



Global Logistics Provider
Supporting Your Business Growth

Nippon Express de Espana, S.A.

Global Logistics Strategy

2014.09.17 in Tokyo

Index

1. Presence of Nippon Express
2. General Information (Logistics in Spain)
3. Advantage of Spain
4. Our Service in Spain
5. Our Strategy

Nippon Express Global Network

Europe/ME/Africa
 89 locations
 2,416 employees
 390,721 m2 warehouse

East Asia
 127 locations
 6,089 employees
 635,256 m2 warehouse

South Asia-Oceania
 139 locations
 7,662 employees
 635,612 m2 warehouse

Americas
 125 locations
 2,461 employees
 523,760 m2 warehouse

40 countries 228 cities 480 locations 18,693 employees
 (As of June 30, 2014 (Japan is not included))

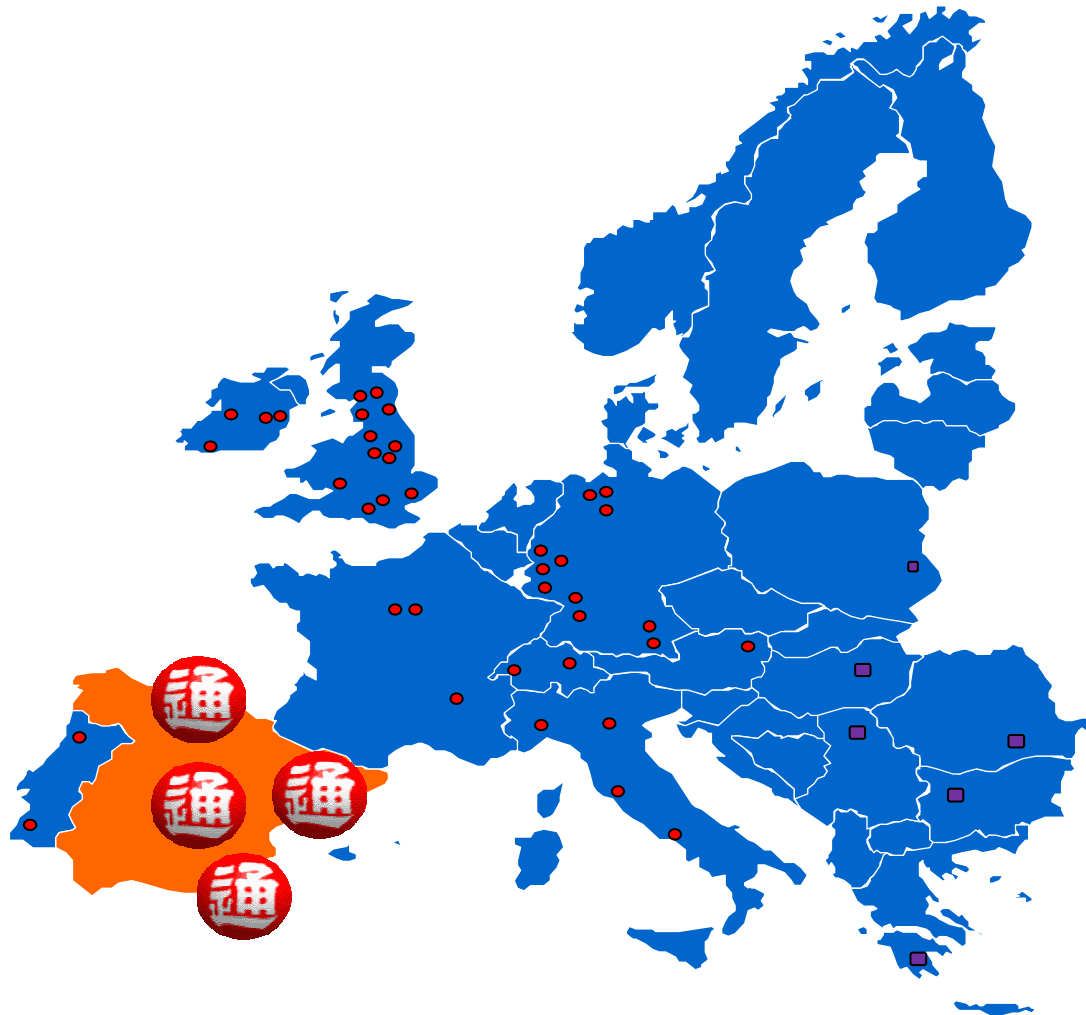
Company Information (As of March 31, 2014)

Name : Nippon Express Co., Ltd.
Headquarters : 1-9-3, Higashi Shimbashi,
 Minato-ku, Tokyo 105-8322, Japan
Formal establishment : October 1, 1937
Paid-in capital : ¥70,175 million
Employees : 33,153
URL : <http://www.nipponexpress.com/>



本社ビル 港区東新橋（汐留シオサイト）※写真中央

Nippon Express Group in Europe



- ✓ Holding Company
- ✓ Head Quarters at Dusseldorf
- ✓ Nippon Express Germany
- ✓ Nippon Express UK
- ✓ Nippon Express Ireland
- ✓ Nippon Express Belgium
- ✓ Nippon Express France
- ✓ Nippon Express Italy
- ✓ Nippon Express Switzerland
- ✓ Nippon Express Spain
- ✓ Nippon Express Portugal
- ✓ Nippon Express Istanbul
- ✓ Nippon Express Russia
- ✓ Nippon Express Poland
- ✓ Nippon Express Netherlands
- ✓ Nippon Express Austria
- ✓ Nippon Express Hungary
- ✓ Nippon Express Czech Rep
- ✓ Franco Vago S.p.a.

