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SUPPLY CHAIN
EUROPEAN CONFERENCE

JUNE 19-20 – University of Verona
VERONA, ITALY



CSCMP 2025
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EUROPE



European Research Seminar
(ERS) ON LOGISTICS & SCM



UNIVERSITÀ
di **VERONA**

International Logistics in the Geopolitical Order

How CEVA Logistics is enforcing continuity and competitiveness for our partners in an unstable global environment



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European Research Seminar
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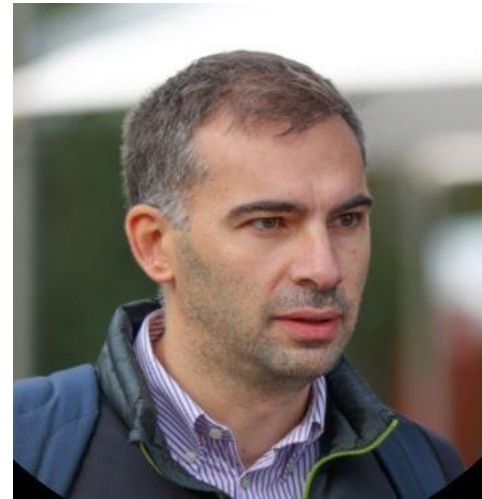
UNIVERSITÀ
di **VERONA**

Speakers



Emiliano Rota

CEO
CEVA Air & Ocean Italy



Augusto Pichero

Head of Key Account Management
CEVA Air & Ocean Italy



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European Research Seminar
(ERS) ON LOGISTICS & SCM



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Agenda

- 01 International trade highlights in 2025
- 02 CEVA Logistics Value Proposition as a Key International Logistics Player
- 03 CEVA Logistics : Focus on Air & Ocean in Italy

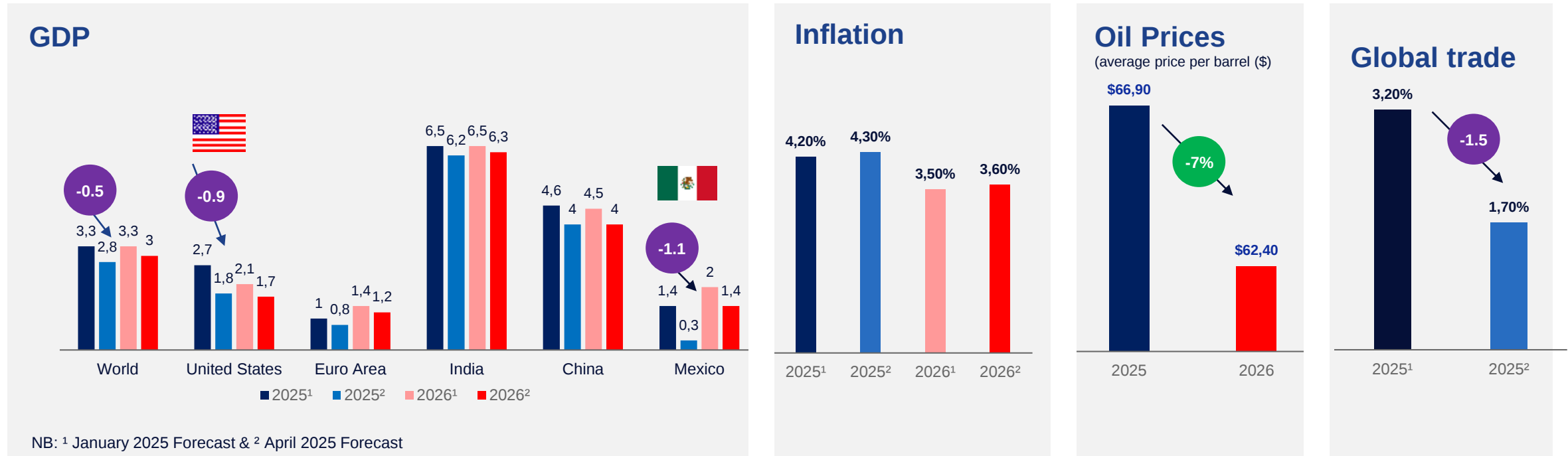
The background of the slide is an aerial photograph showing a white commercial airplane on the left and a large red cargo ship on the right, both moving across a dark blue body of water. The text "INTERNATIONAL TRADE HIGHLIGHTS" is overlaid in large, bold, red capital letters on the left side of the image.

