 3 231 27 52
info@alfaportantwerpen.be
www.alfaportantwerpen.be



BAFI

Belgian Airfreight Institute
Building 720 B
1931 Brucargo
Tel: +32 477 32 80 85
Fax: +32 16 60 54 83
info@bafi.be
www.bafi.be



BCA

Belgian Courier Association
Avenue Louis Gribaumont 1 bte 2
1150 Brussels
Tel: +32 2 762.65.22
Fax: +32 2 772.11.26
info@b-c-a.be
www.b-c-a.be



BELTOP

Belgian Transport Operators – formerly Chambre syndicale de Transport de Brussels
Avenue du Port 104-106
1000 Brussels
Tel: +32 2 426 20 46
Fax: +32 2 426 25 19
beltop@skynet.be

CEB

Confédération des Expéditeurs de Belgique
Brouwersvliet 33 bus 1
2000 Antwerp
Tel: +32 3 233 67 86
Fax: +32 3 231 82 02
E-mail: ceb@vea-ceb.be
www.vea-ceb.be



CSC/ACV TRANSCOM

CSC/ACV Transport and Communication
Resulting of the merger of the SCCC (Christian Communications and Culture Trade Union) and the CVD (Christian Federation of Transport and Diamond Workers), CSC/ACV Transport and Communications protects the interests of employees in 8 different groups through 14 regional secretariats across Belgium.

Galerie Agora
Rue du Marché aux Herbes 105 bte 40
1000 Brussels



BFTB/FBOTF

Fédération belge d'Organisateurs de Transports fluviaux
Ankerrui 20 bus 13
2000 Antwerp
Tel: +32 3 233 58 37
fax: +32 3 234 06 33
secretariaat@bftb-fbotf.be
www.bftb-fbotf.be



KBRV-URAB

Union royale des Armateurs belges
Brouwersvliet 33 bus 9
2000 Antwerp
Tel: +32 3 232 72 32
Fax: +32 3 231 39 97
info@brv.be
www.brv.be



UCV

Union de la Navigation continentale
Kleindokkaai 3-5
9000 Gent
Tel: +32 3 213 47 47
Fax: +32 3 233 50 71

VEA

Union des Expéditeurs, Logistique et Agents d'Usines d'Anvers
Brouwersvliet 33 bus 1
2000 Antwerp
vea@vea-ceb.be
www.expan-vea.be

Different forms of transport

3.1. AIR TRANSPORT

3.1.1. PROJECTIONS

Based upon a study of Airports Council International (ACI), air traffic can be expected to increase from 4.2 billion passengers in 2005 to almost 9 billion in 2025. These figures for both 2005 and 2025 need to be divided in half, with the same passengers being counted both on departure and arrival. Again, according to ACI statistics, air traffic will grow by 4% a year, and in Asia by 9%, at least until 2009.

Aircraft movements themselves are expected to rise by just 2.8%, indicating that larger capacity/better filled aircraft will be used. Cargo operations will increase by 5.4% a year over 20 years. Not all analysts share the same point of view. According to IATA, the difference between this figure and the results for the first quarter of 2007 (+ 2.7%) are due to greater competition from marine transport in the freight sector.

3.1.2. AIRPORTS

Although small in area, Belgium not only counts a number of regional airports but also one of Europe's most modern airports, Brussels Airport.

Brussels Airport

1930 Zaventem
Tel: +32 2 753 41 21
Fax: +32 2 753 41 22
info@brusselsairport.be
www.brusselsairport.be
www.brucargo.be



Charleroi/Brussels South Airport

Building S.7
6041 Gosselies
Tel: +32 71 25 12 11
BSCA@charleroi-airport.com
www.charleroi-airport.com



Liège Airport (S.A.B.)

4460 Grâce-Hollogne
Tel: +32 4 234 84 11
Fax: +32 4 234 84 04
liegeairport@sab.be
www.liegeairport.com



Antwerp International Airport

Luchthavenlei 1
2100 Deurne
Tel: +32 3 285 65 00
Fax: +32 3 285 65 01
antwerpairport@vlaanderen.be
www.antwerpairport.be



Ostend-Bruges International Airport

Nieuwpoortsesteenweg 889
8400 Oostende
Tel: +32 59 55 14 11
Fax: +32 59 55 12 13
ostend.airport@ostendairport.be
www.ostendairport.be



Table 4: Passenger traffic

NUMBER OF PASSENGERS	2004	2005	2006
(departures and arrivals)	18,138,513	18,603,231	19,479,684
Zaventem (Brussels Airport)	15,632,773	16,179,733	16,707,892
Ostend (Ostend-Bruges)	111,175	126,144	146,355
Charleroi (Brussels South)	2,034,797	1,873,349	2,166,360
Antwerp-Deurne	152,682	142,737	147,849
Liège-Bierset	206,986	281,268	311,228

Source: SPF/FOD Mobility and Transport and the Ministry of the Flemish Community (Key figures 2006 - p 17)

3.1.2.1. BRUSSELS AIRPORT

The Brussels Airport Company is a limited liability company which has been granted a licence to operate Brussels Airport from the Belgian State.

Since the end of 2004, 70% of the shares of this company were owned by an Australian investment consortium led by Macquarie Airports (MAp). In November 2007, the investment arm of the Belgian government has agreed to offload part of its 30% holding in the expanding European airport. That will take Map's direct ownership to 59% as part of its strategy to expand across the continent.

The Brussels Airport Company SA is the successor to the limited liability public law company Brussels International Airport Company (BIAC), created in October 1998 from the merger of the ground activities of the Régie des Voies aériennes/Regie der Luchtwegen and the Brussels Airport Terminal Company SA (BATC).

BIAC has been renamed The Brussels Airport Company.

In 2006, Brussels Airport showed clearly improved results thanks to the increased number of direct destinations and frequencies, plus a larger commercial offering and new products and services.

The number of destinations from Brussels Airport was considerably expanded in 2006, with direct flights added to Beijing, Addis Ababa, Palermo, Krakow, Mumbai and Durham Tees Valley. On top of this, Brussels Airport today offers over 100 destinations for less than 100 euro (one-way).

Brussels Airport in figures (2006):

- 16.7 million passengers;
- 719,651 tonnes of freight;
- € 20.77 of income per passenger;
- 51 shops;
- 27 catering outlets;
- 24 service provision companies;
- 1,245 hectares.

Brussels National Airport has three types of airlines:

1. low cost companies like SkyEurope, EasyJet, Atlas Blue, Vueling and Sterling Airlines;
2. charter companies like Thomas Cook and Jetairfly;
3. and lastly, the traditional companies such as Lufthansa, Brussels Airlines, SAS and all the US "major" carriers.

BRUSSELS AIRPORT PARTNERS:

DGTA/DGLV

Directorate-General for air transport (see SPF/FOD Mobility and Transport)

The DGTA/DGLV grants air traffic rights based on European and Belgian legislation and bilateral agreements. Air traffic rights are granted based upon airline's letters of credence and the type of flights (commercial, non-commercial, regular line, charter) carried out.

Belgocontrol

HEAD OFFICE:

Belgocontrol

CCN

Rue du Progrès 80/2

1030 Brussels

OPERATING HQ:

Belgocontrol

Tervuursesteenweg 303

1820 Steenokkerzeel

Tel: +32 2 206 21 11

Fax: +32 2 206 22 88

info@belgocontrol.be

www.belgocontrol.be



Belgocontrol is an independent public company with the following mission statement:

1. To ensure the safety of air traffic in the airspace for which the Belgian State is responsible;
2. To ensure at the airport of Brussels National, the control of movements of aircraft at approach, landing, take-off and on runways and taxiways, together with the guidance of aircraft on aprons and to continue to ensure the safety of air traffic at regional public airports and aerodromes;
3. To provide the aeronautical police and airport inspection services with information concerning aircraft, piloting of aircraft, movements and observable effects of the latter;
4. To provide meteorological information to aircraft operators as well as telecommunication services or other services with air traffic information. Belgocontrol was set up in October 1998, taking over the tasks of the 'air security' department of the former Régie des Voies aériennes/Regie der Luchtwegen. The company has over a thousand employees.



Brussels Slot Coordination

Brussels Airport is a coordinated airport. This means that airlines need to apply for slots before operating flights to and from it. These slots are coordinated by asbl Brussels Slot Coordination – BSC.

For further information: bsc@brucoord.org.

Flanders Airport Region

Promoting the airport region as a prime location and opportunity for investment to foreign investors is the goal of the 'Flanders Airport Region' project, which is supported by the Flemish government.

Flanders Airport Region is an initiative of the Brussels Airport Company, the intermunicipal Haviland body and the local division of VOKA, the Flemish Chamber of Commerce and Industry, whereas the Flemish government remains an important player. The various private and public partners are combining their networks to attract companies, both at home and abroad, to invest in the new and renovated sites of Brucargo, Airport Village and the Meise-Westrode business park. Nearly 110 hectares of new commercial space will be available at these three locations. Two experts will also be recruited in order to attract investors from North America and Asia.

3.1.2.2. CHARLEROI - BRUSSELS-SOUTH AIRPORT

45 km from Brussels, **Charleroi-Brussels-South airport** is a regional airport which specializes in passenger transport to European destinations. It hosts low-cost airlines like Ryanair and Wizzair.

Charleroi airport plays a key role in the Walloon Region's transport network. According to BSCA, the company managing the airport, it welcomed almost 2.2 million passengers in 2006, which is 16% more than in 2005.

Thanks to its partners, Charleroi is linked today to 26 cities (including 9 capitals) and is confirming, more than ever, its place as Belgium's second airport.

Built for almost 5 million passengers a year (7.5 million with the extensions already on the drawing board), the new Charleroi airport will run a new terminal at the end of 2007. The extension of the runway up to 3,200 metres will also improve the facilities.

Gosselies Logistic Park is currently under construction, 2 km from the runways and 5 km from the motorway junction.

3.1.2.3. LIÈGE AIRPORT

Liège Airport is situated at the centre of the European air freight triangle of Paris, Amsterdam and Frankfurt. It is the first airport to focus its development strategy on freight transport. Under the impetus of TNT, which started operating in Liège in 1988, the airport kept on growing. TNT invested € 75 million in an initial phase and has just launched a second € 90 million investment phase. Liège Airport ranks as Europe's 8th largest cargo airport. In 2006, cargo activities rose by 24% compared to 2005.

Liège Airport is today building a new passenger terminal. This investment of € 25 million will double its capacity and enable it to process 1 million passengers a year.

Right next to Liège Airport, a specialized "Liège Logistics" business area has become operational, managed by the intermunicipal economic development organization SPI+.

3.1.2.4. ANTWERP INTERNATIONAL AIRPORT

Operator

Antwerp Air Authority

2 km from the City of Antwerp, Antwerp International Airport (Deurne) is a modern airport, ideal for European scheduled flights and general aviation. Nowadays, there are regular connections on a daily basis.

London, Rotterdam, Manchester and Jersey can be easily reached. Check in is possible up to 30 minutes before take-off.

Infrastructure & location

runway 1510 m - 4954 ft

ILS cat.1

no slots, no congestion

Airlines and destinations

VLM Airlines (London, Manchester) with onward connections to the Isle of Man, Jersey and Liverpool

Welcome Air (Rotterdam)

Abelag

Flying group

Types of cargo

Urgent deliveries of spare parts for industry

Palletizing of air cargo under airway bill.

3.1.2.5. OSTEND-BRUGES INTERNATIONAL AIRPORT

In recent years, Ostend Airport has doubled its capacity, both for freight transport and in terms of numbers of commercial flights.

Today even the largest airplanes can land here.

Ostend-Bruges International Airport specializes mainly in outsized cargo, perishables and livestock. It offers fast turn-around time and guarantees quality services 24 hours a day without slots or congestion. The airport can handle up to 300 tons, and a new business and logistics park has recently been opened for air-related activities.

Although a large part of its activities are focused on cargo transport, Ostend-Bruges International Airport also offers passenger transport facilities.

In 2005, 126,144 passengers took off from Ostend Airport to eight holiday destinations: Alicante, Palma, Tenerife and Gran Canaria in Spain, Antalya in Turkey, Monastir in Tunisia and the Greek islands of Rhodes and Crete.

In the summer of 2006, three other destinations, Bodrum and Izmir in Turkey and Djerba in Tunisia, were added to the offering of flights.

For 2007, Ostend Airport is expecting its passenger traffic to rise by 20% and its freight traffic by 30%. In 2006 the airport hosted 146,355 passengers, which is 16% more than the year before due mainly to the presence of Thomas Cook and Jetair.

INFORMATION SHEET:

- Runway: 3,200 m – 10,500 ft
- Baggage handling time on arrival: 10 minutes
- Number of registration desks: 6
- EU veterinary licence
- Perishable centre: 300 tonnes capacity, approved by the European Commission (2001/812/EC)
- Fuel stops & training

3.1.3. BELGIAN AIRLINES

3.1.3.1.

Brussels Airlines

The Corporate Village

Da Vincilaan 9

1935 Zaventem

Tel: +32 0902 51 600

info@brusselsairlines.com

www.brusselsairlines.com



Brussels Airlines was created on 7 November 2006 following the merger of SN Brussels Airlines, Belgium's largest full service airline, and Virgin Express, the leading European low cost airline. In 2006 Brussels Airlines generated an income of € 892 million and an operating profit of € 14.5 million.

SN Air Holding is the holding company of both companies; 71% is owned by some thirty Belgian companies and public authorities and 29% by the Virgin group and Richard Branson.

At the end of April 2007, the Economic and Monetary Community of Central Africa (CEMAC) selected Brussels Airlines as its strategic partner for its future CEMAC airline. Brussels Airlines recently inaugurated the only direct link between Europe and Bujumbura, increasing to 14 the number of cities served from Brussels Airport.

3.1.3.2.

European Air Transport (EAT)

Hangar 4-5

Brussels National Airport

1930 Zaventem

Tel: +32 2 718 14 14

www.dhl.be



Founded in 1971 and based in Brussels, EAT provides the European express parcel service in Europe for DHL and long-distance flights to the Middle East and Africa.

3.1.3.3.

Thomas Cook Airlines

Avenue de la Woluwe 50

1930 Diegem

Tel: city office: +32 70 223 22

Tel: airport desk: +32 27 532 437

info@thomascookairlines.com

www.thomascookairlines.be





Thomas Cook Airlines Belgium is a Belgian airline founded in 2002. It operates a modern fleet of 6 Airbus A-320 aircraft, all of which are based in Brussels. In five years, Thomas Cook Airlines has flown 4.8 million holidaymakers on 15,354 flights to 45 different destinations on board of its six Airbus A320s. In 2005, TCA transported 1.05 million passengers, giving it a market share of 6.1% at Brussels Airport.

Direct flights from Brussels to: Agadir, Istanbul, Marrakesh and Monastir.

3.1.3.4.

TNT Airways

Aéroport de Liège
Rue de l'Aéroport, building 58
4460 Grâce-Hollogne
Tel: +32 4 239 30 00
Fax: +32 4 239 39 99
www.tnt.com



TNT Airways is a cargo and passenger charter airline based in Liege Airport, Belgium. TNT Airways is a subsidiary of TNT N.V. and was founded in 1999. It is a part of the network of TNT Express. TNT has cargo flights to more than 67 airports every day (mainly European). In May 2004 it started to operate passenger charter flights.

3.1.3.5.

VLM Airlines (Vlaamse Luchtvaartmaatschappij)

Customer Care Department
Airport Building Off 50
2100 Antwerp
customer.service@flyvlm.com
www.flyvlm.com



On February 10th, 2007, VLM Airlines reached an important milestone in its history with the transport of its one millionth passenger on the Antwerp - London City route.

VLM Airlines operated its very first flight from Antwerp to London City in 1993.

Founded: 1992

Hubs: London City Airport

Fleet size: 19

Destinations: 12

Headquarters: Antwerp

Key people: Johan Vanneste (Managing Director), Jaap Rosen Jacobson (Chairman)

3.1.3.6.

TUI Belgium

REGISTERED OFFICE
Jetair SA
Gistelsesteenweg 1
8400 Oostende
www.jetairfly.com



TUI Belgium is the only tourist group in Belgium and Luxembourg to operate in each of the sectors: tour operating (Jetair, VTB), the airline sector (TUI Airlines Belgium) and tourist agencies (World of TUI TravelCenter, Nouvelles Frontières).

Founded: 2003, as TUI Airlines Belgium

Hubs: Brussels Airport

Alliance: TUI Airlines

Fleet size: 8

Destinations: >70

Parent company: TUI Airlines (TUI Group)

Headquarters: Brussels / Zaventem, Belgium

Key people: Gunther Hofman (COO)

3.1.3.7. OTHER AIRLINES IN BELGIUM

Since June all "major" US airlines as **Delta, American Airlines, United, Continental, US Airways** and **Northwest Airlines** fly to Brussels, which is unique for an airport in this category.

In all, Brussels Airport has some sixty airlines including **Jetairfly**.

Its fleet of 8 airplanes will soon increase to 10. In 2006 it transported 4.25 million passengers (1.62 million in 2005). With 423 employees, Jetairfly is expected to increase its headcount by 30% this year.

Jet Airways is another recent addition to this list of companies.

Since August 2007 this airline is operating daily flights from Brussels to Mumbai and New York. It is also planning to link Delhi and Toronto, each time with a stopover in Brussels. In all, this Indian airline is planning to operate ten long distance flights a day, in partnership with Brussels Airlines, from Brussels Airport to destinations in India, the United States and Canada. Code sharing agreements have been signed for Jet Airways flights to Mumbai, Delhi and Toronto and on Brussels Airlines flights to Stockholm, Birmingham, Geneva and



Madrid. Another twenty destinations on the Brussels Air network should follow after approval from the authorities in charge.

Recently, Chinese airline **Hainan Airlines** began offering direct flights starting from Brussels to Beijing.

3.1.3.8. LOW-COST AIRLINES



In 2001 the low-cost Irish airline created its first continental base in Charleroi, with two aircrafts.

Initially, Ryanair provided three return flights daily between Brussels South Airport and Dublin.

With four planes in operation and some 20 destinations from Belgium's second airport, Ryanair estimates that it will have transported almost two million passengers in 2007.

Italy and Spain are the two countries most frequently served from Charleroi.



Starting on 28 October 2007, the Scandinavian low-cost airline Sterling Airlines will offer flights from Brussels to Denmark, Sweden and Norway. Sterling Airlines will provide daily flights to Copenhagen and four flights a week to Oslo and Stockholm.

The following low-cost companies already operate in Belgium



Geneva



Manchester
Vueling Brussels-Spain



Budapest
Krakow
Prague
Vienna

3.1.4. AIRPORT SERVICES

The proper functioning of an airport depends on a whole range of activities and services. These include:

- ground assistance services;
- catering;
- ticketing;
- fuelling;
- aircraft maintenance;
- crew training.

Hereafter some representative airport service companies:

3.1.4.1. AVIAPARTNER

Aviapartner Belgium nv

Brussels National Airport
1930 Zaventem
Tel: +32 2 723 07 70
Fax: +32 2 723 07 29
opsbru@aviapartner.aero
www.aviapartner.aero



CEO: Theo Dilissen

Turnover in 2006: € 280.5 million compared with € 275 million in 2005

Number of passengers handled: 28 million (+ 15.7%)

Cargo: 980,000 tonnes compared with 913,000 tonnes in 2005

Employees: 5,266

Airports served: 38

Company's objective: to become the European leader in its sector.

The company already serves 38 airports. Its two priority lines of development are cargo and passenger handling. Other activities like catering are considered to be secondary.

Aviapartner Belgium, whose origin goes back to 1949 (previously Belgavia) offers handling services at 4 Belgian airports: Antwerp, Brussels, Liège and Ostend. At Liège airport, services are operated by Aviapartner Liège, a joint venture with the airport authorities.

3.1.4.2. BRUCARGO

Brucargo Air Freight – Courier Express – East African Cargo

Building 740

1931 Zaventem

Tel: +32 2 752 14 10

Fax: +32 2 751 81 14

info@brucargo.net

www.brucargo.net



Brucargo Air Freight offers the perfect solution for anyone who wants to send worldwide air freight to destinations. Brucargo not only guarantees a flexible service but also offers a range of other advantages such as:

- more than 15 years' experience as a specialist in air freight
- a worldwide network of independent agents
- 2,800 m² of proper storage space
- stock management on request.

Start-up of Brucargo West project

With more than a hundred direct destinations and a total built-up area of 250,000sqm, Brucargo today is the sixth cargo airport in Europe, employing about 7000 people. To meet the growing needs of logistics operators, Brussels Airport now proposes an important extension project for Brucargo.

The Brucargo West project involves a 120,000sqm extension of the existing freight zone with several dedicated logistics buildings. Infrastructure works to connect the extension to the public utilities have already started. The construction of a first 30,000sqm building should be finished in 2008. The building will provide state-of-the-art storage facilities and will fit the requirements of the logistics sector, including office space. Even for logistics purposes, this will be a very large building: 30,000sqm compare to the surface area of six soccer fields.

The total project includes three large logistics buildings - this first building being one of them - and two buildings with apron access that are tailored to the needs of airfreight handling activities.

Besides buildings, this project also includes improved security measures and easy road access, both for people and freight. In the future, the E19 highway will be equipped with improved cloverleaf access and a bridge over the Haachtsesteenweg will provide direct freight access to and from the highway, without traffic lights. With a continuous bus shuttle service to and from the airport, this zone is easily accessible to staff. Brucargo also offers several other services like restaurants, a post office and a temping agency.

The complete Brucargo West area should be operational by the end of 2011. By then the current 250,000sqm built-up surface area of Brucargo will have grown to 370,000sqm

3.1.4.3. CARGO B AIRLINES

Cargo B Head

CARGO B HEAD OFFICE:

Brucargo Building 706 Box 75

1931 Zaventem, Belgium

Tel: +32 2 741 20 18

Fax: +32 2 741 20 10

www.cargob.com



Belgian freight carrier Cargo B Airlines operates cargo flights from Brussels Airport to the most important world markets. Cargo B Airlines is headed by former SN Brussels Airlines and DHL boss Rob Kuijpers and started its activities with two leased Boeings 747s.

Cargo B Airlines flies daily to markets in the Middle East and the Far East, Africa and South America under a Belgian Aircraft Operating Certificate (AOC).

The two Boeing 747s are already the property of 3P Air Freighters Ltd., an investment company controlled by Belgian investment bank Petercam SA/NV.

3.1.4.4. FLIGHTCARE BELGIUM

Flightcare Belgium SA/NV

REGISTERED ADDRESS:

Flightcare Belgium SA/NV

Brucargo Building 704/B22

1830 Machelen-Cargo



OPERATIONAL AND INVOICING:

Flightcare Belgium SA/NV

Brucargo Building 704/B22

1931 Brucargo (Machelen-Cargo)

Tel.: +32 2 788 31 33

Fax: +32 2 788 30 68

www.flightcare.be

Some key figures for 2006:

- 5.4 million passengers;
- 70,000 turnarounds;
- 122,000 tonnes of cargo;
- turnover: € 105 million;
- employees: 1,500 (high season);
- Flightcare is present at 3 airports: Brussels, Liège and Ostende.



Flightcare has two main operating departments:

- Ground Handling
- Cargo Handling

These departments are supported by a "Central Services" unit which combines the Human Resources, Finance, Quality, IT and Commercial departments.

- Flightcare's activities can be summarized as:
- General Cargo, Mail and Courier
- Perishable Handling
- Live Animal Handling
- Special Cargo
- Valuables
- Warehousing, document control and ULD inventory
- Customs Agency and legal representation
- Road Feeder Services
- Full Freighter Services

3.1.4.5. DHL

DHL

DHL Global Forwarding
 Building 720
 1931 Brucargo
 Tel: +32 2 752 02 11
 Fax: +32 2 751 93 83

www.dhl.be



DHL is the global market leader in international express, overland transport and air freight. It is also the world's number 1 in ocean freight and contract logistics. DHL offers a full range of customized solutions - from express document shipping to supply chain management.

DHL transports shipments rapidly, safely and on time all over the world. The basis for this is its comprehensive network, combining air and ground transport for optimal delivery performance. On the one hand, this gives DHL worldwide reach, and on the other, a strong local presence and unique understanding of local markets and customers.

In the logistics area, globalization is creating ever more complex supply chains. Again, DHL's combination of global reach and local knowledge is a key competitive edge. The company also offers a wide range of standardized services as well as tailor-made industry solutions. This is the only way to deliver to the high standards that global customers are demanding.

DHL's international network links more than 220 countries and territories worldwide. Around 285,000 employees are dedicated to providing fast and reliable services that exceed customers' expectations in 120,000 destinations in all continents.

DHL is 100% owned by Deutsche Post World Net.

3.1.5. PROFESSIONAL ORGANIZATIONS

3.1.5.1. AIRLINE CARGO MANAGERS ASSOCIATION OF BELGIUM

ACMAB

Building 704 - Room 155
 1931 Brucargo
 Tel: +32 2 751 52 30

evangelo.kommatas@cathay-pacific.com

3.1.5.2. BELGIAN AIR FREIGHT INSTITUTE

BAFI

Sector organization of air freight companies
 Building 720b
 1931 Brucargo
 Tel: +32 477 328 085
 Fax: +32 16 60 54 83
 info@bafi.be

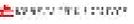
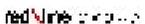
www.bafi.be



BAFI's main objectives are:

- to unite the airfreight forwarding industry in Belgium;
- to represent, promote and protect the interests of this industry by participating as advisors or experts in meetings of national and international bodies dealing with transportation of airfreight;
- to familiarize trade and industry and the public at large with the services rendered by freight forwarders through the dissemination of information, distribution of publications, etc.
- to improve the quality of services rendered by the freight forwarding industry by developing and promoting uniform forwarding documents, standard trading conditions, etc.
- to assist with vocational training for all players within the airfreight forwarding industry, liability insurance problems, tools for electronic commerce, including electronic data interchange (EDI) and bar-coding.
- Organization:BAFI is structured into different committees, that operate as veritable task forces, dealing with every aspect affecting the international movement of airfreight.