Services provided by Nippon Express Europe



Air Freight



Ocean Freight



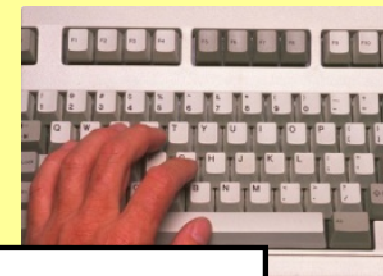
Road Freight



Logistics / Distribution



Customs Clearance



High Quality / Low Price

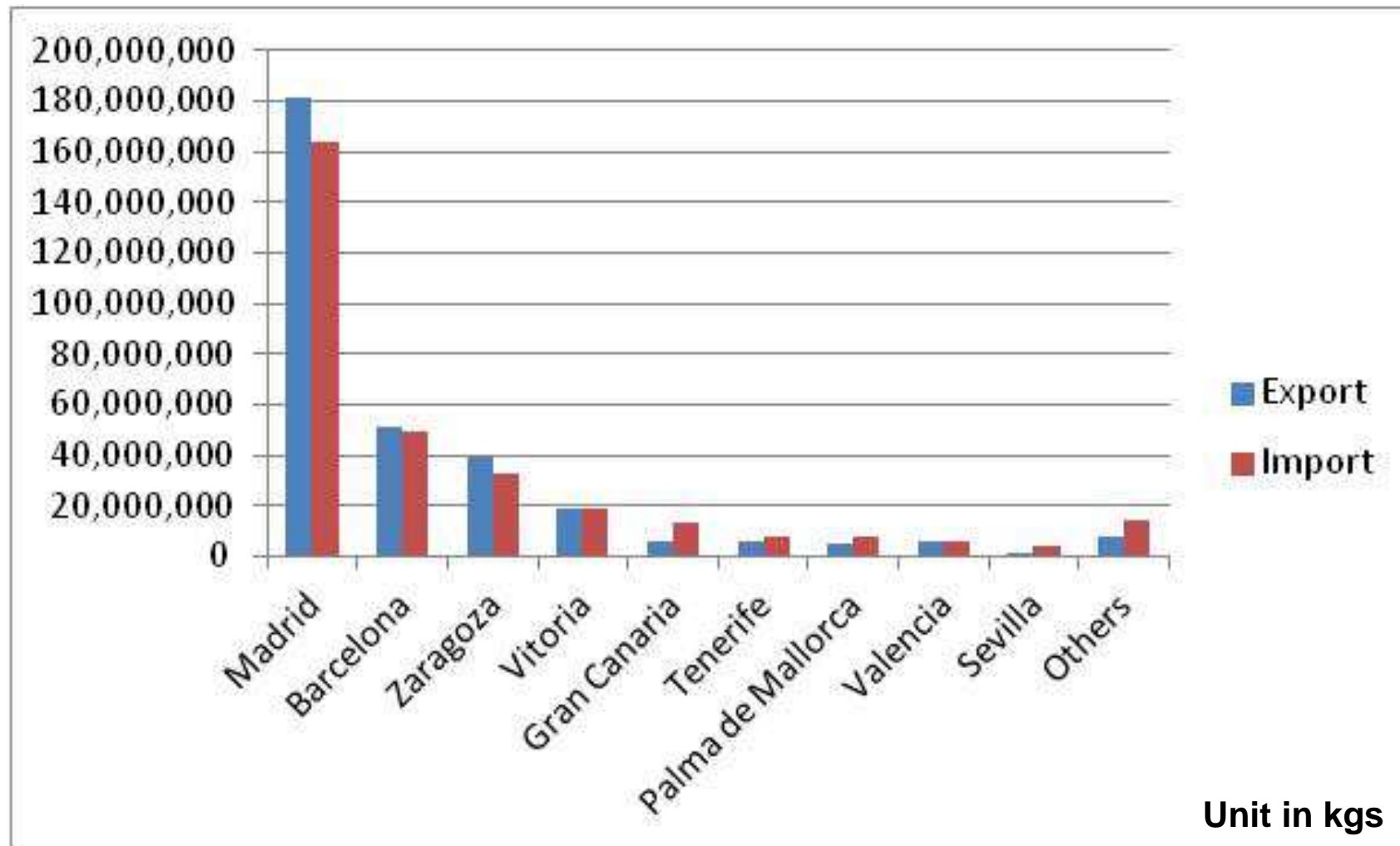
Supply Chain Management

Nippon Express in Spain



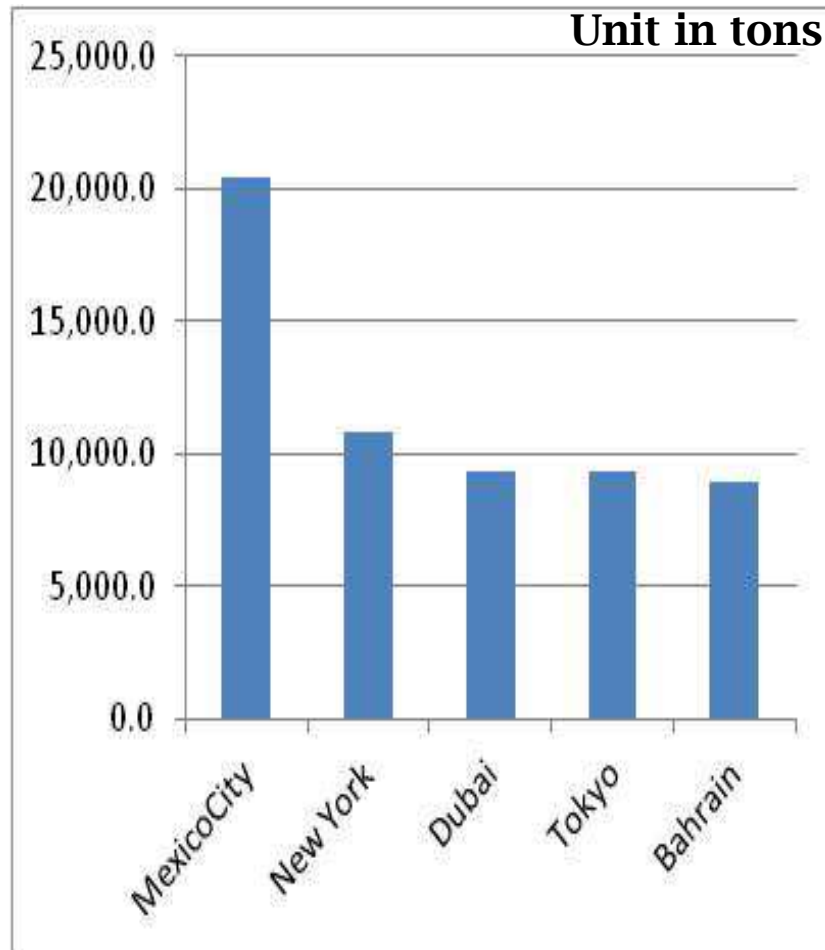
- ✓ Established in Spain in 1988
- ✓ Head Office at Madrid
- ✓ 3 branches & 1 group company
- ✓ 88 employees
- ✓ Warehouse space of 4,841 m² (Own Bonded Warehouse)
- ✓ No.1 Japanese Forwarder in Spain
- ✓ 2013 Turnover : EUR 100 million

