



Around the world,  
down to earth.



## KEY NUMBERS

# Creating value through our partnership in logistics

**40**

locations

**850K**

sqm warehouse

**500**

trucks

**2.000**

trailers

**15**

barges

**8**

rail linked hubs

**9**

water linked hubs

**35**

years

**2.200**








employees

**315**

€ mio turnover

## OUR SERVICES

# Tailor-made logistics services

	Multimodal Transport
	Port & Inland Terminal Logistics
	Storage
	Value-added Logistics
	Depot & Container Logistics
	Forwarding
	On-site Logistics

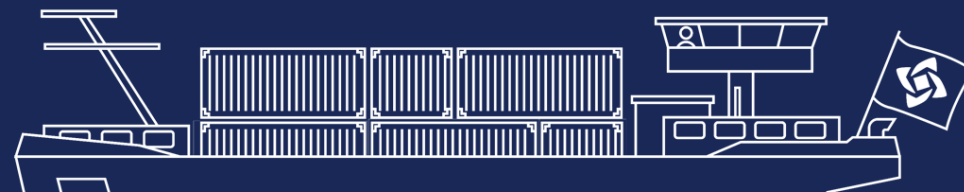


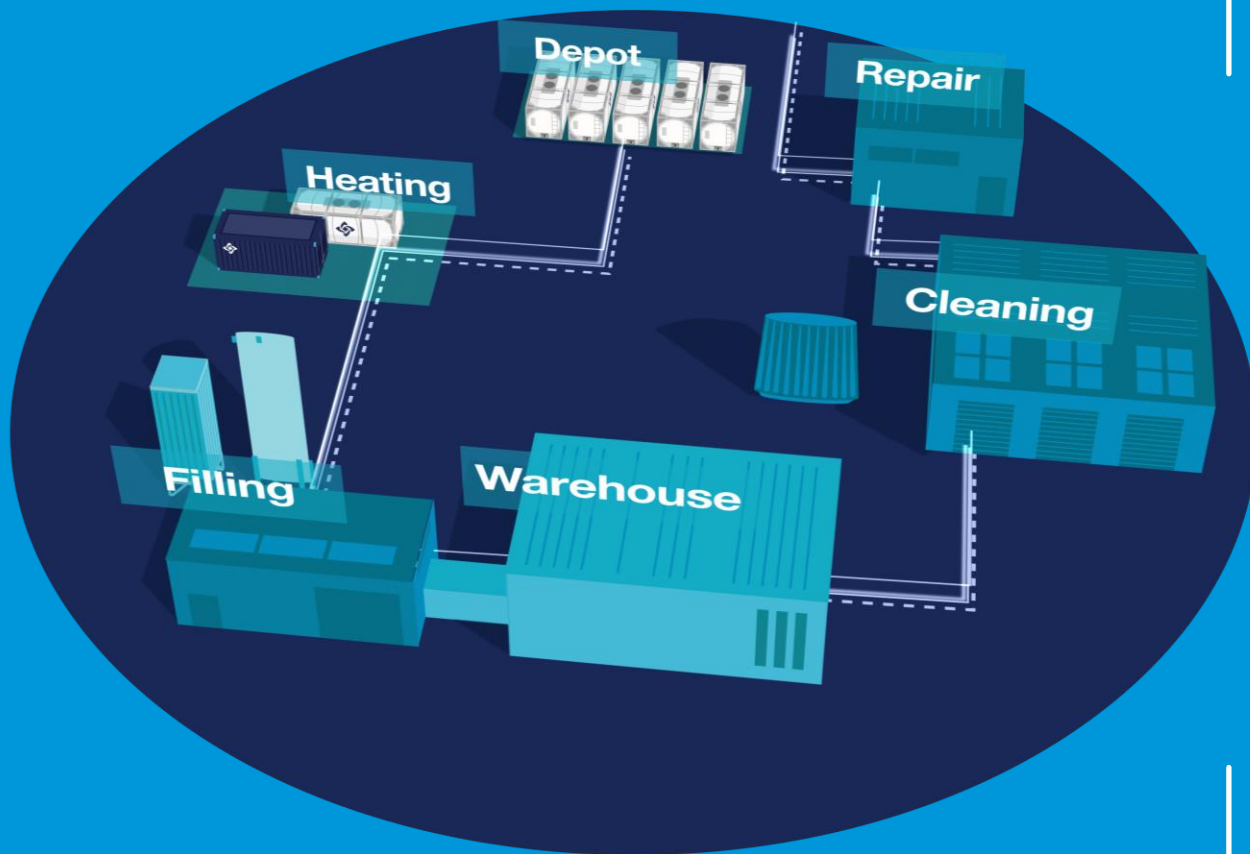




Van Moer Logistics creates **a true one-stop shop** where its various transport and logistics services work seamlessly together, while leveraging **global connectivity** through strategically located and multimodally linked logistics clusters.

The result is **The Perfect Flow**, allowing us to provide our partners with **smart and sustainable** solutions.





ONE-STOP SHOP THROUGH CENTRALISED SERVICES

## Centralised services

Our transport and logistics services work seamlessly together to create **integrated operations**. We offer these centralised services on a broad geographical level, but we also create tailored and integrated solutions **within operational hubs**, ensuring maximum efficiency and flexibility.

This integration allows our partners to save on unnecessary transport, administration, and costs, as everything is streamlined and **efficiently managed** under one roof.



GLOBAL CONNECTIVITY THROUGH INLAND ANCHORING

## Multimodal connection

Our strategically located logistics clusters are connected to Europe's leading gateways through our **multimodal infrastructure**, including inland and estuary barges, rail-connected hubs, and trucks.

Our daily services to major ports guarantee **global connectivity**, while our inland presence ensures smooth distribution throughout the hinterland.





