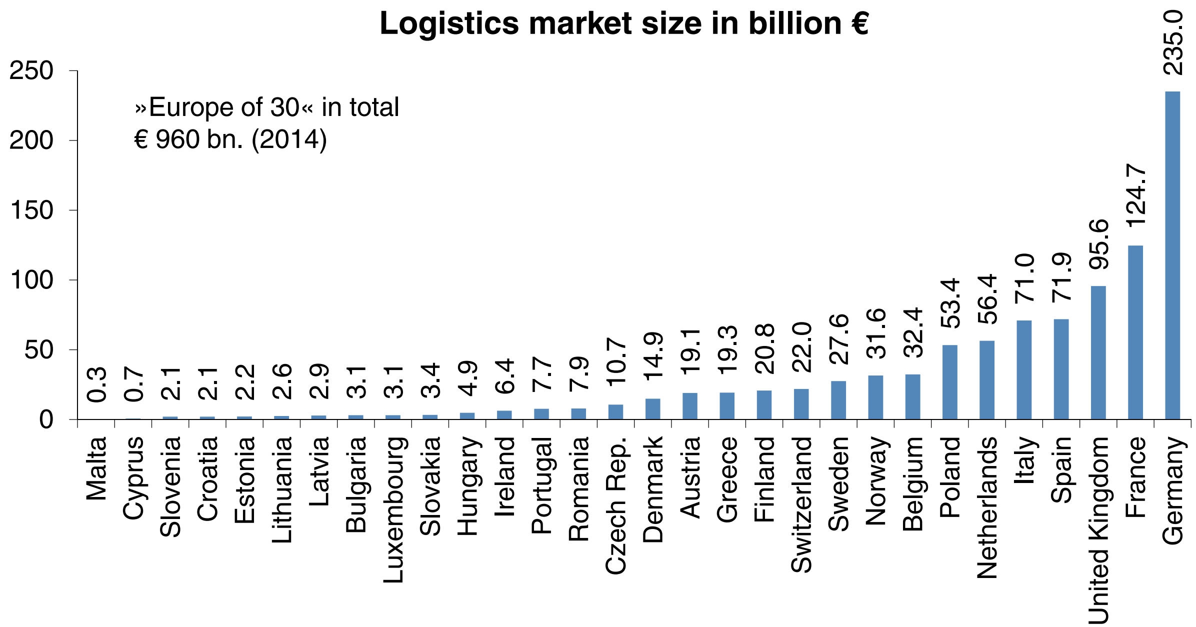
DVZ TOP 100 2015 2016

»Top 100 in European Transport and Logistics Services 2015/2016«

Fraunhofer Center for Applied Research on Supply Chain Services SCS, Nuremberg



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The study describes the European logistics market and offers profiles on LSPs, countries and industries

Contents of the study

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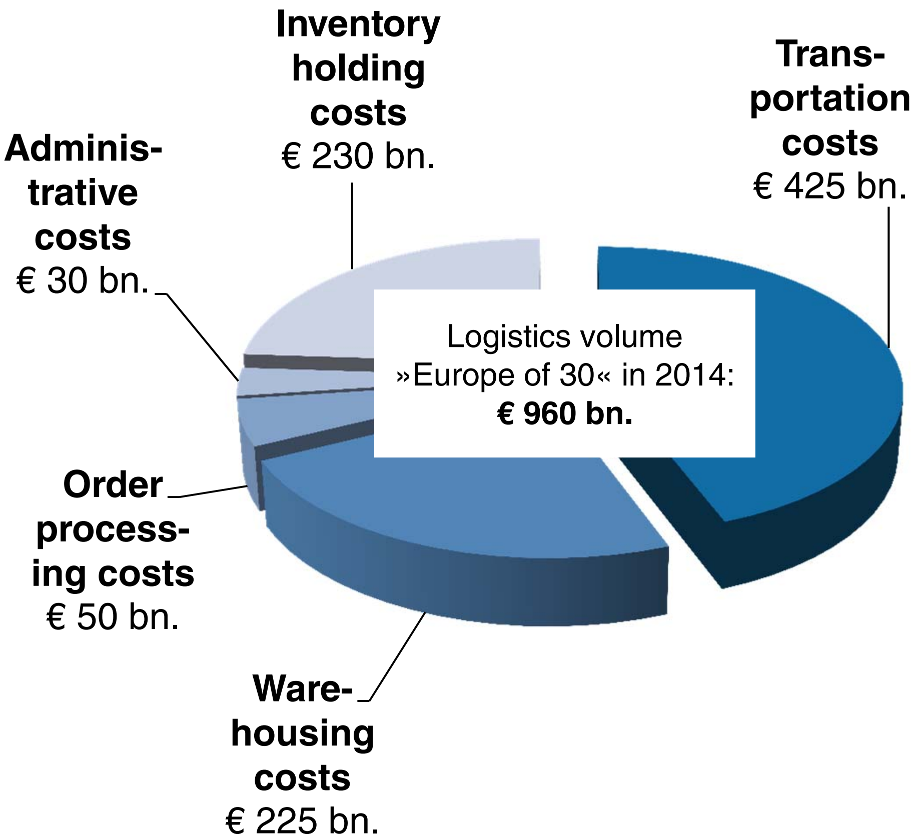
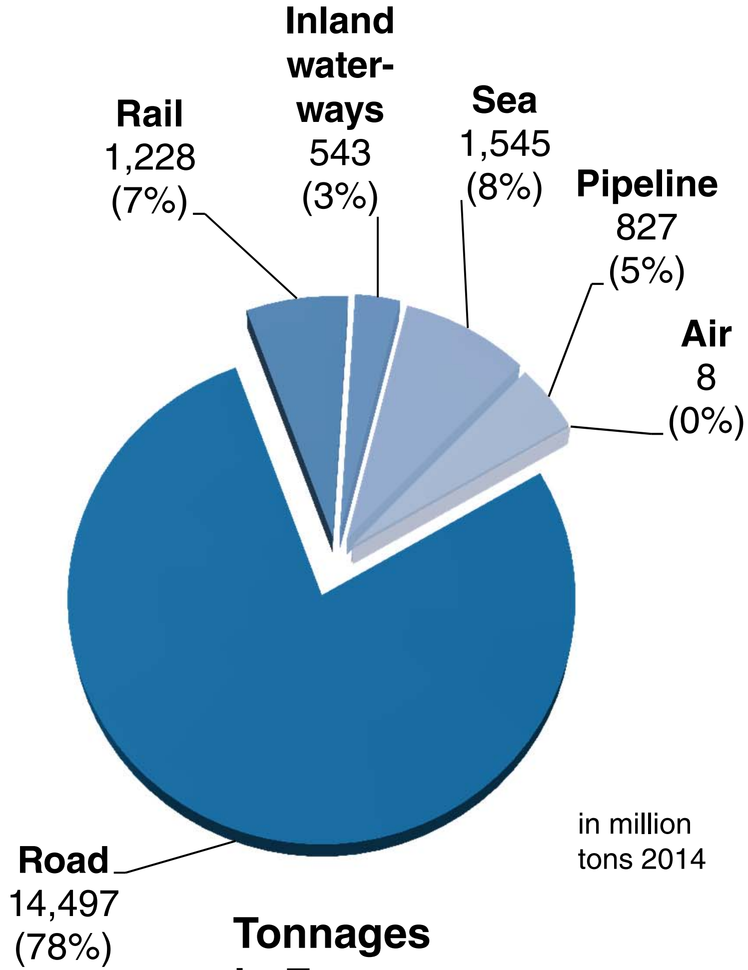
The European logistics market accounts for € 960 billion in 2014 and transports 18.6 billion tons