INTERNATIONAL TRADE HIGHLIGHTS

June 2025

CEVA LOGISTICS INTERNATIONAL TRADE HIGHLIGHTS

Global growth is expected to decline and downside risks to intensify as major policy shifts unfold...



- In 2025, **global GDP and growth in advanced economies** are both projected to be **0.5 percentage points lower** compared to the January 2025 WEO Update
- **Global trade growth** is expected to **slow down** in 2025 to **1.7 percentage point**, a **downward revision of 1.5 percentage point** since the January forecast
- Futures markets indicate that oil prices will average \$66.9 per barrel in 2025, a **15.5 percent decline**, before falling to \$62.4 in 2026
- Compared the January 2025 WEO, **the global inflation forecast is slightly higher for 2025**
- In the US, **consumer, business, and investor sentiment** has shifted from optimism at the beginning of the year to **notable pessimism due to rising uncertainty and new tariffs**
- In 2024, **China's growth** was mainly driven by **external demand**, while in the **US, private consumption** remained the primary contributor to GDP growth

... alongside with other Global disruptions



Global trade slowdown

New US tariffs & regulation

Decarbonization

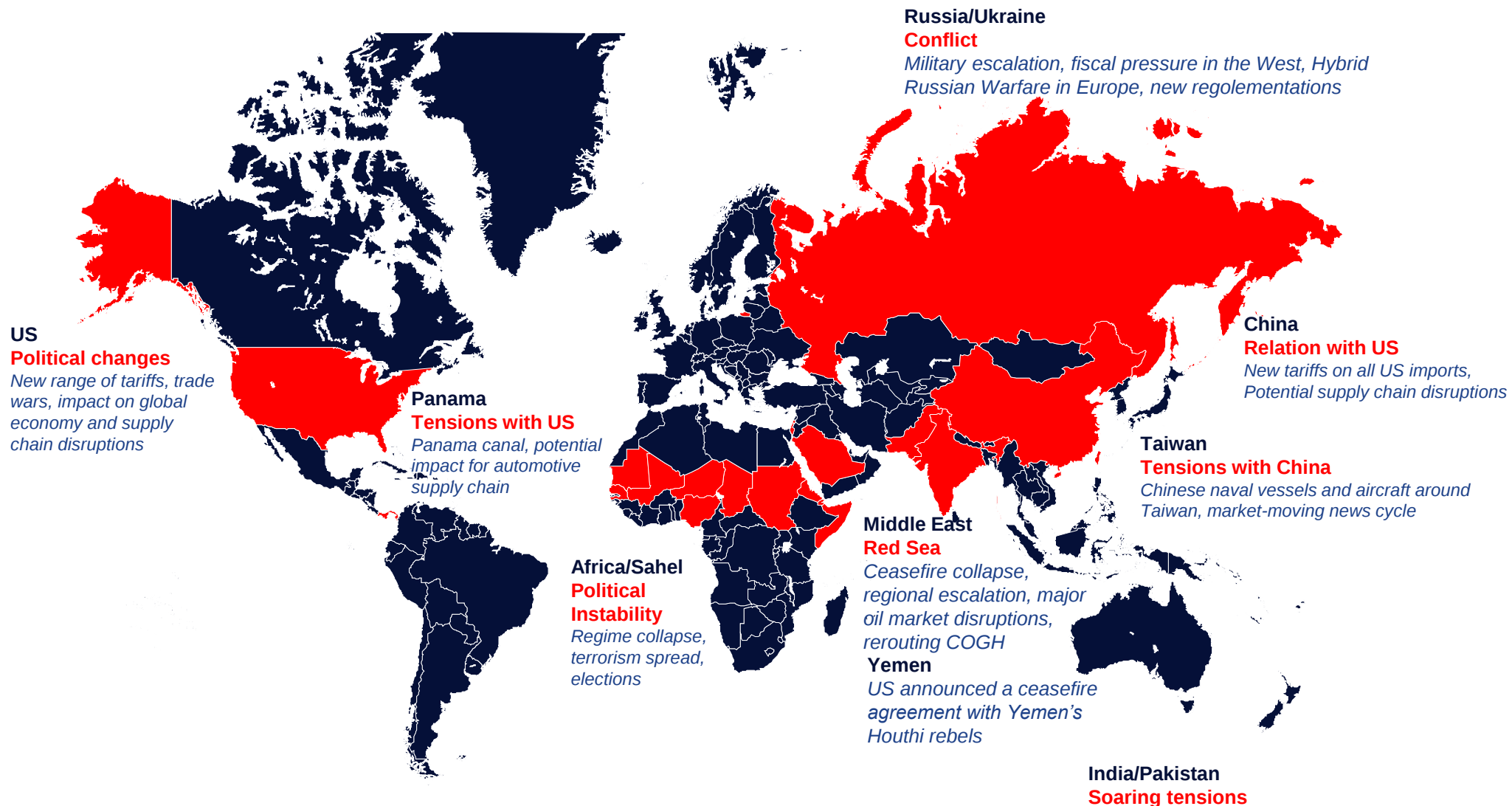
Minimis

- | | | | |
|---|--|--|--|
| <ul style="list-style-type: none">• Global slowdown of -1.5 percentage points• Potential decoupling of the Chinese and U.S. economies, with the WTO estimating an 81% decline in merchandise trade between the two countries in 2025 | <ul style="list-style-type: none">• The most impacted global supply chains are in the Automotive, High Tech, E-commerce, Healthcare, Agricultural• The US and China agreed to reduce a 145% tariff on Chinese imports to 30% for 90 days starting from May 14, 2025. | <ul style="list-style-type: none">• Pressure to reduce greenhouse gas emissions and align with international climate targets, particularly through IMO and SAF regulations.• October 2025 - the IMO is expected to adopt a global carbon pricing mechanism, imposing a \$100 per ton fee on CO₂ emissions from ships starting in 2028 | <ul style="list-style-type: none">• US: Since 2nd of May , Goods under Sections 201, 232, or 301 remain tariffed, even below \$800, and where previous indirect exceptions may have applied.• Europe : The European Union is set to propose a 2 euro (\$2.27) handling fee for low-value e-commerce packages coming into the bloc |
|---|--|--|--|