Air Cargo Volume of Main Airport in Spain / 2013

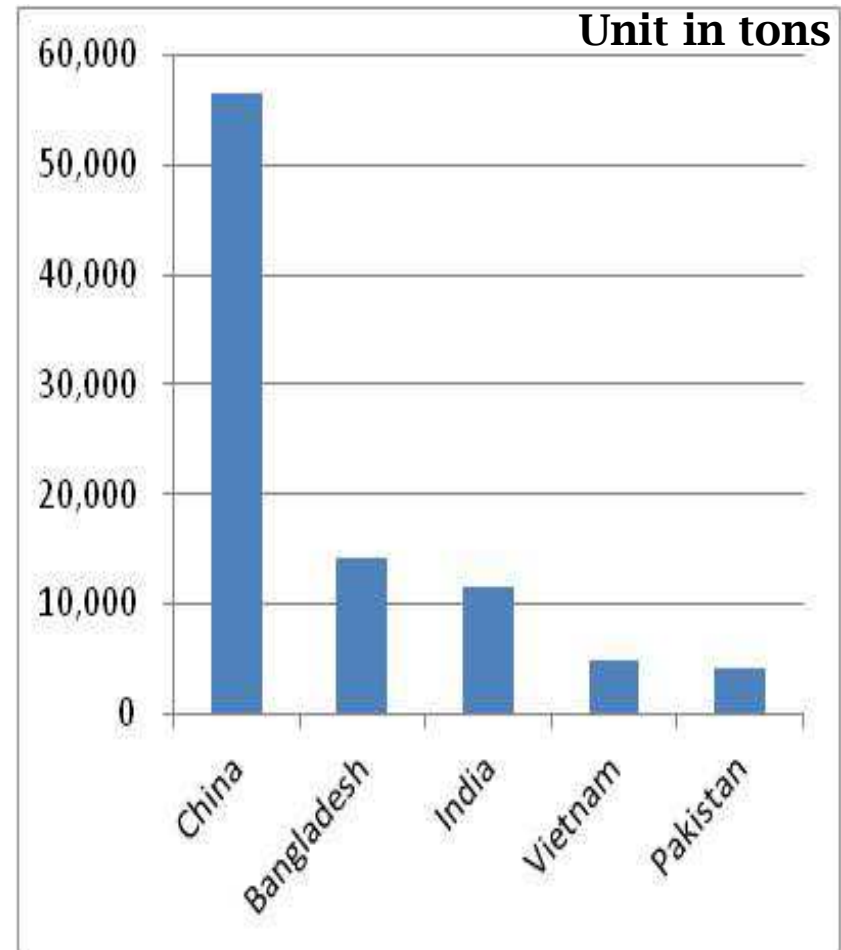


Source : Aena Aeropuertos

Air Cargo Top 5 Trade lanes from / to Spain

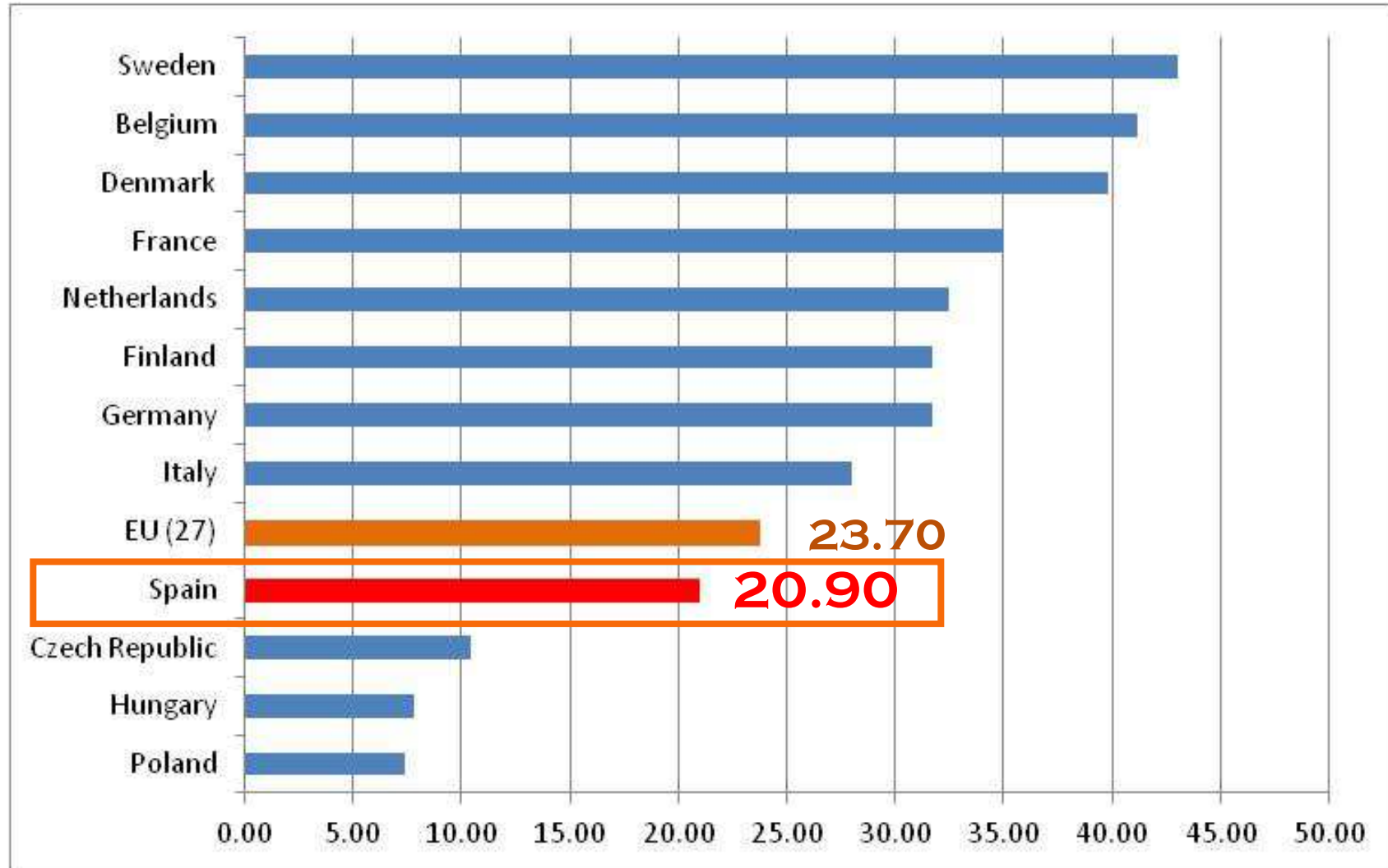


Export **from Spain** in 2013
Source : IATA



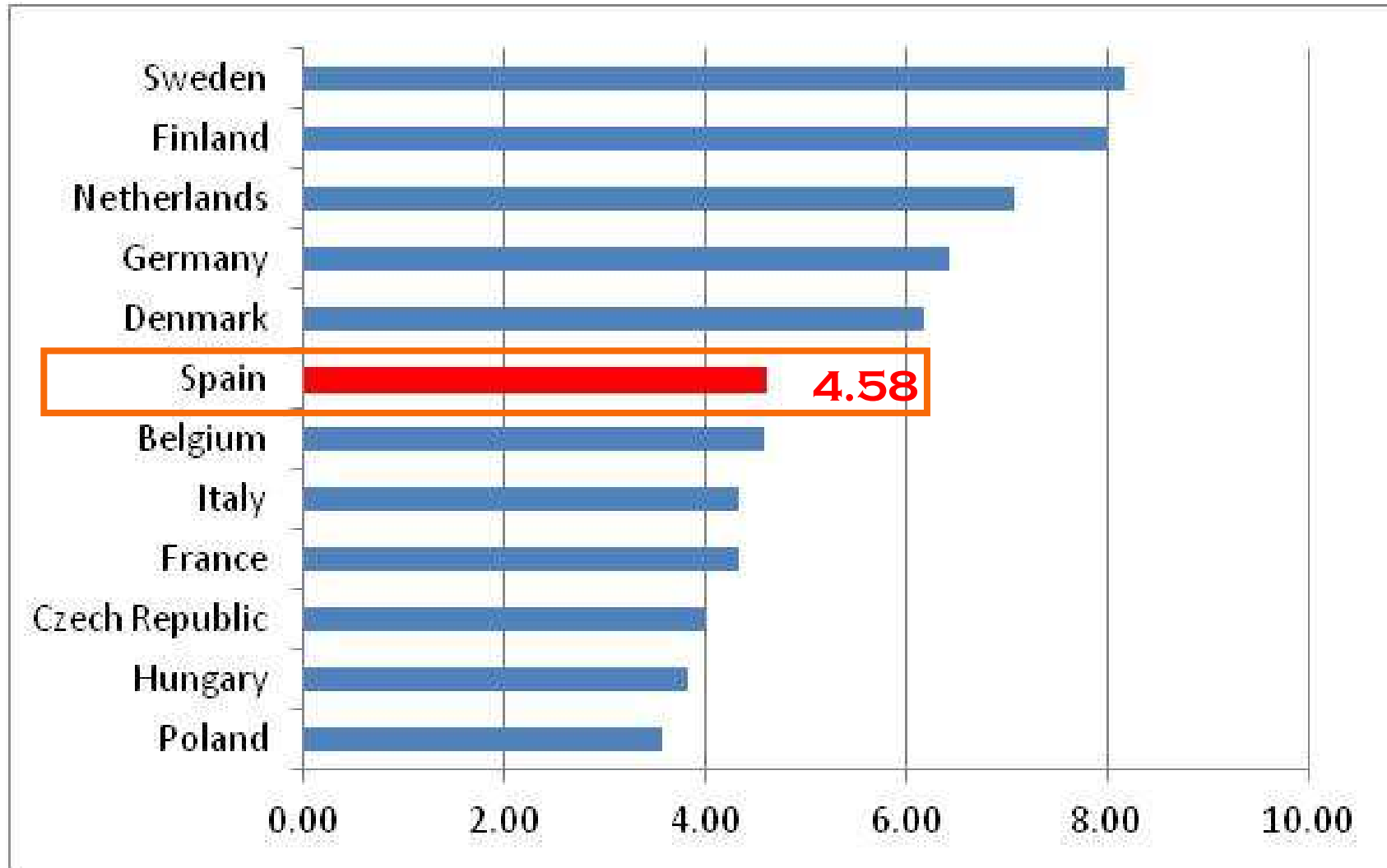
Import **to Spain** in 2013
Source : Eurostat

Comparison of the Labor Cost in 2013



Per Hour in EUR // Source : Eurostat

Comparison of the warehouse Rent in 2013



Per sqm in EUR // Currency is converted in EUR // Source : Jones Lang Lasalle

Nippon Express de España, S.A.