Market volume Europe 2014





Tonnages in Europe

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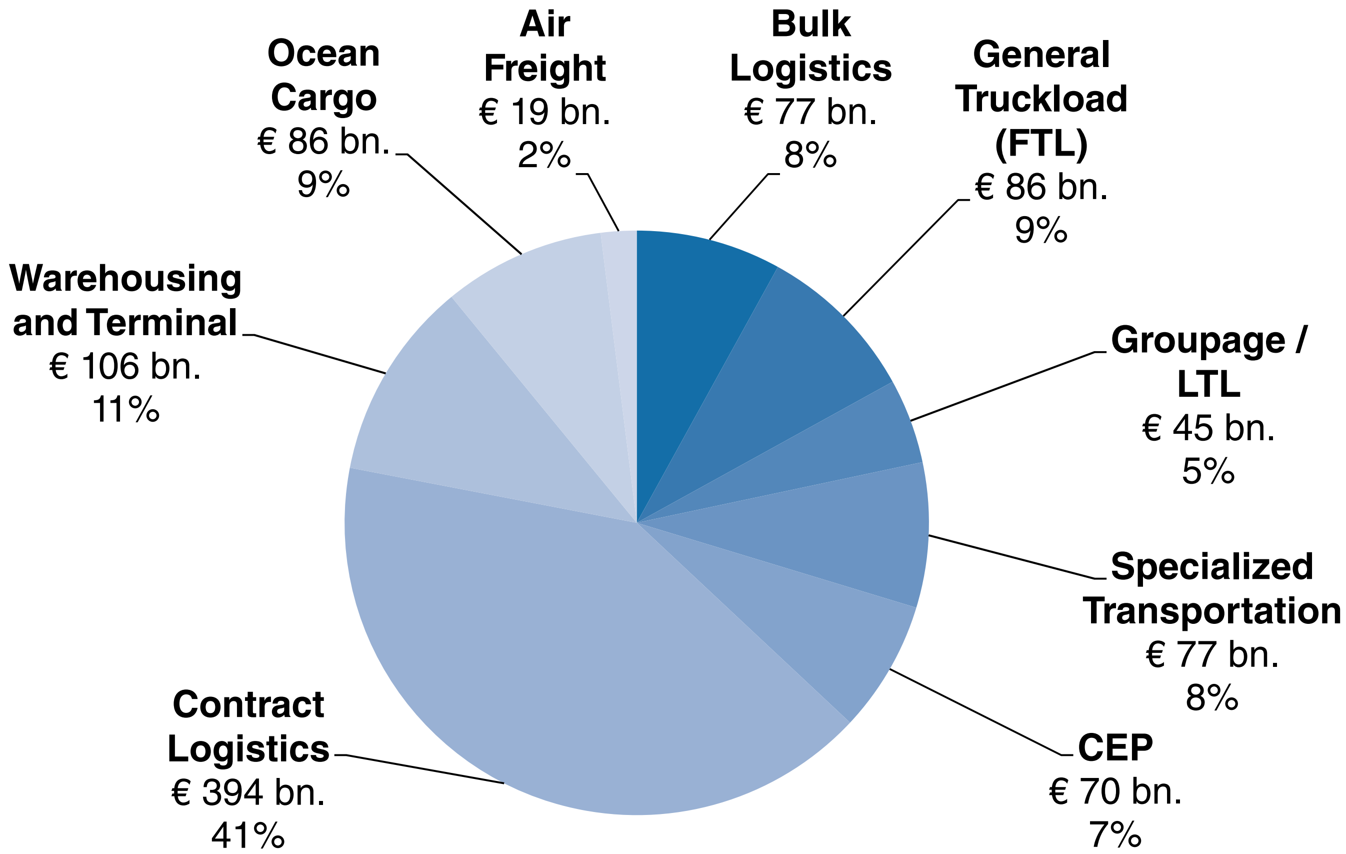
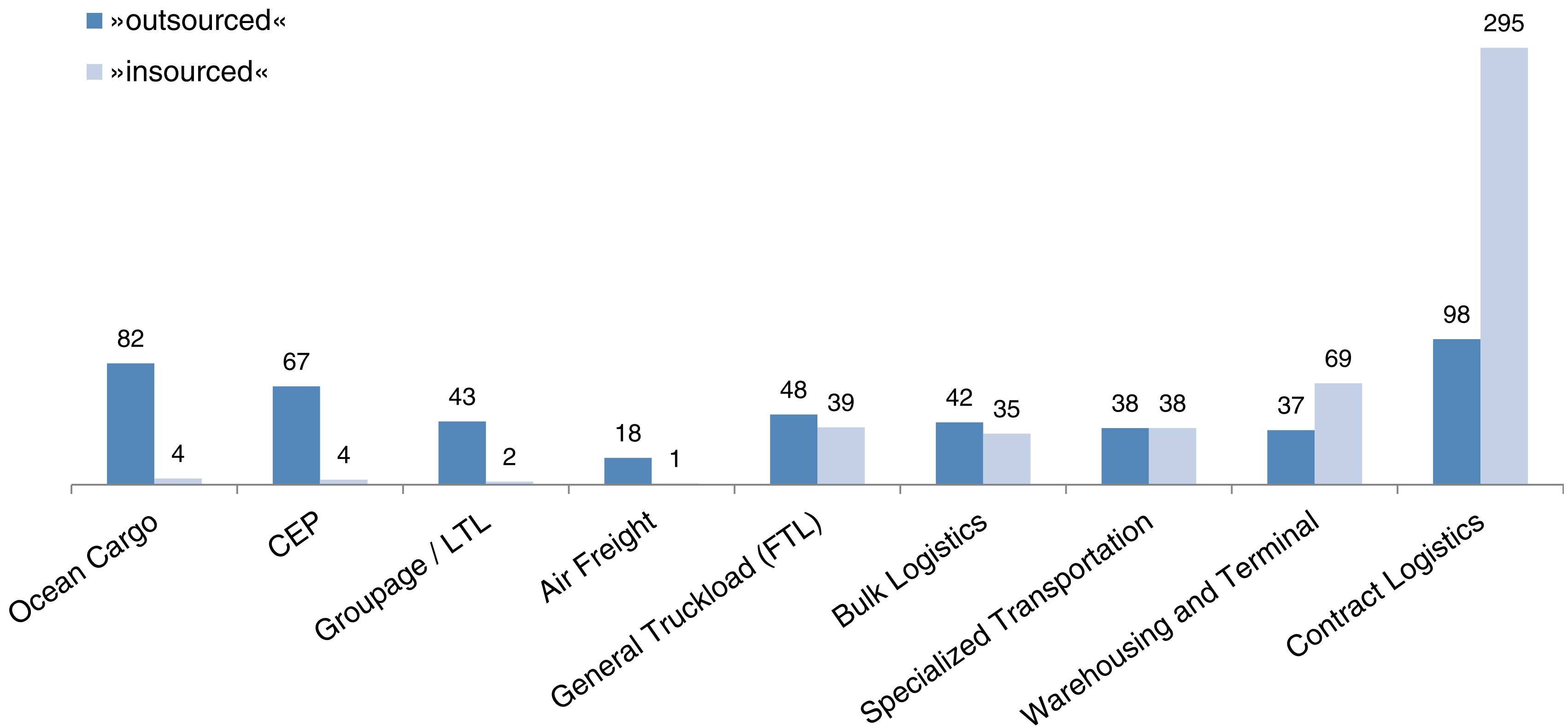
Contract logistics accounts for more than 40% of the European logistics market volume

