

**Transport  
activities  
Business  
Perspective**



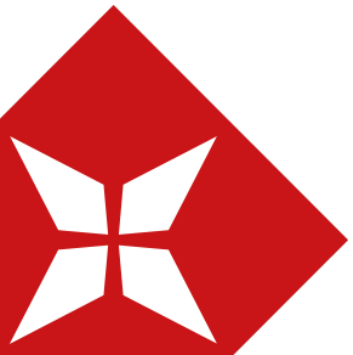
# Dutch family owned business, established in 1933



## Mission:

together with our customers, we continuously take up the challenge to add value to production and logistics so that in the long run we could both excel in what we are good at.

**axell**  **group**  
adding value together



# Expansion to Poland and development into employment

1932

- Jo Timmermans registers J.A.C. Timmermans as trading company in straw

1950

- Timmermans largest straw supplier in the Netherlands

1961

- Shift in core business, from trading to logistics

1980

- Jan Timmermans takes over from his father

1993

- Take over transport company “In ’t Veld” from Etten-Leur

1996

- Start of logistics company Ponetex in Rakoniewice, Poland

1999

- Start of employment agency in Netherlands, with recruitment agency in Poland

2004

- Start of employment agency in Poland
- Start of financial services in Poland
- Henriette Timmermans & children take over



2000  
-  
2006

- Opening of logistics centers in Nowy Tomysl, Skierniewice and Chorzow (PL)

2014

- Henriette Timmermans takes a step back and hands over to CEO & CFO

2015

- Full take over and incorporation into the group of employment agency in the Netherlands

2016

- Take over Flex-Temp recruitment in Hungary
- Rebranding all companies to Axell Group

2017

- Participation in Pallex 24, a pallet distribution company in Poland

2018

- Opening of logistic center in Teresin
- Moving logistic center from Chorzow to Gliwice
- Expansion logistic center Etten-Leur





# Specialist, uniquely combining employment & logistics

## Vision:

as a specialist in the Netherlands and Poland we offer the most creative and flexible solutions to support the production and logistics of our customers by delivering both people and services.

**employment** ✦ **logistics**  
flexible solutions



# Product-market combinations strengthening each other

- ❖ The PMC's for employment and logistics clearly offer synergy, especially where people and competences are concerned
- ❖ Operating from the logistic hotspots of Western and Eastern Europe

Employment delivers people in the Netherlands and Poland focussed on the following segments:

- Logistics
- Production
- Technical
- Supervisors



Logistics delivers services on the Poland – Netherland axis:

- EDC's in the Netherlands, preferably with volume towards Eastern Europe
- E-commerce operations
- Value added services
- Pallet distribution and final mile delivery
- International transport and rail



# Sustainable Transport & Logistics







## Model Hub and Spoke

W HUBie Centralnym, zlokalizowanym w centralnej Polsce, konsolidujemy i sortujemy każdą przesyłkę tak, aby Członek Regionalny skupił się tylko na odbiorach i dostawach na swoim terenie. Ta metoda pozwala nam optymalizację kosztów naszych partnerów biznesowych oraz na szybką realizację usługi w dobrej cenie.

### 1. Odbiór i konsolidacja

Ładunki Klientów są odbierane w ciągu dnia i konsolidowane w Depotach

### 2. Transport liniowy do Hubu

Każdego dnia auta liniowe Członków Regionalnych przywożą do Hubu Centralnego, zlokalizowanego w skonsolidowane przesyłki

### 3. Sortowanie ładunków w Hubie Pall-Ex

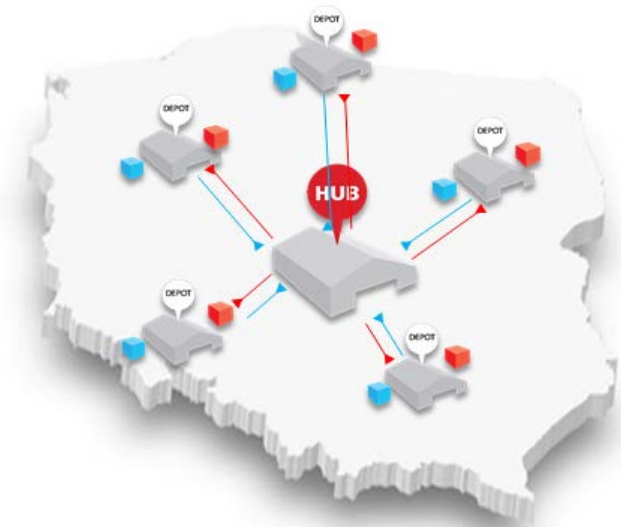
W Hubie Centralnych palety są sortowane.

### 4. Transport liniowy z Hubu

Palety są ładowane na auta linowe i wracają do magazynów Członków Regionalnych

### 5. Dostawa towaru do odbiorcy

Palety są rozładowane w Depotach, a następnie rozwożone do finalnych odbiorców zgodnie z zamówier.....





# What will shape the road Transport activities Business in the coming years ?

## 1- Growth in domestic and import export volumes

23% total increase in volume (tonnage) in the Polish industry over 4 years ( 2019-2022),proportionally increasing total transport performance.

7-15% Increase in operating costs by the end of 2020 projected by carriers as compared to 2018

## 2- Reorganization of international freight ( EU law changes)

13% simulated decrease in total transport performance in the Polish industry after 2022, if international transport performance were to drop by 20% as a consequence of EU's Mobility Package provisions



### 3- Driver shortages

200.000 Estimated level of driver in 2022

### 4- Digitalization

5% Process automation : potential level of carriers cost savings through digital automation of processes ( ERP,TMS,WMS...)

54 % Platformization Share of global operators that expect digitalizations to help them boost revenues

73% Share of global Logistics operators that declare they are carrying out investments related to the internet of things.

In 2018 Digital giants companies like Amazon decided to enter the Logistics services market



## 5 – Industrialization

28 %Autonomous vehicules

Potential for savings thanks to automous transport available after 2025



LNG , electric, Hydrogen key alternative drive technologies currently under development



# Dziękuję Dankjewel

Base on report : transport of the future (Santander,TLP,PWC)