Leading company

of International Freight Forwarders

in Spain

Advantage of Spain from SCM Logistics point of views

1. Geography

Door to Northern African area Collaboration
with South European Countries

2. Communication between LATAM

The Gateway to / from Latin American Countries
especially Mexico

3. Fiscal Representative Program

Minimum investment to expand business using
by Fiscal Rep Program in Spain

Advantage of Geographical location Door to/from Morocco, Northern Africa to EU

Trade partners

Export ex Morocco

1. France
2. **Spain**

Import to Morocco

1. **Spain**
2. France

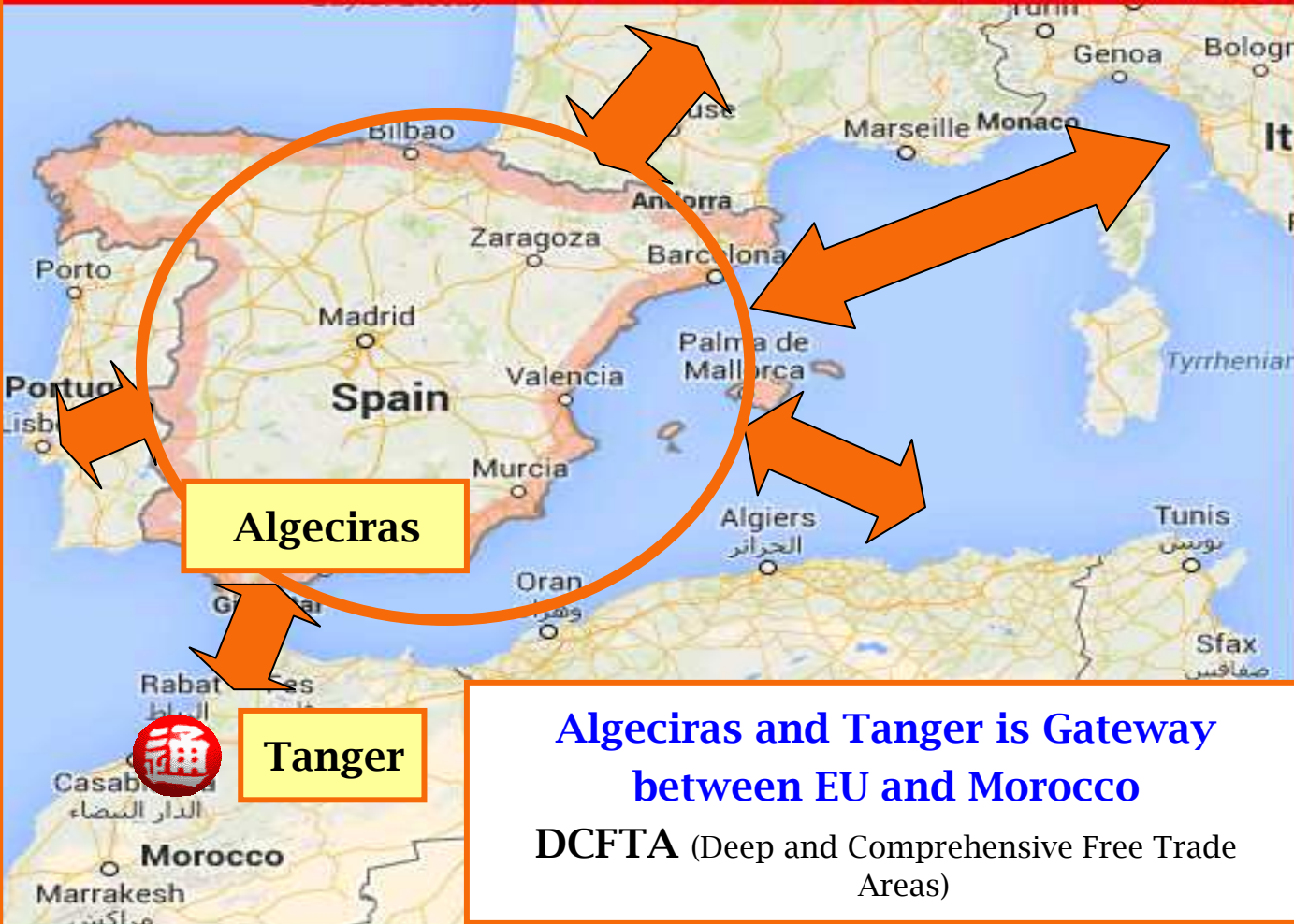
Commodity

Export

1. Phosphate rock
2. Textile
3. Electricals

Import

1. Energy
2. Machinery
3. Consumer goods

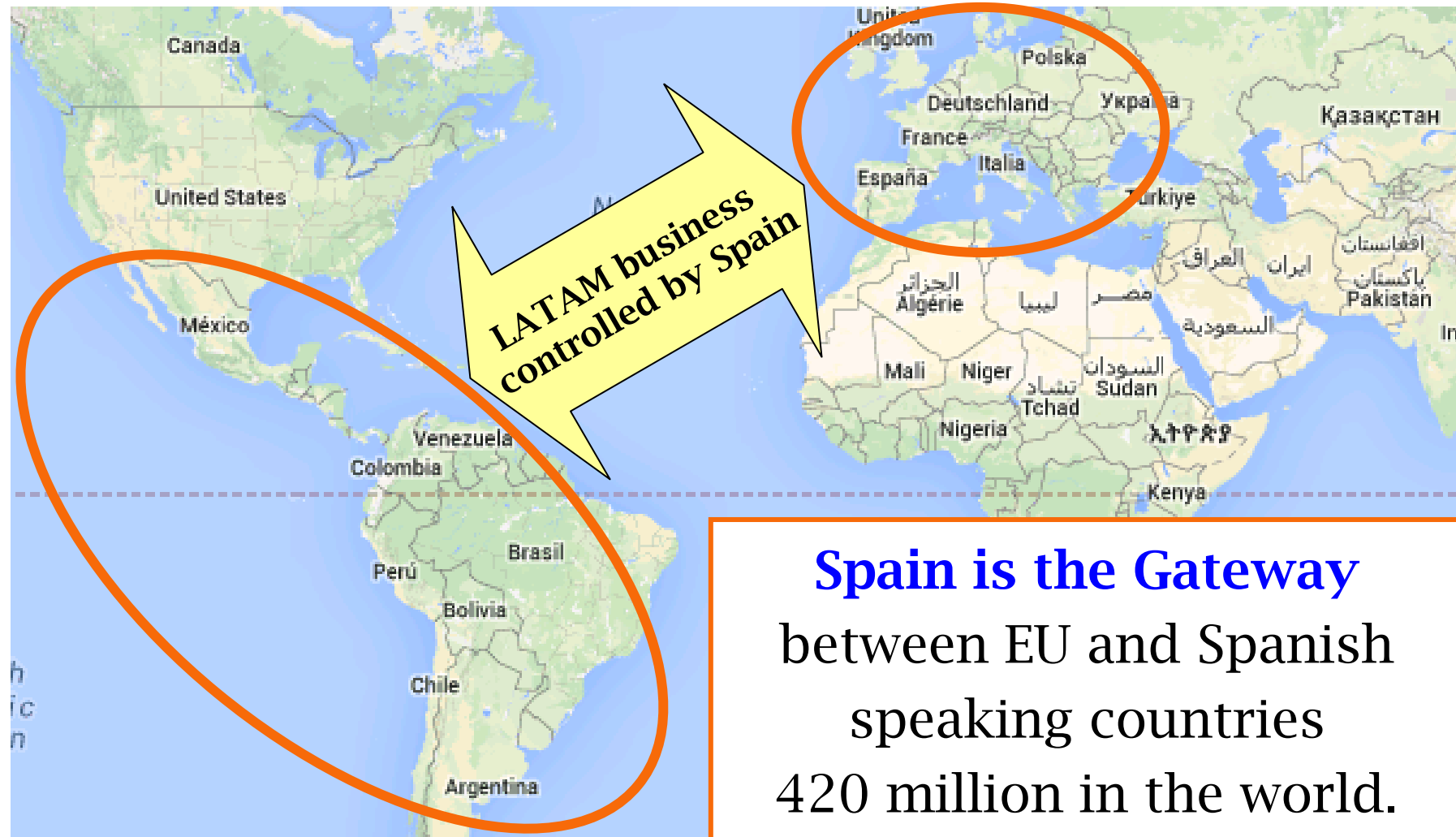


**Algeciras and Tanger is Gateway
between EU and Morocco**

DCFTA (Deep and Comprehensive Free Trade Areas)

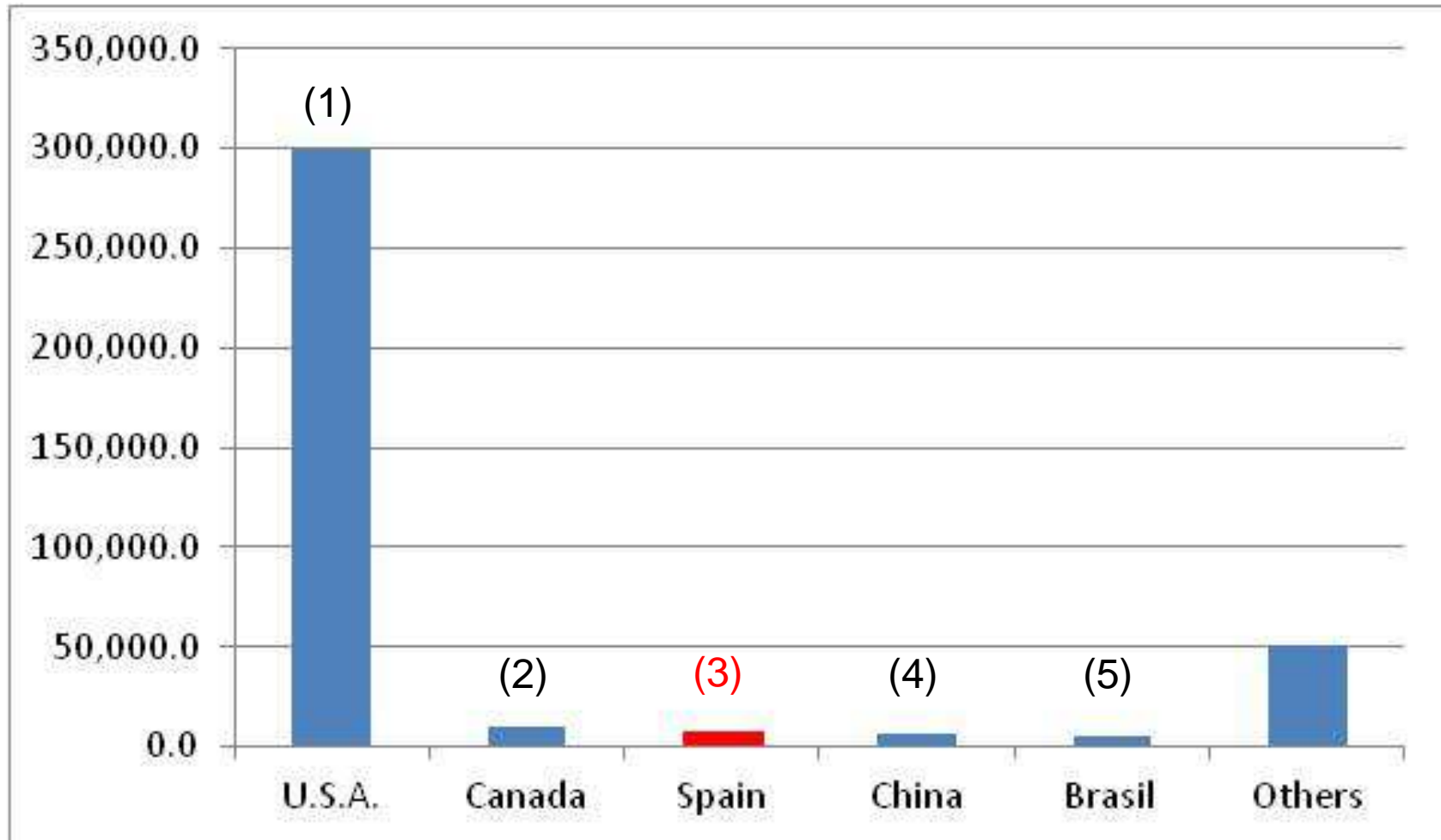
Advantage of business between EU and LATAM

