The European 3PL Market
A brief analysis of eyefortransport’s recent survey

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For further details please contact:
Laura Goddard - eyefortransport
Email: lgoddard@eyefortransport.com
Telephone: +44 (0) 207 375 7231
US Toll Free: 1 800 814 3459 ext 231
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Introduction

There have been inevitable shifts in perceptions and predications relating to the 3PL industry since our European survey of one year ago, but the broad picture remains essentially the same. Issues that players in the industry considered to be of the greatest importance in 2005 are still regarded as the important issues of today.

This report tracks some of the changes in attitudes since the previous survey. It also expands on the 2005 report by analysing new areas of concern for 3PLs and their customers in Europe.

The key findings of a year ago are still valid. Probably the most significant driver is the increasing number and complexity of demands by customers. This impetus is compelling the 3PL operators to develop new approaches and strategies in many spheres of their activities. In short, the 3PL industry is continuing to evolve.

This trend continues to validate the role of the 3PLs in all aspects of logistics. As businesses diversify and their supply chains become increasingly complex and fragile, more and more of them are outsourcing their logistics in order to ensure economical, reliable and efficient deliveries from their suppliers and to their markets. It has become almost a maxim of commerce that a 3PL should be not merely a contractor, but in many senses also a business partner.

Merely validating the role of 3PLs does not imply that 3PLs will be successful. Competition among 3PLs has become intense. Many have resorted to consolidation so that they can expand their capabilities across sectors and regions. Consolidation may help the larger 3PLs to overcome fragmentation and claim a bigger slice of the market. For smaller companies, consolidation may be crucial to their very survival.

Mergers and acquisitions remain high on the agendas of 3PLs. They recognise that consolidation can be a doubled-edge strategic weapon. Although it may strengthen a company’s position, it can also turn that company into a target. The hard truth of evolution applies as much in business as it does in nature — the weak will fall.

In an effort to establish the nature of the current challenges faced by the European 3PL industry, eyefortransport conducted the European 3PL Market Survey during May-June 2006.

Much of the data gathered in the survey will be discussed and debated at the 4th eyefortransport European 3PL Summit 2006, which takes place on October 3-5 in Brussels.

For more information on the eyefortransport survey results or the conference, contact Laura Goddard on email lgoddard@eyefortransport.com or call +44 (0) 207 375 7231 (or US Toll Free on 1 800 814 3459 ext 231).
II Survey overview

The survey was conducted via the Internet, and responses were solicited by targeted e-mail lists, select trade association memberships, various related-industry databases and other targeted methods. No individual responses were analysed, but rather all responses were consolidated.

The aim of the survey was to identify the main challenges for European 3PLs, as well as the best potential opportunities in the different geographical regions, industry segments and market verticals, and to compare this information with the data collected in a similar survey last year.

Respondents were asked a number of questions to establish the biggest challenges and key concerns facing 3PLs in Europe. They were also asked to identify potential opportunities, and whether they have RFID or plan to deploy it in their operations.

III Profile of respondents participating in the survey

Almost 400 logistics professionals from 3PLs, freight forwarders, carriers, warehouse operators, shippers, consultants and technology providers responded to the survey.

The chart below shows the distribution among the respondents in this survey.
IV The main challenges for European 3PLs

Maintaining profits under price pressures from customers is still seen as the biggest challenge to European 3PLs, although to a lesser extent than last year. A total of 79% of respondents said it was a ‘big challenge’ or a ‘very big challenge’, compared with 87% in 2005.

A consideration not tested in 2005, relationship with customers, is perceived as a big or very big challenge by 78% of 3PLs. This factor, in combination with the price pressures from customers, points to the considerable sensitivity of 3PLs to the markets they serve.

Globalisation of the 3PL market and delivering services in new geographic regions was rated a big or very big challenge by 68% of respondents, up from 64% in 2005.

The next highest ranked factor was consistently delivering the latest cutting edge technology to customers, considered a big or very big challenge by 59%, significantly more than the 44% in 2005.

Completing the ‘top five’ challenges as perceived in 2006 was competing with giant global 3PLs, considered a serious challenge by 52% this year compared with 49% last year.
One of the challenges rated as a big or very big challenge last year, the emergence of 4PLs / LLPs, is viewed as a somewhat more serious challenge in 2006 (42%) than in 2005 (37%).

V Opportunities for growth in the European 3PL industry

Management, technology, management solutions and consultancy were identified as greater growth opportunities than physical services such as freight carriage or warehousing in the 2006 survey.

Providing technology / IT solutions was rated a ‘good’ or ‘best’ opportunity by 77% of respondents, well up from 65% in 2005. Other most promising opportunities in 2006 were seen to be supply chain consultancy & design (68% in both 2006 and 2005), reverse logistics (68% against 63% in 2005) and global freight management (72%, markedly up from 62% in 2005).

Areas of growth selected by the fewest respondents were once again packing / picking with 43% ‘good’ and ‘best’ rating (32% in 2005), general warehousing with 35% (29% in 2005) and freight audit payment with 38% (28% in 2005).

<table>
<thead>
<tr>
<th>Opportunities for growth in the European 3PL industry</th>
<th>2006</th>
<th>2005</th>
</tr>
</thead>
<tbody>
<tr>
<td>Providing technology / IT solutions</td>
<td>10%</td>
<td>18%</td>
</tr>
<tr>
<td>Supply chain consultancy &amp; design</td>
<td>8%</td>
<td>22%</td>
</tr>
<tr>
<td>Reverse logistics</td>
<td>8%</td>
<td>23%</td>
</tr>
<tr>
<td>Global freight management</td>
<td>6%</td>
<td>21%</td>
</tr>
<tr>
<td>Spare parts logistics</td>
<td>11%</td>
<td>29%</td>
</tr>
<tr>
<td>4PL / LLP services</td>
<td>9%</td>
<td>26%</td>
</tr>
<tr>
<td>Providing RFID solutions</td>
<td>15%</td>
<td>34%</td>
</tr>
<tr>
<td>WEEE directive opportunities</td>
<td>10%</td>
<td>45%</td>
</tr>
<tr>
<td>General transportation / distribution</td>
<td>5%</td>
<td>35%</td>
</tr>
<tr>
<td>Packing / picking</td>
<td>14%</td>
<td>40%</td>
</tr>
<tr>
<td>General warehousing</td>
<td>3%</td>
<td>20%</td>
</tr>
<tr>
<td>Freight audit payment</td>
<td>19%</td>
<td>40%</td>
</tr>
</tbody>
</table>

1 (worst opportunities) 2 3 4 5 (best opportunities)
VI Potential growth per geographic region

Respondents were once again asked to rate the geographic regions that they consider to have the greatest growth possibilities for their companies within the next two – three years.