Its members are:

- | | | | | | | | |
|---|------------------------------------|---|-----------------------------------|---|------------------------|---|----------------------------|
|  | ABX Logistics |  | Dissaco |  | Herfurth Logistics NV |  | UPS |
|  | AB Logistics |  | ECU AIR NV |  | Jan De Rijk tpt |  | UTI Belgium |
|  | ACS Cargomaster |  | Expeditors Intl |  | JAS Jet Air Service |  | Voka KKHV |
|  | ACP/SAGA |  | Express & Freight solutions |  | KDL Trans |  | WFS Belgium |
|  | Adelantex |  | Febetra |  | Kintetsu World Express |  | YAS Yusen Global Logistics |
|  | AD Handling |  | Flight Care |  | K-Line Air Services |  | Ziegler |
|  | Airpartners NV |  | Frans Maas |  | Kühne & Nagel | | |
|  | Aviapartner |  | Gefco |  | Malca Amit Antwerp | | |
|  | BDP International |  | Géodis Belgium |  | Nippon Express | | |
|  | Brink's Diamond & Jewelry Services |  | Géodis Wilson |  | OIA Norfram NV | | |
|  | Brucargo Air Freight |  | GeoLogistics NV |  | Panalpina | | |
|  | Comexair |  | Gerlach European Customs services |  | Red Line int fwdng | | |
|  | Confreight Air NV |  | Gosselin Airfreight Division |  | Road Air Belgium | | |
|  | Copex Freight Forwarding |  | G.V. International NV |  | S.A.T. Sea Air tpt | | |
|  | Dexx |  | Hankyu International Transport |  | Seagha | | |
|  | DHL Global Forwarding |  | Hartrodt Belgium |  | S.D.V. | | |
|  | Dachser Air & Sea Belgium NV |  | Hellmann Worldwide Logistics NV |  | Schenker NV | | |
|  | Denny Cargo | | |  | Talon Global Logistics | | |
| | | | |  | TNT Express | | |

Source: BAFI

3.1.5.3. BCA

Belgian Courier Association

Avenue Louis Gribaumont 1 bte 2
1150 Brussels
Tel: +32 2 762 65 22
Fax: +32 2 772 11 26
info@b-c-a.be
www.b-c-a.be



Since 1993 the Belgian Courier Association (BCA) has been the professional organization that defends the rights and interests of the express courier sector in Belgium.

Including in its members the four "integrators" (DHL, FedEx, TPG and UPS), plus Chronopost International, Day by Day Courier, Hays DX, Pack&Go and World Courier, the BCA represents around 95% of turnover in this sector in Belgium.

3.1.5.4. CEB/VBA

Confederation of Belgian Freight Forwarders

Brouwersvliet 33 bus 1
2000 Antwerp
Tel: +32 3 233 67 86
Fax: +32 3 231 82 02
ceb@vea-ceb.be
www.vea-ceb.be



The CEB/VBA was created in its present form on July 5, 1982. The organization brings together the forwarders and customs agents working on Belgian territory.

Members are regional associations of forwarders and customs agents like:

- **ADESO** (Union des Expéditeurs et Agents en Douane de l'Ouest et du Sud de la Belgique - Vereniging der Expeditie en Douane-Agenten van West- en Zuid- België);
- **UEA** (Union des Expéditeurs, Logistique et Agents d'Usines d'Anvers - Vereniging voor Expeditie, Logistiek en Goederenbelangen van Antwerp - Antwerp Freight Forwarding, Logistic and Works' Agents Association);
- **BAFI** (Belgian Airfreight Institute);
- **BELOTRA** (Union Professionnelle Belge des Entreprises de Logistique, de Transport et d'Affrètement - Belgische Beroepsvereniging van Logistiek-, Vervoer en Baanbevrachtingsondernemingen);
- **BELTOP** (Belgian Transport Operators).

Associated members include:

- **BCA** (Belgian Courier Association)

3.1.5.5. CCAB

Contactgroep Cargo Afhandelaren Brussel - Groupe de contact cargo handlers Brussels

ccab@ccab.aero

This de facto association seeks in particular to:

- bring together and act as a platform for cargo handlers at Brussels Airport;
- act as a talking partner with the various official bodies and interest groups;
- represent, promote and defend cargo handlers' common interests;
- improve the services supplied by handlers by developing and stimulating uniform working methods.

The CCAB defends solely handlers' non-commercial interests.

Members are:

- **Aviapartner** - www.aviapartner.aero
- **Flightcare** - www.flightcare.be
- **Skylink** - www.skylinkhandling.nl
- **Swissport** - www.swissport.info
- **WFS** - www.wfsbelgium.com

3.2. LAND TRANSPORT

Land transport covers both road and rail transport. According to a study by SERV¹, this is one of the few branches in the economy to experience a growth in the cumulative employment.

3.2.1. ROAD TRANSPORT

INTRODUCTION

A single figure sums up the level of performance of Belgian road operators: they account for around 20% of all intra-Community road traffic. Belgium therefore ranks second, behind the Netherlands, in the intra-Community road transport league table. Various reasons explain this achievement: Belgium's geographical position, its ports and airports, the road network and the development of logistic centres.

From 1999 till 2005, road transport, expressed in tonne-kilometres, increased by almost 25%. This form of transport still has the lion's share in terms of

¹ Dossier "Indirecte werkgelegenheid", SERV, January 2006
(Sociaal-Economische Raad van Vlaanderen - Wetstraat 34-36 - 1040 Brussels;
Tel: +32 2 20 90 111 ; fax: +32 2 21 77 008)



modality. Even if rail and inland waterway capacities are doubled, this figure is forecast to increase from 42 billion tonnes per kilometre in 2000 to 67 billion in 2020.

Today, road transport represents 78% of all goods traffic, compared with 10% for rail traffic and 11% for waterways. As such it can be considered a driving force of Belgium's economy. The contract "transport and goods handling" sector consists of 9,000 companies employing no less than 60,000 people in Belgium. Despite already having a particularly dense road network, Belgium continues to develop its road infrastructures in order to eliminate missing links and build by-passes and fast through roads.

3.2.1.1. ROAD TRANSPORT STATISTICS

The Mobility directorate of the SPF/FOD Transport and Mobility regularly publishes [road traffic statistics](#) and real time [motorway mobility](#) studies.

Belgium has a vast road network of around 150,000 km, including 1,750 km of motorways. Further details below:

Table 5: Length of the Belgian road network (kilometres at 1 January)

Year: (1)	MW (2)	RR (3a)	RR (3b)	RP (4)	Total 5=3b+4	MR (6)	MR m (7)	MR tr (8)
2004	1747	11627	12531	1349	13880	134940	102160	14365
VL	(r00)867	4952	5372	635	6007	62550	52720	6800
Wal	869	6375	6839	714	7553	70840	47900	7460
Bru	11	300	320(g00)	0	320	1550	1540	105
2005	1747	11627	12531	1349	13880	135745	102764	14365
VL	(r00)867	4952	5372	635	6007	62909	53036	6800
Wal	869	6375	6839	714	7553	71286	48188	7460
Bru	11	300	320(g00)	0	320	1550	1540	105

MW= motorways
 RR= regional roads
 RP = provincial roads
 Total= total numbered, non-motorway
 MR=municipal roads
 MRm= municipal roads – of which metalled
 MRtr= municipal roads – of which trunk roads

Source : SPF/FOD Transport and Mobility

According to FEBETRA, the Belgian federation of road haulage and logistics services providers (see under Federations), the Belgian road freight transport association consists of around 9,000 companies employing 83,000 persons and operating 53,000 vehicles. Of all forms of freight transport, road transport remains the most popular, including in Belgium.

It is also important to know that, according to Febiac statistics, there were no fewer than 3,521 new truck registrations in Belgium in the first half of 2007, compared with 2,209 units in the same period last year. That is an increase of nearly 60%.

Why? It turns out that this year numerous Belgian hauliers decided first to register their trucks in Belgium and then to re-register them in Poland, Lithuania, Slovakia or elsewhere. These figures indicate that while Belgian road transport companies have plenty of work at the moment– and so need sufficient stock – they are increasingly making use of vehicles operated by eastern subsidiaries.

3.2.1.2. FEDERAL BODIES AND RESEARCH CENTRE

A. IBSR-BIVV (BELGIAN ROAD SAFETY INSTITUTE)

IBSR Institut belge pour la Sécurité routière - IBSR
Belgisch Instituut voor de Verkeersveiligheid - BIVV

Chaussée de Haecht 1405

1130 Brussels

Tel: +32 2 244 15 11

Fax: +32 2 216 43 42

www.ibsr.be



The IBSR/BIVV is the body serving the public authorities, and in particular the Federal Public Service (SPF/FOD) Mobility and Transport. As such, the IBSR/BIVV is tasked with preparing and implementing road safety policy.

The IBSR/BIVV's general objective is to improve road safety and quality of life by:

- awareness-raising and education;
- research and advice.

The IBSR/BIVV's other missions are:

- support;
- representation and coordination;
- executing tasks assigned to it by the authorities.

B. ITR-IWT (ROAD TRANSPORT INSTITUTE)

Institut du Transport Routier - ITR Instituut voor Wegtransport - IWT

Rue Archimède 5
1000 Brussels
Tel: +32 2 234 30 10
Fax: +32 2 230 75 34
info@iwt-itr.be
www.iwt-itr.be



The ITR/IWT is a non-profit association which was set up in 1966 as a joint initiative of the public authorities and the private sector.

Its activities can be summarized as follows:

- organizing professional training for the professional road transport industry;
- organizing professional capacity examinations, examinations for hazardous goods (ADR) drivers, and examinations for safety advisers;
- other logistic support activities to the SPF/FOD Mobility and Transport;
- legal and economic studies and surveys;
- technical management of digital tachographs;
- information, documentation and publications.

C. CRR-OWB (BELGIAN ROAD RESEARCH CENTER)

Centre de Recherches Routières - CRR Opzoekingscentrum voor de Wegenbouw - OWB

Boulevard de la Woluwe 42
1200 Brussels
Tel: +32 2 775 82 20
Fax: +32 2 772 33 74
brrc@brrc.be
www.brrc.be



Created in 1952 at the request of the "Federation of Belgian Road Entrepreneurs", in agreement with the highways authority and under the aegis of the SPF/FOD Economic Affairs, the Belgian Road Research Center has retained, from its origins, the very peculiar status of a privately initiated public utility research institute. As such it works in close cooperation with all the parties involved in road construction.

It seeks to be an impartial centre of expertise at the sharp edge of technology in the road sector.

3.2.1.3. PROFESSIONAL ASSOCIATIONS

A. FEB-VBO (FEDERATION OF ENTERPRISES IN BELGIUM)

Fédération des Entreprises de Belgique - FEB Vereniging van de Belgische Ondernemingen - VBO

Rue Ravenstein 4
1000 Brussels
Tel: +32 2 515 08 11
Fax: +32 2 515 09 15
info@vbo-feb.be
www.vbo-feb.be



The FEB/VBO has its own "Telecommunications and Transport (air-waterway-rail-road)" department that closely tracks international, European and federal Belgian transport policy (liberalization, regulatory framework, safety, environmental aspects), including own-account transport, as well as sustainable mobility policy. To help its members, it has created a consultation platform, together with FEBIAC and the SNCB-NMBS holding, to have a better understanding of the problem of mobility in Belgium. This platform has already organized three Rail meets Road symposia. These initiatives are always a big success with both political and economic players.

B. FEBETRA (ROYAL BELGIAN FEDERATION OF ROAD HAULAGE AND LOGISTICS SERVICES PROVIDERS)

Fédération royale belge des Transporteurs et des Prestataires de Services logistiques Koninklijke Federatie van Belgische Transporteurs en Logistieke Dienstverleners

Rue de l'Entrepôt 5 A
1020 Brussels
Tel: +32 2 42568 00
Fax: +32 2 425 05 68
febetra@febetra.be
www.febetra.be



Created in 1946, FEBETRA – the Royal Belgian Federation of Road Haulage and Logistics Services Providers – counts more than 50 people defending the interests of both road haulage and logistics providers. FEBETRA provides members with the assistance they need to allow them to concentrate on their main activity. FEBETRA is the only Belgian road transport federation represented on the IRU (International Road Transport Union).



Its services to businesses include:

- information provided on request;
- legal advice on, among other things, collective labour relations, CMR regulations, insurance, environmental law, etc.;
- subscriptions: useful credit cards for tolls and road taxes in France, Italy, Spain, etc.
- VAT recovery and domestic traffic by foreign haulers (cabotage);
- CMR road transport documents, tachographic disks, guides, atlases, etc.

FEBETRA also has a unit devoted to logistics, called BELOTRA, the Belgian professional union of logistics, transport and transport chartering enterprises.

C. FEBIAC (BELGIAN AUTOMOBILE AND BICYCLE FEDERATION)

Fédération belge de l'Automobile et du Cycle - FEBIAC Belgische automobielen- en tweewielersfederatie

Boulevard de la Woluwe 46, bte 6
1200 Brussels
Tel: +32 2 778 64 00
Fax: +32 2 762 81 71
info@febiac.be

www.febiac.be



ASBL/VZW FEBIAC is the Belgian Automobile and Bicycle Federation. With over a hundred years' experience, it represents the builders and importers of wheeled means of transport (cars, utility vehicles, motorized two-wheelers, bicycles) and their subcontractors in Belgium, at European, international, Belgian federal and regional levels. FEBIAC also organises the Belgian Car and Motorcycle Show which will open to the public on 17 January 2008.

D. SAV

Koninklijke Beroepsorganisatie van de Vlaamse Goederenvervoerders en Logistieke Dienstverleners - SAV

Land van Rodelaan 20
9050 Gent
Tel: +32 9 210 82 10
Fax: +32 9 232 22 79
info@sav.be

www.sav.be



The SAV, which was created in 1933, is the professional organisation of

Flemish transport contractors and logistics services providers, and counts 1600 members. Its main objective is to defend the road transportation profession and combat prejudices that can damage the profession. The organisation is constantly reminding the competent bodies of the importance of road transport for the Belgian economy. Trucks remain an essential element in the process of supplying goods to the final customers, and road transport corresponds to the needs of demanding customers.

The SAV's services include:

- social secretariat;
- VAT recovery,
- dissemination of information in the form of circulars, workshops, SAV News, etc.
- advices;
- licence requests, etc.

E. ITS

The Telematics Cluster/ ITS Belgium

Rue Colonel Bourgstraat 153
1140 Brussels
Tel: +32 2 706 81 40
Fax: +32 2 706 81 42
info@itsbelgium.be

www.itsbelgium.be



The Telematics Cluster / ITS Belgium is a member-organization stimulating innovation and collaboration in the sector of intelligent telematics solutions:

- Intelligent Transport Systems (ITS): Traffic management, E-Tolling, Safety Systems, Mobility Info
- Professional Telematics: Fleet & Mobile Workforce Management, Telematics in the Transport sector and specific markets

The members of the Telematics Cluster form a unique platform of all stakeholders in the business:

- Technology: Mobile Operators, HW, SW, LBS, Integrators
- Users: Automotive, Governments, Fleets, Leasing, Insurance
- Academic Institutes

It is the cluster's mission to assist its members in building a solid future-proof telematics strategy in a European context. ITS Belgium believes in a pragmatic project-based approach, where networking events and individual advice are combined with workshops and validation projects. The Telematics Cluster / ITS



Belgium is supported by the IWT (Institute for the Promotion of Innovation by Science and Technology in Flanders).

F. UPTR (PROFESSIONAL ROAD TRANSPORT UNION)

Union professionnelle du Transport par Route - UPTR

Rue Denis Lecocq
4031 Angleur
Tel: +32 4 361 40 90
Fax: +32 4 367 73 51



Avenue du port 104-106
1000 Bruxelles
Tel: +32 2 420 54 56
Fax: +32 2 420 67 79
info@uptr.be
www.uptr.be

The UPTR's primary missions as a professional federation can be summarized as follows:

- protecting and developing the economic interests of the sector and
- defending its members.

The Transport & Logistics services sector employs directly no less than 90,000 people in Belgium.

At political level (at national, regional and even European level), the UPTR has constantly pleaded for the right of Belgian enterprises to compete with their foreign competitors.

The UPTR forcefully defends the interests of Belgian transporters and logistic services providers in all matters (economic, fiscal, social, environmental, etc.).

Created in 1936, the UPTR operated originally only at regional level. With the constant expansion of its services and national recognition of its defence of the profession, the UPTR's membership has expanded considerably in recent years.

Since 2000, the UPTR has been present in Brussels and Flanders, with growing success. Today it is one of the most representative road hauliers' federations in Belgium.

This objective is inconceivable without offering a complete range of services and high-quality information.

3.2.1.4. TRANSPORT, REGION BY REGION

A. COMPARATIVE SURVEY

In a comparative survey of the 1000 most successful freight companies by Transport Management (see publication), it was found that the Province of Antwerp had the greatest number of freight companies, thanks to its port area. The Province of Antwerp by itself has a 25% share of the Top 1,000 freight haulage contractors, whether in terms of total turnover, manpower or added value.

The Top 1,000 Transport referred to above is a result of the partnership between Trends/Trends-Tendances Top 30,000 and TransportMedia, the transport press market leader.

The ranking of the provinces and Brussels (also to be found on www.transportmanagement.be) was based on the following four criteria:

- 1 = number of companies
- 2 = turnover
- 3 = manpower
- 4 = added value





The ranking results:

	Antwerp	East Flanders	West Flanders
1	252 (25%)	156 (16%)	40 (14%)
2	3,653,279,621 (34%)	1,272,154,144 (12%)	1,165,719,901 (11%)
3	12,038 (26%)	5,420 (12%)	4,481 (10%)
4	1,365,661,507 (37%)	536,401,388 (14%)	344,373,548 (9%)
	Flemish Brabant	Hainaut	Liège
1	110 (11%)	90 (9%)	77 (8%)
2	1,491,475,379 (14%)	572,336,149 (5%)	730,790,759 (7%)
3	7,892 (17%)	3,176 (7%)	3,785 (8%)
4	488,368,846 (13%)	201,932,226 (5%)	236,940,742 (6%)
	Limburg	Brussels	Walloon Brabant
1	74 (7%)	58 (6%)	17 (2%)
2	721,491,370 (7%)	819,792,081 (8%)	160,605,045 (1%)
3	4,524 (10%)	3,369 (7%)	1 181 (3%)
4	256,088,569 (7%)	177,436,083 (5%)	65,255,309 (2%)
	Luxembourg	Namur	
1	5 (1%)	18 (2%)	
2	44,599,022 (0%)	103,145,214 (1%)	
3	269 (1%)	713 (2%)	
4	18,082,438 (0%)	41,067,717 (1%)	



Whereas Flanders has more freight companies than Wallonia (including the largest in size) and larger warehousing capacity, by contrast the scope of services offered on the other hand is wider in Wallonia.

B. FREIGHT COMPANIES

B.1. ACCESS TO THE PROFESSION

No specific regulations exist for companies transporting goods by road for its own account.

Other regulations are applicable for utility vehicle drivers (when not becoming head of a transport company).

Access to the profession and the exercise thereof are strictly regulated.

Information on the specific requirements can be found on website: www.mobilit.fgov.be/fr/route/trans/transpf.htm

B.2. RANKING

The ranking of the largest freight transport companies compiled by **Transport Management** in collaboration with Trends/Tendances (see above) is dominated by the giant Antwerp company **Hesse-Noord-Natie** (HNN), part of the Singapore-based PSA group since 2002.

Intercontainer-Interfrigo ranks second. SNCB/NMBS holds a 11.5% stake in this association of rail companies. It is followed by **Schenker**, **DHL** and **TNT**. The first Belgian company is **ECS European Containers** in 7th position. This company was founded in 1995 and specializes in container shipping between the United Kingdom and the Continent.

Hereafter the Top 20 companies in the Transport Management ranking:

1	Hesse-Noord-Natie
2	Intercontainer-Interfrigo
3	Schenker
4	DHL International
5	DHL Worldwide Express
6	TNT
7	ECS European Containers
8	Van Gansewinkel
9	United Parcel Service
10	ABX Logistics (Belgium)
11	MSCHome Terminal
12	DP World Antwerp
13	Ziegler
14	DHL Express (Belgium)
15	Essers Henri en Zonen
16	SCTN
17	Exel.Eur.Mann.Transp.Serv
18	TRW
19	Gosselin Worldwide Moving
20	Gefco Benelux

The "Truck & Business" journal (see "publications") has also compiled a ranking of transport companies operating out of Belgium, based on turnover and earnings. To be listed, the company must have the NACE-BEL classification 60242 (third party road freight) or 60241 (removals).

Table 6.1: Ranking based on turnover

List of companies by turnover			
1	DHL Global Forwarding	Zaventem	241 753 000.00 €
2	Sita Recycling Services	Beerse	187 855 000.00 €
3	DHL International	Diegem	164 221 000.00 €
4	ECS European Containers	Zeebrugge	135 746 000.00 €
5	Van Gansewinkel Containertransport Vlaanderen	Mol	127 681 000.00 €
6	UPS Belgium	Diegem	120 542 000.00 €
7	ABX Logistics (Belgium)	Brussels	113 761 000.00 €
8	Ziegler	Brussels	112 025 915.00 €
9	DHL Express	Ternat	110 535 000.00 €
10	Essers H.& Zn Int. Transport	Genk	102 752 000.00 €
11	Sita Wallonie	Welkenraedt	97 073 000.00 €
12	DHL Freight (Belgium)	Grimbergen	97 013 000.00 €
13	Frans Maas Gent	Puurs	94 883 000.00 €
14	Gosselin Worldwide Moving	Deurne	89 238 000.00 €
15	Gefco Benelux	Ghislenghien	86 433 000.00 €
16	Federal Express	Brussels	72 351 000.00 €
17	Sarens	Wolvertem	64 368 000.00 €
18	TTS Belgium	Grâce-Hollogne	57 746 000.00 €
19	Biffa Container Transport	Vilvorde	55 206 000.00 €
20	Sitra	Ypres	52 457 000.00 €

Source: www.truck-business.be - Warehouse & Logistics

Table 6.2: Ranking based on earnings

List of companies by turnover			
1	Sita Wallonie	Welkenraedt	6 482 000.00 €
2	Sita Recycling Services	Beerse	5 077 000.00 €
3	DHL Global Forwarding	Zaventem	4 754 000.00 €
4	Gefco Benelux	Ghislenghien	4 416 000.00 €
5	Sarens	Wolvertem	3 318 000.00 €
6	Federal Express	Brussels	2 619 000.00 €
7	Belstor	Genk	2 438 000.00 €
8	ECS European Containers	Zeebrugge	2 330 000.00 €
9	Essers H.& Zn Int. Transport	Genk	2 234 000.00 €
10	Maenhout	Ostende	2 224 000.00 €
11	DD Trans	Zeebrugge	2 050 000.00 €
12	DHL International	Diegem	1 955 000.00 €
13	Halléns	Desteldonk	1 945 000.00 €
14	Exel (Mechelen)	Malines	1 734 000.00 €
15	Salvesen Christian Belgium	Zellik	1 734 000.00 €
16	Huktra	Zeebrugge	1 531 000.00 €
17	Ambrogio	Malines	1 430 000.00 €
18	Furness Logistics Belgium	Desteldonk	1 422 000.00 €
19	Nippon Express Belgium	Zaventem	1 374 000.00 €
20	Bruhn Spedition	Antwerp	1 362 000.00 €

Source: www.truck-business.be - Warehouse & Logistics

Only the Top 20 are shown here. The Top 400 can be found on www.truck-business.be. They are ranked as follows:

1. alphabetically;
2. by specialty;
3. by destination;
4. by turnover;
5. by profits;
6. by investment.

3.2.1.5. BELGIAN PUBLICATIONS OF INTEREST TO TRANSPORT COMPANIES

A. FEBETRA INFORMS ITS MEMBERS BY:

Febetra Flash: Flashes sent by fax or e-mail;

Transpo: This monthly – subtitled the official Belgian journal on transport and logistics – features interviews with haulers, articles on new products, practical advice, a summary on traffic restrictions, etc. It is published in French and Dutch and is distributed on an international scale.

Febetra

Rue de l'Entrepôt 5 A
1020 Brussels
Tel: +32 2 425 68 00
Fax: +32 2 425 05 68
febetra@febetra.be
www.febetra.be



B. LE LLOYD SA

Le Lloyd sa

Vleminkstraat 18
2000 Antwerp
Tel: +32 3 234 05 50
Fax: +32 3 234 25 93
info@lloyd.be
www.lloyd.be

LeLloyd

The newspapers **De Lloyd** (in Dutch) and **Le Lloyd** (in French) have been the source of information for the transport and logistics sector for nearly 150 years. The articles are brief and informative, drawing on the in-depth knowledge of experienced journalists specialising in this field. All transport modes are covered. The readers include shippers (who purchase transport services), forwarders (transport organisers) and transport operators. The newspapers are read in Belgium, the Netherlands, France and 30 or so other countries.

The newspapers De Lloyd/Le Lloyd appear three times a week in a Dutch and French version, on Monday, Wednesday and Friday.

Once per month the newspaper also contains the **Belgian Shortsea Sailing List** with all regular services to European and Mediterranean ports. The Monday issue includes the "**Departure List**" – a list of all ships leaving Belgian ports

for worldwide destinations, as well as a list of companies offering groupage and combined rail/road transport.

Transport Echo is the monthly magazine of De Lloyd.

It supplements the newspaper with analysis, interpretation and comment, as well as in-depth interviews and background information (features and investigations). It appears in Dutch and French, ever since 1945.

This is the ideal medium for closely targeting buyers and sellers of all types of transport-related and logistical services.



De Lloyd and **Le Lloyd** cover a very wide range of transport information. But even this is not enough to present a full picture of the Belgian ports and certain events in all their significance. Hence the **Lloyd Special Reports** in magazine format, published in English. These Special Reports are an excellent opportunity for advertisers to put across their message.



C. MMM BUSINESS MEDIA

MMM Business Media

Complexe Arrobas
Parc Artisanal 11-13
4671 Blegny - Barchon
Tel: +32 4 387 87 87
Fax: +32 4 387 90 87
www.mmm-businessmedia.com



MMM Business Media is the business-to-business communication specialist in three areas: road transport and logistics, vehicle fleets and business premises. Its activities were developed primarily in Belgium and Luxembourg, but are now expanding into publishing and distributing pan-European media.

Mass media are often unsuitable for business decision makers. With precise indicators, practical advice, effective decision-support tools and news from the source in their activity areas, MMM Business Media is able to paint a comprehensive picture of the market.