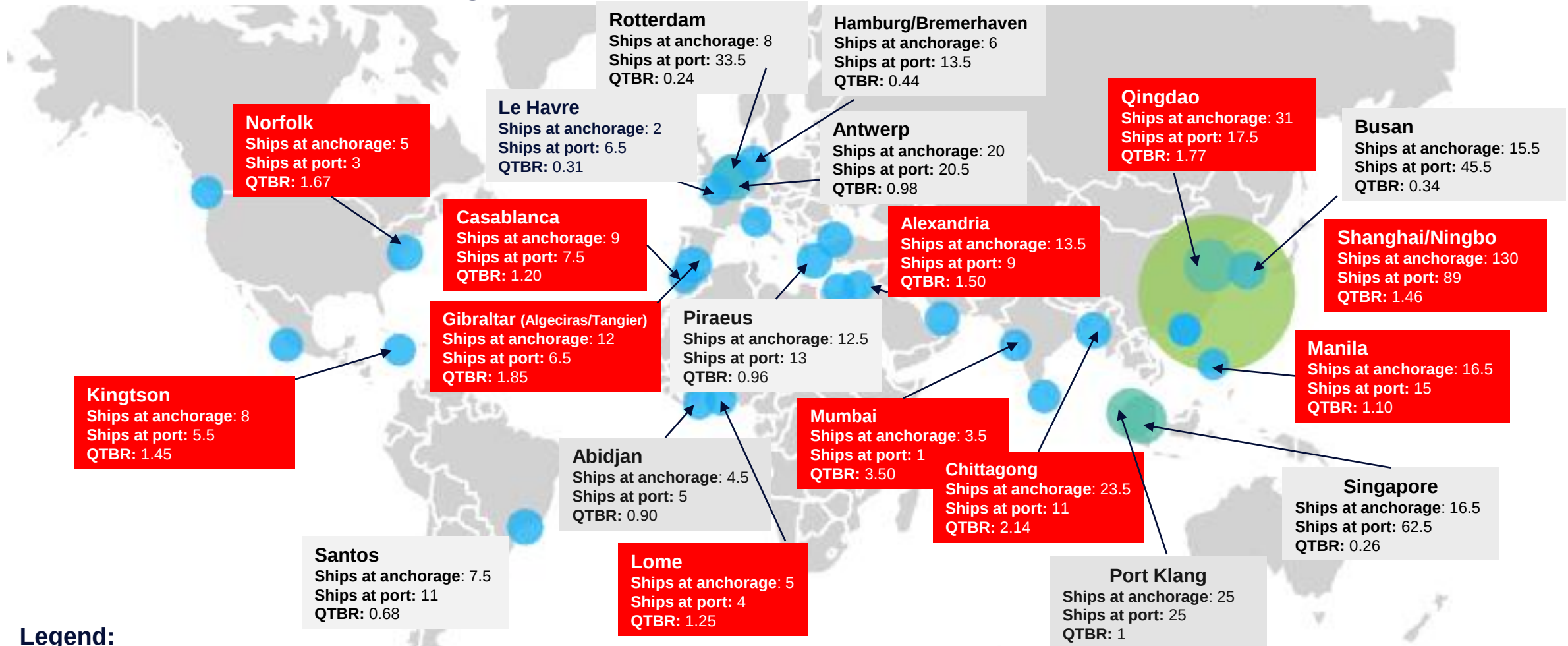
SHIPPING IMPACTS

- | | | | |
|---|--|---|--|
| <ul style="list-style-type: none">• Demand decrease• Potential temporary overcapacity• Pressure on logistics costs to offset increased tariff costs• Flow re-globalization | <ul style="list-style-type: none">• A surge in trade volumes between US and China, increasing demand vs. past months• Sea freight routes, particularly trans-Pacific lanes, may experience congestion• Freight rates for both sea and air transport are expected to rise | <ul style="list-style-type: none">• Increased costs and Regulatory compliance• Operational adjustments (e.g. “Slow Steaming”)• Infrastructure Challenges | <ul style="list-style-type: none">• Sharp decline in e-commerce-related airfreight volumes• Risk of overcapacity on transpacific routes• Extended customs processing• Restructuring of global supply chains (Nearshoring strategy , modal shift) |