China has lost some of the appeal it held a year ago, although it is still considered to be the most promising region for expansion. In 2006, 37% of respondents believed China had the most growth potential. This is substantially less than the 50% who gave it their highest rating a year ago. However, more than two-thirds of respondents (70%) still believe China has *either* the most ‘most’ or ‘very good’ growth potential.

In the combined perception of ‘most’ and ‘very good’ potential, India (56% of respondents in both 2005 and 2006) and Eastern Europe (65% in 2006, 66% in 2005) are considered the next most promising regions.

No single region made profound gains against China in the 2006 ratings. Russia, Brazil and the rest of Asia were all chosen by well over 50% of respondents for their ‘good’ or ‘most’ growth potential. Apart from Brazil, South America and also North America are generally seen to show little promise of market growth for the 3PLs.
VII Expansion strategy

The 2006 survey introduced a number of new questions. To investigate expansion strategy, the question was: What is your business strategy for expanding into new geographical areas?

The greatest response (40%) came from 3PLs that react to the needs of customers by going into new geographical areas after their customers have decided to go there. A significant 21%, however, anticipate customers' expansion plans by venturing into new territory before there is an actual demand from their customers for services in the new regions.

A variety of ‘other’ reasons are listed by 16% of respondents. For example, some may have entered into joint ventures (not acquisitions) with companies that operate in areas beyond the respondent’s normal sphere of operations.
VIII Potential growth per vertical market

Respondents were asked to rate the vertical markets that they consider to have the greatest growth possibilities for their companies within the next two - three years.

According to the survey, all of the major sectors have at least moderate growth potential. Even the food sector, which is considered to have less potential now than a year ago, received a rating from 63% of respondents (down from 68% in 2005) ranging from average to greatest potential growth.

87% believe the hi-tech / electronics sector has the greatest potential (84% in 2005), followed by pharma / medical / healthcare with 82% (74% in 2005).

FMCG / CGP with 79% (same as 2005), retail with 77% (79% in 2005) and industrial with 77% (down from 81% in 2005) are also strongly favoured for their growth potential.
IX  RFID capabilities

One of the new questions in the survey asked if respondents intended to provide RFID capabilities and, if so, when they planned to release a fully functioning RFID solution.

Nearly one-third (31%) had no current plans to provide RFID. By contrast, 20% were already providing a RFID solution.

Of the remainder, constituting 49% of all the respondents, most intended to provide RFID capabilities within two years.

Respondents providing RFID capabilities
X  Contracts due for renewal

3PLs among the respondents were asked what percentage of their client contracts were due to be renewed in the next 6-12 months. On the reverse side of the same coin, users of 3PL services were asked what percentage of their contracts with 3PLs were due to be renewed in the next 6-12 months.

In the combined response, the greatest number of all respondents (39%) said that only a low number of contracts (up to 20% of all their 3PL contracts) would fall due for renewal within the next year. A small number (7% of all respondents) indicated that almost all of their contracts (between 80% and 100%) would be due for renewal in this period.

Only 14% of all respondents will need to renew 60% or more of their contracts in the next 6-12 months.

- Of all respondents, 6% answered the question: "Do you see contract renewal increasing?" One-third of these respondents said the frequency of contract renewal would increase because of shorter, more flexible contracts.
XI Advantages of the 4PL/LLP model

The survey probed respondents’ opinions on the advantages of the 4PL/LLP model in the current European market, from the perspective either of a provider or of a user of these services.

Three-quarters of the respondents (74%) believe increased level of supply chain visibility is either a ‘significant’ or the ‘most relevant’ advantage. Nearly as many (73%) gave their highest ranking to increasing the control over complex multi-country, multi-contract logistics requirements, and 67% gave their vote to ability to respond to customers’ need for supply chain innovation.

Only 11% considered increased business relationship and alignment (as opposed to 3PL) to be the most relevant advantage.

Rate the advantages of the 4PL/LLP model in the current European market

<table>
<thead>
<tr>
<th>Advantage</th>
<th>1 (not relevant)</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5 (most relevant)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Increased level of supply chain visibility</td>
<td>7%</td>
<td>18%</td>
<td>45%</td>
<td>29%</td>
<td></td>
</tr>
<tr>
<td>Increasing the control over complex multi-country, multi-contract logistics requirements</td>
<td>6%</td>
<td>21%</td>
<td>47%</td>
<td>26%</td>
<td></td>
</tr>
<tr>
<td>Ability to respond to customers’ need for supply chain innovation</td>
<td>8%</td>
<td>22%</td>
<td>45%</td>
<td>22%</td>
<td></td>
</tr>
<tr>
<td>Expertise and planning capabilities to react to supply chain volatility</td>
<td>12%</td>
<td>26%</td>
<td>40%</td>
<td>21%</td>
<td></td>
</tr>
<tr>
<td>Opportunity for cost reduction or cost improvements</td>
<td>9%</td>
<td>32%</td>
<td>38%</td>
<td>18%</td>
<td></td>
</tr>
<tr>
<td>Increased ability to handle large-scale projects</td>
<td>8%</td>
<td>22%</td>
<td>50%</td>
<td>16%</td>
<td></td>
</tr>
<tr>
<td>Increased business relationship and alignment - as opposed to with 3PL</td>
<td>11%</td>
<td>31%</td>
<td>45%</td>
<td>11%</td>
<td></td>
</tr>
</tbody>
</table>
XII Mergers and acquisitions

With mergers and acquisitions continuing at a rapid pace in Europe, respondents were asked what they regarded as the key challenges for a company which was being acquired or might be acquiring another company.