Below is a list of all **magazines** proposed by MMM Business Media in the areas of vehicles, transport and logistics:

Vehicles and Fleet Management:

- Federauto Magazine
- Fleet & Business
 - Bike & Business
 - Fleet & Business Lessons Guide
- Fleet & Business Directory
- Fleet & Business Luxembourg
 - Luxemburger Fleet Directory
- Fleet Dealers
- Fleet Europe
 - Fleet Europe Directory
 - Special Green Fleet Issue
- Flotas y negocios
- L'utilitaire léger
 - VUL – Guide d'achat

Transport & Logistics:

- Speciaal Transport Magazine
 - Crane Guide
 - Trailer Guide
 - Truck Guide
- Truck & Business
 - Guide d'achat du transport routier
 - TOP 400
- Truck & Business Czech Republic
- Truck & Business Luxembourg
 - Guide d'achat du transport routier
 - Répertoire des transporteurs
- Truck & Business Polska
- Truck Dealers
- Truck Europe
 - Truck Europe – Directory

D. SAV NEWS

SAV

Land van Rodelaan 20
9050 Ghent
Tel: +32 9 210 82 10
Fax: +32 9 232 22 79
info@sav.be
www.sav.be



SAV News is a transport and logistics trade journal appearing 11 times a year and only available by postal subscription. It targets Flemish goods transport and logistics companies, as well as manufacturers and subcontractors in the industry. It is also distributed to a number of ministries, politicians, national and international transport organizations, the police, etc.

SAV News contains articles covering current national and international developments in legal, social and economic fields, as well as articles on vehicle manufacturers, logistics, telematics, training, security and the sector's image.

Other available publications include the following brochures and syllabi:

- Driving times and rest periods

- CMR legislation
- VAT and transport services
- Calculating cost price
- "Advice for the professional truck driver" leaflet.

Flanders' Transport® & Logistics



This annual publication is the road transport bible. It lists alphabetically almost 2,200 Flemish transport companies and logistic service providers, with general data, specialties, destinations and potential warehouse capacity.

The second part is dedicated to information on different countries – licences needed, taxes, cabotage, sanctions on infringement, requirements when transporting dangerous substances, etc.

E. TRANSPORAMA

Transporama Publishing BVBA

Mechelsesteenweg 326/4
2650 Edegem
Tel: +32 3 455 87 95
Fax: +32 3 455 10 87
info@transporama.be
www.transporama.be



Founded in 1981, Transporama Publishing SPRL is a publishing house specialised in road transport. In addition to its magazines Transporama, Chauffeur and Trans Actuel, the company is also responsible for the annual editions of the Belcarboek, the journal of the Euphony Zolder 24 hours race and the Belgian Motorsport Review, a 608 page directory bringing a synopsis of the last motorsport season.

These 5 publications appear both in Dutch and French. Transporama Publishing SPRL has its own printing office and prepress section.

F. TRANSPORTMEDIA

TransportMedia

Z.1.Researchpark 20
1731 Zellik
Tel: +32 2 467 61 60
Fax: +32 2 467 61 62
info@transportmedia.be
www.transportmedia.be





At the end of May 2007, TransportMedia published the 6th edition of "**Transport in Belgium - l'annuaire des gestionnaires en transport 2007**" (the transport managers' directory). This professional guide acts as a reference for all managers of utility vehicle fleets (both light and heavy). For each sector, interested readers will find a list of useful links and a complete editorial panorama: appraisals, news, trends, coordinates, etc.



In collaboration with Trends/Trends-Tendances, Transport Management (no. 43) published the first **TOP Transport** in June 2007, presenting a ranking of the 1,000 largest transport and logistics companies operating in Belgium. This ranking, based on turnover, also provides information on added value and manpower.



On www.trendstop.be, interested readers will find a list of exactly 4,185 transport companies (with a 2005 turnover of more than € 124,000). Other rankings available on www.transportmanagement.be are based on work volumes, female recruitment, etc.

3.2.1.6. AWARDS

A. TRANSPORTMEDIA

The **Best Innovation** prize rewards the transport company which has implemented an innovative project or achieved distinction in such fields as human resources, management or others.

This year the Best Innovation prize went to **Adwance**. Founded 40 years ago, Dubois Dawance Transports (Rochefort) changed its name and logo. The new name: Adwance. The new logo: the ant.

Adwance

Parc Economique 10 B
5580 Rochefort
Tel: +32 84 22 08 58
Fax: +32 84 22 08 75
info@adwance.eu
www.adwance.eu



The **Safety Award**, as the name suggests, goes to the transport company with the most effective investment in safety in the last years. This year's winner is ... **Ninatrans!**

For Ninatrans, road safety is the company's keystone. Every driver (even those with years of experience) is assessed two or three times a year. Two training sessions are organised each month in such a way as to track the performance of the approx. 50 drivers.

Ninatrans SA

Weterbeekstraat 6
3360 Bierbeek
Tel: +32 16 46 80 08
Fax: +32 16 46 00 16
info@ninatrans.be
www.ninatrans.be



B. TRANSPORT & LOGISTICS AWARDS 2007

MMM Business Media as publisher of the two magazines Truck & Business and Warehouse & Logistics bestows each year the Transport & Logistic Awards. The aim of these awards is to focus attention on companies or individuals especially representative of the different branches of the transport and logistics sector and responsible for best practices applicable to the whole industry. The awards went to:

- Haulier of the Year 2007: Jean Vincent (Herstal);
- Truck ICT Award 2007: Transmet (Boutersem);
- Truck Green Award 2007: Van Dievel (St Katelijne Waver)
- Logistics Project of the Year 2007: Ziegler (Aalst);
- Truck Fleet-Owner of the Year 2007: Groep Malysse (Heule);
- Transport Safety Award 2007: NiJ (Riemst);

Haulier of the year 2007

This prize goes to a haulage contractor particularly noteworthy for its excellent management, market approach, social approach and openness to innovation. Founded in September 2000, the transport company **Jean Vincent** is developing its business in national and international transport, logistics and transport equipment leasing. Employing 165 people, it is operating in the Benelux, Germany, France and for the last two years in Slovakia and Poland. The company has two distribution hubs: Eynatten (10,000 m²) and Herstal (40,000 m²).

Summary:

2006 turnover: EUR 32 million

Workforce: 165

Vehicles: 102

Customers: Within a radius of 1,100 km around Herstal

Vincent Logistics

Parc industriel des Hauts-Sarts - Première Avenue 32
4040 Herstal

Tel: +32 4 256 99 10

Fax: +32 4 256 99 28

jean.vincent@vincentlogistics.com

www.vincentlogistics.com



Truck ICT 2007

For the transport sector good ICT management implies constant efforts in professionalizing services in response to customers' growing requirements for ever greater responsiveness and traceability. In the transport sector, IT is not just a question of computers for internal company operations. It is also a means of communication between a company and its vehicles and between a company and its customers. The winner of the Truck ICT 2007 prize is the company Transmet.

Vervoer Transmet sa

212, Leuvensesteenweg
3370 Boutersem

Tel: +32 16 72 11 20

Fax: +32 16 73 53 10

info@transmet-boutersem.be

www.transmet-boutersem.be



Green Truck 2007

The Green Truck Award rewards initiatives aimed at improving respect of the environment and better integrating environmental considerations into fleet management and a company's general operating philosophy. The Green Truck 2007 goes to **Van Dievel Transport**.

This medium-sized, family-run business was founded three generations ago. It has:

- participated in the economical driving test Ecodriving conducted by the Bond Beter Leefmilieu (Flemish environmental umbrella association) with the aim of reducing fuel consumption;
- purchased Euro 5 vehicles;

- initiated a comprehensive programme for greater respect of the environment.

Vervoer Van Dievel nv

Kalkoenstraat 40
2860 Sint-Katelijne-Waver

Tel: +32 15 30 80 00

Fax: +32 15 31 10 66

info@vandievel.eu

www.vandievel-transport.be



The logistics Project of the year will be described in the chapter on logistics.

3.2.1.7. EXHIBITIONS AND FAIRS

A. SITL - INTERNATIONAL TRANSPORT AND LOGISTICS EXHIBITION



25TH SITL (SEMAINE INTERNATIONALE DU TRANSPORT ET DE LA LOGISTIQUE)

Key figures:

- 800 exhibitors (30% from abroad)
- 25 000 trade visitors
- 15% visitors from abroad
- More than 40 conferences
- 6 innovation prizes

www.salon-sitl.com

Event Date:

11 - 14 March 2008

Place:

Paris Nord-Villepinte Hall 5

B. TRANSPORT & LOGISTICS

TRANSPORT & LOGISTICS

TRANSPORT & LOGISTICS - 7TH EDITION

Theme:

Event dedicated to Professionals in the Supply Chain Industry

Event Date:

End of September / beginning of October 2009

Place:

Brussels (Belgium - Europe)

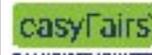
Venue:



Brussels Exhibition Centre

Place de Belgique
1020 Brussels
Belgium
Tel: +32 2 474 82 63
Fax: +32 2 474 83 97
info@bruexpo.be
www.brusselsexpo.be

Organizers:



easyFairs

Bld Louis Schmidtaan 97
1040 Brussels
Belgium
Tel: +32 2 740 10 70
Fax: +32 2 740 10 75
europe@easyfairs.com
www.easyfairs.com

More information about FASTLOG BELGIUM:

www.transport-logistics.be

C. TRAILER®

Trailer®

TRAILER®

Theme:

Event dedicated to Professionals in the Supply Chain Industry

Event Date:

End of September- beginning of October 2009

Place:

Brussels (Belgium - Europe)

Venue:

Kortrijk **Xpo**

Kortrijk Xpo Belgium

Doorniksesteenweg 216
8500 Kortrijk
Belgium
Tel: +32 5 624 11 11
Fax: +32 5 621 79 30
info@bruexpo.be
www.kortrijkxpo.be

Organizers:



SAV

Land van Rodelaan 20
9050 Gentbrugge (Ghent)
Belgium
Tel: +32 9 210 82 10
Fax: +32 9 232 22 79
info@sav.be
www.sav.be
www.trailer.be

SAV, the Royal Professional Organization of Flemish Road Hauliers and Logistics Service Providers, will be organizing the Trailer® trade fair for the 13th time. This bi-annual fair targets all decision-makers in the areas of transport, logistics and ancillary activities.

Trailer® offers users, producers and service providers a forum for better understanding current technological developments in the area of road transport and goods handling.

C. TRUCK & TRANSPORT



TRUCK & TRANSPORT 2007

Theme:

Bi-annual trade fair held at Heysel in Brussels coinciding with the Utility Vehicles, Recreational Vehicles and Motorcycles Show

Event Date:

13 - 16 January 2009

Place:

Brussels (Belgium - Europe)

Venue:



Brussels Exhibition Centre

Place de Belgique
1020 Brussels
Belgium
Tel: +32 2 474 82 63
Fax: +32 2 474 83 97
info@bruexpo.be
www.brusselsexpo.be

Organizers:

Truck & Transport
www.truck-transport.be

The Truck & Transport 2007 trade fair held from 13 - 16 January for the second time in succession at the Brussels Expo saw transport decision-makers meeting together alongside the 85th Utility Vehicles, Recreational Vehicles and Motorcycles show. Everybody was able to get updated on the state of the technology market, especially in the extremely important areas of telematics and energy savings.

E. SOLIDS PROCESSING & HANDLING



SOLIDS PROCESSING & HANDLING 2008

Theme:

Exhibition on the processing and transport of powders and solids

Event Date:

March 2008 (every year)

Place:

Antwerp (Belgium - Europe)

Venue:



Antwerp Expo

Bouwcentrum Antwerpen
Jan Van Rijswijcklaan 191
2020 Antwerp
Belgium
Tel: +32 3 237 28 90
Fax: +32 3 237 87 71
contactweb@antwerpexpo.be
www.mexicocentres.be

Organizers:



Thorex Europe

Kapellei 98
2980 Zoersel
Belgium
Tel: +32 3 385 05 24
Fax: +32 3 385 12 48
info@thorex.be
www.artexis.com

More detailed information on scheduled trade fairs and exhibitions both in Belgium and abroad can be found on the following two websites:

www.calendrierdesfoires.be/
www.eventseye.com/index.html

Website

Also take note of the website www.transport-vacature.be

This is the first website exclusively offering jobs in transport and logistics.

3.2.2. RAIL TRANSPORT

INTRODUCTION

With 3,544 km of railway track (2005 data), the Belgian rail network has one of the highest densities in the world. In addition to carrying some 187.5 million passengers, the railways were also responsible for moving 60.3 million tons of freight in 2006.

Several companies have started operating in the rail transport sector since the liberalization of the Belgian rail freight market.

To gain access to the Belgian rail network, a rail company must possess:

- a rail licence;
- a safety certificate;
- sufficient available infrastructure capacity.

Six companies already hold a safety certificate permitting them to run trains on the Belgian rail network. Their names are to be found on the website:

http://www.era.europa.eu/public/Safety/licences/licence_data_BE.aspx

	Name	Valid from	Valid until	Area
	SNCB - NMBS	27.02.2007	26.02.2010	Whole Network
	First issued	26.02.2004	26.02.2007	Whole Network
	D&L Cargo, BVBA (DLC)	01.01.2007	10.01.2009	Network where freight traffic is allowed
	First issued	10.01.2003	10.01.2006	Network where freight traffic is allowed
	SNCF	1.07.2005	7.04.2008	Whole Network
	Rail4Chem	18.09.2006	17.09.2009	see certificate
	First issued	05.01.2006	04.01.2009	5 sections, see certificate
	Transport AG	14.02.2007	10.12.2009	see certificate
	First issued	12.12.2006	12.12.2008	4 sections, see certificate
	ERS Railways	8.02.2007	8.02.2010	8 sections, see certificate

3.2.2.1. DLC

Dillen & Le Jeune Cargo nv

Airport Business Center Luchthavenlei 7a

2100 Deurne

Tel: +32 3 844 97 02

Fax: +32 3 844 97 03

info@dlcargo.com

www.dlcargo.com



DLC has an international licence in accordance with EC Directives.

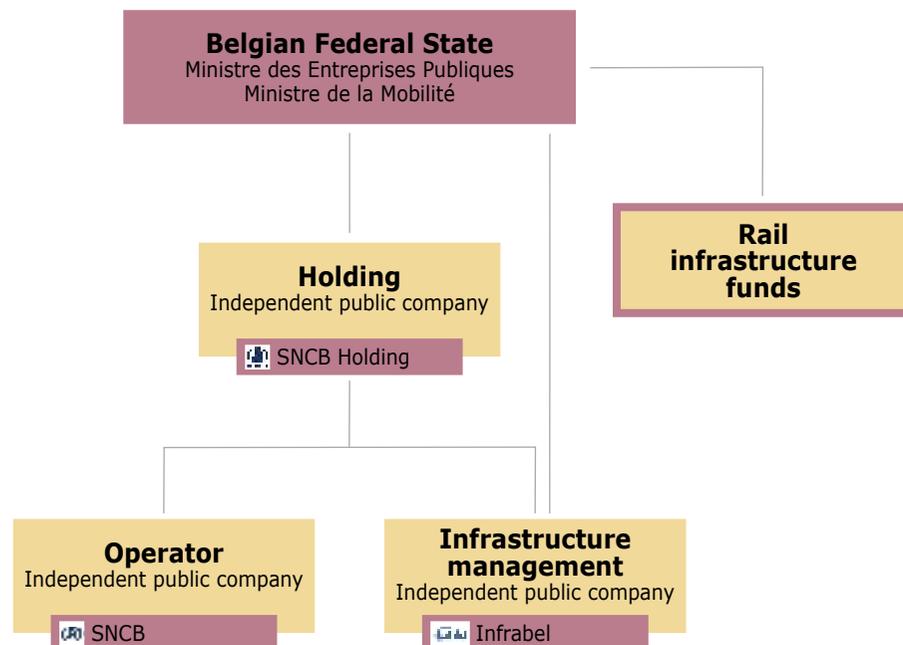
DLC has received safety certificates to operate in Belgium, the Netherlands and Germany. Currently, DLC operates high quality trains in Belgium, the Netherlands, Germany and together with partners in Switzerland and Italy. DLC provides international shuttles for their customers from point A to B. This results in better quality, immediate direct action in case of delay, fewer contact persons, higher average transfer speeds and flexibility in the event of changes in routes or demand. Since the liberalization of the Belgian rail freight market, DLC has already succeeded in capturing 4% of rail traffic.

3.2.2.2. STRUCTURE OF THE SNCB/NMBS GROUP

To conform to the new European regulations on rail liberalization, the SNCB/NMBS reviewed its structure, establishing a holding company called **SNCB-Holding** on January 1st, 2005 with two subsidiaries:

- Infrabel, which controls the whole infrastructure, i.e. everything relating to rail track and safety systems;
- SNCB/NMBS, which, as a rail service operator, retains its name. It is responsible for everything concerning rail passenger and freight services. As a 100% owned subsidiary of the SNCB-Holding, the SNCB/NMBS is the group's rail transport company, both for freight and passengers. Out of respect for its customers who are well acquainted with the name, the rail service operator retained the SNCB/NMBS name and its existing logo. From a legal point of view the SNCB/NMBS is an independent public law company ("société anonyme de droit public").

A. ORGANIGRAM OF THE SNCB/NMBS GROUP



B. THE SNCB/NMBS IN FIGURES

Selected figures on the SNCB/NMBS (Société Nationale des Chemins de fer Belges/Nationale Maatschappij der Belgische Spoorwegen):

- € 1.3 billion investment in 2006
- € 3.2 billion: SNCB/NMBS group turnover
- € 132 million operating profit
- 1,278 employees
- 3,500 km of rail track (2,998 km of which is electrified)
- 4,446 points on main lines and 8,378 points on branch lines
- 339 signal boxes and 1 Traffic Control centre
- 541 stations and halts (2006)
- more than 3,670 passenger train services (national + international) per day
- more than 160 high speed (TGV) services per day
- more than 700,000 passengers per day
- 950 freight trains per day
- 59.4 million tons of freight per year
- a fleet of 769 locomotives, 1,322 coaches and 13,685 wagons

C. 2006 RESULTS

Table 7: SNCB group – consolidated figures:

in € millions	2005	2006
Income	3, 010	3, 217
Ebitda	43	132
Ebit	-222	- 138
Profit before taxes	- 121	- 172
Net debt	2, 539	2, 774

In 2006 the SNCB/NMBS rail group (the SNCB/NMBS holding company, the SNCB/NMBS operating company, and infrastructure company Infrabel) successfully reported a consolidated turnover of € 2.75 billion, an increase of 6.2% over 2005. As already stated, the SNCB/NMBS operating company carried 187.5 million passengers within Belgium (against 177.6 million a year earlier), representing an increase of 5.6%. It closed 2006 with a positive operating cash flow of € 3.5 million (- 63.9 million in 2005).

Its net result amounted to a loss of € 67.7 million mainly due to the bad performance of B-Cargo (freight operations) with a 2006 loss of € 55.8 million.

Freight traffic saw proceeds rise by 6.9% to € 377.5 million. The rise in freight traffic and the growing success of this means of transport can be mainly attributed to the sharp rise in fuel prices.

D. PASSENGER TRAFFIC

Table 8: Passenger figures (in million) - 2005

National Traffic	173.0
International Traffic	13.7
Total	186.7

Source : SNCB

Number of passenger-km 7,771 (= a unit of measurement corresponding to the transport of one passenger or one ton of freight over one kilometre). The SNCB/NMBS as administrator of the Belgian railway network has no lack of projects aimed at increasing passenger numbers and offering them more and more service and comfort. Started back in 1993, work continues on a 314 km high-speed line construction program, including 200 km of new lines. These lines have made Belgium a strong link in the European high-speed network. The SNCB/NMBS is constructing and operating 4 high-speed lines departing from Brussels and connecting to France, United Kingdom, Germany (via Liège) and the Netherlands (via Antwerp).

In addition, the SNCB/NMBS is implementing its **RER project** (Regional Express Network surrounding Brussels). Its goal is to offer Brussels commuters a more efficient service, with more trains and seats. The creation of the Regional Express Network is aimed at providing an answer to the immense growth in travel demand in and around the capital. € 612 million are being invested in the RER project. With staged implementation the RER is expected to become fully operational in 2012.

Another new and significant development is the creation of the **Railteam** alliance by seven European rail companies (Eurostar, SNCF (France), SNCB/NMBS (Belgium), Deutsche Bahn (Germany), Ns Hispeed (the Netherlands), ÖBB (Austria) and CFF (Switzerland) together with their subsidiaries Thalys and Lyria. Railteam is the name of a completely new rail company aimed at competing with airlines on international travel within Europe. London to Frankfurt by train? According to the seven companies, this shall soon be as fast by train as by plane.

E. FREIGHT TRAFFIC

Table 9: Traffic development

B-Cargo	2006	2005	2004
Transported tonnage (in million)	60	60.9	60.3
Turnover (in million of €)	385.5	331	333.5

Source: B-Cargo



B-Cargo is the name of the SNCB/NMBS department engaged in marketing rail freight services. This market has been completely liberalized since the beginning of 2007. The SNCB/NMBS group is using B-Cargo as its intermediary in developing a comprehensive range of national and international freight services.

B-Cargo is:

- the longstanding Belgian rail operator; B-Cargo focuses on Belgium and its immediate neighbourhood (such as the ports of Dunkirk, Vlissingen and Rotterdam). B-Cargo offers service along the whole supply chain: wagon and traction management, sorting operations, specific logistic services, sales and marketing.
- a specialist in **logistic transport** in such specific areas as steel or intermodal transport. In certain cases, subsidiaries such as IFB (InterFerryBoats) or TRW (Transport Route wagon) are involved.
- an operator of major corridors transporting huge quantities of freight on international axes to and through Germany, Italy and France. By preference, this is done in partnership with other rail operators.

Though it is true that rail transport plays no major role in short-haul or low frequency transport, it must be stated that 50% of container traffic from the Port of Antwerp goes by rail to destinations within 50km of the port.

B-Cargo is concentrating on improving its services and better responding to its customers' needs. NARCON, the network of container shuttle trains, illustrates this. NARCON links Antwerp with terminals in Kortrijk, Mouscron, Charleroi, Athus, Genk and Zeebrugge, switching approx. 200,000 truckloads to the railways. One of NARCON's key success factors is its overnight handling, picking up trucks at point A in the evening and delivering them at point B by the next morning.

On an international scale, B-cargo and its subsidiaries can also offer very effective products.

Combined transport services to Duisburg were launched in 2006, servicing the Ruhr area market and beyond, including Eastern European countries. B-Cargo trains run non-stop to Duisburg without changing locomotives or drivers.



Other combined services are to:

- Neuss, near Düsseldorf, for the Cologne region;
- Strasbourg and South Germany and Austria;

Still in conjunction with other companies, connections are offered to:

- Switzerland, Macon, Vesoul, Lyon (with IFB);
- Italy and Spain (with TRW).

F. THE IRON RHINE

When speaking of railways, there is talk of reactivating the "Iron Rhine" railway line for transporting freight from Antwerp to the Ruhr area via Dutch Limburg. The total length of the line is 162 km, 96 of which are in Belgium, 48 in the Netherlands and 18 in Germany.

The connection was originally built in 1879 by way of a Treaty, but is now only partially used. If the project is implemented, traffic between the Port of Antwerp and Germany could reach 13 to 18 million tons per year by 2020.

Tractebel Engineering has conducted a feasibility study for the reactivation. The company has endeavoured to supply answers to the following points:

- Middle and long-term reduction in demand for rail transport (passengers and freight);
- Socio-economic assessment of the different alternatives;
- Assessment of the environmental impact;
- Optimization of project size;
- Financial feasibility for the 3 rail companies involved;

This study came to the conclusion that the gain in time would be 50% compared with the existing Antwerp-Ruhr connection.

A commission of independent experts set up in 2006 to investigate the reactivation of the Iron Rhine has just recommended calculating for 72 trains per day in both directions by 2030, a major increase compared with the 43 trains previously suggested.

Tractebel Engineering (Suez)

Avenue Ariane 2
1200 Brussels
Tel: +32 2 773 91 11
engineering@tractebel.com
www.tractebel.com



3.3. WATER TRANSPORT

This chapter is divided into two branches: sea transport and inland waterway transport.

3.3.1. SEA TRANSPORT

INTRODUCTION

Thanks to measures taken in 2003 by Belgium for making flagging onto the Belgian Maritime Register more attractive, the national commercial fleet has doubled in size. In the list of maritime nations, Belgium has moved up from 24th to 17th place in terms of transported tonnage, surpassing even France and the Netherlands.

Belgium now has more than 200 ships (merchant navy, dredgers and various sea-going tugs) flying the Belgian flag and the Maritime Academy is booked out.

The Belgian ship owners control a fleet whose tonnage exceeds that of the Netherlands, Spain and France. Belgian-operated ships are often high-tech automated wonders.

Since 2006, Belgium is to be found on the "white list" of European port authorities, a fact that undeniably gives an additional quality label to the Belgian fleet.

Ten academics have been officially assigned with conducting a comprehensive review of the Belgian Maritime Code which dates back to 1879. The experts must first produce a "green paper" which will be submitted to consultation via the website www.zeerecht.be. The aim is to adapt Belgian maritime law to current agreements and international practices in such areas as certain commercial techniques, types of contracts for insurance, transport or handling, containerised transport and electronic communications.

At the end of 2006, Belgian-flagged ships represented 1,398 permanent jobs, an increase of 5% over 2005.

The follow-on support operations make shipping a source of added value. 70% of the value added by a fleet does not emanate from the ship but from all its operational necessities such as land-based personnel, banking services, catering, etc.

3.3.1.1. THE IMPORTANCE OF SEA TRANSPORT IN FIGURES

Nearly 90% of world transport goes by sea. Statistics show that maritime navigation is the most environmentally friendly transport mode worldwide.

There are around 50,000 merchant ships trading internationally, transporting all kinds of cargo. The world fleet is registered in over 150 nations, and manned by over a million seafarers of virtually every nationality.

Sea transport remains one of the most effective and economical ways of transporting heavy goods over long distances, but **short sea shipping** has seen major growth over the past few years and now makes up 63% of the entire volume of goods transported by sea within the EU.

The EU, as part of its initiative to move more freight transport off the roads, is suggesting water based transport as a serious alternative. To this end, new Trans-European Network (TEN) projects based around shipping lanes, called "**Motorways of the Sea**" have been proposed. The aim is to encourage concentration of freight flows along four main shipping corridors based around the Baltic Sea, Western Europe, South Eastern Europe and South Western Europe, by standardizing regulations and providing services, infrastructure and intermodal linkages as necessary.