|---|--|---|--|

2025 Geopolitical Hotspots



Worldwide Port Congestion – 08 June 2025



Legend:

Ships at anchorage: a vessel that is anchored in a designated safe area within a harbor or offshore, temporarily secured while not underway

Ships at port: a vessel that is docked at a harbor or terminal, typically for loading or unloading cargo or passengers, refueling, and undergoing maintenance or repairs

Queue to Berth ratio (QTBR): is calculated by dividing the number of ships waiting to berth by the number of ships currently alongside (berthed). It provides insight into port congestion and the efficiency of ship berthing operations. <1: **Good** // = 1 **full capacity usage** // >1 **Congestion**

Source: Linerlytica Port Congestion

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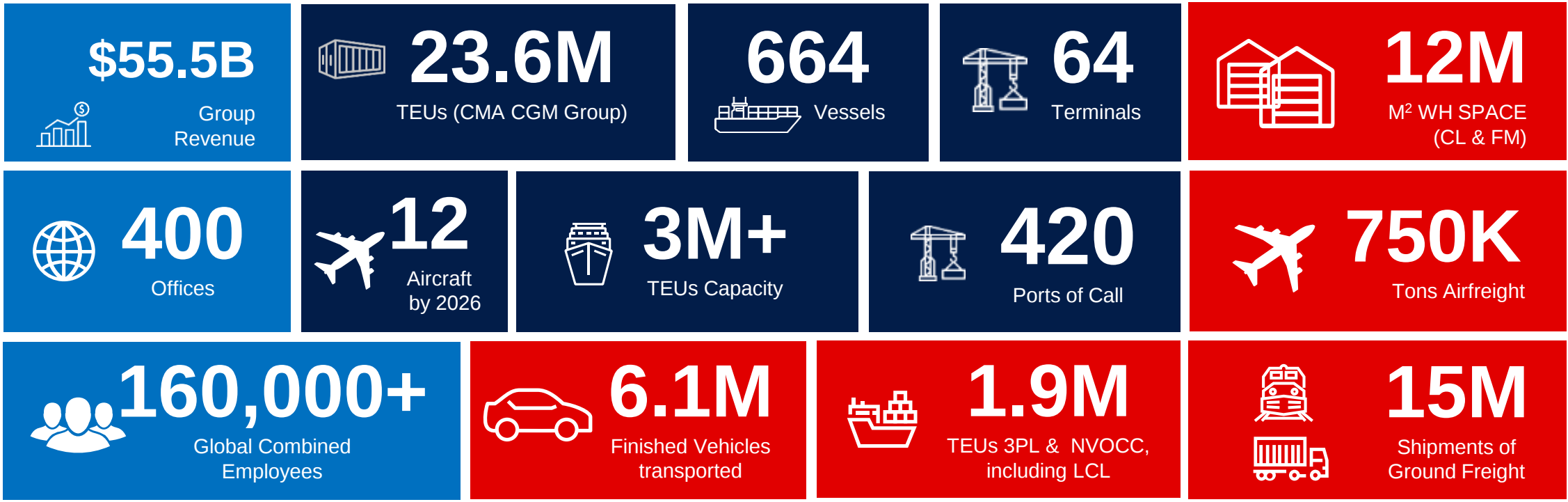
**PART OF THE
CMA CGM GROUP**

