

Koers houden en sterker worden

Vereniging Logistiek Management

Najaarscongres 2009

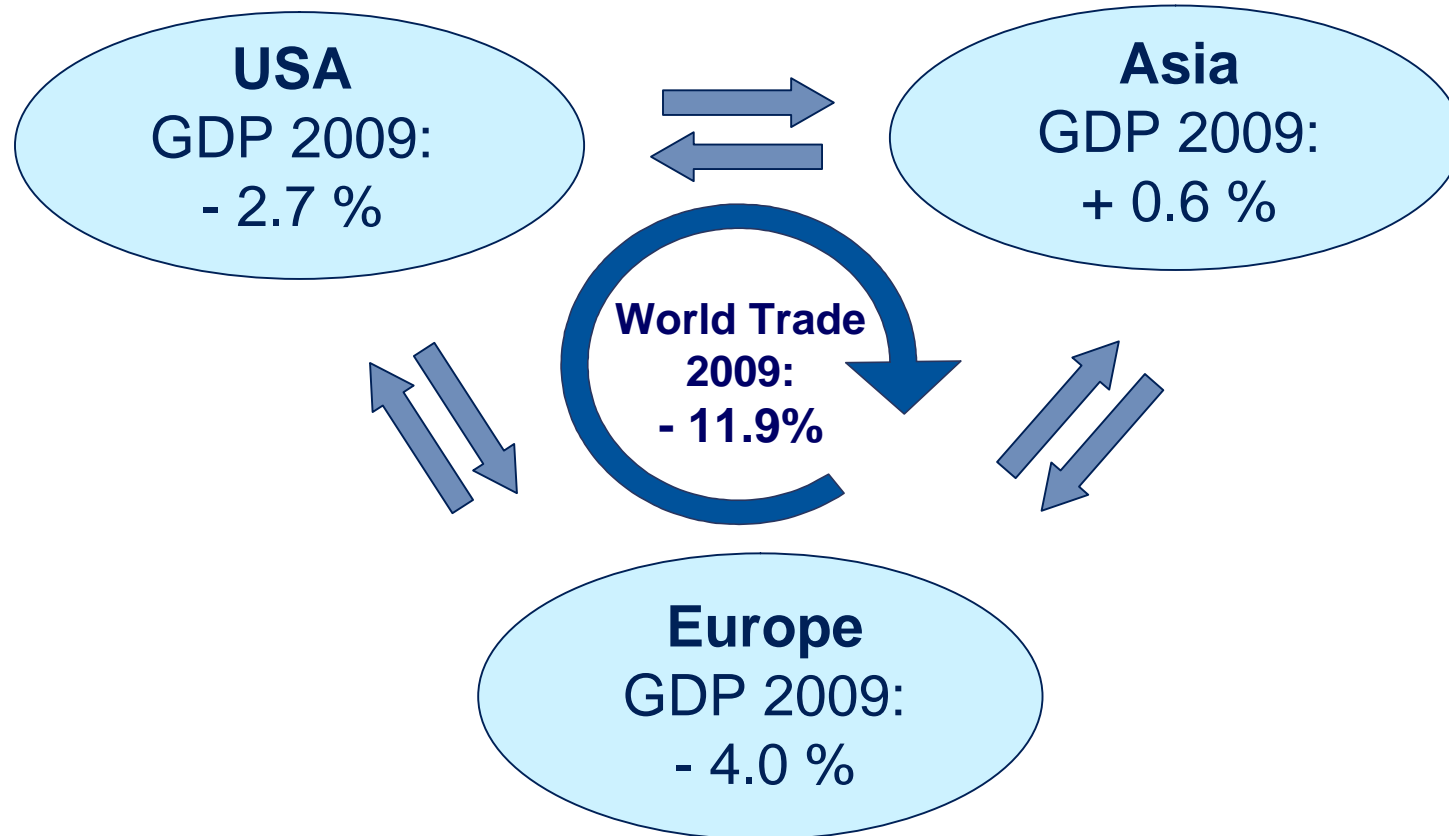
Michael Wisbrun

Divisiedirecteur KLM Cargo