Spanish Speaking Countries



Bridge to Latin America / Mexico

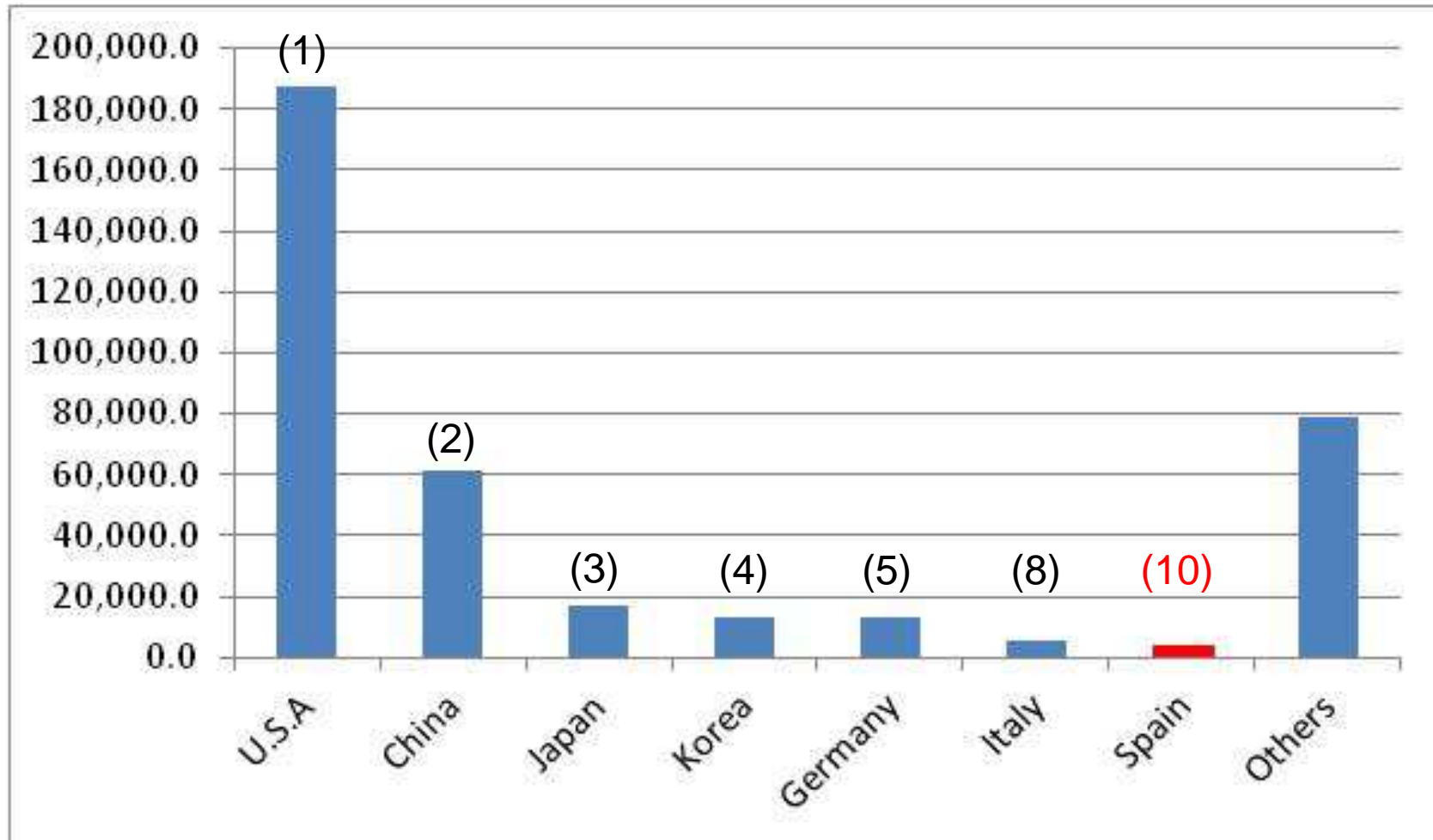
Trade Partner / Export from Mexico



Yearly trade value in Million \$ (2013) Source: Secretaría de Economía with data based on Banco de México

Bridge to Latin America / Mexico

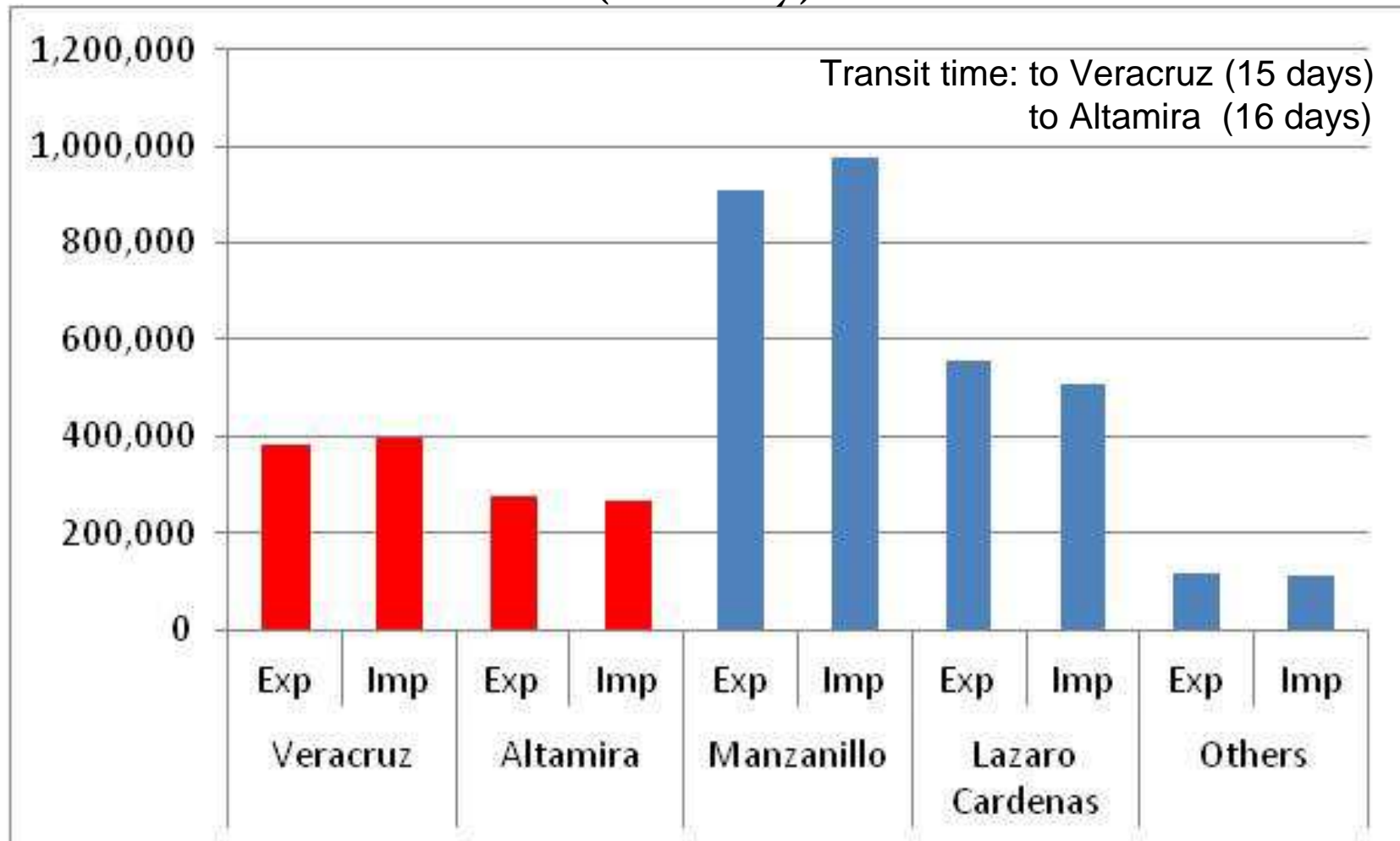
Trade Partner / Import **to Mexico**



Yearly trade value in Million \$ (2013) Source: Secretaría de Economía with data based on Banco de México