The four top answers can be summarised succinctly as information, internal integration, process facilitation and external integration.

**Information**: The greatest number of respondents (32%) assigned priority to ensuring the smooth integration of IT systems and data management.

**Integration**: 30% considered the key acquisition challenge to be the internal integration of staff, management and strategy.

**Process facilitation**: 23% thought it was most important to continue daily operations and performance without disruption.

**External integration**: 12% placed the greatest importance on smooth integration with the acquiring or acquired 3PLs’ clients.

<table>
<thead>
<tr>
<th>Key acquisition challenges</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ensuring smooth integration of IT systems and data management</td>
<td>32%</td>
</tr>
<tr>
<td>Internal cultural integration of staff / management / business strategy</td>
<td>30%</td>
</tr>
<tr>
<td>Ensuring minimal disruption to daily activity and performance</td>
<td>23%</td>
</tr>
<tr>
<td>External cultural integration – when taking on established clients from other 3PL</td>
<td>12%</td>
</tr>
<tr>
<td>Other</td>
<td>3%</td>
</tr>
</tbody>
</table>
XIII 4th eyefortransport European 3PL Summit 2006

The 4th eyefortransport European 3PL Summit will take place on October 3-5 2006 at the Hotel Le Plaza in Brussels. This marks the return of Europe's premier event for 3PLs and 3PL users to come together to benchmark best practice and to develop profitable partnerships.

250+ executives will meet to learn from 24 industry case studies, eleven panel discussions, three workshops, fourteen interactive roundtables – and take part in more than ten hours of networking time – including new one-to-one meetings and an industry gala dinner.

More than 60 executive level speakers are already confirmed from leading 3PLs, manufacturers and retailers, including: UPS SCS, Menlo, NYK, Thiel, TNT, SEKO, Hellmann, PWC, Wincanton, Dachser, Schneider Electric, HP, Black + Decker, Fresenius Medical Care, Ann Summers, TVS Automotive, BSkyB, Screwfix Direct, Liz Claiborne/MEXX and Rexam.

3PL EXECUTIVES should attend to:

• Assess you business model and future strategies: Is the 4PL or ‘one-stop-shop’ model right for your business or should you concentrate on your core capabilities and niche services?

• Find out about geographical expansion opportunities: Hear real experiences from leading 3PLs and 3PL-user's how to drive your growth in regions such as India, China and Eastern Europe.

• Discover which value-added services your customers want: Will reverse logistics, bill payment, service parts logistics, kitting, labelling or warehousing put you ahead of your competitors?

• Get top tips to profit from IT innovations: Find out the latest IT solutions for the logistics market to deliver your customers' goods faster and cheaper - including the current reality behind RFID!

• Unrivalled networking opportunity: Hear presentations directly from 3PL users and sign up for pre-arranged one to one meetings with selected companies!

3PL USERS should attend to:

• Hear from your peers the key tips on selecting, measuring and working successfully with a logistics provider

• Discover how you can best exploit the services that 3PLs offer to help drive your expansion in new regions

• Determine the optimum number of 3PLs you should be using: Does a multitude of 3PL providers mean greater expertise and cost reduction or a decline in efficiency and limited negotiating power?

• Find out how your 3PL can bring you real ROI through enhancing your operations with innovative technology

• Meet face to face with a range of 3PLs: Find out more about their services so you can make informed decisions about future outsourcing projects!

Full speaker and program details online at: www.eyefortransport.com/europe3pl

For more information on attending, exhibiting or sponsoring this event, contact Laura Goddard on email lgoddard@eyefortransport.com or call +44 (0) 207 375 7231 (or US Toll Free on 1 800 814 3459 ext 231).
What is the 3PL Summit?

...250+ senior executives, 24 industry case studies, 11 panel discussions, 3 workshops, 14 interactive roundtables and 10 hours of networking time... including a special 2 hour pre-arranged meetings event and a gala dinner!

3PL EXECUTIVES should attend to:

- Assess your business model and future strategies: Is the 4PL or ‘one-stop-shop’ model right for your business or should you concentrate on your core capabilities and niche services?
- Find out about geographical expansion opportunities: Hear real-life experiences on how to drive your growth in regions such as India, China and Central + Eastern Europe
- Discover which value-added services your customers want: Will reverse logistics, bill payment, service parts logistics, kitting, labelling or warehousing put you ahead of your competitors?
- Get top tips to profit from IT innovations: Find out about the latest IT solutions that will dramatically enhance your customers’ operations – including the current reality behind RFID!
- Unrivaled networking opportunity: Hear directly from 3PL users about their requirements and sign up for pre-arranged one to one meetings with selected companies!

3PL USERS should attend to:

- Hear key tips from your peers on selecting, measuring and working successfully with a logistics provider
- Discover how you can best exploit the services that 3PLs offer to help drive your expansion in new regions
- Determine the optimum number of 3PLs you should be using: Does a multitude of 3PL providers mean greater expertise and cost reduction or a decline in efficiency and limited negotiating power?
- Find out how your 3PL can bring you real ROI through enhancing your operations with innovative technology
- Meet face to face with a range of 3PLs: Find out more about their services so you can make informed decisions about future outsourcing projects!

Europe’s only event for 3PLs and 3PL users to come together to benchmark best practice and to develop profitable partnerships

Get expert knowledge from over 60 world-class speakers:

- John Pattullo COO EMEA DHL Exel Supply Chain
- Stewart Oades CEO Christian Salvesen

Manufacturers/Retailers who will share their secrets of working successfully with 3PLs include:
- Jean Oberle VP Group Transportation & Warehousing Schneider Electric
- Ian Taylor Logistics Operations Manager EMEA Hewlett Packard
- Steven Van Kerckhoven Int’l Trade Manager EXEA Black + Decker
- Paolo Ragusa Head of Logistics Fresenius Medical Care
- Jayaraman Arun Head of Logistics TVS Automotive Europe
- Genevieve Wood Logistics Continuous Improvement Manager B斯基B
- Chris Pearce-Ramwell Head of Transport Screwfix Direct
- John Legg VP International Distribution Liz Claiborne/MEXX
- Ake Lundbomtitle Group Supply Chain Manager Logistics Rexam

OPEN NOW to read full programme and speaker list
Learn from more than 27 leading 3PLs and 3PL users on the issues that matter to you! These topics are researched and developed by the eyefortransport team along with the senior executive speakers... to deliver you REAL LIFE EXPERIENCES, to offer you PRACTICAL TIPS & ADVICE, to share with you their EXPERT VISIONS FOR THE FUTURE...