Table 10 : Maritime navigation in Belgium (2001-2004)

	2002	2003	2004	2005
Ships entering	31,508	29,909	29,854	30,785
Ships leaving	29,792	28,133	28,187	28,342
Cargo loaded x 1000 t	69,613	77,735	79,482	89,999
Cargo unloaded x 1000 t	104,837	104,152	109,159	116,667

Source: SPF Finance

3.3.1.2. EMPLOYERS' AND TRADE ORGANIZATIONS

A. AT EUROPEAN LEVEL

ECSA

European Community Shipowners' Association ECSA

Rue Ducale 67/B2

1000 Brussels

Tel: +32 2 511 39 40

Fax: +32 2 511 80 92

mail@ecsa.eu

www.ecsa.eu



ECSA, formed in 1965 under the name of the Comité des Associations d'Armateurs des Communautés Européennes (CAACE) and taking its present name in 1990, comprises the national shipowner associations of the EU and Norway.

Its aim is to promote the interests of European shipping so that the industry can best serve European and international trade and commerce in a competitive free enterprise environment to the benefit of shippers and consumers.

B. ON A BELGIAN LEVEL

B.1 URAB-KBR

URAB-KBR

Royal Belgian Shipowners' Association

Union royale des Armateurs belges

Koninklijke Belgische Redersvereniging

Brouwersvliet 33 bus 9

2000 Antwerp

Tel: +32 3 232 72 32

Fax: +32 3 231 39 97

info@brv.be

www.brv.be



The URAB/KBR was founded in 1909 and brings together all shipowners based in Belgium. It carries out surveys for all members and represents the sector's interests on a national, European and international level.

Members of the Royal Belgian Shipowners' Association:

Anglo-Eastern Antwerp Office

Sneeuwbeslaan 14
2610 Antwerp-Wilrijk
Tel: +32 3 270 01 80
Fax: +32 3 270 01 81
aesm.ant@angloeasterngroup.com
www.aesm.com.hk

A*D Rederij sa

Van Meterenkaai 1
2000 Antwerp
Tel: +32 3 202 02 02
Fax: +32 3 202 03 93
durot@durot.be
www.durot.be

Ahlers Belgium sa

Noorderlaan 139
2030 Antwerp
Tel: +32 3 543 72 11
Fax: +32 3 541 23 09
info@ahlers.com
www.ahlers.com

Bocimar nv

De Gerlachekaai 20
2000 Antwerp
Tel: +32 3 247 59 11
Fax: +32 3 247 59 92
cmb@cmb.be
www.cmb.be

Bofort

Matenstraat 214
2845 Niel
Tel: +32 3 546 72 00
Fax: +32 3 541 70 55
info@bofort.be
www.bofort.be

Continental Marine Services SPRL

Van Meterenkaai 1
2000 Antwerp
Tel: +32 3 231 95 26
Fax: +32 3 231 02 00
info@cmsfleet.be
www.cmsfleet.be

Croisimer- belle de l'Adriatique

Dobelenberg 8, Av. de la Métrologie
1130 Brussels
Tel: +32 81 23 46 31
Fax: +32 81 22 59 20
phaas@croisieurope.com

DAB VLOOT

sir Winston Churchillaan 2
8400 Ostend
Tel: +32 59 56 63 11
Fax: +32 59 56 63 15
vlood@lin.vlaanderen.be
www.welkombijvloot.be

Delphis sa

Verviersstraat 2
2000 Antwerp
Tel: +32 3 247 61 61
Fax: +32 3 247 61 66
info@delphis.be
www.delphis.be

Deme Building Materials sa

Haven 1025 Scheldtdijk 30
2070 Zwijndrecht
Tel: +32 3 250 52 11
Fax: +32 3 250 55 22
dredging@dredging.com
www.dredging.com

Jan de Nul nv

Tragel 60
9308 Aalst
Tel: +32 53 73 13 18
Fax: +32 53 78 17 60
info@jandenu.com
www.jandenu.com

Elveba Bunkering sa

Vosseschijnstraat kaai 140
2030 Antwerp
Tel: +32 3 641 63 17
Fax: +32 3 641 63 75
info@vanstappen.be
www.vanstappen.be

Euronav sa

De Gerlachekaai 20
2000 Antwerp
Tel: +32 3 247 44 11
Fax: +32 3 247 44 09
management@euronav.be
www.euronav.be

Exmar sa

De Gerlachekaai 20
2000 Antwerp
Tel: +32 3 247 56 11
Fax: +32 3 248 27 40
exmar.chatering@cmb.be
www.exmar.be

Fast Lines Belgium sa

Ernest Van Dijckkaai 15/17
2000 Antwerp
Tel: +32 3 213 52 70
Fax: +32 3 213 52 80
info@fastlines.be
www.fastshipping.co.uk

Kleimar sa

Suikerrui 5
2000 Antwerp
Tel: +32 3 213 52 70
Fax: +32 3 213 52 80
management@kleimar.be

Lowland International sa

St.Katelijnevest 61 bus 4
2000 Antwerp
Tel: +32 3 227 31 85
Fax: +32 3 227 31 85
info@lowland.com
www.lowland.com

Safmarine Container Lines nv

De Gerlachekaai 20
2000 Antwerp
Tel: +32 3 244 45 45
Fax: +32 3 244 47 12
pporter@be.safmarine.com
www.safmarine.be

Sobelmar Antwerp nv

Bredabaan 405
2930 Brasschaat
Tel: +32 3 650 15 00
Fax: +32 3 650 15 09
mail@sobelmar.com

Transpetrol maritime Services Ltd

Belgian branch
Terhulpesteenweg 178
1170 Brussels
Tel: +32 2 672 02 00
Fax: +32 2 675 52 57
maritime.be@transpetrol.com
www.transpetrol.com

B.2. BSSA

BSSA

Belgian Ship Suppliers Association
Oude Leeuwenrui 8 - B/8
2000 Antwerp
Tel: +32 3 231.08.80
Fax: +32 3 231.08.80
info@kbbs.info
www.kbbs.info



In the old days, the chandler used to bring salted meat, livestock (poultry, pigs, etc.), manila ropes, cargo blocks, sail and twine and related stuff, mainly for sailing vessels.

Nowadays a ship chandler has a much wider scope of supply. The ship stores supplied to a vessel are the main artery of the ship, they are vital to the operation and safety of every movement of seagoing vessels. Thousands of different items are supplied 24 hours a day, 365 days a year.

Members:

Delta Co nv

Westpoort 51 - 59
2070 Zwijndrecht
Tel: +32 3 542 01 90
Fax: +32 3 541 83 22
info@deltaco.be

General Stores nv

de Smet de Nayerlaan 36
8400 Ostend
Tel: 32 59 70 25 03
Fax: 32 59 80 88 10
info@generalstores.be
www.generalstores.be

K. Gjertsen & Co nv

Heizegemweg 11
2030 Antwerp 3
Tel: +32 3 541 72 40
Fax: +32 3 541 71 72
info@gjertsen.be

Kubo Supply & Trading nv

Industrieweg 11 - Haven 403
2030 Antwerp 3
Tel: +32 3 540 12 24
Fax: +32 3 540 12 25
kubo@klevenberg.com

Proios Maritime nv

Westpoort 51-57
2070 Zwijndrecht
Tel: +32 3 231 48 45
Fax: +32 3 233 38 68
info@proios.be
www.proios.be

Van Hulle Shippers nv

Bredastraat 139
2060 Antwerp 6
Tel: +32 3 231 89 50
Fax: +32 3 233 00 40
info@vanhulleshops.be
www.vanhulleshops.be

Vets Shipstores nv

Wilmarsdonksteenweg 11
Haven 259
2030 Antwerp 3
Tel: +32 3 541 02 84
Fax: +32 3 541 99 36
sales@vets.be
www.vetssupplies.com

3.3.1.3. BELGIAN PORTS

Belgium possesses the highest concentration of ports in Europe. Of all Belgian ports, 4 if not 5 are seaports. More specifically we are talking about Antwerp, Ghent, Ostend and Zeebrugge. Brussels also qualifies as a seaport but has not been listed, in contrast to Liège's port complex, in the update of the National Bank's annual survey on the "economic importance of Belgian ports - 2005 report", May 2007, No. 115.

This working paper states the following:

"Regarding the development of sea freight traffic, 2005 was in line with 2004 in most Flemish ports, although there was a significant drop in traffic at Liège's port complex. The growth in containerised transport, together with an unprecedented development in global trade, has remained the main factor in the expansion of sea traffic in North Belgium. It has however not yet had any significant effect in Wallonia, which has moreover been hit by the progressive shutdown of Arcelor's hot metal production.

In 2005, direct added value at constant prices has risen by 10.4%, 1.7%, 11.1% and 1.1% respectively at the ports of Antwerp, Ghent, Ostend and Liège. A drop of 2.7% was recorded in Zeebrugge, attributable to non-maritime operations.

In 2005 these five ports accounted for 5.2% of Belgium's GNP, rising to 9.8% if one takes indirect effects into consideration.

Employment in the five ports once again remained stable in 2005. In Antwerp, Ghent and Ostend it rose by less than 1%, while in Zeebrugge and Liège it receded by a little over 2%."

Although all Belgian ports offer a plethora of different services, each is constantly on the lookout for unique offerings. Antwerp is Belgium's leading port for sea-going traffic and occupies the 4th position worldwide. Ghent has developed close links with Le Havre. Ostend and Zeebrugge are leaders in short sea shipping, especially with the United Kingdom. This complementarity is to be seen as an additional asset.

FLANDERS PORT AREA

Preferring not to compete against each other but rather to complement each other in offering a more diversified range of services, the Flemish ports **Zeebrugge, Ostend, Ghent** and **Antwerp** are engaged in developing tighter collaboration to become one of the major European shipping corridors. One objective in the setting up of the "**Flanders Port Area**" action plan with its

concrete projects is to strengthen Flanders' position as a premium logistic region.

This collaboration benefits from financial support from the Flemish Regional Government and aims at strengthening the economic weight of Flemish ports, especially abroad. The focus is on export and advertising policy, research, innovation and communication. Project examples are the creation of a "know-how" platform on logistics and port technology, and the implementation of a joint training platform in the ports.

For more information:

Vlaamse Havenvereniging vzw

Brouwersvliet 33/8
2000 Antwerp
Tel.: +32 3 609 34 .00
Fax: +32 3 609 34 11
info@vlaamsehavenvereniging.be
www.vlaamsehavenvereniging.be



The Vlaamse Havenvereniging represents the private port authorities of Ostend, Zeebrugge, Ghent and Antwerp. Its founding members are:

- Oostendse Havengemeenschap (OHG)
- Vereniging van Gentse Havengebonden Ondernemingen (VeGHO)
- Association Port of Zeebrugge Interests (Apzi)
- Alfaport Antwerp

These 4 associations bring together 700 companies with a total annual average added value of € 6.4 billion.

Summary table:

Flanders

Havenbedrijf Antwerpen
Maatschappij van de Brugse Zeevaartinrichtingen - M.B.Z.
Havenbedrijf Gent (GAB)
Stedelijk Havenbestuur Oostende
Haven Genk

Brussels-Capital

Port de Bruxelles

Wallonia

Port autonome de Liège (P.A.L.)
Port autonome de Namur (P.A.N.)
Port autonome de Charleroi (P.A.C.)
Port autonome du Centre et de l'Ouest (P.A.C.O.)

A. ANTWERP

Antwerp Port Authority

Havenhuis-Entrepotkaai 1
2000 Antwerp
Tel: +32 3 205 20 11
Fax: +32 3 205 20 28
info@haven.antwerpen.be
www.portofantwerp.com



The port is administered by an autonomous municipal body with a separate corporate identity, called Antwerp Port Authority.

It owns the docks and the sites used by port operators and industries on the Right Bank, and also some of the port's equipment. Moreover, the Antwerp Port Authority is responsible for the management of the port on the Left Bank, thus ensuring the application of uniform policies on both sides of the river.

The Antwerp Port Authority has a workforce of 1,800. It owns and manages docks, berths, locks and bridges. It is responsible for planning, modernizing and maintaining the infrastructure of the port, and for operating its own equipment, including float cranes, tugs and dredgers. The Antwerp Port Authority leases sites and land, and distributes electricity in the port.

In addition to these activities, the Antwerp Port Authority publishes a quarterly journal called Antwerp Port News with articles on the current port events, balance sheet analyses or the latest news on containers.

Alfaport Antwerp

The Federation of Port Companies and Logistic Service Providers
Brouwersvliet 33, bus 8
2000 Antwerp
Tel: + 32 3 205 18 80
Fax: + 32 3 231 27 52
info@alfaportantwerpen.be
www.alfaportantwerpen.be



Alfaport Antwerp is a lobby and regulatory body representing port companies and logistics service providers in the port of Antwerp.

Alfaport Antwerp's mission is to create an enterprise-friendly climate by making an active contribution to socio-economic issues such as security, electronic data interchange, training, environmental regulations and multi-modalism.



The Alfaport Antwerp federation represents 5 trade federations, which in turn represent over 400 members/companies directly employing more than 22,000 workers and generating a significant amount of indirect employment.

The 400 companies mentioned above are affiliated to one of Alfaport Antwerp's 5 founding members, i.e.:

- The Antwerp Shipping Federation - de Antwerpse Scheepvaartvereniging (ASV) -, info@asv.be, www.asv.be
- The Royal Belgian Shipowners Association - de Koninklijke Belgische Redersvereniging (KBRV)- www.br.v.be,
- de Algemene Beroepsvereniging voor het Antwerpse Stouwerij- en Havenbedrijf (ABAS) - info@abas-kvbg.be,
- de Vereniging voor Expeditie, Logistiek en Goederenbelangen van Antwerpen (VEA) - Union des expéditeurs, logistique et agents d'usines d'Anvers (GAMU) - vea@vea-ceb.be - www.expan-vea.be
- het Koninklijk Verbond der Beheerders van Goederenstromen (KVBG).

The following 4 organizations are associated with **Alfaport**:

- FEBETRA
- Flanders Maritime Equipment Association (FLAMEA)
- Koninklijke Belgische Beroepsvereniging der Scheepsbevoorraders (KBBS)
- SAV

Alfaport maintains tight contacts with a number of organizations as well as with several public sector bodies with the aim of creating a positive climate and optimal conditions for the port's operations in general and for private sector operations in particular.

PUBLICATION

"**Portaal**" is a quarterly magazine published in collaboration between Alfaport Antwerp, the CEPA social secretariat and the Lloyd (responsible for publication). The magazine can be obtained at either Alfaport or CEPA.

FURTHER ANTWERP BODY OPERATING IN THE PORT

APEC-Antwerp

Antwerp/Flanders Port Training Center
 Italiëlei 2,
 2000 Antwerp
 Tel: +32 3 205 23 22
 Fax: +32 3 205 23 27
apec@haven.antwerpen.be
www.portofantwerp.be/apec



APEC (affiliated to the Antwerp Port Authority) has been offering training courses in all areas of port operations since 1978. Its basic courses, custom-built training programs and study trips have drawn more than 9,000 people from 140 countries to Antwerp, making APEC more than just a port training centre. It is a window onto the maritime world and an instrument permitting direct contacts between professionals worldwide.

IMPORTANCE OF THE PORT OF ANTWERP IN FIGURES

For sea traffic Antwerp is the **second largest European port and the fourth worldwide**. In 2006, the port handled 167.4 million tons of freight and this figure is growing each year. Thanks to this performance Antwerp has established itself as one of the European leaders in transport and logistics.

According to a survey conducted by the Policy Research Corporation, the Port of Antwerp directly generates 62,659 jobs with an additional 85,299 indirectly, amounting to a total of almost 148,000. The survey also shows that the public authorities earn an estimated € 418 million a year from port activities.

The National Bank of Belgium has recently carried out a disaggregate analysis of the economic impact of the port sector, attempting to identify, quantify and locate the mutual relationships between the various port players themselves and between them and the rest of the Belgian economy. The information is compiled in the NBB Working Paper 110, 2007-02-08, Economic impact of port activity: a disaggregate analysis – The case of Antwerp - F. Coppens F. Lagneaux H. Meersman N. Sellekaerts E. Van de Voorde G. van Gastel Th. Vanelslander A. Verhetsel and is available on www.nbb.be, economic and financial publications, working paper 110.



In 2006 15,770 ships docked in the port, representing 265,164,742 total gross tonnage. The modal shares of the freight leaving the port are as follows:

- transshipment: 17.1%;
- inland waterways: 28.4%;
- rail: 9.1%;
- road: 45.3%.

To manage this volume of freight, the Port of Antwerp has at its disposal an internal network of 270 km of roads, 1,000 km of rail track and 300 km of pipelines. It is directly connected to the main European motorways and northern European inland waterways. In addition, the Port of Antwerp is only 45 minutes from Brussels Airport's freight handling facilities.

Antwerp in brief:

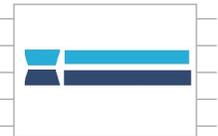
- is, of all North Sea ports, the most centrally positioned with regard to the largest European production and consumption centres;
- is a congestion-free main port and has excellent hinterland connections thanks to a dense system of motorways, railways, inland waterways;
- Environmentally friendly modal split:
 - 85.7 million tons by barge;
 - 24.8 million tons by rail.
- has world-wide maritime connections: more than 300 regular services, guaranteeing more than 14,000 crossings per annum to more than 800 destinations;
- is famous for its high productivity cargo handling and for the quality of its service provision;
- is the largest conventional cargo port in Europe ;
- the principal pipeline hub with the largest petrochemical complex in Europe;
- has a container-handling capacity of more than 7 million TEU a year, which will be doubled once the Deurganckdok starts operations.
- has the largest warehousing capacity in Europe (more than 5.2 million m² of specialized warehouses).

Of all European ports, Antwerp has the largest warehousing capacity, ranging from multi-purpose to specialized buildings, 1,372,000 m² of which are cold storage. In addition port operators have specialized terminals for unloading cars, grain, china clay, coal and ore, coffee, containers, fertilizers, wood, dangerous goods, steel, perishable foodstuffs, plastics, sugar. Tank storage is offered as well.

B. GHENT

Ghent Port Company

Havenbedrijf Gent GAB
 J. Kennedylaan 32, Haven 3000 A
 9042 Ghent
 Tel: +32 9 251 05 50
 Fax: +32 9 251 54 06
 info@havengent.be
www.portofghent.be



The Port Company's task consists in acting as the port administrative authority as stipulated in the Port decree. The ultimate goal is the effective management of the port. This largely boils down to the Port Company ensuring that the necessary and appropriate infrastructure is present to enable smooth handling of ship and goods traffic and that a favourable social and economic climate is created for companies operating in the port or wishing to establish themselves there.

VeGHO

Skaldenstraat 56
 9042 Ghent
 Tel: +32 9 259 28 07
 Fax : +32 9 259 28 32
 vegho@portofgent.be
www.portofgent.be



The **Association of Ghent Port Related Companies** (VeGHO) unites about 90% of the companies located in and near the port of Ghent. Given the (industrial) character of the port of Ghent, VeGHO consists mainly of B2B-companies. Numerous members are "large" companies - also and principally in terms of employment - organized as multinationals and present on the international scene.

As an employers' association, VeGHO represents the industry of Ghent in the Federal Committee for Seaport Policy, the Flemish Ports Committee, the Flemish Port Association, and a large number of provincial and local committees and working groups.



The port of Ghent:

- is a modern, multi-purpose, non-tidal seaport, managed by Ghent Port Company AMC, an autonomous municipal company;
- occupies an area with a total surface of some 3,291 ha, divided into 511 ha of water surface (canal and docks) and 2,780 ha of land, employing a total of some 28,000 people;
- counts 27.4 km quay walls/5 RoRo berths;
- is a confirmed steel port (Arcelor Mittal, Duferco,...) and a leading dry- and liquid bulk port;
- handles around 45 million tonnes of water-borne cargo a year, of which two thirds are transported overseas and one third via inland waterways. There are easy on-carriage connections by sea, inland waterway, rail and motorway as well as by pipeline;
- lies close to the crossing of Europe's three most important motorways: the E17 (Scandinavia-Portugal), the E34 (French Channel ports – Ruhr area) and the E40 (UK-Turkey);
- the safe nautical approach from the North Sea via the tide and current-free Ghent-Terneuzen canal guarantees easy access to and from the port for sea-going vessels of up to 80,000 tons carrying capacity and a maximum draught of 12.50 m;
- has specialized terminals for the storage and distribution of grain, coal, ores, petroleum products, fertilizers, fruit juices, cars, vegetable oils, forest products, etc.
- has developed into a major distribution platform for various sorts of goods;
- belongs to one of the leading industrial zones in Western Europe.

The new Kluizendok is nearing completion. This project will release 200 ha of ideally situated land, with waterway connections on the left bank of the sea canal. The first companies set up there in the course of 2005.

In **2006** the port of Ghent performed an important catching-up manoeuvre, turning last year's downward trend into a significant growth. Waterfront transshipment increased by 9.7%, or 3.7 million tons, totalling 42.5 million tons, of which 24.2 million tons for the account of seagoing navigation, and 18.4 million tons for inland navigation.

The growth was almost evenly distributed between seagoing navigation (+8.7%) and inland navigation (+11.0%) which demonstrates, yet again, the strategic nature of the port of Ghent as transshipment centre.

The port of Ghent is also a unique short sea shipping port.

C. ZEEBRUGGE

Zeebrugge Port Authority

MBZ P.Vandammehuis
Isabellalaan 1
8380 Zeebrugge
Tel: +32 50 54 32 11
Fax: +32 50 54 32 24
mbz@zeebruggeport.be
www.portofzeebrugge.be



In contrast to Antwerp and Ghent, Zeebrugge is a seaport on the North Sea coast. It specializes in ro-ro transport, containers and energy products (liquid gas), as well as being Belgium's premier passenger port and a fishing harbour, similar to Ostend and Nieuwpoort.

PORT AUTHORITY

Since 1894 the Port Authority Bruges-Zeebrugge, the MBZ (Maatschappij van de Brugse Zeevaartinrichtingen N.V.) has been responsible for the exploitation and development of the port of Zeebrugge. Today, the port has grown into a vital junction in a European context. Moreover, work on the port is never finished and changes quickly according to economic, ecological and social circumstances.

ASSOCIATION

APZI vzw

Association Port of Zeebrugge Interests vzw
Doverlaan 7 bus 10
8380 Zeebrugge
Tel: + 32 50 55 27 57
Fax: +32 50 55 14 18
info@apzi.be
www.apzi.be

APZI (Association Port of Zeebrugge Interests) is a private sector association in the Port of Zeebrugge. This association was founded in 1973 and has the legal form of a non-profit organization (vzw). In the port community, APZI fulfils a double task: the representation of the Zeebrugge private sector and the promotion of the port.

Some 130 companies in the Port of Zeebrugge are affiliated to APZI: stevedores, shipping companies and shipping agents, forwarding agents, transport companies (road, rail and inland navigation) and companies engaged in port



activities (trade, industry and services). APZI acts as the representative and mouthpiece of the Port of Zeebrugge private sector.

Zeebrugge celebrated its centenary in 2007 by commissioning the new Albert II docking basin. As a multi-use port Zeebrugge is specialized in a wide range of different goods.

In 2006 Zeebrugge handled a total freight volume of 39.5 million tons, an increase of 13.6% over 2005 and the highest growth rate of all ports between Le Havre and Hamburg.

In the first 6 months of 2007, container traffic grew a further 6% till 20.67 million tons. Container transshipment increased by 18%. Bulk goods went up by 6%, ro-ro traffic by 3.8%.

The Hamburg – Le Havre Range

The Hamburg – Le Havre Range consists of the ports of Antwerp, Ghent, Zeebrugge, Rotterdam, Amsterdam, Bremen, Hamburg, Dunkirk and Le Havre. The Vlaamse Havencommissie also includes Ostend in the range. In 2006, these ports transhipped a total of 1,007.2 million tons, an increase of 5.2% compared to 2005.

From 2005 to 2006, the Flemish ports share rose from 23.5% to 23.6%, subdivided as follows :

- Antwerp: 16.6%
- Ghent: 2.4%
- Zeebrugge: 3.9%
- Ostend: 0.8%

With an annual total of 1.9 million (+ 11.3%) transhipped cars, Zeebrugge is the biggest car-handling port worldwide. Nearly all manufacturers are present, either directly or indirectly. General Motors, Ford, Daimler Chrysler are major customers, but the most important remains Toyota, accounting for some 400,000 vehicles. To cope with this volume, Zeebrugge has no less than 300 hectares of open air parking space available, as well as a number of recently built indoor parking lots.

In addition to the high volume of unit loads (trailers, containers, new cars), Zeebrugge also has specialized facilities and know-how for handling conventional general cargo, indivisible loads, dry bulk goods and liquids.

In short, the port of Bruges-Zeebrugge plays an important role in several fields, the most important of which are:

- intense Ro-Ro traffic between the continent, Great Britain, Scandinavia and Southern Europe;
- European hub port for the automotive industry;
- container port with an excellent nautical accessibility for + 4,000 TEU ships;
- import of Liquefied Natural Gas and energy products;
- handling, storage and distribution of perishables and other agricultural products;
- handling of conventional general cargo and 'high & heavy' cargoes;
- passenger transport;
- organization of the European distribution via an intricate network of hinterland connections.

Tyre manufacturer Bridgestone Logistics opened the third stage of its Zeebrugge Logistics Centre in 2007. The complex currently covers an area of 87,500 m², enabling the storage of 1.3 million tyres.

The transport company 2XL has also just opened its brand new Zeebrugge warehouse, from which the British market for Danone mineral water will be supplied.



The "Elly Maersk" recently docked at Zeebrugge. It is the largest container ship worldwide, 397 meters long and 56 meters wide – the size of four football pitches. It can carry up to 13,400 20ft containers.

D. OSTEND

Autonoom Gemeentebedrijf Haven Oostende (AGHO)

Slijkensesteenweg 2,
8400 Ostend

Tel: +32 59 34 07 11

Fax: +32 59 34 0710

www.portofoostende.be



Port customers are represented by the
Oostendse Havengemeenschap vzw, p/a dienstencentrum,

Zandvoordeschorredijkstraat 289,

8400 Ostend

Tel: +32 59 51 65 89

Fax: +32 59 70 52 18

oostende@kamerwvl.be

Ostend in brief:

- Total area of the port zone: 658 ha (199 ha. of which consist of water)
- Total berthing length: 8,100 m
- Channel depth: 8 m
- Docks: 6
- 14 cranes – capable of lifting up to 16 tons
- Locks: Demey : L x B x D =123 m x 17.4 m x 4.5 m
- Close to E-40/A10 motorway with direct access to the port, airport and town centre.