Bridge to Latin America / Mexico

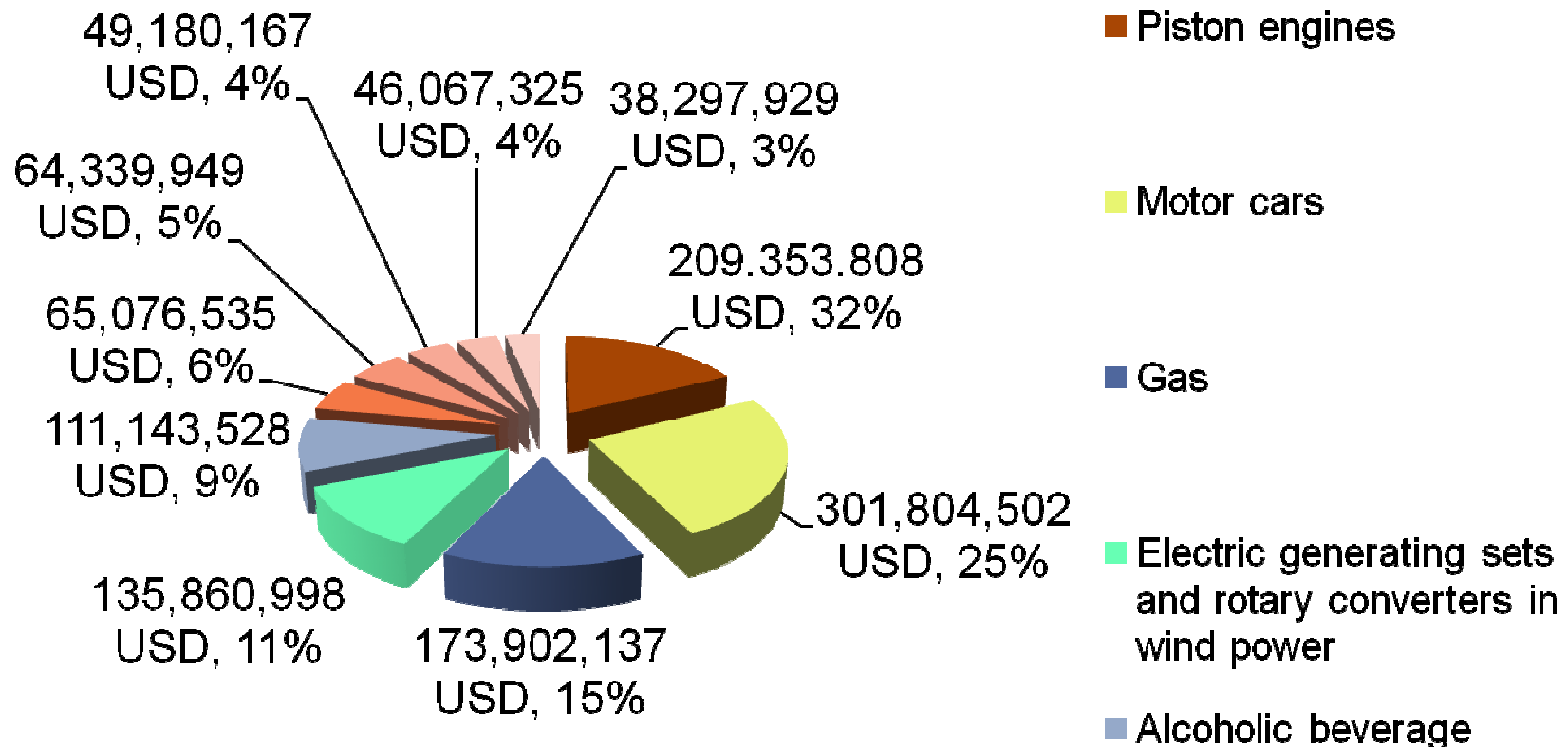
Main Port (Gate way) **in Mexico**



Yearly no of TEU in 2013

Source: Secretaría de Economía with data based on Banco de México

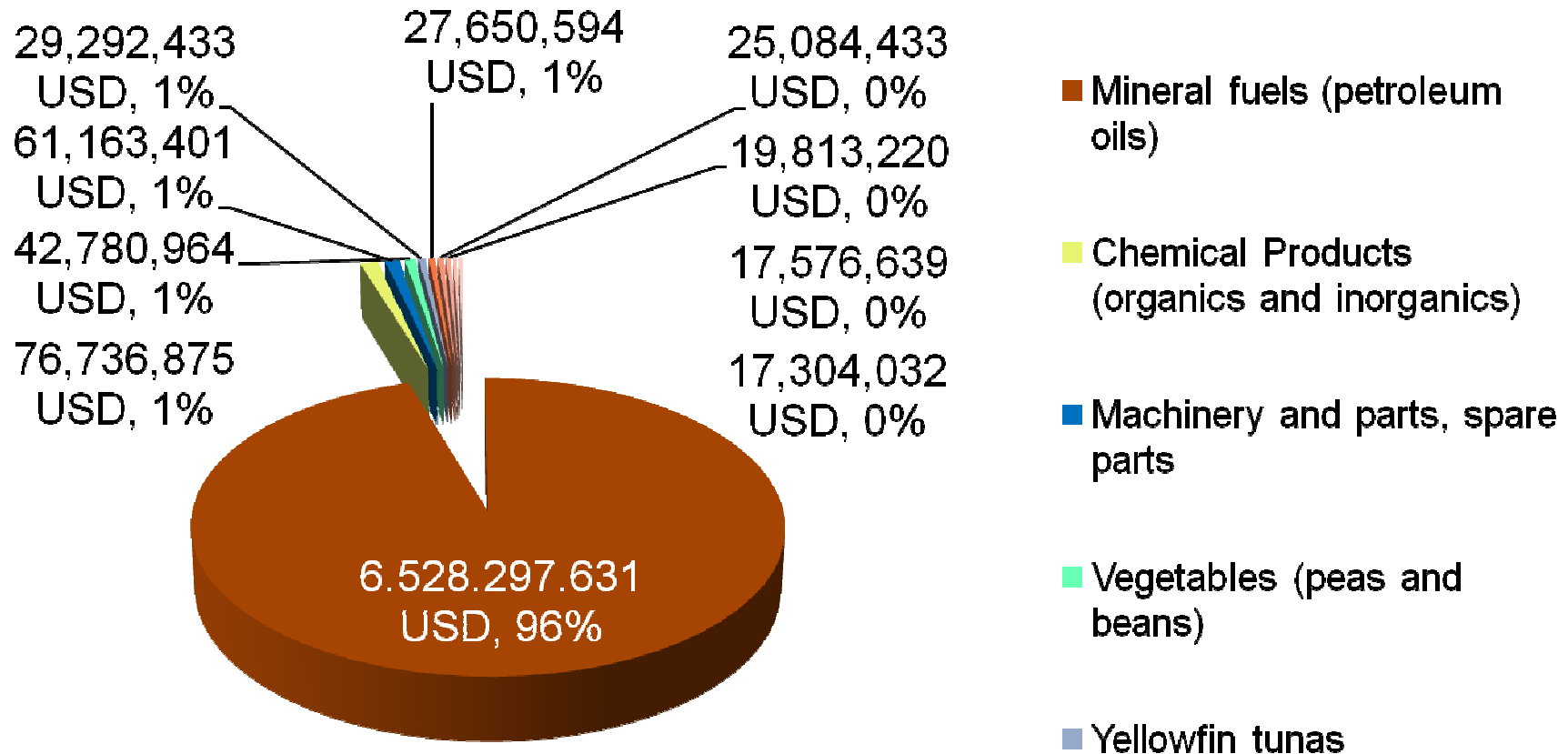
2013 Export from Spain to Mexico. Main HS Codes & Good's value