Chairman of Joint AFKL Cargo Management Committee

Koers houden

wereldwijde economische crisis

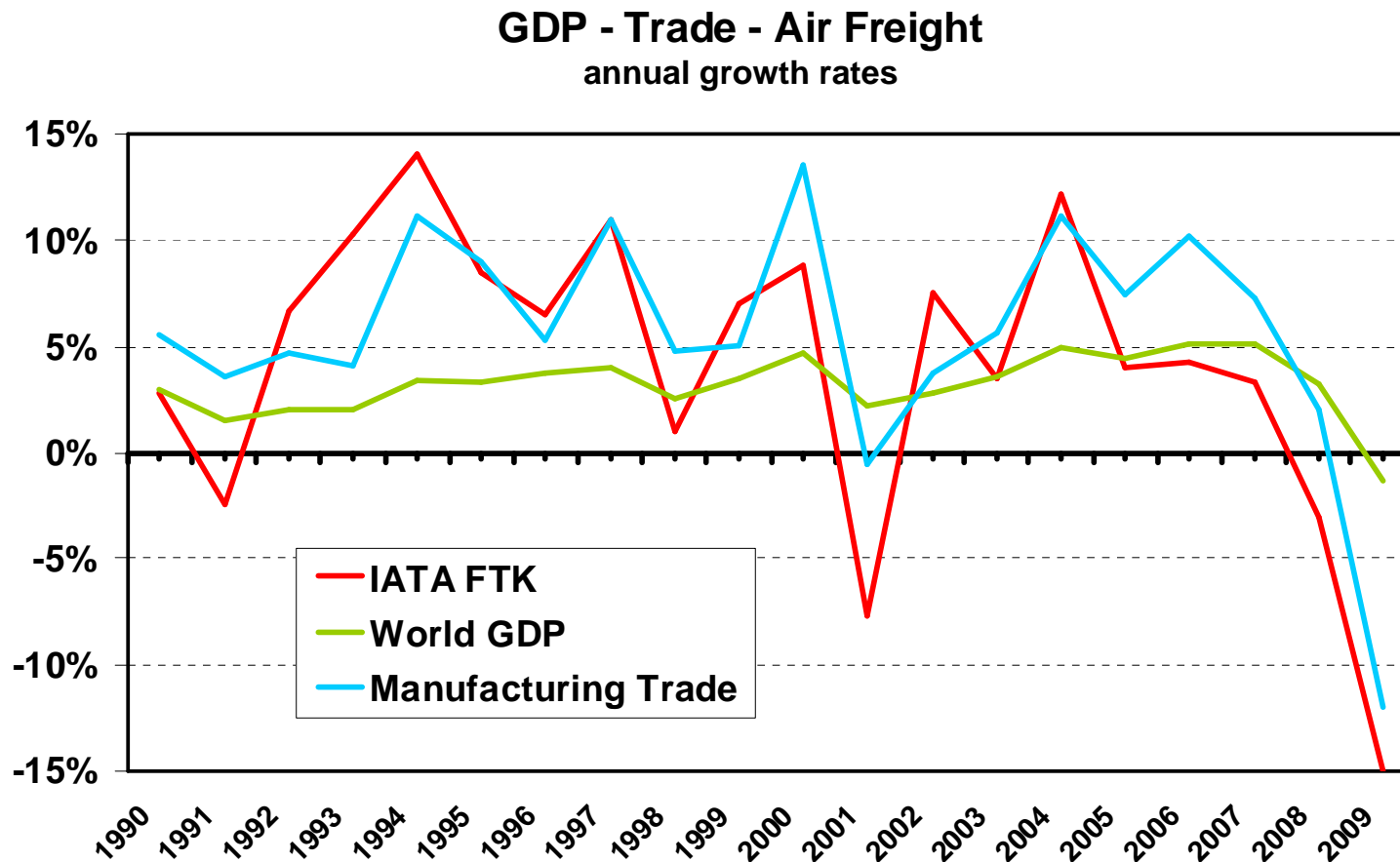


Handel is de moeder van het vervoer ...