Table 10: Traffic development in the Port of Ostend

	2006	2005	2004	%2005/2006
Passengers	231,364	214,794	163,436	8%
Ro-Ro freight (units)	297,133	301,509	300,993	-1%
Accompanied	140,518	158,970	136,993	-12%
Unaccompanied	156,615	142,539	164,060	10%
Containers (TEU)	4,555	8,890	15,418	- 49%
General Cargo (ton)	7,812,375	7,681,138	7,544,826	2%
Vessels	4,657	4,843	4,883	- 4%
Inland Navigation	289,390	163,302	191,960	77%

E. GENK

Haven Genk nv

Kolenhavenstraat 6

3600 Genk

Tel: +32 89 30 06 60

Fax: +32 89 30 06 70

info@havengenk.be

www.havengenk.be



Being an inland port and container terminal, Haven Genk offers a complete range of services as can be expected from a port operator; i.e. a tri-modal platform (water, rail, road) able to handle and transport containers, conventional cargo and bulk.

- Barge Terminal: transport by barge between Haven Genk and the seaports of Antwerp, Rotterdam and Zeebrugge.
- Rail terminal: Haven Genk is also equipped with its own rail terminal directly connected to the Belgian railway network.
- Conventional Cargo & Break Bulk: both big industry and SMEs call upon the storage and transshipment services of Haven Genk to handle all their customs formalities, storage in customs warehouses, and other various port activities for a very wide range of goods, from general to bulk cargo.

F. BRUSSELS - PORT OF BRUSSELS

Port de Bruxelles

Place des Armateurs 6

1000 Brussels

Tel : +32 24 206 700

Fax: +32 24 206 974

portofbrussels@port.irisnet.be

www.portofbrussels.irisnet.be



The Port of Brussels authority is responsible for the management, operation and development of the port, the outer harbour, port facilities and their outposts in the Brussels-Capital Region.

Port of Brussels in figures:

- 80 hectare basin;
- 12 km of quays (2.8 km of which are maritime) ;
- 90 hectares of usable surface area;
- 120 km from the sea;
- 5 hours by ship from Antwerp;
- Open 365 days a year, day and night, for sea-going vessels and barges up to 4,500 tons.



The port:

- generates 11,250 jobs directly and 15,700 indirectly;
- operates 31 docks alongside the Meuse and the Albert Canal;
- owns 26 km of berths,
 - over 366 hectares of docklands,
 - a one-hectare covered docking basin,
 - a Ro-Ro berth,
 - 200,000 m³ storage tanks for petroleum products,
 - 65 warehouses covering 15 hectares,
 - 50,000 m³ of grain silos,
 - a yacht harbour with moorings for 130 pleasure boats.

The port is accessible to:

- sea-going/river vessels up to 2,500 tons,
- two-barge trains up to 4,500 tons.

The Port of Liège also benefits from regular Short Sea Shipping services, especially to the United Kingdom.

With the resumption of production at Arcelor, the port's river traffic has grown by 8% to somewhat more than 7.7 million tons in the first half of 2007.

The Autonomous Port of Liège has **3 tri-modal locations** (even quadrimodal if the proximity of Bierset Airport is taken into account).

As an answer to the shortage of port space, the PAL has been given a 100 hectare zone alongside the Albert Canal which will be developed as a logistic village called **Trilogiport**, completely focused on multi-modality. Works are expected to start in 2008, with the platform being operational in 2010.

With its strategic position the main aim of the tri-modal platform is to:

- relieve major ports such as Antwerp and Rotterdam of some of their container traffic;
- attract companies using waterways and major European distribution centres with high value-adding operations, which can generate new and long-term jobs.

On its 15 hectare site, the container terminal has a designated annual capacity of 200,000 units.

PAL AND ANTWERP

The steady rise in containerised traffic has led to unprecedented congestion in

the major seaports. To ease this bottleneck, the major ports are turning to the inland ports in their natural hinterland. For the Port of Antwerp, Liège plays a predominant role especially in providing space capable of accommodating major European distribution centres. It should be remembered here that PAL is only 15 ship hours away from Antwerp. Liège is part of Antwerp's natural hinterland.

To enable this cooperation with the Port of Antwerp, PAL has developed the multi-modal platform referred to above. Its aim is to create a true "logistic village" in the heart of Europe. The project will strengthen PAL's position as a premium economic operator in the industrial redevelopment of the Liège basin. Thanks to this initiative supported by all of Liège's stakeholders, PAL will be in a position to accommodate a number of other businesses and increase river traffic, while at the same time it will guarantee the sustainable economic development of the Liège region.

H. PAC

Autonomous Port of Charleroi

Rue de Marcinelle 31
 6000 Charleroi
 Tel: +32 71 31 96 33
 Fax: +32 71 32 44 57
 info@charleroi.portautonome.be
www.charleroi.portautonome.be



Founded in 1971, PAC is an association of the following public agencies: the Walloon Region, the Province of Hainaut, the City of Charleroi and the local government association IGRETEC.

PAC is responsible for a number of sites and fully equipped port zones stretching 30 km along the Charleroi-Brussels Canal and the River Sambre.

Several zones are equipped with specialist facilities. Dria is one example with its completely new docking basin. Another is the Charleroi Logistic Centre, a vast area of some 60 hectares that includes the massive multi-modal platform. The centre's development continues, managed by SA Charleroi Dry Port.

The main port zone is La Praye on the River Sambre, the growth of which is directly related to the new Carinox stainless steelworks. An appreciable growth has also been noticed at Pont-de-Loup and Farciennes, where traffic has practically doubled.

Most traffic consists of products for the metals industry.



2006 was the first year in which the PAC reached 7 million tons of freight handled in its riverside tri-modal facilities, named first Charleroi Dry Port, but renamed shortly afterwards **Charleroi Logistics Center**.

I. PAN

Autonomous Port of Namur

Place Leopold 3
5000 Namur
Tel: +32 81 24 09 50
Fax: +32 81 24 09 55
fgoffaux@portnamur.be
www.portnamur.be



The Port of Namur shifted 4.1 million tons of freight in 2006, the equivalent of 130,000 truckloads.

PAN in brief:

- 15 industrial zones, 9 ports and 6 marinas stretched along the Meuse and the Sambre in the Province of Namur;
- 161 hectares of industrial sites available to users;
- almost 8,000 meters of berths available to waterway users;
- a very attractive mix of long-term concessions and support for investors.

J. PACO

Autonomous Port of the Centre and the West

Château Gilson
rue de Bouvy 11
7100 La Louvière
Tel: +32 64 23 67 00
Fax: +32 64 22 84 98
paco.scri@skynet.be
www.le-paco.com



Founded in 1999, PACO brings the Walloon Region and the public and private sectors together for the first time in a single decision-making body which is involved in a number of different projects. Furthermore, it is responsible for industrial and commercial zones in the province of Hainaut territory, except for those falling under the responsibility of the Autonomous Port of Charleroi.

The port zones under PACO's responsibility account for a total of more than 5.5. million tons of waterway traffic.

3.3.2. INLAND WATERWAY TRANSPORT

INTRODUCTION

In contrast to road and rail transport with their congestion problems, inland waterway transport still has major growth potential. Furthermore, freight movement by internal waterway is being actively encouraged as an alternative to road transport.

Transport by inland waterways continues to increase year on year as a reliable and cost-effective means of moving bulk goods within Northern Europe. In 2006 waterway traffic in Belgium reached 4.68 billion ton/kilometres, a rise of 4.07% over 2003 and more than 61% over 1995.

Belgium ranks third in Europe in terms of inland waterway traffic volume and second in the share of inland waterways in total freight transport.

In 2005 the Belgian fleet consisted of 1,265 units representing a total of 1,450,000 tons. Whilst ship numbers are declining, average tonnage is nevertheless increasing proportionally.

42.3% of businesses using this form of transport are producers of minerals and building materials. The rest is divided between metallurgic, petroleum, agricultural and chemical products, solid fuels, ore, fertilizers and foodstuffs.

3.3.2.1. THE BELGIAN INLAND WATERWAY NETWORK

Belgium's inland waterway network is one of the densest in the world and accounts for 1,514 kilometres of rivers and canals, with 450 km located in Wallonia and more than 1,000 in Flanders. All major economic and industrial centres in Belgium are linked to each other by modern inland waterways: most of the waterways in Belgium have been adapted to the European standard of 1,350 tons or more.

The Belgian inland waterway network also perfectly fits into the European Union network.

Belgium's inland waterway network can be described as follows:



Three main arteries link the southern and eastern industrial regions with the northern ports:

- The Antwerp-Liège artery, via the Albert Canal;
- The Antwerp-Brussels-Charleroi artery, via the navigable Scheldt, the Sea Canal and the Bruxelles-Charleroi Canal;
- The Antwerp-Ghent-Borinage artery, via the Scheldt and the Nimy-Blaton-Péronnes Canal.

Two East-West arteries crossing the country:

- The first, northerly artery connects the coastal ports with the seaports of Ghent and Antwerp, ending in the Port of Liège.
- The second artery facilitates shipping between Dunkirk and Liège via Mons, Charleroi and Namur. On Belgian territory the route includes the Nimy-Blaton-Péronnes Canal, the Canal du Centre, the Charleroi-Brussels Canal, the Lower Sambre and the Meuse.

The double hydraulic ship lift at Strépy-Thieu was opened in 2002, together with the associated Sart canal bridge and Blanc-Pain safety protection gate. As a result, the entire Canal du Centre is now navigable for standard 1,350 ton Euro-barges, with all what this involves in new navigable connections, the development of Wallonia's inland waterways and its autonomous ports. Strépy meets the expectations, with traffic easily surpassing 2 million tons.

3.3.2.2. INLAND WATERWAY ADMINISTRATION

The inland waterways are administered in the north by the Flemish Regional Government and in the south by the Walloon Regional Government. The Brussels-Capital Regional Government administers 14 km, from the Anderlecht lock on the Charleroi-Brussels Canal to the Vilvoorde bridge on the Brussels-Scheldt Canal.

The regional governments are responsible for administering the inland waterways: sailing hours, timetables for waterway edifices (locks, lifts, etc), high-speed stretches for practicing high-speed navigation, issuing licences for vehicle traffic on towpaths, designating authorized mooring areas, waterway information, nautical events, maintenance and repair of waterway edifices, waterway closing times etc.

The regional authorities responsible for the inland waterways are listed below:

Walloon Region

Walloon Ministry of Amenities and Transport

DG Waterways
 Direction de la Coordination D 215
 Boulevard du Nord 8,
 5000 Namur
 Tel: +32 81 77 30 29
 Fax: +32 81 77 37 99
 d215@met.wallonie.be
www.voies-hydrauliques.wallonie.be

Office for the Promotion of Navigable Waterways - OPVN,

rue Forgeur 2
 4000 Liège
 Tel: +32 4 220 87 50
 Fax: +32 4 220 87 60
 opvn@met.wallonie.be
www.opvn.be

This body is responsible for promoting waterway freight transport.

Brussels-Capital Region

Port de Bruxelles

Place des Armateurs 6
 1000 Brussels
 Tel: +32 2 420 67 00
 Fax: +32 2 420 69 74
 portdebruxelles@port.irisnet.be
www.portdebruxelles.irisnet.be

Flemish Region

De Scheepvaart nv

Havenstraat 44
 3500 Hasselt
 Tel: +32 11 29 84 00
 Fax: +32 11 22 12 77
 info@descheepvaart.be
www.descheepvaart.be



Waterwegen en Zeekanaal nv

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 Fax: +32 3 860 63 00
 info@wenz.be
www.wenz.be





- Afdeling ZeeSchelde, Copernicuslaan 1, bus 13, 2018 Antwerp
Tel: +32 3 224 67 11 - Fax: +32 3 224 67 05
- Afdeling BovenSchelde, Nederkouter 28, 9000 Gent
Tel: +32 9 268 02 11 - Fax: +32 9 268 02 72
- Afdeling Zeekanaal, Oostdijk 110-112, 2830 Willebroek
Tel: +32 3 860 62 11 - Fax: +32 3 860 63 00

Promotie Binnenvaart Vlaanderen vzw

Armand Hertzstraat 23
3500 Hasselt
Tel: +32 11 23 06 06
Fax: +32 11 23 06 09
pbv@binnenvaart.be
www.binnenvaart.be



Straatsburgdok- Noordkaai 1 A
2030 Antwerp
Tel: +32 3 20 20 521
Fax: +32 3 2020 524
www.shortsea.be

3.3.2.3. FLEET

On 31 December 2006, the fleet operated by Belgian inland waterway companies comprised:

- 1,250 dry cargo barges with a total capacity of 1,511,203 tons;
- 216 tanker vessels with a total deadweight capacity of 317,255 tons;
- and 118 push-tugs with a combined power of 54,503 kW.

3.3.2.4. REVIVING INTEREST....

In 2002 the European Commission was already estimating the total cost of long-distance road transport to be twice as high as rail transport and five to six times higher than inland waterway or coastal transport. This accounts for the revival of interest in inland waterway transport, which is increasingly being seen as the future solution for transport.

IN WALLONIA AND ...

Along the 450 km of Wallonia's inland waterways, modern facilities - either privately or public-owned - are fitted out for loading, unloading and storing freight. More than 80% of Wallonia's inland waterway network is accessible for standard 1,350 ton Euro-barges, linking up the major seaports with West European economic centres and stretching right through to the Black Sea.

On an international level, the Walloon government is collaborating on the projected Seine-Northern Europe Canal joining Paris and Rotterdam.

According to the Walloon Ministry of Amenities and Transport, inland waterway transport in Wallonia has grown by 800,000 tons in 2006, now reaching a total of 44.5 million tons. In the past ten years, this means of transport has registered a growth of 39%. In the province of Hainaut inland waterway traffic has doubled since 1996 from 310 to 620 million tkm.

IN FLANDERS...

The Flemish government intends to invest € 270 million between 2007 and 2015 by connecting the Seine and the Scheldt. It also intends to facilitate sea-going traffic leaving French seaports.

In addition, it recently compiled a list of bottlenecks impeding the growth of inland waterway transport. A new network called Flanders Inland Shipping Network within the framework of the "Flanders Logistics" project has been made responsible for implementing initiatives to mitigate these problems.

This network is called upon to achieve the following 6 strategic objectives:

- Raising the importance of inland shipping in the logistic chain;
- Inland shipping must become a full-fledged partner of the Flemish seaports;
- Facilitating /supporting innovation,
- Optimizing and stimulating the use of CEMT-class IV waterways;
- Resolving employment problems in this sector
- Improve inland shipping's image as a means of transport.

AND IN THE BRUSSELS' REGION

An action plan for 2005-2009 has been compiled with 68 port activity-supporting measures. Among recent new initiatives, attention is drawn to the subsidies for developing regular containerised services and the promotion of Short Sea Shipping.

3.3.3. SHORT SEA SHIPPING OR "MOTORWAYS OF THE SEAS"

Short Sea Shipping remains a key area in fighting traffic congestion and environmental problems in Europe.

Motorways of the seas are regular, frequent and high-quality door-to-door shipping connections. In the motorways of the sea concept, short sea shipping is the most important means of transport.

Twenty centres promoting short sea shipping are currently active in Europe. Their objective is to convince freight companies and other industries of the inherent advantages of short sea shipping. These initiatives are all backed by the European Commission.

According to data collected by the Promotiebureau Shortsea Shipping, short sea traffic in the 4 Flemish ports is continuing to grow appreciably. In 2006 traffic rose to 120.4 million tons of freight, a growth of 7.3 million tons over 2005. Growth has been no less than 36% since 1999. Slightly more than 50% of the tonnage handled in the Flemish ports is short sea.

In the first half of 2007, **short sea traffic** in the four seaports has once again grown by 5.43% reaching a record volume of 63.33 million tons. Short sea shipping makes up slightly more than 50% of total port traffic in these ports.

Sea-river traffic is also riding high. Even though there was a slight decrease on the Albert Canal, it has increased appreciably on the Brussels-Scheldt Sea Canal.

Promotie Shortsea Shipping Vlaanderen

Straatsburgdok - Noodkaai 1 A
2030 Antwerp
Tel: +32 3 202 05 21
Fax: +32 3 202 05 24
www.shortsea.be



Promotie Binnenvaart Vlaanderen

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3500 Hasselt
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pbv@binnenvaart.be
www.binnenvaart.be





PART 2

Logistics Belgium in pole position

*"Having the right item
in the right quantity
at the right time
at the right place
for the right price."*

INTRODUCTION

The concept of logistics has its roots in the military, initially covering the provisioning of troops to maintain their fighting strength. It follows that the two basic professions in logistics were managing stockpiles of supplies and weapons, and transporting them. This is exactly why modern logistics has its roots in the transport contracting and wholesale businesses.

The liberalization of world trade, the unification of Europe, advances in ICT, the reduction of obstacles to cross-border trade, the increase in goods transported, "just-in-time", outsourcing, etc, are all elements contributing to the growth of importance in logistics services.

YESTERDAY

The first major revolution in logistics occurred at the end of the eighties with the introduction of the Japanese system of "just-in-time" (JIT). The first experiments in just-in-time had been conducted in the early seventies by Taiichi Ohno in Japan at the Toyota car manufacturing plants. JIT is basically a production organization philosophy.

The aim of JIT is to minimize physical stocks via an optimized production and supply chain. Stocks are no longer to be found in warehouses but on the road in trucks.

The late nineties - especially under Chinese influence - saw an increasing shift in focus towards the supply of raw materials from around the world and, after production, the distribution of the finished products. The whole transport sector - by air, sea and land - boomed.

TODAY

With the growth of international trade, transport and logistics service providers have multiplied their expansion strategies aimed at extending their range of services. The race for critical size has picked up. In the logistics sector, this has led to large-scale mergers and in many cases, these expansion strategies have produced a convergence of the transport and logistics profession..

Logistics service providers are increasingly focusing on developing multi-client sites with complementary operations. They have sought to reduce fixed costs by:

- increasing flows significantly in order to lower fixed costs;
- concentrating resources and competences in order to increase their negotiating power with suppliers and/or customers;
- optimizing fleet management using state-of-the-art technology such as real-time tracking and tracing .

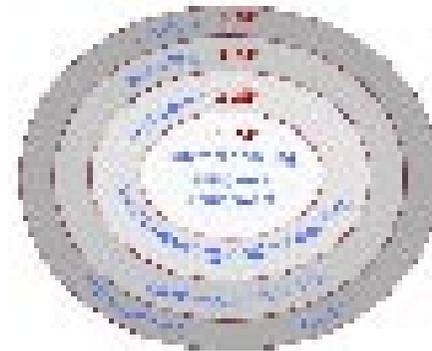
Logistics today is much more than just the operational management of the flows associated with the storage and transport of goods.

It encompasses a company's material, administrative and financial flows, from the supply of raw materials to the distribution of the finished products and including interfaces with distribution networks, suppliers and subcontractors.

Logistics is starting to evolve from a 3LSP organization (logistics service provider offering handling and value-added services in addition to transport, warehousing and forwarding) to a 4LSP organization where information flows steer the flow of goods (and all related activities) and where added value is provided via inventory management, fleet management, etc.

As a reminder:

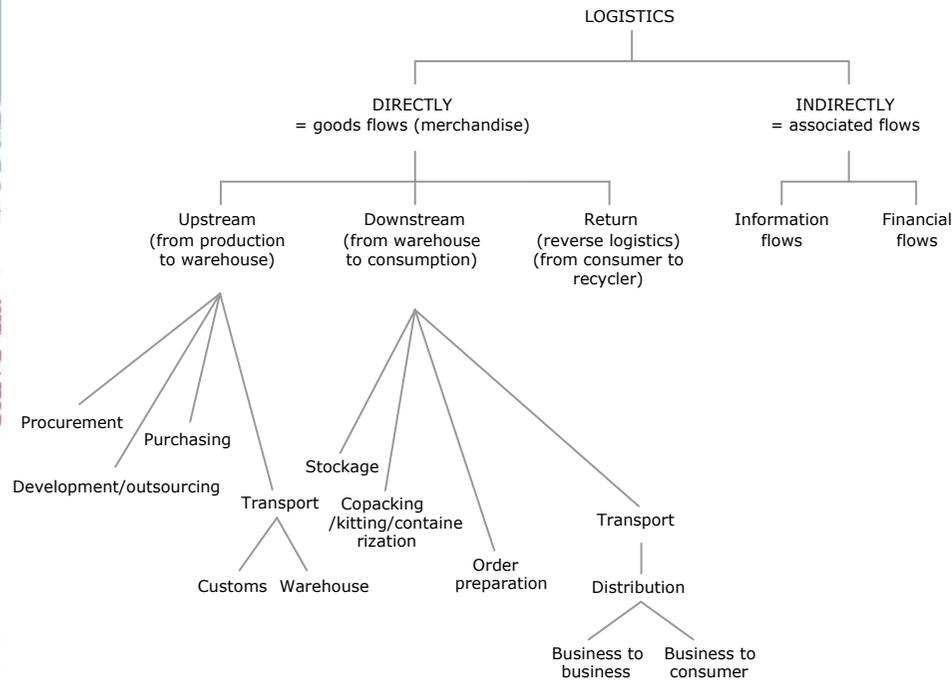
- 1LSP: internal handling using own equipment
- 2LSP: transport, warehousing and forwarding
- 3LSP : 2LSP+ handling and value added services
- 4LSP : 3LSP + design, control and management



¹ Tracking is the monitoring of a truck's position, normally done in real-time. In other words, dispatching receives a signal every x minutes from the truck's on-board computer stating its geographical coordinates. Tracing is the post-analysis of a shipment's movements along the supply chain. The term "tracking & tracing" is often confused with fleet management. Tracking & tracing requires an on-board computer or black box with a GPS module for communication with the satellite network and a module for transmitting the data to the back office. For more information: Truck & Business No. 197 pg. 54 ff



Graph 1: Logistics in general



Graph 2: Logistics from a managerial point of view

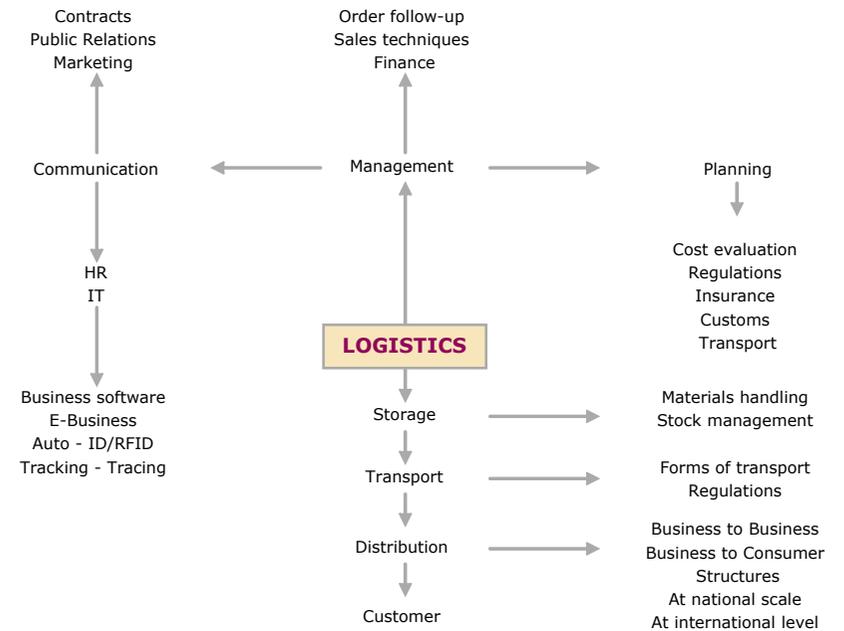


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Importance of logistics

ON A GLOBAL AND EUROPEAN LEVEL

On a **global** level, the logistics sector represents around € 5,400 billion or 13.8% of total world GNP. Annual expenditure on logistics amounts to around € 1,000 billion in Europe and North America, representing between 10 and 15% of the final cost of finished goods. These costs include both transport and storage.

According to a survey conducted by strategy consultants Roland Berger ("Definition of a differentiation strategy for Wallonia" – final document – UWE (Union of Walloon Enterprises)), total EU-wide expenditure on logistics is expected to rise at an estimated 5-6% a year between 2003 and 2010 for the following reasons:

- outsourcing,
- the continuing optimization of inventory levels,
- reduced go-to-market lead times,
- global procurement (ex. East Europe),
- trademark rationalization.

In the EU, competition remains extremely strong. Logistics is not always entrusted to third party contractors as is shown by the weak concentration of outsourced logistics in Europe, where the twenty principal companies have a combined market share of just 33%.

IN BELGIUM

In Belgium there is as yet no precise definition of logistics. However the Belgian National Bank has begun to analyze and separately quantify this sector. Even if it has not yet been given a distinct NACE code, a distinction is made between the infrastructure and the players.

1.1. INFRASTRUCTURE

Knowing that the main **logistics gateways** are **ports and airports**, it has been adequately proven in the first half of the survey that Belgium is particularly well-endowed.

Belgium is also rich in **logistics parks** and **multimodal transport centres**, the second important link in the logistics chain. **European** and **regional distribution centres** are also becoming more numerous within the country (see chapter: Logistics region by region).

Underlying all these elements of the logistics chain is an **infrastructure** which can only be described as excellent (road, rail and waterway network) and which plays a major role in Belgium's success as a logistics hub.

Belgium has 4 main logistics arteries:

- the Brussels-Antwerp artery consisting of two motorways, the E19 and A12 connecting the two cities;
- the Antwerp-Ghent artery developed along the E17;
- the third artery is in Wallonia and links Mons with Liège via Charleroi; it is concentrated around the E42;
- the artery linking Liège with Antwerp along the motorways E313, E19, E34 and E314 heading towards the Netherlands.





1.2. PLAYERS

Over the past several years we have been seeing a transition from the classical transport contractor company to a logistics service provider whose services are becoming more varied, gaining in added value and where the transport element can even become secondary. While the first half of the survey essentially focused on transport companies, transport organizers will be spotlighted in the second half.

The players in the logistics sector are:

- first and foremost the **logistics service providers (LSP)** and the **shippers**. Their operations range from a single service (just transport) to "full-service". Certain LSPs have actually succeeded in becoming full line suppliers, able to take over a wide range of logistics and semi-industrial operations for a number of customers. Given the emergence of multinational companies, they are bringing their customers competency in interface management and becoming actively involved in supplying products at lowest cost, minimum delay and highest service quality.
- the **specialists in internal logistics solutions**. This category encompasses companies offering complete solutions for supply chains, storage, warehousing, storage systems, forklifts, conveyor belts – in short any product or system capable of facilitating or accelerating the flow of goods.
- the **mobile communication providers**, the **specialists for computerized ordering and inventory management systems**, **goods tracking systems** such as RFID (Radio Frequency Identification), voice recognition, **etc.**
- the **infrastructure managers**, companies specialized in the sale and rental of warehouses and storage areas; management consultants; temporary personnel recruitment agencies, etc.