Share of market segments in the total market volume of € 960 billion



The outsourcing degree in contract logistics is still at low level and does not tap the full potential

»Insourced« and »outsourced« shares per market segment in billion €



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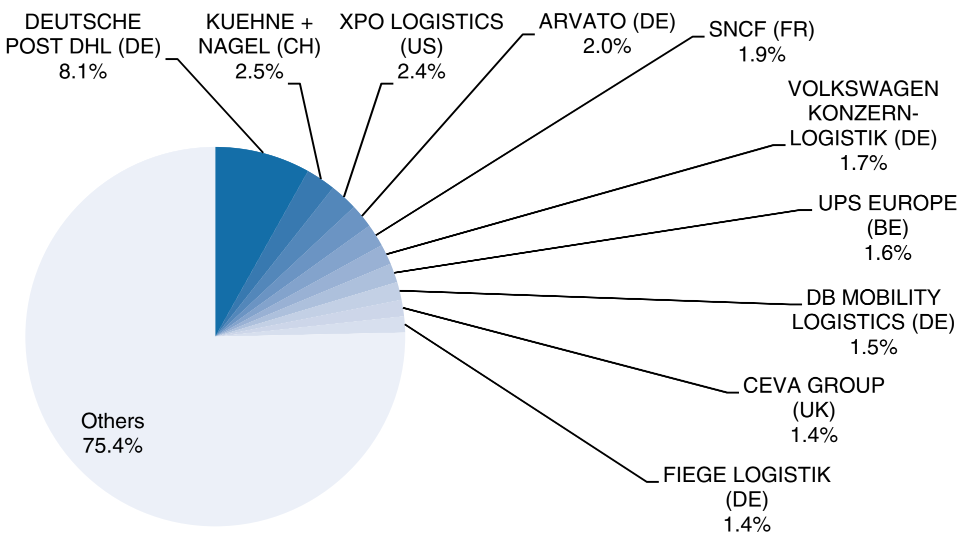
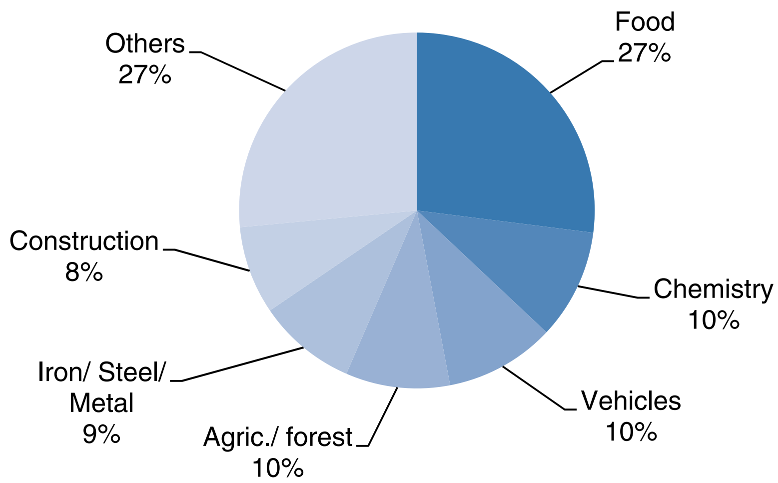
Nine market segments are surveyed regarding different topics

Market segment Contract Logistics





Shipping industries

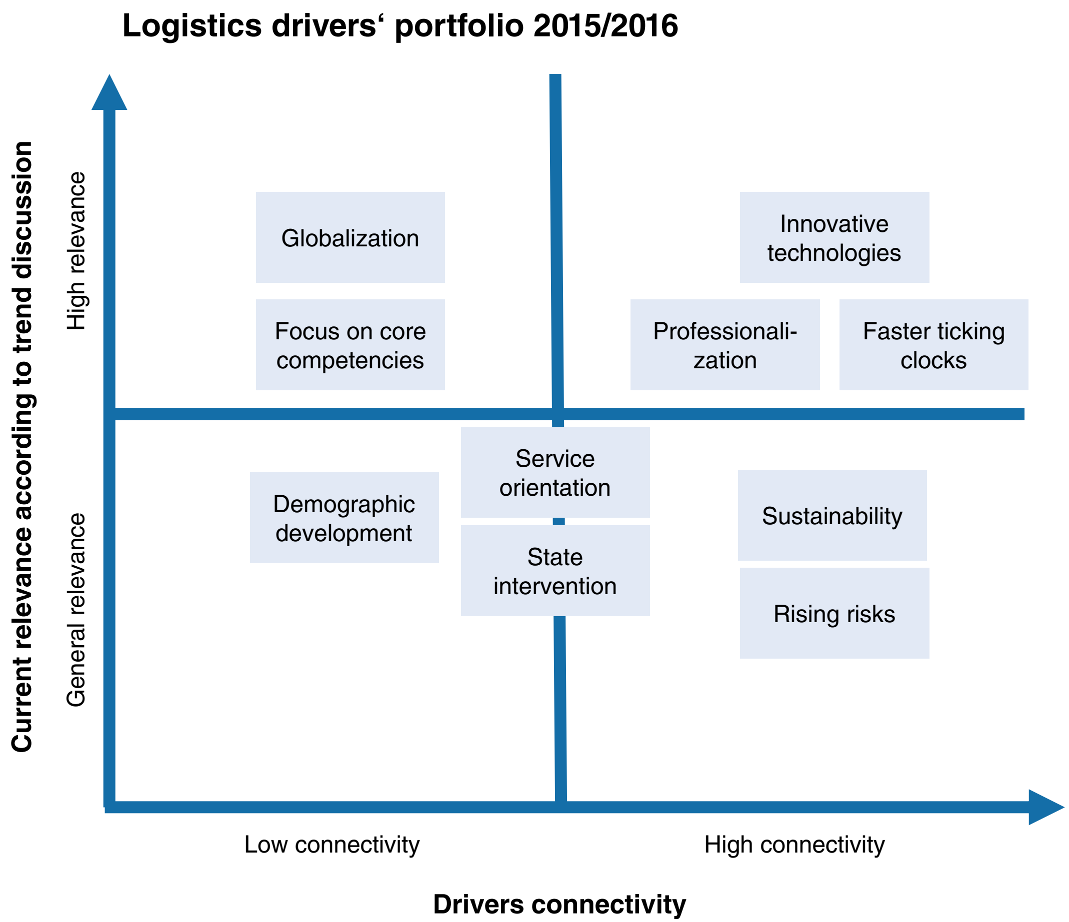
Detailed trend profiles examine ten drivers, which are influencing the European logistics market