A Global Player in Sea, Land, Air and Logistics Solutions

One of the world's largest transport companies with a reputation for best-in-class profitability.



Leading global logistics company. Fully owned by the CMA CGM Group.



The background of the slide is a photograph of five CEVA Logistics employees standing in a warehouse. In the foreground, a woman with dark hair tied back, wearing a red CEVA Logistics t-shirt, smiles at the camera. Behind her, four other employees (three men and one woman) are standing, wearing orange high-visibility safety vests over their work clothes. The warehouse environment is visible in the background with blurred lights and equipment.

ABOUT CEVA LOGISTICS

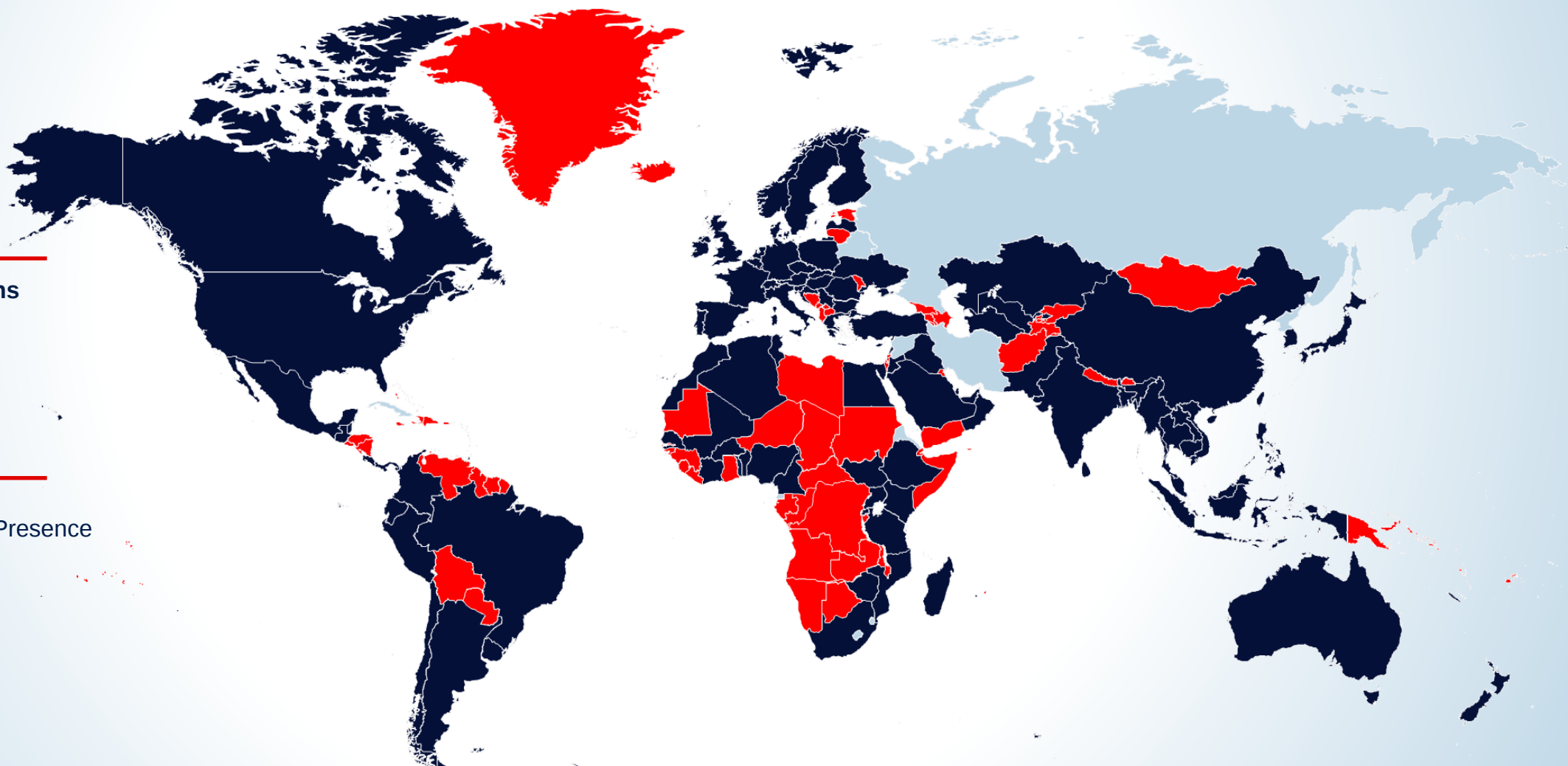
Presence in More Than 170 Countries

Anything from anywhere to everywhere using our expansive network