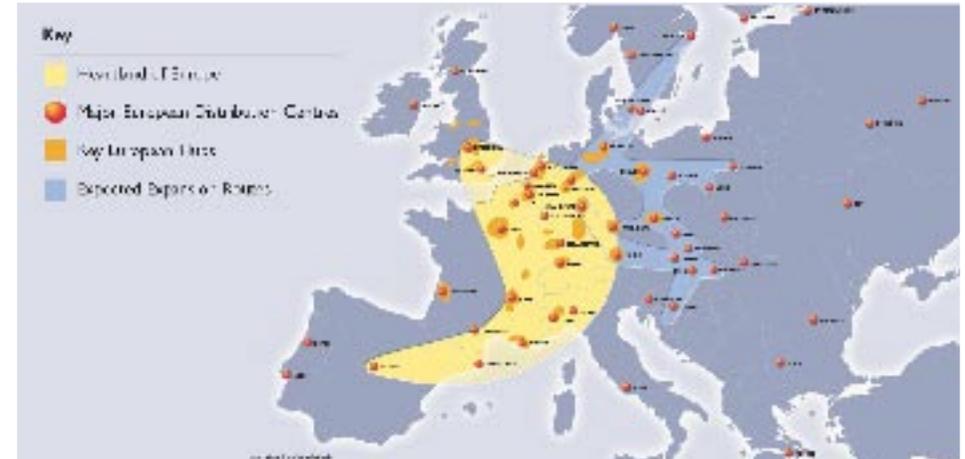
All these activities are not just creating employment but also generating a significant amount of added value.



1.3. BELGIUM'S ASSETS

1.3.1. GEOGRAPHICAL AND HUMAN

One of Belgium's major assets is its **central position**. European cities can be reached in very short time whatever means of transport is used. Thanks to its infrastructure Belgium occupies a privileged place in logistics and distribution. It is right in the middle of a zone called the "European logistics banana", the logistics and distribution heart of Europe, as shown below:



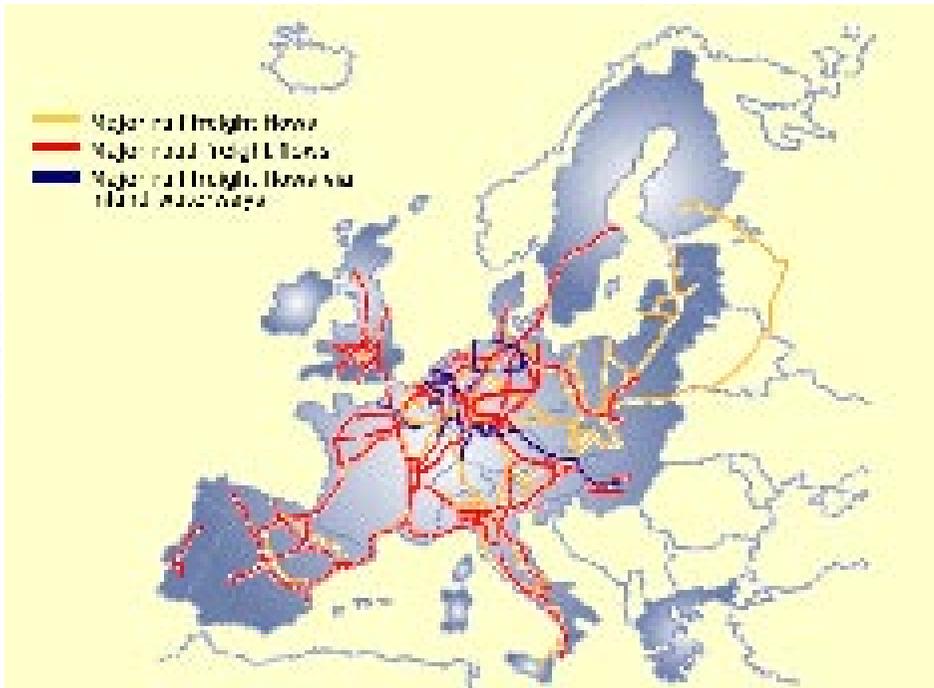
Source: Cushman & Wakefield

More than 60% of the European consumer market lies within an 8-hour, 600 km truck drive, including such major cities as Paris, London and Amsterdam.

Table 11: Summary of distances between Belgium and a number of European capitals

	Distance in km	Journey time	
		By truck	By plane
Berlin	774	7hr05	1hr20
London	309	4hr45	1hr05
Madrid	1604	14hr45	2hr30
Lisbon	2231	20hr19	2hr50
Moscow	2582	31hr48	3hr20
Prague	918	8hr50	1hr25

Table 12: Major rail and road freight flows - Major freight flows via inland waterways



Source: Vil

Its ideal position at the crossroads of consumer and production zones makes the "banana" a very attractive investment region for logistics (European distribution centres (EDC), European logistics centres (ELC), etc). A major motivation for FDI (foreign direct investment) in Belgium is actually being able to service the European market or at least its most developed core.

It is therefore not astonishing that in the EDC ranking Belgium takes third place (8%) behind France (21%) and Hungary (11%).

H&M

To illustrate this, H&M, the Scandinavian clothing chain, communicated that it intends to build a new distribution centre in Belgium, probably in Hainaut. Based in either Baudour or La Louvière some 150 trucks will service France, Italy, Spain and Greece. The centre should generate no less than 600 jobs. The existing H&M facilities at Puurs (mainly logistics, IT and accounting) will remain unaffected.

Belgium's reputation as a logistics and distribution location has been confirmed more than once by the **European Distribution Report 2006**, published by **Cushman & Wakefield Healy & Baker**, which takes into account 15 different factors such as property costs, labour costs, access, road congestion, freight, supply of property & land.

According to this report, Belgium retains its title since the last report and ranks as the top country in Europe to locate a distribution or logistics centre. Belgium's assets are its low rents and good accessibility. In second place comes France, which has lower building costs and land prices than Belgium and scores well in terms of property and market size, followed by the Netherlands, where there has been a relative improvement in cost competitiveness.

Table 13: Country rankings

	Rank		Total 2005	
	2001	2003	Score	Rank
Belgium	1	1	5.4	1
France	4	2	6.7	2
Netherlands	2	4	7.1	3
Czech Republic	5	5	7.5	4
Poland	7	6	7.9	5
Germany	3	3	8.0	6
Hungary	10	8	8.1	7
Italy	6	9	8.1	8
Austria	8	7	8.2	9
UK	10	10	9.0	10

Source: Cushman & Wakefield /Various



As the above table confirms, Belgium is in pole position regarding its attractiveness for logistics companies.

Short summary of Belgium's strong points:

- Belgium's **costs** are **all in all lower** than the European average.
- According to the latest ILO (International Labour Organisation - Geneva) report, Belgian workers' **productivity** is, at € 40,540, amongst the highest in the world.
- **The Belgian workforce** is well-trained, highly educated and among Europe's most multilingual. **Foreign nationals** working in Belgium can benefit from expatriate tax status.
- Belgium is in a very good position compared with the rest of Europe thanks to its already mentioned **excellent road and rail infrastructures** and inland waterway networks.
- As regards **accessibility**, Belgium benefits from its central position and is not too far away from East Europe
- The Belgian **communications** infrastructure is very well-advanced: 96% of companies are connected to Internet (70% by broadband) compared with the European average of 89% (53% by broadband) (Source: Eurostat 2005).
- **Fiscal rulings** (Income Tax, VAT and Customs) can be obtained within 3 to 6 months via a unique and dedicated fiscal rulings office.
- **Notional Interest Deduction on shareholders' equity** only in Belgium.
- Last but not least, a survey of 672 executives conducted by Cap Gemini Ernst & Young in 2004 has shown that the quality of life, the **quality of the labour market**, the excellent telecommunications infrastructure, the stability of the social climate and the transport and logistics infrastructure are Belgium's five prime assets as a place for setting up a new company (Source: Ernst & Young).

On a regional scale, Wallonia is hard on Flanders' heels. Flanders is in a leading position thanks to its transport system, its accessibility and its well-developed know-how. However costs are lower in Wallonia compared with Flanders and the availability of land compensates the lower productivity. It should be noted that in terms of attractiveness for logistics companies on a European level, Wallonia has made an incredible leap forwards, jumping from 7th to 2nd place in the ranking compiled by Cushman & Wakefield and commissioned by the Flemish Logistics Institute (Vlaams Instituut voor Logistiek/VIL), which wanted to know Flanders' position in logistics and distribution.

Table 14: Ranking by region

	Costs	Freight	Access	Supply	Labour	Know How	Score	Ranking 2006
Flanders (B)	6.6	1.7	1.2	1.6	4.1	2.1	5.1	1
Wallonia (B)	6.0	2.2	1.2	1.8	3.8	4.4	5.2	2
Nord-Pas-de-Calais (F)	4.9	2.4	1.7	2.0	4.6	5.0	5.3	3
Saar (D)	4.6	3.3	1.8	1.2	3.5	4.3	5.6	4
Ile-de-France (F)	6.2	1.8	2.3	2.6	1.7	3.7	5.8	5
Est (F)	5.0	3.0	1.7	2.4	4.8	5.0	5.8	6
Brus.-Cap. (B)	8.7	1.7	1.0	2.6	1.1	3.0	5.8	7
North Rhine Westphalia (D)	8.7	2.5	0.8	2.0	4.0	3.8	6.3	8
South-Netherlands (NL)	8.9	2.2	0.7	1.9	10.2	2.7	6.5	9
Rheinland-Palatinate (D)	7.4	3.3	1.3	1.9	5.3	4.2	6.7	10

Source: Cushman & Wakefield (2006)

According to a Roland Berger logistics survey, Wallonia's main strong points are its geographical position and its undeveloped potential (availability of land at an attractive price, availability of a qualified workforce and an uncongested road network. In addition, Wallonia is geographically the hub of an area containing a major share of European consumption. Within its radius we find not only Europe's main ports (Antwerp, Rotterdam, Hamburg, Zeebrugge, Dunkirk and Le Havre) but also the main passenger and freight airports.

As regards the provinces, the VIL publication "Vergelijking van toplocaties voor Europese distributie en logistiek 2006" (Comparison of top locations for European distribution and logistics companies 2006) gives top marks to the

Flemish provinces Limburg and Antwerp. These are closely followed by the Walloon provinces Liège and Hainaut.

Belgium as a whole captured 10% of new EDC's (European Distribution Centers) between 1997 and 2002. 100 are in Wallonia against 400 in Flanders (see below).

Table 15: Ranking by province

	Costs	Freight	Access	Supply	Labour	Know How	Score	Ranking 2006
Limburg	5.4	2.0	1.0	1.3	3.6	1.7	2.4	1
Liège	6.0	1.5	1.0	2.3	3.2	2.5	2.5	2
Hainaut	5.4	2.3	2.1	1.3	2.8	3.3	2.8	3
Antwerp	7.9	1.4	1.3	2.3	1.8	1.0	2.9	4
Düsseldorf	9.1	1.6	0.7	2.5	2.0	2.5	3.1	5
Namur	6.2	2.4	1.8	2.8	2.5	3.5	3.1	6
Flemish Brabant	8.2	1.8	1.4	2.5	2.5	2.3	3.2	7
Alsace	5.2	2.8	2.3	3.0	3.7	3.8	3.2	8
Nord-Pas-de-Calais	5.4	2.5	2.7	2.5	3.4	3.8	3.3	9
East Flanders	7.0	2.0	2.4	2.3	3.3	2.0	3.3	10

Source: Cushman & Wakefield 2006

Antwerp and Brussels are ideal sites for products with a very high rotation ("fast movers"). On the other hand Limburg and Liège are attractive for customers whose goods must be transported and distributed in large quantities without time being an essential factor.

According to Cushman & Wakefield's report this advantageous situation should continue in the near future. A forecast for 2019 thus ranks 8 provinces among the top 11 of European provinces from a logistics perspective. This classification is as follows: 1. Limburg (B), 2 Liège (B), 3 Hainaut (B), 4 Nord-Pas-de-Calais (F), 5 Antwerp (B), 6 Alsace (F), 7 Namur (B), 8 Picardy (F), 9 East Flanders (B) , 10 West Flanders (B)

Even though it seems evident that logistics will shift eastwards in the near future, this shift will only have a moderate impact on the current logistics hot spots.

1.3.2. LOGISTICS SPACE

Belgium offers 7 million square meters of logistics space and has one of the highest densities of such sites in Europe. On average, 500,000 square meters are rented out yearly. Most of this is in the form of storage facilities of 5,000 square meters or more located in the Antwerp-Brussels-Ghent 'Golden Triangle'. Over 1.5 million square meters are waiting in the pipeline for property development.

In 2006, the average rental for logistics space (at prime sites) in **Belgium** was **EUR 47 per square meter** per year. In **Brussels, it reached EUR 53**. This is one of the lowest averages in Europe.

Although the amount of logistics space on offer in Belgium is decreasing and demand rising, rentals have remained relatively stable throughout 2007.

According to Peter Demuyne from Cushman & Wakefield Belgium, everything points towards further growth in semi-industrial and logistics projects in both Flanders and Wallonia. Although demand for logistics buildings represents just 14% of total demand for semi-industrial, semi-industrial/logistics and logistics needs, it represents 600,000m² of the overall annual demand of at least 1,000,000m². These figures confirm the sector's importance.



// The profession of "transport organizer"

2.1. LICENCES

In Belgium you cannot simply become a transport organizer.

A licence is required to become a transport agent, a transport broker and a forwarding agent.

Requirements to be fulfilled to practice the profession include proof of financial capacity (surety), probity, and professional competence.

All these regulations are based on the Law of 26 June 1967 relating to goods transport auxiliaries. The practical details for the execution of this framework-law are defined in two Royal Decrees:

- The Royal Decree of 18 July 1975 introducing a licence for transport agents,
- The Royal Decree of 12 January 1978 introducing a licence for transport brokers.

The full texts in French and Dutch are available on www.mobilit.fgov.be.

The alphabetical list of transport agents (78 pages) and brokers (4 pages) is available on:

www.mobilit.fgov.be/data/LCOMMIS.pdf and
www.mobilit.fgov.be/data/route/LMAKCOUR.pdf.

The Belgian Institute of Transport Organizers (www.bito-ibot.be) recently conducted a "socio-economic analysis of the transport organizing sector - 2007", arriving at the following conclusions:

1. The transport organizer sector has developed strongly in the last few years with a **near 2% average job creation rate**. At the end of 2005, the sector was generating almost 45,000 jobs;
2. **The increase in employment is considerable**, especially among "pure transport organizers". This contrasts with the road transport sector where growth is weak;

3. Job creation is taking place **especially in the sector's largest companies**;
4. The analysis of **value added confirms this growth**: for transport organizers this is almost twice as high as GNP growth;
5. Looking at efficiency (value added per employee), the sub-sector "pure transport organizers" also registers a better result than that of "(road) transport organizers";
6. Employee training is gaining in importance;
7. The analysis of the sector's financial health shows that most companies are in a good financial situation, with only 4.2% experiencing problems;
8. Profitability is down slightly, after a general improvement since 2003;
9. Liquidity has grown slightly. Solvency has improved despite a slight reduction in cash flow;
10. The number of days to payment has not changed though suppliers are being paid quicker.

The Federation of Enterprises in Belgium (FEB) is currently working on establishing criteria regulating the logistics profession. Logistics is a very popular subject at present, with training courses being offered all over Europe. However their quality and level sometimes differ, leading to a growing interest in a more precise definition of the different actors' roles.

2.2. COMPANIES OPERATING IN THE FIELD OF LOGISTICS ...

IN FLANDERS ...

Looking at Flanders, here are some representative companies:

Ahlers Bridge nv

Noorderlaan 139
2030 Antwerp
Tel: +32 3 543 72 11
Fax: +32 3 543 74 77
info@ahlers.com
www.ahlers.com



BLITS Belgium nv

Heindonksesteenweg 2
2830 Willebroek
Tel: +32 475 29 17 55
www.blits.biz



De Baerdemaecker nv

Port Arthurlaan 40
9000 Ghent
Tel: +32 9 251 25 45
Fax: +32 9 251 61 81
hq@debaerdemaecker.com
www.debaerdemaecker.com



De Rijke nv

Kruisweg 8
2040 Antwerp
Tel: +32 3 568 30 30
Fax: +32 3 568 30 35
infoantwerpen@derijke.com
www.derijke.com



Groep H. Essers

Transportlaan 4
3600 Genk
Tel: +32 89 32 32 32
Fax: +32 89 32 32 33
info.essers@hes.essers.com
www.essers.com



Ewals Cargo Care nv

Henry fordlaan 20
3600 Genk
Tel: +32 89 32 93 11
Fax: +32 89 32 93 02
www.ewals.com



Gheys Transport nv

Kapellestraat 41
2400 Mol
Tel: +32 14 81 21 21
Fax: +32 14 81 66 55
info@gheys.com
www.gheys.com



Hessenatie Logistics nv

Schaliënstraat 3
2000 Antwerp
Tel: +32 3 216 59 00
Fax: +32 3 216 59 92
info@heslog.be
www.heslog.be



Janssen Expeditie & Transport nv

Nijverheidslaan 1515
3660 Opglabbeek
Tel: +32 89 81 05 00
Fax: +32 89 81 05 19
Sales@jet-exp.eu
www.jet-exp.eu



Nova Natie Logistics

Schomhoeveweg 13
2030 Antwerp
Tel: +32 3 540 50 15
stefan.cassimon@nova.be
www.nova.be



Schenker nv

Atlantic House Noorderlaan 147
2030 Antwerp
Tel: +32 3 543 62 11
Fax: +32 3 543 62 22
info.be@schenker.com
www.schenker.be



Snel G. Transport Belgium

E3-laan 62-66
9800 Deinze
Tel: +32 9 381 51 00
Fax: +32 9 386 88 09
www.gsnel.net



IN WALLONIA...

The "Warehouse & Logistics" journal dedicated a whole issue to logistics in Wallonia called "Set up your Logistics in Wallonia 2007". Here one can find the list (see below) of logistics service providers (with complete contact details and descriptions of operations) based in Wallonia.

Ceva Logistics Belgium¹

Koningin Astridlaan 12
2830 Willebroek
Tel: +32 3 860 45 00
Fax: +32 3 886 86 30
sales@be.cevalogistics.com
www.cevalogistics.com



CTB Magemon sa

Ile Monsin 85
4020 Liège
Tel: +32 4 240 78 11
Fax: +32 4 240 78 18
info@ctbmagemon.com
www.ctbmagemon.com



Decoster & Cie SPRL

Chemin de la Guelenne 38
7060 Soignies
Tel: +32 67 34 76 10
Fax: +32 67 33 00 55
info@decostertransports.com
www.decostertransports.com



Groupe Gustave Portier Industries

Sart d'Avette 110
4400 Flémalle (Awirs)
Tel: +32 4 273 72 00
Fax: +32 4 275 65 09
info@group-portier.be
www.group-portier.be



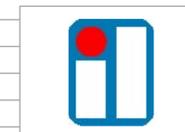
Jean Heck

Siebeponisweg 9
4700 Eupen
Tel: +32 87 89 99 11
Fax: +32 87 88 34 85
info@jeanheck.be
www.jeanheck.be



Interlogistics SA

Garocentre Nord D 24
7100 Houdeng-Goegnies
Tel: +32 64 21 73 68
Fax: +32 64 21 73 70
interlogistics@interlogistics.be
www.interlogistics.be



Jost Logistics SA

ZI des Hauts Sarts, 4^e venue 66
4040 Herstal
Tel: +32 4 264 95 86
Fax: +32 4 240 14 60
info@jostgroup.com
www.jostgroup.com



King Freeze

Rue Jean de Selys Lonchamps, 9 b
4460 Grâce-Hollogne (Liège Logistics)
Tel: +32 4 366 60 60
Fax: +32 4 366 60 66
kingfreeze@kingfreeze.be
www.kingfreeze.be



Michel Logistics SA

Garocentre nord- rue de l'ysier E2
7110 Houdeng-Goegnies
Tel: +32 64 27 88 88
Fax: +32 64 27 88 90
didier.michel@grouptfm.be
www.michellogistics.be



Mozer

Avenue de l'Expansion 1
4432 Alleur
Tel: +32 4 246 41 41
Fax: +32 4 246 42 49
info@mozer.be
www.mozer.be



Somef

Rue de l'Ile Monsin 7
4000 Liège
Tel: +32 4 264 84 30
Fax: +32 4 264 85 93
sales@somef.be
www.somef.be



¹ Although Ceva (ex-TNT) has its registered offices in Willebroek, company operations are concentrated in Courcelles where it is responsible for the European distribution of pharmaceutical company Johnson & Johnson's products

TDG-MOND

Rue de l'Industrie, 14
4840 Welkenraedt
Tel: +32 87 89 91 11
Fax: +32 87 89 91 15
admin@mond.be
www.mond.be



Ziegler

Rue Dieudonné Lefèvre 160
1020 Brussels
Tel.: +32 2 422 22 99
Fax: +32 2 422 21 04
www.zieglergroup.com



TTS Group sa

8 Rue de l'Aéropostale
4460 Grâce-Hollogne
Tel: +32 4 247 77 00
Fax: +32 4 247 88 88
josysheeren@tts.be
www.tts.be



IN THE BRUSSELS-CAPITAL REGION

Key players in Brussels are i.a. ABX Logistics Worldwide, Reibel, TRW and, naturally, Ziegler:

ABX Logistics

Rue des Deux Gares 150 Tweestationsstraat
1070 Brussels
Tel: + 32 2 556 66 66
Fax: +32 2 556 66 65
info@abxlogistics.be
www.abxlogistics.com



Reibel nv/sa

Av.de Vilvorde 200
1000 Brussels
Tel.:+ 32 2 421 99 11
Fax: + 32 2 421 99 40
www.reibel.be



TRW nv/sa

Havenlaan 100 Avenue du Port B
1000 Brussels
Tel.: + 32 54 51 12 11
Fax: + 32 2 425 59 59
dg@trw.be
www.trw.be





Logistics region by region

Logistics services are an indispensable ingredient of a modern economy. They stimulate creativity by helping companies to react to market pressures and innovate in new technologies and services and in human resources. They are a major determinant of a region's attractiveness for foreign investors.

Aware of the sector's importance, state authorities in all three regions have placed logistics at the top of their priority lists, greatly increased their support operations for this sector and established dedicated bodies to support and stimulate this branch of the Belgian economy.



3.1. FLANDERS

3.1.1. ON A POLITICAL LEVEL

As one of Europe's top three logistics regions, Flanders is focusing on maintaining and strengthening its role as a well-oiled logistics hub. Its objective is to remain a logistics **"hotspot"**.

Thanks to its excellent logistics network coverage and its large number of "access ports", Flanders offers tremendous economic development potential in such areas as storage, distribution, transport and transit. The Flemish regional government is well aware of these assets and of logistics' exemplary role as a value-adding sector. For this reason it has made logistics one of the pillars of its July 2006 Plan "Vlaanderen in Actie" (VIA), a socio-economic stimulus for Flanders (www.vlaanderen.be/vlaanderen-in-actie).

In the chapter titled "Challenge III: Sustainable Gateway to Europe", the objective is clearly specified – to make densely-populated Flanders an efficient international entry, storage and transit point. At the same time, attention is being given to environmental considerations, with the focus on sustainable infrastructural investments based on the sustainable management of natural resources.

In March 2006 "Flanders Logistics" (www.flanderslogistics.be) came into being with the publication of the vision memo "Flanders Logistics- Logistiek Vlaanderen - bouwstenen voor de welvaart in Vlaanderen" (building blocks for welfare in Flanders). This vision, focusing on 7 strategic themes (see below),

confirms the importance of logistics for the Flanders economy. Its pillars are employment and training, mobility, public works and site development.

The 7 strategic themes are:

- better capacity exploitation of the multimodal infrastructure,
- streamlining legislation,
- setting up logistics clusters,
- alternative financing for infrastructure,
- activating the education and labour market,
- promotion of R&D and innovation
- targeted communication

Within the framework of this project, logistics agencies have been established and pilot projects identified. These agencies will promote collaboration between logistics companies offering similar logistics services.

Together with the logistics sector, the Flanders government wants to strengthen Flanders' unique position and secure its future. This is the reason behind the establishment of the VIL.

FLANDERS INSTITUTE FOR LOGISTICS (VIL) – KNOWLEDGE CENTRE

The VIL develops logistics knowledge which is implemented in companies through pilot projects.

Flanders Institute for Logistics

Jordaenskaai 25
2000 Antwerp
Tel: +32 3 229 05 00
Fax: +32 3 229 05 10
info@vil.be
www.vil.be



The Flanders Institute for Logistics (VIL) was established in 2003 to provide sustainable support for the industry in the region and to strengthen its competitiveness. The institute's work is built around studies in transport modes, value-added concepts and technologies, partnerships as well as continually



charting the region's logistics industry and platforms. Its research within these areas falls into the following categories:

- state of affairs studies,
- strategic working groups, cooperation projects with other national and international organizations and
- contract research.

The Institute has been involved in a number of international studies into new technologies as well as more regionally oriented work.

VIL's mission can be summarized as follows:

The further strengthening of the Flanders logistics sector's competitive advantage via:

- innovation ,
- knowledge creation, gathering and sharing,
- pilot projects,
- knowledge transfer,
- networking and supervision.

VIL sets itself 3 main goals in order to fulfil its mission:

- to improve the presence and the competitiveness of the Flemish companies in the logistics sector,
- to reinforce Flanders as a Gateway for Europe,
- to build an (international) network around the VIL.

In summary, Flanders Logistics is a **coordinating platform** for:

- concepts (Extended Gateway®),
- initiatives (Flanders Port Area, Flanders Inland Shipping Network),
- projects (pilots),
- collaboration,
- events.

The VIL's pilot projects pay quite some attention to cooperation projects. In order to spotlight this focus, C*Stars (Clustering-Strategic Action Programme for increasing output through Synergy) has been started up. This action programme stimulates clustering and offers companies the opportunity to merge their logistics cargo flows with other companies', gaining larger flows which can be carried via alternative means of transport. With the know-how it has acquired, the VIL is able to act as a facilitator in the clustering process. Clustering fits also into the concept of "extended gateways" that VIL has launched.

