



E-Commerce Opportunities in Europe

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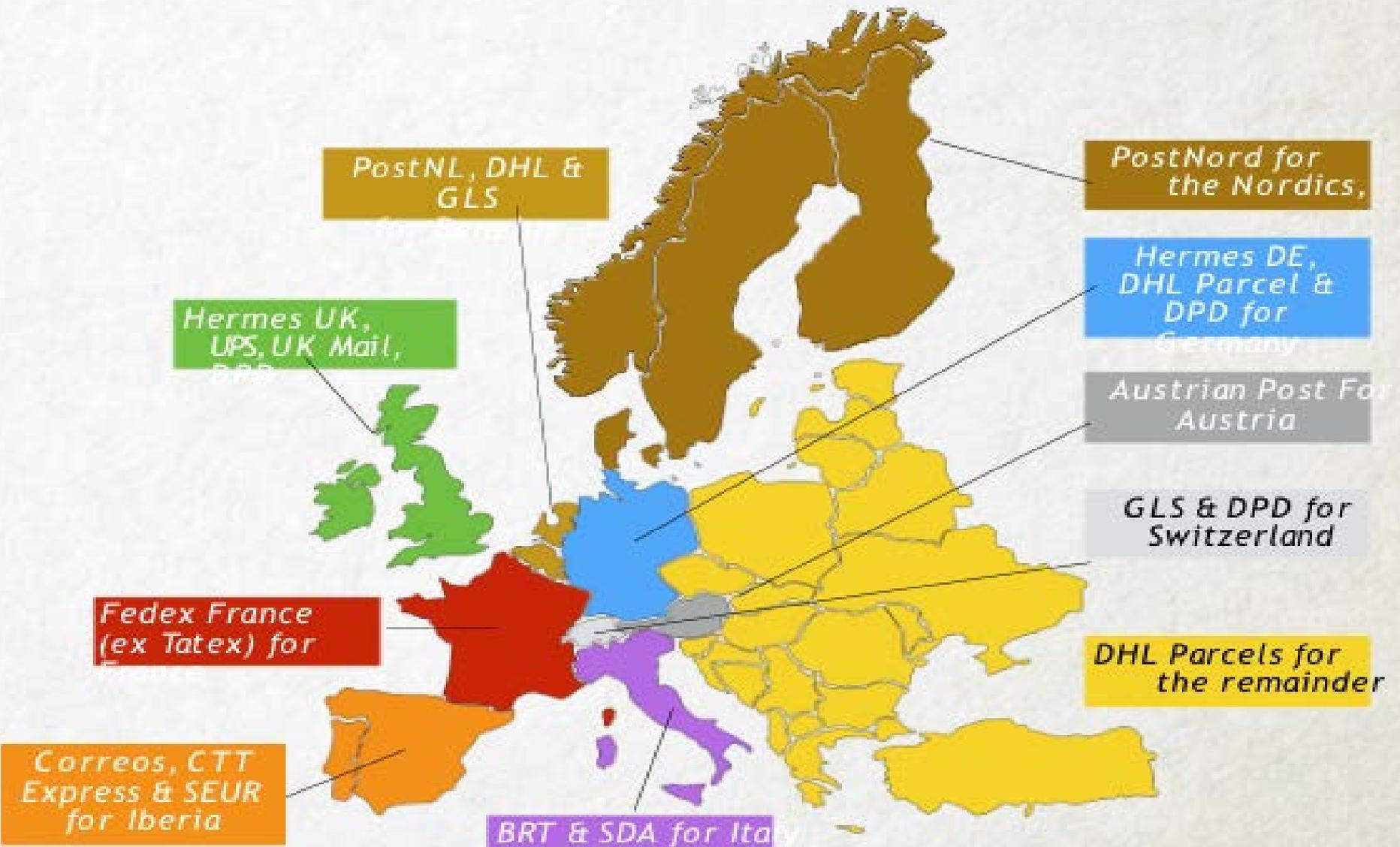
The European e-commerce market



Needed market expansion capabilities.



Illustration of recommended Local Heroes (Phase1)



E-commerce needs

1. Short leadtimes to European consumers



- Short lead times, to and from customers in and outside Europe
- Late cut off times
- Low last mile rates
- Strong accessibility to parcel networks
- Solid IT infrastructure

2. Flexible warehouse capacity



- Need for sites up to 100.000m²
- Need for high warehouses
- Need for 24/7 operations
- Flexibility to expand capacity
- Direct availability of warehouse capacity

3. Strong E-commerce skills



- Strongly educated and innovative skills in the area of content marketing, E-fulfilment and ICT
- Availability of multilingual personnel
- Availability of flexible workforce

4. (Multimodal) inbound



- Connected to major gateways to Europe, both air and ocean
- Multimodal connections between hinterland and major ports, like road, rail and inland waterways

5. Competitive tax & customs regulations



- VAT regulations
- Competitive corporate tax
- Bonded warehousing opportunity
- Cooperative and compliant tax and customs culture