Operating Regions

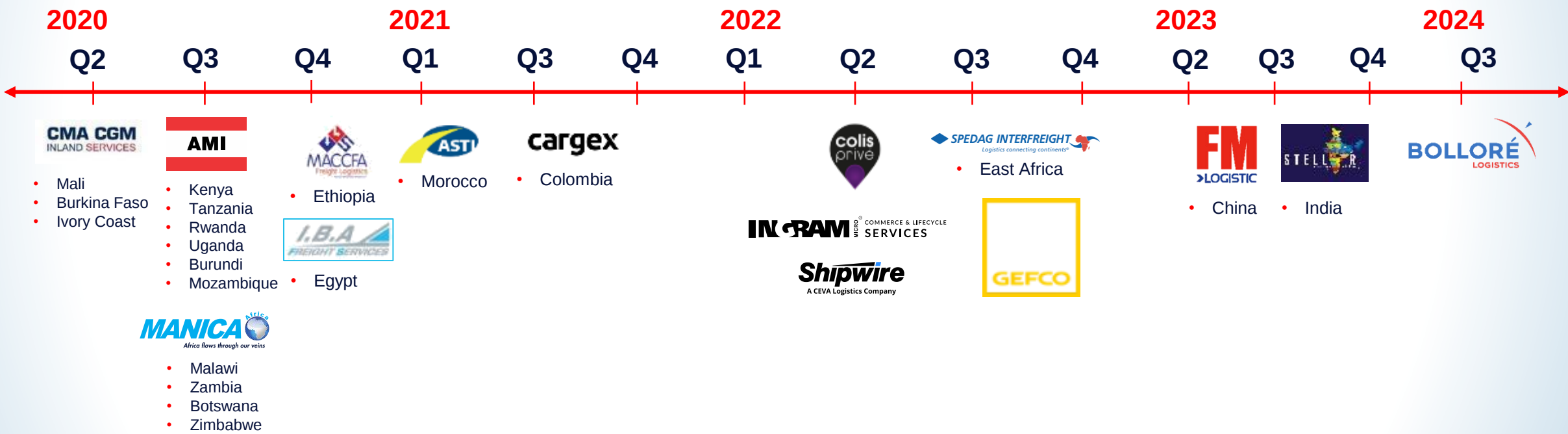
- APAC
- EUROPE
- LATAM
- IMEA
- NORTAM

- CEVA Direct Presence
- Agencies
- No Presence



Strengthening our presence with Strategic Acquisitions

Our major acquisitions since 2020 have led to CEVA becoming a Top 5 global logistics player. In 2020, we opened more than 16 new CEVA entities in Africa through acquisitions. In 2021, the acquisition of Cargex in Colombia gave us a strong position in the region's perishables market. In 2022, we invested in eCommerce logistics through acquisitions of Colis Privé and Ingram Micro CLS and in automotive logistics through the acquisition of GEFCO. In 2023, we gained additional scale in China with FM Logistic and in India with Stellar Value Chain Solutions. In 2024, we welcomed Bollore Logistics, boosting our offering in air and ocean freight.