Ref.: IMF forecast

Koers houden

crisis in de luchtvrachtindustrie



Enorme daling in vraag naar luchtvracht

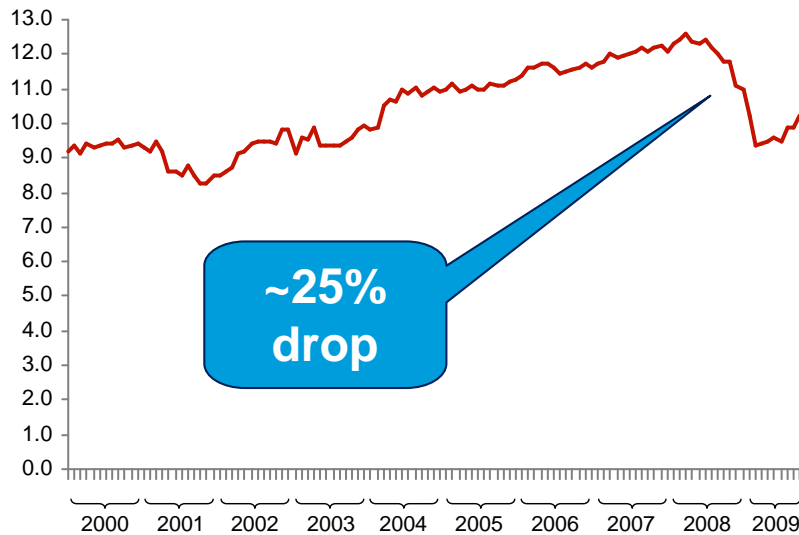
Koers houden crisis in de luchtvrachtindustrie



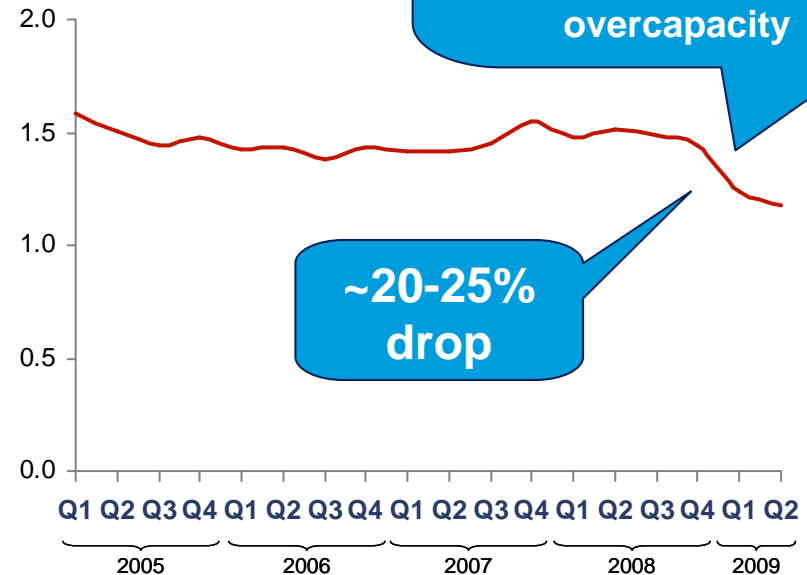
Crisis brought volumes back to 2004 levels...