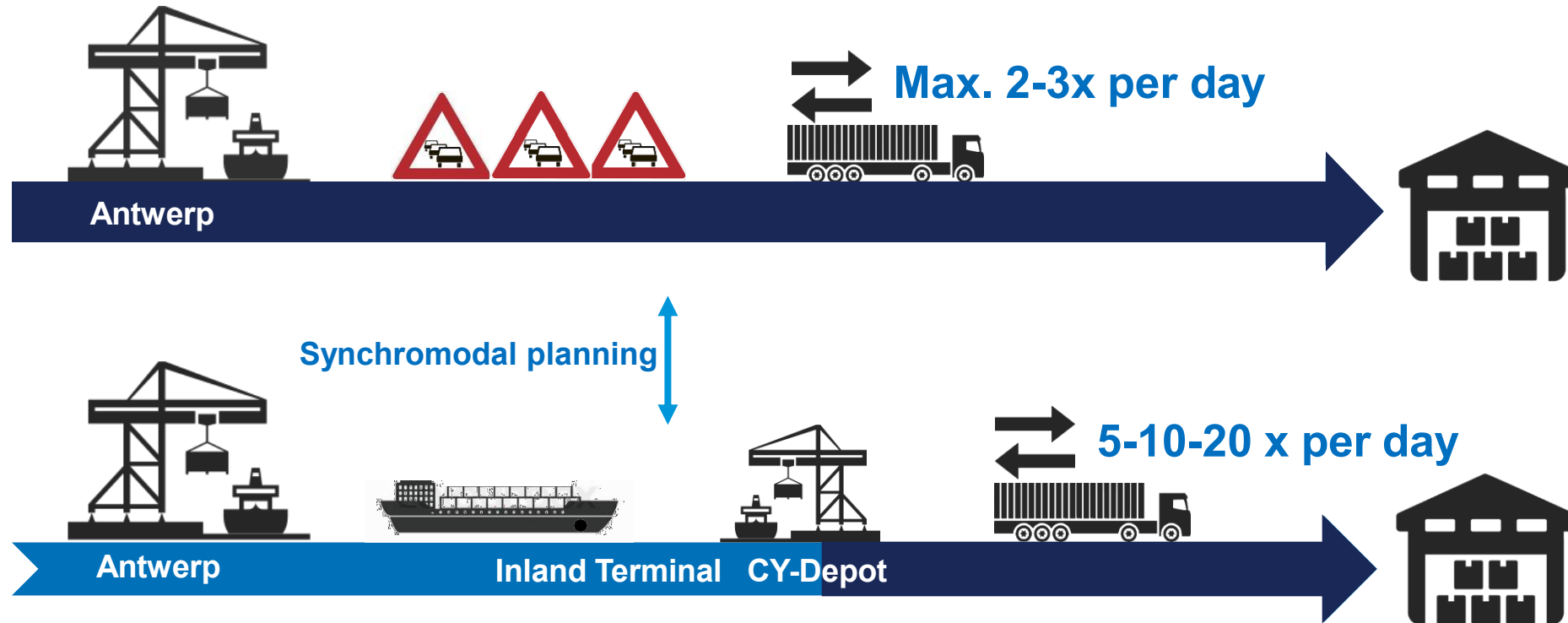
# Intermodal Solutions





## Increasing Reliability

# Improving the 'Just-In-Time' principle



7-8 departures per week (Antwerp – Brussels)

5-6 departures per week (La Louvière – Brussels)

Making the Business Case Work

# Mastering the three cost drivers



Level of volume vs  
Capital intensity



Cost of empty-container  
repositioning



Structure of the last  
mile



Making the Business Case Work

# Mastering the three cost drivers



**Level of volume vs  
Capital intensity**

*Fixed costs erode margins when  
volumes dip.*

**Cost of empty-container  
repositioning** >

Balanced fleet mix

**Structure of the last  
mile** >

Asset-ownership strategy

Transition risk: include  
sustainability criteria



Making the Business Case Work

# Mastering the three cost drivers



578 TEU



# Mastering the three cost drivers



Level of volume vs  
Capital intensity



Cost of empty-container  
repositioning

*Inland depots eliminate expensive  
empty container kilometres*

Structure of the last  
mile



Carrier Haulage (CY)

Internally netting import and  
export



# Mastering the three cost drivers



Level of volume vs  
Capital intensity



Cost of empty-container  
repositioning



Structure of the last mile

*After the barge leg, last-mile  
trucking dominates cost.*

30km 'sweet spot'

Unexplored potential

From “Unknown & Unloved” to Proven Game-Changer

## Why a full supply-chain lens unlocks latent barge potential

- ▢ ‘Unknown and Unloved’
- ▢ Focus on ‘door-to-door freight rate’
  - ▢ Overlook broader supply-chain costs
  - ▢ Overlook sustainability criteria
- ▢ Need for ‘Internal Champions’
  - ▢ Van Moer Logistics in an informative and inspiring role

▢ We map flows, expose hidden costs, add verified CO<sub>2</sub> data, and turn untapped barge potential into measurable value.