Ten drivers concept

1. Globalization 2. Demographic development 3. Sustainability 4. State intervention 5. Rising risks	**Drivers which can be hardly influenced**
6. Professionalization – efficiency 7. Focus on core competencies – effectiveness 8. Service orientation 9. Innovative technologies 10. Faster ticking clocks	**Drivers which can be adopted for successful business options**

The ten trends are highly interconnected to each other

Interconnectivity of trends

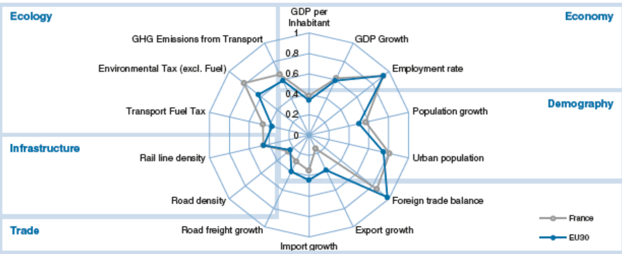


Country Profiles contain information about the EU member states as well as Norway and Switzerland

VI.4.14 France (FR)

1. Basic conditions

Economic data 2014	Key figures	bn. €	% of GDP	EU-average
Gross Domestic Product (GDP in bn. €)		2,059.9	100%	464.8
Population (in million)	65.8			17.3
Gross Domestic Product / inhabitant (in thousand €)	31.3			26.8
Working population / employees (in million)	28.8			8.3
Country size (thousand km²)	550.0			152.9
Population density (inhabitants per km²)	120			113.4
Labor costs (in € per hour)	36.39			22.66
Logistics data				
Absolute transport volume (million tons p.a.)	2,264.5			621.6
Transport intensity (tons / inhabitant p.a.)	34.4			35.9
Overall logistics expenses (in bn. €)		124.7	6.1%	6.9%
- thereof goods transport expenses (in bn. €)		55.5	2.7%	3.1%
-> thereof road, medium distance (km)	82.7	45.4	2.2%	2.1%
-> thereof rail, medium distance (km)	348.7	2.0	0.1%	0.1%
Total logistics expenses (€ / ton)	55.07			51.26
... only goods transport expenses (€ / ton)	24.51			22.84
... only inventory managem. / comm. (€ / ton)	12.94			7.45

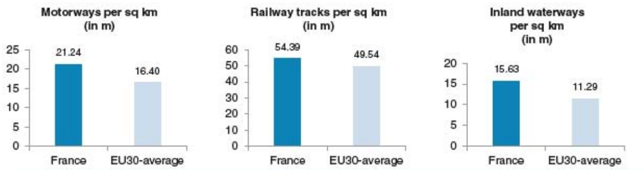


Source: Fraunhofer SCS Research

The macro-economic environment and market size

France was only mildly affected by the crisis in 2009, suffering a GDP decrease of 2.9 % compared to 2008 and recovering immediately in 2010. Afterwards, economic activity increased slowly over the last few years. One of the largest positive net increases in natural population was registered in France (4 per 1000 persons), which explains the average population increase of 0.5 %. A high trade deficit characterizes the French foreign trade, which won't change in future, considering the average import growth rate of 4.7 % and the average export rate growth of 4.1 %. The French transport and logistics market is estimated at € 124.7 bn., making it the second largest logistics market in Europe after Germany. The transport volume measured at 2,264 m. tons and the transport intensity was slightly below the EU average of 35.9 tons per inhabitant. The main transport carrier in France is the road, even though the average road freight performance (tkm) decreased by 2.7 % between 2007 and 2013. Despite the above average railway density, France only has a low share in rail traffic, which represents half the European average. This is somewhat remarkable as long inner-country distances could be covered advantageously by this mode of transport. Greenhouse gas emissions from the transport sector have decreased by 0.88 %, which lies marginally below the European average. The transport fuel tax as well as the environmental tax is lower than the European value, which makes the market attractive to logistics service providers.

2. Infrastructure



Physical infrastructure

France has a well-developed rail and road network. The importance of road traffic is underlined by the over-average density of motorways of 21.24 meter per sq km of land area. The density of railway tracks also is above the European average. Furthermore, the rail network comprises high speed trains connecting important French and European cities and a well-established public-transport system. The ongoing investments in inland waterways like e.g. the new channel Seine-Nord Europe (CSNE), which connects the surrounding northern European countries such as Belgium, Germany and the Netherlands, has led to a density of inland waterways above the European average.

Sources: Eurostat (14.9.15) – Road, rail and navigable inland waterways networks by NUTS 2 regions, CIA – The World Factbook, OECD.

Important hubs

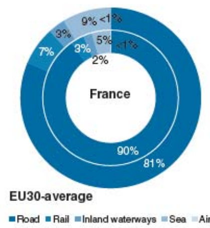
Paris Charles de Gaulle (CDG) is by far the largest air cargo handling airport in France with a volume of about 750,000 tons in 2014. It is also the third largest cargo airport in Europe after Frankfurt / Main and London Heathrow. The further listed airports Paris Orly and Toulouse / Blagnac are not comparable to CDG in regard to the volumes. In France, two thirds of the overall volume of 300 m. tons of sea cargo are handled by the Atlantic and North Sea ports, while one third is shipped from Mediterranean sea ports like the Marseille Europort. The port Le Havre is the gateway between the North Sea and the Atlantic. Le Havre is a deep water port and located directly at the English Channel. The main business is the handling of containers. Dunkerque is located at the Atlantic coast and handled about 36.5 m. tons of freight in 2013.

Airport	Tonnage 2014
Paris CDG	745,443
Paris Orly	34,113
Toulouse / Blagnac	32,702
Seaport	**Tonnage 2014**
Marseille	76,248,000
Le Havre	64,395,000
Dunkerque	36,634,000

Source: Eurostat (20.9.15) – Main airports and seaports by freight tonnage

Modal split

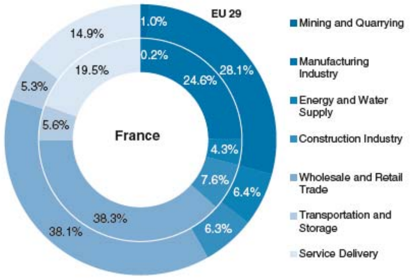
The high importance of France within the European freight transport sector shows the comparatively high share of domestic and outbound moved tonnages of over 12 % of the total volume of the EU30 countries. Moreover, the country shows a broad variety of modes of transport in its modal split. Together with Malta and Switzerland, France has the highest road freight share (90 %) after Luxembourg. With an amount of just under 2 bn. tons moved annually, France is ranked second of the EU countries regarding the road freight volume. This may be due to its economic volume and supported by a comprehensive road network with an over-averaged density of motorways. In addition, the country's rail freight, air cargo and inland shipping, hold some of the highest absolute amounts in moved tons in Europe, making France a leading country with regard to the moved tonnages. In terms of sea freight, France shows an under-average share of 5 % compared to a share of 9 % (EU). Nevertheless, the ports of Marseille and Le Havre count to the most important hubs in Europe.