Presentations and Case Studies are your chance to get the facts and information you need to benchmark your own business strategies... Plus your best chance to quiz industry leaders during a formal Q+A at the end of their speech!

All presenters will offer relevant and instructional PowerPoint slides to illustrate their points... THESE SLIDES WILL BE AVAILABLE TO ALL CONFERENCE ATTENDEES

Companies presenting include:

DHL
UPS Supply Chain Solutions
Christian Salvesen
TNT
Hellmann Worldwide
Wincanton
Menlo Worldwide Logistics
APL Logistics
Schneider Logistics Europe
Thiel
SKF
SEKO Worldwide
Unipart
St. John Freight Systems Belgium
Solelectron Netherlands
Schneider Electric
Hewlett Packard
Black + Decker
Liz Claiborne/MEXX
Screwfix Direct
Fresenius Medical Care
BSkyB

You've heard what the executive presenters have been through... you know what the panelists would advise... NOW tailor this knowledge to your own specific situation! Join these interactive roundtables to get a closer understanding of the topic and drill down to get valuable answers and tips for practical steps back in the office!

All discussion points take place at an actual 'roundtable' and are limited to a maximum of 15 participants to keep them interactive and productive. An industry expert leads each table to help kick-start the discussion and keep it on track within the scope of the topic.

No audio recording takes place... no PowerPoint slides are used... it's your chance to informally quiz the table leaders and fellow attendees until you have all your questions answered! Everyone learns better by getting involved and taking an active part - so use this opportunity to share your knowledge with others and benefit from their personal experiences.

Each roundtable lasts for 1 hour... you can choose to attend at least 2 during the afternoon.

REMEMBER: you get out as much as you put in: so don't be shy - talk, talk, talk!

• Specific considerations for automotive logistics
• Specific considerations for FMCG logistics
• Specific considerations for pharma, chemicals + hazardous materials logistics
• Specific considerations for fresh food logistics
• Specific considerations for hi-tech + electronic logistics
• Challenges and opportunities within the China logistics market
• Challenges and opportunities within the India logistics market
• Challenges and opportunities for logistics networks in the Middle East region
• Challenges and opportunities for logistics networks in Central + Eastern Europe
• Best practices and innovation for freight audit and payment services
• Best practices for contract negotiations and contract fulfilment
• Latest updates on RFID technology
• Best practices for outsourcing warehousing and transportation to a 3PL
• Latest updates and standards in cargo security and risk management

Make sure you're in Brussels on Monday afternoon to hear the latest industry statistics and trends from experts in their field... These sessions are designed for you to gather useful and relevant information from industry experts with a renowned knowledge of the subject matter.

Attend these workshops to ask specific questions and get valuable information that you can take back to the office and start using in your business development strategies!

• How to adapt and prosper as the European logistics landscape is transformed
• Tips on the successful selection process and measuring system for 3PL services
• Find out the latest IT developments for the logistics market and how to apply them to your business strategy
Take part in the ONLY Summit that will help you define your business priorities for the next 12 months!

**FACTS on the 3PL MARKET & OUTSOURCING LOGISTICS in EUROPE:**
- Economic activity in the EU is expected to increase by 2.1% in 2006, accelerating to 2.4% in 2007.
- It’s estimated that 77% of Western European firms are using 3PLs and market analyst datamonitor anticipates a significant growth in companies outsourcing their logistics needs to 3PLs from the automotive, consumer, hi-tech, pharmaceutical and retail industries over the next 4 years.
- So… while the bigger 3PLs grow larger through M&A, smaller operators can seize opportunities to specialise in chosen areas (through local market knowledge), sectors (niche marketing) or service skills (security, JIT, high-value, etc) to bring shippers real cost-benefits and supply chain efficiencies through an outsourced logistics operation

**BUT… 3PLs cannot afford to relax…**
Shippers are expecting more and more! **NOW YOU MUST:**
- Implement new IT solutions to increase supply chain visibility and forecasting efficiencies
- Develop effective management and relationship processes
- Integrate your service offerings and IT systems across the EU and globally
- Deliver comprehensive solutions that create impressive value for 3PL users and their supply chains

**MARKET YOUR SERVICES TO A TARGETED AUDIENCE!**
If you provide technology and consultancy solutions – make sure you attend this event to stay ahead of the market trends and inform the industry leaders of your services! Get in front of the real decision-makers at this senior-level event! With your logo displayed at the Summit and on our website, you can tell the world about your business, increase market presence and benefit from being associated with the leading industry event + business intelligence company.

Key speaking opportunities include Presentations, Panel Debates, Interactive Roundtable Discussions and Workshops.

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- Event Badge Sponsorship
- Delegate Bag / Pack Sponsorship
- Industry Networking Party Sponsor
- Industry Lunch Sponsor
- Event Coffee Break Sponsor
- Internet Café Sponsor
- On-line advertising + Sponsorship
- One-to-One Meetings + Private Meeting Rooms
- Attendee Pack Inserts
- And much more!

