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Buitenlandpromotie "Powered by Logistics"

Rotterdam, 1 april 2015



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NDL/HIDC: de organisatie

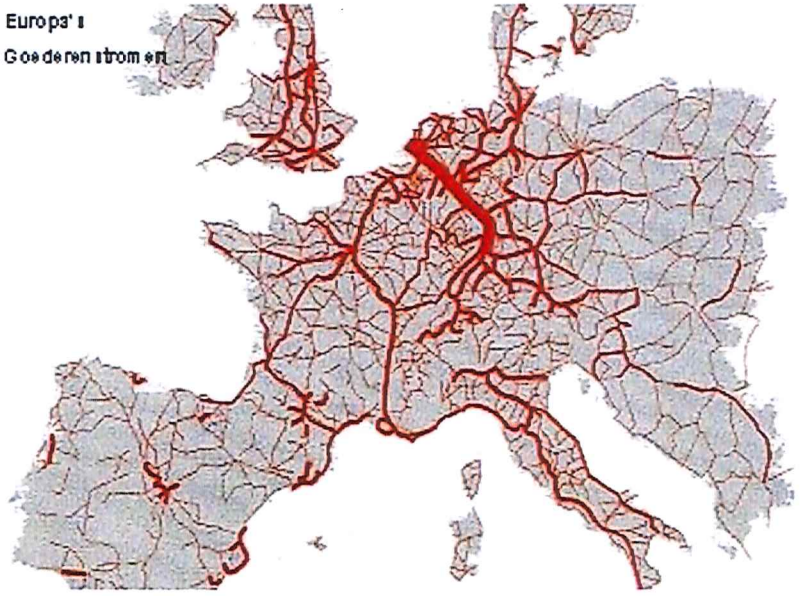
Nederland Distributieland (NDL/HIDC):

Private non-profit organisatie, vertegenwoordigt 300 leden (logistieke sector).
In 1987 opgericht door de Nederlandse logistieke sector.

Taak:

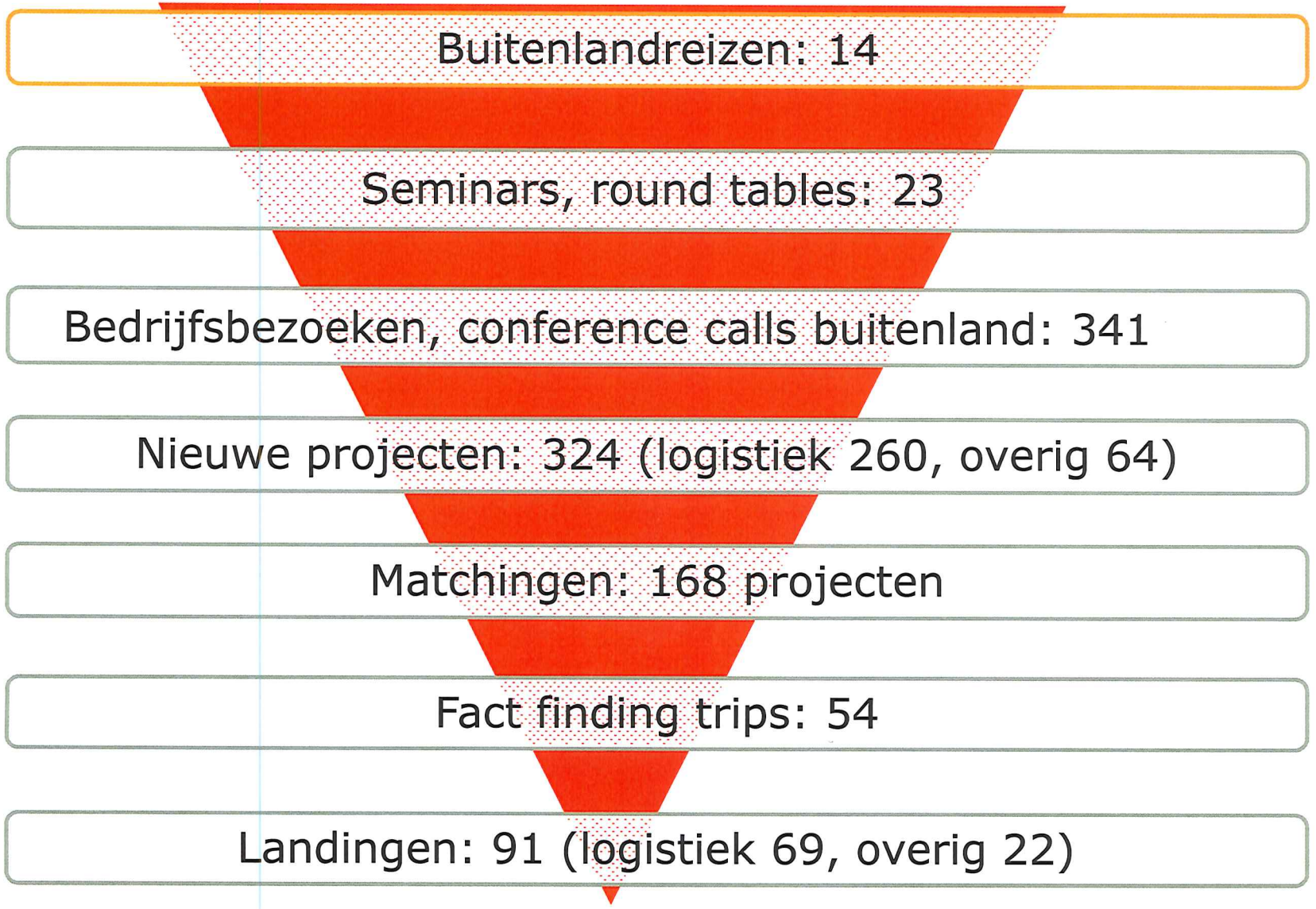
Het promoten van Nederland als 'Your logistics gateway to Europe' in het buitenland door het bieden van solide advies, praktische hulp en gerichte matchmaking.