...and caused yield decline to accelerate

International FTKs (Billion per month)



Air freight yields US\$ per kilo



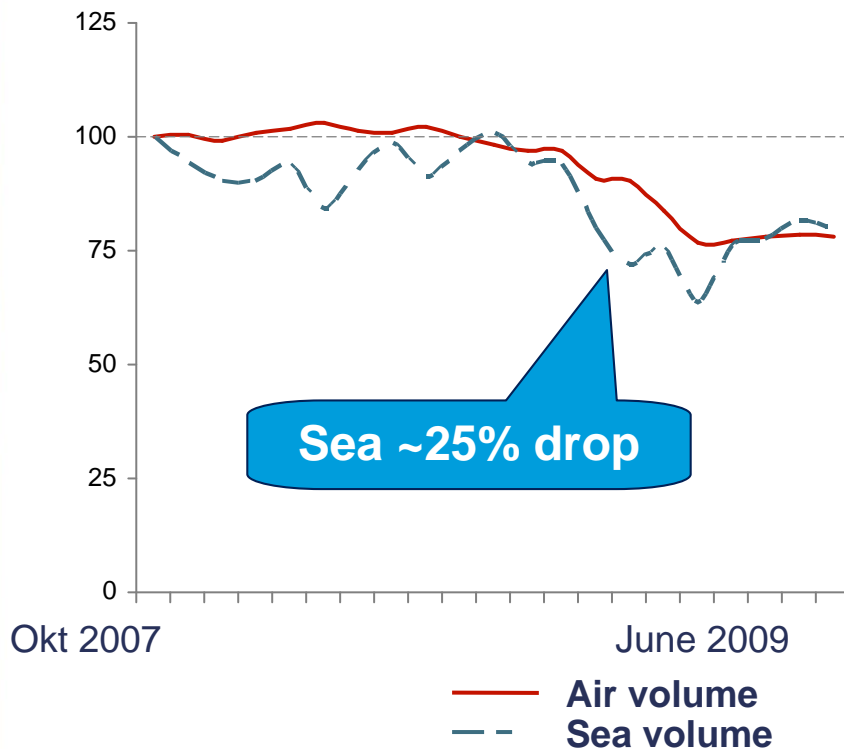
Enorme daling in inkomsten

Koers houden crisis in de zeevrachtindustrie



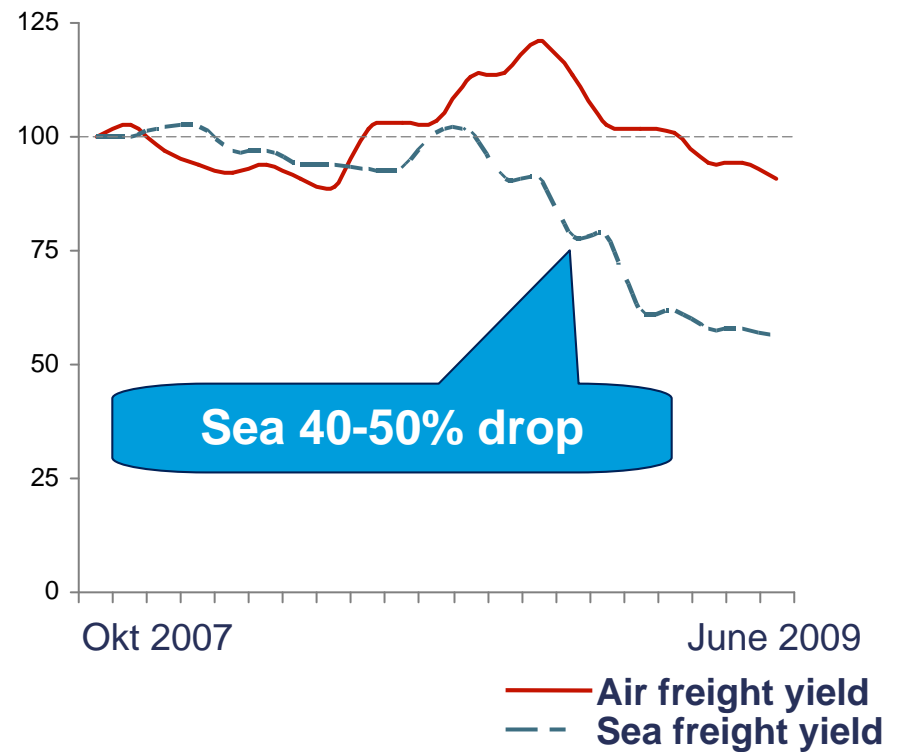
Volume drops relatively similar..