Whether you’re looking to develop new business, maintain relationships or raise awareness of your company’s activities, get involved TODAY to get the most coverage and exposure for your business… Call us today on +44 (20) 7375 7231 or email lgoddard@eyefortransport.com

**Past ‘3PL Summit’ & ‘Outsourcing Logistics’ delegates from LOGISTICS COMPANIES included:**
- ABX Global Account Manager
- APL, MD – UK & Ireland
- BAX Global, VP Marketing
- CH Robinson, President Europe
- Christian Salvesen, Chief Executive
- Dachser, MD & Board Spokesman
- Deutsche Post, CEO Express Europe
- DHL Solutions, EVP – BD
- EXEL, CEO EMEA
- GAC Logistics, BDM
- Gefco, MD UK
- Gondrand AG, CEO
- KN LeadLogistics, Exec VP & GM
- Maersk, Director – Solutions Sales
- Alcoa, Mgr Global Transport + Logistics Council
- Avon Cosmetics, Director – Transportation
- Black + Decker, Int’l Trade Mgr EMEA
- BP Lubricants, Logistics Director EU
- BskyB, Logistics Mgr
- CERN, Head-Logistic Services
- Eastman Kodak, Logistics Commodity Mgr
- Eaton, EU Logistics Mgr
- Gillette, Transport Optimisation Mgr
- H.J. Heinz, EU Logistics Contracts Mgr
- HP, Logistics Ops Mgr EMEA
- IBM, Global Logistics Procurement Mgr
- Intel, EMEA Program Mgr
- Interbrew, Director Procurement
- Menlo Worldwide, MD European Ops
- NYK Logistics Europe, Director
- Penske Logistics Europe, VP Operations
- PWC Logistics, Senior Manager – BD
- Schneider Logistics Europe, MD
- Thiel Lifestyle Logistics & Services, MD
- Tibbett & Britten, Chairman
- TNT, Business Development Director
- UPS Supply Chain Solutions, Corp. Strategy
- Vector SCM, Director – European Operations
- Wilson Logistics, CEO
- Wincanton, MD Europe

**Plus, both events have attracted a range of executives who represent the 3PL CUSTOMERS:**
- Kimberly Clark, Logistics Mgr
- LEGO System, Senior Director
- Lexmark, EMEA Logistics Ops Mgr
- Mattel, Senior Mgr DC Ops
- Nestle, Head-EU Transport Mgmt Centre
- Nike, 3PL Ops Director
- Nokia, Director Logistics APAC
- Nortel, Director-Logistics + Repairs
- Philips, EU Ops Mgr
- Siemens, Product Mgr
- Sonoco, Director Strategic Sourcing
- TVS Automotive, Head-Logistics
- Unilever, Distribution Ops Mgr

**The Expo + Networking Space**
The exhibition area is in the same room as the refreshment breaks next to both conference rooms… Every time we have a coffee break, your products and services are on display to the entire executive audience… This is your best chance to meet with and demonstrate your solutions to interested executives from industry leading companies with real buying power!

BOOK YOUR BOOTH TODAY BEFORE ALL THE SPOTS GO… ONLY 7 SPACES REMAIN!
WORKSHOP ONE: How to adapt and prosper as the European logistics landscape is transformed
Hear from Professor Van Breedam how the logistics market place is developing in Europe and how you can adapt to the latest trends to ensure your business stays one-step ahead of the competition. Not only has the enlargement of the EU affected economies and production – it has also impacted the logistics market by offering new geographical hotspots. What will be the focus for the 3PLs in Western Europe?
By attending this workshop manufacturers and retailers will find out what logistics services are available across the region and 3PLs will discover exactly what your customers are demanding now and in the future.
Prof. dr. Alex Van Breedam Managing Director Flanders Institute for Logistics – Vlaams Instituut voor de Logistiek (VIL)

WORKSHOP TWO: Top tips for selecting a 3PL provider and measuring 3PL performance
This is your chance to hear from an expert in the field and also gather a range of opinions from your peers in an informal, interactive setting. The theme of this workshop is designed to give 3PL users valuable tips and best practises for selecting and measuring 3PL service offerings to ensure that you make the right outsourcing decision. This will also highlight expert advice for 3PLs on what your customers are looking for when they assess their logistics outsourcing needs.
To ensure a successful relationship between logistics provider and client, both sides must also insist on comprehensive tools for measuring the results of the contact in terms of cost-savings, process improvements and also customer satisfaction.
Key tip for a 3PL user: ‘know what your supply chain or product will benefit from most before you start assessing 3PL providers’… key tip for a 3PL: ‘know what services you can truly deliver and start assessing 3PL providers’…
Johanna Ludvigsen Chief Research Officer Institute of Transport Economics

WORKSHOP THREE: Find out the latest IT developments for the logistics market and how to apply them to your business strategy
Dr Pflaum highlights the growing complexity of 3PL services and the new requirements for IT and software application systems – including an up-to-date description of ‘state of the art’ IT for the 3PL market so you can benchmark your current offering and plan ahead for your next investment.
Hear specific examples of common IT problems affecting logistics providers and their clients – and learn from expert advice on technical solutions that will improve your operations.
Dr. Alexander Pflaum Director of Department IT & SCM Cournhofer ATL

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LOGISTICS EXECUTIVES from leading MANUFACTURERS + RETAILERS offer their advice:
Jean Oberle VP Group Transportation & Warehousing Schneider Electric
Ian Taylor Logistics Operations Manager EMEA Hewlett Packard
John Legg VP International Distribution Liz Claiborne/NEXX
Marc Lundbommi Group Supply Chain Manager Logistics Rexam
Chris Pearce-Ramwell Head Of Transport Screwfix Direct
Genevieve Wood Logistics Continuous Improvement Manager BskyB
Jayaraman Arun Head of Logistics TVS Automotive Europe
Paolo Raguza Head Of Logistics Fresenius Medical Care
Steven Van Kerckhoven International Trade Manager EXEA Black + Decker
Stef De Bont General Manager Solectron Senior Executive MAQUET