Flow of goods in Europe



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Acquisitietrechter 2013 - 2014



Unique selling points ...

- ✓ Logistics is an enabler!

The Netherlands offers excellent conditions to develop the European market and create an effective European supply chain:

- ✓ Fiscal environment: fiscal representation, VAT deferment, bonded warehousing, trade facilitating authorities
- ✓ Location: proximity to your market
- ✓ Infrastructure: leading main ports and hinterland connections
- ✓ Workforce: flexible, highly skilled, multilingual
- ✓ Experience: long history in logistics
- ✓ Knowledge: well developed logistics industry
- ✓ Outsourced solutions: all relevant players are present in The Netherlands

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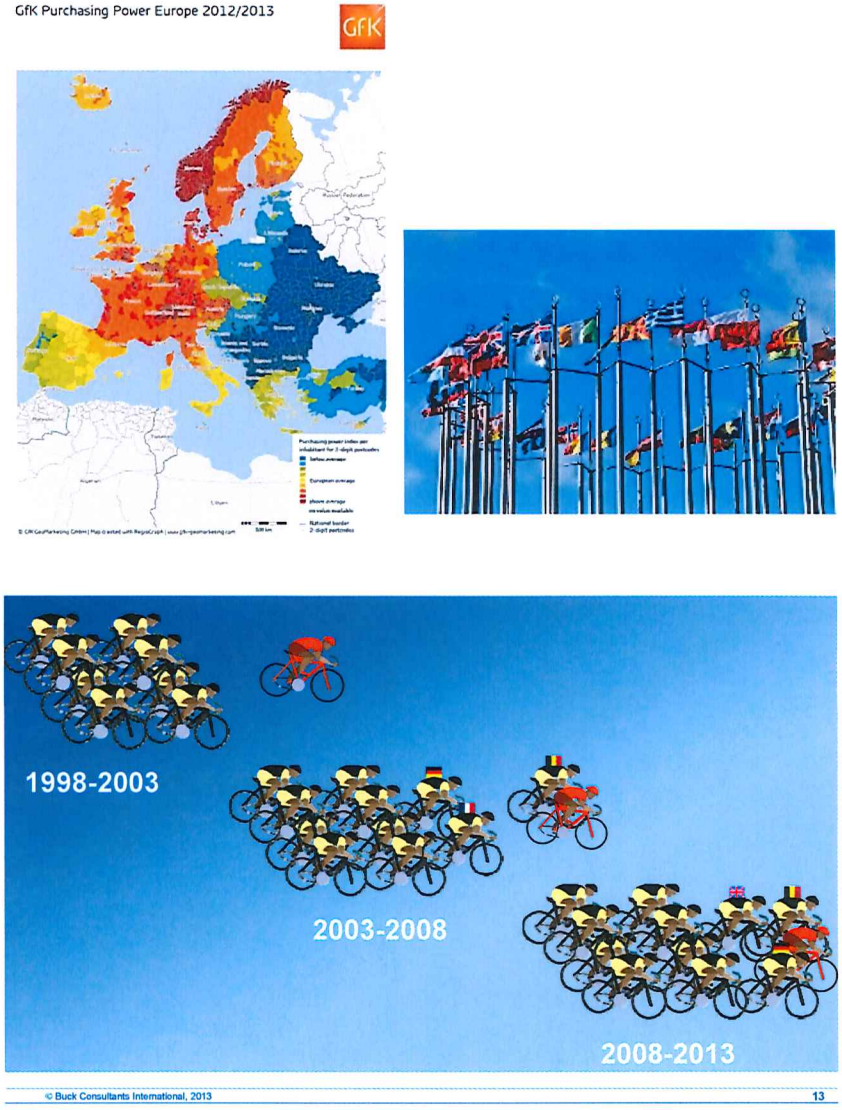
De wereld verandert

Kans of bedreiging?

- Veranderende eisen vanuit de klanten
- Toenemende concurrentie vanuit andere landen
- Koopkrachtontwikkeling in Oost-Europa
- Harmonisatie Europese regelgeving