Source: Fraunhofer SCS Research (tables from Part 3)

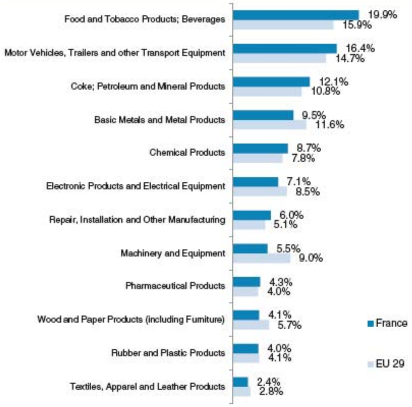
Country Profiles contain information about the EU member states as well as Norway and Switzerland

3. Industrial structure



Industry sectors

The French economy is the second largest in Europe. In contrast to the protectionist politics supporting the industry in the past, the manufacturing sector is currently below the European average and also has an obviously smaller share compared to the European mean. With a share of about 63 %, the tertiary sector, comprising the wholesale and retail trade, transportation and storage as well as service delivery, holds the largest share of France's net product. Especially the service delivery sector lies, with a share of 19.5 % considerably above Europe's average (14.9 %). Furthermore, agriculture plays an important role in France in comparison to other European countries. (Note: agriculture and forestry not included in the data)



Manufacturing industry

The food and tobacco products, beverages industry holds the largest proportion of the manufacturing industry, with a share of about 20 %, followed by the motor vehicles, trailers and other transport equipment industry with a share of slightly above 16 %. Both are above the European average and are therefore among the most important industries in France. Especially in the wine grape cultivation, France has an outstanding position as the country is the largest producer of wines and spirit drinks in the world. Besides the mentioned industries, also the coke, petroleum and mineral products sector shows a share above the European average. In contrast, the machinery and equipment sector shows the highest negative deviation from the European average within the manufacturing industry.

Source both diagrams: Eurostat 13.08.15 – Annual detailed enterprise statistics

4. Logistics data – Top logistics service providers

Rank	Company	Data Quality	Logistics revenue 2014 in m. €	National employees	Logistics revenue 2014 in Europe in m. € (excluding »Mail«)	Notes
1	SNCF (FR)	**	4,880	n/a	9,041	rail cargo / forwarder, via GEODIS CALBERSON
2	CMA-CGM (FR)	*	3,450	n/a	n/a	ocean cargo
3	LA POSTE (GROUP) (FR)	**	3,365	n/a	7,180	CEP, also via GEOPOST
4	STEF (FR)	***	2,162	12,735	2,370	contract logistics / food
5	GEFCO (FR)	*	2,137	n/a	3,037	diversified
6	XPO LOGISTICS (UK)	***	1,690	n/a	4,400	forwarder, formerly NORBERT DENTRESSANGLE
7	BOLLORÉ HOLDING (FR)	***	1,689	5,034	2,252	forwarder
	ASTRE GROUP (Cooperation) (FR)	*	*1,435*	*n/a*	*1,435*	*forwarder*
8	DB MOBILITY LOGISTICS (DE)	***	1,386	7,222	15,107	div., via DB SCHENKER LOGISTICS and DB SCHENKER RAIL
9	DEUTSCHE POST DHL (DE)	*	1,350	n/a	29,700	diversified
10	KUEHNE + NAGEL (CH)	***	1,247	n/a	11,745	forwarder
	Sum Top 10		23,376			
11	TNT EXPRESS (NL)	***	736	4,443	2,743	CEP service provider
12	DACHSER (DE)	***	717	n/a	4,895	forw. / LTL / food log., former GRAVELEAU
13	UPS EUROPE (BE)	*	698	2,500	6,000	CEP service provider
14	EASYDIS (FR)	***	548	n/a	548	FMCG distribution
15	CAT GROUP (FR)	*	530		1,024	automotive contract log.
	Sum Top 15		26,605			

Source: Fraunhofer SCS Research

Top logistics service providers

In France, the national companies play a dominant role in the top 15 ranking. With the acquisition of NORBERT DENTRESSANGLE in mid-2015, XPO LOGISTICS enters the French as well as the European market. The US-American XPO is about to rebrand the former activities of NORBERT DENTRESSANGLE. Market experts expected an entrance of US-American logistics service providers since several years and XPO now turns out to be one of the first to start own operations there. Still, the top list is mainly populated by French based service providers. The large market (in regard to the populations purchasing power as well as geographically) provides good circumstances for strong national service providers. A protective government also supports the national competitors and the top 5 is only composed of national companies. Nevertheless, along XPO, also DB MOBILITY LOGISTICS, DEUTSCHE POST DHL and KUEHNE + NAGEL can be found in the top 10. The top list is led – as in many other countries – by the national railway SNCF, which owns also the large international acting logistics subsidiary GEODIS.

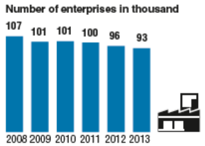
Developments and trends

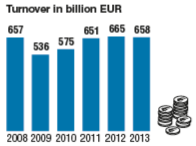
The French GDP growth rate shows a development close to the European average. Regarding the logistics sector, France is focusing on following sustainable solutions in traffic and logistics. The government is also demanding far more awareness of the environment in logistics. A leading initiative is the city logistics concept called »Distripolis« that was developed and executed by GEODIS and started its operation in Paris in 2011. The rollout is planned to be completed in 2015 with the opening of seven new bases, which will increase their number of registered electric vehicles up to 75. Further expansions to other French cities as well as to European metropolitan areas are being planned. A further French infrastructure project is the new channel Seine-Nord Europe (CSNE), which will be opened in 2017, offering an alternative for freight transportation from the regions Paris and Le Havre to the Belgian, Dutch and German waterway network. Additionally, France has quite ambitious expansion plans for the port Le Havre. The objective is to become the benchmark port for stakeholders in the automotive industry worldwide. Therefore, the expansion of the inland terminal of Le Havre is pushed with the aim to handle 500,000 vehicles by 2020. All these projects show that France is heading for alternative freight transportation with the aim to reduce the share of road freight transportation. Additionally, the country promotes its logistics location as being efficient and simultaneously sustainable.

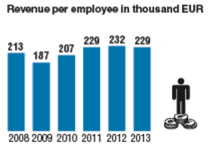
The »Top 100« team also included industry profiles for four important European industry sectors (Food, Chem. & Pharmac., Machine Engineering, Automotive)

V.3 Machine Engineering

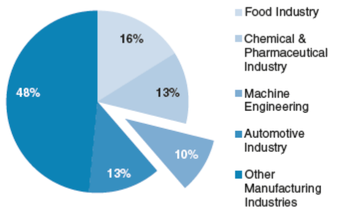
Overview



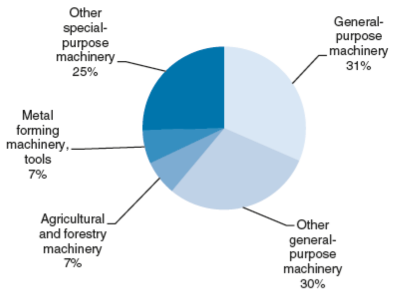




Share of cluster revenue in the manufacturing industry



Revenue by market segments



Eurostat statistics – Annual detailed enterprise statistics for Industry

The machine engineering industry, including general-purpose machinery like turbines, pumps or compressors, ovens, furnaces, machine tools as well as forest and agricultural machinery, accounts for around 10 % of sales in the European manufacturing industry. In 2013, this segment reached sales volumes of nearly € 660 bn. Approximately 2.88 million persons were employed in more than 93,300 companies. Since the peak of the economic crisis in 2009, revenues of the mechanical engineering cluster realized average yearly growth rates of almost 5.3 %. Most of the market participants – numerical more than 89 % – are medium-sized and small enterprises with less than 50 employees. Large and very large companies, having more than 50 people staff, account for almost 85 % of annual turnover and stand for more than 77 % of industry workforce. Referring to inherent market segments, the two categories general-purpose machinery (e.g. engines, turbines, pumps or solar heat collectors) and other general-purpose machinery (e.g. ovens, lifting and handling equipment or power-driven hand tools) account for more than 60 % of branch revenues. Concerning turnover in the European machine engineering industry, Germany is by far the largest economy standing for almost 40 %. Italy, as the second largest producer, accounts for 17 % followed by France with 7 %.