Primary Tasks	Knowledge creation, gathering and sharing	Promotion	
	<ul style="list-style-type: none"> ■ bringing vision, expertise, knowledge and innovation to the logistics sector through strategic workgroups; ■ conceptual and technological innovation for logistics; ■ becoming and institute with a solid international recognition in logistics and supply chain management; ■ team of researchers and strong partnerships with other knowledge centres. 	<ul style="list-style-type: none"> ■ attracting logistics operations; ■ promotion of Flanders; ■ dedicated assistance and guidance in logistics to foreign investors; ■ integration in the network of Flanders Investment and Trade. 	
Secondary Tasks	Knowledge transfer	Assistance	Networking
	<ul style="list-style-type: none"> ■ matching of supply and demand with regard to education and training; ■ conferences, seminars, workshops. 	<ul style="list-style-type: none"> ■ assisting companies involved in knowledge projects; ■ benchmarking; ■ assistance to foreign investors. 	<ul style="list-style-type: none"> ■ international recognition; ■ services for its members; ■ platform function.

Source: VIL



Source: VIL

DEFINITION OF THE CONCEPT OF EXTENDED GATEWAYS®

Alex Van Breedam, managing director of the VIL, defines this concept as follows:

"The Extended Gateway concept relates to an extension of added value activities in the logistics area beyond the traditional gateways, which is done by locating logistics activities at newly multi-modal-equipped places where in the long run the lowest overall logistics cost will be achieved. The basic idea is that logistics operations are to settle at places which yield a minimum overall logistics cost for companies. Logistics operations for volume products should rather settle close to a "gateway", so that the transshipment cost, as an important component of the overall logistics cost, can be kept under control. Time-critical consumption should move to the hinterland network, since from there Europe can be served more easily. Our project provides precise identification of logistics hotspots suitable for the clustering of specific logistics activities. Bundling opportunities in these hotspots create bulk cargo flows between the "gateway" and its extension. The cargo flow's bulky aspect has a positive effect on the overall logistics cost and so on multimodal operations as well. Studies are being done for every province."

3.1.2. ON A PRACTICAL LEVEL

3.1.2.1. IMPORTANCE

In concrete terms, **logistics** are of major importance for Flanders, being an essential element of its economy. The sector:

- **contributes 9% of GNP,**
- **currently employs more than 120,000 people and**
- **generates € 8,600,000,000 of added value**

As stated in the brochure "Logistics in Flanders" published by Flanders Investment & Trade (www.flandersinvestmentandtrade.be), one of Flanders' major logistics assets is without doubt the port of Antwerp. It is the second largest port in Europe offering a plethora of services and facilities like storage, handling and bonded warehouses. According to the Antwerp Chamber of Commerce "Routeplan 2012", logistics and transport should account for 7% of employment (29,600 jobs), 14% of added value (€2.7 billion) and 21% of investment (€1.3 billion) in the region in the next few years.

Flanders also has other major ports, well-developed and integrated road, rail and inland waterway networks and an international airport. As stated by the FIT, Flanders offers logistics operators:

- **an ideal situation,**
- **an appropriate platform and**
- **a suitable infrastructure.**

Logistics operations in Flanders cover a wide range of sectors and encompass both companies working for their own account and logistics contractors. Examples of major specialized companies are:

- Caterpillar,
- Hessenatie Logistics,
- Katoen Natie,
- Furness Logistics,
- Essers and
- NYK Logistics supplying/forwarding Pioneer, Minolta, Casio, Kuraray, Doc Martens, Isuzu and Subaru products.

In the automotive industry, logistics customers are:

- Harley-Davidson,
- Hyundai,
- Isuzu,
- Komatsu,
- Mazda,
- Subaru and
- Toyota, as well as
- Four car manufacturing factories, bus, truck and other special vehicle manufacturers and more than 260 suppliers based in Flanders.

Flanders is also the base of a number of scientific and medical companies, all with growing logistics requirements. These include:

- Janssen Pharmaceutica,
- Pfizer,
- AstraZeneca,
- Alcon and
- Schering Plough.
- The Becton Dickinson distribution centre at Temse services 80 countries and handles 1.3 million orders per annum.

Bose Corporation, Duracell, Nike, Shamrock Technologies, SKF and Staples are well-known companies in other sectors also having logistics platforms in Flanders.

3.1.2.2. EUROPEAN DISTRIBUTION CENTRES

Flanders has some **400 European distribution centres**, i.e. ± 3 EDCs per 100 km².

These are mainly concentrated in the port zone (Antwerp and East Flanders). A recent survey by the Flanders Institute for Logistics (VIL) showed that these centres (Procter & Gamble, Samsonite, Black & Decker, Duracell, SKF, Toyota, Honda, Volvo, Scania, Nike, etc.) provide direct employment for some 25,000 people and have an annual turnover of € 6.6 billion.

Europe's largest distribution centre, the Nike facility at Laakdal, is in Flanders.

The presence of such centres bears witness to Flanders' expertise in distribution operations. They prove to be a true magnet for foreign companies looking for locations for their distribution operations.

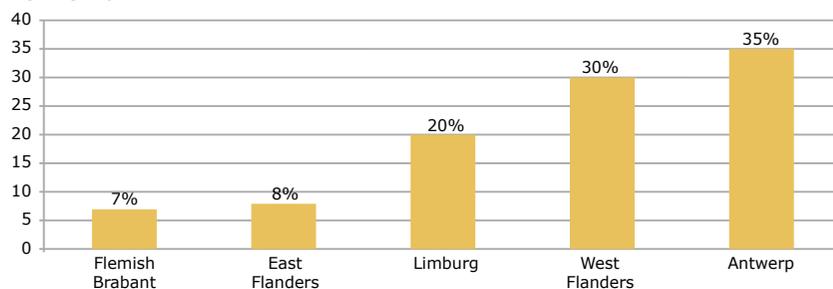
More than 57% of these centres are operated by outside contractors such as NYK and Caterpillar Logistics. The remaining 43% represent the internal operations of companies like Bridgestone, Nike and SKF.

In total, 20% of distribution centres belong to the chemicals industry, 16% to automotive, 13% to the food industry and 12% to the electronics, IT and telecom sector.

Toyota at Diest

Toyota's European Distribution Centre (EDC) at Diest has recently expanded available storage space by 30,000 m². Parts are sent from Diest to national distribution centres in all European countries, North Africa, Israel and Turkey. Diest is also the supply platform for 650 local distributors in the Benelux, northern France and western Germany.

EDC geographic distribution:



Whilst the Province of Antwerp is top of the list, the Province of Limburg is doing well thanks to the Albert Canal and the two motorways E313 and E314, where

a number of well-known companies such as Ikea Distribution Benelux, Power Tools Distribution, SKF European Distribution Centre, Mobis Parts Europe and Nike as already mentioned, have their distribution centres. Some production plants have also developed associated logistics clusters, as is the case with Ford in Genk. The port of Genk offers trimodal facilities too.

Almost 42% of products handled in these centres come from Western Europe. 60% of foodstuffs originate from France. About 57% of pharmaceutical products flowing through the Flemish centres are imported from the United States or Canada.

Around 54% of the products reach the centres by road with a further 30% arriving in Flanders by sea. Companies such as Nike are using waterways more and more to transport their goods from the ports to their centres.

The value-added operations carried out in the centres generally involve packaging, labelling, pre-delivery, customs formalities, returns and quality control.

Hereafter the names of some of the companies running their own European distribution centres or wider logistics operations from bases in Flanders:

Atlas Copco - Black & Decker - Bombardier Europe - Bose - Bridgestone-Firestone - Daikin Europe - Estée Lauder Distribution - Federal Mogul Corporation - Hyundai Motor Europe Parts - Mazda Motor Logistics - Monsanto Europe - Nike European Holding - Nitto Europe - Samsonite Europe - Shering Plough - Sony Service Center - Tenneco Automotive Europe - Toyota.

For instance:

Nike CSC-EMEA Logistics Centre

Nike's European logistics centre in Laakdal has become a logistics knowledge centre. All logistics operations for 700 factories and 50,000 customers in the European, Middle Eastern and African markets are coordinated here.

The core business consists of three types of operations: goods entering, storage and goods leaving.

More than 80% of goods entering are containerized, arriving by waterway via Rotterdam and Antwerp. 96% of water-borne freight uses the Albert Canal.

Goods (apparel, footwear and equipment) arriving at Nike are re-sorted and stocked. At present Nike employs almost 2,000 people.

After being packaged at the EDC, goods are dispatched to more than 60 countries. Customers are generally retailers, explaining the importance of Nike's decentralized approach.

3.2. WALLONIA

3.2.1. ON A POLITICAL LEVEL

The Walloon Region has a number of logistics assets, one of the most important being **Liège Logistics**, the only quadri-modal platform (water, rail, road and air) in Belgium.

The Walloon Government has made the development of logistics a **political priority in the Region's economic recovery framework**. Bear in mind that in August 2005 the Walloon Region adopted the Marshall Plan, which includes establishing competitiveness hubs with the intention of strengthening the attractiveness and competitiveness of Walloon companies.

In July 2006, 5 clusters were identified and named. The "**Logistics in Wallonia**" cluster is of particular relevance:

Logistics in Wallonia

Complexe Arrobas
Parc Artisanal 11-13
4671 Blegny-Barchon
Tel: + 32 4 387 88 26
Fax: + 32 4 387 87 39
info@logisticsinwallonia.be
www.logisticsinwallonia.be



Logistics in Wallonia (president: Niky Terazakis, managing director of TNT Airways) is the result of the merger of the logistics competitive cluster defined in the Marshall Plan and the logistics hub established by the Provinces of Liège, Hainaut and Luxembourg (see below). Its aim is to encourage multi-modality and inter-operability, thereby increasing added value in the region.

The three missions of "Logistics in Wallonia" can be summarized as follows:

- to be a focal point for all players in the sector: carriers, logistics experts, infrastructure managers, training organizations;
- to breathe life into the Transport and Logistics competitiveness hub;
- to find and meet up with potential logistics investors.

This exploratory mission has been given by the AWEX-OFI (www.awex.be and www.investinwallonia.be).

Logistics in Wallonia has defined 3 areas of excellence:

- safety, security, prevention and environment;
- transport, distribution, storage;
- packaging.

Examples of projects supported by Logistics in Wallonia include:

- the development of a group of new track-and-trace solutions adapted to multi-modality;
- the development of a new voice interface for **integrated logistics management**;
- the implementation of integrated traceability management based on an e-logistics system;
- the development of an **electronic CMR** enabling process simplification and acceleration.

The priorities established by the Walloon cluster in technology areas and the directions taken in the selected projects are completely in line with European objectives.

For further information:
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Transport & Logistics Expert
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Tel: +32 81 33 28 78

LOCAL TRANSPORT & LOGISTICS HUBS

Wallonia intends to become a logistics hub par excellence. To gain further impetus and also address local issues, three local clusters have been defined, bringing together local transport and logistics players. They actively promote regional development in transport and logistics. These hubs were created within the framework of the Walloon government's Marshall Plan for large-scale economic recovery.

The "**Liège Transport & Logistics Hub**" is the umbrella for players from the Province of Liege. Its proximity to the Rhine-Meuse Euregio puts it in a position to contemplate interaction with Belgian and Dutch Limburg and North Rhine Westphalia in Germany.

c/o MET (Walloon Ministry of Amenities and Transport)

Pôle Transports Liège

Boulevard du Nord 8
5000 Namur
Tel: +32 81 773 092
Fax: +32 81 773 822
info@liege4logistics.com
www.liege4logistics.be





The "**Luxembourg Transport & Logistics Hub**" evolved from the Logistics Club of the two Luxembourgs (Club des Logisticiens des Deux Luxembourg). It is clearly focused on the SAAR-LOR-LUX region consisting of Belgian, French (Lorraine) and German (Saar) regions and the Grand Duchy of Luxembourg.

Drève de l'Arc-en-Ciel 98
6700 Arlon
Tel: +32 63 23 18 42
Fax: +32 63 23 18 95
Ludovic.waha@idelux-aive.be

The "**Hainaut Transport and Logistics Hub**" brings Hainaut companies together. Its geographic location allows it to consider collaboration with northern France.

Hainaut Development

Parc scientifique Initialis
Boulevard Initialis 22
7000 Mons
Tel: +32 65 34 26 14
damien.strebelle@hainaut.be
<http://www.hainaut-developpement.be>



This hub is the Hainaut's platform of the 'Logistics in Wallonia' hub which aim is to manage traffic congestion, improve safety and guarantee an efficient "back office" to the coastal "front-office" running from Rotterdam to Dunkirk.

3.2.2. ON A PRACTICAL LEVEL

3.2.2.1. A REMINDER OF WALLONIA'S ASSETS

Besides Liège Logistics, Wallonia has the following assets:

- Europe's 8th biggest freight airport,
- Europe's 3rd biggest river port,
- several multi-modal platforms,
- an uncongested motorway network,
- a dense rail network,
- 130 fully equipped Business Parks hosting close to 5,000 companies and creating more than 150,000 jobs,
- 6 Science Parks, directly connected to research centres, laboratories, universities,
- more than 4,000 hectares fully equipped and immediately available at the lowest price in Europe,

- expertise and skills thanks to the numerous training centres, schools and universities,
- highly skilled labour force.

In the last few years, Wallonia has attracted numerous Belgian and foreign investments in the transport and logistics sector. These have helped strengthen Wallonia's attractive image both in Belgium and abroad. From 2000 to 2006, Wallonia drew 543 investors, who have invested € 4.5 billion and created a total of 11,370 new jobs. The main investment areas are pharmaceuticals (18.19% of total investment), chemicals (17.99%) and energy 12.67%, followed by logistics (11.29%).

The following foreign companies have chosen Wallonia as a base for their European distribution centres:

Ami Metals, Asahi Glass, Bridgestone, CAL, Caterpillar, De Rooy, DPF, Essers, Farnell in one, Ferrero, Galliker, Glaxo Smith Kline, Beecham, Johnson & Johnson, Katoen Natie, Kintetsu World Experss, l'Oréal, Lyeco, PFS, Web, Skechers, Staples, TNT Airways and European Hub, UPS, Vos Logistics, etc

3.2.2.2. THE PROPERTY MARKET

On a total of 1,300,000 m² development projects in Belgium, some 700,000 m² are on Walloon territory.

Insufficient warehousing space in Wallonia has led to an increased demand of new construction. Site sales rose sharply in 2006 with local authority associations selling 130 hectares. With its unused former industrial sites, Wallonia has great potential for "brown field" redevelopment, converting land into semi-industrial use. Because of the time lapse involved in redevelopment, private-public partnerships are seen as one way of accelerating the process.

Table 16: Recent major property transactions

Rexel	10,000m ²	Purchase
Logitoys	12,000m ²	Construction
Pharma Belgium	6,000m ²	Rental
Johnson & Johnson	20,000m ²	Construction
Centre tri Postal	20,000m ²	Construction
Imprimerie Rossel	6,000m ²	Construction
PPL+	6,500m ²	Purchase
Trilogis	46,000m ²	Project sale
Scott USA	20,000m ²	Purchase

Source: DTZ Belux



On the local front, it is the inter-municipal associations who form the link in the chain that takes charge of economic development. They manage trade and industrial parks, and are partners not just in development but also in financing. Their tasks include finding the most appropriate sites, providing all necessary information regarding public subsidies, helping companies find qualified workers, etc.

Hereafter a list of local government associations responsible for economic development:

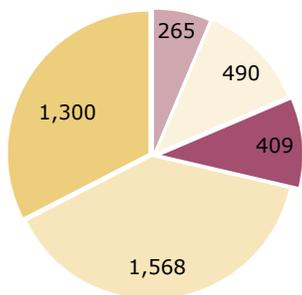
- IBW (Brabant wallon)
- IEG (Mouscron-Comines)
- IDEA (Mons)
- IDETA (Tournai-Ath)
- IGRETEC (Charleroi)
- IDELUX (Belgian Luxembourg)
- BEPN (Province of Namur)
- SPI+ (Province of Liège)

3.2.2.3. SIZE AND IMPORTANCE

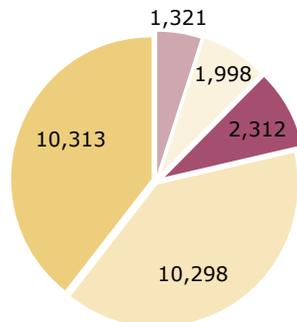
The size and importance of the transport and logistics sector for Wallonia can be illustrated by the following figures: the sector accounts for more than 4,000 companies with more than 26,000 employees. **It generates total annual turnover of around € 3 billion and added value exceeding € 1 billion.**

In the following diagrams, the above mentioned results are split up province by province (<http://clusters.wallonie.be/>)

4.032 companies in the T&L sector in Wallonia

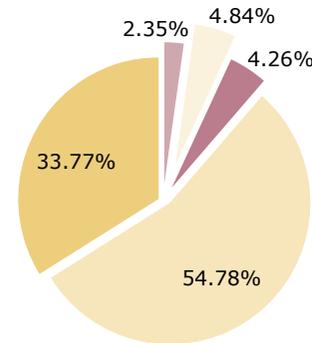


26.242 employees in these companies

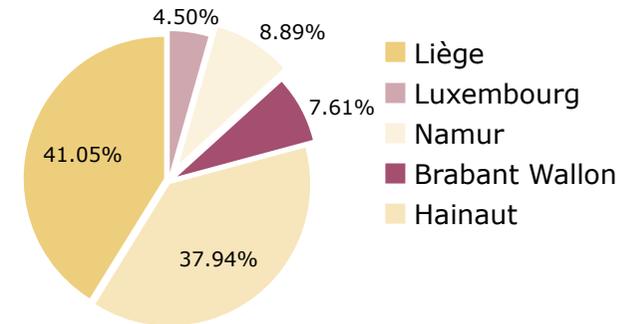


- Liège
- Luxembourg
- Namur
- Brabant Wallon
- Hainaut

Annual turnover of around 3 billion euro



Over EUR 1.1 billion of added value



More details on Wallonia-based transport and logistics services are available on the CD-Rom published by the Walloon Export and Foreign Investment Agency (www.awex.be) titled "Transport and logistics services and equipment in the Wallonia Region of Belgium"

This CD-Rom provides a general presentation of the sector followed by an alphabetical list of Walloon companies operating in this area. It can also be used to select the most suitable company for the transport of a particular product.

The same CD-Rom also includes an analysis of "New Mobility services and equipment in the Wallonia Region of Belgium".

3.2.2.4. CONCRETE PROJECTS

In March 2007 the cluster's pilot project - **TransLogisTIC** - was officially launched.



This ambitious research project financed by the Walloon Government is based on a long-term strategy of developing comprehensive multi-modal transport and high-quality value-adding logistics in Wallonia. It focuses on current findings identifying the lack of real-time monitoring of logistics flows along the whole chain and hierarchy as one of the most pressing points in guaranteeing high-performance integrated logistics.



In concrete terms, TransLogisTIC intends to build upon the European freight corridors favouring multi-modal transport agreed on at a European level. One such corridor – the Eurocorridor C (Antwerp – Basle – Lyon) will actually cross Wallonia.

Among the objectives, we would like to highlight:

- the development of command-and-control systems adapted to the demands of rail freight;
- the implementation of innovative systems for end-to-end real-time tracking;
- the development of a web-based logistics platform and new logistics services optimizing data exchange.

R&D is focused on a bottom-up overall systems approach guided by users' requirements and top-down system integration.

Project duration is 30 months (24 months R&D, 6 months of pilot testing). Around 60 people will be involved.

The consortium has the following members:

Coordinating company: Alstom Belgium SA

Major companies: Thales Alenia Space ETCA, Cherokee Europe, Trasys

PME and its spin-off: Logiplus, CE+T, n-Side, Sodiplan, IT-Optics, ACIC

Universities and research centres: ULB, UCL, FPMs Ulg, Multitel, FUCAM, MUWAC;

Infrastructure managers, shippers, carriers, potential users.

3.2.2.5. LOGISTICS CENTRES IN WALLONIA

Wallonia has a number of multi-modal logistics parks. The main ones - Liège, Charleroi, Centre Ardenne, the Athus terminal, Garocentre and the Dry Port Mouscron Lille - are displayed on the map below.



Source: Cluster Transport and Logistics

The publication Set up your Logistics in Wallonia 2007 (Warehouse & Logistics – special edition) provides more details on these centres:

- Autonomous Port of Liège
- Liège Airport
- Athus- PED (European Development Cluster)
- La Martinoire / Dry Port Mouscron - Lille international
- Tournai West II
- Charleroi Dry Port
- Garocentre - La Louvière
- Villers-le-Bouillet
- Liège Logistics / Grâce- Hologne
- Hauts-Sarts /Milmort
- Eupen / Welkenraedt
- Ardenne Logistics
- Bastogne II

Liège Triligiport, the Port of Liège's future multi-modal platform, must also be mentioned:

As the name indicates, Liège Triligiport has three major assets:

- connections to three sea ports (Antwerp, Rotterdam and Dunkirk);
- three means of transport (water, rail and road);
- three European cross-border markets (France, Germany and the Netherlands).

Its principal objective will be to attract inland waterway companies and major European distribution centres with a high value-adding content and capable of generating a large number of new jobs.

Liège Triligiport will be entirely devoted to logistics. A 15 hectare container terminal is to be added to the existing 1,850 meters of berths alongside the Albert Canal and the 350 meters supplementary dock basin. Its special container handling facilities will enable containers to be transferred from water to road, water to rail or water to storage. Sites for companies wishing to profit from the terminal's logistics and multi-modal advantages will be reserved in a belt around the new terminal.



Liège Trilogiport	Approximate surface
Container terminal (including the zone reserved for railway sidings)	15 ha
Non-terminal waterside sites, reserved for companies using waterway transport.	14.7 ha
"Behind terminal" sites with direct rail links suitable for companies with lesser waterway requirements.	12.7 ha
Non-waterway sites suitable for European distribution centres	29 ha
Public zone (quay, roads,)	10.2 ha
Service zone	1.8 ha
Total amount available for commercial use	Approx. 83 ha
Retaining basin	1.8 ha
Environmental buffer zone with an area of approx.	25 ha

Source: Autonomous Port of Liège

Thanks to this important project, the Port of Liège will be able to attract new companies and fully promote the increase in its river traffic, while at the same time ensuring sustainable economic development in the Liège region. Liège Trilogiport, as a real "logistics village", is one of Liège's first economic reconversion projects.

Cost estimates for fitting out this multi-modal platform (roads, rail-track, container terminal, equipment, isolation zone, parking, reception building, greenery, etc) run at € 29,150,000 (ex VAT).

One of many examples: the Logistics Platform at Courcelles

This platform:

- is ideally located between the Wallonia motorway (E42) and the motorway to Brussels and Antwerp (A54-E19)
- is near to two freight airports: Zaventem (where DHL is based) and Bierseet (TNT)
- has major European capitals within a five hour journey
- is in the middle of the Paris - Amsterdam - Frankfurt range

Surface area:

Total: 100 ha
Available: 40 ha
Extension is projected

Access:

Motorway: E42

General typology:

Access: Road
Nearest multi-modal platform: Charleroi Dry Port 18 km

Site facilities:

Fibre optics: Yes
ADSL: Yes
Mains: High voltage

For more information:

IGRETEC

Management: IGRETEC

Tel: +32 71 20 28 11

Fax: +32 71 33 42 36

info@igretec.com

www.igretec.com



The American pharmaceutical company Johnson & Johnson (2004 turnover of \$ 47.3 billion) wants to centralize the handling of its subsidiaries' products at Courcelles: J&J Cordis (cardio-vascular treatment), DePuy (orthopedics), Ethicon EndoSurgery (surgery) and Ethicon (sutures, cardio-vascular surgery, female health).

J&J's aim is to streamline its European distribution network with its present 46 centres. Like its competitors, J&J would like to start implementing an integrated strategy with European-wide working practices. In this context, the 80,000 m² Courcelles centre (33.000 m² covered space) will handle nearly 70% of Johnson & Johnson sales – running to several billion. This policy will naturally affect the group's other distribution centres.



3.3. BRUSSELS-CAPITAL

It would be impossible to draw an economic map of the Brussels Region without underlining the importance of the tertiary sector which accounts for the major share of employment. This makes Brussels Belgium's premium service centre. Thanks to its geographical position, Brussels is also an excellent crossroads for international commerce and the base of a number of major international white-collar companies.

The Cushman & Wakefield list mentioning the most interesting regions from a logistics point of view ranks the Brussels Capital Region in 7th place behind eastern France but in front of North Rhine Westphalia. Brussels has a number of undeniable assets thanks to its (still) affordable property market and also to its port which creates added value for the Region.

3.3.1. PROPERTY MARKET

Regarding the property market, it is to be noted that although the Brussels-Capital Region is only 162 km² in size, office rents at € 290 m²/year are far from reaching Paris (€ 790 m²/year) or London (€ 970 m²/year) levels. In addition the Brussels property market has a slightly higher availability rate (10.6%) than other European cities. In a comparison of 30 European cities, Brussels ranks 5th with regard to transport accessibility (2006 figures).

3.3.2. THE MASTERPLAN, A ROADMAP FOR THE PORT'S FUTURE

The Masterplan sketches the Port of Brussels' development up to 2015. Its implementation will help the Port to meet to the challenges of logistics and transport. The plan maps out the development and evolution of the port zone in Brussels, strengthening its role as a key player in Brussels' economy.

Port development in Brussels is justified not solely from an economic perspective. Without the port, the Brussels road network would have to absorb 200,000 extra trucks a year. By developing the port zone, especially as a multi-modal hub, Brussels can guarantee its inclusion in European communication networks and continue its modernization and evolution into a multi-modal logistics platform.

At present there are close to **350 companies** based or operating in the port zone. Together, they employ some **5,750 full-time staff** and generate **€ 569.1 million in added value**. Their upstream operations generate a further 7,700 jobs and € 539.6 million added value.

The strategy defined for the pre-port centres on the development of the multi-/inter-modal platform. With this in mind, the Port will search to attract logistics operations with high added-value content around the container terminal and the Carcoke site.

THE CARCOKE SITE

The Carcoke site alongside the canal will be converted into a logistics zone serving the capital's inner port. This project is intended to expand the Port's capacity by 500,000 tons per year, on top of the current 7.5 million tons of waterway traffic. The public authorities have appointed a private consortium to take charge of site development and operations. This presently consists of the port operator Katoen Natie (active in the Port of Antwerp) and the soil treatment company Envisan (belonging to the Jan De Nul group). Total cost is estimated at € 68 million.

THE VERGOTE ZONE

The Vergote zone is specialized in multi-modal metropolitan logistics with riverside operations along the basin and "dry" logistics operations in the **TIR centre** (and its future extension).