Toppositie behouden

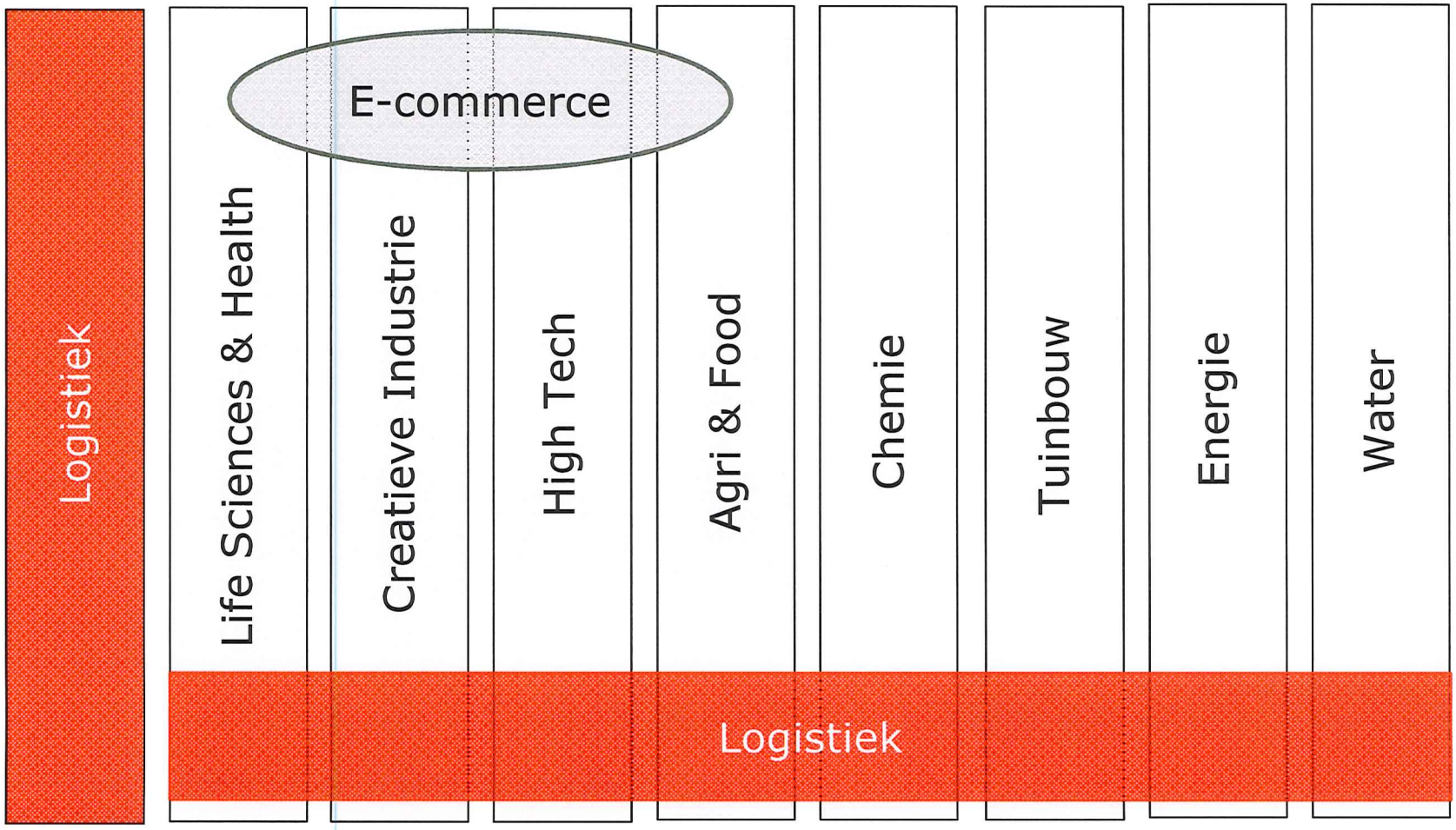
- Concurrerend vestigingsklimaat
- Concurrerende propositie
- Effectieve promotie en acquisitie



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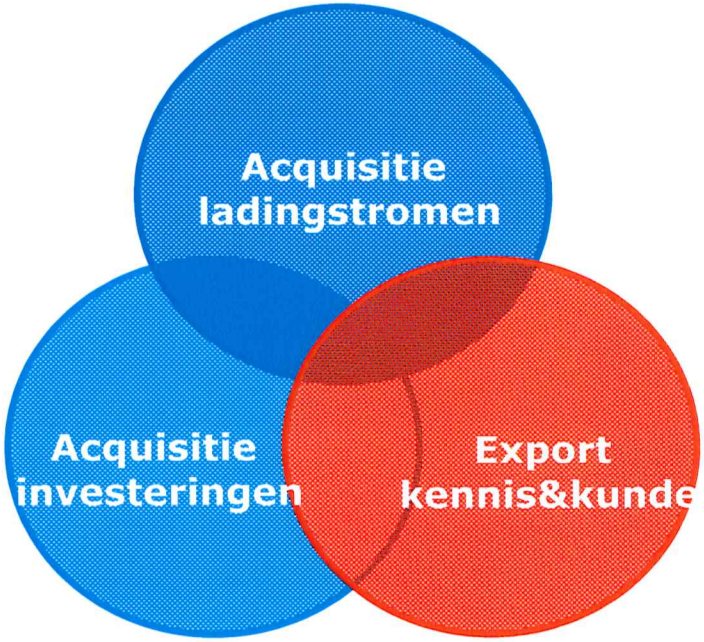
Topsectoren



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Uitgangspunten buitenlandpromotie

- Integrale aanpak
  - Investeringen
  - Ladingstromen
  - Kennisexport
- Sector- en themagericht
  - Relatie naar topsectoren
  - Logistieke thema's
- Cofinanciering
  - Vanuit bedrijfsleven
- Projectmatig
  - Meerjarige werkpakketten
- Logistieke Promotie Koffer
  - Service strategische reisagenda



Bron: Programma Buitenlandpromotie Logistiek 2014-2015

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"Logistieke Promotie Koffer"

Vraagbaak voor iedereen die logistiek promoot

- Heldere propositie Nederland Logistic Hub
- Proposities voor sectoren, regio's en thema's geleidelijk aanvullen
- Toegankelijk voor verschillende expertiseniveaus
- State-of-the-art applicatie
- Gebruik maken van bestaande informatie bij NDL/HIDC, Dinalog, mainports, regio's, partners