Index (October 2007=100)



... But sea cargo yields under even more pressure

Index (October 2007=100)



Niet alleen bij luchtvracht ...

Koers houden

acties AFKL cargo



We needed to act fast:

- Capacity reduction & Network restructuring
 - Overall capacity reduced with ~20%
 - Strong reduction of freighter flights
 - Reduction of overlap in network
- Focus on our customers
 - Quality of services
 - Customer relations
- Managing down the cost base
- Revenue enhancement
 - Price increase per October 2009
- Focus on cash management
 - Limit investments
 - Day-to-day flight schedule optimization

- we maintained our market share
- we protected the quality of our network

We concentreren ons op vandaag, om een platform voor de toekomst veilig te stellen

Koers houden acties AFKL cargo

We focus, but do not stop innovation:

- CSR
 - leading airline in Dow Jones sustainability index
 - CO2 neutral growth
 - transparency, compensation
- E-freight development
 - paperless freight
- Cargo 2000
 - transparency in the chain
- Security/seamless cargo
 - SPL cargo checkpoint

CO₂mpensation



The image shows a screenshot of a CO2 compensation calculator interface. The interface is overlaid on a background of green bamboo stalks. The form includes the following fields and options:

- From:** A text input field.
- Via/to:** A text input field.
- To:** A text input field.
- Actual weight:** A text input field followed by "KG".
- Mode Selection:** Two sets of radio buttons. The first set is for the "Via/to" field, and the second is for the "To" field. Each set has "Air" and "Truck" options.
- Calculate:** A blue button with the text "CALCULATE" and a right-pointing arrow.

