Leading European Transport and Logistics Markets

Ti

LOGISTICS™ EXECUTIVE

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Introduction

At the end of 2017, the economic situation in Europe appears to be relatively healthy. The IMF forecasts that EU economic growth in 2017 will be 2.3%, up slightly from growth of 2.0% in 2016. These figures are a marked improvement on market conditions in 2012 and 2013, when economic growth was -0.4% and 0.3% respectively. Back then, the policy of the day was austerity, but governments collectively have since adopted looser fiscal policy stances.

Looking ahead, the IMF expects real GDP growth rates in each year from 2018 to 2022 to be between 2.1% and 1.6%, with growth gradually slowing down over the period. Over the next five years then, general market conditions are expected to be less favourable for logistics providers than in 2017, although one must bear in mind that the story is different for each particular logistics market.

The fortunes of all logistics markets in Europe are linked to economic growth to one extent or another. Road freight and contract logistics seem to have the tightest link. Freight forwarding is somewhat removed as trade volume growth matters most, leaving it relatively more vulnerable to changing market conditions outside of Europe. Elsewhere, growth in the express and small parcels sector is primarily powered by the structural shift towards online retail, seeing it achieve considerably higher growth rates than other logistics sectors.

All in all, Europe's logistics industry currently appears to be enjoying something of an upturn. Logistics service providers ought to be doing well.

In this report, detailed country profiles for 26 European markets are provided. They include qualitative and quantitative summaries of the state of each country's logistics market, measures of logistics performance and infrastructure quality, market sizing data, rankings of the largest logistics providers, infrastructure maps highlighting core logistics hubs, infrastructure summaries (road, rail, ports and airports) and charts revealing each country's largest import and export road freight partners.

To put this all into context, a chapter featuring European-level data and data comparing all European countries is also provided. Market sizes and forecasts for the express and small parcels, road freight, contract logistics and freight forwarding sectors are presented, in addition to road, air and sea volume data.

Fundamentally, this report provides a comprehensive overview of logistics in Europe.

ABOUT TI

Ti's Origin and Development

Ti is a leading logistics and supply chain market analysis company developed around five pillars of growth:

- Logistics Briefing
- Ti Market Research Reports
- Ti Insight portals
- Ti Consulting
- Ti Conferences and Training

Ti acts as advisors to the World Economic Forum, World Bank, UN and European Commission and have 14 years worth of providing expert analysis to the worlds leading manufacturers, retailers, banks, consultancies, shipping lines and logistics providers.

What Sets Ti Apart?

- Globally recognised and trusted brand
- Global Associate Network provides a multi-country, multi-disciplinary and multi-lingual extension to Ti's in-house capabilities
- More than fourteen years of knowledge delivery to global manufacturers, retailers, banks, consultancies, shipping lines and logistics providers
- Unique web-based intelligence portals
- Interactive dashboard
- On-going and comprehensive programmes of primary and secondary research

ABOUT LOGISTICS EXECUTIVE

Global Expertise with Local Focus

Logistics Executive Group is the acknowledged industry leader providing a suite of whole-of-lifecycle business services including Corporate Advisory, Executive Search and specialist Supply Chain and Logistics Training.

Since 1999, clients have trusted us to help recruit, build world-class leadership and drive business performance with integrated Corporate Advisory services.

Today, we are a single source for leadership development, talent & recruitment services and business consulting to empower businesses and leaders to reach their goals. Offering a full suite of solutions designed and executed to position our clients from growth and overall improved performance, our service pillars include;

- Executive Search & Leadership Recruitment
- Corporate Advisory & Business Performance Consulting
- Accredited Training & Education Programs for the Supply Chain and Logistics sector.

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