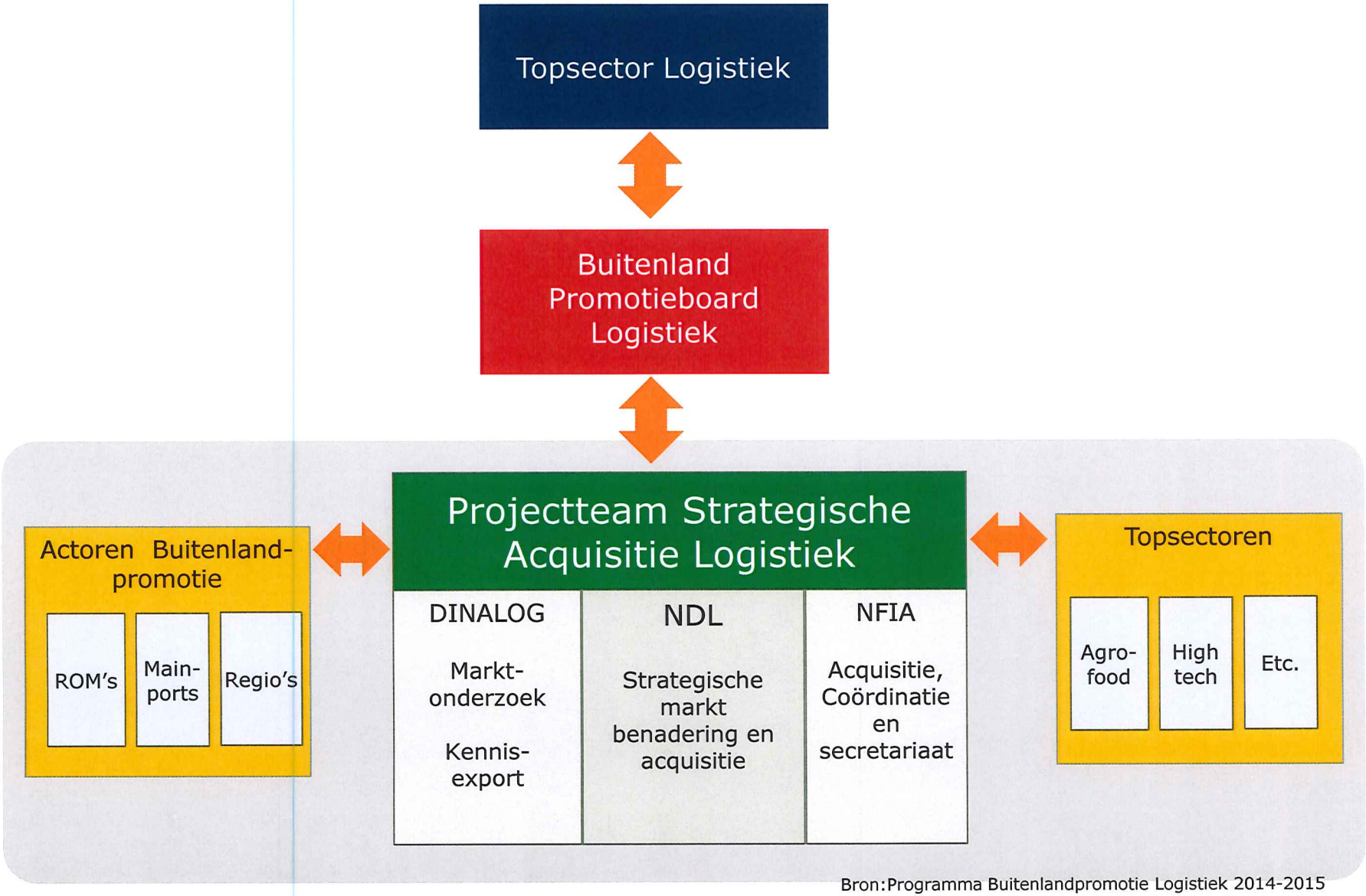




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Organisatie buitenlandpromotie



Bron: Programma Buitenlandpromotie Logistiek 2014-2015

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Proposities

- Life Sciences& Health
- E-commere
- Service Logistiek

Download: www.ndl.nl/proposities/







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Aanpak

1. 4 kick-off evenementen -> SWOT-analayses
2. 25 1-op-1 gesprekken met stakeholders
3. Concept logistieke propositie Nederland LS&H, E-commerce en Service Logistiek
4. Follow-up bijeenkomst
5. Finale logistieke propositie Nederland LS&H, E-commerce en Service Logistiek