SENIOR MANAGEMENT from 3PL PROVIDERS share their experiences:
John Patullo COO EMEA DHL Exel Supply Chain
Stewart Oades CEO Christian Salvesen
Andreas Janetzko Director of Global Strategic Accounts UPS Supply Chain Solutions
Axel Brunnee Global Business Development KN Leadlogistics
Jeremy Davidson Deputy Managing Director NYK Logistics Europe
Gert Askes Managing Director European Operations Menlo Worldwide Logistics
Friedhelm Schmitter Managing Director Thiel Lifestyle Logistics & Services
Paul Goldborough President of Business Development – Asia Hellmann Worldwide Logistics
Samuel Siddiqi Director Global Growth PWC Logistics
Johan Woumans Regional Director Belgium-North of France Dachser
Director of Supply Chain – Europe Schneider Logistics Europe
Hakan Nilsson CIO TNT Freight Management
Dave Emerson Director SEKO Worldwide UK
Richard Conneely Head of Transport Solutions Wincanton
Senior Executive APL Logistics
Mark Gieben VP DHL
Paul Corrigan Contract Manager Unipart
Ian Pemberton Operations Director – External Logistics NYK Logistics (UK)
Patrick van Son Director of Business Development TNT Benelux & Multi Country Logistics
Jos Kagenaar Manager Business Development TNT Inland
Manoella Willbaut Business Development EMEA DHL
Ozgur Soy Deputy GM Borusan Logistics
R S A Williams General Manager St. John Freight Systems Belgium
Tom Johnstone CEO SKF
Senior Executive Ahlers Logistics & Maritime Services

INDUSTRY EXPERTS share their knowledge:
Prof. dr. Alex Van Breedam MD Flanders Institute for Logistics
Christian Kille Group Manager Logistics Market Intelligence Cournhofer-Society
Derek Moore Associate Partner - Freight Logistics IBM
Juh Aamot Cross-Border Research Association
Ron Roest General Manager Logistics Holland International Distribution Council
Dr. Alexander Pflaum Director of Department IT & SCM Cournhofer ATL
Kieran Ring CEO Global Institute of Logistics
Johanna Ludvigsen Chief Research Officer Institute of Transport Economics
Kenneth Tse Director + GM
Yantian International Container Terminals Ltd
Garry Mansell Managing Director Freight Traders Ltd.
John Manners-Bell Director Transport Intelligence
Marc Cartagone CEO Sqp
Beat Schlumpf Global Shipping and Logistics Consulting
BKS Expert for Logistics Systems

61 Confirmed Speakers
Zsolt Marton Deputy CEO Eurogate Logistics
Bjoern Rath Head of IT Product Management DHL Management (Switzerland)
Alan Devine Operations Director Caudwell Logistics
Ambro van Oosterhout Supply Chain Manager Janssen Logistics

MAKE THE MOST OF THE INDUSTRY NETWORKING PARTY!
Get out of the office the day before the Summit to join the workshops and... perhaps most importantly... meet your fellow attendees in a relaxed setting the night before the big day!
Catch up with colleagues and old friends, meet fellow attendees and speakers and make important business contacts at this Industry Networking Party on Monday 3rd October!
Wednesday October 4th: Morning Sessions

**DHL Exel Presentation:** Hear from Europe’s largest logistics company about their current strategies, latest customer initiatives and their plans for global growth

John Patullo COO EMEA DHL Exel Supply Chain

**Shipper Presentation:** What are the key drivers when selecting a 3PL provider?
- Hear first-hand from a company with sales over $13 billion – what a 3PL user looks for in a logistics provider
- As a 3PL, how can you use this valuable information to improve your offering and sales pitch?
- As a 3PL user, take away these helpful hints for assessing and finally choosing your own 3PL

Jean Oberle VP Group Transportation & Warehousing Schneider Electric

**Menlo Joint Case Study:** Building a successful relationship

Gert Askes Managing Director European Operations Menlo Worldwide Logistics

Senior Executive MAQUET

**Panel Discussion: The challenges Europe faces through 3PL consolidation**

- Integrating systems, people, cultures and much more
- Keeping the day-to-day operations on track
- Is consolidation good for everybody – and what is the impact for the industry?

Andreas Janetzko Director of Global Strategic Accounts UPS Supply Chain Solutions

**Panel Discussion:** Assess the key drivers and barriers when selecting a 3PL

- Hear from a panel with first-hand knowledge of tenders and contracts, what to consider when negotiating to ensure a realistic cost-structure for both the 3PL and the 3PL user
- Tips on ways to improve your contracts and potential problems to anticipate – such as wage increases, risk and liabilities
- If this is your first 3PL contract, make sure you go to the table with a real understanding of contract negotiation and be sure to use this advice when renewing future contracts!

Jean Oberle VP Group Transportation & Warehousing Schneider Electric

Johan Woumans Regional Director Belgium – North France Dachser

Daan Snaathorst Managing Director Mercator Logistics

Pascal Herroelen Logistics Consultant

Jon Berge CEO Stayer

**Panel Discussion: Assess the key drivers and barriers when selecting a 3PL**

**Panel Discussion:** How to assess the performance of your 3PLs and measure the overall success of your outsourcing decision

- How much should you pay your 3PL? – how can you ensure you don’t pay more than the market rate?
- Learn how to secure further cost savings from your 3PLs without hindering service or damaging your relationship with them
- Top tips on measuring 3PL performance by taking into account cost and service. Best practices on service costs, customer satisfaction, on-time delivery, handling and routing, and systems performance when assessing your overall 3PL performance
- Practical advice on assessing a logistics service provider network where more than one 3PL is involved

Ozgur Soy Deputy GM Borusan Logistics

Chris Sturman Principal Christopher J Sturman

**Panel Discussion:** Sourcing in China – the supply chain challenges and opportunities!

- This session hosted by the Global Institute of Logistics Council & Marketing Manager Wilmer Aguilera Executive Director GIL Maritime Logistics Council & Marketing Manager

Yantian International Container Terminals

Paul Goldsborough Executive Director GIL Maritime Logistics Council & President-Business Development – Asia Hellmann Worldwide

Marc Castagnet Executive Director GIL Maritime Logistics Council & CEO SGT

Kieran Ring CEO Global Institute of Logistics

**VISIT www.eyefortransport.com/eu3pl for the latest Summit information!**
Wednesday October 4th: Afternoon Sessions

Choose from 3 different tracks – or mix between them all:

- **TRACK ONE** – join the main conference room for industry presentations and panel debates
- **TRACK TWO** – select specific attendees to meet at scheduled one to one meetings
- **TRACK THREE** – join interactive roundtables to discuss a focused topic

Remember that space on the roundtables is limited and meetings are restricted by time – so sign up early to confirm your first choices and take advantage of these afternoon opportunities!