Source: Secretaría de Economía with data based on Banco de México
 Note 1: Figures are subject to change, including the most recent

by Martí Masdéu NEE - LATAM Route Development Executive

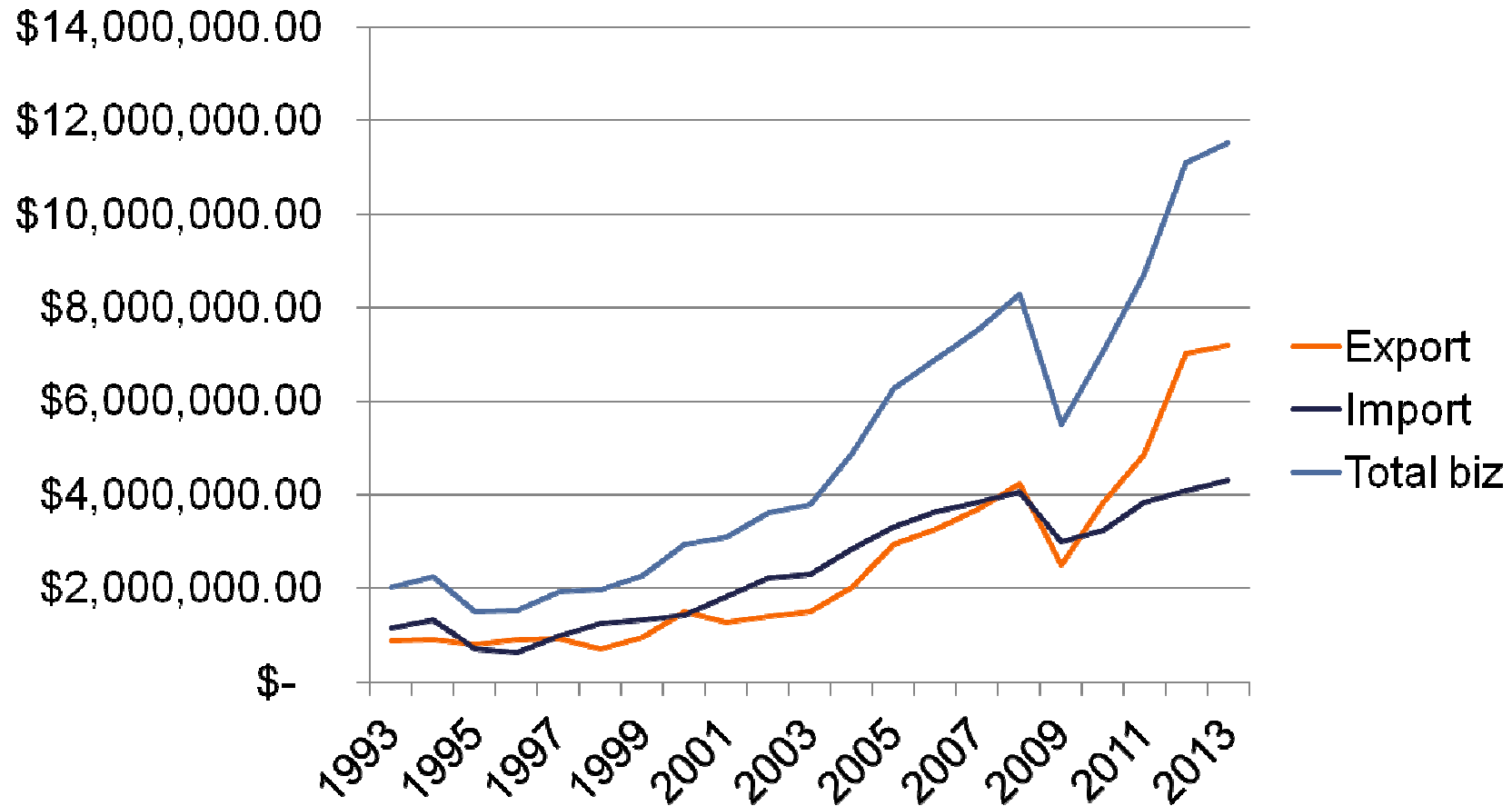
2013 Export from Mexico to Spain. Main HS Codes & Good's value



Source: Secretaría de Economía with data based on Banco de México

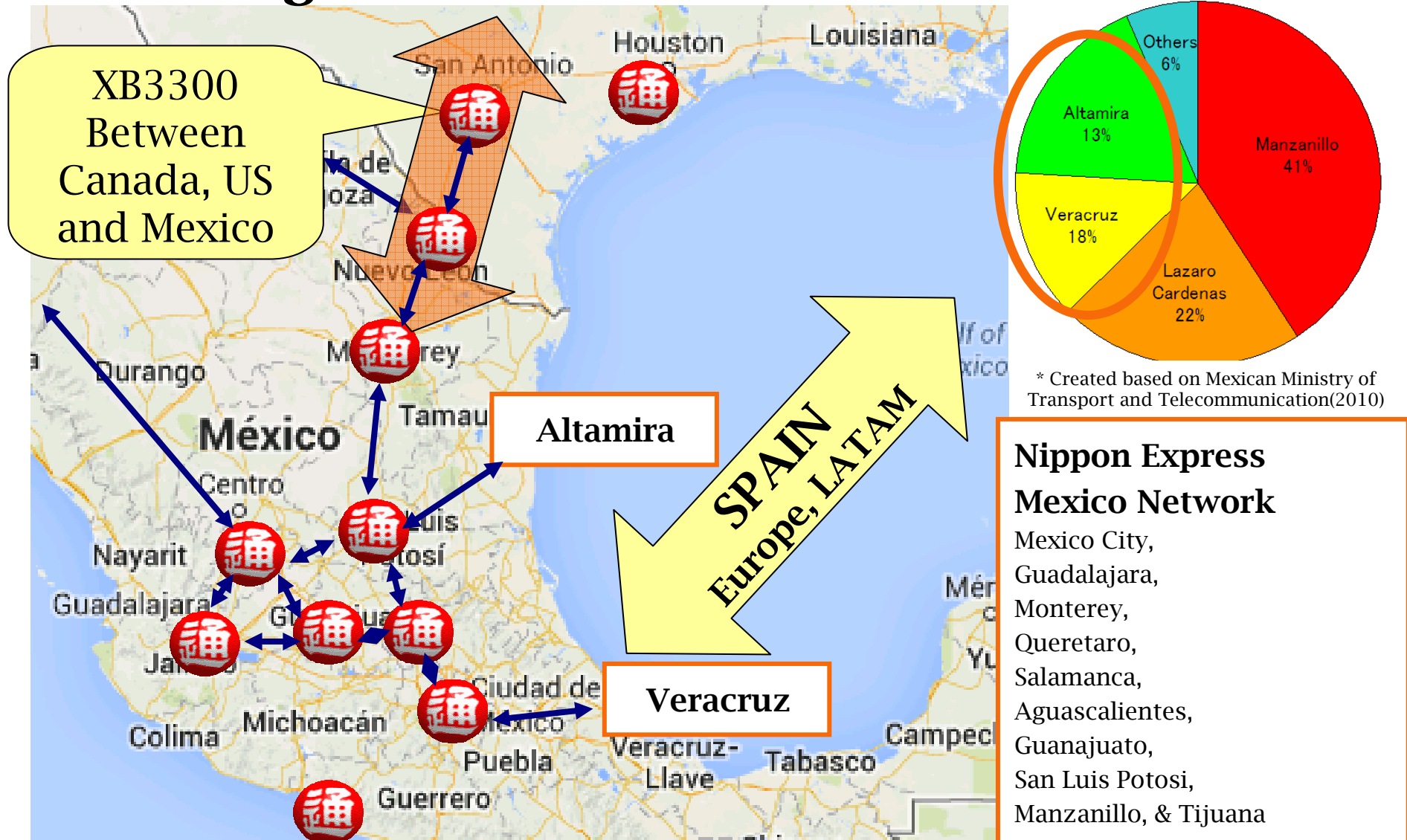
Note 1: Figures are subject to change, including the most recent