Demand for logistics services

Top manufacturers in Europe

The European top 15 in the mechanical engineering industry is headed by the German company SIEMENS, which achieved revenues of € 12.8 bn. in 2014. The company is followed by THYSSENKRUPP with sales of € 10.8 bn. and CATERPILLAR with € 10.4 bn. SIEMENS and THYSSENKRUPP are strongly diversified and also operating in various other segments like mobility, power and gas, material science or steel. CATERPILLAR, which is ranked third, and CNH INDUSTRIAL, number 4, are leading manufacturers of construction and agricultural machines. LIEBHERR, DEERE and CLAAS are producing construction, agricultural or forestry machines and equipment, too. SCHINDLER and KONE are highly specialized enterprises and worldwide leading fabricators of elevators, escalators and moving walkways. VESTAS, a Danish supplier of wind power plants, realized a turnover of almost € 4.2 bn. in Europe in 2014 and reached position 8 in the ranking. KION, which is a supplier of forklift trucks and warehouse technologies, was founded in 2006 as a subsidiary of LINDE. All in all, this ranking is dominated by enterprises originating from Germany (6), Switzerland (2) and the United States (3).

Rank	Company	Data quality	Revenue 2014 in Europe in m€	Employees 2014 in Europe	Annotations	Product portfolio
1	SIEMENS	***	12,766	211,000	Revenue of division energy in EMEA	Power generation/ distribution/ transmission, energy application
2	THYSSENKRUPP	**	10,750	90,389	European share in relevant divisions	Components, industr. solution, elevator technology,
3	CATERPILLAR	***	10,431	23,246	Revenues of relevant divisions in EMEA	Energy, transport, resource & construction industries
4	CNH INDUSTRIAL	**	6,925	41,756	EMEA share in relevant divisions	Agricultural equipment and construction equipment
5	GENERAL ELECTRIC	**	6,470	n/a	European share in relevant divisions	Divisions power & water and oil & gas
6	LIEBHERR INTERNATIONAL	***	5,149	33,094		Construction machines, mining, cranes, material handling
7	DEERE & CO	*	4,300	31,000	European share in net sales	Equipment, construction & forestry, agriculture & turf
8	VESTAS WIND SYSTEMS	***	4,167	11,043	Revenue in Europe and Africa	Wind energy
9	KION GROUP	***	3,814	17,752	Linde Material Handling and Still	Forklift trucks, warehouse technologies, automation
10	BOSCH	**	3,550	174,025	European share in relevant division	Division industrial technology
11	SCHINDLER HOLDING	***	3,304	19,578		Elevators, escalators and moving walkways
12	KONE	***	3,204	20,700	Revenues EMEA	Elevators, escalators and automatic door solutions
13	CLAAS GROUP	***	3,083	9,432		Agricultural engineering equipment
14	ATLAS COPCO	***	3,040	18,472		Compressors, construction and mining equipment, power tools
15	VOITH INDUSTRIAL	***	2,583	21,978		Hydropower plants, power transmission, industr. services

**** direct company information ** derived from company information * estimated*

Fraunhofer SCS Research, Annual Reports 2014

Sector specific requirements

The machine engineering industry is characterized by a high degree of individualized production processes and a large variety of types of goods. To keep complexity manageable, many logistics activities are operated insourced by producers and retailers themselves. Another indicator for this is the low presence of logistics companies providing dedicated services solely for this branch. The majority of the assigned service providers are diversified players with an extensive range of services. Regarding contract logistics in machine engineering, the requirements are quite similar to the automotive industry although processes differ to a certain degree. The share of non-standardized procedures is stronger. Potential customers must be convinced through high quality standards and reliability. Value added services like assembly, packing or export preparations are of high relevance, too.

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The »Top 100« team also included industry profiles for four important European industry sectors (Food, Chem. & Pharmac., Machine Engineering, Automotive)

Supply of logistics services

Top logistics service providers in Europe

Due to the multilayered product structure in machine engineering, ranging from stackable, packaged to bulky, heavy goods, it is hard to identify logistics service providers that are solely focused on this branch. It is rather the case that diversified logistics groups are offering services for customers from the mechanical engineering industry as a part of their entire portfolio. Classical forwarders as well as transport and contract logistics providers like CEVA, FIEGE, GEIS, KUEHNE + NAGEL, PANALPINA, RHENUS or XPO LOGISTICS are offering transport, handling, storage, warehousing as well as value added services. Various small and medium-sized logistics companies develop customer or industry specific solutions and act rather on a national or regional level. Moreover, machine engineering enterprises can also be found in the client base of heavy haulage companies.

Logistics service provider	Assign-ment	Logistics revenue in Europe in m€	Logistics revenue worldwide in m€	Logistics employees worldwide	Annotations
Diversified LSPs - Machine Engineering as part of service portfolio					
AGILITY LOGISTICS (UK)	**	960	3,431	n/a	Forwarder, contract logistics
CEVA GROUP (UK)	**	2,567	5,932	42,165	Forwarder, contract logistics
DB SCHENKER LOGISTICS (DE)	**	10,249	14,943	64,810	Forwarder, contract logistics
DEUTSCHE POST DHL (DE)	**	29,700	47,812	443,784	Forwarder, contract logistics
EWALS CARGO CARE (NL)	**	549	549	1,700	Transport logistics
FIEGE LOGISTIK (DE)	**	1,400	1,400	9,000	Contract logistics
HANS GEIS (DE)	**	913	913	6,022	Transport, contract logistics
IMPERIAL LOGISTICS (DE)	**	1,560	2,780	n/a	Transport, contract logistics
KATOEN NATIE GROUP (BE)	*	500	1,000	10,041	Contract logistics, on-site logistics
KUEHNE + NAGEL (CH)	**	11,745	14,549	63,448	Forwarder, contract logistics
PANALPINA (CH)	**	2,159	5,576	15,639	Forwarder, contract logistics
RHENUS (DE)	**	4,135	4,230	25,000	Forwarder, contract logistics
UTI WORLDWIDE (US)	**	920	3,692	21,306	Forwarder, contract logistics
WINCANTON (UK)	**	1,514	1,514	n/a	Forwarder, contract logistics
XPO LOGISTICS (US)	**	4,400	4,669	42,500	Forwarder, contract logistics