1. **TRACK 3**
   
   **14 Interactive Discussion Points:**
   This is your chance to ask questions and get advice on key concerns from conference speakers and fellow attendees. Each roundtable discussion will last for approximately 1 hour and will be completely interactive!

   1. **Specific considerations for automotive logistics:**
      Auto manufacturers are moving production to emerging markets to cope with rising wages in the original EU member countries, which are growing for a shift in logistics centres and networks across CEE markets: 3PLs and their automotive clients need to be aware of these trends and position their strategies to benefit from cost-reductions.

   2. **Specific considerations for FMCG logistics:**
      This fast-paced vertical requires a logistics set-up that can adapt quickly to changes in inventory requirements as well as ensuring a totally visible supply chain. What are the key tips for improving the logistics operations for the FMCG market and how can you keep ahead of the competition to ensure profits?

   3. **Specific considerations for pharma, chemicals and hazardous materials logistics:**
      An experienced 3PL – with systems in place to cope with demanding regulations and very strict compliance codes – can make the logistics of a pharma, chemical or HazMat supply chain far more efficient, cost-effective and visible but both sides of the partnership must stay ahead of trends such as low-cost country sourcing and upcoming rules governing the movement of goods.

   4. **Specific considerations for fresh food logistics:**
      Getting fresh produce to consumers and end-users requires ‘fresh’ ideas from the 3PL industry. Discuss best practice for implementing the latest technology for refrigerated goods, complying with regulations for moving food + beverage products as well as innovative approaches to supply chain efficiency, cost-saving and visibility.

   5. **Specific considerations for hi-tech + electronic logistics:**
      Dealing with hi-tech supply chains means implementing a truly ‘just-in-time’ service – which means coping with a highly complex logistics operation. Outsourcing to a 3PL with strong skills in this area can bring significant rewards… and a recent survey by datamonitor expects to see 2/3 of the planned EUR600 million spend in this sector to go to 3PLs by 2010.

   6. **Challenges and opportunities within the China logistics market:**
      According to statistics revealed in a recent EFT Research paper, by 2010 China’s economy is expected to be double that of Germany and, if industry predictions prove to be accurate, China will see China overtaking Japan as the world’s second largest economy with a GDP approaching US$4.5 trillion… and by 2010, it is estimated that the Chinese logistics market will be worth more than 1 trillion Yuan (US$120 billion!). With figure like this can you afford to sit on the fence and wait to see what happens?

   7. **Challenges and opportunities within the India logistics market:**
      India’s total global exports during February 2006 were valued at US$7.8 billion, with imports valued at US$11 billion. To deal with this increased trade, the Indian government is making great efforts to improve trade by expanding port operations, investing in highway projects, and improving the rail network… and has announced plans to invest $16 billion in transport infrastructure by 2010. Make sure you have all the latest news on this growing Asian giant to put you ahead of the competition!

   8. **Challenges and opportunities for logistics networks in the Middle East region:**
      The Middle East’s total global exports of merchandise in 2004 were valued at US$390 billion, a year-on-year increase of 20%. Of these exports, half of these exports were destined for Asia (US$193 billion). Europe (16.4%) and North America (14.1%) were the Middle East’s second and third biggest export trading partners, with US$64 billion and US$55 billion respectively. The Middle East’s biggest trading partners in 2004 in respect of imports were Europe (42.7%), Asia (30.7%) and North America (10.3%). With these figures on the increase, can you afford to miss out?

**NEW FOR 2006!**

**SKF Case Study:** From local shipping departments to one in-house global logistics supplier

- Find out how SKF faced the challenge of distribution on a global scale – the different issues they’ve encountered over the past 30 years
- Get their insights into the logistics challenges that lie ahead for the next 12 months!

Tom Johnstone CEO SKF

**Menlo Presentation:** Implementing lean logistics to bring clients real cost-savings

Gert Askes Managing Director Europe Operations Menlo Worldwide Logistics

Panel Discussion: Lean Logistics – as a 3PL how can you offer this to clients and as a 3PL user how can this be applied to your supply chain

- Shippers across all industry sectors, their 3PL providers and every party involved in the supply chain are aware of constant pressures to reduce and balance cost, time and inventory on a domestic level… even more so for global supply chains. In an ideal situation the inventory would be pulled, not pushed, through the supply chain – which is where the lean logistics strategy fits in to remove unnecessary inventory (or waste).
- How can this model be adapted to your supply chain and as a 3PL how can you offer this ‘holy grail’ of services to a potential customer?

Gert Askes Managing Director Europe Operations Menlo Worldwide Logistics

**Ambro van Oosterhout Supply Chain Manager Janssen Logistics**

**Catherine McDermott Director – Logistics Crimson & Co**

**TNT Case Study:** Growing in emerging markets

- Setting up shop in an emerging logistics market
- Comparing the managerial issues of Western-Europe vs. emerging markets
- Technology vs. pragmatism: striking a balance

Patrick van Son Director Business Development TNT Benelux & Multi-Country

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- Get their insights into the logistics challenges that lie ahead for the next 12 months!

Tom Johnstone CEO SKF

**NEW FOR 2006!**

**BOOK YOUR PLACE AT THE INDUSTRY GALA DINNER – TUESDAY 27TH OCT**

Having spent a day analysing and assessing industry issues, you are invited to join the 3PL gala dinner and networking function where you can relax among colleagues and peers, discuss business opportunities AND hear the latest announcements within the industry. Places are on a first come first served basis and will take place in the impressive conference venue hotel ballroom. Delegates can also secure additional promotion at this evening function by sponsoring a table. Simply contact eyedontransport for more information today!

GET THE LATEST UPDATES AND STANDARDS IN CARGO SECURITY AND RISK MANAGEMENT

Hear about the latest cutting edge technologies, the difficult issue of responsibility (who should cover the costs for cargo security) and the very real importance of personnel awareness/training within your organization… as well as updates on government regulations, ISO codes, anti-terrorist strategies and loss prevention techniques.