End-to-End Logistics Solutions



**Air
& Ocean**

**Ground
& Rail**

**Contract
Logistics**

**Finished
Vehicle Logistics**

**Project
Logistics**

**Lead
Logistics**

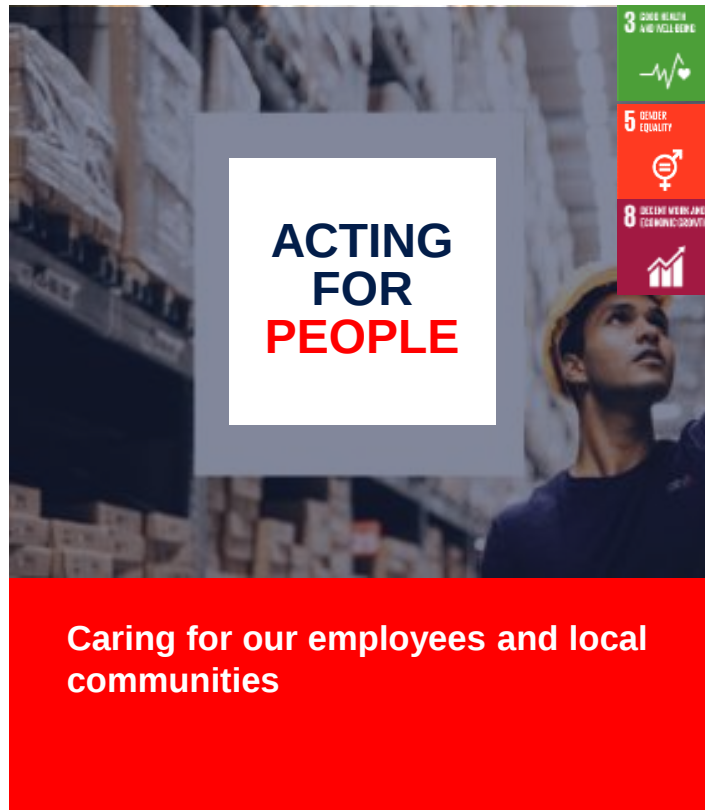
**Customs
Brokerage**

DIGITAL SOLUTIONS

LOW CARBON SOLUTIONS

CSR Strategy & Ambition

Based on 3 pillars and aligned with the UN Sustainable Development Goals



**ACTING
FOR
PEOPLE**

Caring for our employees and local communities

3 GOOD HEALTH AND WELL-BEING
5 GENDER EQUALITY
8 DECENT WORK AND ECONOMIC GROWTH



**ACTING
FOR
PLANET**

Contributing to a growth model that respects the environment and natural resources

12 RESPONSIBLE CONSUMPTION AND PRODUCTION
13 CLIMATE ACTION
14 LIFE BELOW WATER
15 LIFE ON LAND



**ACTING
FOR FAIR
TRADE**

Building a responsible value chain, in collaboration with partners, customers and suppliers

9 INDUSTRY, INNOVATION AND INFRASTRUCTURE
12 RESPONSIBLE CONSUMPTION AND PRODUCTION

Key CSR achievements in 2024



Women in Management
32% (+2pts vs. 2023)
Women total workforce
40% (+2pts vs. 2023)



Volunteering Time-Off
program launched

9,300+ employees mobilized

**DIVERSITY &
INCLUSION
AWARD**
CEVA UK



**TOP
EMPLOYER**

CEVA Brazil,
Peru, Colombia
and Argentina

**BEST
COMPANY
TO WORK
FOR IN ASIA**
CEVA Malaysia



Continuing Site decarbonization
Low carbon elec. **34 -> 69%** (vs 2023)
LED coverage : **84 -> 91%** (vs 2023)
+ other projects (Solar panels, eco-MHE,
Waste, Water)



1 150+ low carbon vehicles in operation

Electric, Biofuel, Biogas
POC on Hydrogen



Launched CEVA FORPLANET
new suite of sustainable solutions
dedicated to low carbon transport and
circular economy



Updated the CMA CGM Group
Human Rights policy
Define Governance, Due Diligence and
Remediation on key issues



EcoVadis
Gold Medal 76/100
(+12pts vs 2023)



Enhanced Customer Support
1 major decarbonization client event
450+ meetings on CSR
4,000+ CO2 reports

Agenda

A short horizontal bar with a red segment on the left and a white segment on the right.