*We blijven investeren
in innovatie:
in kleine praktische
stappen*

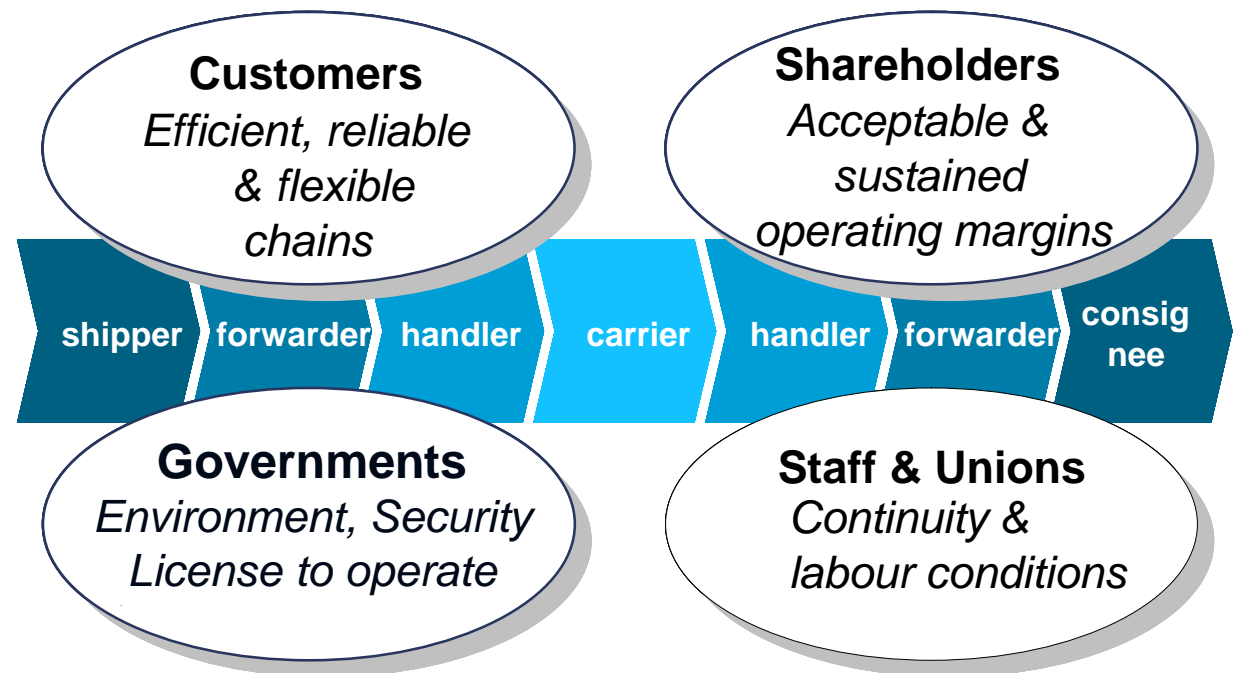
Sterker worden

leren omgaan met complexiteit

We are part the world's supply chains.

We deal with many different

- Stakeholders
- Nationalities
- Legal systems
- Bottom lines
- Processes
- IT-systems
- Procedures



Succes is niet alleen afhankelijk van onze concepten, maar ook van ons vermogen te implementeren

Sterker worden stellingen



- *Innovatie verbindt duurzaamheid met efficiëntie*
- *Het managen van duurzaamheid is het managen van dilemma's*
- *Elkaar vasthouden is beter dan elkaar vastzetten*

*We hebben nog een wereld te winnen
door het verbeteren van onze implementatiekracht ...*

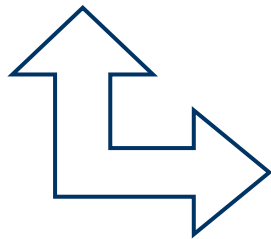
Sterker worden

Nederland heeft een sterke uitgangspositie



Europe:

- A strong unified Europe to face global competition
- Creating “European Champions”
- European regions competing for economic activities
- ***Gateways and logistic players are key assets for economic development***



The Netherlands, Gateway to Europe:

- Strong mainports
- Multimodal infrastructure
- Strong Logistics Players
- Growth potential

Maar onze positie is niet vanzelfsprekend...

Sterker worden

Onze positie versterken



AFKL is a strong home carrier

- A strong pan-European company
 - *1 Holding, 2 Airlines, 3 Businesses*
- Further synergy and cost-savings
- Investment in innovation and CSR
- Network specialization and restructuring
- Flexibilization of freighter fleet

SPL is a strong home base

- In top 4 of European cargo hubs
- Strengthening SPL as a multimodal logistic hub
 - *Connecting strong intercontinental network with strong European network*
- Building attractive “market place” for network forwarders
- Building "seamless" cargo handling concept

*Samen maken we
Schiphol tot de
"best in class"
European
cargo hub*

Sterker worden

Onze positie versterken

Strengthening The Netherlands, as Gateway to Europe:

- Competitive
 - *Strong logistic players*
 - *Profitable & investing in innovation*
- Green
 - *More reliable, more safe, more green ...*
 - *Social responsibility AND unique selling point*
- Integrated
 - *National ambition and national innovation program*
 - *International chain approach*
 - *Smart cooperation*



Onze inzet voor de toekomst ...

Onze logistieke verantwoordelijkheden voor de toekomst



Koers houden ...

- wereldwijde crisis onder ogen zien
- focus op vandaag om platform voor morgen veilig te stellen
- blijven investeren in innovatie: kleine praktische stappen

en sterker worden ...

- complexiteit onder ogen zien
- implementatiekracht versterken
- versterk gateway-functie NL: competitive, green, integrated
- wij zetten in op SPL als "best in class" cargo knooppunt

The end



Thank you.