Leaders for these interactive discussions are being updated online!
Thursday October 5th: Morning + Afternoon Sessions

**Christian Salvesen Case Study: Update on business strategy from this major European logistics provider – employing some 15,000 staff and operating in 8 countries**
With customers that include Asda, Auchan, Avery Dennison, British Airways, Carrefour, Dow Chemical, Dunlop, DuPont, ExxonMobil, Ford, Heinz, JCB, Marks & Spencer, Mars, Mazda, McCain, Michelin, Morrisons, Nestlé, Nissan, PepsiCo, Pilsbury, PizzaExpress, Porsche, Proctor & Gamble, Renault, Shell, Smurfit, Tesco, Tessenderlo, Texaco, Toyota, Unilever, Vauxhall, Volvo – and many more: what can you learn from their recent experiences and future strategies
Stewart Oades CEO Christian Salvesen

**Hewlett Packard Presentation: Practical tips on how to achieve a perfect 3PL partnership**
• Hear how HP is looking to further enhance its 3PL management across 3 functions, Transportation, Customs and Warehousing
Ian Taylor Logistics Operations Manager EMEA Hewlett Packard

**Thiel Case Study: Controlling the supply chain within the fashion + lifestyle industry**
• With sales of EUR 1.8 billion in 2005 for the Thiel group and approximately 8,000 staff in 41 countries – this is your chance to hear lessons learnt and initiatives for the future
Thiel Logistic operates across all the main European markets as well as in all the important procurement and sales markets worldwide – with 400+ locations across all continents. Get top tips on operating in the challenging world of fashion and lifestyle supply chains
Friedhelm Schmitter Managing Director Thiel Lifestyle Logistics & Service

**TRACK B**

**Panel Discussion: Best practice on tailoring 3PL services to individual customer needs or a niche market**
• 3PL providers: how can you ensure you maintain a strong niche specialty?
• 3PL users: ensure your 3PL contract remains flexible to how is consolidation affecting 3PL customers across Europe?
• What does the future hold in this region and how can you plan for this?
• What new opportunities are opening up to smaller 3PLs as a result of consolidation… How can 3PL users choose the right sized 3PL for their needs?
PaoLugusag Head of Logistics Fresenius Medical Care

**Panel Discussion: Reverse logistics – latest trends and lessons in reverse logistics**
• As a 3PL what unique skills does this require and as a 3PL user when should you outsource this element of your supply chain to a 3PL?
Prof. dr. Alex Van Breemad, Managing Director, Flanders Institute for Logistics – Vlaams Instituut voor de Logistiek (VIL)

**Track A**

**Presentation: Overview of the DHL strategy for developing networks in emerging markets**
Manoilla Willibaut Business Development EMEA DHL
Fathi Tlatli Industry Sales Director EMEA DHL

**Presentation: How can your 3PL provider assist you when entering new markets – and be innovative in developing your pan-European and global networks**
Steven Van Kerckhoven International Trade Manager EXEA Black + Decker

**Presentation: Assessing the business opportunities in emerging markets – with a special focus on opportunities and challenges in India**
With India’s international trade on the increase… the transportation and logistics market has been valued at around US$14 billion in 2004, and is expected to grow at a compound annual growth rate of around 7%
• How can you profit from this region as a 3PL provider and how can 3PL users select the best provider in this region?
R S A Williams General Manager St. John Freight Systems Belgium

**Panel Discussion: Where are the new geographical hot-spots? Comparing Asian giants such as China & India with CEE, Russia and the Middle East**
• Discover the proven strategies and tactics you need to profit from globalisation
• Find out how to effectively manage disparate customs and compliance regimes
• Get the low-down on establishing successful joint ventures & local partnerships around the Globe
• Proven methods to overcome cultural barriers and ensure a smooth training process and systems integration
R S A Williams General Manager St. John Freight Systems Belgium
Senior Executive Ahlers Logistics and Maritime Services
John Manners-Bell Director Transport Intelligence

**APL Logistics Case Study: Update on APL Logistics current outlook + future strategy**
• With over 150 years in the business, find out what APL – a wholly owned subsidiary of Singapore-based Neptune Orient Lines – has learnt and experienced
• Hear the lessons learned that have helped them and their customers venture into new territories, explore new business opportunities and grow in already developed markets
Senior Executive APL Logistics

**Panel Discussion: Reverse logistics – latest trends and lessons in reverse logistics**
• As a 3PL what unique skills does this require and as a 3PL user when should you outsource this element of your supply chain to a 3PL?
Prof. dr. Alex Van Breemad, Managing Director, Flanders Institute for Logistics – Vlaams Instituut voor de Logistiek (VIL)

**Track B**

**Shopper Presentation: How is consolidation impacting within the European logistics market impacting business strategies**
• What is 3PL consolidation affecting 3PL customers across Europe?
• What does the future hold in this region and how can you plan for this?
• What new opportunities are opening up to smaller 3PLs as a result of consolidation… How can 3PL users choose the right sized 3PL for their needs?
PaoLugusag Head of Logistics Fresenius Medical Care

**Panel Discussion: Best practice on tailoring 3PL services to individual customer needs or a niche market**
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R S A Williams General Manager St. John Freight Systems Belgium
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CANCELLATIONS:

Cancellations received by email or before 1st September are refundable. For cancellations received after 1st September 2006 you will receive a 100% credit to be used at another eyefortransport conference. If you do not cancel and do not attend the conference you are still responsible for payment. You may substitute the name of a colleague at any time.

3 Key Reasons to attend this event in 2006:

• Increase your knowledge of the latest logistics service trends, geographical opportunities, IT developments, security regulations and which value-added services are right for your business

• Benchmark and Network: As a 3PL this is your No.1 opportunity to benchmark your services against your peers and meet with potential customers who are looking to outsource their logistics operations… For 3PL users this is your best chance to hear what services are out there and gather all the information you need to make informed decisions, while meeting face-to-face with potential providers

• Unrivalled networking opportunities at the premier strategic event for 3PL management and logistics executives – with over 10 hours scheduled into the programme! Engage with like-minded people & get all the answers you need!

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Fourth European 3PL Summit
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