

# **Analytiqa**

## **Business Intelligence in Logistics and Packaging**

### ***Latest Research***

***March 2003***

### ***Eastern European Logistics***

*Identifying growth opportunities*

### ***WatchLOG***

*A new Bi-Monthly analysis of strategies, growth opportunities and developments in the European Logistics Industry*

# WatchLOG

## A new Bi-Monthly analysis of strategies, growth opportunities and developments in the European Logistics Industry

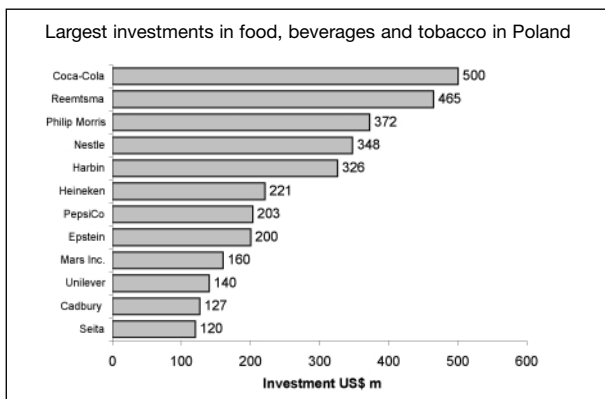
Keeping abreast of events in the logistics industry is essential, given the speed of development in the marketplace. Distributing news is not difficult. It is more valuable to analyse the significance of events and to present the wider importance and relevance for managers of logistics companies. Every two months, Analytiqa analyses all the key events in the European Logistics industry. Key events are summarised, and an Analyst's perspective provides commentary on the relevance of these events in terms of strategy, growth and performance.

Six issues are published annually. This March edition reports on events from January and February of 2003 and looks forward to key events throughout March and April 2003.

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**Publication Date: March 2003**  
**Price £195 / Euro295**

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## Eastern European Logistics Identifying growth opportunities

According to the European Commission, 'enlargement' is one of the "most important opportunities for the European Union at the beginning of the 21st century". Ten countries are on track to become new members: Czech Republic, Estonia, Hungary, Lithuania, Poland, Slovak Republic, Slovenia, Malta, Cyprus and Latvia. These nations are aligning their freight transport policies with the European model as part of the accession process. If alignment efforts are successful, it is envisaged that these

nations will be granted EU membership in May 2004.

The central location of these countries provides what many observers call the 'gateway' between east and west. Rapidly developing countries are experiencing an influx of foreign direct investment, mainly from Europe, US and Japan. In terms of logistics practices, Central and Eastern Europe will benefit from the presence of large Western European and US logistics providers.

Their experience will enable the local logistics industry to leapfrog years of development, through modern distribution practices supported by leading IT systems. However, significant investment is required in logistics infrastructure before distribution practices can match those of the Western Europe and the US. Investment in warehousing is progressing and improvements are being made to poor quality road networks.

The countries with the greatest potential for logistics providers are Poland, the Czech Republic and Hungary. The increasing amount of investment on the part of US and Western multinationals in

the region, migrating from more costly production locations to Eastern Europe provides proof of the potential for providing logistics services in the region. Of a total of nearly US\$100.0 billion of

foreign direct investment in the region, Poland accounts for 40.0%, the Czech Republic 27.0% and Hungary 24.0%.

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#### 3.2 Investment case studies of companies expanding in the region

#### 3.3 Sectoral Analysis

- Automotive parts and accessories experience significant growth in Poland
- Some 498 foreign-owned food companies operate in Poland
- High growth rates and investment in the Polish electronics sector
- Chemicals, paints and pharmaceuticals sectors growth at 6% and 7% per annum in Poland
- The automotive sector in the Czech Republic stimulates growth
- Plastics in the Czech Republic to exhibit strong growth over the next ten years
- 60% of electronics manufacturers in the Czech Republic are foreign-owned
- The automotive sector in Hungary

### 4.0 COUNTRY INFRASTRUCTURE AND INVESTMENT ANALYSIS

#### 4.1 Poland

- Poland has been the main focus for foreign direct investment in the region
- The road network is poor but expanding
- Modern warehousing is being developed by western logistics providers

#### 4.2 Czech Republic

- Germany and France are the largest investors in the Czech Republic
- The Czech government plans to double the length of the motorway network
- Warehousing stock in the Czech Republic has grown significantly since 1999

#### 4.3 Hungary

- 45 of the global top 50 multinationals are present in Hungary
- Most attractive warehouse locations are to the southwest of Budapest

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### 5.0 LOGISTICS CASE STUDIES AND CONTRACT NEWS

- Tibbett & Britten awarded long-term open book contract by Csemege-Match of Hungary
- GeoLogistics wins contract with Faurecia Fotele Samochodowe
- Tibbett & Britten wins contracts in Czech Republic and Slovakia
- General Motors Poland awards Emery Worldwide three-year contract
- FM Logistics Polska begins contracts with Auchan, Geant Casion and SCA Hygiene in Poland
- Tibbett & Britten expanded operations in Poland with Henkel
- TNT Logistics wins contract with TRW in Italy and Poland

#### 5.2 Competitive Analysis Case Study - Poland

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Why should you purchase this Brief?

The Analytiqa Brief 'Eastern European Logistics: Opportunities for Logistics Providers' provides a concise analysis of:

- The relative attractiveness of each 'accession' country in terms of logistics
- Infrastructure information relating to warehousing and road networks
- Investment by foreign-owned companies in the region

- Local or domestic logistics providers
- The activities of Western European and US logistics providers in the region
- Socio-economic data on a country by country basis

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Gate House - Fretherne Road - Welwyn Garden City - Hertfordshire AL8 6NS  
Tel: +44 (0)1707 37 22 11 Fax: +44 (0)1707 37 22 99  
Email: [info@analytiqa.com](mailto:info@analytiqa.com) [www.analytiqa.com](http://www.analytiqa.com)