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SWOT analyses

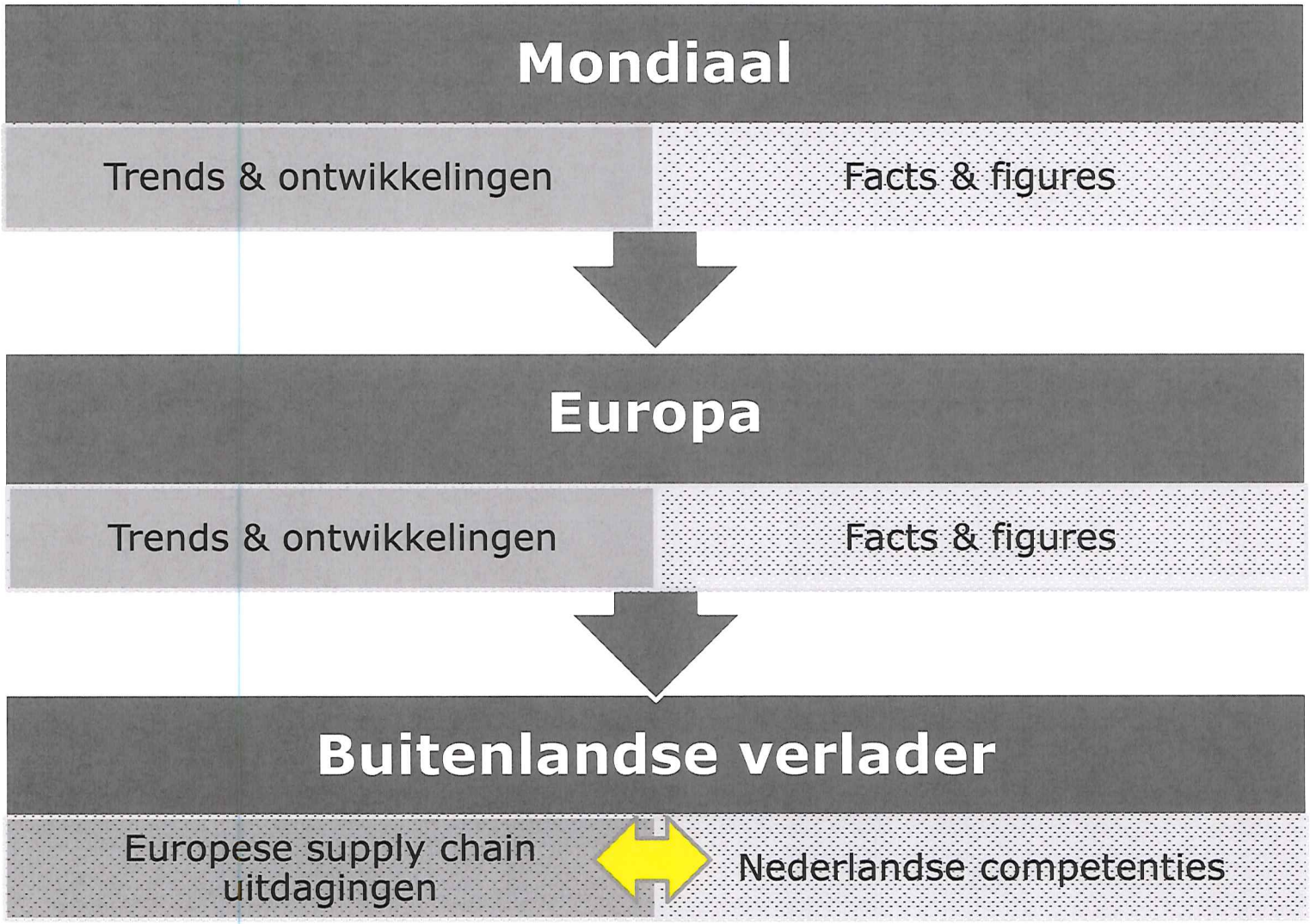
LS&H

Sterktes	Zwaktes
• Relatieve ligging • Infrastructuur • (Achterland)verbindingen • Arbeid: flexibiliteit, productiviteit, niveau, meertaligheid, continuïteit • Belastingklimaat • Toegankelijkheid van de overheid • Onafhankelijke positie door kleine thuismarkt in relatie tot Duitsland en Frankrijk • Testimonials • Kennisinfrastructuur • Martk NW Europa • Netwerk Schiphol: betrouwbaarheid belly freight • Logistieke kennis	• Cool chain infrastructuur • Relatief kleine thuismarkt • Kosten parcel deliveries naar Duitsland • Sector kennis
Kansen	**Bedreigingen**
• Optimaliseren cool chain • Kennis verder ontwikkelen • VAS verder ontwikkelen • Samenwerking sectoren LS&H en Food • Retourlogistiekdisposables • Groeimarkt • Hoge toegevoegde waarde • Van care naar preventie	• Grondprijs • Kavelgrootte • Kosten van arbeid • Innovatie en investeringsklimaat Duitsland • Duitse carriers halen op in NL

Vraag 1 - Wat zijn de leading experts die we in ieder geval moeten spreken om een goede propositie en actieplan voor LS&H op te stellen?	Rhenus, Amgen (via Bodo de Wit), Philips/FEI (via Ben Engel), Buck Consultants Sikko Zoer van Medtronic, Hans Willems van Boston Scientific, Norbert Keller van Abbott, allen met EDC gevestigd in Heerlen
Vraag 2 - In welke landen liggen de beste kansen voor het aantrekken van investeringen, aantrekken ladingstromen, kennisexport op het gebied van LS&H?	USA, UK, Duitsland, India, Israël, Japan, China en Taiwan
Vraag 3 - Op welke events liggen de beste kansen voor het ontwikkelen van een relevant internationaal netwerk op het gebied van LS&H?	CORENET (USA), Logipharma (EUROPA), MEDICA (Dusseldorf)
Vraag 4 - Hoe kunnen we het best komen tot een lijst van bedrijven, waarbij de propositie voor LS&H in ieder geval bekend moet zijn?	In de focus markten gebruik maken van input NFIA buitenkantoren (welke bedrijven staan op het netvlies) Voeding vanuit het netwerk – interessante ontwikkelingen Bedrijven in de media
Vraag 5 - Welke andere activiteiten moeten volgens jullie ondernomen worden in het kader van het actieplan LS&H?	Allereerst opbouwen proposities Rol NFIA – NDL – PAP's (regionale acquisitie partners) - Afstemming over delen informatie over leads en procesvoortgang (zichtbaarheid en evt. betrokkenheid partners in achilles) Afstemming over reizen/acties – maken jaaragend
Vraag 6 - Hoe zou je de resultaten van het actieplan LS&H kunnen definiëren?	Actieplan is niet gedeeld vandaag. Resultaten eerst meten naar aantallen leads – niet direct naar landingen. Duurt even voordat vanuit proactieve/strategische aanpak projecten gaan landen