Balance between Spain & Mexico in last 20 years, from Mexican point of view

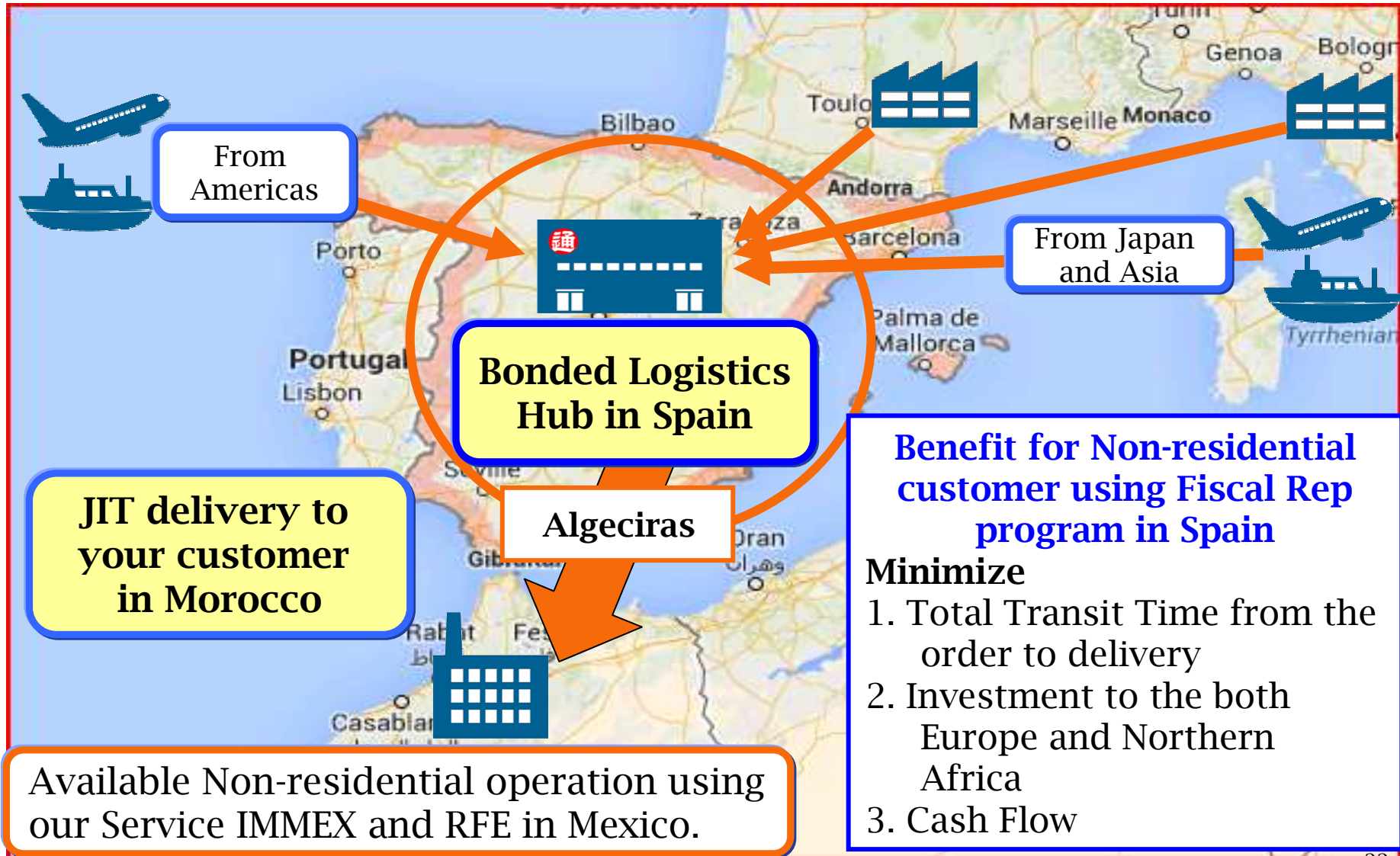


Source: Secretaría de Economía with data based on Banco de México

Advantage of business between EU and Mexico



Advantage of Bonded Hub in Spain

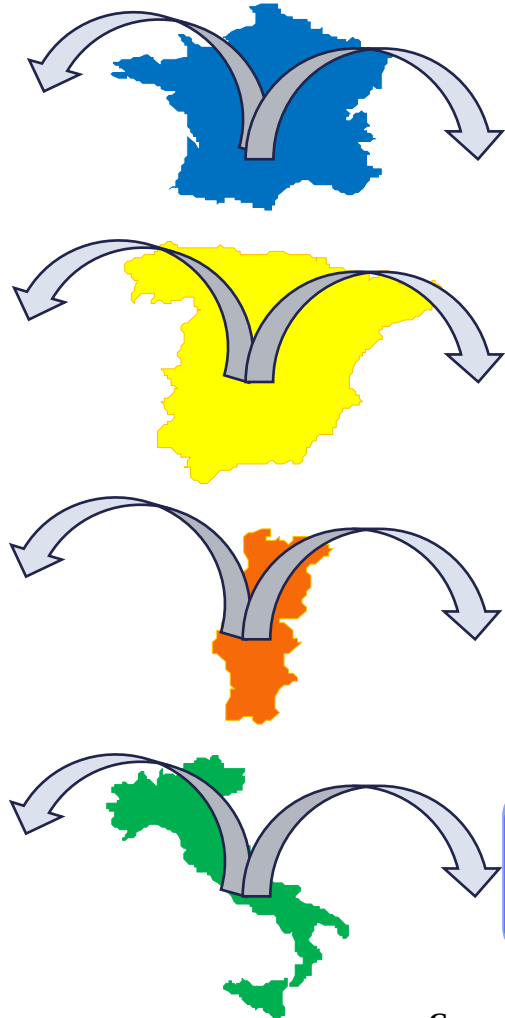


Nippon Express in Spain

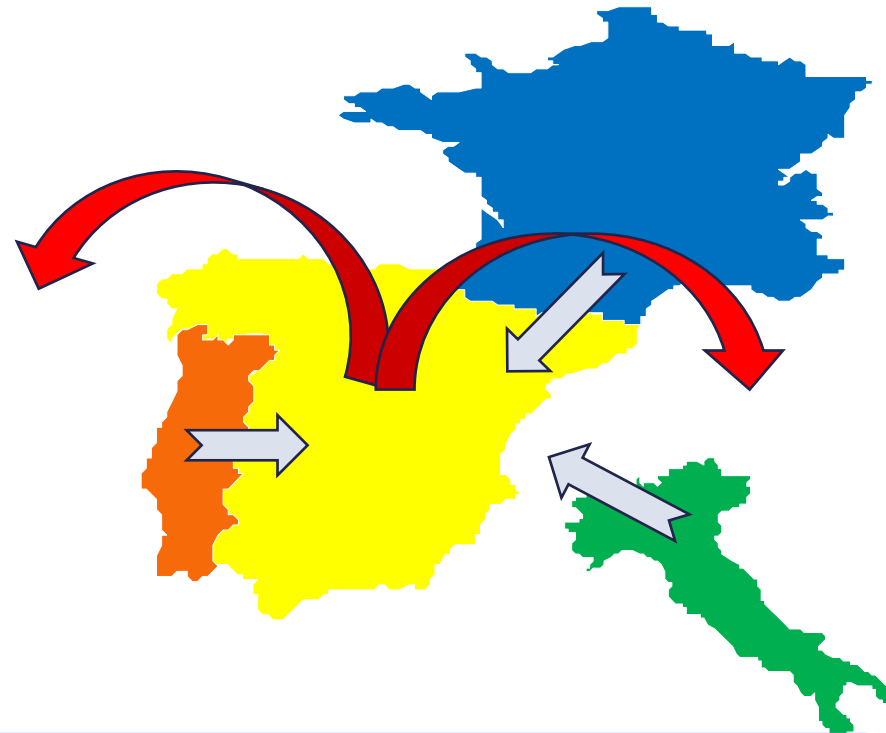


Strategy with Neighboring Countries

Traditional Transportation



Strategy with Neighboring Countries



The Gate of **MULTIPLE CONSOLIDATION**

Our Strategy

Vertical Industries

- Automotive Industry
- Fashion Industry
- Pharmaceutical Industry
- Perishables Industry

European Corridor

- Africa
- Geographical
 - Door to North
 - Bridge to Latam
- Strategy with Neighboring Countries

Hub station as DC or Satellite

- Physical Representative
- JIT for south area of Europe or North area of Africa and Mexico



Europeanization

- **Japanese DNA** = Customer's Satisfaction
- **European Style** = Adaption to local market

INTERCULTURAL TEAM WORK
 Japanese "Know-How"
 +
 Spanish "Know How"

To Pursue the Excellence as your Logistics Partner

IATA Agent : Quick & Powerfull

ISO 9001 Certificate : Quality as a pillar

AEO Certificate : Ahead of customs process

TAPA Certificate : Transport + Security

AGAIN

Advantage of Spain from SCM Logistics point of views

1. Geography

Door to Northern African area Collaboration
with South European Countries

2. Communication between LATAM

The Gateway to / from Latin American Countries
especially Mexico

3. Fiscal Representative Program

Minimum investment to expand business using
by Fiscal Rep Program in Spain



“Connecting and moving the world”



Gracias