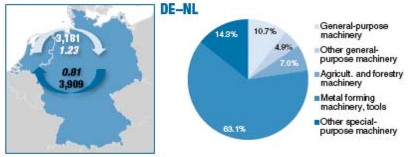
**** LSP entirely specialized or via division   ** LSP addresses industrial segment partially   * estimated*   *Fraunhofer SCS Research*

Challenges for logistics services providers and relationship with shippers

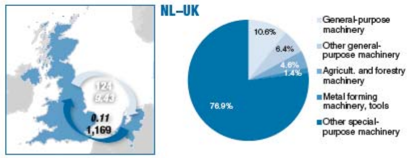
The goods structure in machine engineering is multilayered and ranges from packaged to bulky goods. Therefore, the cooperation between shipper and logistics service provider is structured in various ways. Packed machine tools or valves have relatively low requirements and can be handled and transported in a quite simple manner. On the other hand, necessary logistics activities for heavy goods like special-purpose machines or turbines, poses huge challenges to logistics companies. Therefore, it is important to create individual solutions and to adapt processes in time. To prepare and to coordinate new procedures, the involved parties have to establish a transparent flow of information. Process quality is a critical success factor, whereas projects within the mechanical engineering industry are less standardized and less oriented towards concepts like »just in time«. Due to the special features of products, logistics companies need to offer dedicated value added services (e.g. assembly).

Industry specific flows of goods

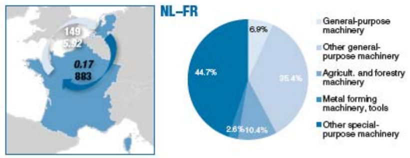
Top 5 intra EU trade lanes (values in thousand tons)



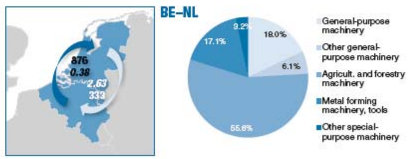
DE–NL While transports from Germany to the Netherlands are clearly dominated by metal forming machinery and tools, backhauls show a high share in other general-purpose machinery and other special-purpose machinery (76 %) like ovens, lifting equipment, power-driven hand tools and machinery for metallurgy or food processing.



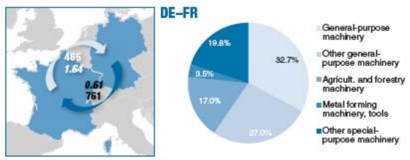
NL–UK The trade lane from the Netherlands to the United Kingdom is highly imbalanced, showing a poor statistical trade indicator of only 0.11. Dutch consignments in particular contain other special-purpose machinery (for mining, construction, paper production or food processing) representing nearly 77 %.



NL–FR The third largest intra-European trade lane in the machine engineering industry, with a tonnage volume of 882.7 million tons, is from the Netherlands to France. The statistical trade indicator is also very low, which can be another indication of the role of the Netherlands as sea freight gateway for Europe.



BE–NL Transports from Belgium to the Netherlands account for 876.4 million tons and show a relative high stake of more than 55 % in agricultural and forestry machinery. Return shipments are dominated by the same group of goods, but only to a degree of 39 %.

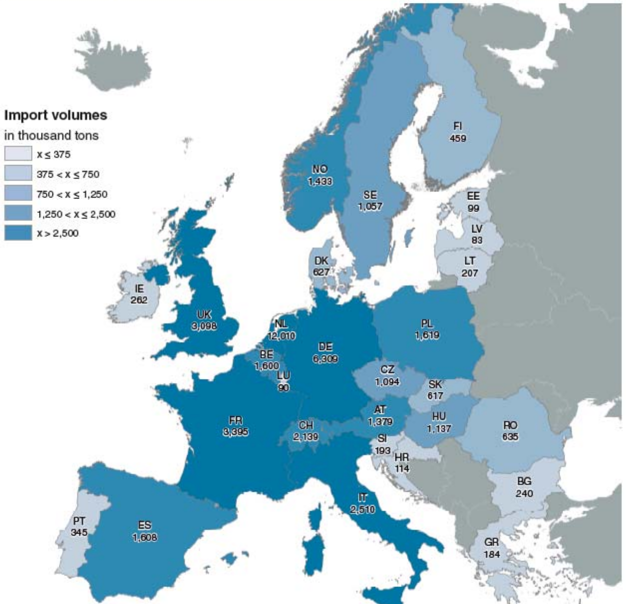


DE–FR The route from Germany to France within the European mechanical engineering industry shows a tonnage volume of approximately 760.8 million tons and a statistical trade indicator of 0.61, resulting in the fifth position of top trade lanes. The distribution of shares to subsections is quite similar for both directions.

Fraunhofer SCS Research (values from 2014)

The »Top 100« team also included industry profiles for four important European industry sectors (Food, Chem. & Pharmac., Machine Engineering, Automotive)

Worldwide import volumes

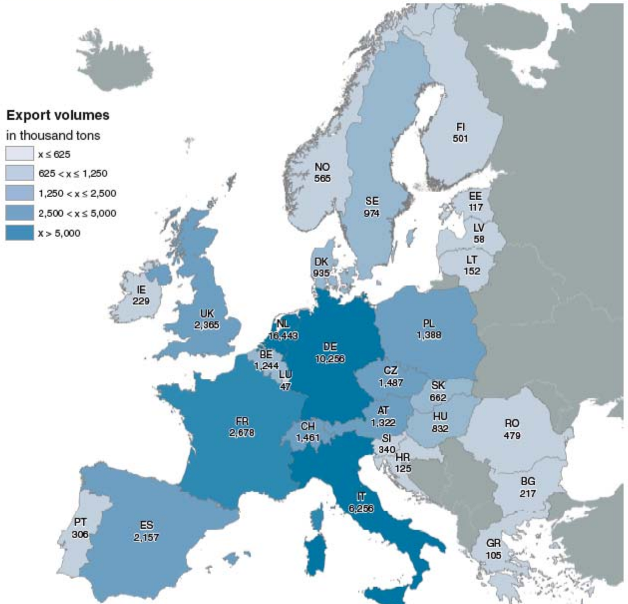


Fraunhofer SCS Research (values from 2014)

Import and export volumes

The Netherlands is the largest importer as well as exporter of products of the mechanical engineering industry in Europe. The most important trading partner is Germany, representing a stake in exports of more than 36 % and in inbound shipments of approximately 60 %. These figures underline the role of the Netherlands as gateway and distribution center for German (and many other European countries') consignments to and from all over the world. German imports are dominated to a high degree of around 13 % by Chinese deliveries, whereas the majority of exports go to the United States (about 8 %). Another important hub in the European machine engineering industry is Italy. The Italian exports are two and a half times higher as its imports. Most important trading partners are Germany, France and the United States (for outbound deliveries, about 28 %) as well as China, Germany and France (for inbound shipments, around 51 %). All in all, the European producers of machine engineering goods are highly interconnected with non-European trading partners.