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Opbouw proposities



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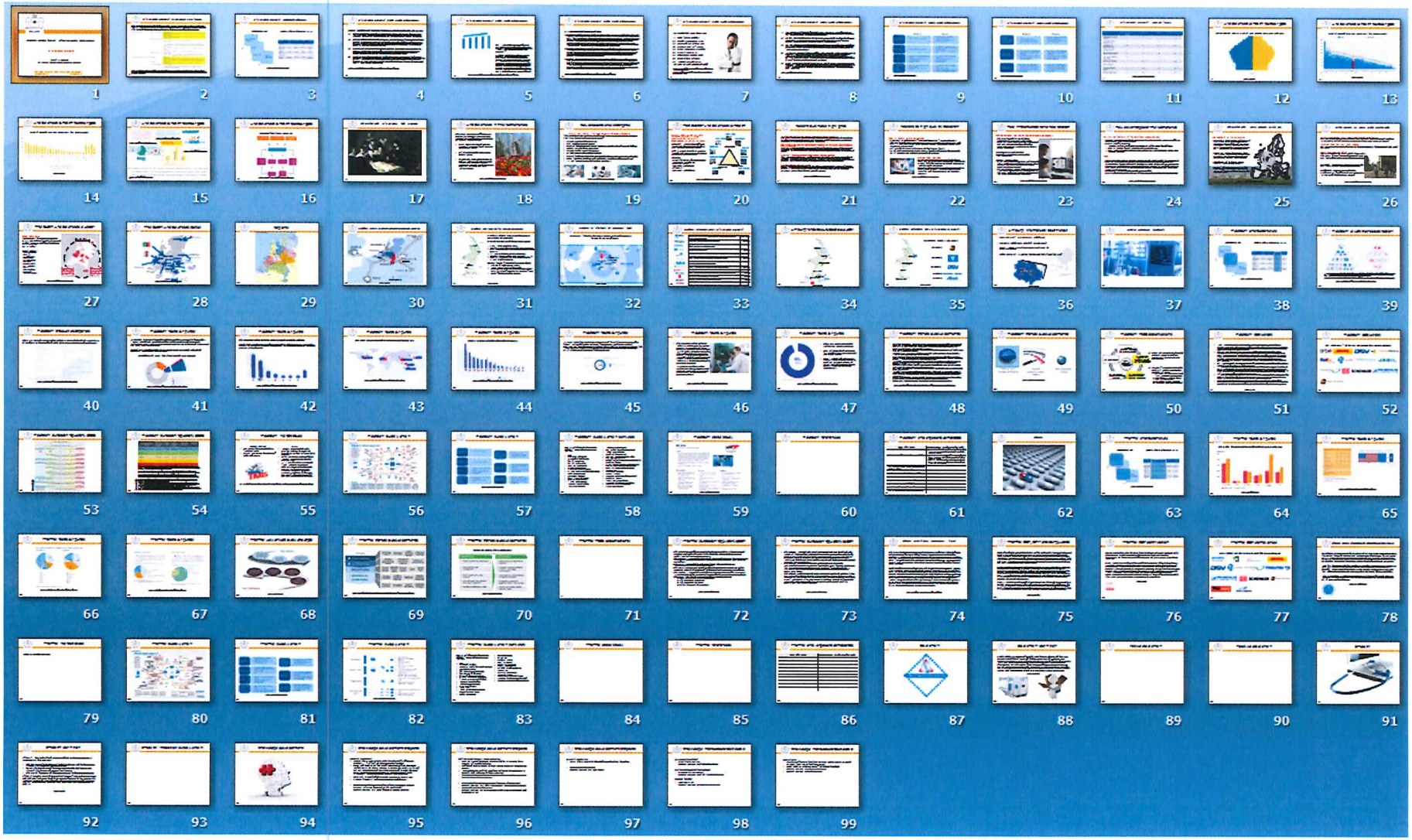
Presentatielijnen LS&H

- Generieke propositie
- Sectorkenmerken/schets
  - (Sub)sectoren en segmentering
    - GICS verdeling en toelichting
    - Focus subsectoren
    - Segmentering
  - Trends en ontwikkelingen in LS&H
  - Facts & figures
  - Uitdagingen
- Nederland: Life Sciences & Health hub in Europa
- Regionale proposities
- Medtech
  - Subsectorkenmerken/schets
  - Trends & ontwikkelingen
  - Facts & figures
  - Uitdagingen
  - ISO 13485
  - Regelgeving en compliance
  - Indirecte belastingen specifiek
  - Supply chain karakteristieken
  - Case study
  - Referenties
  - Uitdagingen verlader versus competenties Nederland
- Pharma
  - Subsectorkenmerken/schets
  - Trends & ontwikkelingen
  - Facts & figures
  - Uitdagingen
  - GDP en CEIV
  - Regelgeving en compliance
  - Indirecte belastingen specifiek
  - Supply chain karakteristieken
    - Beperking van optimalisatiemogelijkheden door regelgeving
  - Case study
  - Referenties
  - Uitdagingen verlader versus competenties Nederland
- Cool chain
  - Active
  - Passive
- E-health/business-to-patient (B2P)
- Kennisontwikkeling

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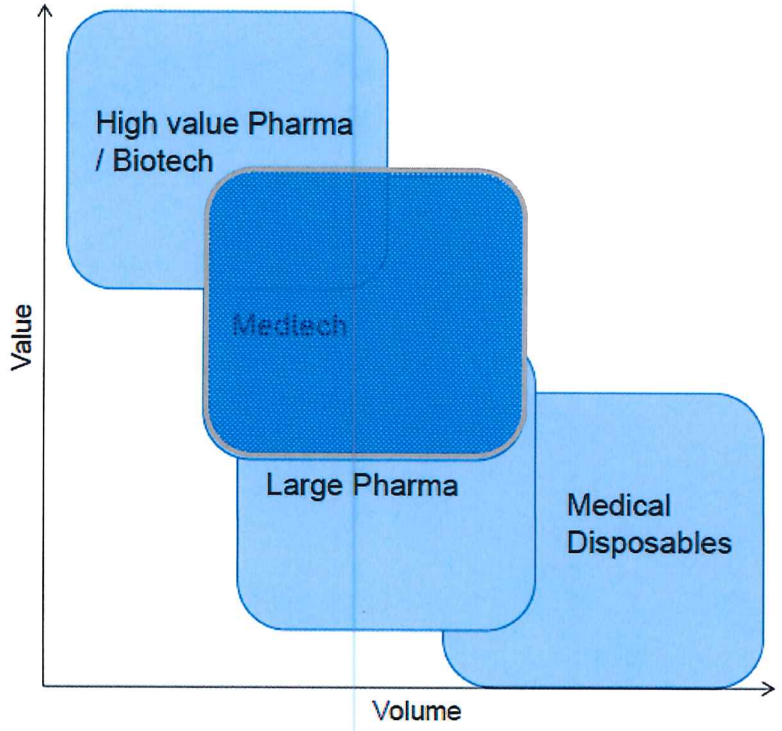
Living document



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Medtech: characteristics

Segmentation



Supply chain characteristics

Elements	High value pharma / biotech	Large Pharma	Medtech	Medical Disposables
Value density	++ / +++	- / +	++ / +++	-
Volume	-	++	+	++ / +++
Order to delivery leadtime (EU)	Next-day	Next-day – 72 hours	Next-day (prio)	Next-day – 72 hours
Temp control importance	+++	++	+	0 / +
Distribution profile	Parcel	Pallet	Parcel	Pallet
Level of country-specific SKUs	+++	++	+++	+ / ++
Main commercial channel	Mix Direct/Indirect	Indirect	Direct	Mix Direct/Indirect

