

## Logistics

### Accelerate Your Business in Europe's Logistics Hub

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#### Industry Overview

Located in the European Union's center, Germany is the continent's largest economy and Europe's No.1 logistics hub. With annual revenues of nearly EUR 230 billion, the country exceeds the total revenues of France & the UK, Europe's 2nd & 3rd largest logistics markets combined. Moreover, Germany is the world's largest Intralogistics exporting nation and a global leader in logistics innovation, technology and cutting-edge logistics services, with over 2.8 million industry employees in approximately 60,000 companies.

More goods are destined to or pass through Germany than through any other European nation. Germany offers companies efficient

European-wide distribution hubs and solutions, facilitating easy access to the EU's 500+ million consumers, 250 million of which are accessible by overnight-delivery.

In addition to its ideal geographic location, Germany offers a world-class transportation infrastructure with a dense network that includes more than 12,500 km of highways (Autobahn), 40,000 km of rail tracks, 7,450 km of waterways, 35 freight villages, as well as Europe's leading international air and seaports.

### **Our Industry in Numbers**

- Germany is the largest logistics market in Europe with more

- than EUR 230 billion in turnover and a top 10 market share of 30%.
- Germany's location offers easy access to 9 neighboring countries and more than 500 million residents EU-wide.
- The sector is ranked No. 1 for top-quality infrastructure by the World Bank's 2014 "Logistics Performance Index" and is No. 5 worldwide in the World Economic Forum's "Global Competitiveness Report 2014-2015."
- Home to world-class

- logistic players, both global corporations and small and medium-sized companies with specialized logistics services.
- Over 2.8 million industry employees working in over 60,000 companies.

## **Market Potential**

Bordering nine countries, Germany's central geographic position in Europe makes it the ideal location for logistics hubs and distribution centers.

Germany is Europe's Nr. 1 logistics hub and is by far the largest logistics market in the EU in terms of revenues.

Totaling almost EUR 230 billion, Germany's logistics

market revenue is greater than France's and the UK's combined, Europe's 2nd and 3rd largest markets respectively. Germany's state-of-the-art infrastructure is also on top providing easy access to more than 500+ European consumers, from which roughly half are accessible by overnight delivery. Enterprises are optimistic that continued economic development will increase the demand for logistics services throughout the sector's various branches. Whether business requires the movement of goods by road, rail, waterway, or air, Germany provides a world-class logistics framework.

**ROAD -**  
German roads form the backbone of an efficient transportation infrastructure. In 2013,

around 77 percent of all tonnage of goods was transported on Germany's roads and highways. This amounts to more than 3.3 billion tons of cargo. Continuous investment in the road network is a high priority for the German government. During the period 2005-2015, around EUR 80 billion will be invested in a series of important projects, including the construction of 1,900 km and the upgrading of an additional 2,200 km of new limited-access highways and the construction or upgrading of around 5,500 km of other important federal highways.

**RAIL** - Rail transport covers about 9 percent of the market for hauled goods in Germany. This sub-sector reached a volume of 373.7 million tons in 2013, a

2.1 percent increase over 2012. During the same period, domestic transport reached 247.5 million tons, making up two-thirds of the total rail freight transport. Cross-border rail freight dispatches remained constant at 45.5 million tons in 2013, while rail freight deliveries to Germany increased markedly by 8.1 percent.

#### **WATERWAYS**

- Two of the four largest seaports in Europe are located in Germany, making it Europe's largest shipping market. Hamburg, Germany's largest, handled a volume of 9.3 million containers (TEU), while the Ports of Bremen handled 5.8 million containers. In all, more than 500 million tons of goods passed through

German seaports and inland ports in 2013 accounting for 7 and 5 percent respectively of the market for shipped goods in Germany. Ocean shipping accounted for 293 million tons and inland shipping for almost 227 million tons. Inland waterways play an important role and include main rivers such as the Rhine, the Danube, the Weser, and the Elbe. About 25 percent of Germany's waterway network is provided by canals, including the North Sea-Baltic Sea Canal, the Main-Danube Canal, and the Rhine-Oder Canal. These ensure effective connections from North to South and from West to East. The network is also highly comprehensive nearly all of Germany's main urban



areas are connected to ports and/or inland waterways.