Worldwide export volumes



Fraunhofer SCS Research (values from 2014)

Trends and developments

The machine engineering industry is confronted with various trends and future challenges. Upcoming topics like »Cyber-Physical-Systems« and a rising degree of automation (see trend discussion on »innovative technologies« and »professionalization«) will increase complexity and the requirements regarding plants, machines and other components. Therefore, the customers from the mechanical engineering industry require more comprehensive, integrated and customized solutions as well as completely new after-sales services at a global level. Machinery and equipment have to be delivered to customers all around the world, if possible even as »turnkey« solutions. Moreover, the users of these products also want to have extensive warranty claims supported by value added services like on-site assembly, maintenance and repair, at best, anywhere in the world. The increasing demand for additional services is definitely getting stronger and opens the opportunity for the logistics service providers to grow with their customers and to grow into new and as yet undeveloped market sectors.

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In Germany, Deutsche Post DHL, DB Mobility Logistics and Dachser are the leading market players

Top 10 Germany 2014

Rank	Company	Data Quality	Logistics revenue 2014 in m. €	National employees	Logistics revenue 2014 in Europe in m. € (excluding »Mail«)	Notes
1	DEUTSCHE POST DHL (DE)	*	7,340	170,596	25,840	diversified
2	DB MOBILITY LOGISTICS (DE)	***	7,121	122,970	15,107	div., via DB SCHENKER LOGISTICS and DB SCHENKER RAIL
3	DACHSER (DE)	***	2,850	13,058	4,895	forw. / LTL / food log.
4	KUEHNE + NAGEL (CH)	***	2,623	n/a	11,745	forwarder / net forw. rev.
5	RHENUS (DE)	***	2,300	n/a	4,135	forwarder
6	VOLKSWAGEN KONZERNLOGISTIK (DE)	*	1,800	n/a	2,400	VOLKSWAGEN owned contract logistics
7	UPS EUROPE (BE)	*	1,700	18,000	6,000	CEP service provider
8	HERMES EUROPE (DE)	*	1,650	n/a	2,230	CEP, forwarding
9	GEOPOST (FR)	***	1,585	7,500	4,921	CEP, via DPD
	CARGOLINE (cooperation) (DE)	***	*1,415*	*n/a*	*2,054*	*LTL cooperation*
	E.L.V.I.S. (cooperation) (DE)	***	*1,388*	*n/a*	*2,018*	*part load network*
10	HELLMANN WORLDWIDE (DE)	***	1,364	n/a	1,810	forwarder
	Sum Top 10		30,333			

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Deutsche Post DHL is still the worldwide leader

Top 25 Europe 2014

Rank	Company	Data quality	Logistics revenue in Europe 2014 in m. €
1	Deutsche Post DHL (Group) (DE)	***	25,840
2	DB Mobility Logistics AG (DE)	***	15,107
3	Maersk A/S (DK) (ocean carrier)	*	14,850
4	Kuehne + Nagel International AG (CH)	***	11,745
	DB Schenker Logistics (part of DB Mobility Logistics AG) (DE)	***	*10,249*
5	SNCF SA (FR)	**	9,041
6	La Poste (Group) (FR)	**	7,180
7	CMA-CGM SA (FR) (ocean carrier)	*	6,900
8	The Royal Mail Holdings Plc. (UK)	***	6,620
9	UPS Europe NV (BE)	**	6,000
10	DSV A/S (DK)	**	5,415
	Sum Top 10		108,698
	GeoPost SA (part of La Poste) (FR)	***	*4,921*
11	Dachser SE (DE)	***	4,895
	DB Schenker Rail (part of DB Mobility Logistics AG) (DE)	***	*4,858*
12	XPO Logistics Inc. (formerly Norbert Dentressangle SA) (US)	***	4,400
13	Rhenus SE & Co. KG (DE)	***	4,135
14	Mediterranean Shipping Company Holding SA (MSC) (CH) (ocean carrier)	*	3,800
15	Gefco SA (FR)	**	3,037
16	TNT Express (NL)	***	2,743
	Damco International B.V. (part of Maersk) (NL) (ocean carrier)	***	*2,603*
17	CEVA Group Plc (UK)	***	2,567
18	Volkswagen Konzernlogistik GmbH & Co. OHG (DE)	*	2,400
19	STEF SA (FR)	***	2,370
20	Bolloré Holding SA (FR)	***	2,252
21	Hermes Europe GmbH (DE)	**	2,230
22	Hapag-Lloyd Aktiengesellschaft (DE) (ocean carrier)	**	2,200
23	Panalpina Welttransport AG (Holding) (CH)	***	2,159
	General Logistics Systems B.V. (GLS) (part of Royal Mail) (NL)	***	*2,100*
24	Rail Cargo Austria (division of ÖBB) (AT)	***	2,073
	CargoLine GmbH & Co. KG (cooperation) (DE)	***	*2,054*
	E.L.V.I.S. AG (cooperation) (DE) (partner revenues)	***	*2,018*
25	Arvato (DE)	*	2,000
	Sum Top 25		151,959

Rank	Company	Home country	Data quality	Logistics revenue worldwide 2014 in bn. €	Notes
1	Deutsche Post DHL	DE	***	48.0	diversified
2	UPS Inc.	US	***	47.9	CEP / div.
3	FedEx Corp.	US	***	43.2	CEP / div.
4	Maersk A/S	DK	***	29.7	ocean cargo
5	DB Mobility Logistics AG	DE	***	19.8	diversified
6	Union Pacific Railroad	US	***	18.6	rail cargo
7	BNSF Railway Company	US	***	18.4	rail cargo
8	Russian Railways	RU	**	16.9	rail cargo
9	Nippon Yusen K.K. (NYK Group)	JP	***	16.0	ocean cargo
10	Kuehne + Nagel International AG	CH	***	14.5	forwarder
	Sum Top 10			273.0	
11	CMA-CGM SA	FR	***	13.8	ocean cargo
12	Indian Railway	IN	**	11.1	rail cargo
13	Mitsui O.S.K. Lines (MOL)	JP	***	10.9	ocean cargo
14	Hyundai Glovis Co. Ltd.	KR	***	10.4	contract logistics
15	CSX Corporation	US	***	10.1	rail cargo
16	Nippon Express Co. Ltd.	JP	**	10.0	forwarder
17	Samsung Electronics Europe Logistics B.V.	NL	***	10.0	contract logistics
18	Norfolk Southern Railway	US	***	9.6	rail cargo
19	Yamato Holdings Co. Ltd.	JP	**	9.3	CEP / div.
20	SNCF SA	FR	***	9.0	diversified
21	China Cosco Holdings	CN	***	8.5	ocean cargo
22	Kawasaki Kisen Kaisha Ltd. (K Line)	JP	***	8.2	ocean cargo
23	Canadian National Railway	CA	***	8.1	rail cargo
24	MSC SA	CH	*	7.6	ocean cargo
25	La Poste Group	FR	**	7.2	CEP
	Sum Top 25			416.7	

Top 25 World 2014

Contact:

Martin Schwemmer

E-Mail: martin.schwemmer@scs.fraunhofer.de

Telefon +49 (0) 911 58 0 61 – 95 60
Fax +49 (0) 911 58 0 61 – 95 99

Fraunhofer-Arbeitsgruppe für Supply Chain Services SCS

Fraunhofer Center for Applied Research on Supply Chain Services SCS

Nordostpark 93
90411 Nürnberg

www.scs.fraunhofer.de