Source: Buck Consultants International

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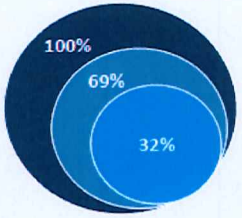
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European E-commerce at a glance

Europe 2013 Key B2C E-commerce Data of Goods and Services at a Glance







816 million people live in Europe

565 million people use the Internet

264 million people are e-shoppers

€ 363.1 bn Turnover E-commerce Goods & Services

West	€ 177.7 bn +12.4%
Central	€ 93.3 bn +22.7%
South	€ 40.8 bn +18.9%
North	€ 31.9 bn +12.7%
East	€ 19.3 bn +47.3%



Average spending per e-shopper € 1,376

228 million e-households



Europe
€ 363.1 bn 16.3%

EU28
€ 317.9 bn 14.7%



2.2% eGDP

€ 16.4 trn GDP 2013

5.7% Estimated share of online goods in total retail of goods

"443 million social media users"

2,[illegible],[illegible]+ jobs directly or indirectly via e-commerce

645,000+ estimated online businesses

3.7 billion+ number of parcels annually (f)



UK, Germany, France account for 61% of total e-commerce sales in Europe

Top 5 mature e-commerce countries in turnover (million)

UK	€ 107,157
Germany	€ 63,400
France	€ 51,100
Austria	€ 10,970
Netherlands	€ 10,583

Top emerging countries

Russia	€ 15,500
Spain	€ 14,414
Italy	€ 11,268
Poland	€ 5,225

In cooperation with: GFK

Powered by: globalcollect, informatica (Put potential to work:), richrelevance, SALESUPPLY

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www.ecommerce-europe.eu

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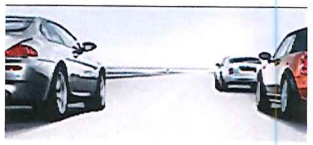
Free download at:
https://www.ecommerce-europe.eu/facts-figures/free-downloads

ecommerce is growing very fast in Europe and still has massive growth potential

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Service Logistics: market

Service and parts business in global industry

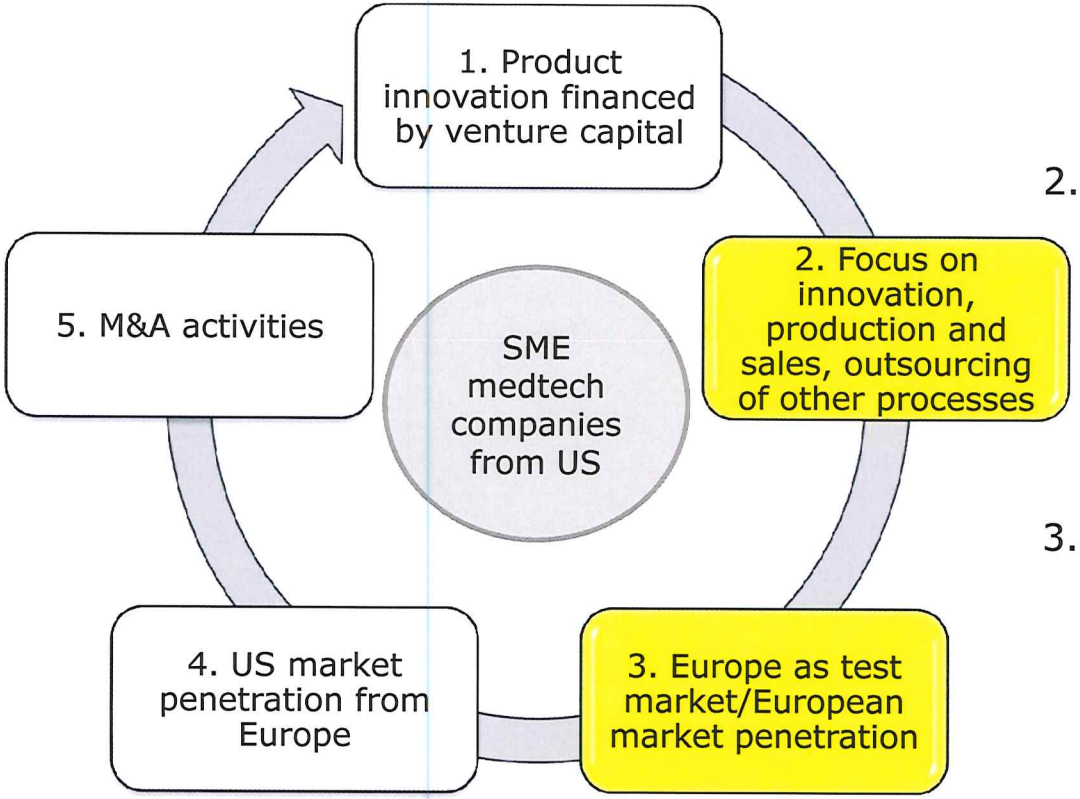



Global industry	Share of service and parts business in overall sales Average (percent)
Aerospace and defense	47%
Automotive and commercial vehicles	37%
Diversified manufacturing and industrial products	20%
High technology and telecommunications equipment	19%
Life sciences/medical devices	21%
All companies	26%

Source: Deloitte Research, based on the Global Service and Parts Management Benchmark, Survey