The project for extending the Brussels international road terminal (TIR Centre) is taking on concrete shape now that the Port of Brussels has brought shareholders together to form the company BILC (**Brussels International Logistics Centre**).

THE BILC PROJECT

The purpose of the BILC project is the construction of highly modern warehousing in the port zone. The BILC will occupy an 8.3 hectare site alongside the present TIR Centre. Some 45,000 m² of warehousing space will be developed. Part of the warehousing will be built by the BILC company, in which the Port holds a 50.1% share, the other 49.9% being held by the French company Sogaris. The investment will be mainly financed by a € 25 million loan from the EIB (European Investment Bank).

The BILC site offers great potential for logistics operations requiring relatively little space, as well as proximity to the geographic centre of the region. The site is focused in particular on regional distribution centres (RDC) which can



supply the regional/metropolitan market, offering added-value services such as storage, stock management, order-picking, assembly, packaging and shared information management. In addition, these regional distribution centres can serve as bundling/unbundling centres for different goods, thus optimizing distribution in the metropolitan region. The BILC also aims at complementing the present TIR centre, which is focused on smaller volumes and more specific markets, by bringing together greater logistics volumes.

Accompanying measures are being negotiated with the Region to concentrate HGV traffic on designated throughways and reduce transit traffic in highly populated areas. The Port has also decided to initiate a call for architectural projects on the urban integration of the future logistics centre.

This project should have taken concrete form by the end of 2007 and is expected to lead to the creation of 400 direct jobs, many of which will be for the unskilled or semi-skilled.

Ziegler is one of the **largest logistics service providers with offices in Brussels** near to the port. It won the Logistics Project of the Year 2007 Award. A short summary of its activities follows:

ZIEGLER

ZIEGLER - MULTI-MODAL LOGISTICS OPERATOR

Rue Dieudonné Lefèvre 160

1020 Brussels

Tel: +32 2 422 22 99

Fax: +32 2 422 21 04

www.zieglergroup.com



With a network of 4,000 partners, 200 locations, 900,000m² of storage space and a 2006 billing volume of € 1.508 billion, the Ziegler Group is a European leader in organizing multi-modal transport (road, air, sea) and logistics.

Outside the Benelux, the group has expanded into France, Switzerland, Germany, Great Britain, Ireland and Morocco. In addition to its bases in these countries, Ziegler also operates a powerful network of exclusive agents who bring the group's know-how to all four corners of the world,

Its alliance with complementary service providers is the Ziegler Group's major strength. It uses this alliance to offer a comprehensive programme of services covering the whole logistics chain.

Ziegler is a full European company and is based in Brussels, the capital of Europe, where all strategic decisions are taken.

In 2007 Ziegler won the **Logistics Project of the Year 2007 Award** with its logistics project "2 wheels", a European-wide motorcycle inventory and distribution management project.

Another logistics company operating in Brussels is:

Havelange Forklifts

Avenue de Vilvorde 296

1130 Brussels

Tel: +32 2 241 65 50

Fax: +32 2 241 53 27

www.havelangeforklifts.be



In 2005, Havelange was selected by the TCM Tokyo headquarters as its "European Stock Center" or European logistics platform.

Since then, Havelange has been managing European forklift stocks on behalf of TCM Europe, which is responsible for fitting accessories and other options to forklift trucks and preparing them for customer shipment.

Havelange Forklifts is also a partner in the Manpower Logistics Academy, a logistics training centre based in the Port of Brussels and aimed at providing a greater flow of personnel skilled in critical logistics functions.



IV Publications

4.1. SPECIALIZED JOURNALS

4.1.1. BUSINESS LOGISTICS

Koning Albert I-laan 162
8200 Bruges
Tel: +32 50 40 80 80
Fax: +32 50 40 80 90
www.businesslogistics.com



Magazine focused on flow management (goods, information and costs), appearing monthly (except in July and August).

It counts four sections:

- strategy & management;
- inbound Logistics;
- outbound Logistics;
- information & Communication Technology.

The Business Logistics editorial board also publishes a number of dossiers and special reports in addition to the traditional monthly articles. Certain special reports cover important exhibitions. Others aim at supplying additional details for specific topics.

4.1.2. MMM BUSINESS MEDIA

Complexe Arrobas
Parc Artisanal 11-13
4671 Blégny-Barchon
Tel: +32 4 387 87 87
Fax: +32 4 387 90 87
www.mmm-businessmedia.com



MMM Business Media is the specialist in business-to-business communication in three areas: road transport and logistics, vehicle fleets and commercial property.

- Warehouse & Logistics
 - Purchasing guide for logistics
 - TOP 250 in warehousing

Warehouse & Logistics awards the Logistics Project of the Year to a commercial or industrial company, a logistics service provider or a two-partner association.

The September/October 2006 edition is particularly important as it contains the TOP 250 warehousing ranking.

4.1.3. LOGISTIQUES MAGAZINE

1, rue Eugène et Armand Peugeot
92856 Rueil-Malmaison cedex
France
www.assiseslogistique.com



Monthly magazine on logistics within companies (current news, thematic dossiers).

Reliable, essential-reading details on all logistics operations. The monthly Logistiques Magazine is the only magazine covering news right along the logistics chain:

Purchasing, procurement, storage, distribution, etc.

The sections in Logistiques Magazine speak for themselves:

- News: sector information: zoom-in on companies, service providers, equipment, new companies, supply-chain news...
- Events: the logistics event of the month: new technologies, evolution of IT systems, etc.

- Strategies and solutions: the company of the month (zoom in on an industrial company with details of its logistics processes), IT systems, partnerships, production, trends, etc.
- Dossier of the month: presentation of a detailed thematic dossier: Supply Chain Management, EDI, messaging, etc.
- Practical guide: monthly warehousing overview (new storage areas) and focus on new products; quarterly Fedimag indices (cost prices for handling materials, labour, special equipment, etc).
- Careers - Training: presentation of schools offering courses in logistics techniques and interviews with former students.
- Classified advertisements

4.1.4. LOGISTICS MANAGEMENT

TransportMedia

Automotive Media Centre
 Z.1.Researchpark 20
 1731 Zellik
 Tel: +32 2 467 61 60
 Fax: +32 2 467 61 62
 info@transportmedia.be
www.transportmedia.be



In addition to **Logistics Management** (the logistics decision-makers' magazine) and **Van Management** (the magazine for light commercial vehicles), TransportMedia also publishes "**Transport Management**", a journal also qualifying as a decision-makers' magazine and which provides a comprehensive look at the transport world, including logistics. Already in its 9th year, it is published six times a year.



4.1.5. O.T.M.NEWS

OTM News is the quarterly magazine of the Belgian Shippers' Council, a logistics skill centre (see OTM – trade federations). It already exists for 7 years.

For additional information:

OTM vzw

Martelaarslaan 49
 9000 Ghent

Tel: +32 9 265 18 81

Fax: +32 9 266 14 41

info@otmbe.org

www.otmbe.org

4.2. WEBSITES

www.nieuwsbladtransport.nl

<http://logistiek.2link.be/>

<http://logistiek.start.be/>

www.lejournaldelalogistique.com

www.lognews.info/

<http://supplychainmagazine.fr/index.html>

V Exhibitions and forums

5.1. EUROLOG



EUROLOG 2008

DLK 2008, 25. Deutscher Logistik-Kongress - XXV^e German Logistics Conference

Event Date:
22-24 October 2008

Place:
Berlin (Germany - Europe)

Organizer:
BVL, Federal Logistics Association (Bundesvereinigung Logistik e.V.) ELA, European Logistics Association

5.2. PROLOGISTICS



PROLOGISTICS 2008

Theme:
Event dedicated to Professionals in the Supply Chain Industry

Event Date:
Sept. 25 - 26, 2008

Place:
Brussels (Belgium - Europe)

Venue:



Brussels Expo

Brussels Exhibition Centre
Place de Belgique
1020 Brussels
Belgium
Tel: +32 2 474 82 63
Fax: +32 2 474 83 97
info@bruexpo.be
www.brusselsexpo.be

Organizers:



easyFairs

Bldv Louis Schmidtlaan 97
1040 Brussels
Belgium

Mr Wim Desloovere

Exhibition Manager
Tel: +32 3 280 53 17
Fax: +32 3 280 53 53
transport-be@easyfairs.com
www.easyfairs.com

5.3. SUPPLY CHAIN WORLD

Supply Chain World



SUPPLY CHAIN WORLD 2008

Theme:

Supply Chain World is the number 1 meeting place for professionals managing flows of information, goods and cost

Event Date:

19-20 March 2008

Place:

Brussels (Belgium - Europe)

Venue:



Brussels Expo

Brussels Exhibition Centre
Place de Belgique
1020 Brussels
Belgium
Tel: +32 2 474 82 63
Fax: +32 2 474 83 97
info@bruexpo.be
www.brusselexpo.be
Contact: Ms. Christine Devisscher

Organizers:

Media Access

Koning Albert I-Laan 162
8200 Bruges
Belgium
Tel: +32 3 50 40 80 80
Fax: +32 3 50 40 80 90
info@businesslogistics.com
www.businesslogistics.com
Contact: Ms. Ria Van der Borght

5.4. SITL



INTERNATIONAL EXHIBITION OF LOGISTICS SOLUTIONS (SITL)

Event Date:

11-14 March 2008

Place:

Paris - Nord Villepinte, Hall 5 (France - Europe)

www.salon-sitl.com

5.5. TRANSPORT LOGISTICS EXHIBITION



TRANSPORT LOGISTICS EXHIBITION

Theme:

International exhibition for logistics, telematics and transport

Event Date:

12 -15 May 2008

Place:

Munich (Germany - Europe)

Venue:

New Munich Trade Fair Centre

Further information:

1400 exhibitors
86,000m²

www.transportlogistic.de

More than 40 Belgian logistics companies (11 from Wallonia) took part in the 2007 exhibition in Munich. The objective was to present the potential of southern Belgium. The Walloon Export and Foreign Investment Agency (Awex-OFI), in association with the Transport and Logistics Competitiveness Hub, invested in a 120m² stand, in which the following 11 Walloon companies exhibited their products:

Cogitech - Essers - Michel Logistics - Mondia - Tyres Logistics International - Alstom Belgium Transport - Voice-Insight Wallonie - Port autonome de Liège - Terminal Container Athus - Jean Heck - Jost Logistics.

5.6. TRANSPORT & LOGISTICS



TRANSPORT & LOGISTICS 2009

Theme:
Event dedicated to Professionals in the Supply Chain Industry

Event Date:
20-22 October 2009

Place:
Brussels (Belgium - Europe)

Venue:



Antwerp Expo

Organizers:



easyFairs
Blvd Louis Schmidtlaan 97
1040 Brussels
Belgium

Mr Wim Desloovere
Exhibition Manager
Tel: +32 3 280 53 17
Fax: +32 3 280 53 53
transport-be@easyfairs.com
www.easyfairs.com

All areas of transport and logistics were represented at this exhibition – from traditional multi-modal transport to state-of-the-art automated systems for goods flow. Logistics service providers, handling equipment suppliers, systems integrators, consultants and solution providers were all there exhibiting their products, systems, IT solutions and services. Distribution, industry, supply chain and logistics experts came in large numbers, looking for the ideal partner to help increase the profitability and productivity of their industrial processes.

5.7. PETROCHEM LOGISTICS



PETROCHEM LOGISTICS 2008

Theme:
International Conference and Exhibition for Oil and Chemicals Transportation

Event Date:
March 2008

Place:
Antwerp (Belgium - Europe)

Venue:



Antwerp Expo

Jan Van Rijswijcklaan 191
2020 Antwerp
Tel: +32 3 237 28 90
Fax: +32 3 237 87 71
contactweb@antwerpexpo.be
www.mexicocentres.be

Organizers:



Stocexpo Ltd.

Marshall House
124 Middleton Road
Morden, Surrey, SM4 6RW
United Kingdom
Tel: +44 20 8687 4160
Fax: +44 20 8687 4130
info@stocexpo.com
www.stocexpo.com

More information:
www.petrochem-logistics.com

5.8. FORUM



FASTLOG BELGIUM 2008

Theme:

Annual conferences - exhibition - for partners from the transport and logistics sector

Event Date:

16 April 2008

Place:

Charleroi (Belgium - Europe)

Venue:



Organizers:

Charleroi Expo

6041 Charleroi
Belgium

Tel: +32 71 20 99 65

Fax: +32 71 20 99 99

charleroiexpo@charleroiexpo.be

www.charleroiexpo.be

More information:

bpays@charleroiexpo.be

www.fastlog.be

VI Practical Information

6.1. TRADE FEDERATIONS

6.1.1. ABCAL

ABCAL ASBL

C/o Union wallonne des Entreprises
Chemin du Stockoy 1-3
1300 Wavre
Tel: +32 81 746 781
Fax: +32 81 746 782
abcal@skynet.be
www.abcal.orgz



ABCAL is the Belgian Association of Purchasing and Logistics Managers. Founded in 1958, it brings together men and women who are responsible for purchasing, logistics, supply chain and related functions. ABCAL organizes training and information sessions, in which members can pool their professional know-how and benefit from an exchange of ideas.

ABCAL has the exclusive right to represent the **purchasing and logistics functions** on an international level. For purchasing, this is exercised in connection with the IFPMM (International Federation of Purchasing and Materials Management), for logistics with the ELA (European Logistic Association).

6.1.2. BELOTRA

Belgian Trade Association for Logistics, Transport and Freight Companies.
(Union Professionnelle Belge des Entreprises de Logistique, de Transport et d'Affrètement / Belgische Beroepsvereniging van Logistiek-, Vervoer en Baan bevrachtingsondernemingen)

BELOTRA is the logistics branch of FEBETRA.

6.1.3. BELTOP

Belgian Transport Operators - former "Chambre syndicale de Transport de Bruxelles"

Avenue du Port 104-106
1000 BRUSSELS
Tel: +32 2 426 20 46
Fax: +32 2 426 25 19
beltop@skynet.be

The BELTOP trade association consists mainly of customs agents. However it is open to logistics operators involved in the repackaging and redistribution of goods arriving in Brussels.

6.1.4. CONFEDERATION OF BELGIAN FREIGHT FORWARDERS

CEB/VEA

Brouwersvliet 33 B1
2000 Antwerp
Tel: +32 3 233 67 86
Fax: +32 3 231 82 02
ceb@vea-ceb.be
www.vea-ceb.be



The CEB/VEA was founded in its present form in 1982. It is the national umbrella organization of freight forwarders and custom agents in Belgium, which means that members of CEB are the regional associations of freight forwarders and custom agents:

- ADESO: The Association of Freight Forwarders and Customs Agents in West and South Belgium (Union des Expéditeurs et Agents en Douane de l'Ouest et du Sud de la Belgique) (Vereniging der Expeditie en Douane-Agenten van West- en Zuid België).
- U E A: Antwerp Freight Forwarding, Logistic and Works' Agents Association (Union des Expéditeurs, Logistique et Agents d'Usines d'Anvers) (Vereniging voor Expeditie, Logistiek en Goederenbelangen van Antwerpen).

- BAFI: Belgian Airfreight Institute.
- BELOTRA: Belgian Trade Association for Logistics, Transport and Freight Companies (Union Professionnelle Belge des Entreprises de Logistique, de Transport et d'Affrètement)(Belgische Beroepsvereniging van Logistiek-, Vervoer en Baanbevrachtingsondernemingen).
- BELTOP: Belgian Transport Operators.

340 companies are member of CEB via their membership of a regional organization.

6.1.5. ELA

ELA

Kunstlaan 19 Avenue des Arts
1210 Brussels
Tel: +32 2 230 02 11
Fax: +32 2 230 81 23
ela@elalog.org
www.elalog.org



The European Logistics Association is the umbrella organization for 25 national organizations in Europe. The ELA was founded in 1984 in order to support and coordinate the activities of the national organizations. Its activities are focused on education and professional certification. It is the recognized European institution for players in the logistics market and supply chain operators and acts as their European spokesman on a global level. Via its member associations, it has contact with more than 50,000 logistics companies throughout Europe.

Its main goal consists in offering a forum for the exchange of ideas between individuals and associations that it represents.

Belgian members:



ABCAL (see above)
Tel: +32 10 475 359
Fax: +32 10 455 180



VIB
Guido Lamote
Tel: +32 3 286 80 90
Fax: +32 3 286 80 98

VIB Centrale Administratie

Filip Williotstraat 9
2600 Berchem
Tel: +32 3 286 80 90
Fax: +32 3 286 80 98
vib@bevib.be

In 1996 the ELA created the **European Certification Board of Logistics (ECBL)** as an independent organization. Each participating country has a National Certification Board which appoints country's assessors who award the ECBL certificates. The aim is to maintain professional standards and ensure constant assessment quality throughout Europe.

6.1.6. FEDERATION OF ENTERPRISES IN BELGIUM

FEB

Rue Ravenstein 4
1000 Brussels
Tel: +32 2 515 08 11
Fax: +32 2 515 09 99
info@vbo-feb.be
www.feb.be



SERVICE TÉLÉCOMMUNICATIONS ET TRANSPORTS

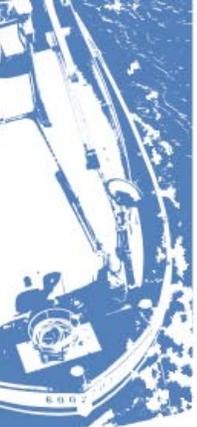
Tel: +32 2 515 08 49
Fax: +32 2 515 08 32
cma@vbo-feb.be
www.vbo-feb.be

The Federation of Enterprises in Belgium (FEB/VBO) is the only multi-sector employers' organization representing companies in all three regions of Belgium. Its members are the country's main **Sectoral Federations**, representing companies operating in the key industrial and service sectors.

FEB has 33 full members, all of which are professional sectoral federations, as well as a number of associated and corresponding members. All in all, it represents more than **30,000 businesses**, of which **25,000 are SMEs**.

In terms of jobs, FEB represents approximately **1.5 million workers** in the private sector.

FEB represents companies in nearly **150 national, European and international bodies**.

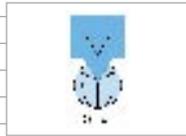


Within the FEB, the "telecommunications and transport" department keeps track of developments in the transport and logistics sector. To assist its members, it has created – in collaboration with FEBIAC and the SNCB/NMBS-Holding – a consultation platform to better understand mobility problems in Belgium. Three **Rail meets Road** symposia have already been held. These initiatives are always a big success with both politicians and economists.

6.1.7. ORGANIZATION OF TRAFFIC MANAGERS

OTM - Organization of Traffic Managers Association Belge de Chargeurs Multimodaux - Belgian Shippers' Council

Building Lieven Bauwens
Martelaarslaan 49
9000 Ghent
Tel: +32 9 265 18 81
Fax: +32 9 266 14 41
info@otmb.org
www.otmbe.org



Founded about twenty years ago in the Kortrijk region by some 15 people responsible for the transport needs in their different industrial companies, the OMT's initial aim was to create a forum for exchanging information and know-how, finding solutions to common problems and enhancing professional skills.

The name "Organization of Traffic Managers" was later changed to "the Belgian Organization of Multi-modal Shippers", to reflect the organization's widening spectrum of activities. These were no longer limited to transport problems, but gradually began to encompass the whole supply chain.

The OTM is now a recognized and respected organization of professional shippers in industrial logistics, whose objectives can be summed up as follows:

- to act as a logistics skills platform for its members;
- to serve as a talking partner for other logistics bodies;
- to defend shippers' interests.

6.1.8. BELGIAN SOCIETY FOR INTEGRATED LOGISTICS MANAGEMENT

PICS Belgium

Filip Williotstraat 9
2600 Berchem
Tel: +32 3 286 80 91
Fax: +32 3 280 46 01
info@picsbelgium.be
www.picsbelgium.be



PICS "the **Belgian Society for Integrated Logistics Management**" is a professional association for logistics services. Founded in 1972, it is officially affiliated to its American sister association **APICS**.

The main aim is to offer the possibility to managers and executives, active in purchasing, supply management and distribution, to enhance their logistics knowledge and skills to become more successful professionals.

PICS publishes a number of specialist publications such as Business Logistics, APICS Magazine, APICS Conference Proceedings. Further information and services are available via their website.

PICS also collaborates with local associations such as the VIB and VIL. It offers training courses and seminars on supply chain management, production and distribution logistics, lean operations, etc.

6.1.9. FLEMISH LOGISTICS ASSOCIATION

Vlaams Logistiek Verbond - VLV

Jordaenskaai 25
2000 Antwerpen
Tel: +32 3 233 01 17
Fax: +32 3 225 19 87
Info-vlv@skynet.be
www.vlaamslogistiekverbond.be

The Flemish Logistics Association (VLV) represents the sector's interests vis-à-vis the authorities, other federations and the social partners and acts as well as a communication and meeting platform for its members.



The VLV was founded in 2004 and targets all third-party logistics operators in Flanders. It has at present 40 members, whose total storage space exceeds 8 million m² and who represent total investment of over € 3 billion. Members' total turnover in Flanders exceeds € 2 billion per annum, 90% of which is added value.

Certain estimates point to third-party logistics operators employing some 25,000 workers, 80% of whom work for VLV members.

6.1.10. PURCHASING AND LOGISTICS ASSOCIATION

Vereniging voor Inkoop en Bedrijfslogistiek - VIB

Filip Williotstraat 9
2600 Berchem
Tel: +32 3 286 80 90
Fax: +32 3 286 80 98
vib@bevib.be
www.bevib.be



See 6.1.5 ELA



6.2. STATE SUBSIDIES

In conjunction with the subsidy unit of the [ING bank](#), the [IBOT](#) has drawn up a list of support measures available to logistics companies from different sources. These subsidies are granted for social, ecological, financial or economic purposes. It should however always be remembered that these subsidies (whether federal, regional or provincial) are often only available temporarily.

Moreover, any applicant must obtain information on possible support **before starting the intended project**. In most cases a retro-active application is not admissible.

Hereafter the table drawn up by the IBOT.

6.2.1. REGIONAL AID

Very detailed information on regional subsidies is available on the SPF Economy website (www.mineco.fgov.be). Information is available on such subjects as:

- regional aid for economic expansion and new jobs;
- aid for foreigners investing in Belgium;
- tax cuts;
- help in financing;
- provincial aid;
- EU subsidies.

6.2.1.1. RELATING TO LOCATION

Following are the regional sites providing further information.

Choose the region in which the project is to be implemented or compare each region's offerings before selecting the region where you want to implement your project.

1. Flanders	2. Brussels-Capital	3. Wallonia
		

1.

FIT - Flanders Investment & Trade

www.flandersinvestmentandtrade.be

See in particular the "doing business - incentives - investment incentives" section.

VLAO - Flanders Enterprise

Koloniënstraat 56
1000 Brussels
Tel: +32 2 227 60 20
Fax: +32 2 227 60 11
info@vlao.be
www.vlao.be



Another interesting website is www.gom.be, but this site might be modified in the near future.

2.

www.brussel.irisnet.be

3.

www.wallonie.be

6.2.1.2. RELATING TO THE OBJECTIVE

The following table lists a selection of regional subsidies:

	Flanders	Brussels-Capital	Wallonia
Management and Innovation	 www.iwt.be	 www.abe-bao.be	 recherche-technologie.wallonie.be
Consultancy and Training	vdab.be/opleidingen/ beaweb.be	 www.abe-bao.be	 leforem.be
Investment	 www.vlao.be	 www.primespme.be	 investinwallonia.be

Environment	 www.vlao.be	 www.ecosubsbru.be	 environnement.wallonie.be
Investment in export	 www.flandersinvestmentandtrade.be	 www.bruxelles-export.be	 www.awex.be.be
Financing	 www.fonds.org	 www.fonds.org	 www.fonds.org www.sowalfin.be
Guarantees	 www.pmv-kmo.be/	 www.fondsbruxellois-degarantie.be	 www.sowalfin.be
Risk capital and other state initiatives	 www.banvlaanderen.be www.pmv-kmo.be	 www.business-angels-connect.be	 www.business-angels-connect.be
Inland Waterways	 www.wenz.be/bedrijven/pps.html www.descheepvaart.be	Subsidies for developing regular container services on waterways Incentives for investment leading to an increase in waterway transport	



6.2.2. FEDERAL AID

6.2.2.1. TAX INCENTIVES

TAX CREDITS FOR SMEs

SMEs can receive a tax credit, based on equity growth.
finform.fgov.be

TAX DEDUCTIONS FOR INVESTMENT

Under certain circumstances, companies can offset their investments against taxable income.
www.fiscus.fgov.be



6.2.2.2. REDUCTION OF EMPLOYER'S CONTRIBUTIONS

ONSS - General instructions for employers

In addition to the (automatic) "structural" reduction of employer's contributions, an employer can also benefit from "target group reductions" – for hiring young workers, long-term unemployed, older workers, or for a reduction in working hours, first-time jobs or restructuring.
www.onssrsz.lss.fgov.be/onssrsz/index.htm



6.2.3. EUROPEAN AID

In addition to European aid coming from the Structural Funds (for example for agriculture) and distributed via regional agencies, the EU also offers a number of subsidies attached to different programmes. These are intended to subsidize R&D initiatives aimed at structural improvements. Initiatives must involve collaboration between two partners from EU Member States. This generally means that the subsidies do not go to individual companies but to coordinating or partnering agencies. Of all projects submitted, only the most interesting will be selected for subsidizing.

An overview of all European subsidies can be found via the following link.
europa.eu/pol/enter/index_en.htm
Specific programmes for the transport and logistics sector:

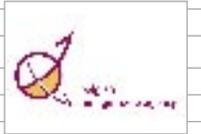
- Marco Polo: Promoting modal shift.
- Galileo: European satellite navigation system for monitoring / supporting transport.

For any remarks, suggestions or additional information, please contact:

Nadia Verlent

ACE – ABH - BFTA

Belgian Foreign Trade Agency
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1000 Brussels
Tel: +32 2 206 35 23
Fax: +32 2 203 18 12
nadia.verlent@abh-ace.org
www.abh-ace.org



AWEX

Wallonia Foreign Trade and Investment Agency
Place Saintelette 2
1080 Brussels
Tel: +32 2 421 82 11
Fax: +32 2 421 87 87
mail@awex.be
www.awex.be



Brussels Export

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1050 Brussels
Tel: +32 2 800 40 00
Fax: +32 2 800 40 01/02
infos@brussels-export.irisnet.be
www.brussels-export.irisnet.be



FIT

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1030 Brussels
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www.flandersinvestmentandtrade.be





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