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Facts & figures

Footprint



Logistics solutions

- ✖ Air transport
- ✖ Ocean transport
- ✖ Ground & Rail transport
- ✖ Contract logistics & reusable packaging
- ✖ Project logistics
- ✖ Finished Vehicle Logistics
- ✖ Customs
- ✖ Multimodal transportation

Industries solutions

- ✖ Automotive
- ✖ Consumer, retail & E-commerce
- ✖ Energy
- ✖ Technology
- ✖ Healthcare
- ✖ Industrial & Aerospace

Certifications

- ✓ ISO 9001
- ✓ ISO 14001
- ✓ ISO 45001
- ✓ AEO
- ✓ GDP
- ✓ ADR

Key figures

1.2K+

employees (incl. interims)

2,500+

clients

68

sites

700K+

sqm of warehousing space

980K+

tons transported by road

53K+

TEUs ocean

35K+

tons transported by air

500K+

vehicles transported

They trust in us



CEVA ITALY

AIR AND OCEAN FREIGHT

Making the world a smaller place

Footprint



Solutions

- ✦ Cargo: Standard, Non-stackable, Hazardous or oversized
- ✦ Air Now / Air Premium / Air Value
- ✦ Air Charter, CEVA Time Critical Service
- ✦ SKYCAPACITY and Advanced Ocean
- ✦ SEA+AIR solution
- ✦ LCL / FCL
- ✦ Freight management services
- ✦ Consolidation
- ✦ Green ocean solutions

Sectors

- ✦ Automotive
- ✦ Aerospace & Defence
- ✦ Industrial Projects
- ✦ Healthcare
- ✦ Food & Beverage
- ✦ Luxury & Fashion
- ✦ Oil & Gas
- ✦ Perfumes & Cosmetics

Value added services

- ✦ Reefer & Perishable cargo
- ✦ Insurance
- ✦ Customs brokerage

Certifications

- ✓ ISO 45001:2018
- ✓ ISO 9001:2015
- ✓ ISO 14001:2015
- ✓ AEO – F
- ✓ REGULATED AGENT (R.A./ENAC)
- ✓ TAPA FSR Level A
- ✓ GDP (external storage and handling)

Key figures

330+
permanent employees

2K+
clients

12
sites

10K+
sqm of
warehousing space

27K+
tons air export

30K+
TEUs ocean export

9K+
tons air import

16K+
TEUS ocean import

AIR FREIGHT

A large portfolio of offers to match all needs and requirements



Air freight core offer

Air Now

Expedited service with transit times of 24-48 hours, "next flight out" whenever and wherever possible

Air Premium

Direct Routings services for shipments with required transit times 48-96 hours

Air Value

Cost-efficient consolidation service with transit times of 96+hours



Specialized offer

Air Priority 24/7

- ▮ Time critical
- ▮ Charter

Air Saver

- ▮ SEA+AIR an in between solution to move your shipment
- ▮ From Asia to Dubai
- ▮ From Dubai to rest of the World
- ▮ From Asia to US
- ▮ From US to Europe



Vertical solutions

Temperature Sensitive

Fashion & Luxury Solutions

Batteries

OCEAN FREIGHT

Services Portfolio



FCL

Full container Load service
under Pyramid Line

All container types

Serving ww countries door to
door

On all Ocean Alliances



LCL

Worldwide consolidation
services

Defined routing
& transit time

Fixed sailing schedules



Freight management services

For clients having their own
contract with carriers

9 modules packaged in
4 solutions covering origin and
destination services



Client consolidation

Buyers' and sellers'
consolidation

Multi country consolidation

Origin value added services

Cross dock & merge
in transit at destination

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Thank you!