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Medtech: HIDC observations

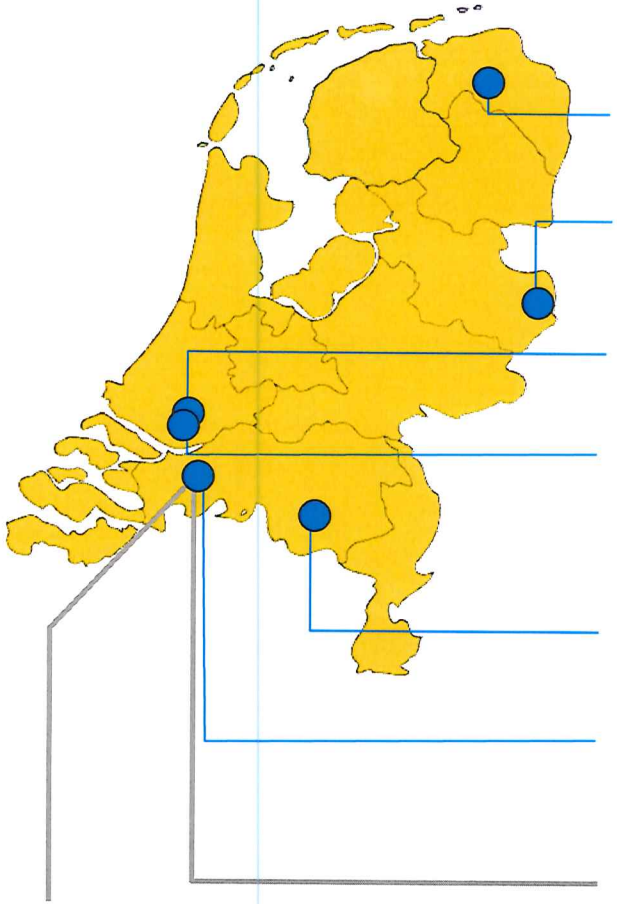


2. Focus on core processes driven by venture capitalists, non-core processes like supply chain are outsourced

3. Europe (frequently Benelux and/or Nordics) is used as test market for a number of reasons:
   1. CE-marking relatively easy and fast compared to FDA approval
   2. ACA domestic medical devices tax (2.3%) in US
   3. Reimbursement in Europe
   4. International tax planning (IP)

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Service Logistics
Dutch Knowledge institutes



University of Groningen

University of Twente

University of Applied Sciences Rotterdam

Erasmus University Rotterdam,
School of Economics

Eindhoven University of Technology

University of Applied Sciences Breda (NHTV)

DINALOG
Dutch Institute
for Advanced Logistics

DUTCH INSTITUTE
WORLD CLASS
MAINTENANCE

Medtech: case study

WL Gore

EMEA/APAC distribution centre

GORE
Creative Technologies Worldwide

CLIENT

- the Gore Medical Products Division provides creative healing solutions to complex medical problems. Gore provides such products as bio absorbable devices, synthetic vascular grafts, interventional devices, endovascular stent-grafts, unique materials for hernia repair, and sutures for use in vascular, cardiac, general surgery and orthopaedic procedures.
- approximately 9,500 associates in more than 30 countries around the world.
- annual worldwide sales of 3 billion US dollars



REQUIREMENTS

- warehousing and distribution to EMEA & APAC hospitals, clinics and research centres
- operation of the EMEA/APAC warehouse with more than 2.500 different items
- handling over 250.000 units & 40.000 RMA units per year
- FEFO, country specific tags, batch/lot control, multilingual shipping documents

SOLUTION

- product-specific shelve storage
- real time inventory management system
- product-specific packing for shipment
- multi handling checks to ensure high order accuracy
- line hauls to domestic carriers for hospital deliveries
- vanilla products in stock, postponed configuration

BENEFITS

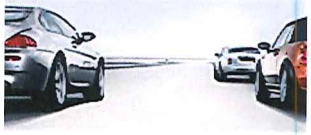
- time critical distribution out of central hub in the Netherlands
- focus on core business
- minimised delivery/shipping/ specific handling times
- completely automated export and import avoiding any delays
- VAT deferment for EU sales (NL law)
- inventory accuracy of 99,99%

Source: Rhenus Contract Logistics

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Service logistics - Dutch innovation











Spare parts



- SINTAS
- Shared Business Intelligence Cell
- IZI Motive
- Planning Services
- Ultimate Spare Parts Planning

Maintenance



- MaSelMa
- ProSeLo
- Coordinated Advance Maintenance and Logistics planning for the process industries

Supply chain



- Value Creation by Closing the Loop
- Service Logistics for Advance Capital Goods
- Sustainable Service Logistics for Offshore Windfarms

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Limburg: references EDC's Life Sciences & Health

EMEA Distribution Center: Customer Service, Logistics, Operations, Quality Assurance and Finance	140 empl.
Logistics, Warehousing and Customer Service	60 empl.
EDC cardiovascular devices. SSC: European HR, IT, partly Finance. Coordination Clinical Research for minimal invasive	350 empl.
EMEA distribution center	15 empl.
Design and production X-ray image intensifiers en CT scanners	80 empl.
EDC, Sales & Marketing, Service & Repair medical devices	60 empl.
3 Locations: R&D/Clinical Research, European Operations Center (EDC + SSC), Assembly Operation pulmonary devices	1100 empl.
EHQ, sterilants, water purification products, dialysis solutions	35 empl.
EHQ, EMEA Distribution & Warehousing, Customer Service	50 empl.
R&D, manufacturing adhesive coatings,sterile grade packaging materials	25 empl.
EDC and operations defibrillation technology	30 empl.
EDC orthopedic implants for knee, hip and spine	75 empl.
EDC, R&D, product development, manufacturing, ultrasound systems	150 empl.

Source: LIOF

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Limburg: references Life Sciences & Health



Source: LIOF

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Actieplan

	LS&H	E-commerce	Service logistics
Q1:	•SIG		• SIG: Case & netwerk ontwikkeling
Q2:	•BIO – US •CMEF - China	•SIG •Global E-commerce Summit - Spanje	• ESLA (DE)
Q3:	•SIG		• Pilot development
Q4:	•Medica - Duitsland	•SIG	
Nog te plannen activiteiten:	Top 4 landen: •US •China •India •Japan	Top 2 landen: •US •China	Top landen: • Duitsland • US • Zuid Afrika (?)
Stakeholder reizen:	US en China		

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Discussie

- Wat ontbreekt nog in de proposities? Hoe kunnen de proposities verder versterkt worden?

- Hoe kan de propositie nog beter worden gebruikt voor het aantrekken van investeringen en landingstromen en de export van kennis en kunde?