**AVIATION -**

Germany is Europe's leader in the air cargo sector with airports dealing with approximately 4.3 million tons of air freight in 2013. Frankfurt/Main (FRA) airport, Europe's largest cargo airport, handled roughly 50 percent of Germany's air freight. Leipzig/Halle (LEJ) and Cologne/Bonn (CGN) ranked second and third in handling around 20 and 17 percent of Germany's air freight respectively. Germany has 27 major airports which are located throughout the country in a decentralized manner, allowing for excellent accessibility regardless of where business operations are located.

## **Market Access**

Entrepreneurs, who intend to provide transportation services using trucks with a minimum weight of 3.5 tons require an official authorization that can be obtained at the local Chamber of Industry and Commerce. The Chambers of Industry and Commerce also provide information on the licenses required for European cross-border traffic as well as the training requirements for drivers of dangerous goods.

Vehicles weighting more than 7.5 tons are banned from German motorways on Sundays and public holidays. Cabotage is restricted to three transports within one week after the border-crossing haulage. Trucks with a maximum permissible weight of more than 12 tons,

including trailers, are required to pay a toll fee in order to use German motorways. Further information is available on the website of Toll Collect and the relevant webpage of the Federal Ministry of Transport and Digital Infrastructure (BMVI).

### **Finding Providers**

Germany is home to the world's leading logistics companies, which serve one or more of the relevant industry sub-sectors: air, rail, road, and waterways. The German logistics market also includes thousands of efficient small- and medium-sized enterprises that offer logistics solutions and services ranging from basic to innovative.

For foreign businesses needing assistance in

identifying competent transport and/or logistics partners in Germany, the Federal Government has established the **Logistics Alliance Germany** (LAG). LAG provides information and advice concerning market access, and it connects businesses with the partners they need in order to serve their market goals. Contact can be established to experienced logistics service providers, logistics networks and clusters, relevant trade associations, partners for research and development, and other economic and political actors. Finally, LAG distributes information on industry events, trade shows, and useful publications. LAG's services are free of charge.

The Association of **German**

**Freight  
Forwarders  
and Logistics  
Operators**

(DSL)  
provides a  
database on  
its website that  
may be  
browsed to  
find German  
companies in  
the field.

**The Federal  
Association  
of Road  
Haulage,  
Logistics and  
Disposal**

(BGL)  
maintains a  
cooperation  
forum to  
promote the  
inter-company  
cooperation  
for transports  
within  
Germany and  
cross border  
as well as  
logistic  
services.  
Interested  
companies  
can send their  
cooperation  
requests  
online.

A Database  
with 1000  
German and  
European rail  
freight traffic  
companies is  
available on  
the website of  
the **Association  
of German  
Transport  
Companies** (VDV).

Entrepreneurs  
who are  
looking for a  
specific  
business

contact in the logistics industry may publish their inquiry free of charge on the **iXPOS Export Community**. Our Business Community enables both German and foreign companies from all economic sectors to advertise their products and services as well as to search for the products and services they need. In addition, the Community provides companies and entrepreneurs the possibility to create their own profile, participate in the forum, find business contacts as well as communicate and interact with all registered members.

### **Supporting Institutions**

There are many institutions whose main job is to support companies in the logistics sector in Germany. The

Chambers of Industry and Commerce are the mandatory professional organization, where logistic companies can find information about certification requirements as well as competent advice.

The **German Logistics Association** (BVL) is a network and business association for the German supply chain management and logistics sector. The association organizes industry-specific events and develops methods and processes to optimize challenges in the German logistics industry.

The **German Association of Materials Management, Purchasing and Logistic** (BME) supports companies active in the international procurement and logistics industries.

The **Association**

**of German  
Freight  
Forwarders  
and Logistics  
Operators**

(DSL)  
represents  
around 4,000  
companies in  
the logistics  
and forwarding  
sub-sectors.

**The Federal  
Association  
of Road  
Haulage,  
Logistics and  
Disposal**

(BGL)  
represents  
more than  
10,000  
companies  
throughout the  
industry.

**The  
Association  
of German  
Transport  
Companies**

(VDV) focuses  
on the rail  
cargo sub-  
sector and  
represents  
member  
companies at  
the national  
and European  
levels.

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industry  
associations please  
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