# Brussels as strategic hub

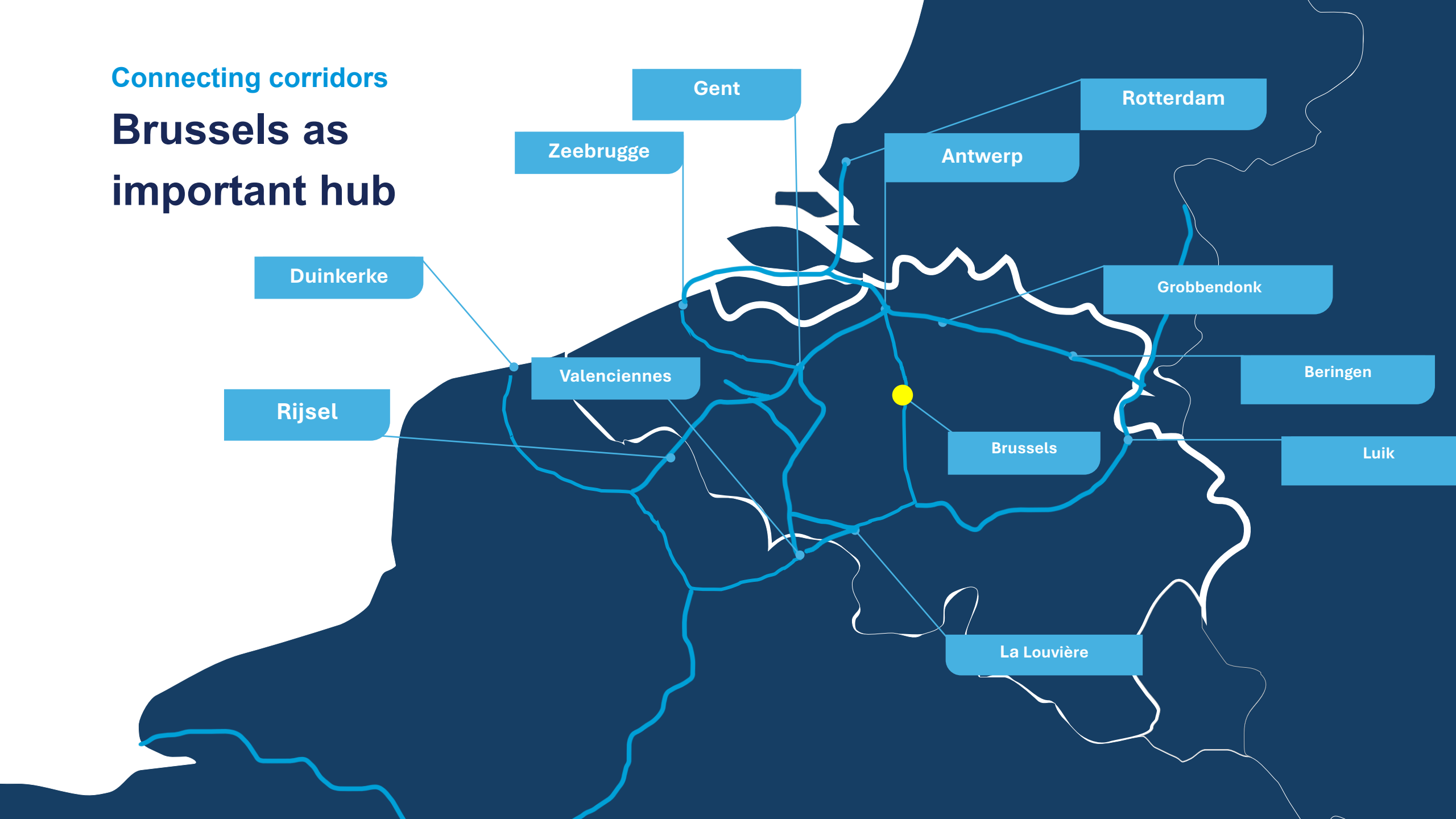


**VAN MOER**  
Logistics



Connecting corridors

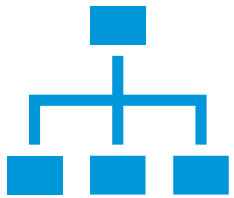
## Brussels as important hub



Looking forward

## Evolutions & Forecasts

- ▢ Road keeps dominating and **congestion** around Brussels/Antwerp remains structurally high;
- ▢ Real modal shift progress is **limited** – some speak of ‘**reverse modal shift**’;
  - ▢ Strong road competitiveness vs. weak perception of inland waterways;
  - ▢ **Road lock-in** is an observed phenomenon.
- ▢ Perseverance wins! Some current evolution/needs:



**Governance  
Alignment**



**EU Green Deal &  
TEN-T**



**War For Talent**



Looking forward

# Evolutions & Forecasts

- ▢ We expect a medium-time growth based on different growth levers:
  - ▢ Tapping unexplored potential (e.g. north of France)
  - ▢ Construction sector (Brussels)
  - ▢ Schaarbeek-Vorming
- ▢ Van Moer Logistics will focus on:



**Cost & Operations  
Management**



**Intermodal  
Ecosystem**



**Digitalisation &  
Decarbonisation**



Committed to creating value  
through our partnership in logistics.



**VAN MOER**  
Logistics